CalSAWS

CalWIN ISS

Implementation Support Services

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

August 07, 2023

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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/05/22	.01	Original	Deloitte
11/01/22	1.0	Wave 1 Go-Live	Deloitte
02/03/23	2.0	Wave 2 Initial Publication	Deloitte
02/28/23	2.1	Wave 2 Update Go-Live Publication	Deloitte
03/31/23	3.0	Wave 3 Initial Publication	Deloitte
04/24/23	3.1	Wave 3 Update Go-Live Publication	Deloitte
05/30/23	4.0	Wave 4 Initial Publication	Deloitte
07/03/23	4.1	Wave 4 Update Go-Live Publication	Deloitte
08/07/23	5.0	Wave 5 Initial Publication	Deloitte
09/05/23	5.1	Wave 5 Update Go-Live Publication	Deloitte

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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.

EBT Account List	
Issuance History	
Expungement History	> Full Case Review is required, before EDBC is run and authorized. Please refer to the Manual Case
Child Support Collections	Review Job Aid for instructions on how to proceed. Programs Affected: CalFresh.
Time Limit Aid Summary	
Case Flag	A Case Flags

Figure 2.1-1 – Yellow Banner on a Case

CASE CLEAN-UP

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

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

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

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

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

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

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 <u>BY CASE</u> and see whether that case appears in one or more of the Conversion Reports. This allows counties to look at one list of cases, and complete cleanup across all reports for each individual case.
	<u>Go-Live Navigator File Location</u> : • Alameda – <u>Here</u>
	 Fresno – <u>Here</u> Sonoma – <u>Here</u>
	The various reports referenced in the Go-Live Navigator are provided in the sections below.

2.1.1 ELIGIBILITY STAFF

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

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. <u>CIT Location:</u> <u>Here</u> Reports showing impacted cases are provided below. <u>Report Location:</u> • Alameda – <u>Here</u> • Fresno – <u>Here</u> • Sonoma – <u>Here</u>	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.	Immediate
	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.	

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

Case Review Guides (CRGs)	Description	Time to Complete
	<u>Report Location</u> : • Alameda – <u>Here</u> • Fresno – <u>Here</u> • Sonoma – <u>Here</u>	
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. <u>Report Location:</u> • Alameda – <u>Here</u> • Fresno – <u>Here</u> • Sonoma – <u>Here</u>	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. <u>Report Locations:</u> • Alameda – <u>Here</u> • Fresno – <u>Here</u> • Sonoma – <u>Here</u>	Immediate

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

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

Discrepant Case Reports	Description	Time to Complete
 Active Programs Aid Code Discrepancy Aided Individuals 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	Immediate
3. Individuals Attached to Cases Discrepancy	discrepant and requires user to review these cases and resolve the discrepancy, as required	
 Individuals Attached to Program Discrepancy 	Further instructions to address these cases can be found in – CalWIN	
5. Net Benefit Amount Discrepancy	ISS_GLP_Appendix A_DiscrepantCaseReports	
6. Sanctions Discrepancy	Reports showing impacted cases are provided below.	
7. Application Discrepancy	Report Locations:	
8. Pending Application Individuals Discrepancy	 Alameda - <u>Here</u> Fresno - <u>Here</u> Sonoma - <u>Here</u> 	
 Pending Programs Discrepancy 	NOTE: If a aiven Discrepant Case	
10.Recovery Account Discrepancy	Report is not produced, there are no cases impacted, and no action is	
11.Recovery Account Outstanding Balance Discrepancy	required by the County.	
12.Recovery Account Responsible Party Discrepancy		
13.Case Discrepancy		
14.Future Appointment Discrepancy		
15.Placement Discrepancy		

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

Page Name	Homeless Perm	CalSAWS Field Name(s)	 Program Status Application Date
What Will You Experie	ence?		
During the conversion Permanent programs listed for the program already processed a	n of cases from CalWII s may be converted a n. <i>Homeless Permaner</i> nd should show as ina	N to CalSAWS, some cases s "Active" with the last nt type is a one-time p ctive.	ases with Homeless – application date ayment which has

2.2.1.1 HOMELESS PERMANENT PROGRAMS

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

		Case Name:			lauraat 📰 a	ka 🙆 testa =	Decourse			Deret	
	Cal SAWS	Case Number:	Eligibility	Empl.	Child Care	Resource	Fiscal	Special	Reports	Client	Admin Tools
	Connucleancy ICT Summary	- Homele	ess - Perm	Services		Databank		Ünits		Corresp.	
	IAT Summary	Worke	er:				Primary	/ Applicant	/Recipient:		
	Customer Contact History	Worke	er ID:		Activo		Langua Rhone I	ge:			
	SB 87 Invoice History	Progra	ini Status:	l	Active		Email:	umber:			
	Linkages General Ledger	FBU:			0		Payee: Applica	tion Date:		10/16/20	09
	Valuable History	Name			Role	Role Rea	son	Status	S	tatus Reaso	on
	Case Copy List				MEM MEM			Active Active			
										Vie	ew Details
							_				
			Figu	Jre 2.	2-1 – H	omele	ss – Pe	erm			
How V	Vill This Affec	t the C	ase?								
There	is no downs	tream i	mpact	t on tl	he cas	e.					
What :	Should You I	Do?									
You c	an clean up up on vour c	the re	cords s ad as "	so the Activ	at the e e" and	erronea I cause	ous rea e conf	cord c iusion.	loes n	ot con	tinue to
You m status oracti	nay choose to "Disconti ce rules rela	to man nued." Ited to	ually ru These manua	un ED actic al EDE	BC to u ons will BCs and	update be de d over	e the p pende rides.	orogro ent on	am sta I Coun	tus an ty bus	d the pers iness
1.	Place your select Cust	cursor omer Ir	over th nforma	ne Elig Ition f	gibility t rom th	ab on e Locc	the G 11 navi	jobal gator.	navigo	ation k	bar and
2.	Click the M Manual ED	lanual I BC pag	EDBC li ge.	ink or	n the Tc	ask na	vigatio	on bar	r to ac	cess th	ne Create
3.	Confirm the CalSAWS fr	e corre om the	ct ben Manu	efit m al ED	nonth h BC Rea	ias bei ason d	en cho Irop lis	osen c t.	and se	lect M	onth Prior
4.	Check the the Create	box ne Manua	ext to th al EDBC	ne ap 2 but	proprio ton.	ate Ho	meles	is – Pei	rm prc	gram	and click
5.	Click the He page.	omeles	s Perm	link t	o acce	ess the	Home	eless -	- Perm	EDBC	(Manual)
6.	Click the Se	et Progi	ram Co	onfigu	Jration	butto	n to ne	avigat	te to th	ne Pro g	gram

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 Experie	ence?		
Records displayed or records displayed in Home." These record	n the Expense List pag the CalWIN system for Is can/should be hidde	e in CalSAWS may not persons deemed "Perr en to avoid viewing th	match the expense manently Out of eir information.

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

Case Summary Case Summary Case Name Corresp. Corresp. Corresp. Case Number: Case Name County County County County Case Number: Case Number: Case Number: Case Number: Case Number: Case Number Case Number: Case Number: Case Number Case Number Case Number Case Number Case Summary Case Number: Case Number Case Number Case Number Add Case Summary Case Number: Case Number Case Number Case Number Case Number Case Summary Case Number: Case Number Case Number Case Number Case Number Case Summary Case Number: Case Number Case Number Case Number Case Number Case Number: Case Number: Case Number: Spanish Spanish Spanish Case Plag RE Due Month: 06/2022 Phone Number: Spanish Spanish Case Sarch Maid Code: 09 - CalFresh Application Date: 07/12/2016 Af Summary Aid Code: 09 - CalFresh Applicat		Case Info	Eligibility	Empl.	Child Care	Resource	Fiscal	Special	Reports Cl	lient Admin Tools
Case Summary Case Name County Case Name County Case Name County Case Name County Case Name Case Name Case Name <		cuse mo	Ligiture)	Services		Databank	, issue	Units	Cor	resp.
Case Name County Gase Name County Price Sarch - Companion Cases Sarch Application Registration - Companion Cases Case Number Case Name Case Summary Case Number Case Number Case Number Case Summary Case Number Summary Summary Summary Case Number Case Flag Worker: Vorker ID: Primary Program Status: Active Worker ID: Case Number: Case Search Case Number: Case Search Case Search Cattomer Contact History SAR Due Month: Sa 7 Aid Code: Sa 7 Aid Code: Sa 87 Public Assistance Indicator: FBU: Save ESAP Criteria: Yes Public Assistance <	Case Summary	Case S	Summai	r y						
Go Person Search EEF Acount Search Application Registration Codes Summary Cose Summary Contact Authorized Representative Application Questions Negative Action Busuance History Child Support Collections Summary Case Flag Conferesh Morker ID: Program Status: Active Case Flag Confidentiality Case Flag Confidentiality RE Due Month: 06/2022 Reporting Type: Semi-Annual Reporting Reporting Type: Semi-Annual Reporting SAR Due Month: 12/2021 Aid Code: 0 MaGI Case Search Case Status Castorer Contact History SAR Due Month: Biolication: Yes Public Assistance Indicator: FBU: 0 Name Role Role Reason Status Status Reason Market SSAP Criteria: Yes Public Assistance	Case Number:	Case Na	ame				County			
Person Search Companion Cases Bapplication Registration Case Number Case Name Case Number Case Name Case Number Case Name Case Number Case Name Contact Authorized Representative Application Questions Display: Segurace History Image: Susance History - CalFresh Worker ID: Applicator/Recipient: 65F Program Status: Active Language: Spanish Case Flag 06/2022 Phone Number: Email: Reporting Type: Semi-Annual Reporting Payee: 65F Radi Case Search Meets ESAP Criteria: Yes 55F MAGI Case Search Meets ESAP Criteria: Yes 99 - CalFresh Application Date: 07/12/2016 Made Ledger 0 Image: Status Status Reason 55F 55F Made Mistory 0 Image: Status Status Reason 55F Made Ledger Status Status Reason 55F MEM 20F Mater SESAP Criteria: Yes Yes <td< td=""><td> Go</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>	Go									
Case Number Case Name Case Name Add Application Registration Case Number Case Name Add Authorized Representative Display: Image: Second Sec	Person Search	- Compa	anion Case							
Case Summary Contact Authorized Representative Application Questions Negative Action Busance History Auxiary Authorization List Expungement History Child Support Collections Time Limit Aid Summary Case Flag Legacy Case Confidentiality RE Due Month: 12/2021 SAR Due Month: 12/2021 Aid Code: 09 - CalFresh Application Date: 07/12/2016 MAGI Case Search Customer Contact History Bas 7 Invoice History Uinkages General Ledger Valuable History Name Role Role Role Reason Status Status Status Status Customer Contact History Bindicator: Public Assistance Indicator: FBU: 0 Name Role Role Role Reason Status Status Reason	Application Registration	Case Ni	umber				Case Nam	ne		
Contact Authorized Representative Application Questions Negative Action Negative Action Image: Second S	Case Summary									Add
Application Questions Display: 00/1/2022 View Issuance History Auxiliary Authorization List Expungement History Child Support Collections Worker ID: Moregram Status: Active Canguage: Spanish Ime Limit Aid Summary Program Status: Active Language: Spanish Lagacy Case Re Due Month: 06/2022 Phone Number: Equipation Collections Spanish Confidentiality SAR Due Month: 12/2021 Email: Email: <t< td=""><td>Authorized Representativ</td><td>e [</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	Authorized Representativ	e [
Negative Action - CalFresh Auxilary Authorization List	Application Questions	09/01/2022	🗔 🚺 🚺	ew						
- CalFresh Auxiliary Autorization List Expongement History Child Support Collections Time Limit Aid Summary Program Status: Active Language: Spanish Time Limit Aid Summary Case Flag Legacy Case Program Status: Active Language: Spanish Confidentiality Re Due Month: 12/2021 Phone Number: F LTT Summary SAR Due Month: 12/2021 Application Date: 07/12/2016 MAGI Case Search Meets ESAP Criteria: Yes Ves Ves Ves Customer Contact History Public Assistance Indicator: Yes Ves Ves Ves Sard G5F MEM Active Ves Ves Ves Ves Valuable History FBU: 0 Ves Ves <td>Negative Action</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Negative Action									
Expansement History Worker: Primary Primary Applicant/Recipient: 65F Child Support Collections Worker ID: Active Language: 65F Time Limit Aid Summary Program Status: Active Language: Spanish Legacy Case Re Due Month: $06/2022$ Phone Number: Email: Email: </td <td>Auxiliary Authorization Lie</td> <td>← CalFre</td> <td>sh</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Auxiliary Authorization Lie	← CalFre	sh							
Child Support Collections Worker ID: Active Language: Spanish Time Limit Aid Summary Program Status: Active Language: Spanish Case Flag 06/2022 Phone Number: Email: Case Flag Legacy Case 06/2022 Phone Number: Email: Case Flag Confidentiality Reporting Type: Semi-Annual Reporting Payee: 65F ICT Summary Aid Code: 09 - CalFresh Application Date: 07/12/2016 MAGI Case Search Meets ESAP Criteria: Yes Vertex Status 07/12/2016 MAGI Case Search Meets ESAP Criteria: Yes Vertex Status 07/12/2016 Invoice History FBU: 0 0 Castus Status Reason General Ledger 65F MEM Active Vertex Status Valuable History 65F MEM Active Vertex Status Point Of Service 0 MEM Active Vertex Status	Expungement History	Work	er:				Primary	/ nt/Recipient:	65F	
Time Land Summary Program Status. Active Phone Number: Case Flag 06/2022 Phone Number: Email: Legary Case Confidentiality Reporting Type: Semi-Annual Reporting ICT Summary SAR Due Month: 12/2021 Payee: 65F IAT Summary Aid Code: 09 - CalFresh Application Date: 07/12/2016 MAGI Case Search Meets ESAP Criteria: Yes Yes Valuation Indicator: Invoice History FBU: 0 0 Valuable History Valuable History FBU: 0 Active Point Of Service MEM Active Active	Child Support Collections	Work	er ID:		Activo		Langua	ge:	Span	ish
Legacy Case RE Due Month: Re-Evaluate Email: Confidentiality Reporting Type: Semi-Annual Reporting Payee: 65F IGT Summary SAR Due Month: 12/2021 Application Date: 07/12/2016 IAT Summary Aid Code: 09 - CalFresh Application Date: 07/12/2016 MAGI Case Search Meets ESAP Criteria: Yes Yes Customer Contact History Public Assistance Indicator: 0 Yes Invoice History FBU: 0 0 Valuable History 65F MEM Active Valuable History 65F MEM Active	Case Flag	Progr	am status:		06/2022		Phone M	Number:		
Confidentiality Reporting Type: Semi-Annual Reporting ICT Summary SAR Due Month: 12/2021 65F IAT Summary Aid Code: 09 - CalFresh Application Date: 07/12/2016 MAGI Case Search Meets ESAP Criteria: Yes Yes Yes Customer Contact History Public Assistance Indicator: Yes Invoice History FBU: 0 Valuable Reson Status Reason General Ledger MEM Active Yes Valuable History 65F MEM Active	Legacy Case	RE Du	ie Month:		Re-Evaluat	te	Email:			
ICT Summary SAR Due Month: 12/2021 Image: Sar Due Month: 12/2021 IAT Summary Aid Code: 09 - CalFresh Application Date: 07/12/2016 MAGI Case Search Meets ESAP Criteria: Yes Yes Yes Customer Contact History Public Assistance Image: Sar Due Month: Yes Invoice History FBU: 0 Unication Date: Valuable History General Ledger 65F MEM Active Yaluable History 65F MEM Active	Confidentiality	Repor	rting Type:		Semi-Annua	al Reporting	Payee:		65F	
And Code: 00 - Carriesin de la code de la construcción de la code de la construcción de la code de	ICT Summary	SAR E	Due Month:		12/2021		Applicat	tion Date:	07/1	2/2016
Customer Contact History Public Assistance SB 67 Indicator: Invoice History FBU: 0 Linkages Name Role Role Reason Status General Ledger 65F MEM Active Valuable History 66M MEM Active	MAGI Case Search	Meets	oue: 5 ESAP Crite	eria:	Yes	511				
SB 87 Indicator: Invoice History FBU: 0 Linkages Name Role Reason Status General Ledger 65F MEM Active Valuable History 65F MEM Active Point Of Service AMEM MEM	Customer Contact History	Public	c Assistanc	e						
Invoice History FBU: 0 Linkages Name Role Role Reason Status Status Reason General Ledger 65F MEM Active Valuable History 65M MEM Active	SB 87	Indica	ator:							
Conservation Name Role Role Reason Status Status Reason General Ledger 65F MEM Active Active Valuable History 65M MEM Active Active Point Of Service 34M MEM Desired Active	Invoice History	FBU:			0					
Valuable History Point Of Service Point Of Service Active Control Cont	General Ledger	Name			Role	Role Re	ason	Status	Status Rea	ason
Point of Service Communication of Service Comm	Valuable History		6	5H	MEM			Active		
34M MEM Defiled	Point Of Service		34	1 <u>M</u>	MEM			Denied		
Case Copy List View Details	Case Copy List									View Details
All People Associated with the Case Name DOB Age Gender, SSN CIN Person # Household Status		All Peop Name	le Associat DO	ed with th	e Case Gender	SSN	CIN	Person #	Household S	Status
34 M <u>03</u> Permanently Out of the Home				3	4 M			03	Permanently	Out of the Home
65 F <u>01</u> In the Home				6	5 F			<u>01</u>	In the Home	
				6	6 M			02	In the Home	

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

	Case Name:		~							2
	Case Number:	-	Emol	Child Care	Bosource	Resources	Page Mappin	g MImages	DCFS Imag	Jes 🕜 Log Ou
	Case mill	Engibility	Services		Databank	Tiscal	Units	Reports	Corresp.	Admin 100
Customer	Expens	se List								
	*- Indicat	es required	fields							Continue
Case Number:	• Root Q	uestions								
Person Search										
Non Financial	Search R	esults Sun	nmary						Result	51-4of4
Root Ouestions	_				Display From:		То	:		
Income	-									View
Tax Household	Cated	jory	Туре	D	escription		Begi	n End		
Property							Date	Dat	e	
Special Needs Expenses			Deet	A	partment/Hou	use/Condo/1	railer, og (o	4/2000		Edit
Medicare	U <u>Sneite</u>	er	Kent	e	tc. Rent		02/0	4/2009	Vie	ew History
Hunt v. Kizer	□ <u>Shelt</u> e	<u>er</u>	Rent	R	ent Z05		08/0	1/2022	-	Edit
GA/GR									Vie	ew History
IC 355	Remove			Exper	nse Category	:*			~	Add
BT Account List	_									Complete
A CL VIII E anti-										
AGI vernications										Continue
MAGI Vernications	This Ture 1		0 d- t- l-							Continue
MAGI Eligibility Run EDBC	This <u>Type 1</u>	page took 0.5	8 seconds to la	ad.						Continue
MAGI Verifications MAGI Eligibility Run EDBC Manual EDBC	This <u>Type 1</u>	page took 0.5	8 seconds to lo	ad.						Continue
MAGI Verifications MAGI Eligibility Run EDBC Manual EDBC Needs	This <u>Type 1</u>	page took 0.5	8 seconds to la	vad.						Continue
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MAGE Eligibility Run EDBC Manual EDBC Needs Service Arrangements ► ABAWD EDBC Results Vill This Affect is no downs ver, viewing sion. Should You M/Update I Place your Select Curs	ct the C stream i g inform Do? Househe	Fig Case? impac ation old Sta	⁸ seconds to le ure 2.2 Into that m That m That m	ad. 2-3 – Ex he cas hay no gibility	xpense se. of be re	the G	age t to the	e case	es may	Continue / CaUs

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

CalSAWS Source/Reference

CA-247001

2.2.1.3 BAD CALWIN RECORDS

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experie	ence?		
In CalWIN, duplicate	persons are identified	as a "bad CWIN."	
Persons previously inc to which they are ass data collection page	dicated as bad CWIN i sociated, including pe es.	records in CalWIN will (rson-specific information)	appear on the cases on on the various
How Will This Affect th	ne 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	Cltizenship	CalSAWS Field Name(s)	N/A
What Will You Experi	ence?		
For cases with a pers in a UEID getting get	son who has overlapping nerated.	g CITZ records editing any fie	ld may result

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

Non-Citizens					
Name		Citizen Type	Begin Date	End Date	
	<u>at 29M</u>	Lawful Permanent Resident	12/01/2005	03/05/2008	Edit View History
•	<u>at 29M</u>	Lawful Permanent Resident	03/06/2008	06/12/2015	Edit View History
	<u>at 29M</u>	Naturalized US Citizen	01/01/2014	06/12/2015	Edit View History
	<u>at 29M</u>	Lawful Permanent Resident	06/13/2015		Edit View History
		Figure 2.2-4 – Cifiz	enship Pag	е	
. \A/!!! TI.!. /					
v Will This A	Affect the C	ase?			
w Will This A rs cannot es a UEID o	Affect the C update this occurs prev	ase? page. Also, when el enting all further prod	fective da cessing.	ting logic is	applied for th
v Will This / rs cannot es a UEID at Should Y	Affect the C update this occurs prev You Do?	ase? page. Also, when et enting all further prod	fective da cessing.	ting logic is	applied for th
v Will This / rs cannot es a UEID a at Should N 1. Navigo dates (applico	Affect the C update this occurs prev (ou Do? (to the C (for any give able).	ase? page. Also, when effecting all further prod itizenship Status page en date, only one Cit	fective da cessing. e and selec izenship Sto	ting logic is t the recor itus record	applied for th d with the errors
v Will This A rs cannot es a UEID o at Should N 1. Navigo dates (applico a.	Affect the C update this occurs prev You Do? ate to the C for any give able). On the Citiz End dates	ase? page. Also, when effecting all further prod itizenship Status page on date, only one Cit cenship Detail page,	fective da cessing. e and selec izenship Sto validate ar	ting logic is t the recor itus record	applied for th d with the erro should be the Begin and
v Will This 7 rs cannot es a UEID o at Should Y 1. Navigo dates (applico a. 2. Once y	Affect the C update this occurs prev You Do? Ate to the C for any give able). On the Citiz End dates you do that	ase? page. Also, when effecting all further prod itizenship Status page on date, only one Cit cenship Detail page, so you should be able t	fective da cessing. e and selec izenship Sto validate an	ting logic is t the record itus record ad correct t	applied for th d with the error should be the Begin and

2.2.1.5 PERSON APPLICATION CONVERTED WITHOUT DENIAL EVENTS

Page Name	Program Detail	CalSAWS Field	d Name(s)	N/A		
What Will You Experi	What Will You Experience?					
Some Program and events. As a result o The Rescind button	Person application f the missing denia s not available on	ns are converte I events, there i the Program D a	d with no as is no option etail page.	ssociated denial to rescind benefits.		
Program Id Status: * Active Application 07/01/2014 SSI/SSP R Add Reporting Semi-Annua Public Assi N Automatica	Iformation Status Date: * RE Beg Edit 07/202: eversal Month: I Reporting - No Report stance Indicator: NII Reassign When Activated:	Reason: in Month: 2	Source: * In Person RE Due Month: * 06/2025			
 ▼ Expedite Type 	d Service Request Date	Entitled	Recorded Date	Add		
Administra	tive Roles					
Name	Administrative Role Primary Applicant/Recipient Payee	Begin Date End Date 05/01/2006 01/01/2012	Use Between Payee	Edit Edit		
			0	Add		
Program P	ersons	Bassan and the second	Chalue D			
Name	MEM MEM	Active Active Active Denied Discontinued	Status Reason	Edit Edit		
	Figure 2.2-5 -	- Program Deta	il Page			

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

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)	Туре	
What Will You Experi	ence?			
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.				
	Case Info Eligibility Empl. Child Care Services	Resource Fiscal Special Report Databank Units	s Client Admin Tools Corresp.	
Reporting	Customer Reporting List			
Case Number:	Display Display Type: Name: CF RE Packet All	From: T	o: View	
Customer Reporting	Type Name Submit Month No Data Found	Program Status Sta	tus Date	
	This <u>Type 1</u> page took 0.34 seconds to load.			
Figure 2.2-6 – CalSAWS Customer Reporting List Page				

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

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 Rel Limit Summa	ief Time	CalSAWS Field Iame(s)	From,	То
What Will You Expe	erience?				
When reviewing G GA/GR Employme General Relief	A/GR time limit ant Services Wo Time Limit Su	rs, the dates rk Registratic ummary	will not be pop on entry.	ulated due to	o a missing
Display by All	v Name:	From:	To:		View
Name 365 Begin Month	365 End Month	GR 277 Days Used	GR 277 Days Exempt	GR 277 Days Remaining	
No Data Found					
This <u>Type 1</u> page took 0.90	seconds to load.				
	-igure 2.2-7 – C	alSAWS GR T	ïme Limit Summ	ary Page	

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

					Continue
Search Results Summary				Re	sults 1 - 2 of
Display by Name: All V	Type: All	Fro	om: 	To:	View
Name	Туре	Status	Begin Date	End Date	Add
	CFET	Mandatory	04/10/2023	~	Edit View History
	CFWR	Mandatory	04/07/2023		Edit View History
Remove					Add Complet
			N		Continue
Figu	ıre 2.2-8 –	CalSAWS W	/ork Registrat	ion List Page	
w Will This Affect the	Case?				
hout the dates, the julations which may	system co cause ov	annot keep erpayment	proper track s.	of the time limits p	er county
at Should You Do?					
Worker will need to	add an e	entry under	Work Registro	ation with the app	ropriate

2.2.1.8 CL9 GOOD CAUSE

Page Name	N/A	CalSAWS Field Name(s)	N/A		
What Will You Experie	ence?				
In CalSAWS, the CL 9 Determination) will no cases.	and CL 9.1 forms (Cal ot be automatically se	-Learn Notice of Good ent to the customer for	l Cause CalWIN converted		
How Will This Affect th	ne 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 awa forms are to be sent	re of this behavior and oer standard business	d take appropriate act processes.	ions when these		
 Place your cui and select Ter 	 Place your cursor over Client Correspondence on the Global navigation bar and select Templates from the Local navigator. 				
2. Type "Good C Form Number	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.					
 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/Ref	erence	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 Experie	ence?			
What Will You Experies As CalWIN does not I and update the Livin facilities, in board an Custome Informati Case Number Readers National School Attends School Attends Schoo	Arrangement Type of d care, or other institu Cas 1d Eligible (Care Cas 1d Eligible (Care) Cas 1d Eligible (Care) New Change Reason: * Eligione on RRE* Name of Location (Institution, Center, S Care) Care (Care) Name of Location (Institution, Center, S Care)	ment Type code, you code for persons who tions in CalSAWS.	will need to review are in long-term care	
Socialized Support	Verified: * Verified Vicer	Save and Add Another Save and Return	Cancel	
Figure 2.2-9 – Living Arrangements Detail Page				
How Will This Affect th	ne 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 Experi	ence?					
If you access a page you will need to com the information, you	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 t	he Case?					
These fields do not h and the primary imp when accessed.	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?						
 Place your cursor over the Eligibility tab on the Global navigation bar and select Customer Information from the Local navigator. 						
2. Click the Indiv List page.	ridual Demographics li	nk to access the Indivi	dual Demographics			

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

3. Click Dem	Click the link of the case person's name to access the Individual Demographics Detail page.		
4. Selec	Select the appropriate voter registration status from the drop list menu.		
5. Click	Click the Save and Return button.		
CalSAWS Sc	SAWS 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 Experie	ence?			
If you you w the in	access a page ill need to com formation, you	where there is a blan plete the mandatory t can cancel out of the	k mandatory field for c field to move forward. page.	a converted case, If you do not know	
How V	Vill This Affect th	ne Case?			
These and the when	fields do not ha ne primary impo accessed.	ave an impact on eligi act is limited to additic	ibility, authorization, or onal data being updat	benefit issuance red on the page	
What	Should You Do?	?			
1.	Place your cu select Custom	rsor over the Eligibility t er Information from th	ab on the Global navi e Local navigator.	igation bar and	
2.	 Click the Non-Compliance link to access the Eligibility Non-Compliance List page (not the Eligibility Non-Compliance Detail page). 				
3.	3. Click the link of the case person's name.				
4.	4. Click the link to access the Eligibility Non-Compliance Detail page.				
5.	5. Update the missing location of conviction information for State and County from the drop list menus.				
6.	6. Click the Save and Return button.				
CalSA	WS Source/Ref	erence	N/A		

2.2.2.4 EXPENSE DETAIL

Page Name	 Expense Detail – When Exper Support – Court Ordered 	CalSAWS Field Name(s)	Name(s) of Child(ren)			
What V	Vill You Experience?					
lf you o you wil the info	access a page where there is a blar I need to complete the mandatory prmation, you can cancel out of the	nk mandatory field field to move forv e page.	d for a conve vard. If you d	rted case, 10 not know		
How W	ill This Affect the Case?					
These f and th when c	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 S	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.	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.	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.					
CalSA	NS 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 you will need the informatio	a page where to complete th on, you can cai	there is a blank n ne mandatory fiel ncel out of the po	nandatory field for a converted case, d to move forward. If you do not know age.			
How Will This	Affect the Case	?				
These fields d and the prim when access	o not have an i ary impact is lim ed.	mpact on eligibil nited to additionc	ity, authorization, or benefit issuance al data being updated on the page			
What Should	What Should You Do?					
1. Place select	your cursor ove Customer Inforr	r the Eligibility tak mation link from t	o on the Global navigation bar and he Local navigator.			
2. Click t	he Financial link	on the Task nav	igation bar.			
3. Click t Other	 Click the Other Health Care link on the Task navigation bar to access the Other Health Care List page. 					
4. Click t	4. Click the Beneficiary link.					
5. Click t	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 Sou	rce/Reference	N/	Ϋ́Α			

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 E	xperience?					
If you access a you will need to the information	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 A	fect the Case?					
These fields do and the primar when accessed	not have an impact on y impact is limited to ad d.	eligibility, autho Iditional data be	rization, or benefit issuance eing updated on the page			
What Should Yo	ou Do?					
1. Place yo select N	our cursor over the Eligib on-Financial from the Lo	ility tab on the G cal navigator.	Global navigation bar and			
2. Click the Program	e Other Prog Assist link o Assistance Detail page	n the Task navig e.	ation bar to access the Other			
3. Click the	3. Click the Edit button.					
4. Review who live	 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 Sourc	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.						

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

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
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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 Experie	ence?		
If you access a page you will need to com the information, you	e where there is a blan aplete the mandatory t can cancel out of the	k mandatory field for a field to move forward. page.	a converted case, If you do not know
How Will This Affect th	he Case?		
These fields do not he and the primary impo when accessed.	ave an impact on elig act is limited to additic	ibility, authorization, or onal data being updat	benefit issuance ted on the page
What Should You Do	?		
1. Place your cu select Custom	rsor over the Eligibility the Information from th	tab on the Global nav e Local navigator.	igation bar and
2. Click the Scho Attendance Li	ool Attend. link on the 1 i st page.	fask navigation bar to	access the School
3. Click the linke	d name entry to acce	ss the School Attenda	n ce Detail page.
4. Click the Edit	button.		
5. Click the Selec Resource pag	ct button under Schoo je.	I Name to access the	Select School
6. Enter the desir	red school information		
7. Complete the "Yes" is select Employment &	e drop lists for Employm ed, you will also need & Training Program and	ent & Training Program to complete the corre d Verified fields.)	n Participation (If sponding
8. Click the Sear	ch button.		
9. Click the radio	o button next to the de	esired school search re	esult.
10. Click the Selec	ct button to confirm de	esired school selection	
11. Click the Save	e and Return button.		
CalSAWS Source/Ref	erence	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 Experie	ence?		
If you access a page you will need to com the information, you	where there is a blan aplete the mandatory t can cancel out of the	k mandatory field for c field to move forward. page.	a converted case, If you do not know
How Will This Affect th	ne Case?		
These fields do not he and the primary imp when accessed.	ave an impact on eligi act is limited to additic	ibility, authorization, or onal data being updat	benefit issuance red on the page
What Should You Do	?		
1. Place your cu select Custom	rsor over the Eligibility t per Information from th	ab on the Global navi e Local navigator.	igation bar and
2. Click the Finar	ncial link on the Task ne	avigation bar.	
3. Click the Tax H	lousehold link on the T	ask navigation bar.	
 Click the Tax F Status is "Marr 	iler link for the desired ied Filing Jointly."	household member w	hose Expected Filing
5. Click the Edit	outton.		
6. Select the app	propriate joint filer from	n the Tax Filing Status A	ssociation drop list.
7. Click the Save	button.		
CalSAWS Source/Ref	erence	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 Experie	ence?		
If you access a page you will need to com the information, you	where there is a blan plete the mandatory t can cancel out of the	k mandatory field for c field to move forward. page.	a converted case, If you do not know

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

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 Experie	ence?		
If you access a page you will need to com the information, you	where there is a blan plete the mandatory t can cancel out of the	k mandatory field for c ïeld to move forward. page.	a converted case, If you do not know
How Will This Affect th	ne Case?		
These fields do not he and the primary impo when accessed.	ave an impact on eligi act is limited to additic	bility, authorization, or nal data being updat	benefit issuance red on the page
What Should You Do?	?		
1. Place your cu select Custom	rsor over the Eligibility t per Information from th	ab on the Global navi e Local navigator.	igation bar and

- 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.

N/A

6. Click the Save button.

CalSAWS Source/Reference

2.2.2.14 WORK REGISTRATION DETAIL

Page Name	Work Registration Detail	CalSAWS Field Name(s)	Status Reason
What Will You Experie	ence?		
If you access a page you will need to com the information, you	e where there is a blan aplete the mandatory can cancel out of the	k mandatory field for c field to move forward. page.	a converted case, If you do not know
How Will This Affect th	ne Case?		
These fields do not he and the primary impo when accessed.	ave an impact on elig act is limited to additic	ibility, authorization, or onal data being updat	benefit issuance red on the page
What Should You Do	?		
1. Place your cu select Custom	rsor over the Eligibility t per Information from th	ab on the Global navi e Local navigator.	igation bar and
2. Click the Work Registration Li	k Regist. link on the Tas st page.	k navigation bar to ac	ccess the Work
3. Click the linke Registration D	d name entry of the d etail page.	esired case member to	o access the Work
4. Click the Edit	button.		
5. Select the app	oropriate reason from	the Status Reason drop	o list.

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

6. Click the Save and Continue buttor	٦.
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 Experie	ence?		
In some cases, a men over with an incorrec	mber whose work regi at type that shows up (stration type is WTW in at "GA/GR ES".	CalWIN is migrated
Work Registratio	on List		
			Continue
Search Results Summar	v k		Results 1 - 1 of 1
Display by Name: All Y	Type: Fr GA/GR ES ▼	om: To:	View
Name	Type Status	Begin Date Er	Add d Date
0	GA/GR ES Unempl	oyable 08/07/2020	Edit View History
Remove			Add Complete
			Continue
This Type 1 page took 0.62 second	nds to load.		
	Figure 2.2-10 – W	ork Registration List	
How Will This Affect th	ne Case?		

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

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 <u>02/02/2023</u>, enter <u>02/03/2023</u> 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 Experie	ence?		
If you access a page you will need to com the information, you	where there is a blan plete the mandatory t can cancel out of the	k mandatory field for c ïeld to move forward. page.	a converted case, If you do not know
How Will This Affect th	ne 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 select Non-Financial from the Local	tab on the Global navigation bar and navigator.
2.	Click the Time Limits link on the Task Time Limit Month List page.	navigation bar to access the Cash Aid
3.	Click the Edit button on the individu Month Detail page.	al record to access the Cash Aid Time Limit
4.	Update the missing aid code from t	he drop list.
5.	Click the Save and Continue buttor	٦.
CalSA	WS 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 Experie	ence?		
A number of cases c field unchecked.	Case turne: Case turne: Case turne Eligibility Empl. Child Care	alWIN will have the "Ho hoursal ? Task ? Hole & Resources ? Page Ha Resource Fiscal Special Reports	cliest Admin Tools
Customer Information Case Number Contect Non Financial Contact Root Questions Individual Demographi Vital Statistics Household Status Robiocochip Citizenship Pregnancy Deemed Eligibility Residency Other Prog. Assist. Non-Compliance Customer Options Money Migmt Time Limits Purch. and Prep.	Relationship Detail Relationship Detail Relationship Detail Relationship Reason: Select Change Reason: First Individual: Relationship Relative Has Parental Control Begin Date: Verified: Verified: Verified: Relative Last Updated On 12/05/2022 12:00:00 AM B The Type1 page took 141 seconds to lood. Relationship Detail Page	Images Save an New Reported Date: Images Reported Date: Images End Date: Images y: 02 Save an	d Return Cancel
How Will This Affect th	ne Case?		
This is both a required Relative, so the right	d field and one that sh Aid Code is generated	ould be checked for a d and benefits continu	a Responsible e.
What Should You Do?	?		
 Place your cut select Custom Click the Relationship Li 	rsor over the Eligibility t er Information from th tionship link on the Tas st page.	tab on the Global nav e Local navigator. k navigation bar to ac	gation bar and ccess the
P			

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

CalSAWS	Case Number:		a	Journal 🕎 Tasl	ks 🔞 Help [Resources	🚺 Page Mapp	ing 🗺 Imagi	ng 👔 Log Out
	Case Info Eligib	ility Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tool
Customer	Relationsh	ip List							
Information	Number of relation	nships remaining	g to be created	d: 0			Ima	iges	Continue
Case Number:	Search Results	Summary						Result	s 1 - 1 of 1
Person Search	Displ Relat	ay by ionship:		From:		To:			_
Contact	Al Rel	ated	~						View
Root Questions	Person 1	Relationshi	ip	Person 2	Pare	ntal Begin	End		
Vital Statistics	-	~		~	Contr	rol Date	Date	1	
Household Status Relationship	, 81F	Grandparent greats)	t (up to 3	e 81	No	11/16	/2015	Ma	Edit
Citizenship									w mistory
Pregnancy Deemed Eligibility									Add
Residency							_		Complete
Other Prog. Assist. Non-Compliance							Ima	iges	Continue
Customer Options	This Type 1 page too	k 0.50 seconds to k	oad.						
access the edy, respor	Figure Relations nsible rela	2.2-12 hip Det tive on	– Rela tail par the lis	ge, clic t who v	h ip Li s ck the will ge	st Pa e Edit et par	ge buttc cental	on ne) cont	kt to t rol. ng ≌log Qu
access the edy, respor	Figure Relations nsible rela	e 2.2-12 ship Det tive on	– Rela tail pay the lis	ge, clic ge, clic t who v	hip Lis ck the will ge s@hep [Fiscal	st Pa e Edit et par Resources Special	ge buttc cental Page Mapp Reports	on nex cont ing range	kt to t rOl. ng ≧log Que Admin Toot
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customer Information	Figure Relations nsible rela Case Name: Case Info Eligibi Relationshi *- Indicates requ	e 2.2-12 ship Det tive on live on services ip Detail ired fields	– Rela	ge, clic ge, clic t who v) Journal 🕑 Tast	hip Lis ok the will ge riscal	st Pa e Edit et par Resources Special Special	ge buttc rental Reports Save and I	on ne> cont ing range Client Corresp.	Kt t⊙ t rOl. ng ≧rog Our Admin Took Cancel
calSAWS	Figure Relations nsible rela Case Number Case Info Eligibi Relationshi *- Indicates requ Change Reason	e 2.2-12 ship Det tive on	– Rela tail par the list	ge, clic t who v vorrat ? Tast	h ip Li ck the will ge will ge Fiscal	st Pa e Edit et par Resource Special	ge butto rental Page Mapp Reports Save and 1	on nex cont ing Paraga Client Corresp.	kt t⊙ t rOl. ng ≧log Our Admin Took
caccess the eedy, respor	Figure Relations nsible rela Case Number Case Info Eligibi Relationshi *- Indicates requ Change Reason New Change R	e 2.2-12 ship Det tive on live on live services ip Detail ired fields eason: *	– Rela	ge, clic ge, clic t who v Durnal 2 Task Resource Databank	hip Lis ck the will ge riscal	st Pa e Edit et par Resources Special Units nages	ge buttc cental Reports Save and I	on ne» cont ing 🖛 Imagi Client Corresp.	kt to t rol. ng ≧log Our Admin Took Cancel
CalSAWS	Figure Relations nsible relations case Number: Case Info Eligibit Relationshi *- Indicates requ Change Reason New Change Re Select - Change Reason	e 2.2-12 ship Det tive on lity Empl. services ip Detail ired fields eason: *	– Rela	ationsh ge, clic t who v Journal 🕑 Task Resource Databank	hip Lis ck the will ge riscal	st Pag Edit t par Resources Special Mages Mad Date: *	ge buttc rental Reports Save and I	on ne> cont ing nage Client Corresp.	kt to t rOl. ng ≧Log Our Admin Took
CalSAWS	Figure Relations nsible relations isble relations case Nume: Case Info Eligibit Relationshi *- Indicates requ Change Reason New Change R Select - Change Reason	e 2.2-12 ship Det tive on lity services ip Detail ired fields	- Rela	ge, clic t who v I ournal 🕑 Tast Resource Databank	nip Lis ok the will ge rscal rscal	st Pa e Edit et par Resources Special Mages ad Date: *	ge buttc rental Page Mapp Reports Save and I	on ne» cont ng 🔤 Imagi Client Corresp.	kt to t rol. ng ≧log Our Admin Took
CalSAWS	Figure Relations insible relations insible relations case Number: Case Info Eligibit Relationshi *- Indicates requine Change Reason New Change Re Select - Change Reason First Individual	e 2.2-12 ship Det tive on tive on tive services ip Detail red fields eason: * * * * * * * * * * * * * *	- Relation	ationsh ge, clic t who v) Journal © Tast Resource Databank	hip Lis ck the will ge riscal	st Pag Edit E Edit T par Resources Special Nages Ma Date: *	ge buttc rental Reports Save and I	on ne> cont cont Client Corresp. Return	Kt to t rol. ng ≧log Our Admin Toot Cancel
CalSAWS	Figure Relations nsible relations nsible relations Case Number Case Info Eligibit Relationshi *- Indicates requ Change Reason New Change R Select - Change Reason First Individual	e 2.2-12 ship Det tive on lity Empl. services ip Detail ired fields eason: * services in Detail ired fields eason: * Relation eason: * Relation eason: * 	- Relation of the list of the	ationsh ge, clic t who v >ournal ? Tast Resource Databank	nip Lis ck the will ge riscal	st Pay e Edit et par Resources Special ad Date: *	ge butto rental Reports Save and I d Individua on	on ne> cont ing range Client corresp. Return	kt to t rol. ng ≧log Our Admin Took
CalSAWS Customer Information Case Number Contact Root Questions Individual Demographics Vital Statistics Household Status Relationship Citizenship Citixenship Citizenship Citixenship Citixenship Citixenship Cit	Figure Relations ible rela Case Number Case Info Eligibi Relationshi *- Indicates requ Change Reason New Change R Select - Change Reason First Individual	e 2.2-12 ship Det tive on live on live services ip Detail ired fields eason: * :* Relation eletive control	- Relation of the list of the	ationsh ge, clic t who v Durnal 🕑 task Resource Resource Resource	hip Lis ck the will ge rscal	st Pay Edit Et par Resources Special Units ad Date: *	ge butto rental Reports Save and I	cont cont Client Corresp. Return	kt to t rOl. Admin Took Cancel
CalSAWS Customer Information Case Number: Go Person Search Person Search Non Financial Contact Root Questions Individual Demographics Vital Statistics Household Status Relationship Citizenship Pregnancy Deemed Eligibility	Figure Relations isble relations isble relations case Number Case Info Eligibit Relationshi *- Indicates require Change Reason New Change Re Select - Change Reason First Individual Change Reason New Change Reason	e 2.2-12 thip Det tive on live on live services ip Detail red fields eason: * * * Relative control ©	- Relation of the list of the	ationsh ge, clic t who v Dournal C Tast Resource Resource Resource Resource Resource Resource	hip Lis ck the will ge riscal In ported Da	st Pag Edit Edit Resources Special Mages te: Secon	ge butto rental Reports Save and I	on ne> cont Client Client Corresp.	kt to t rOl. Admin Toot Cancel
CalSAWS Customer Information Case Number: Cose Number: Cose Number: Cose Number: Cose Number: Contact Root Questions Individual Demographics Household Status Relationship Citizenship Pregnancy Deemed Eligibility Residency Cother Pron. Assist	Figure Relations nsible relations isble relations case Number Case Info Eligibit Relationshi *- Indicates requ Change Reason New Change R Select - Change Reason First Individual Change Reason New Change R Select - Change Reason First Individual Change Reason New Change R Select - Change Reason First Individual Change Reason Select - Change Reason First Individual Change Reason First Individual Change Reason Select - Change Reason First Individual Change Reason Change Reason	e 2.2-12 ship Det tive on lity Emple services ip Detail ired fields eason: * * Relative control elative control	- Relation	ationsh ge, clic t who v >ournal ? Tast Resource Databank	hip Lis ck the will ge riscal w Reported ported Da	st Pay e Edit et par Resource Special ed Date: *	ge butto rental Reports Save and I	on nex cont ing range Client corresp. Return	kt to t rol. ng ≧log Our Admin Took
CalSAWS Customer Information Customer Information Customer Contact Root Questions Individual Demographics Vital Statistics Household Status Relationship Citizenship Pregnancy Deemed Eligibility Residency Other Prog. Assist. Non-Compliance	Figure Relations ible relations ible relations case Number Case Info Eligibit Relationshi *- Indicates requine Change Reason New Change Reason New Change Reason First Individual Eligibite R Select - Change Reason First Individual Eligibite R Has Parental (Begin Date: * Verified: *	e 2.2-12 ship Det tive on live on live son services ip Detail red fields eason: * eason: * services Relator services view	- Relation of the list of the	ationsh ge, clic t who v) ournal © Task Resource Resource Resource Resource	hip Li: ck the will ge will ge rscal	st Pay Edit Et par Resources Special Mages ad Date: *	ge butto rental Reports Save and d d Individua on	n ne> cont cont Client Corresp.	kt to t rol. Admin Took Cancel

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 Ex	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 Affe	ect the Case?								
These fields do n and the primary when accessed.	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 you select Cu	r cursor over the Eligi stomer Information fr	ibility tab on the G om the Local navig	l obal navigation bar and gator.						
2. Click the Relations	Relationship link on th 1ip List page.	ne Task navigation	bar to access the						
3. Click the common	3. Click the <i>Edit</i> button next to the desired entry that indicates the relationship is common law to access the Relationship Detail page.								
4. Complete	e the State drop list.								
5. Click the	Save and Continue k	outton.							
	Reference								

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

2.2.2.19 ISSUANCE

Page	Name	lssuance Detail	Method	CalSA Name	WS Field (s)	Payee					
What Will You Experience?											
You will not see the <i>Issuance Method</i> drop list if there is no "payee" administrative role added to the GA/GR program.											
	Cal SAWS	Case Name: Case Number:	🛄 Journal 🕎 Ta	sks 🔞 Help 🗐 R	esources 🔟 Page Mapping 🎮	Images 🟴 DCFS Images 🚰 Log Out					
		Case Info Eligibility	Empl. Child Care Services	Resource Databank	Fiscal Special Re Units	eports Client Admin Tools Corresp.					
	Case Summary	Case Summar	у								
	Case Number:	Case Name			County						
	EBT Account Search Application Registration	▶ Companion Cases									
	Case Summary Contact	Display: 08/01/2022 📰 Vie	:w								
	Application Questions Negative Action	▶ CalWORKs									
	New Program New Person	▶ CalFresh									
	EBT Account List	- GA/GR Automate	d Solution								
	Issuance History Auxiliary Authorization List	Worker:	General Relief Program	n Specialist	Primary						
	Expungement History Child Support Collections	Worker ID: Program Status:	Pending		Language: Phone Number:	English					
	Housing Support	Aid Code:			Email:	johndoe@testcalsaws.org					
	Home Visiting	FBU:	0		Payee:	02/22/2022					
	Legacy Case	Name	Pole	Pole Peaco	Status	Status Peason					
	ICT Summary	Name	MEM	KOIE KEdSOI	Pending	Status Keason					
	IAT Summary					View Details					
	MAGI Case Search										
		Figure	e 2.2-14 – Ca	se Sumi	mary Page						

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

	Case Info	Fligibility	Empl.	Child Care	Resource	Fiscal	Special	Reports	Client	Admin Tools
			Services		Databank		Únits		Corresp.	
Case Summary	Issuance Method Detail									
	*- Indicat	es required t	fields					Save and	Return	Cancel
Case Number:	Payee:				Issu	Jance Meth	nod: \star			
Person Search					EBT - Sele	v ect -				
EBT Account Search	Status History Issuance Method				Direct Depos EBT Warrant Status Date	Direct Deposit EBT		Authorized By		
Application Registration				Status		ate	te Reason			
Contact								Save and	Return	Cancel
	-									
	Figu	Jre 2.2	-15 –	Issuand	ce Met	hod D)etail P	age		
Will This Affec	ct the C	Case?								
	ue for	the cc	se.							
efits will not iss										

What Should You Do?

<u>GA/GR</u>

- 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 Experie	ence?						
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.							

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

*- Indicates required	fields			Clos		
Payee:	Issuance Metho Warrant	od: New Issua Warrant	: New Issuance Method: * Warrant			
Status History						
Issuance Method	Status	Status Date	Reason	Authorized By		
Warrant		10/26/2022	ß	<u>43</u>		
				Clos		
This <u>Type 1</u> page took 0.4	5 seconds to load.					
	Figure 0.0.1 /		! D - ! !! D	-		
	Figure 2.2-16 -	- Issuance Meth	oa Defall Pag	le		
w Will This Affec	t the Case?					
ne programs display the wrong issuance method. This also impacts the Direct eposit interface.						
eposit interface.						
posit interface.	00?					
posit interface. nat Should You I update the Issu	Do? ance Method, p	lease complete	the following	steps:		
update the Issu 1. Click the Vi page to op	Do? ance Method, p ew Details buttor en the program	lease complete n within the prog detail page.	the following	g steps: n the Case Summa		
update the Issu 1. Click the Vi page to op 2. Click Issuan Issuance M	Do? Iance Method, p ew Details buttor ien the program ice Method at th ethod Detail pag	lease complete n within the prog detail page. le top of the pro ge.	the following gram block o gram detail p	a steps: In the Case Summar Dage to Open the		
update the Issu 1. Click the Vi page to op 2. Click Issuan Issuance M 3. On the Issua	Do? Iance Method, p ew Details button ien the program ice Method at th ethod Detail pag ance Method De information.	lease complete n within the prog detail page. le top of the pro ge. :tail page, click	the following gram block o gram detail p the Edit butto	g steps: In the Case Summar page to Open the on and update all		

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.												
	e Name: 🛄 Journal 💟	Fasks 🥝 Help 🗐 Resources 间 Page Mapping 🏴 Imag	jes 🏴 DCFS Images 🕍 Log Out									
c	ase Info Eligibility Empl. Child Car Services	e Resource Fiscal Special Report Databank Units	s Client Admin Tools Corresp.									
Person Search EBT Account Search			1 2 Next									
Application Registration Case Summary	Contact Information											
Contact	Person Phone Number	Phone Type E-mail										
Authorized Representative Application Questions		Cell	Edit View History									
Negative Action		Cell	Edit View History									
New Person		Cell	Edit									
EBT Account List		Cell	Clew History Edit									
Auxiliary Authorization List		0.1	View History Edit									
Expungement History Child Support Collections		Cell	View History									
Time Limit Aid Summary		Cell	View History									
Legacy Case	Andrea Secondar programme	Cell	Edit View History									
Confidentiality ICT Summary	()	Cell	Edit									
	Figure 2.2-17 – Co	ntact Summary Page										
How Will This Affect th	ne Case?											
Customore will not be	able to receive tout	massaga patifications										

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.

2.2.2.22 MAILING AND OTHER ADDRESS MISSING IN CALSAWS

Page Name	Contact Su	Jmmary	CalSAWS	S Field Nam	e(s)	Address				
What Will You Experience?										
During conversion Address. The addr	some cases esses that w	will migrate ere in CalV	e over witt /IN don't (nout Home come over	Addr for so	ess or Mailing me cases.				
Contact Summ	ary									
Address Information		Display From:		To:		Continue View Search Address				
Person	Type Ado	lress		Begin Date	End I	Date				
No Data Found										
						Add				
						Search Address				
_										
	Figure	2.2-18 – Co	ntact Sum	mary 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</u> <u>Dates are correct.</u>					
5.	If this results in an edit suggesting d same Begin Date, click Save.	leletion of the old incorrect record with the				
6.	Click Save and Return.					
7.	Make sure the Contact list now sho	ows the correct addresses.				
CalSA	WS 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 <i>Property History</i> section of the Liquid Property Detail page that are missing an amount in the Value column.							

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

CalSAWS	Case Name: Case Number:		🏥 Journal 🕎 Ta	ısks 🔞 Help 🗐 F	esources	🊺 Page Mappin	g 🎮 Images	📕 DCFS Imag	jes <mark>ខ</mark> i Log Out
	Case Info Eligibili	ty Empl. Service	. Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer Information	Liquid Prope	erty De	tail						
Case Number:	*- Indicates require	ed fields					Next	Edit	Close
60	Liquid Property T Checking Account	ype: *				Received 07/29/201	Date: .5		
Person Search Non Financial	Property has bee	n consider	ed by SSA (1	931b only):					
▼ Financial	Financial Details	*			Accoup	t Number:			
Root Questions Income					Account	e Number.			
Tax Household	Owner(s) *					Percentag	e		
Special Needs	Tanta, Treates	-				100.0			
Expenses	Burnett, Torolfree					100.0			
Third Party Liability	Comments:								
Other Health Care	Legacy System Cat	egory: Liqu	id Asset, Type:	Checking Acco	int, Nam	ie:			
IEVS									
Hunt v. Kizer /erifications									
MC 355	Property History	*							
EBT Account List MAGI Verifications	_			From:		To:			View
MAGI Eligibility	Value Stat	us	Usage	Begin Dat	e	End Dat	e	Verified	
Run EDBC Manual EDBC	Avail	able able	Personal	09/09/201	5	03/31/20)16)15	Verified Verified	
Needs	9.83 Avail	able	Personal	08/09/201	3	07/28/20)15	Verified	
ABAWD	Avail	able	Personal	04/14/201	1	08/08/20	013	Verified	
Customer	Case Info Eligibilit	Empl. Service	s Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Information	*- Indicates require	ed fields	ctun				Save and R	teturn	Cancel
Case Number:	Change Reason								
Person Search	New Change Rea	ison: *		Ne	w Repor	ted Date: *			
Non Financial Financial	- Select -	*		Re	ported D	ate:			
Root Questions	Participant Provide	d - Written		09,	09/2015	uter			View
Tax Household	Property Categor	y:		Prop	rty Type				
Property Special Needs	Value: *			Check	ing Accou	Inc			
Expenses	Status: *			Statu	s Reason	o.			
Medicare	Available				5 100.001				
Third Party Liability							~		
Third Party Liability Other Health Care	Usage: * Personal		•				~		
Third Party Liability Other Health Care Health Care Ref. IEVS	Usage: * Personal Begin Date: * 09/09/2015	、	•	End I	ate:		v		
Third Party Liability Other Health Care Health Care Ref. IEVS Hunt v. Kizer	Usage: * Personal Begin Date: * 09/09/2015 End Date Reason:		•	End I 03/31/2 Amou	ate: ⁰¹⁶ nt Recei	ived:	v		
Third Party Liability Other Health Care Health Care Ref. IEVS Hunt v. Kizer Verifications MC 355	Usage: * Personal Begin Date: * 00/09/2015 End Date Reason: Source			End I 03/31/2 Amou	ate: ⁰¹⁶ nt Recei	ived:	v		
Third Party Liability Other Health Care Health Care Ref. IEVS Hunt v. Kizer Verifications MC 355 EBT Account List MACI Verifications	Usage: * Personal Begin Date: * 09/09/2015 End Date Reason: Source	· · ·		End I 03/31/2 Amou	ate: D16 Int Recei	ived: Amount	•		Add
Third Party Liability Other Health Care Health Care Ref. IEVS Hunt v. Kizer Verifications MC 355 EBT Account List MAGI Verifications MAGI Eligibility	Usage: * Personal Begin Date: * Popog2015 End Date Reason: Source	· ·		End I 03/31/2 Amou	ate: ⁰¹⁶ nt Recei	ived: Amount	v		Add
Third Party Liability Other Health Care Health Care Ref. IEVS Hunt v. Kizer Verifications MC 355 EET Account List MAGI Verifications MAGI Eligibility Run EIBBC Manual EDBC	Usage: * Personal Begin Date: * 99992015 End Date Reasons Source	: 	•	End I 03/31/2 Amou	ate: 016 nt Recei	Total Amour	v nt:		Add
Third Party Liability Other Health Care Health Care Ref. IEVS Hunt v. Kizer Venfications MC 355 EDT Account List MAGI Venfications MAGI Eligibility Run EDBC Manual EDBC Needs EDMECA	Usage: * Personal Begin Date: * Googgo205 End Date Reason: Source Verified: *	· · ·	2	End I 03/31/2 Amor	ate: ⁰¹⁶	Total Amour	v v		Add
Third Party Liability Other Health Care Health Care Ref. IEVS Hunt v. Kizer Verifications MC 355 EBT Account List MGI Verifications MAGE Eligibility Run EDBC Manual EDBC Needs Service Arrangements S ADSWID	Verified: * Verified: * Verified: *			End I 03/31/2 Amot	ate: ⁰¹⁶ nt Recei	Total Amoun	v v		Add
Third Party Liability Other Health Care Health Care Ref. IEVS Hunt v. Kitzer Venfications MG 355 EBT Account List MAGI Everifications MAGI Eligibility Run EDBC Manual EDBC Needs Service Arrangements	Verified: * Verified v View	· · · · · · · · · · · · · · · · · · ·		End I	ate: ⁰¹⁶ nt Recei	Total Amount	v v		Add

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

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 Experie	ence?		
You may see migrate date of 1/1/1900. Th instances where Cals legacy system.	ed case records with H is was used as a defau SAWS users did not hav	ousehold Status entrie It date during the initia ve accurate person inf	s that have a begin al CalWIN Go-Live in formation in the

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

	Case Name: Case Number:				🛾 Journal 🕎 1	rasks 🔞 Help	Resource	; 🂓 Page Mapp	ing 🎮 Imag	ing 🕍 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer	Effecti	ve Datii	ng Con	firmatio	n List					
Case Number:	This is the Name	e record yo	u have ado Livi	ded or upda ng in the Ho	ted: ome Status	Begin Date	•	End [Date	
Person Search			Perr Hom	nanently Out ne	of the	12/01/2021				
Contact Root Questions	The syste	m will mak	e correctio	ons to your	additions/u	updates:				
Individual Demographic	The syste	m will adju	ist the effe Livi	ective dates ng in the Ho	of this reco ome Status	ord: Begin Date	2	End [Date	
Household Status			Perr Hom	nanently Out ne	of the	01/01/1900		11/30	/2021	
Citizenship	Click Save	e to continu	ie or Canco	el to undo ti	his action.		9	ave	Cancel	
Deemed Eligibility	This <u>Type 1</u>	page took 0.37	' seconds to lo	ad.						
F	iaure 2	2-21 -	Effec	tive Do	utina C	onfirm	ation	List Pa	ae	
impact to cas	es and	only c	a displ	av issu	e.					
impact to cas	es and	only c	a displ	ay issu	e.					
impact to cas at Should You	es and Do?	only c	a displ	ay issu	e.					
impact to cas at Should You u may adjust th - or post-cutov cord and prese	ies and Do? ne Hous /er perio rve cas	only c ehold od by e histo	statu Statu addir	ay issu s recor ng a ne nd <u>not</u>	e. rd for e ew Hou by edi	each ir Usehold	mpac d Stat	ted inc us entr ting re	dividua y to u cord.	al during pdate t
impact to cas at Should You u may adjust th or post-cutov ord and prese 1. Place your select Cusi	tes and Do? The Hous Ver perio Prve cas Coursor tomer Ir	only c sehold od by se histo over tl nformo	Statu Statu addir pry, ar he Elig ation f	ay issu s recorn ng a ne nd <u>not</u> gibility f	e. rd for e ew Hou by edi tab or e Loco	each ir Usehold ting th In the G	mpac d Stat e exis Iobal gator	ted inc us entr ting re navigo	dividue y to u cord. ation l	al during pdate t par anc
a impact to cas at Should You u may adjust th - or post-cutov cord and prese 1. Place your select Cusi 2. Click the H Household	ses and Do? ne Hous ver perio rve cas cursor tomer Ir ouseho Status	only c sehold od by se histc over tl nformc old Sta List pa	Statu addir ory, ar he Elig ation f tus linl ige.	ay issu s recorn ng a ne nd <u>not</u> gibility - rom th k on th	e. rd for e ew Hou by edi tab or e Loco e Task	each ir Usehold ting th the G al navig	mpac d Stat e exis Iobal gator ation	ted inc us entr ting re navigo bar to	dividue y to u cord. ation f	al during pdate t par anc
 impact to cas at Should You u may adjust the or post-cutove cord and prese 1. Place your select Cusion 2. Click the H Household 3. Click the A 	es and Do? The Hous ver perive rive cas cursor tomer Ir louseho Status .dd but	only c ehold od by se histc over tl nformc old Sta List pa ton to	Statu addir ory, ar he Elig ation f tus linl ige. acce	ay issu s recorn ng a ne nd <u>not</u> gibility - irom th k on th	e. rd for e ew Hou by edi tab or e Loca e Task House	each ir Usehold ting th In the G In avig C navig	mpac d Stat e exis Iobal gator ation	ted inc us entr ting re navigo bar to Detail p	dividuo y to u cord. ation f acce	al during pdate t par anc
 impact to cas at Should You u may adjust the or post-cutor cord and prese 1. Place your select Cuss 2. Click the H Household 3. Click the A 4. Select the remaining button to c 	es and Do? The Hous ver periverve cas cursor tomer In ouseho Status approp fields w continue	only c ehold od by e histc over th formc bld Star List pa ton to priate i vith the e.	Statu addir ory, ar he Elig ation f tus linl ge. acce ndivic e corre	ay issue s record ng a ne ad <u>not</u> gibility from th k on th ess the lual un ect info	e. rd for e ew Hou by edi tab or e Loco e Task House ider th prmatio	each ir Usehold ting th at the G al navig navig hold Si e Nam on, the	mpac d Stat e exis lobal gator ation tatus I ne dro	ted inc us entr ting re- navigo bar to Detail p p list, c k the S	dividue y to u cord. ation l acce acce acce acce	al during pdate t par and ess the omplete and Retu
 impact to cas at Should You u may adjust the or post-cutove ord and prese 1. Place your select Cuss 2. Click the H Household 3. Click the A 4. Select the remaining button to confirm the 	ses and Do? ne Hous ver perive rve cas cursor tomer li ouseho Status dd but approp fields w continue ective D e upda	only c ehold od by se histc over th formc old Sta List pa ton to priate i rith the e. pating te to th	Statu addir ory, ar he Elig ation f tus linl ige. acce ndivic e corre Confc he ca	ay issue s record ng a ne nd <u>not</u> gibility - irom th k on th ess the lual un ect info se reco	e. rd for e ew Hou by edi tab or e Loca e Task House der th prmatic	each ir Usehold ting th n the G al navig navig hold SI e Nam on, the oage,	mpac d Stat e exis Iobal gator ation tatus I ne dro en clic	ted inc us entr ting rea navigo bar to Detail p p list, c k the S	dividue y to u cord. ation f acce acce and ce ave c	al during pdate t par and ess the omplete and Retu

2.2.2.25 OTHER PROGRAM ASSISTANCE ENTRIES IN PENDING STATUS

Page Name	Run EDBC	CalSAWS Field Name(s)	N/A				
What Will You Experie	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.							
	Name: Number:] Journal 😴 Tasks 🍘 Help 📋 Resources 🔟 Page I	Mapping 🎮 Imaging 🚰 Log Out				
C	ase Info Eligibility Empl. Child Care Services	Resource Fiscal Special Report Databank Units	ts Client Admin Tools Corresp.				
Customer InformationRCase Number: CoGoPerson SearchB> Non FinancialFinancial> FinancialVerificationsWC 355IEBT Account ListMAGI VerificationsMAGI VerificationsMAGI EligibilityRun EDBCManual EDBCNeedsCal-LearnService Arrangements> ABAWDEDBC ResultsT	Image: sequired fields enefit Processing Range: egin Month: * End Month: * 20222 • 022022 • Program Status Timely Noti 2 CalWORKS Active 2 CalFresh Active 2 CalFresh Active 2 Medi-Cal Active * Income • • Income • • Other Program Assistance • • Other Program Assistance • • Income • • •	Change Reason Run EDBC w/o Vol cc Exception Reason R cm received:	rifications Cancel				
Figure 2.2	-22 – CalSAWS Screens	hot of EDBC Validatior	n Message				
How Will This Affect t	he Case?						
No impact to the ca	se.						

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 Experie	ence?		
For cases with active Money Management corrected/updated	vendor payments, ac page will need to be as needed.	count numbers that c reviewed for accurac	onverted over to the :y and

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

	Case Number:				ases Wheth			
	Case Info	Eligibility	Empl. Child Care Services	Resource Databank	Fiscal	Special Re Units	oorts Clien Corres	t Admin Toc ip.
Customer Information	Money	Manage	ement List					(
Case Number:	Search Re	sults Sum	mary				Res	Continue
erson Search • Non Financial Contact				Display From:		To:		View
Root Questions Individual Demographics	Vend	lor Name	Vendor Type	Priority	Start Mont	h End Mo	nth	
Vital Statistics	~		Housing	1	08/2022	4		Edit
Relationship			Utilities	2	08/2022			Edit
Pregnancy								View History
Deemed Eligibility Residency	Remove				Pr	ogram: *		V Add
Other Prog. Assist.	1							Complet
Customer Options								Continue
Money Mogent Time Limits								
Money Mingent Time Limits	Figure	2.2-2	3 – Money	Mana	igeme	nt List P	age	
Maney Mingmt Time Limits	Figure	2.2-2	3 – Money	Manc	ageme Tasks @Help [nt List P	age ge Happing 🎮 Ir	naging 🚰 tog Di
Money Magent Time Limits	Figure Case Name: Case Number: Case Info	2.2-2	3 – Money Empl. Child Car	Mance Dournal Resource Databank	ageme Tasks @ Help [Fiscal	nt List P Resources @Pa Special Re Units Re	age ge Mapping 🖭 Ir ports Clien Corres	naging 💕 Log Or t Admin Too IP.
Money Magant Time Limits	Figure Case Name: Case Number: Case Info Money	2.2-2	3 – Money Empl. Child Car Services Child Car ement Detail	Mance Dournal Resource Databank	ageme Tasks @ Help [Fiscal	nt List P Resources OF Par Special Re Units Re	age ge Mapping Pr II ports Clien Corres	naging 💕 Log Or t Admin Too F).
Money Magant Time Limits CalSAWS Customer Information Case Number:	Figure Case Name: Case Number: Case Info Money *- Indicat	2.2-2 Eligibility Y Manag	3 – Money Empl. Child Car Services Child Car ement Detail fields	Manc	ageme Tasks @ Help (Fiscal	nt List P Resources () Pa Special Re Units Re	age ge Mapping 🖛 Ir ports Cien Corres	naging 😭 Log Dr t Admin Too IP. Close
Money Magant Time Limits CalSAWS Customer Information Case Number: Go Person Search * Non Financial	Figure Case Name: Case Number: Case Info Money *- Indicat Vendor N Account I 311	2.2-2. Eligibility 7 Manag res required lame: * Number: *	3 – Money Services Child Car Services Child Child Car Services Child Child Car Services Child Child Child Child Car Services Child Chi	Manc Dournal V Resource Databank	ageme Tasks @ Help @ Fiscal	nt List P Resources () Pa Special Units Re Priority: * 2	age Mapping R tr ports Cien Corres Edit Voucher: No	naging 😭 Log Di t Admin Too IP. Close
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Money Magnit Time Limits CallSAWS Customer Information Case Number: Go Person Search Vital Statistics Household Status Root Questions Individual Demographic Vital Statistics Household Status Relationship Citizenship Pregnancy Decemd Eligibility Residency	Figure	2.2-2. Eligibility r Manag tes required lame: * Number: * : Amount us Redeet	3 – Money Services Child Car ement Detail fields Program: Homeless - Peri sed by EDBC med Amount	Mana Mana Resource Databank Wende Utilitie Display From: Begin Da 08/15/202	ageme	nt List P Aesource @ P Special Re Priority: * 2 To: Date Pay Hom	age Hepping F 1 ports Cirres Edit Voucher: No Code eless - Recipier	naging Clog Or t Admin Too Close (View nt
Money Magnat Time Limits CalSAWS Customer Information Case Number: Go Person Search • Non Financial Contact Root Questions Individual Demographic Viral Statistics Household Status Relationship Citizenship Pregnancy Deemed Eligibility Residency Other Prog. Assist.	Figure Case Name: Case Number: Case Info Money *- Indicat Vendor N Account 311 Payment 250.00	2.2-2. Eligibility Manag tes required tame: * Number: * Amount us Redeet	3 – Money Services Child Car Services Child Car Moment Detail fields Program: Homeless - Per Seed by EDBC	Mance Mance Market Mark	ageme Tasks @ Help @ Fiscal or Type: * 5	nt List P Accources P Accource	age Hagping P I ports Clien Corres Edit Voucher: No Code eless - Recipier Edit	naging 😭 Log O t, Admin Too p, Close View nt Close
Money Magnit Time Limits CallSAWS Customer Information Case Number: Go Person Search • Nor Financial Contact Root Questions Individual Demographic Vital Statistics Household Status Relationship Citizenship Pregnancy Deemed Elipshilty Residency Other Prog. Assist. Non-Compliance Customer Options	Figure	2.2-2. Eligibility 7 Manag tes required lame: * Number: * Camount us Redee	3 – Money Services Child Car ement Detail fields Program: Homeless - Peri sed by EDBC	Mance Mance Market Mark	ageme	nt List P Resources P Resource	age Pe Happûng R 1 ports Clien Corres Edit Voucher: No Code eless - Recipier Edit	naging 😰 Log Or t. Admin Too P. Close View nt Close
Money Magnit Time Limits CollSAWS Customer Information Case Number: Go Person Search * Non Financial Contact Root Questions Individual Demographic Vital Statistics Household Status Root Questions Individual Demographic Vital Statistics Household Status Relationship Citizenship Pregnancy Decemd Eligibility Residency Other Prog. Assist. Non-Compliance Customer Options Money Magnt	Figure	2.2-2. Eligibility Manag tes required iame: * Number: *	3 – Money Services Child Car ement Detail fields Program: Homeless - Peri sed by EDBC	Mana Mana Resource Databank Wende Utilitie Display From: Begin Da 08/15/202	ageme	nt List P Account of the second of the secon	age Happing P I ports Cires Edit Voucher: No Code eless - Recipier Edit	naging Close

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

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 select Non-Financial from the Local	tab on the Global navigation bar and navigator.				
 Select the Money Mgmt. link from th Money Management List page. 	ne Task navigation bar to access the				
3. Click the <i>Edit</i> button for the record Management Detail page.	under review to access the Money				
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	operty History etail CalSAWS Field Name(s)					
What Will You Experie	ence?						
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 Source History area. earned income tax c	section to specifically Examples are SSI/SSA i credit, and others.	enter exempt resource retro payments, auton	e amounts in the natic deposit,				

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

CalSAWS	Case Name: Case Number:	🚺 Journal 💟 Ta	ska 🞯 Help 🏢 R	Resources 🚺	Page Mappin	g 🎦 Images	DCFS Imag	es 🚰 Log Out
	Case Info Eligibility	Empl. Child Care Services	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer	Property Histor	ry Detail						
Information	*- Indicates required fie	elds			(Save and	Return	Cancel
Case Numberi Go	Change Reason							
Person Search	New Change Reason		N	ew Repor	ted Date: *			
Non Financial	Participant Provided - Written	v	07	7/01/2022				
* Financial	Change Reason:		Re	eported D	ate:			
Root Questions	Participant Provided - \	Written	07	7/01/2022				View
Income The Mourahold	Property Category		Prop	werty Turn				
Property	Liquid		Other	r Liquid Pr	operty			
Special Needs	Value: *							
Expenses	4.000.00							
Medicare	Status: *		State	us Reaso	n:			
Third Party Liability	(Avaiable V					~		
Other Health Care	Personal	~						
Health Care Ref.	Begin Date: *		End	Date:				
IEVS	03/01/2022							
Hunt v. Kizer	End Date Reason:		Amo	unt Rece	ived:			
Verifications	V							
MC 355	Source			3	Amount			
EBT Account List	SSI SSP SSA Retroactive Pay	mert 🗸 🚺			4.000.00	22		
MAGE Verhications	Automatic Deposit							Add
Run EDBC	Child's Exempt Earnings Disaster Relief							
Manual EDBC	Earned Income Tax Credit Educational Loans - Non Neer	d Based			Total Amo	unt:		
Needs	Government Relocation Paym Indian Land Lease/Tribal	wet.			4,000.00			
Service Arrangements	Loan Requiring Repayment Native Alaskan Payment							
► ABAWD	Ricky Ray Hemophila Funds SSI/SSI/SSA Retroactive Pay	ymerit						
EDBC Results	Victim's Compensation Payme Victims of Crime Payment	ent			0	Same and	Return	Cancel
					<u> </u>	Save and	Keturn	Cancer
								_
-								
	Figure 2.2-	25 – Prope	erty Hist	lory I	Detail	Page		
/ill This Affect	the Case?							
v may be im	pacted due	to exemp	t resour	rce h	peina	used	for de	termir
			103001		, sing	0300		

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 Experie	ence?					
The Support Questionnaire page is missing parentage status for select individuals. The parentage status for each child should be labelled according to parentage.						

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



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 Experie	What Will You Experience?							
If you access a page you will need to com the information, you	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 th	ne Case?							
These fields do not he and the primary imp when accessed.	ave an impact on eligi act is limited to additic	bility, authorization, or onal data being updat	benefit issuance ed on the page					
What Should You Do	?							
 Place your cu select Non-Fin 	rsor over the Eligibility t ancial from the Local	ab on the Global navi navigator.	gation bar and					
2. Click the Emp Employment I	 Click the Employment link on the Task navigation bar to access the Employment Detail page. 							
3. Click the Edit	t button.							
4. Update the de	desired job title.							
5. Click the Save	and Continue button							
CalSAWS Source/Ref	erence	N/A						

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

2.2.3.2 BARRIERS LIST



- 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 Name(s)	Field	Experier	nce
What Will You Exp	erience?					
Some of the entrie "[null] Code not lis in this field.	s in the Experie ted." The field s	nce colun specifies th	nn of the Sk ne number	tills List pag of months,	ge may in /years of e	dicate experience
Cal SAWS	ase Name: ase Number:	🁥 Journal 🕎 Tasks	5 🔞 Help 📄 Resources	📜 Page Mapping 💌 In	nages 💌 DCFS Image	s 🚰 Log Out
	Case Info Eligibility Em Serv	pl. Child Care	Resource Fiscal Databank	Special Repo Units	orts Client Corresp.	Admin Tools
Case Summary	Skills List					
Case Number: Go Person Search	*- Indicates required fields			Display by Name: All	View History	Edit
Case Summary	Search Results Summary				Results	1 - 2 of 2
Contact	Category 🕸	Name 🍀		Type 🏶 🛛 Exp	oerience 🛞	
WTW	▼				III Codo pot listad	
WTW 90-Day	Technical/Professional	THE OWNER		Engineer [nu	II] Code not listed	
Family Stabilization				L'II	1	
Employment						Edit
Assessment Results						
Degrees Licenses	This <u>Type 1</u> page took 7.76 second	s to load.				
SIP						
Needs						
Skills						
Strengths						
Test Scores						
Goals						
	Figur	e 2.2-28 –	Skills List Po	age		

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

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 Experi	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.							
Cal SAWS	Name: Dournal 💟 Tas	sks 🥹 Help 📋 Resources 🔟 Page Mapping 🎮 In	nages 🟴 DCFS Images 🕜 Log Out				
Case Summary	e Info Eligibility Empl. Child Care Services Summary	Resource Fiscal Special Repo Databank Units	orts Client Admin Tools Corresp.				
Case Number:	ase Name	County Placer	Ч				
Person Search Case Summary Contact Authorized Representative Auxiliary Authorization List Expungement History	splay: 10112022 III View CalWORKs						
Linkages General Ledger Valuable History Point Of Service Case Copy List	Worker: Worker ID: Program Status: Pendi FBU: 1	Primary Applicant/Recipient: Language: Phone Number: Email: Program Begins on: Sanction Effective Month:					
	Name Role MEM	Role Reason Status Pending	Status Reason View Details				
Figure 2.2-29 – Case Summary Page							
How Will This Affect	he Case?						
These cases will con individual in WTW wa	tinue to show as pendi ork until employment se	ng and may delay the ervices are notified.	participation of the				

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 Experie	ence?					
The process for calcu between CalWIN and monthly, weekly, or c captured in weekly ir	ulating scheduled hou d CalSAWS. In CalWIN, daily increments. In Co ncrements.	rs for Employment Serv , scheduled hours may alSAWS, scheduled hou	ices is different be captured in urs may only be			
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 s activities and only th	scheduled hours are st e frequency has chan	ill captured for employ ged.	vment services			

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
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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 Paye	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							

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

Page Name	 Kin-Gap Case Summary AAP Case Summary Foster Care Case Summary 	CalSAWS Field Name(s)	Payee/ Addresses		
What Will Yo	ou Experience?				
The Payee's mailing address is not listed on the Foster Care Resource Detail page and cannot be determined as the Payee's address is missing.					
How Will This Affect the Case?					
Monthly benefits will be skipped because the Payee's mailing address cannot be determined.					
What Should You Do?					
 Update the Payee Mailing Address in the Foster Care Resource Detail Page. To fix this issue PRIOR to running EDBC: Obtain the correct Payee Mailing Address. On the Foster Care Resource Detail page click on the Add Address button. On the Address Detail page select Address Type (s). On the Address Line 1 and Address Line 2 enter Payee Mailing Address. Enter City, State and Zip Code. Select Country from drop down. Click Submit button. Click Save button. Confirm Payee Mailing address was added. Click Close button. 					
CalSAWS Source/Reference CA-255310					
2.2.4.4 AUTHORIZED REPRESENTATIVE ADDRESS MISSING

Page Name		Authorized Representative Details	CalSAWS Field Name(s)	Address Information
What Will You	Experie	ence?		
The Authorized	d Repre	esentative Detail page	e displays a blank Auth	orized Rep address
9	ise Number: 188R)	64 🛶 🖵	· · · ·	
3	Case Info Eli	gibility Empl. Child Care Resource Services Databank	Fiscal Special Reports Client Units Corresp.	Admin Tools
	Authorize	ed Representative Detail		
	 Indicates re 	equired fields	Edit	Close
	Type: Resource			
	Resource: Project		Resource ID: 2899679991	
	Use Resource Yes	Address:		
l i	Address Info	ormation \$		
	Туре	Address Begin Dat	te End Date	
	Contact Info	rmation ontact Information		
	E-mail Addr	ess:	and the second second	
	Phone Num (562)310-	ext. 0	Phone Type Main	
	Addition: Name	al Contact Phone Number	Phone Email Address Type	
ļ	Program Inf	ormation 🛠		
	Program Ty	pe Begin Date	End Date	
	Medi-Cal	03/22/2021		
			Edit	Close
	This Type 1 page	took 0.28 seconds to load.		
L				
	Figur	e 2.2-30 – Authorized	Representative Detail	page
How Will This A	Affect th	ne Case?		
The Authorized	d Repre	esentative will not rece	eive any corresponder	nce.

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

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	Arge Name Foster Care CalSAWS Field Is payment Placement Authority					
What Will You Experience?						
The response to the c	question Is payment to	eligible facility is not lo	baded			
Did the child live w months prior to the been eligible for Ai Home of linkage (N Does the child mee JA2/SAWS 2 or FC Was the child recei If Yes, enter CalWO Is there sufficient i What type of Depri Assistance Unit Siz Net countable inco Net countable prop Is the child in an e Will payment be m	<pre>/ith parent/relative from whom removed e month of petition / voluntary placemen FDC had application been made? (POEM Name and Relationship): * et all general AFDC-FC eligibility requiren 2? * iving CalWORKs benefits in the month of DRKs case number: information to make a linkage determina ivation existed in the month of petition? ete: * me in the month of petition / voluntary p perty in the month of petition / voluntary ligible facility? * ivide to an eligible facility? *</pre>	within any of the previous 6 at agreement and would have determination): * nents as established on the petition? tion? * * placement agreement: *	Yes Yes Yes S Yes			
Last Updated On 01	Last Updated On 01/08/2023 11:43:40 PM By: 253296 Generate Form Edit Close					
This Type 1 page took 0.27 seconds to load. Figure 2.2-31 - Foster Care Placement Authority						
How Will This Affect th	ne Case?					
There is no impact to	eligibility					

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

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, so program is approved	ome AAP records have d.	e an end date filled in	although the			
Negative Action New Program New Person Hide Person EET Account List Issuance History Auxiliary Authorization List Expungement History Child Support Collections	ull Case Review is required before EDB uide for Instructions on how to procee Case Flags	IC is run and authorized. Please refer d. Hismatch Programs: AAP.	to the Manual Case Review			
Time Limit Aid Summary Case Flag Legacy Case Confidentiality LCT Summary LAT Summary MAGE Case Search Customer Contact History SB 87 Invoice History Linkages	Worker: Worker ID: Program Status: Active RE Due Month: 07/2023 Re-Ex Aid Code: 03 - AAP-Fed FBU: 0	Primary Applicant/Recipient: Language: Phone Number: Email: Payee: Additional Correspond Recipient: Application Date: Dual Agency - RC:	ence 08/01/2005			
General Ledger Valuable History	Name	Role Role Reason Statu MEM Active	s Status Reason			

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

CON9	City City	Services	Databank	Units	Corresp.	
Customer Information	AAP Sum	mary List				
Case Number:	Search Result	s Summary			Results 1	- 1 of 1
Go Berroo Search	Child Name:					
Non Financial			Display			
Financial			From:	To:		View
AAP Summary						_
AAP Placement			and a second			Add
Verifications	• Туре	Begin i	Date End Da	te		_
EBT Account List	O Regular	08/01/2	005 12/31/2	021		Edit
MAGI Verifications						-
MAGI Eligibility Run EDBC	Kemove	and \$ 22 month in land				NOG
Manual EDBC	THIS INDE I PAGE 1	pok 0.37 seconds to load.				
Service Arrangements	Fig	jure 2.2-32 –	AAP Summary	List Page		
ow Will This Affe	Fig ect the Ca	jure 2.2-32 – se?	AAP Summary	List Page		
ow Will This Affe ne AAP Summa doption Assista	Fig ect the Ca any record s ince progr	j ure 2.2-32 – se? should have am.	AAP Summary no end date fo	List Page or cases Ap	proved fo	r the
Iow Will This Affe he AAP Summa doption Assista	Fig ect the Ca ary record s ince progr J Do?	se? should have am.	AAP Summary no end date fo	List Page or cases Ap	proved fo	r the
ABAND AB	Fig ect the Ca ance progr DO? ate to AAP () to edit th	se? should have am. Summary D he End Date	AAP Summary no end date fo etail page (Elig or add a new	List Page or cases Ap gibility ► Cu record, if a	proved fo ustomer Inf ppropriate	r the

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 Experie	ence?		

Cal**SAWS Implementation Support Services** Go-Live Packet (GLP) – What I Need to Act On

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.

Santa Barbara CON9 Customer Information Case Number: Go Son Search	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special			
Customer Information	Rate D	etail					Units	Reports	Client Corresp.	Admin Tools
Case Number:	*- Indicate									
Case Number:		es required	fields				(Save and	Return	Cancel
SOR Search	• Lev	el of Care	A Rate ca	nnot have a	Level of Ca	are of LOC	2, LOC 3, oi	LOC 4 whi	le the Hon	ne Approval
ton Financial		reense stu	tus is cine	denet opp	or un					
inancial	Child Nan	ne:								
oster Care	Castilleja,	Noah 1M								
facement Authority	Type: *		5							
hild Placement	Basic Rat	e: *	5					Le	evel of Car	e: *
te-Evaluation	Level of Care	~							0C 2	~
lacement Verification	Begin Da	te: * End	Date:							
ermanency Plan Court	06/01/2023			-						
Inder							1	Save and	Return	Cancel
ifications	_									
355	This Type 1	page took 0.28	seconds to lo	Nad.						
Will This Affe	ect th <u>e</u>	Fi Case?	gure 2	2.2-33 –	Rate D	etail P	age			
vill prevent t	the cor	rect rc	ite froi	n being	g issued	J.				
t Should You	Do?									
ace the exis	ting Cl dd the	nild Plc correc	iceme	ent reco	ord with	a nev	v one f	or the s	same	date

2.2.4.8 AAP PAYEE DOES NOT MATCH

Page Name	AAP Case SummaryAAP Placement Detail	CalSAWS Field Name(s)	Payee		
What Will Yo	ou Experience?				
The Payee Placement	listed in the AAP Case Summa Detail page.	ary does not match the Pa	yee on the AAP		
Worl Worl Prog RE D Aid C FBU:	ker: ker ID: ram Status: Active Pue Month: 12/2022 Re-Evaluate Code: 03 - AAP-Fed : 0 Incorrect Payee is Reflected	Primary Applicant/Recipient: Language: E Phone Number: Email: Payee: E Additional Correspondence Recipient: Application Date: 1 Dual Agency - RC:	nglish abian 1/29/2005		
	Figure 2.2-34 – AA	P Case Summary Page			
	Placement Detail				
*- Indic	ates required fields		Edit Close		
Child's Placem Adoptivi Initial Begin I 03/01/2	Name: * 43 Hent Type: * e Homes Agreement Sign Date: * Date: * End Date: 2010	Placement Name/Payee: * Maria Adoption Finalization Date:			
Figure 2.2-35 – AAP Placement Detail Page					
How Will Thi	is Affect the Case?				
When EDBC who is not c	C runs, it will erroneously requir a payee.	e recovery of past payme	nts from someone		

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

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 activ reports not in the "F page, EDBC canno	e CalWORKs and/or Reviewed – Ready to t be accepted, and	CalFresh programs with p Run" status on the Custo a validation message wil	previous SAR 7 mer Reporting List II display.		
CalSAWS 🚟	Name: Dournal	🛛 Tasks 🛞 Help 🗐 Resources 🚺 Page Mapping 🎮 I	mages 麗 DCFS Images 🥁 Log Out		
0	ase Info Eligibility Empl. Child	are Resource Fiscal Special Rep Databank Units	orts Client Admin Tools Corresp.		
Reporting C	ustomer Reporting List				
Case Number:	earch Results Summary Display Di ype: Na	splay me: From: To	Results 1 - 4 of 4		
Person Search Customer Reporting	v) (A		View		
	Type Name Sul Mo	mit Program Status ith	Status Date		
1	SAR.7 05/	2021 CW Reviewed- Ready to Run	EDBC 05/11/2021		
	his <u>Type 1</u> page took 0.53 seconds to load.				
	Figure 2.2-36 – C	ustomer Reporting List			
How Will This Affect	the Case?				
You need to run a r	manual EDBC to clea	r these previous SAR 7 ar	nd/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 Expe	rience?					
You will see conver program that was only for CalWORKs	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 affec in the workload inv	t eligibility or issuan rentory.	ce but continues	to show as an active program			
What Should You D	0?					
RCA program need	ds to be discontinue	ed.				
 Place your of select Case 	cursor over the Eligil Summary from the	bility tab on the C Local navigator.	Global navigation bar and			
2. Click the Ne Negative Ac	 Click the Negative Action link on the Task navigation bar to access the Negative Action Detail page. 					
3. Confirm tha next to the F	Confirm that the correct benefit month has been chosen and check the box next to the RCA program box.					
4. Select the a click the Rui	 Select the appropriate Negative Action reason from the drop list menu and click the Run EDBC button. 					
5. Click the pro click the Ac	ogram link. Review cept button.	the EDBC results o	and the determination, then			
6. Click the Sa	ve and Continue b	utton.				
CalSAWS Source/R	eference	CA-240092				

2.2.5.3 MCAP/APTC DISCONTINUANCE

Page Name	Case Summary	CalSAWS Field Name(s)	Aid Code		
What Will You Experi	ence?				
You will see MCAP a Medi-Cal program of Case Na Case Search Customer Contact History Linkages Case Copy List	nd/or APTC for Medi-C iid codes.	Cal program even thou ks (2) Help (1) Resources (1) Page Mapping (2) (2) Resource Fiscal Special (2) Resource Primary Applicant/Recipient: Language: Phone Number: Email: Payee: Authorized Representative(s) Application Date: ed Medi-Cal Type Role Role Reason MEM n # SOC/Premium CEC end date MEM	agh they are not		
	Figure 2.2-37 – Co	ise Summary Page			
How Will This Affect t	he Case?				
These aid codes will	These aid codes will show as active until EDBC is run. No other impact to case.				
What Should You Do	?				
When EDBC is run the	ese programs will disco	ontinue.			

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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 <i>Run Reason</i> 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.					

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

	Case Info Eligibility E	mpl. Child Care Resou vices Databi	ce Fiscal nk	Special Units	Reports	Client Corresp.	Admin Tool			
Customer	Individual Demo	graphics Detail								
Information	*- Indicates required fields					Edit	Close			
Case Number:	Name									
Person Search	Last Name: *	First Name: *		Middl	e Name/Ir	itial:				
▼ Non Financial										
Contact	Maiden Name:	Suffix:		Verifi	ed: *					
Root Questions	s			VICH						
Vital Statistics	SSN Status	turne har an								
Household Status	Current Social Security r	umber:								
Citizenship	SSN Verification	Status	Begin Da	te	End	Date				
Pregnancy	No Data Found									
Deemed Eligibility										
Residency Other Brog. Assist										
Non-Compliance	A Number:									
Customer Options	Sufficient Info for CIN:	*		CIN:						
Money Mngmt	Marital Status:			Cend	or: *					
Purch. and Prep.	Never Married			Femal	e					
Immunizations	Date of Birth:			Verifi	ed: *					
School Attend.				Pendir	Ig View					
Degrees Licenses	United States			Verifi Pendir	ed: * ng View					
Striker	Is this person Hispanic	or			_					
Unempl. Depriv.	Latino? * Unknown									
Fig Customer Information Case Number: 60 Person Search Von Financial Contact Root Questions	Vital Statistics Do *- Indicates required fields Name: * 7F Was this person born in No Yes	dividual Dem etail a US State/Territory?:	Adopted:		tail Pc	save	Cancel			
Individual Demographics Vital Statistics Household Status	Birth Certificate Informa	Household Status Birth Certificate Information Figure 2.2-39 – Vital Statistics Detail Page								
Individual Demographic Vital Statistics Household Status	Birth Certificate Informa	9 – Vital Stati	stics De	tail Pa	ge					
Individual Demographic Vital Statistics Household Status	Birth Certificate Informa Figure 2.2-3 the Case?	9 – Vital Stati	stics De	tail Pa	ge					

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

What Should You Do?

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

If the person was born in the United States

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

CalSAWS Source/Reference

CA-255210

2.2.5.5 CITIZEN/ID EXEMPT REASONS NOT REFLECTING CORRECTLY

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

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



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."

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



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			🔝 Journal 🖾 Ti	asks 🛞 Help 🗐	Resources 🊺 Page	Mapping 🎮 Ima	ages 🚰 Log Out
Santa Barbara BATPERF	Case Info Eligibility	Empl. Child C Services	ire Resource Databank	Fiscal	Special Report Units	s Client Corresp.	Admin Tools
Customer Information	Verification L *- Indicates required Status: * Pending Search Results Sur Search Results Sur Vital Statistics US Citizenship Vital Statistics Identity Generate Form Appointment This Toge 1 page took 0.3	A seconds to load.	▼ Fro	m: Extensio Date	To:	Postpone (Verify) (V Postpone (Verify) (V	Continue View Its 1 - 2 of 2 Add Edit /iew History Edit /iew History Add
	Figure 2	2.2-42 – Ve	ərificatic	ons List	Page		
Will This Affect th	Figure 2 e Case?	2.2-42 – Vo	erificatio	ons List	Page		
Will This Affect th Verification List po rd for Vital Statist	Figure 2 e Case? age may d ics for the c	2.2-42 – Vo isplay an child	erificatio	ons List ate his	Page torical F	endinę	g Veril
Will This Affect th Verification List po rd for Vital Statist	Figure 2 e Case? age may d ics for the c	2 .2-42 – V é isplay an child	∍rificatic inaccur	ons List ate his	Page torical P	ending	g Verif
Will This Affect th Verification List po rd for Vital Statisti t Should You Do? o the Vital Statisti npt due to Medi-	Figure 2 e Case? age may d ics for the c cs page ar Cal app sig	2.2-42 – Va isplay an child nd update on by Pare	e the ex	ons List ate his emptic irdian.	Page torical P	ending on for t	g Verif he chi
Will This Affect th Verification List po rd for Vital Statist t Should You Do? o the Vital Statisti npt due to Medi-	Figure 2 e Case? age may d ics for the c cs page ar Cal app sig	2.2-42 – Va isplay an child nd update gn by Pare	e the ex	ons List ate his emptic irdian.	Page torical P	ending n for t	g Verif he chi
Will This Affect th Verification List poor ord for Vital Statist t Should You Do? o the Vital Statisti npt due to Medi-o	Figure 2 The Case? Tage may d tics for the c tics page and Cal app sign tistics record	2.2-42 – Va isplay an child nd update on by Pare	e the ex nt/Gua	ons List ate his emptic irdian.	Page torical P on reasc	ending n for ti	g Verif he chi

2.2.5.6 SPECIAL CARE INCREMENT CONVERTED WITH OLD AMOUNT

Page Name	•	Kin-GA Kin-GA	NP Rate Sumn NP EDBC Sum	nary Page mary	CalSAV Field Name(:	vs Spe Inc s)	ecial Care rement			
What Will You Experience?										
The Special Care	e Incr	ement	t converted b	out with an	old amo	ount from (CalWIN.			
Cost Vert Cust Inform Case Num Person Search Point Financial Vinne Financial Vinne Financial Vinne Case Summary Rate Summ Non-Minor I Vertfications MC 355 EBT Account I Run EDBC Manual EDBC Needs Service Arran P ABAWD EDBC Results	AWS burger omer mation ber: Go ber: Go ber Go ber Go co co co co co co co co co c	Case Name: Case Number: 18 Case Info Child's Nat Child's Nat Rate Lis Type Standard: V Infant S Infant Na No Data F	Eligibility Services Child P Rate Summary me: * 10M State Rate State Rate Supplement ound Care Increment Type Social Worker Authorized	Care Resource F Databank F Level of Care Begin Date Begin Date 164.00	Nelp Resources scal Special Units Begin Date 06/01/2014 Begin Date 05/30/2018	Page Mapping In In Reports Corresp End Date	Edit Edit Edit Edit Edit Edit Edit			
		Remove	Social Worker Authorized	0.00	08/17/2014	C	/Iew History Add			
	I	Figure	2.2-43 – Kin-(GAP Rate S	ummary	Page				

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

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin 1
Kin-GAP	Budget						Reg	jular	
Unearneo	Income						\$		0.00
Unearneo	Income Dis	regards					-		0.00
Net Unea	rned Income						=		0.00
Earned Ir	ncome						\$		0.00
Earned Ir	ncome Disreg	jards					-		0.00
Net Earne	ed Income						=		0.00
Total Net	Nonexempt	Income					\$		0.00
Rate Type	2						Sta	andard Stat	e Rate
Basic Rat	e Code								
Level of (Care								
Foster Ca	re Basic Rate	2					\$		1,023.00
Special C	are Increme	nt					+		0.00
Total Net	Nonexempt	Income					-		0.00
Potential	Grant						=		1,286.00

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.

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

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

Page Name		Other Program Assistance Detail	CalSAV Name(VS Field s)	SSI/SSP End Date					
What Will Yo	What Will You Experience?									
For some co	For some converted cases, the SSI/SSP record shows an incorrect End Date.									
How Will This	s Affect th	ne Case?								
This can imp SSI/SSP date	This can impact the eligibility determination if EDBC is run for a month with incorrect SSI/SSP data.									
What Should	l You Do	?								
1. Place selec	 Place your cursor over the Eligibility tab on the Global navigation bar and select Non-Financial from the Local navigator. 									
2. Click Progr	the Othe am Assis	er Prog Assist link on the tance Detail page.	e Task no	avigation bar 1	o access the Other					
3. Click	the Edit I	outton.								
4. Oper	n the SSI/S	SSP record.								
5. Manı prope	5. Manually update the End Dates on the Other Program Assistance page to the proper date value.									
6. Click	6. Click the Save and Continue button.									
7. Repe	at the pr	ocess for all other acti	ve SSI/SS	SP case persor	ns.					
CalSAWS So	urce/Ref	erence		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
-----------	---------------	--------------------------	--

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

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?							
 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.								

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

	wawawhy Link							
	• Indicates required field	S				Images	Continue	
	• Root Questions							
S	Search Results Summa	γ				Re	esults 1 - 4 of 4	
D	Display By Property Category:		Display From:		То:			
Ø	All						View	
10	Owner	Туре	Descriptio	n Value	Begin Date	End Date		
	-	Automobilo	∼		♥		Edit	
		Automobile	2007 Mildii	8,300.00	03/10/2014		View History	
		Figure 2	2.2-45 – Pr	operty Li	st Page			
low W	ow Will This Affect the Case?							
'ehicle an pe	es not end-date otentially cause	ed are count an individuc	ed in Age al to exce	ed, Blind, ed the p	or Disabl rogram p	ed (ABD) property li	budgets, and mit.	
/hat S	Should You Do?							
a vehicle end-dated in CalWIN convert to CalSAWS with no end-date, follow the elow steps to end-date the vehicle:								
1.	Go to Property	List page.						
2.	2. Click the hyperlink for the vehicle that should be end-dated							
3.	3 Click the hyperlink at bottom of page for the value that is not end-dated							
J.	4 Enter the appropriate and date							
- T. 5	4. Enter the appropriate end date.							
ວ. ,								
6.	RUN EDBC to er	isure vehicle	is no long	ger being	g counted	J.		
alSA	WS Source/Refe	rence		CA-25625	51			

2.2.5.10 PROPERTY COUNTING LESS IN BUDGET

Page Name	Liquid Property Detail	CalSAWS Field Name(s)	N/A				
What Will You Experie	ence?						
Property with a single up at less than 100%.	e Owner may have the ase Info Eligibility Empl. Child Care iquid Property Detail t- Indicates required fields iquid Property Type: * Savings Account Property has been considered by SSA (19 Financial Details Company Name: * Account Num	Ownership percentag Resource Fiscal Special Report Databank Images Next Received Date: 05/25/2012 05/25/2012 Special	e listed may show				
Root Questions Income Tax Household Property Special Needs Expenses Medicare Third Party Liability Other Health Care Health Care	Chase Owner(s) Comments:	w: Percentage 50.0	j16				
IEVS Hunt v. Kizer	Property History 🏶	- Torong - T					
Verifications MC 355 EBT Account List MAGI Verifications MAGI Eligibility	Value Status Usage 34.32 Available Personal 1.150.41 Available Personal	Begin Date End Date 05/25/2012 09/30/2010 05/24/2012 Property Detail Page	Verified Verified				
How Will This Affect the Case?							
No Eligibility Impact.							
What Should You Do?	,						
If you add/update th 1. Place your cur	e record the system w rsor over the Eligibility t	vill tab on the Global navi	igation bar and				

CalSAWS Implementation Support Services Go-Live Packet (GLP) – What I Need to Act On

- 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 documer mandatory State field	nts like driver's license r d is not recorded for th	ecord in vital statistics, ne Identity record.	you will see that the						
U.S. Citizenship Ver	ification								
Document Type on 2A U.S. Public Birth R	File: * ecord recorded before age 5								
Document Number: 480703183									
Citizenship Verified	:*								
Identity Verification	n:								
Document Type: *	corded by U.S. State or Territory with	a photograph							
Document Number:	Lorded by 0.5. State of renntory with								
State/Territory Iss	ued: *								
Identity verified: *									
Verified View									
Fi	gure 2.2-47 – U.S. Citize	enship Verification Pag	je						

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

How Will This Affect the Case?

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

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

What Should You Do?

Update the demographic information for the person, as necessary.

If the person was born in the United States

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

CalSAWS Source/Reference

CA-257653

2.2.5.12 MISSING TERMINATION REASON

Page Name	Employment Detail	CalSAWS Field Name(s)	N/A					
What Will You Experience?								
On the Employment good cause or failure the case is then failir	Detail page when the e reason. In some cas g for reason "Job Ter	e employment is termin ses, the termination rea mination No Good Cau	ated there should be son is missing, and use."					
Case Name: Case Number:	🛄 Journal <table-cell> Tasks 🛞 Help</table-cell>	🗐 Resources 🔟 Page Mapping 🎮 Image	s 🏴 DCFS Images 🕍 Log Ol					
Case Info Eligibility	Empl. Child Care Resourc Services Databan	e Fiscal Special Reports k Units	Client Admin Corresp. Tools					
GA/GR Autom	ated Solution EDBC	Summary						
*- Indicates required	fields	Change Reason	Accept Cancel					
Begin Month	End Month Run Date	Run Status Ac	cepted By					
EDBC Information	05/2022 05/25/202							
Reporting Type Rea Type: Regular Recalculation: No	son:							
Program Configurat	ion							
System Determina	ition							
Aid Code: 90 - GA	General Relief Independent Living	-CNTY						
Program Status:	Denied							
Program Status R	eason: No Eligible Mem							
Note: Overridden in	DOB Role Role	Reason Status Status Reason	n					
1	06/25/1985 MEM	Denied Job Terminatio	n No Good Cause					
		Override	Program Configuration					
Figure 2.2	-48 – GA/GR Automa	ted Solution EDBC Sum	mary Page					
How Will This Affect th	ne Case?							
Eligibility may be Imp	acted in absence of	good cause.						

Cal**SAWS Implementation Support Services** Go-Live Packet (GLP) – What I Need to Act On

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 wit	h reporting type Quar	terly 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 <i>null</i> instead of every 3 months.								
What Should You Do?								
Run EDBC and set Immediacy to Rush for the benefit month being skipped								
CalSAWS Source/Ref	erence	CA-262804						

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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/Ref	erence	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.						

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

	Worker:		Primary Applicant/Recipient:
	Worker ID:	Active	Language:
	RE Due Month:	03/2024 Re-Evaluate	Phone Number:
	Reporting Type:	Semi-Annual Reporting Annually	Email:
	SAR Due Month:	03/2023	r uj cel
	Aid Code:	09 - CalFresh	Application Date:
	Meets ESAP Criteria:	Yes	
	Public Assistance Indicator:	Yes	
	FBU:	0	
	Expedited Service:	Yes	
	Postponed Verif:	No	
	Name	Role Role	Reason Status Status Reason
			ogram Detail Page
_		rigure 2.2-49 – Fi	
v Wi	ll This Affect the C	Case?	
y Wi DBC A/S	II This Affect the C is not run for the AR and fiscal logi	conversion month c will expect a SA	n, the Reporting Type will remain in R7.

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.							

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

	Case Info Eligibility Empl. Child Care Resource Fiscal Special Reports Client Admin Tools Services Databank Units Corresp.
	Homeless Assistance Detail - Permanent
	*- Indicates required fields Edit Close
	Type: Permanent
	Reason: *
	Exception: Former Peridence Uninhabitable
	Prior Misuse of Funds: * No
	Valid Financial Hardship: * No
	CW 42 Received Date: * 08/01/2019
	Rental Agreement Received Date: 08/06/2019
	Last Updated On 12/19/2021 12:00:00 AM By: 31
	Figure 2.2-50 – Homeless Assistance Detail – Permanent
How V	Nill This Affect the Case?
If the inform	Converted Permanent Homeless issuance has already occurred, and the nation is historical, then there is no effect on the case.
What	Should You Do?
lf 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.
3. 4.	Click the link for the Permanent Homeless entry that applies to the current situation to access the Homeless Assistance Detail page. View the begin and end dates. if the end date is BEFORE the begin date, click the <i>Edit</i> button.
3. 4. 5.	Click the link for the Permanent Homeless entry that applies to the current situation to access the Homeless Assistance Detail page. View the begin and end dates. if the end date is BEFORE the begin date, click the <i>Edit</i> button. Update the begin and end dates to the correct information. Confirm the information already present is correct.
3. 4. 5.	Click the link for the Permanent Homeless entry that applies to the current situation to access the Homeless Assistance Detail page. View the begin and end dates. if the end date is BEFORE the begin date, click the <i>Edit</i> button. Update the begin and end dates to the correct information. Confirm the information already present is correct. Click the Save and Return button.
 3. 4. 5. 6. 7 	Click the link for the Permanent Homeless entry that applies to the current situation to access the Homeless Assistance Detail page. View the begin and end dates. if the end date is BEFORE the begin date, click the <i>Edit</i> button. Update the begin and end dates to the correct information. Confirm the information already present is correct. Click the Save and Return button.
3. 4. 5. 6. 7.	Click the link for the Permanent Homeless entry that applies to the current situation to access the Homeless Assistance Detail page. View the begin and end dates. if the end date is BEFORE the begin date, click the <i>Edit</i> button. Update the begin and end dates to the correct information. Confirm the information already present is correct. Click the <i>Save</i> and <i>Return</i> button. Follow process to <i>Run EDBC</i> and issue benefit.

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2.2.6 CHILD CARE

2.2.6.1 NO ASSIGNED WORKER



2.2.6.2 MEMBERS OVER MAX AGE



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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 <i>Permanently Out of the</i> <i>Home</i> .						

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

	Case Info	Eligibility	Empl.	Child Care	Resource	Fiscal	Special	Reports	Clien	Admin Tools
	ouse mile	Englointy	Services	onna oare	Databank	- iocui	Units	Reports	Corres	p.
Customer	Verifica	ation L	ist							
Information	*- Indicate	s required	fields							Continue
Case Number:	Status: *		From	:		To:				
Person Search	Pending	~								View
Non Financial	Search Re	sults Sun	mary						Result	s 1 - 17 of 17
▶ Financial	Scurch Re	Juits Sun	initiar y						Kesun	Add
Verifications	🔳 Туре		Name	Reques	t Due Da	te Post	tponed			
EBT Account List	_			Date		ES				
MAGI Verifications				10/11/0	6 10/21/0	6		Dectaone	Varify	Edit
MAGI Eligibility	Docum	<u>nent</u>		10/11/0	6 10/21/0	0		Postpone	verity	View History
Run EDBC	□ <u>Name</u> /	<u>'Identity</u>		10/11/0	6 10/21/0	6		Postpone	Verify	Edit
Manual EDBC	_									View History
Service Arrangements	- Docum	<u>j/Lao</u> nentation		10/11/0	6 10/21/0	6		Postpone	Verify	View History
▶ ABAWD	Batter	ed Non								Edit
EDBC Results	Citizer	L	Reprint and	10/11/0	6 10/21/0	0		Postpone	verity	View History
	<u>Visa/V</u> <u>Applica</u>	AWA ation		10/11/0	6 10/21/0	6	(Postpone	Verify	Edit View History
	Countr	<u>y of Birth</u>	-	10/11/0	6 10/21/0	6		Postpone	Verify	Edit View History
	Countr	<u>y of Birth</u>		10/11/0	6 10/21/0	6		Postpone	Verify	Edit View History
		Figure	e 2.2-{	53 – Vei	ificatio	on Lis	t Pag	je		
ill This Af <u>fec</u>	t the <u>C</u>	ase?								

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

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.

Update Verification Status

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

CalSAWS Source/Reference

CA-239115

2.2.7.2 PENDING VERIFICATIONS FOR CITIZENSHIP AND ID

Page Name	Vistal Statistics List	N/A				
What Will You Experience?						
You will see a "Pendi List page if there wer records added in Ca	ng" verification status e no Deficit Reduction IWIN.	for converted cases on the Vi Act (DRA) Citizenship and/or	stal Statistics Identity			

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

	SAWS Case Number:			
Case Info Eligibility Empl. Child Ca	re Resource Fiscal Special Reports Client Admin Tools Databank Units Corresp.			
Customer Vital Statistics List				
Case Number: Go Name Citizenshir	Images Continue			
Person Search	Pending			
	View History			
Individual Demographics	Edit View History			
Remove				
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?				
 Place your cursor over the Eligibility tab on the Global navigation bar and select Customer Information from the Local navigator. 				
 Click the Vital Statistics link on the Task navigation bar to access the Vital Statistics List page. 				
 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 cit Country's Verified drop list will display a "P Demographics Detail page.	izenship information in CalWIN, the Birth ending" status on the Individual			
--	--			
Individual Demographics Detail				
*- Indicates required fields	Save and Return Cancel			
A Number:				
Sufficient Info for CIN: *	CIN: Search			
Marital Status:	Gender: *			
Date of Birth:	Verified: *			
Birth Country: *	View Verified: *			
United States 🗸	Pending View			
Figure 2.2-55 – Individual	Demographics Detail Page			
How Will This Affect the Case?				
Birth country records that are not verified determining residency and the scope of b	and left in a pending status will interfere with benefits provided to an applicant/recipient.			
EDBC will not run, and you will receive an country must be verified.	error message indicating that the birth			
What Should You Do?				
1. Place your cursor over the Eligibility select Customer Information from the select	tab on the Global navigation bar and ne Local navigator.			
2. Click the Individual Demographics the Individual Demographics List pe	link on the Task navigation bar to access age.			
3. Click the linked name or the Edit bu Demographics Detail page in View	utton to access the Individual or Edit mode for the chosen individual.			
4. In Edit mode, select the appropriat to the Birth Country drop list.	e value from the Verified drop list adjacent			
5. Click the Save and Return button.				
CalSAWS Source/Reference	CA-247372			

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2.2.7.4 VERIFICATION LIST PENDING INCOME

Page Name	Verifications List	CalSAWS Field Name(s)	N/A
What Will You Experie	ence?		
Verification List page there are no pending	e displays two of the sa g verifications in CalWI	ime income pending r N.	ecord although
How Will This Affect th	ne Case?		
The presence of pen run.	ding verifications may	result in adverse effec	ts during a EDBC
What Should You Do?	?		
The worker should ch verifications manual	eck pending verificati y.	ions in CalWIN and cle	ar the income
CalSAWS Source/Ref	erence	CA-257020	

2.2.7.5 INCORRECT 'PENDING' STATUS ON RESIDENCY DETAIL

Page Name	Residency List	CalSAWS Field Name(s)	Verified
What Will You Experie	ence?		
On the Residency Po • the verified field o • the Verifications L	age under Eligibility->C of the Residency recor .ist will show no pendir	Customer Information-> ds may show Pending ng Residence records.	• Non-Financial: but
How Will This Affect th	ne Case?		
The presence of pen run.	ding verifications may	result in adverse effec	ts during an EDBC
What Should You Do?	?		
A Worker can manuc	ally verify the pending	Residency record:	

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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



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 Experie	What Will You Experience?						
When searching for c indicates it is approve	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 created by another (have an indicator of " County and are not su	yes" for the County Ap itable for use by your (pproved status were County.				

	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Too
Resources	Resou	rce Sea	rch							
source Search	*- Indicat	es required	fields							
tification List	▶ Refine Ye	our Search								
	Search R	esults Sum	imary						Results 1	- 25 of 84
									1	2 <u>3 4 Next</u>
						Add Resourc	e Request	Resource	View Detai	iled Results
	Name		Resource Category	Se Ty	rvice pe	County Approved	Addre	SS	Dista	nce
	`		Drouidor	~	1	<u> </u>				Edit
			Provider							Edit
			School							Edit
			School							Edit
			School							Edit
			School							Edit
			School							Edit

Cal SAWS		Journa	al 🕎 Tasks 🔞 Help	Resources 🏢 🛙	Page Mapping 🏴 Image	es M DCFS Images W Log Out
	Case Info	Eligibility Empl. Chi Services	ild Care Resourc	ce Fiscal Ik	Special Reports Units	: Client Admin Tools Corresp.
Resources	Resourc	e Search				
Resource Search	*- Indicates	required fields				
Notification List	▶ Refine You	r Search				
	Search Res	ults Summary				Results 1 - 25 of 84 1 <u>2 3 4 Next</u>
		-		Add Resource	Request Resource	View Detailed Results
		Category		Approved	Address	Distance
		Provider				Edit
		School				Edit
		School				Edit
		School				Edit
		School				Edit
Figure 2.2 'ill This Affec	2-58 – Ca t the Ca	school School alSAWS Resou	urce Dat	abank R	esource S	Eat Eat Search Page
Figure 2.2 ill This Affec pact to case	2-58 – Co t the Ca e.	school school alSAWS Resou	urce Dat	abank R	esource S	earch Page
Figure 2.2 (ill This Affec pact to case hould You [2-58 – Co t the Ca e. Do?	school school alSAWS Resou	urce Dat	abank R	esource S	EII EII Search Page
Figure 2.2 ill This Affect pact to case hould You I ll need to very ved for Cou- unty Appro o add a new refer to the	2-58 – Co the Ca e. Do? erify resc inty use. ved sec w resour e clean-u	school school alSAWS Resound alSAWS Resound alse?	desired re dresource burce be c it as ap	esult doe esult does e does r longs to proved t ed as pa	es not india not have a another C for the de irt of the R	cate that the a "yes" indico County, and y sired County. DB protocol
Figure 2.2 ill This Affect bact to case hould You I ll need to very ved for Cou- unty Appro o add a new refer to the shed for Co ce Databar	2-58 – Co et the Ca e. Do? erify resc inty use. ved sec w resour e clean-u ounties, w nk Proto	school school alSAWS Resound alSAWS Resound alse? burces if the desired tion, the resound race and mark up instructions which can be col.	desired re dresource burce be cit as ap s provide accesse	abank R esult does e does r longs to proved t ed as pa ed using	es not india not have a another C for the de rt of the R <u>Web Port</u>	cate that the a "yes" indico County, and y sired County. DB protocol al > Protocol

2.2.8.2 MISSING FIELDS HEARING DETAIL PAGE

Page Name	Hearing Detail	CalSAWS Field Name(s)	Hearing Type
What Will You Experie	ence?		
When accessing the from CalWIN, you ma	Hearing Detail page, f ay see the hearing Typ ^{nfng ID:}	for an active hearing t e field is blank. ks @Help 🗃 Resources 🕅 Page Mapping 🎮 Images	hat was converted
	Case Info Eligibility Empl. Child Care Services	Resource Fiscal Special Reports Databank Units	Client Admin Tools Corresp.
Hearings Hearing Search Detail Proceeding Withdrawal Status History Note	Hearing Detail *- Indicates required fields Hearing Id: Case I Person Information 1 Type: * First Name SSN: Address Line 1: *	Number: Hearing Nun e: Last Name: *	Edit Close
	Address Line 2: City: * State: * Phone Information Phone Type Main	ZIP Code: Phone Number	
	Figure 2.2-59 – He	earing Detail Page	
How Will This Affect th	ne Case?		
No impact to the cas	se.		
What Should You Do?	?		
You should update th 1. Place your cu select Hearing	nis record as part of or rsor over the Special U rs from the Local navig	ngoing hearing mainte nits tab on the Global gator.	nance. navigation bar and

- 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



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

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

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

Page	e Name	Distributed Documents Search	CalSAWS Field Name(s)	Search Results Summary					
Wha	t Will You Experie	ence?							
For N throv	NOAs/Forms that wing an error bea Unable	combine multiple doc cause the PDF docume to retrieve PDF file. Please c Please <u>CLICK HER</u>	uments, conversion m ent isn't being pointec ontact the system administra E to continue!	ay result in the link to by every link. tor.					
	Figu	ure 2.2-62 – Unable to I	Figure 2.2-62 – Unable to Retrieve PDF File Message						

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

	Case Info Eligibility	Empl. Child Care Services	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools	
Distributed	Distributed I	Distributed Documents Search							
Distributed Documents	*- Indicates require	* - Iֲמָdicates required fields							
Search Enclosure	Refine Your Search	Refine Your Search Search Results Summary Results 1 - 1 of 1							
	Search Results Su							1 - 1 of 1	
	Date	Document Name	Number	Program	Status	Viewed Vi Service Po	a Self- ortal		
	02/14/2022 12:00 AM	✓ NOA - CW - NC - No Change NOA		✓ CalWORKs	✓ Printed Centrally	▼	(Details	
	Figure 2.2-6	3 – Distribute	d Doci	ument	s Sear	ch Pag	е		
w Will This Affe	ct the Case?)							
	se llserunc	ible to acces		/Form	<u> </u>				
o impact on ca			51107		1				
o impact on ca hat Should You	Do?				1				
o impact on ca hat Should You 10 Options that	Do?	mpted:			I				
hat Should You No Options that	Do? can be atte	mpted:			k on th	ne 2nd	link for	- that	
o impact on ca hat Should You 10 Options that 1. If there is a document	Do? can be atte Second Lini	mpted: < for that doo that way.	cumer	it, clic	k on th	ne 2nd	link for	- that	
hat Should You no Options that 1. If there is a document 2. If there is n	Do? can be atte Second Linl and view it o Second lir	mpted: < for that doo that way. Ik for that do	cumer	nt, use	k on th	ne 2nd eed to	link for	⁻ that it in Co	

2.2.8.5 NO VENDOR INFORMATION

Page Name	Resource Search	source Search CalSAWS Field Name(s)		
What Will You Experie	ence?			
No GA Vendor type	information within the	Resource Search pag	le.	

Case Info	Eligibility	Empl. Ch Services	nild Care Resource Databank	Fiscal	Special Units	Reports	Client Corresp
Resou	rce Sea	rch 🔓					
*- Indicat	es required	fields					
Refine Y	our Search						
Search R	esults Sum	mary					Res
				Add Resource	e Request	Resource	View De
Name		Resource Category	Service Type	County Approved	Addre	SS	Dis
Apartmen	Lane hts	♥ Provider	Housing Services	Yes			
		Figure 2.	2-64 – Resourc	e Search Po	age		
w Will Th	is Affect t	he Case?					
ers are no	ot able to	select app	ropriate Vendo	or information	on.		
nat Shoul	d You Do	?					
u can m appropri	anually a ate place	dd the venc es.	dors in CalSAWS	so that thi	is informa	ition can	be use
1. Plac	e your cu ct Resour	ursor over Re ces from the	source Databo • Local navigat	ank on the or .	Global no	avigation	bar ar
2. On t	he Resou	rce Search	page:				
С	a. Enter t	he approprie	ate search crite	eria.			
k	o. Enter ir	n the Starting	g Address field,	if necessa	γ.		
	Note: 1 office	he Starting / ocation.	Address inform	ation is aut	o-popula	ted with	your
	. Entor o	ı citv name i	in the City field	, if necesso	IV.		
C	. Enter C	,			.,.		

- 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 Experie	ence?		
Validation messages	related to the Beginr	ing Date of Aid and A	pp Date.

Case Info Eligibility S	Empl. Child Care ervices	e Resource Fiscal Databank	Special Reports Units	Client Admin Tools Corresp.
Application Deta	ail			
*- Indicates required field	IS		Save and	Return Cancel
 Form Error - The l (01/06/2022). Change Reason - Form Error - The l 	Beginning Date o Field is required, Application Date	of Aid cannot be before Please enter a value, cannot be before Savio	Savion Date o	f Birth h (01/06/2022).
Program Type:	View Appli	cation:	Change Reas	ion: *
CalWORKs		View		~
Program Application Ir	nformation			
App #:		Source: *	Application Dat	te: *
2 Inter-County Transfer:		Self-Service Portal	12/27/2021	
NO				
Person Information				
Name	DOB	Application Date 😽	Beginning Date of Aid 8	Cash-based Medi-Cal BDA
	10/21/1995	12/27/2021	01/01/2022	
Savion J	01/06/2022	12/27/2021	01/01/2022	
	04/07/2018	12/27/2021	01/01/2022	
	03/18/2017	12/27/2021	01/01/2022	
			Save and	Return Cancel
	Figure 2.2	-65 – Applicatior	n Detail Page	
Will This Affect th	e Case?			
verted cases do	not reflect t	he correct Begin	ning Dates of Ai	d downstream
bility impacts will	occur, such	as incorrect issu	ances of allotme	ents.
t Should You Do?				
t Should You Do? should update th	ie impacted	1 persons beginn	ning date of aid.	
should You Do? should update th . Place your cur Case Summan	ie impactec sor over Cas ⁄ from the Lo	d persons beginn se Info on the GI acal naviagtor.	ning date of aid. I obal navigation	bar and select

- 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
	C/(-200007

2.2.8.7 CUSTOMER APPOINTMENT

Page Name	Customer Appointment Detail	CalSAWS Field Name(s)	N/A
What Will You Experie	ence?		
After conversion, som and a Worker ID that Staff Assigned to a W	ne Customer Appointn does not belong to ar 'orker ID and will displo	nent Records will have ny worker. The system ay no Status Reason.	no status reason will show both No
Although the system changed on the sam the other field.	allows either field to be ne screen and changir	e changed, they cann ng just one results in a v	not both be validation error for

	nemone potun		
*- Indicates required field	ls		Close
Attendees			
Customers 🏶		Attendance	
	56F	Showed	
Workers 🛞			
57LS021600 - No Staff	Assigned		
General Information			
Category: *		Status: *	
Intake Interview		Completed	
Location: *			
Appointment Letter Co	mmontei		
Appointment Letter Co	minents.	Appointment Comments:	
Dates			
Begin Date: *	Begin Time: *	Duration *	
04/12/2022	1.00 PM	Thou So minutes	
			Close
Figur	e 2.2-66– Customer A	ppointment Detail Page	
Will This Affect the	Case?		
kers will be unable	to update Customer	Appointments.	
t Should You Know	?		
t Should You Know	?		
t Should You Know er with elevated se	? ecurity rights would no	eed to update the Worker ID us	sing the e Worker
er with elevated se ce Admin pages to is resolved, a User	? ecurity rights would no assign a valid staff p will then be able to u	eed to update the Worker ID us erson as appropriate. Once the use the [[Edit Attendance]] but	sing the e Worker Iton to ac
er with elevated se ce Admin pages to s is resolved, a User atus Reason and So	? ecurity rights would no assign a valid staff p will then be able to u ave and Close the re	eed to update the Worker ID us erson as appropriate. Once the use the [[Edit Attendance]] but cord.	sing the e Worker Iton to ac
er with elevated se ce Admin pages to is resolved, a User atus Reason and Sc	? ecurity rights would no assign a valid staff p will then be able to u ave and Close the re	eed to update the Worker ID us person as appropriate. Once the use the [[Edit Attendance]] but cord.	sing the e Worker Iton to ac

2.2.8.8 GAGR- NOT ABLE TO FIND RESOURCES FOR MONEY MA	ANAGEMENT
---	-----------

Page Name	Money Management Detail	CalSAWS Field Name(s)	 Board and Care Drug and Alcohol Direct Rent Utilities
What Will You Expe	rience?		
After you select GA Management page or contain the wror	A/ GR Automated Solutio A, fields on the Money N Ang type of data.	n as the program Aanagement Detai	on the Money il page are either empty
Money Mana	gement Detail		
*- Indicates require	d fields Say	ve and Add Another Sav	ve and Return Cancel
Name: *			
Vendor Name: * Select Account Number:	Program: GA/GR Automated Solution	Vendor Type: * Utilities v - Se	ority: * elect- V
Payment Amount	used by EDBC		
Amount E	legin Date End Date	Report Date	Pay Code
No Data Found			
			Add
	Sav	ve and Add Another Sav	ve and Return Cancel
I	igure 2.2-67 – Money N	Nanagement Detai	l Page
How Will This Affect	the Case?		
Users will not be ab EDBC results.	le to select Money Man	agement resource	es which will impact
What Should You Ki	now?		
Users can update to add the physical a From Money Mana	he resources manually f ddress; gement:	or these Money M	anagement types to

- 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 Expe	rience?			

Money Mai	nagement De	tail			
*- Indicates requ	uired fields			Edit Cla	ose
Name: *					
Vendor Name: PUBLIC GUARDIA	* Program AN GA/GR A	n: utomated Solution	Vendor Type: *	Priority: * 1	
Payment Amou	int used by EDBC				
	\$	Display From:	T.	o:	View
Amount	Begin Date	End Date	Report Date	Pav Code	
<u>85.00</u>	10/28/2005	10/31/2005		Undefined	
ast Updated On Money Ma *- Indicates req	01/17/2023 2:27:44 nagement De	PM By: <u>92</u>	ve and Add Another	Edit Cla Save and Return Can	ose
ast Updated On Money Mai *- Indicates req Name: * [- Select - Vendor Name:	01/17/2023 2:27:44 nagement De uired fields	PM By: <u>92</u> etail sa	ve and Add Another	Edit Co Save and Return Can Priority: *	ose
ast Updated On Money Mai *- Indicates req Name: * [- Select Vendor Name: Select Account Numb	01/17/2023 2:27:44 nagement De uired fields * Program GA/GR A	PM By: <u>92</u> etail Sa n: Automated Solution	ve and Add Another	Edit Co Save and Return Can Priority: * - Select - •	ose
ast Updated On Money Mai *- Indicates req Name: * - Select - Vendor Name: Select Account Numb	01/17/2023 2:27:44 nagement De uired fields * Program GA/GR A er: unt used by EDBC	PM By: <u>92</u> etail Sa n: Automated Solution	ve and Add Another	Edit Co Save and Return Can Priority: * • Select - V	ose
ast Updated On Money Mai *- Indicates req Name: * - Select - Vendor Name: Select Account Numb Payment Amou Amount No Data Found	01/17/2023 2:27:44 nagement De uired fields * Program GA/GR A er: Unt used by EDBC Begin Date	PM By: <u>92</u> etail Sa n: Automated Solution End Date	ve and Add Another Vendor Type: * Utilities v	Edit Contentied	ose
ast Updated On Money Mai *- Indicates req Name: * [- Select - Vendor Name: Select Account Numb Payment Amou Amount No Data Found	01/17/2023 2:27:44 nagement De uired fields * Program GA/GR A er: Unt used by EDBC Begin Date	PM By: <u>92</u> etail Sa n: Automated Solution End Date	ve and Add Another Vendor Type: * Utilities Report Date	Edit Co Save and Return Can Priority: * • Select - V Pay Code	ose

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 Experie	ence?		
For some cases, reco example, "IPV" reco IPV" or "IHV" instead	overy accounts are co very accounts have be of "IPV."	nverting with the wron een converted into Co	g cause code. For alSAWS as "Potential

*- Indicates required fields				
View Journal	Edit Void Transfe	r Out 🚺 Terminate	9 Suspend	Close
Recovery Account Numb	er: Recovery Acco Regular	unt Type:	Created By:	
Creation Date: 02/19/2023	Case Number:	*	Case Name:	
LEADER Claim Number: CALWIN CLAIM ID:				
Account Details				
Program Type:	Discovery Date: * 11/03/2017	Assigned To:		
Cause: * Cash - Potential IPV		Cause Date: 11/03/2017		
Reason: * Other		Expiration Da	ite:	
Status: * Active	Status Reason: * Active	Status Date: 11/03/2017		
Is this an ICT: * No	Originating County:	External: No		
Investigations: * None	Fraud Identification Date: 11/03/2017	Due Process 0 11/03/2017	Completed Date:	
Fiç	gure 2.2-69 – Recovery A	Account Detail	Page	
Will This Affect the	e Case?			
correcting the cla also impact fund	ssifications will cause inc ing as Federal reporting	correct recoup will be incorre	oment dollar ar	nounts
It Should You Do?				
n running EDBC, t	he percentage used for covery account. To avoi	recoupments	is determined	by the orkers w

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 Experie	ence?				
Searching for a conv account.	Searching for a converted Recovery Account by Leader Claim fails to return any account.				
How Will This Affect th	ne Case?				
No impact on 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:XXXXX Not using this exact format will result in no results.					
CalSAWS Source/Ref	erence	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 <i>Reminders</i> on the <i>Home Page</i> in CalSAWS only the Case Alerts from CalWIN will show up.			
How Will This Affect the Case?	How Will This Affect the Case?		
No impact on case. But it is a non-trivial c	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 Experie	ence?		
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?			

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

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 ur only.	nsuccessful, try searching with the Name		
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?				

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

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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.
<complex-block><complex-block><complex-block></complex-block></complex-block></complex-block>
How Will This Affect the Case?
What Should You Know?

٦

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



2.2.8.15 BLANK MILITARY/VETERANS LIST PAGE

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

Tulare UAT2	Case Info Eligibili	ty Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer	Military/Ve	terans List	t						
Information							Im	ages	Continue
Go	 Root Questions 								
Person Search ▼ Non Financial									Add
Contact	Name		Туре		Enlistn	nent Date	Dise	charge Dat	e
Individual Demographics	No Data Found								
Vital Statistics							Type:	*	
Relationship	-						Im	lages	Continue
Citizenship	This <u>Type 1</u> page tool	0.34 seconds to lo	ad.						
Deemed Eligibility									
Residency	1								
	Figure	2.2 -72 –	Milita	ry/Vet	erans	List Pa	ge		
How Will This Affe	ct the Case	?							
Military informatic the information in information manu	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 t	to the Militc	ary/Veter	rans Li	st page	Э.				
2. If the reco 'Military/Ve	 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 <i>Name</i> hyperlink or the <i>Edit</i> button to access the Military/Veterans Detail page in View or Edit mode, respectively.									
4. Enter the c	4. Enter the appropriate information.								
5. Click the S	5. Click the Save and Return button.								
CalSAWS Source/	Reference				C	٩-2554	80		

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).

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

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