



**CalWIN ISS**  
**Implementation Support Services**

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

August 07, 2023

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

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## 1 INTRODUCTION

Along with knowing what you need to do, there are several topics you should be aware of about knowledge resources available for CalSAWS and other system-related information. The informational needs can be categorized into four (4) broad categories:

- **Frequently Asked Questions** contains a set of basic questions about specific knowledge needs. Examples include what resources to access various items such as available training, changes to business processes, available resources on awareness items.
- **County Reference Materials** contains a list of various project trainings and other resources that are available for you to access and self-assist with for your informational needs.
- **Key Process Changes** contains a list of common process changes across counties providing highlights of how your existing processes have changed with CalSAWS and where you can access more information about this.
- **User Awareness Items** contains a set of informational topics that outlines behavior of CalSAWS for specific scenarios or for converted cases which are different from expected behavior. The intention of this section is to outline such items only for your awareness as these may not be actionable.

## 2 WHAT DO I NEED TO KNOW?

### 2.1 FREQUENTLY ASKED QUESTIONS

Question	Description
<p><b>What do I do if results in CalSAWS are not per my expectations?</b></p>	<p>Some of the differences you will find are known to CalSAWS already, and System Change Requests (SCRs) have already been documented for future releases. These items can be located in the What Do I Need to Act on Section: <i>GLP &gt; What Do Need to Act On</i></p> <p>Other differences are just that; Differences between CalSAWS and CalWIN that have been identified can be located in the User Awareness Section: <i>0.3 CalWIN ISS_GLP_What I need to know &gt; User Awareness Items</i></p> <p>County-specific changes to process can be located in the Change Discussion Guides (CDGs) and will show the below areas that are different specifically for your County:</p> <ul style="list-style-type: none"> <li>• Changes to process</li> <li>• New functionality</li> <li>• Change of functionality</li> <li>• Changes in terminology</li> <li>• New Process</li> </ul> <p>This information is included as part of <i>0.3 CalWIN ISS_GLP_What I need to know&gt; County Reference Material &gt; Special User&gt; Change Discussion Guide</i></p> <p>While you are looking at the County Reference Materials in Appendix I - you can also find overall frequently asked questions about migration in the Migration FAQ section.</p>
<p><b>Where can I find the information, I was given during training?</b></p>	<p><b>Training/WBT:</b></p> <p>Learners have access to their WBTs, which are interactive courses that challenged learners and provided simulated tasks (kinesthetic learning) that prepared them for classroom training and reinforced learning. This can be accessed via The Learning Management System (LMS) which provides a vast catalog of trainings, reference materials, and Job Aids.</p> <p><b>Targeted Topics:</b></p> <p>Targeted Topic Sessions were conducted to provide Counties a demonstration of current CalSAWS functionality within a specific area of the application based on additional training needs.</p>



Question	Description
	<p><b>Questions &amp; Answers:</b></p> <p>The Q&amp;A Sessions were designed to provide CalWIN Counties a high-level overview of CalSAWS functionality as well as address key topics.</p> <p>Index of available resources and included topics are available as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know&gt;County Reference Material Section&gt;General User&gt;Q&amp;A</i></p> <p><b>Infographics &amp; Newsletters:</b></p> <p>Infographics contain project/system details that integrate ongoing County feedback and newsletters were distributed by Wave to build staff awareness and understanding of the CalSAWS system and project. Newsletters provide pertinent information and integrate ongoing County feedback collected through Change Readiness Surveys, Change Network Champions, County leadership, CalSAWS Regional Managers, and additional project channels.</p> <p>Index of available resources and included topics are available as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know &gt;County Reference Material Section&gt;General User&gt;Infographics &amp; Newsletters</i></p>
<b>As a user responsible for County configurations, what are the key resources available to me to configure CalSAWS?</b>	<p>CalSAWS Configuration Items contain items required by a County Administrator and were used as part of County Prep such as document routing, rates set up, and automated actions.</p> <p>Index of available resources and included topics are available as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know &gt;County Reference Material Section&gt;Special User&gt;CalSAWS Configuration Items</i></p>
<b>Where can I find information on CalSAWS Reports?</b>	<p>This information is included as part of Index of available resources and included topics are available as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know &gt;County Reference Material Section&gt;Special User&gt; Reports and Dashboard</i></p>
<b>As a County POC, where can I find the list of CITs/CRFIs that were published by CalSAWS?</b>	<p>This information can be found in <a href="#">this folder containing all CRFIs and CITs</a></p>
<b>Where can I find more information about the BenefitsCal system?</b>	<p>This information is included as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know &gt; General User&gt; BenefitsCal</i>.</p>

Question	Description
<b>Where do I find the definitions for unfamiliar terms used for CalSAWS?</b>	This information is included as part of Appendix > <i>CalWIN_ISS_Appendix H_CalSAWS Terminology</i>

## 2.2 COUNTY REFERENCE MATERIAL

The County Reference Materials section provides references to a variety of additional resources including trainings that County Staff can access. These materials will help self-assist the users with CalSAWS-related inquiries and informational needs. These materials contain links to the respective documents.

Key resources are available on the project Web Portal or Learning Management System (LMS). If you have not already, you may want to add to your favorites on your web browser:

[Web Portal](#) (**Note:** Not all users have access to the Web Portal)

[Learning Management System](#)

**\*Counties may have County specific sites to host select resources. Please reach out to your County IPOC, POC or trainers for access to County repositories or in case any resource listed in this document is not accessible.**

### 2.2.1 GENERAL USER

This section provides information and links to commonly used resources you may find useful as you begin using CalSAWS consisting of categories like Training, Infographics, Questions and Answers, BenefitsCal, Imaging etc. These sections are relevant to all users of CalSAWS.

#### 2.2.1.1 TRAINING

The following table provides you a list of topics and links, as well as a description of these resources, from the training materials given to your County prior to Go-Live.

Topics/Links	Description
<b>CalSAWS Web Based Training (WBT)</b> <b><u><a href="#">The Learning Management System (LMS)</a></u></b> <b>Key Topics:</b>	The Learning Management System provides a catalog of trainings, reference materials, and Job Aids. The categories range from CalFresh, Medi-Cal, and CalWORKs Eligibility processing to Fiscal, Imaging, and Administration Functions.

Topics/Links	Description
<ul style="list-style-type: none"> <li>• Orientation</li> <li>• Eligibility General</li> <li>• Foster Care</li> <li>• Eligibility Supervisor</li> <li>• Clerical Support/Supervisor</li> <li>• Eligibility CalFresh, CalWORKs, Medi-Cal</li> <li>• Eligibility General Relief</li> <li>• WTW (Employment Services)</li> <li>• Eligibility Cal-Learn</li> <li>• Eligibility RCA</li> <li>• CAPI</li> <li>• Child Care</li> <li>• Hearings</li> <li>• Fiscal/Supervisor</li> <li>• QAQC</li> <li>• Resource Databank</li> <li>• Security/Administrative Support</li> <li>• Simulation</li> <li>• Special Investigations/Supervisor (Fraud)</li> <li>• Child Care APP</li> <li>• Eligibility Foster Care</li> <li>• Eligibility KinGAP</li> <li>• DCFS – Fiscal (for Foster Care)</li> <li>• Analytics</li> <li>• Admin Functions</li> <li>• Child Welfare</li> <li>• Imaging</li> <li>• Supervisor Authorization</li> </ul>	<p>Please see Appendix F (Master Training Plan). The attachment provides descriptions of each WBT course within LMS.</p> <p>The LMS includes 98 CalSAWS Quick Guides that cover a range of topics from Application Registration to BenefitsCal Administrator activities.</p> <p>LMS contains a linkable FAQ section on the LMS Homepage which has instructions regarding the use, functions, and navigation of LMS.</p> <p><b><u>FAQs include:</u></b></p> <ul style="list-style-type: none"> <li>• How do I view a list of completed trainings?</li> <li>• How do I start a training session?</li> <li>• How do I identify my required training assignments?</li> <li>• How do I reset my password?</li> <li>• What should I do prior to starting a training session?</li> </ul> <p>You have access to your WBTs, which are the interactive courses you took that challenged you and provided you simulated tasks (kinesthetic learning) to prepare you for classroom training and reinforce your learning. You completed these WBTs in the weeks leading up to your classroom Instructor-Led Training (ILT) course(s).</p>

Topics/Links	Description
<b><u>Webinars</u></b> <b>Key Topics:</b> <ul style="list-style-type: none"> <li>• Orientation</li> <li>• General Eligibility</li> <li>• Clerical</li> <li>• Eligibility Supervisor</li> <li>• Clerical Supervisor</li> <li>• County Medical Services (CMSP)</li> <li>• Long Term Care (LTC)</li> <li>• Overpayments/Over Issuance</li> <li>• IEVS Abstracts</li> <li>• Administrative Functions</li> </ul>	

### 2.2.1.2 TARGETED TOPICS

Topics	Description
<b>Key Topics:</b> <ul style="list-style-type: none"> <li>• Child Care</li> <li>• E2Lite</li> <li>• Tax Intercept</li> <li>• BenefitsCal</li> </ul> <b>SharePoint Path:</b> <a href="#">Web Portal &gt; Resources &gt; CalSAWS Migration &gt; CalWIN Implementation Support Services &gt; OCM Track &gt; Targeted Topic Sessions &gt; 2022 TT sessions</a>	<p>Targeted Topic Sessions were intended to provide Counties a demonstration of current CalSAWS functionality within a specific area of the application. These allowed the Counties to better understand system processes and functionality of the planned CalSAWS solution providing a visualization of the various pages and functionality within CalSAWS. In the linked location you can find Calrecordings of the sessions and supporting documents relevant to topics.</p> <p><b><u>Child Care Overview</u></b></p> <ul style="list-style-type: none"> <li>• Add Child Care Program</li> <li>• Approve Child Care Need</li> <li>• Approve Child Care</li> <li>• Create the Certificate</li> <li>• Generate Child Care Certificate (CSF 137) and Child Care Reimbursement Request (CSF 141)</li> <li>• Process the Child Care Payment</li> </ul>

Topics	Description
	<ul style="list-style-type: none"> <li>Update Funding Source (Stage 2 &amp; Stage 3)</li> </ul> <p><b><u>E2Lite Overview</u></b></p> <ul style="list-style-type: none"> <li><b>WPR Sample Search</b> page</li> <li><b>WPR Sample Summary</b> page</li> <li><b>WPR Sample Detail</b> page</li> <li>E2Lite Interface File Process</li> <li>E2Lite Interface File Process</li> </ul> <p><b><u>Tax Intercept Overview</u></b></p> <ul style="list-style-type: none"> <li>CalSAWS/WIS Interface Schedule</li> <li>What records are sent to WIS from CalSAWS (timeline)</li> <li>What records are returned from WIS to CalSAWS (timeline)</li> <li>Annual Balancer</li> </ul> <p><b><u>Review Tax Intercept Report Samples</u></b></p> <ul style="list-style-type: none"> <li>FTB Intercept Error Report</li> <li>FTB Intercept Report</li> <li>FTB_TOP Weekly Cleared Edit Report</li> <li>FTB_TOP Weekly Edit Error Report</li> <li>TOP Weekly Intercept Amount Error Report</li> <li>TOP Weekly Intercept Report</li> <li>TOP Weekly Intercept Transaction Report_Posted</li> <li>TOP Weekly Intercept Transaction Report_Unposted</li> <li>TOP Weekly Reversal Report</li> </ul> <p><b><u>BenefitsCal</u></b></p> <ul style="list-style-type: none"> <li>A system demonstration was provided</li> </ul>

#### 2.2.1.3 QUESTIONS AND ANSWERS SECTION

Topics	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• Eligibility Overview</li> <li>• Employment Services Overview</li> <li>• FC, AAP, Kin-GAP</li> </ul> <p><b>SharePoint Path:</b>  <a href="#">CalWIN Implementation Support Services &gt; OCM Track &gt; Q&amp;A Sessions</a></p>	<p>The Q&amp;A Sessions were designed to provide CalWIN Counties a high-level overview of CalSAWS functionality and provide an opportunity to answer questions from County Staff. In the link you can find recordings of the sessions and supporting documents for key topics mentioned.</p>

#### 2.2.1.4 INFOGRAPHICS AND NEWSLETTERS

Topics/Links	Description
<p><b>Key Topics Newsletters:</b></p> <ul style="list-style-type: none"> <li>• County-Wide vs Office-Level Queues</li> <li>• Capture Methods</li> <li>• Training</li> <li>• Additional Resources</li> <li>• Imaging Go-Live Delay</li> <li>• Document Routing Rules and Tasks</li> <li>• CalSAWS Change Reason</li> </ul> <p><b>SharePoint path:</b>  <a href="#">CRFs &amp; CITs &gt; CalSAWS Information Transmittals (CIT) &gt; 2022</a></p>	<p><b><u>Newsletters:</u></b></p> <p>Distributed by Wave to build staff awareness and understanding of the CalSAWS system and project. Newsletters provide pertinent information and integrate ongoing County feedback collected through Change Readiness Surveys, Change Network Champions, County leadership, CalSAWS Regional Managers, and additional project channels.</p> <p><b><u>Infographics:</u></b></p> <p>The infographics contain project/system details that integrate ongoing County feedback collected through Change Readiness Surveys, Change Network Champions, County leadership, CalSAWS Regional Managers, and additional project channels. They include information about the CalSAWS system, functional changes from CalWIN to CalSAWS, and project-related activities (e.g., implementation, organizational change management (OCM), training) These were distributed via CIT and located in the Web Portal.</p> <p><b><u>Topics:</u></b></p> <p>CIT 0103-22</p> <ul style="list-style-type: none"> <li>• Application Registration Summary</li> <li>• EDBC in CalSAWS</li> </ul>

Topics/Links	Description
	<p>CIT 0135-22</p> <ul style="list-style-type: none"> <li>• eICTs (Electronic Inter-County Transfers)</li> <li>• Reception Log and Message Center</li> </ul> <p>CIT 0162-22</p> <ul style="list-style-type: none"> <li>• CalSAWS Imaging Solutions</li> <li>• CalSAWS e-Applications</li> </ul> <p>CIT 0193-22</p> <ul style="list-style-type: none"> <li>• Resource Databank</li> <li>• Supervisor Authorizations</li> </ul> <p>CIT 0232-22</p> <ul style="list-style-type: none"> <li>• CalSAWS Imaging Solutions</li> <li>• Money Management</li> </ul>

#### 2.2.1.5 FACT SHEETS

Topic/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• Running EDBC for Pre and Post Conversion</li> <li>• Imaging CalWIN Legacy Scanning Process</li> <li>• Entering Income in CalSAWS</li> </ul> <p><b>SharePoint Path:</b></p> <p><a href="#">Web Portal&gt;Resources&gt;CalSAWS Migration&gt;CalWIN Implementation Support Services&gt;CalSAWS Go-Live Fact Sheets</a></p>	<p>A <b>Fact Sheet</b> is a document that can describe various functions of CalSAWS as well as provide instructions for performing tasks.</p>

### 2.2.1.6 MIGRATION FAQ

Topic/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• BenefitsCal</li> <li>• CalSAWS Functionality</li> <li>• Change Management</li> <li>• Conversion Support</li> <li>• County Prep Phase</li> <li>• Imaging</li> <li>• Implementation Support Roles</li> <li>• Readiness</li> <li>• Support</li> <li>• Task Management</li> <li>• Technical Readiness</li> <li>• Training</li> </ul> <p><b>SharePoint Path:</b></p> <p><a href="#">Web Portal &gt; Migration FAQ &gt; Migration FAQ.xlsx</a></p>	<p>The <b>Migration FAQ</b> document captures questions or clarifications regarding CalWIN to CalSAWS migration across multiple topics as asked by various stakeholders.</p>

### 2.2.1.7 BENEFITSCAL

Topic/Links	Description
<p><a href="#">BenefitsCal Help Center</a></p> <p><a href="#">BenefitsCal Video</a></p> <p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• BenefitsCal User Guides</li> </ul> <p><b>SharePoint Path:</b></p> <p><a href="#">Web Portal &gt; Training &gt; BenefitsCal &gt; Fact Sheets*</a></p> <p><b>*Fact Sheets are only accessible to users with Web Portal access.</b></p>	<p><b>BenefitsCal</b> is a portal that allows customers to apply, review, and manage their benefits online. Please see the associated links for Fact Sheets and Online Help.</p> <p>Additional information and trainings for BenefitsCal can be found in LMS Catalog #036.</p>



### 2.2.1.8 IMAGING

Topic/Links	Description
<b>Key Topics:</b> <ul style="list-style-type: none"> <li>Imaging Guides from WBTS</li> <li>Resources by Functional Area</li> <li>CalSAWS Imaging</li> <li>Session Materials</li> </ul>	<p>This imaging section provides information on CalSAWS Imaging functionality via a set of Guides, and Fact Sheets. See the below links to access the corresponding sections.</p> <p><b><u>All guides/Job Aids/Other materials:</u></b></p> <p>Web Portal &gt; Resources &gt; Resources by Functional Area &gt; Imaging &gt; 58 County Imaging Solution &gt; <a href="#">Functional Resources</a>.</p> <p><b><u>The fact sheets made for immediately after Go-Live:</u></b></p> <p>Web Portal &gt; Resources &gt; CalSAWS Migration &gt; Implementation &gt; Post-Deployment Support &gt; Post-Deployment Fact Sheets &gt; <a href="#">CalSAWS Imaging</a>.</p> <p><b><u>Training materials (excluding WBTS) created and shared with the Counties:</u></b></p> <p>Web Portal &gt; Training &gt; Imaging Train-the-SME for C-IV &gt; <a href="#">Session Materials</a>.</p>

### 2.2.2 SPECIAL USER

This section includes references which may commonly be used by specific roles such as supervisors, County PPOC, County CalSAWS, Fiscal and Management staff etc.

#### 2.2.2.1 CHANGE DISCUSSION GUIDES

Topics	Description
<p><b><u>Change Discussion Guides</u></b></p> <p><b>SharePoint Path:</b></p> <p><a href="#">CalWIN OCM &gt; OCM &gt; County Change Discussion Guides</a></p>	<p>The <b>Change Discussion Guide</b> (CDGs) describe the process changes that affect the way you will perform your job once the County has transitioned to CalSAWS. CDGs are a compilation of change impacts identified through the Business Process Reengineering (BPR) sessions and Organizational Change Management (OCM) Team's analysis.</p> <p><b><u>Changes to process:</u></b></p> <p>These are changes resulting from a change to a County's current process because of the CalSAWS implementation. These include additional steps, changes in staff handoffs, and changes in the order in which staff perform steps.</p>

Topics	Description
	<p><b><u>New functionality:</u></b></p> <p>These are changes resulting from new functionality or automation.</p> <p><b><u>Change of functionality:</u></b></p> <p>These are changes resulting from different system functions and include areas where County functions might change because it does not exist in CalSAWS.</p> <p><b><u>Changes in terminology:</u></b></p> <p>These are changes resulting from new terminology and include terms used in CalWIN that differ from the term for the functionality in CalSAWS.</p> <p><b><u>New process:</u></b></p> <p>These are changes that have resulted in a new process being required for the County.</p> <p>In addition to this section <b>2.3 Key Process Changes</b> contains information on key process changes common across counties.</p>

#### 2.2.2.2 CALSAWS INFORMATION TRANSMITTAL (CIT) TRACKER

Topic/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>CalSAWS Information Transmittals (CITs)</li> </ul> <p><b>SharePoint Path:</b></p> <p><a href="#">Web Portal &gt; CRFIs &amp; CITs &gt; CalSAWS Information Transmittals (CIT)</a></p>	<p><b><u>CalSAWS Information Transmittals (CITs) Tracker:</u></b></p> <p>Throughout the project information was shared by the project to counties via CITs. This can be accessed if users want to revisit any previously distributed information to the County.</p>

#### 2.2.2.3 CALSAWS CONFIGURATION ITEMS

Topics/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>Access</li> </ul>	<p><b>CalSAWS Configuration items</b> documented as part of the County Prep Packet are intended for key administrative staff providing guidance on County-specific configurations.</p>

Topics/Link	Description
<ul style="list-style-type: none"> <li>• Appointment Management</li> <li>• Automated Actions</li> <li>• Readiness for BenefitsCal</li> <li>• System Configuration</li> <li>• Configure Positions</li> <li>• Configure Sections</li> <li>• Configure Flags</li> <li>• Set Up Mileage Rates</li> <li>• Validate/Update EBT Printers</li> <li>• Update Public Hours of Operation</li> <li>• Correspondence</li> <li>• Fiscal</li> <li>• GA/GR</li> <li>• IEVS</li> <li>• Lobby Management</li> <li>• Medi-Cal</li> <li>• Task Management</li> <li>• Enter County-Specific Task Types</li> <li>• Configure Position Task Categories</li> <li>• Configure Position Task for Get Next Functionality</li> <li>• Configure Task Banks</li> <li>• Configure Document Routing Rules</li> <li>• Configure Error Prone and High-Risk Page</li> </ul>	<p>These actions are/were taken as part of the County Prep Phase but can be referred to in case future configuration changes are required.</p>

Topics/Link	Description
<b>SharePoint Path:</b> <a href="#">CRFIs &amp; CITs &gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt; CIT 0355-22 Wave 2 CalWIN County Prep Phase Kickoff, Activities, and Materials</a>	

#### 2.2.2.4 REPORTS AND DASHBOARDS

Topics/Link	Description
<b>Key Topics:</b> <ul style="list-style-type: none"> <li>Inventory of Reports and Dashboards</li> <li>Overview of Reports</li> <li>CalWIN to CalSAWS Report Mapping</li> </ul> <p>Refer to CalWIN ISS_GLP_Appendix D_CalSAWS Reports Overview</p> <p>Refer to CalWIN ISS_GLP_Appendix L_CalWIN_To_CalSAWS Reports Mapping</p>	<p>This referenced document contains a list of listings of CalSAWS Reports and Dashboards along with an overview of key reports.</p> <p>Additionally, a mapping of most used CalWIN reports to equivalent CalSAWS is provided.</p> <p>Refer to CalWIN_ISS_Appendix J_Qlik Report Subscription for reporting tool Qlik.</p>

#### 2.2.2.5 BATCHES

Topic/Link	Description
<b>Key Topics:</b> <ul style="list-style-type: none"> <li>Batch Inventory</li> <li>Batch Calendar</li> </ul> <p>Refer to CalWIN ISS_GLP_Appendix B_CalSAWS Batch Inventory</p>	<p>These referenced documents provide CalSAWS batch inventory and calendar for 2023 outlining dates for key batches to be run.</p>

Topic/Link	Description
Refer to CAIWIN_ISS_GLP_Appendix C_CalSAWS Batch Calendar 2023	

### 2.3 KEY PROCESS CHANGES

Topic	Summary of Change	Details	Link to Relevant Materials
<b>Application Registration</b>	<p>In CalSAWS, a case can be established in two (2) different ways:</p> <ul style="list-style-type: none"> <li>• Complete application registration steps on Application Registration page</li> <li>• Proceed directly to the New Application page if there is a signed SAWS1</li> </ul>	<p>In CalSAWS Clerical can establish a case by one of the following,</p> <ul style="list-style-type: none"> <li>• If there is a signed SAWS1, then they will proceed directly to the New Application page where the Clerical Staff will begin the file clearance process.</li> <li>• If there is not a signed SAWS1, then they will complete the application registration steps on the Application Registration page.</li> </ul>	<p><a href="#">CRFs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt; <u>CIT 0103-22 Wave 1 and 2 CalSAWS Infographics #1</u></a></p>

Topic	Summary of Change	Details	Link to Relevant Materials
<b>Eligibility Determination and Benefits Calculation (EDBC)</b>	Users can select the individual program and months to run, but EDBC can only be run for six months at a time.	In CalSAWS, Users can run EDBC for a single program or multiple programs simultaneously. EDBC can be run for up to six months (to include the Come-Up Month). After the 10-day cutoff, EDBC can include the Come-Up Month and the Future-Future Month (for example, on April 15, a user can run EDBC through May but on April 25, the user can run EDBC through June). CalSAWS requires that EDBC results are accepted for each program individually before all results are saved.	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt; CIT 0103-22 Wave 1 and 2 CalSAWS Infographics #1</a>
<b>Electronic Inter-County Transfers (eICTs)</b>	In CalSAWS, the e-ICT functionality allows for an intra-Consortium e-ICT process for all 58 Counties.	<p>The eICT process in CalSAWS provides a seamless transfer of participant data and documents from one California County to another without a break in benefits to the recipient.</p> <p>An eICT sent in response to a request from another County is referred to as a Requested eICT. An eICT sent without a request is referred to as a non-Requested eICT.</p> <p>The following programs transfer via the eICT functionality:</p> <ul style="list-style-type: none"> <li>• CalWORKs (CW)</li> <li>• Refugee Cash Assistance (RCA)</li> <li>• CalFresh (CF)</li> <li>• Medi-Cal (MC)</li> </ul>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0135-22 Wave 1 and 2 CalSAWS Infographics #2</a>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
		<p>Confidential Cases can be sent via eICT if there is not a case flag set for Domestic Violence.</p> <p>The eICT functionality is used when all active persons/programs are to be closed in the sending County and transferred to the receiving County.</p>	
<b>Reception Log and Message Center</b>	<p>CalSAWS has Message Center and Reception Log functionality. The Reception Log is like the Traffic Log in CalWIN. The Message Center is new functionality and there is no equivalent in CalWIN.</p>	<p>The Reception Log is used to track Customer visits to County offices. When users access the Reception Log List page, the default display is the current date and all visits that correspond to the status of Waiting to be Seen. The Reception Log can be used to send E-mail notifications to a User or send electronic messages to the Message Center.</p> <p>The Message Center displays electronic messages sent from the Reception Log or the lobby device to a specified User. From the Message Center users can:</p> <ul style="list-style-type: none"> <li>• View their messages</li> <li>• Update the Reception Log visit status to User Acknowledged, Meeting Started, or Complete</li> </ul>	<p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0135-22 Wave 1 and 2 CalSAWS Infographics #2</a></p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>CalSAWS Imaging Solution</b>	The CalSAWS Imaging Solution is the part of CalSAWS that handles documents. It allows staff to upload, view, and store documents.	<p>The CalSAWS Imaging Solution is the part of CalSAWS that handles documents. It allows staff to upload, view, and store documents. The CalSAWS Imaging Solution has All-in-One access. Logging into CalSAWS automatically logs staff into imaging.</p> <p>The CalSAWS Imaging system has several scan modes, including:</p> <ul style="list-style-type: none"> <li>• Single case</li> <li>• Multi-case (Users can use separator sheets when scanning multiple documents/multiple cases)</li> <li>• Return Mail</li> <li>• Other County Department documents</li> <li>• Virtual print</li> </ul> <p>When the Imaging system reads a barcode on the document or finds a form number or key words using Optical Character Recognition (OCR), a Document Routing Rule can trigger the task specified in the rule.</p>	<p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0162-22 Wave 1 and 2 CalSAWS Infographics #3</a></p> <p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0232-22 Wave 1 and 2 CalSAWS Infographics #5</a></p>



## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>e-Application</b>	CalSAWS has functionality to pull in application data for Customers who have applied via an online source such as BenefitsCal.	<p>For applications submitted through BenefitsCal, users will need to be familiar with the eTools menu in CalSAWS. The e-Tools menu is accessed from the Case Info under the Global navigation bar. Within eTools, users will access the e-Application Search page located under the eTools menu. From this page, the user can search for e-Applications received using the mandatory fields of:</p> <ul style="list-style-type: none"> <li>e-Application Status</li> <li>Search by</li> </ul>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0162-22 Wave 1 and 2 CalSAWS Infographics #3</a>
<b>Resource Databank</b>	Resources are shared across Counties and maintained through the Resource Databank (RDB). These providers include employers, schools, money management, and foster care/child welfare programs.	In CalSAWS, resources (providers) are maintained through the Resource Databank (RDB). These providers include employers, schools, money management and foster care/child welfare programs. Providers are referred to as resources in CalSAWS and a resource may be shared across Counties using the RDB.	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0193-22 Wave 1 and 2 CalSAWS Infographics #4</a>
<b>Supervisor Authorization</b>	CalSAWS supervisor authorization functionality has a workflow that generates tasks for Supervisors and Users based on actions taken on the case.	<p>EDBC Supervisor Authorizations and Fiscal Supervisor Authorizations, are configured and set up by the County on the County Authorizations page. The County Authorizations page displays and is divided into four sections,</p> <ul style="list-style-type: none"> <li>EDBC</li> </ul>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0193-22 Wave 1 and 2 CalSAWS Infographics #4</a>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
		<ul style="list-style-type: none"> <li>GA/GR EDBC – Los Angeles County (DO NOT USE)</li> <li>Fiscal</li> <li>Fiscal – Payment/ Valuable Request</li> </ul> <p>The County can set up a First Level authorization, also known as a Supervisor Authorization. If needed, an additional layer of staff approval, or Second Level Authorization, can be configured for system transactions. In addition to configuring the County Authorization page mentioned above, the Position Detail page also must be configured for EDBC authorizations.</p>	
<b>Money Management</b>	CalSAWS can issue County-issued funds from within the system, using the Money Management pages.	<p>Money Management is County-issued disbursements made to resources on behalf of CalWORKs, GA/GR, and Homeless Assistance applicants/participants for housing, utilities, and other money management support.</p> <p>The hierarchy of how vendors should be paid is Housing, Utilities and Vendors of type "Other." The priority determines the order in which vendors of the same type are paid. Vendor payments are not made on supplemental EDBCs.</p>	<a href="#">CRFs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0232-22 Wave 1 and 2 CalSAWS Infographics #5</a>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>Task Management</b>	Task management in CalSAWS is the process for managing tasks through the User Worklist and Worklist PR/RE pages.	<p>In CalSAWS, tasks are managed through the Users Worklist and Worklist PR/RE pages. The Worklist Summary page provides a snapshot of the Task Type, Priority, and date range for when the task type was created.</p> <p>CalSAWS uses the concept of “Office Distribution” to either pool tasks under distinctive positions known as Master Assignment Queues (MAQs) or assign tasks to eligible positions in the office.</p> <p>Certain tasks are orchestrated in nature, having an end-to-end process; in other words, the action of one user kicks off a task to another user.</p>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0206-22 Wave 1 - The CalSAWS Scoop Newsletter #3</a>
<b>Caseloads</b>	There are no closed caseloads in CalSAWS	<p>There are no closed caseloads in CalSAWS. Instead, CalSAWS discontinues programs rather than cases. When a program is discontinued, the Worker assignment is ended for that program, and the Worker ID is removed. The timeframe of this removal may be County and program specific. Tasks associated to the program do not drop off (unless automatically expiring) and must be completed.</p> <p>Cases can be assigned automatically or manually. Users can view their caseload on the applicable Workload Inventory page.</p>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0269-22 Wave 1 and 2 CalSAWS Infographics #6</a>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>Notices of Action (NOAs)</b>	NOAs no longer have manual variables for any eligibility program except for General Assistance/General Relief. NOAs are primarily pre-populated and cannot be altered once generated by the system.	<p>A NOA is a written notice given or mailed to an applicant, participant, or caregiver that provides notification of eligibility, ineligibility, or changes in public assistance benefits.</p> <p>After running EDBC CalSAWS automatically generates the appropriate NOA. The user can preview NOAs prior to completing the steps to authorize EDBC to confirm that the NOAs are accurate. NOAs no longer have manual variables (except for General Assistance/General Relief).</p>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0269-22 Wave 1 and 2 CalSAWS Infographics #6</a>
<b>BenefitsCal</b>	Customers will start using BenefitsCal at the transition to CalSAWS.	BenefitsCal is a new, self-service website for all Californians – regardless of where they live – to apply for and manage benefits like CalFresh, Disaster CalFresh (food assistance), CalWORKs, Cash Assistance Program for Immigrants (cash aid), Medi-Cal and County Medical Services Program (health care). CMSP is currently available in 35 of the 58 California Counties.	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0206-22 Wave 1 - The CalSAWS Scoop Newsletter #3</a>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
		<p>BenefitsCal will support 19 languages: Arabic, Armenian, Chinese, English, Farsi, Hmong, Japanese, Khmer, Korean, Lao, Mien, Portuguese, Punjabi, Russian, Spanish, Tagalog, Thai, Ukrainian and Vietnamese. Arabic, Farsi, Japanese, Mien, Punjabi, Thai, and Ukrainian are expected to be available in the future. This access may reduce the Customers use of translation services (e.g., language line).</p> <p>With BenefitsCal, Customers can apply for General Assistance (GA) which is not an option with My Benefits CalWIN (MyBCW). This is a benefit because the County can identify CalWORKs and GA applications. Customers may apply for GA within BenefitsCal by selecting this option.</p>	
<b>Change Reason</b>	CalSAWS does not have the concept of Use Effective Month (UEM) windows to calculate when to apply a change to a case. CalSAWS will automatically act on the case based on the information provided.	When adding new or updating existing case data, CalSAWS requires a Change Reason and Reported Date. The Change Reason indicates how the County received the information. The Reported Date tells CalSAWS when this information was received. When processing EDBC, CalSAWS uses the Change Reason and Reported Date to apply the data changes to the benefit determination.	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0122-22 Wave 1 - The CalSAWS Scoop Newsletter #2</a>

## 2.4 USER AWARENESS ITEMS

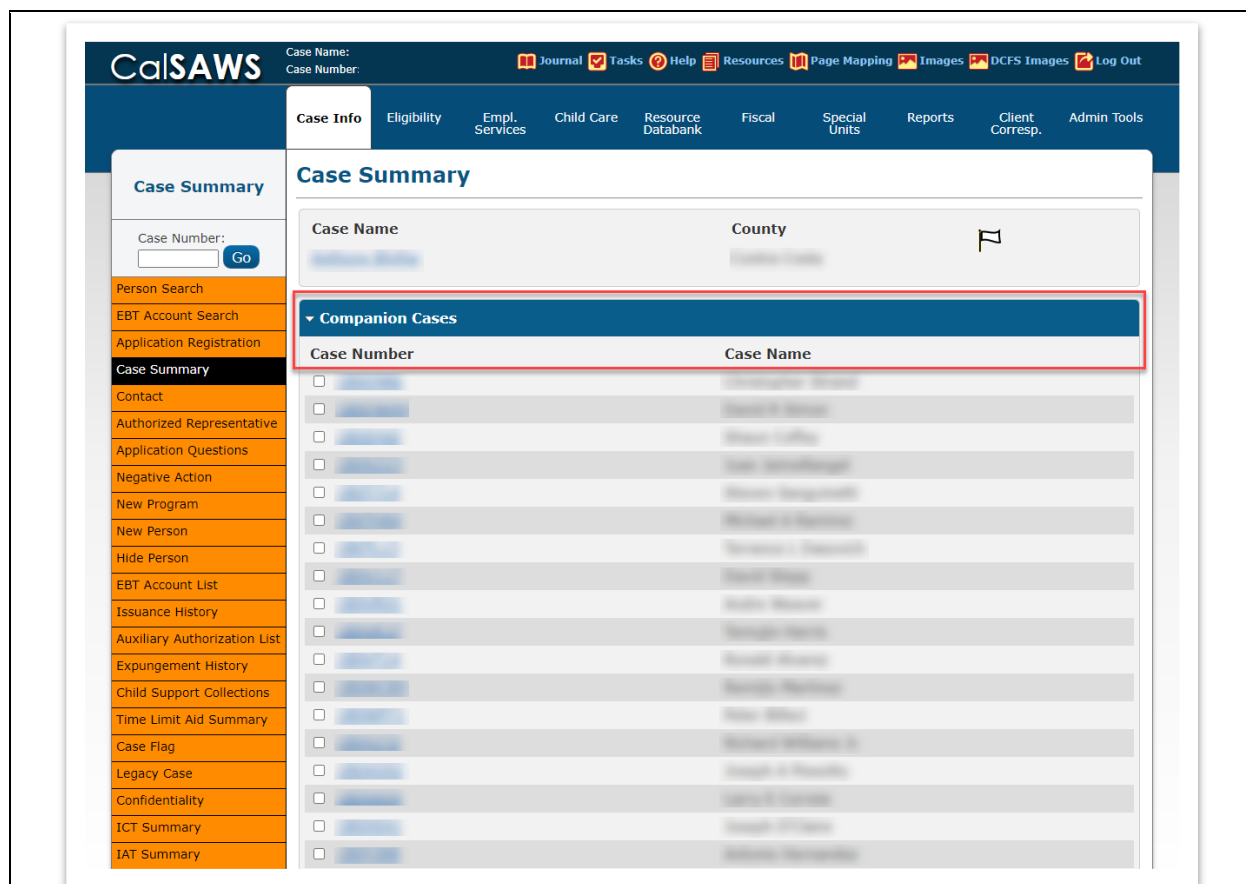
Within this section, are descriptions of behaviors and other items identified in CalSAWS that you may encounter as you begin using CalSAWS. The items listed here are not actionable and are for your awareness only. Each of these items will provide the following:

- What you may experience
- How this will affect the case
- What you need to know

### 2.4.1 CASE MAINTENANCE

#### 2.4.1.1 MULTIPLE COMPANION CASES

Page Name	Case Summary	CalSAWS Field Name(s)	N/A
<b>What Will You Experience?</b>			
Some converted cases may display multiple companion cases on the <b>Case Summary</b> page. The number of cases depends on the case and why this would happen depends on the type of relationships Household members had with one another prior to applying for aid on a separate case.			



**Figure 2.4.1– Case Summary Page Displaying Multiple Companion Cases**

### How Will This Affect the Case?

A decision will need to be made whether to keep or remove the companion cases per County's policy.

### What Should You Know?

For information for adding and removing companion cases, please refer to the CalSAWS Job Aid: Companion Cases – Add and Remove.

### CalSAWS Source/Reference

CA-237084

## 2.4.1.2 NO MAGI REFERRALS

<b>Page Name</b>	MAGI Referral Search	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
The MAGI Referral Detail Information page will not be available.			

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

**MAGI Referral Search**

**Search**

MAGI Case Number:  Case Number:  **Select** Status:

Initiated Date From:  To:  Type:

ZIP:  Office:  Open Medi-Cal:

Results per Page:  **Search**

**Search Results Summary** Results 1 - 100 of 1000

Initiated Date	CFS	MAGI Case Number	MAGI Case Name	Case Number	Type	Status	Non-MAGI	ZIP	Open Medi-Cal
05/20/2022 9:48 PM	No				Determination Response	Complete	No	Yes	
05/20/2022 9:47 PM	No				Determination Response	Complete	No	Yes	
05/20/2022 9:47 PM	No				Determination Response	Complete	No	Yes	
05/20/2022 9:46 PM	No				Determination Response	Complete	No	Yes	
05/20/2022 9:45 PM	No				Determination Response	Complete	No	Yes	
05/20/2022 9:44 PM	No				Determination Response	Complete	No	Yes	

Figure 2.4.2 – MAGI Referral Search Page

**How Will This Affect the Case?**

No Impact to case.



### What Should You Know?

In CalSAWS, only the most recent CalHEERS Determination Eligibility Response (DER) is moved from CalWIN. Additionally, the MAGI Referral Detail Information page will not be available.

#### CalSAWS Source/Reference

CA-237248

### 2.4.1.3 SOLICITATION LETTER

#### Page Name

N/A

#### CalSAWS Field Name(s)

N/A

### What Will You Experience?

In CalSAWS, the CalFresh Solicitation letter will not be sent via batch until an authorized user runs EDBC.

### How Will This Affect the Case?

CalFresh Solicitation letter is not sent automatically and requires manual processing. No other Impact to case.

### What Should You Know?

To generate a CalFresh Solicitation letter on a pending CalWIN Medi-Cal application, you will need to first run EDBC in CalSAWS.

#### CalSAWS Source/Reference

CA-237240

### 2.4.1.4 ROLE AND STATUS REASON

#### Page Name

Medi-Cal Program Block

#### CalSAWS Field Name(s)

Role Reason

### What Will You Experience?

Role Reason is populated for MEM role members.

Status Reason is populated for members with Active program status.

Status Reason is not populated for with Denied program status.

The screenshot shows the 'Case Info' tab in the CalSAWS system. At the top, there are navigation tabs: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. Below these, there are status indicators: MEM, Declined Elig, Denied, and Declined Elig, with a 'View Details' button. The main section is titled 'Medi-Cal' and contains fields for Worker, Worker ID, Program Status, RE Due Month, Primary Applicant/Recipient, Language, Phone Number, Email, Payee, and Application Date. Below these fields is a table with columns: Name, Requested Medi-Cal Type, Role, Role Reason, Status, and Status Reason. The table lists several entries, with the first one highlighted. A red box highlights the 'Role Reason' and 'Status Reason' columns for the first entry.

Name	Requested Medi-Cal Type	Role	Role Reason	Status	Status Reason
[Redacted]	MEM	MEM	Inelig for FPL Pgm	Active	Inelig for FPL Pgm
[Redacted]	MEM	MEM	Out of the Home	Denied	Out of the Home
[Redacted]	MEM	MEM	Out of the Home	Denied	Out of the Home
[Redacted]	MEM	MEM	Out of the Home	Denied	Out of the Home
[Redacted]	MEM	MEM	Out of the Home	Denied	Out of the Home

Figure 2.4.3 – Case Info

### How Will This Affect the Case?

There is no impact to ongoing eligibility. This may impact reports showing denied/discontinued persons with incorrect status where applicable.

### What Should You Know?

Denied/Discontinued persons may not have an associated Status Reason in the Program Details area of the **Case Summary** Page.

### CalSAWS Source/Reference

CA-257652

## 2.4.1.5 CONVERTED STATE HEARINGS NOT APPEARING IN SEARCH

Page Name	Hearing Search	CalSAWS Field Name(s)	Multiple search field options
What Will You Experience?			

Hearings do not appear on Hearing Search page results.

**Hearings**

**Hearing Search**

▶ Refine Your Search

Add Hearing

Hearing ID	Name	Hearing Number	Status	Status Reason	Filing Date 1	Hearing Date	Hearing Time
No Data Found							

Add Hearing

Figure 2.4.4 – Case Info

**Hearing Search**

▼ Refine Your Search

Search

**Hearing ID:**

**Hearing Number:**

**Case Number:**

**Name:**

**SSN:**

**Assigned To:** 90AS00014F

**File Date Range:**

**From:**

**To:**

**Hearing Date:**

**Status:**

**Status Reason:**

**County:**

Results per Page:

Figure 2.4.5 – Case Info

## How Will This Affect the Case?

A worker would not be able to see any scheduled hearings or help the applicant with questions about it.

## What Should You Know?

In the short term, worker will need to refer to the legacy system (CalWIN).

This will be fixed by a backend data change. The worker does not need to do anything.

CalSAWS Source/Reference	CA-264811
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#### 2.4.1.6 MC RE PACKETS NOT SENT TO AUTHORIZED REPRESENTATIVES

Page Name	Authorized Representative Program Detail	CalSAWS Field Name(s)	MC RE Packet Recipient
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##### What Will You Experience?

Authorized Representatives did not receive the MC RE packet because in the Authorized Representative Program Detail page, the MC RE Packet field states NO.

The screenshot shows the 'Authorized Representative Program Detail' page. At the top, there's a navigation bar with tabs: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, and Reports. Below the tabs, the title 'Authorized Representative Program Detail' is displayed. A legend indicates that an asterisk (\*) denotes required fields. The form contains the following fields:

- Name:** Health Care for All- Maria Lara
- Program:** Medi-Cal
- Additional Correspondence Recipient:** Yes (marked with a red asterisk)
- MC RE Packet Recipient:** No (highlighted with a red box and marked with a red asterisk)
- Authority:** Full (marked with a red asterisk)

Figure 2.4.6 – Authorized Representative Program Detail Page

##### How Will This Affect the Case?

The letter should have been sent to beneficiary and authorized representative but has no change.

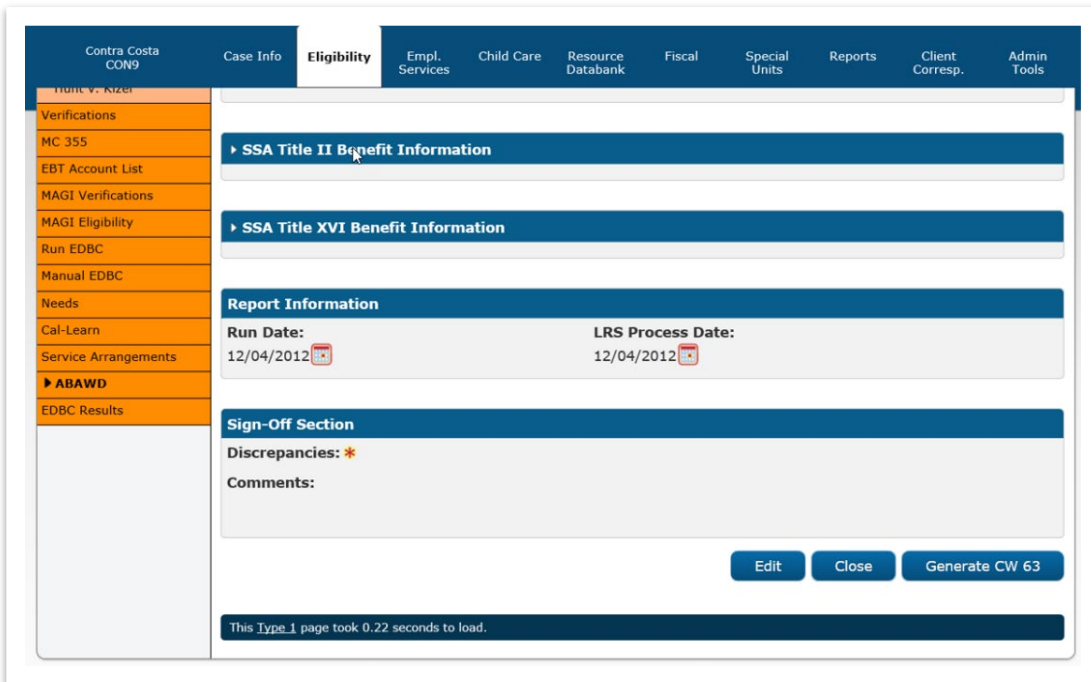
### What Should You Know?

The packets will have already been sent out for the current renewal period and for the future renewal period, the counties will have to manually send out the packets to the ARs (if not already corrected by then).

### CalSAWS Source/Reference

CA-264449

### 2.4.1.7 IEVS APPLICANT MISSING DATA

Page Name	IEVS Applicant Detail	CalSAWS Field Name(s)	Discrepancies
What Will You Experience?			
On the <b>IEVS Applicant Detail</b> page, mandatory values are missing in the <i>Sign-Off</i> section for “Discrepancies.”			
			
Figure 2.4.7 – IEVS Applicant Detail Page, Sign-Off Section			
How Will This Affect the Case?			

No impact to eligibility or reports.	
<b>What Should You Know?</b>	
User can update this information manually by selecting the <b>IEVS Applicant Detail</b> page and updating the <i>Sign Off</i> section.	
<b>CalSAWS Source/Reference</b>	CA-237082

## 2.4.2 DATA COLLECTION

### 2.4.2.1 CALHEERS VERIFICATION

<b>Page Name</b>	N/A	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
<p>In CalSAWS, there will be no historical data in the <i>CalHEERS Verifications</i> section on the following pages for converted cases:</p> <ul style="list-style-type: none"> <li>• Individual Demographics</li> <li>• Residency</li> <li>• Citizenship</li> <li>• Living Arrangement</li> <li>• Income</li> <li>• Tax Household, and Other Health Care</li> </ul>			

The screenshot displays the CalSAWS web application interface. At the top, there's a header with the CalSAWS logo and navigation links like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a sub-header with tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Individual Demographics List'. On the left, there's a sidebar with a 'Customer Information' section containing a 'Case Number' field and a 'Go' button. Below this is a 'Person Search' section and a 'Non Financial' section with a list of links: Contact, Root Questions, Individual Demographics (highlighted), Vital Statistics, Household Status, Relationship, Citizenship, Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., and Non-Compliance. The main content area has a 'Continue' button at the top right. Below it is a 'Root Questions' section. The 'CalHEERS Verifications' section is highlighted with a red box and contains a table with columns: Name, SSN, US Citizenship, and Deceased. Below this is another table with columns: Name, SSN, and DOB. This table has two rows of data, each with 'Edit' and 'View History' buttons. At the bottom right, there's a 'Complete' checkbox and a 'Continue' button.

**Figure 2.4.8 – Individual Demographics List Page**

### How Will This Affect the Case?

No impacts to case.

### What Should You Know?

These sections will auto populate with data from each new Determination of Eligibility Response (DER) when MAGI is requested after Go-Live.

### CalSAWS Source/Reference

CA-236430

## 2.4.2.2 CUSTOMER ACTIVITIES MISSING

Page Name	Customer Activity List	CalSAWS Field Name(s)	Activity Participation
What Will You Experience?			

After conversion, the *Empl. Services -> Customer Activities List* page in CalSAWS has no activities listed.

Figure 2.4.9 – Individual Demographics List Page

### How Will This Affect the Case?

This does not impact eligibility. However, the worker will not be able to view the related activities, and payments tied to the missing activities may be impacted.

### What Should You Know?

During conversion customer activities for WTW 2 Plans are not migrated if the source data did not include either a session or a link to a provider.

Although a worker can look these activities up in CalWIN and enter them manually, a data fix is expected to address them.

CalSAWS  
Source/Reference

CA-260716



### 2.4.2.3 CUSTOMER ACTIVITIES LIST PAGE MISSING DATA

Page Name	Customer Activity List	CalSAWS Field Name(s)	Activity Participation
<b>What Will You Experience?</b>			
After conversion, Customer Activities List page will lack activities. However, the Activity Agreement detail page may have activities linked to WTW 2.			
<b>How Will This Affect the Case?</b>			
There is no impact on eligibility or benefits. A worker viewing the case will see incorrect activities (belonging to another customer) or missing activities for members on this case.			
<b>What Should You Know?</b>			
During conversion customer activities are getting mapped to the wrong case number. No action is expected. A data fix will address this issue.			
CalSAWS Source/Reference	CA-258646		

### 2.4.2.4 CLIENT'S WRITTEN LANGUAGE INCORRECT

Page Name	Individual Demographics Detail	CalSAWS Field Name(s)	Written Language
<b>What Will You Experience?</b>			

After conversion, some client's Written Language preference may not reflect what was in CalWIN. E.g.: A client whose written language preference may be *Spanish* in CalWIN may show up in CalSAWS with a preference for *English*

#### How Will This Affect the Case?

Forms and NOAs generated for this person may show up in a language that is not their preference.

#### What Should You Know?

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Individual Demographics* link to access the **Individual Demographics List** page.
3. Click the link of the case person's name to access the **Individual Demographics Detail** page.
4. Select the appropriate Written Language from the drop list menu.
5. Click the *Save and Return* button.

#### CalSAWS Source/Reference

CA-256062

#### 2.4.2.5 ALIAS SSN IN CALWIN IS CONVERTED TO SSN IN CALSAWS

Page Name	Individual Demographics Detail	CalSAWS Field Name(s)	SSN
What Will You Experience?			
Alias SSN are converted to the CalSAWS Individual Demographics Detail page with Status of "No SSN" and reason of "I do not qualify for SSN"			

Figure 2.4.10 – Individual Demographics Detail Page

The Alias SSN may also appear on the Previous Social Security Number Section

Figure 2.4.11 – Individual Demographics Detail Page

### How Will This Affect the Case?

No impacts to the case and will not send anything to MEDS.

The person however could come up on SSN search.

### What Should You Know?

Counties can choose to leave or remove the reference and document their action

### CalSAWS Source/Reference

CA-247238

## 2.4.2.6 TELEPHONE UTILITIES

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

In CalSAWS, details on **Expense Detail** page for historical converted utilities expense entries will be blank for converted cases.

Please refer to the Job Aid – Expense Management for more information.

The screenshot displays the CalSAWS web application interface. On the left is a sidebar menu with categories like 'Customer Information', 'Expenses', and 'Verifications'. The 'Expenses' section is expanded, showing various expense types. The main area is the 'Expense Detail' form. It contains several input fields: 'Expense Category' (set to Utilities), 'Expense Type' (set to Telephone), 'Frequency' (set to Monthly), and 'Intent to Reduce Expense Amount'. There are also buttons for 'Edit' and 'Close'. Below these fields is a 'Shared with RDP' section. At the bottom, there are two tables: 'Contributors' and 'Amounts'. The 'Contributors' table has columns for 'Persons', 'Begin Date', and 'End Date', and currently shows 'No Data Found'. The 'Amounts' table has columns for 'Amount', 'Amount Paid by Others', 'Begin Date', and 'End Date', also showing 'No Data Found'. A red rectangular box highlights the 'Contributors' and 'Amounts' tables.

Figure 2.4.12 – Expense Detail Page

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

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

**Customer Information**

Case Number:  Go

Person Search

► Non Financial

▼ Financial

Root Questions

Income

Tax Household

Property

Special Needs

**Expenses**

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Cal-Learn

Service Arrangements

► ABAWD

**Expense Detail**

\*- Indicates required fields

**Expense Category:** \* Utilities

**Expense Type:** \* Telephone

**Frequency:** \* Monthly

**Intent to Reduce Expense Amount:**

**Reduction Due Date:**

**Description:** Phone/Internet/Other Communication-Standard

**Shared with RDP**

Display From: To: **View**

**Contributors**

Persons	Begin Date	End Date
	02/01/2020	02/02/2020

**Amounts**

Amount	Amount Paid by Others	Begin Date	End Date
0.00	0.00	02/01/2020	02/02/2020

Figure 2.4.13 – Expense Detail Page

### How Will This Affect the Case?

No impacts to the case.

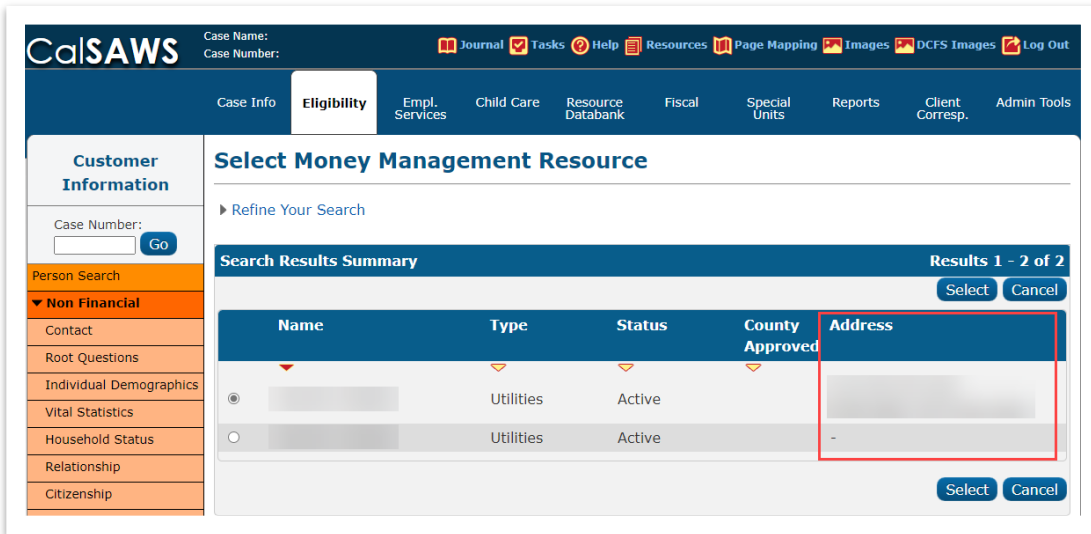
### What Should You Know?

Historical converted utilities expense entries will not be available for converted cases.

### CalSAWS Source/Reference

CA-236687/ CA-256125

## 2.4.2.7 VENDOR INFORMATION

Page Name	Money Management Resource	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>In CalSAWS, only addresses with a type of “Physical” display for vendors on the <b>Money Management Resource</b> page.</p>			
			
Figure 2.4.14 – Money Management Resource Page			
How Will This Affect the Case?			
No Impact to case.			
What Should You Know?			
<p>All CalWIN money management resources with a Type of “Utilities” have had their address type converted to “Mailing Address.” Because of this, when CalSAWS users navigate to the Money Management Detail page and attempt to select one of these resources, physical addresses may not be visible.</p> <p>You can refine your search with known locations to find a given resource, but the impact is purely cosmetic, and the mailing address is viewable after you select the resource.</p>			
CalSAWS Source/Reference	CA-245531		

### 2.4.2.8 SHELL CASES

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

#### What Will You Experience?

If a user come across a shell case, the case will contain no active programs and minimal information.

The screenshot shows the CalSAWS Case Summary page. The sidebar on the left contains navigation links: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Case Summary' and includes a search bar for Case Number. Below the search bar, there is a table with the following data:

Case Name	County
[Redacted]	[Redacted]

Below the table, there is a section for 'Data Removal Status' with a 'Complete' link. To the right, there are fields for 'Identification Date' (04/08/2022) and 'Completion Date' (04/08/2022). Below this, there is a section for 'Companion Cases' with a table for Case Number and Case Name. At the bottom, there is a section for 'All People Associated with the Case' with a table showing Name, DOB, Age, Gender, SSN, CIN, Person #, and Household Status.

Figure 2.4.15 – Case Summary Page

#### How Will This Affect the Case?

No impact to case.

#### What Should You Know?

The CalSAWS Data Retention Policy (CDRP) pertains to the data related to the Eligibility programs administered by the Counties and stored within the CalSAWS system. The CDRP removes information from cases if it has been six (6) years since denial or discontinuance and no actions have been taken on the case within that timeframe (unless the case meets an exception) unless the County overrides the removal. In addition to case data, this process also removes documents and images.

Once a case has had the data removed, the resulting product is referred to a “shell case.”

Shell cases include the following information:

- The Case Serial Number and Case Name
- Basic information about which people were associated to a case (i.e., the All People Associated to the Case section at the bottom of the Case Summary page)
- Time Limit information, which is retained in the system forever. This will include images associated with the case that have a Time Limit document type.
- Case Confidentiality (if any)
- Companion Case relationships (if any)

Once the Case Data Removal Process is completed, do not take case actions, or attach images or documents to the case. A new case must be created and linked to the shell case as a companion case.

If the case contained Journal Entries or an Issuance history, the information will be available in PDF format via hyperlinks on the **Case Data Removal Detail** page.

- [CalSAWS Job Aid – Data Removal Process](#) (Also available in CalSAWS Online Help)
- [CalSAWS Data Retention Policy](#)

#### 2.4.2.9 SPECIAL NEEDS

Page Name	Recurring Special Needs	CalSAWS Field Name(s)	Need
<b>What Will You Experience?</b>			
<i>Pregnancy Special Needs</i> entries on the <b>Recurring Special Needs List</b> page are missing the mandatory <i>Need</i> field.			



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

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

**Customer Information**

Case Number:  Go

Person Search

► Non Financial

▼ Financial

Root Questions

Income

Tax Household

Property

**Special Needs**

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

### Recurring Special Needs List

Continue

► Root Questions

**Search Results Summary** Results 1 - 1 of 1

Display From:  To:  View Add

Person	Need	Value	Begin Date	End Date
<input type="checkbox"/> [Redacted]	Pregnancy	47.00	09/30/2009	06/30/2010

Remove Add Complete Continue

This Type\_1 page took 0.64 seconds to load.

Figure 2.4.16 – Recurring Special Needs List Page

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

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

**Customer Information**

Case Number:  Go

Person Search

► Non Financial

▼ Financial

Root Questions

Income

Tax Household

Property

**Special Needs**

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

### Recurring Special Needs Detail

Edit Close

\*- Indicates required fields

**Change Reason**

Change Reason: Participant Provided - Verbal Reported Date: 06/30/2010 View

Name: \*

**Need: \***

Description: Pregnancy Special Need

Monthly Amount Type: Actual Monthly Amount: 47.00 Begin Date: \* 09/30/2009 End Date: 06/30/2010

Verified: \* View

Edit Close

Last Updated On 04/09/2022 12:00:00 AM By: 07

This Type\_1 page took 0.44 seconds to load.

Figure 2.4.17 – Recurring Special Needs Detail Page

How Will This Affect the Case?	
No impact to case.	
What Should You Know?	
<p>Historical converted Pregnancy Special Need entries will not contain any information in the <i>Need</i> drop list section of the corresponding Recurring Special Needs Detail page. These entries are for historical reference only.</p> <p>The Pregnancy Special Need is now calculated in EDBC automatically based on information entered in the <b>Pregnancy List</b> page. CalSAWS does not provide users the ability to update this field.</p>	
CalSAWS Source/Reference	CA-237024

#### 2.4.2.10 BUDGET LINK

Page Name	Income and Property	CalSAWS Field Name(s)	Combined Income Deductions
What Will You Experience?			
<p>When clicking on the <i>Pass/Fail</i> budgets to review <i>income/property</i>, the totals for both will display. However, when clicking the <i>hyperlink</i> for these amounts, there will be no detailed information as to what these amounts pertain to for converted cases.</p>			

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

Contra Costa CON9 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
		UP	Out of the Home	Denied	Out of the Home	
		MEM	Eligible to MC	Active	Eligible to MC	

Reporting Configuration

Property Test

Test	Result	Property Limit	Property Total	Person	Individual Amount
MPPP - MC	Pass	\$2,000.00	\$0.00		\$0.00

Medi-Cal Summary

Note: Overridden rows are in bold.

Eligible Budgets for MEDS

Test	Result	SOC	% Oblg	FBU	Aid Code	Members Tested	Role	Role Reason
MPPP - MC	Pass	\$0	0.00	1	80		MEM	Eligible to MC
Aged and Disabled	Pass	\$0	0.00	1	1H		MEM	Eligible to MC
MC Income	Pass	\$0	0.00	1	14		MEM	Eligible to MC

Figure 2.4.18 – Income/Property Pages

Customer Information Case Number: Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Medi-Cal EDBC - MPPP - MC Close

Begin Month	End Month	Run Date	Run Status	Accepted By
04/2021		03/06/2021	Accepted - Saved	Conversion User

Income Determination

Unearned Income	\$	493.00
Unearned Income Deductions	-	20.00
Net Unearned Income	=	473.00
Earned Income	\$	0.00
Earned Income Deductions	-	0.00
Net Earned Income	=	0.00
Total Net Income	\$	473.00
Combined Income Deductions	-	20.00
Income Adjustments	+	0.00
Allocation and Other Deductions	-	0.00
Total Net Nonexempt Income	=	473.00
Unit Size		

Figure 2.4.19 – Income/Property Pages

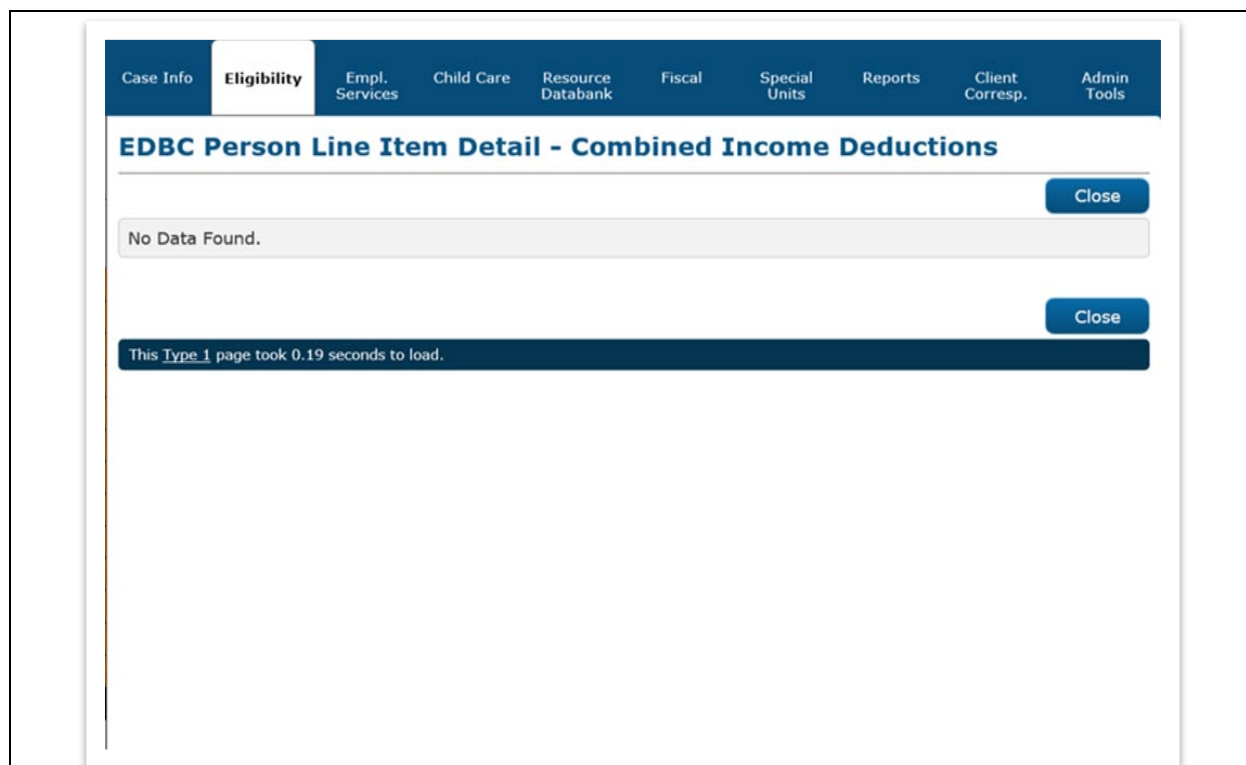


Figure 2.4.20 – Income/Property Pages

#### How Will This Affect the Case?

No impact to case. Users cannot see detailed information which can be alternatively sourced from NOA, or income information on data collection screen.

#### What Should You Know?

Not applicable/for user awareness only.

#### CalSAWS Source/Reference

CA-237211

## 2.4.3 EMPLOYMENT SERVICES

### 2.4.3.1 SERVICE ARRANGEMENTS

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

#### What Will You Experience?

For converted CalWIN cases, there is the possibility that multiple service arrangements may be associated with the same need.

The screenshot shows the CalSAWS 'Needs List' page. On the left is a sidebar with 'Supportive Services' and a list of options: Case Number, Person Search, Service Arrangements, Needs (highlighted), and Referrals. The main area has a 'Needs List' header with search filters: 'Display by Name' (set to All), 'From' (08/01/2021), 'To' (08/31/2021), 'Category', and 'Type'. A 'View' button is next to the Type filter. Below the filters is a 'Search Results Summary' section showing 'Results 1 - 1 of 1'. A table displays the results, with a red box highlighting the first row. The table has columns: Type, Name, Category, Begin Date, End Date, and Status. The highlighted row shows 'Other' as the type, a blurred name, 'Ancillary - Work Related' as the category, '08/10/2021' as the begin date, '08/30/2021' as the end date, and 'Met' as the status. Action buttons 'Edit' and 'View History' are next to the status. At the bottom of the table are 'Remove' and 'Add Need' buttons.

Type	Name	Category	Begin Date	End Date	Status
Other	[Blurred]	Ancillary - Work Related	08/10/2021	08/30/2021	Met

Figure 2.4.21 – Needs List Page

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

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

**Supportive Services**

Case Number:  **Go**

Person Search

**Service Arrangements**

Needs

Referrals

**Service Arrangements List**

Display by Name:  From:  To:

Program:  Category:  Type:  **View**

**Search Results Summary** Results 1 - 3 of 3

Service Arrangement ID	Customer Name	Need Type	Need Category	Status	Status Date	
		Other	Ancillary - Work Related	Approved	08/10/2021	<b>Edit</b>
		Other	Ancillary - Work Related	Approved	08/10/2021	<b>Edit</b>
		Diaper Allowance	Other Supportive Services	Approved	04/01/2021	<b>Edit</b>

**Remove**

Figure 2.4.22 – Service Arrangements List Page

**CalSAWS** Case Name: Kiara Foster Case Number: 1B1LZ16 Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Contra Costa CON9 Case Info Eligibility Empl. Services Child Care Resource Databank **Fiscal** Special Units Reports Client Corresp. Admin Tools

**Payment Requests**

- Payment Request Search
- Certificate Search
- Service Arrangement Search

**Payment Request Search**

\*- Indicates required fields

Refine Your Search

**Search Results Summary** Results 1 - 25 of 55

1 2 3 Next

[View Detailed Results](#)

Payment Request ID	Case Number	Payee Name	Child Name	Service Month	Request Amount
		Public Health		06/2022	\$30.00
		Public Health		05/2022	\$30.00
		Public Health		03/2022	\$30.00
		Public Health		02/2022	\$30.00
		Public Health		01/2022	\$30.00
		Public Health		12/2021	\$30.00
		Public Health		11/2021	\$30.00
		Public Health		10/2021	\$30.00
		Public Health		09/2021	\$30.00
		Public Health		08/2021	\$100.00
		Public Health		08/2021	\$100.00
		Public Health		08/2021	\$30.00
		Public Health		07/2021	\$30.00

**Figure 2.4.23 – Payment Request Search Page**

### How Will This Affect the Case?

No impact to case.

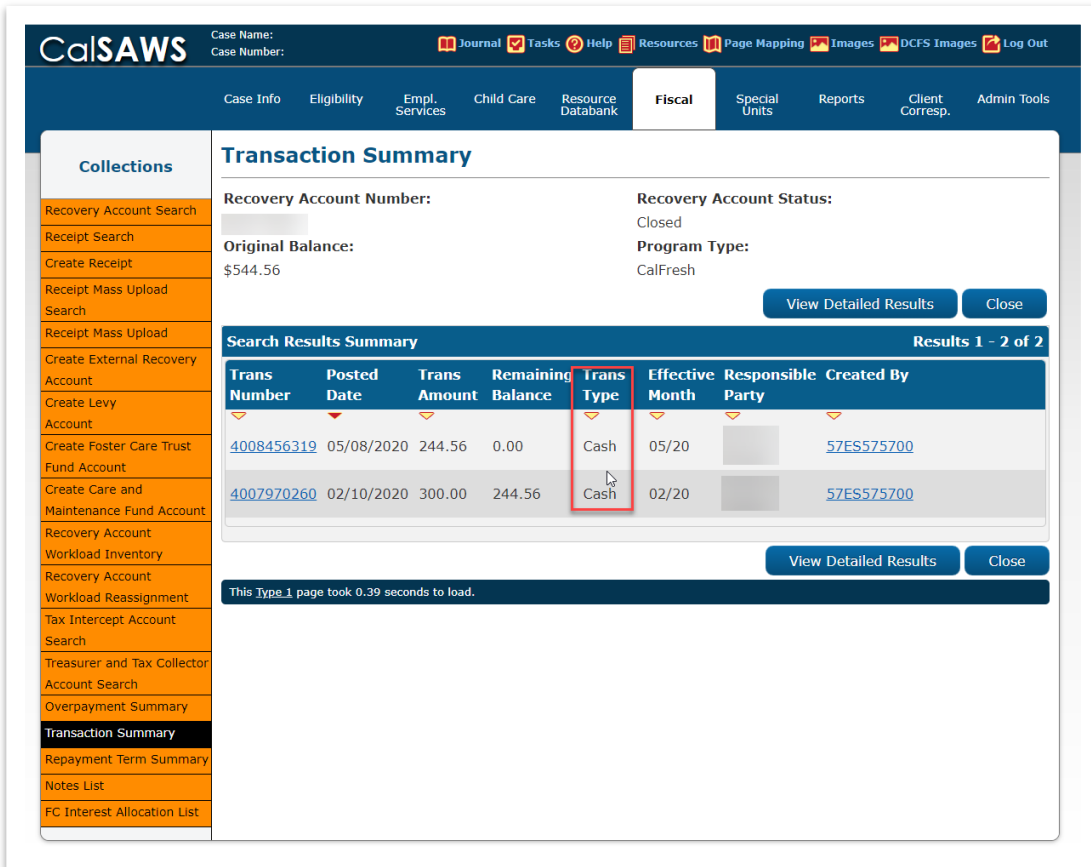
### What Should You Know?

It is possible to have two (2) service arrangements for one (1) need. Best practice would be to create a separate need for each service arrangement, but there is not a functional issue with two service arrangements being associated with the same need.

### CalSAWS Source/Reference

CA-237407

## 2.4.3.2 REPAYMENT METHOD

Page Name	N/A	CalSAWS Field Name(s)	Trans Type
What Will You Experience?			
<p>In CalWIN, claim repayment methods may include “Money Order” as a selection. In CalSAWS, the repayment method is displayed as “Trans Type” and does not include money order as a selection.</p>			
 <p>The screenshot displays the CalSAWS interface. On the left is a sidebar with a 'Collections' menu. The main content area is titled 'Transaction Summary'. It includes fields for 'Recovery Account Number', 'Original Balance' (\$544.56), 'Recovery Account Status' (Closed), and 'Program Type' (CalFresh). Below this is a 'Search Results Summary' table with columns: Trans Number, Posted Date, Trans Amount, Remaining Balance, Trans Type, Effective Month, Responsible Party, and Created By. Two rows of transaction data are shown, both with 'Cash' as the 'Trans Type'. A red box highlights the 'Trans Type' column header and the 'Cash' entries in the first two rows. At the bottom of the table, a message states: 'This Type_1 page took 0.39 seconds to load.'</p>			
Figure 2.4.24 – Transaction Summary Page			
How Will This Affect the Case?			
No impact to case.			



**What Should You Know?**

Claims converted over from CalWIN with a repayment method of “Money Order” will be updated to a trans type of “Cash” in CalSAWS.

**CalSAWS Source/Reference**

CA-247339

**2.4.3.3 EMPLOYMENT SERVICES ACTIVITY TYPES**

**Page Name**

N/A

**CalSAWS Field  
Name(s)**

N/A

**What Will You Experience?**

In CalSAWS, Employment Services will be displayed “Community Services” for the following CalWIN Activity Type: Other, Local, County, State, Fed

**How Will This Affect the Case?**

This does not impact the case.

**What Should You Know?**

In CalSAWS, these Activity Type codes have been converted to “Community Services.”

**CalSAWS Source/Reference**

N/A

## 2.4.4 ELIGIBILITY DETERMINATION AND BENEFIT CALCULATION

### 2.4.4.1 CALWORKS CHANGE NOA

Page Name	Distributed Documents Search	CalSAWS Field Name(s)	N/A
-----------	------------------------------	-----------------------	-----

### What Will You Experience?

In CalSAWS, Notices of Action generate based on several trigger conditions. Multiple NOAs may generate depending on which of these conditions is met, including changes to applicant/recipient program roles.

Cases that convert with active CalWORKs programs may encounter situations where a NOA may generate when EDBC is run that the user did not anticipate due to changes in program roles.

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

### Distributed Documents Search

\*- Indicates required fields

Refine Your Search

Search Results Summary

Results 1 - 2 of 2

	Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
<input type="checkbox"/>	03/14/2022 9:52 AM	<a href="#">NOA - CW - BC - Recoupment Begin</a>		CalWORKs	Accept - Print Centrally	<div>Details</div>
<input type="checkbox"/>	03/14/2022 9:52 AM	<a href="#">NOA - CW - BC - No Good Cause-Non Compliance Plan</a>		CalWORKs	Pending Review	<div>Details</div>

Cancel Print

Images

Figure 2.4.25 – Distributed Documents Search Page

How Will This Affect the Case?
--------------------------------

No Impact to case

Figure 2.4.25 – Distributed Documents Search Page

## What Should You Know?

CalSAWS users must review Notices of Action that the CalSAWS system generates as part of running EDBC for active CalWORKs and reject the NOAs that are not applicable, as the status reason may be different for converted cases.

Failure to review NOAs for accuracy could result in QC errors for incorrect noticing.

### CalSAWS Source/Reference

CA-242460

## 2.4.4.2 CONVERTED BUDGETS

### Page Name

Immediate Need  
EDBC Summary

### CalSAWS Field Name(s)

N/A

## What Will You Experience?

Some budget details may be missing in Converted EDBC records for an Approved or Denied Immediate Need program.

Figure 2.4.26 – Immediate Need EDBC Summary Page

### How Will This Affect the Case?

There is no impact to eligibility.

### What Should You Know?

Awareness Only.

### CalSAWS Source/Reference

CA-237538

## 2.4.4.3 ACTIVITY AGREEMENT LIST ISSUES

### Page Name

Activity  
Agreements List

### CalSAWS Field Name(s)

N/A

### What Will You Experience?

On the **Activity Agreements List** page, the customer activity detail may be missing all the details on the page.

Create Date	Form Type	Name	Sign Date	Activity Type	Activity Status	Start Date	End Date
				Employment	Closed	12/04/2012	
				Employment	Closed	05/12/2013	10/05/2013
				Job Club	Completed	11/11/2013	11/22/2013
				Community Services	Closed	12/04/2012	
				Job Club	Closed	12/04/2012	
				Life Skills	Completed	12/09/2013	01/03/2014
				Voc/Ed Training	Closed	12/04/2012	
				Employment	Completed	01/06/2014	06/30/2014
				Mental Health	Closed	12/04/2012	

Figure 2.4.27 – Activity Agreements List Page

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
10/14/2021	WTW 2	Dean, Melissa 43F	01/03/2014						
						Voc/Ed Training	Closed	12/04/2012	
						Employment	Completed	01/06/2014	06/30/2014
						Mental Health	Closed	12/04/2012	
						WTW			
						Retention Services	Closed	12/04/2012	
						Education & Training	Closed	11/30/2012	02/02/2013
						Life Skills	Closed	12/04/2012	
						Community Services	Closed	01/25/2013	03/03/2013
						Job Search	Closed	12/04/2012	
						Other			
						Welfare-To-Work	Closed	12/04/2012	
						Job Search	Completed	11/25/2013	12/06/2013

Remove

Name:

Images Add Agreement

Figure 2.4.28 – Activity Agreements List Page

### How Will This Affect the Case?

Impact is that user is unable to see the Create Date, Form Type, Name and Sign Date on multiple converted historical Activity Agreement Records, preventing ongoing case work.

### What Should You Know?


You can add a new Activity agreement record.

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar.
2. From the **Local** navigator select *Empl. Services*, then *Activities*, and then *Activity Agreements*.
3. From the *Name* drop list on the **Activity Agreements List** page, select the correct participant.
4. Click the *Create Date Hyperlink* which will navigate to **Activity Agreements Detail Page**.
5. Click the *Activity Type Hyperlink* to **Customer Activity Detail Page**.
6. View the required fields with appropriate data populated.

### CalSAWS Source/Reference

CA-237247

## 2.4.4.4 INCORRECT REPLACEMENT BENEFITS

Page Name	Auxiliary Payments ► Issuance Detail	CalSAWS Field Name(s)	Sub-Category
<b>What Will You Experience?</b>			
<p>After conversion, some Auxiliary Issuances were converted with a Replacement Benefit Sub-Category when the field should be blank.</p> <p>When viewing the Issuance Detail for some Issuances the system will display them as Replacement Benefits, but they have no related issuances.</p>			
 <p>The screenshot shows the 'Issuance Detail' page. At the top, there are buttons for 'Affidavit', 'Print', 'Replace', 'Edit', and 'Close'. Below these, a legend indicates that a red asterisk (*) denotes required fields. The main form contains several fields: 'Control Number' (070013781227), 'Category' (Monthly Benefit), 'Benefit/Service Month' (09/2022), 'Case Number' (redacted), 'Case Name' (redacted), 'Program' (CalWORKs), and 'Sub-Category' (Replacement Benefit). The 'Sub-Category' field is highlighted with a red border, indicating it is a required field.</p>			
<b>Figure 2.4.29– Issuance Detail Page</b>			
<b>How Will This Affect the Case?</b>			
The case will display a Replacement Benefit when there is none.			
<b>What Should You Know?</b>			
The Sub-Category field displayed on the Issuance Detail page for Auxiliary Payments can be ignored			
<b>CalSAWS Source/Reference</b>		CA-255358	

## 2.4.4.5 MISSING RECORD FOR MC DECLINED ELIGIBLE IF NOT REQUESTING MEDI-CAL

Page Name	Customer Options	CalSAWS Field Name(s)	
<b>What Will You Experience?</b>			

After conversion, some records for individuals not requesting Medi-Cal may not be converted.

When viewing the Customer Options page some **MC Declined Eligible** records may be missing for individuals not requesting Medi-Cal.

Name	Type	Begin Date	End Date
40F	Full Medi-Cal Hierarchy	04/11/2020	
40F	Admin Verify MEC - MEDS	04/11/2020	
40F	Maintain Verifications	04/11/2020	
40F	Verification Consent	03/04/2019	
11M	Full Medi-Cal Hierarchy	04/11/2020	
11M	Maintain Verifications	04/11/2020	
11M	Verification Consent	03/04/2019	

**Figure 2.4.30– Customer Options Page**

### How Will This Affect the Case?

The dependent will no longer be considered for determination in the future.

### What Should You Know?

This may impact Medi-Cal/MSP/CMSP cases.

Add Customer Option record for person not requesting MC, if possible.

### CalSAWS Source/Reference

CA-256400

## 2.4.5 FISCAL/RECOVERY ACCOUNTS

### 2.4.5.1 PENDING RECOVERY ACCOUNTS

Page Name	N/A	CalSAWS Field Name(s)	N/A
<b>What Will You Experience?</b>			
Pending recovery accounts in CalWIN are not available in CalSAWS			
<b>How Will This Affect the Case?</b>			
No impact to case.			
<b>What Should You Know?</b>			
<p>For benefit issuance involving an overpayment (recovery account) the pending claim will not show up in ancillary collections. Only recovery accounts with an active status are sent over to the ancillary system. Conversion did not convert pending recovery account information, as such, there will be no collections activation batch because these pending accounts will not exist in CalSAWS.</p> <p>The recovery accounts can be manually entered in to CalSAWS after Go-Live. Please follow your County's policies regarding this action before entering.</p>			
<b>CalSAWS Source/Reference</b>		CA-244121	

### 2.4.5.2 FISCAL HISTORY

Page Name	Fiscal History Search	CalSAWS Field Name(s)	N/A
<b>What Will You Experience?</b>			
Fiscal History does not have data. This table will not have historical information because the data is not being converted.			



The screenshot shows the CalSAWS Fiscal History Search page. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main menu has tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal (selected), Special Units, Reports, Client Corresp., and Admin Tools. The left sidebar shows 'Fiscal History' and 'Fiscal History Search'. The search form includes a 'Refine Your Search' section with fields for Organization Level (Case), Case Number, Benefit/Service Month, and Transaction Type. A 'Search' button is present. Below the search form, a table header is visible with columns: Benefit / Service Month, Trans Type, Trans Date, Issue Date, Control Number, Amt. Pgm Aid Code, Case Number, and Pay Code. A red box highlights the 'No Data Found' message in the search results area.

**Figure 2.4.31 – Fiscal History Search Page**

### How Will This Affect the Case?

No impact to case.

### What Should You Know?

There will be no data in the *Fiscal History* search for dates prior to your county's Go-Live.

### CalSAWS Source/Reference

CA-236297

## 2.4.5.3 TAX INTERCEPT INDICATOR

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experience?			
In CalSAWS, you will see an indicator called the Tax Intercept Indicator which was not present in CalWIN.			

<p>The <i>Tax Intercept</i> indicator serves to inform CalSAWS users that a claim has a recovery transaction with the action type of Tax Intercept (TI). In CalWIN, <i>Tax Intercept</i> indicators do not exist.</p> <p>Converted Recovery Accounts will have their <i>Tax Intercept</i> indicator set to “Y” if the claim has a recovery transaction(s) with the action type of Tax Intercept (TI), otherwise it will set to “N.”</p>	
<b>How Will This Affect the Case?</b>	
No Impact to ongoing cases.	
<b>What Should You Know?</b>	
Counties are encouraged to inform their Admin Services/Accounting/Recovery Units, if a claim has a “Tax Intercept recovery actions,” it will show a “Y” for the <i>Tax Intercept</i> indicator in the Claim Details.	
<b>CalSAWS Source/Reference</b>	N/A

## 2.4.6 REPORTS

### 2.4.6.1 REPORTS DATA NOT AVAILABLE FOR FIRST MONTH

<b>Page Name</b>	N/A	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
The list of CalWIN Counties reports will not be generated correctly for the first month after Go-Live because historical data required to generate the reports for prior months are not being converted.			
<b>How Will This Affect the Case?</b>			
No impact to case. Reports may not have appropriate data for a period of time.			
<b>What Should You Know?</b>			
This issue will be remediated as the CalSAWS system is used by Counties after Go-Live and the required data are populated within CalSAWS as part of regular casework. Reports for the month prior to Go-Live should be pulled from CalWIN and reports will be available in CalSAWS only after a full month in CalSAWS after Go-Live.			

As an interim measure, users will have to fetch the required data from CalWIN and manually update the required reports. The CalSAWS Team will host weekly/bi-weekly meetings after Go-Live to provide the required support discrepancies in the State/Fiscal Reports. (Documented as part of SCR CA-239788).

State	ABCD 350
State	CA 237 CW
State	CA 237 FC
State	CA 237 HA
State	CA 237 KG
State	CA 237 KG-F
State	FC1 – Continuum of Care Reform Facility Report
State	STAT 45
State	CA 800 ARC
State	CA 800 CCR PIA Report
State	CA 800 CCR RIA Report
State	CalWORKs Caseload Backup Report
State	CalWORKs Caseload Report
State	CW 115
State	CW 115 A
State	DFA 2
State	DFA 256 Detailed Report
State	TEMP 2035 EBT THEFT – Skimming
State	TEMP 2313 EBT THEFT – Scam
State	WINS Cert
State	CA 1037 Report

State	CA 253
State	CA 255
State	CA 812
State	CalHEERS Horizontal Integration Detail
State	CF 18
State	CF 296
State	CF 296 Line 6 Backup Report
State	CMSP 237
State	CMSP 237 Detailed Backup Report
State	DHCS CMS Performance Indicators Master Data Request
State	DHCS Renewals Master Request
State	DHCS Renewals Master Request Detail
State	DPA 482
State	DSS 466
State	FNS 209
State	FNS 209 Line 3b Backup Report
State	Recovery Account
State	RS 51
State	SOC 808 Backup Report
State	SOC 808
State	STAT 47
State	STAT 47 Part F Backup Report
State	WINS 2
State	WTW 25

State	WTW 25A
<b>Table 2.4-1 – List of CalWIN Counties Reports</b>	
CalSAWS Source/Reference	CA-239788

**2.4.6.2 DPA 266 (FRAUD INVESTIGATION ACTIVITY REPORT) – REPORTS HAVE NO DATA**

Page Name	N/A	CalSAWS Field Name(s)	N/A
<b>What Will You Experience?</b>			
DPA 266 (Fraud Investigation Activity Report) may have no data. The data is dependent on an ancillary data set provided by the County. If the County did not provide the data required for the report, it will not populate.			
<b>How Will This Affect the Case?</b>			
N/A			
<b>What Should You Know?</b>			
Not applicable/for user awareness only.			
CalSAWS Source/Reference	CA-238764		

## 2.4.7 OTHER

### 2.4.7.1 CASE SUMMARY FBU FIELD

Page Name	Case Summary	CalSAWS Field Name(s)	FBU
What Will You Experience?			
<p>The FBU field, in the CalFresh Program detail on the <b>Case Summary</b> page, will reflect as a “0” (zero) on converted CalFresh cases.</p>			
 <p>The screenshot shows the CalFresh Case Summary page. The FBU field is highlighted with a red box and contains the value 0. Other fields include Worker ID, Program Status (Active), RE Due Month (03/2023), Reporting Type (Semi-Annual Reporting), SAR Due Month (09/2022), Aid Code (09 - CalFresh), Meets ESAP Criteria (No), Public Assistance Indicator (No), Expedited Service (Yes), and Postponed Verif (No). A table at the bottom lists roles (MEM) and their status (Active).</p>			
How Will This Affect the Case?			
<p>This does not affect any Eligibility determinations.</p>			

Figure 2.4.32 – CalFresh Case Summary

What Should You Know?	
FBU field will reflect as a “0” (zero) on converted CalFresh cases.	
CalSAWS Source/Reference	CA-235828

#### 2.4.7.2 AAP CASE MEMBERS SPLIT

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>In most Adoption Assistance Program (AAP) cases in CalWIN, the case only has one (1) individual applying for aid on every AAP case. However, there are cases in CalWIN which have two (2) adopted siblings on the same AAP case.</p> <p>In CalSAWS, you will only see that one (1) adopted child per program is allowed.</p>			
How Will This Affect the Case?			
During conversion, CalWIN AAP cases with multiple members will be split into individual CalSAWS cases with one (1) individual per case.			
What Should You Know?			
It is recommended that Authorized County AAP users review the Workload Inventory after conversion to confirm that former CalWIN cases with multiple members have been split into individual cases in CalSAWS.			
CalSAWS Source/Reference	N/A		

#### 2.4.7.3 FOSTER CARE RESOURCES

Page Name	Foster Care Resource Search	CalSAWS Field Name(s)	N/A
What Will You Experience?			
In the <b>Foster Care Resource</b> Databank, when typing in a city to search for a specific person, ONLY resources from existing CalSAWS counties are shown.			

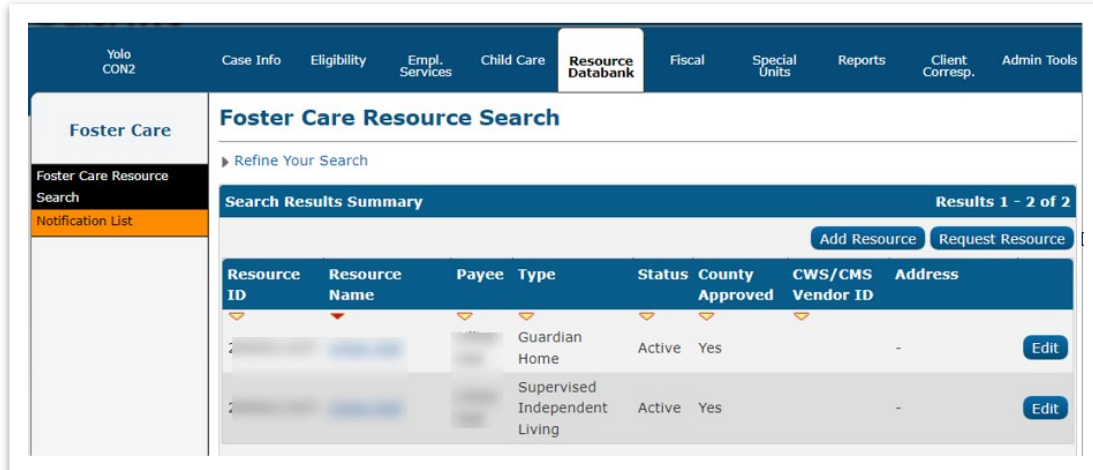


Figure 2.4.33 – Foster Care Resource Databank

### How Will This Affect the Case?

General search may not work and will require additional criteria.

### What Should You Know?

To see the CalWIN Loaded resource, you must know the name and type it in.

**Note:** An attempt with the city, state can be done, however, if you are not successful, attempt with the Name only.

#### To Search from the Case Summary Page

1. Place your cursor over *Resource Databank* on the **Global** navigation bar and select *Foster Care* from the **Local** navigator.
2. On the **Foster Care Resource Search** page, type in the Foster Care Resource Name.
3. Click the *Search* button.

#### To Search from the Placement Page

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

CalSAWS Source/Reference

CA-255377



#### 2.4.7.4 FOSTER CARE PAYROLL BENEFITS

<b>Page Name</b>	Main Payroll Foster Care Issuance Summary Main Payroll Foster Care Warrant Register Main Payroll Warrant Production Reconciliation Reports	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
Foster care benefits (including SILP benefits) aren't being issued throughout the month and the reports do not reflect issuances customers were used to receiving mid-month			
<b>How Will This Affect the Case?</b>			
These payroll issuances will not be run until the first business day of the following month, and the reports will reflect the issuances on the following day.			
<b>What Should You Know?</b>			
In CalSAWS, the Foster Care (FC) Main Payroll for Foster Care benefits (including SILP benefits) are generated on the first business day of the month following the payment benefit month (exemption: Alameda and Sacramento County's Main Payroll runs on the 5th business day of the month due to their child placement verification process). E.g., March FC benefits main payroll runs the 1st business day in April.			
<b>CalSAWS Source/Reference</b>		CA-253787	

#### 2.4.7.5 NA BACK 9

<b>Page/NOA Name</b>	NA Back 9	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
In CalWIN, any NOA containing multiple pages has the NA Back 9 on the back of each page of the multi-page NOA. In CalSAWS, the NA Back 9 is only present on the back of first page of each NOA, meaning NOAs with multiple pages will not contain the NA Back 9 on anything other than the first page.			

**YOUR HEARING RIGHTS**

You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing **before** an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh benefits will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing, check below:

Yes, lower or stop: ☐ Cash Aid ☐ CalFresh ☐ Child Care

**While You Wait for a Hearing Decision for:**

**Welfare to Work:**

You do not have to take part in the activities.

You may receive child care payments for employment and for activities approved by the county before this notice.

If we told you your other supportive services payments will stop, you will not get any more payments, even if you go to your activity.

If we told you we will pay your other supportive services, they will be paid in the amount and in the way we told you in this notice.

- To get those supportive services, you must go to the activity the county told you to attend.
- If the amount of supportive services the county pays while you wait for a hearing decision is not enough to allow you to participate, you can stop going to the activity.

**Cal-Learn:**

- You cannot participate in the Cal-Learn Program if we told you we cannot serve you.
- We will only pay for Cal-Learn supportive services for an approved activity.

**OTHER INFORMATION**

**Medi-Cal Managed Care Plan Members:** The action on this notice may stop you from getting services from your managed care health plan. You may wish to contact your health plan membership services if you have questions.

**Child and/or Medical Support:** The local child support agency will help collect support at no cost even if you are not on cash aid. If they now collect support for you, they will keep doing so unless you tell them in writing to stop. They will send you current support money collected but will keep past due money collected that is owed to the county.

**Family Planning:** Your welfare office will give you information when you ask for it.

**Hearing File:** If you ask for a hearing, the State Hearing Division will set up a file. You have the right to see this file before your hearing and to get a copy of the county's written position on your case at least two days before the hearing. The state may give your hearing file to the Welfare Department and the U.S. Departments of Health and Human Services and Agriculture. (W&I Code Sections 10850 and 10950.)

**TO ASK FOR A HEARING:**

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:

OR

- Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

**To Get Help:** You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

**HEARING REQUEST**

I want a hearing due to an action by the Welfare Department of \_\_\_\_\_ County about my:

☐ Cash Aid ☐ CalFresh ☐ Medi-Cal

☐ Other (list) \_\_\_\_\_

**Here's Why:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

☐ If you need more space, check here and add a page.

☐ I need the state to provide me with an interpreter at no cost to me. (A relative or friend cannot interpret for you at the hearing.)

My language or dialect is: \_\_\_\_\_

NAME OF PERSON WHOSE BENEFITS WERE DENIED, CHANGED OR STOPPED \_\_\_\_\_

BIRTH DATE \_\_\_\_\_ PHONE NUMBER \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

NAME OF PERSON COMPLETING THIS FORM \_\_\_\_\_ PHONE NUMBER \_\_\_\_\_

☐ I want the person named below to represent me at this hearing. I give my permission for this person to see my records or go to the hearing for me. (This person can be a friend or relative but cannot interpret for you.)

NAME \_\_\_\_\_ PHONE NUMBER \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_

NA BACK 9 (REPLACES NA BACK 8 AND EP 9) (REVISED 4/2013) - REQUIRED FORM - NO SUBSTITUTE PERMITTED

Figure 2.4.34 – Back of NOA

**How Will This Affect the Case?**

N/A

**What Should You Know?**

CalWIN County Customers may be expecting to see the NA Back 9 on all pages of their NOAs and will only see it on the back of the first page. County Eligibility and Hearings staff should also be aware of this difference between CalWIN and CalSAWS.

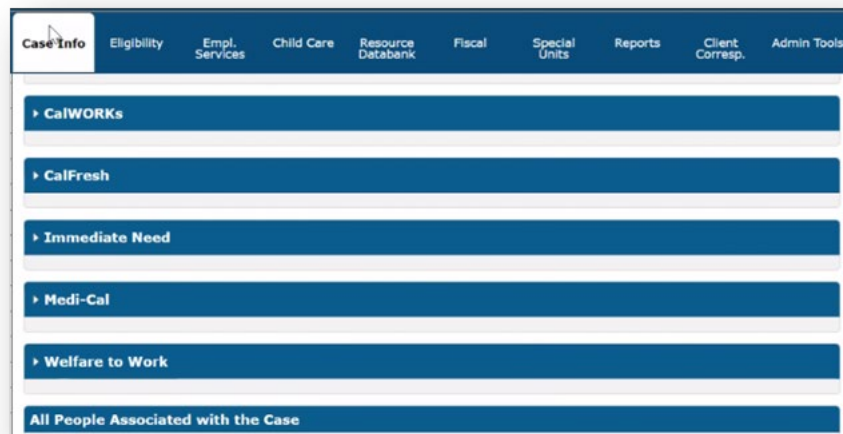
**2.4.7.6 MULTI-MONTH EDBC**

Page Name	N/A	CalSAWS Field Name(s)	N/A
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What Will You Experience?
In CalWIN when EDBC for multiple months, eligibility notices will contain detail for each month that EDBC was run. In CalSAWS, when EDBC is run for multiple months the eligibility notice will only contain detail for the first month of that run.
How Will This Affect the Case?
N/A
What Should You Know?
<p>Eligibility detail for any months beyond the first month of a multi-month run, will be present in the system, but that detail will not appear on the eligibility notice. Therefore, if you expect that eligibility may differ for months beyond the first month of eligibility, users should run EDBC for each individual month, so individual eligibility notices are generated to reflect differences from month-to-month.</p> <p>There is a pending enhancement/SCR (CA-224153) to add eligibility detail for additional months beyond the first month of a multi-month EDBC run.</p>

#### 2.4.7.7 CHILDCARE ACTIVITY STATUS

Page Name	Case Summary	CalSAWS Field Name(s)	N/A
What Will You Experience?			
After conversion, childcare activity program blocks in CalWIN that were Active are migrated with a status of <i>Discontinued</i> or aren't migrated at all (empty blocks).			



**Figure 2.4.35 – Case Summary Page**

### How Will This Affect the Case?

This does not impact Eligibility or member benefits. However, it prevents a worker from viewing all of the activity program blocks or their correct status.

### What Should You Do?

This is for awareness only. A backend data change will address this issue.

**CalSAWS  
Source/Reference**

CA-258840

## 2.4.7.8 CHILD CARE APPLICATION DATE

Page Name		CalSAWS Field Name(s)	Application Date
	<ul style="list-style-type: none"> <li>Application Registration Summary</li> <li>Program History</li> </ul>		
What Will You Experience?			
Application dates on the <b>Application Registration Summary</b> and <b>Program History</b> pages do not align on some converted cases with Child Care data.			

The screenshot shows the 'Application Registration Summary' page. The top navigation bar includes 'Contra Costa CON17', 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar has 'Case Summary', 'Person Search', 'EBT Account Search', and 'Case Summary'. The main content area displays 'Application Registration Summary' with a red asterisk indicating required fields. Below this, it shows 'Source: In Person', 'App Date: 01/27/2017', 'Case Number: 1B02M96', and 'App Status: Complete'. There are 'Print' and 'Close' buttons at the top right.

Figure 2.4.36 – Application Registration Summary Page

The screenshot shows the 'Case Summary' page. The top navigation bar is the same as Figure 2.4.36. The left sidebar has 'Case Summary', 'Legacy Case', 'Confidentiality', 'ICT Summary', 'IAT Summary', 'Customer Contact History', 'SB 87', 'Invoice History', 'Linkages', 'General Ledger', 'Valuable History', and 'Point Of Service'. The main content area displays 'Case Summary' with a red asterisk indicating required fields. Below this, it shows 'Worker: Contra Costa Conversion', 'Worker ID: 07LS060000', 'Program Status: Active', 'FBU: 0', 'Primary Applicant/Recipient', 'Language', 'Phone Number', 'Email', and 'Application Date: 10/01/2018'. There is a table with columns 'Name', 'Role', 'Role Reason', 'Status', and 'Status Reason' showing two rows: 'MEM Parent Active' and 'MEM Child Active'.

Figure 2.4.37 – Case Summary Page

### How Will This Affect the Case?

The misalignment of dates will have no impact on eligibility.

### What Should You Know?

There is no application date for Child Care in CalWIN as it is a subprogram of CalWORKs, not a separate program. Since there is no Child Care application date in CalWIN to map to CalSAWS, the most recent CalWORKs application date is used to populate the Application Date on the Child Care program section of the **Case Summary** page. If you review the Application Date of the CalWORKs program on the case, you will see it is the same as the Application Date for Child Care.

### CalSAWS Source/Reference

CA-254800

### 3 APPENDIX

- CalWIN\_ISS\_GLP\_Appendix B\_CalSAWS Batch Inventory
- CalWIN\_ISS\_GLP\_Appendix C\_CalSAWS Batch Calendar 2023
- CalWIN\_ISS\_GLP\_Appendix D\_CalSAWS Reports Overview
- CalWIN\_ISS\_GLP\_Appendix F\_Master Training Plan\_CalSAWS WBTs
- CalWIN\_ISS\_GLP\_Appendix J\_Qlik Report Subscription
- CalWIN\_ISS\_GLP\_Appendix H\_CalSAWS Terminology
- CalWIN\_ISS\_GLP\_Appendix L\_CalWIN\_To\_CalSAWS Reports Mapping