



CalWIN ISS

Implementation Support Services

Go-Live Packet (GLP) – Appendix F –
CalSAWS Web Based Trainings (WBT) List

September 21, 2022

CalSAWS Implementation Support Services

Go-Live Packet (GLP) – Appendix F – CalSAWS Web Based Trainings (WBT) List

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/21/22	.01	Published as Appendix F for the Go-Live Packet (GLP) – Original Document CalWIN ISS DEL 08.01: Master Training Plan – Appendix D: CalSAWS WBTs (final version dated 08/05/22).	Training Team

TABLE OF CONTENTS

WBT COURSES CALWIN ISS (LIST AND DESCRIPTION OF AVAILABLE WBT COURSES IN THE LMS)..... 4

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
001	Orientation	03	CalSAWS Navigation	The purpose of this module is to provide new users with information in order to understand the basic principles of how to navigate through CalSAWS.	<ul style="list-style-type: none"> Logging in and out of CalSAWS The Homepage Navigation principles Page types Security features
001	Orientation	04	Utilities	The purpose of this module is to introduce the Utilities bar and its functionality to staff who are new to CalSAWS.	<ul style="list-style-type: none"> Accessing outside links and resources through the Resource tab Accessing case comments through the Journal Accessing various channels of help through Online Help
001	Orientation	05	Case Information	The purpose of this module is to provide instructions for reviewing case information in CalSAWS.	<ul style="list-style-type: none"> How to search for a case General case information General person information
001	Orientation	06	Task Management	The purpose of this module is to provide new users with instructions for managing tasks in CalSAWS.	<ul style="list-style-type: none"> Creating and assigning tasks Searching for assigned tasks Managing tasks
001	Orientation	07	Scheduling and Appointments	The purpose of this module is to provide instructions on how to schedule and manage participant appointments.	<ul style="list-style-type: none"> Searching for and viewing a worker's schedule Scheduling an appointment for a participant Generating an appointment letter Updating participant appointment participation Editing participant appointments
001	Orientation	08	Lobby Management	The purpose of this module is to provide users with instructions on how to manage and track clients waiting to be seen by a worker.	<ul style="list-style-type: none"> Adding clients to the Traffic Log Updating client status Using and managing the Message Center
001	Orientation	09	Client Correspondence	The purpose of this module is to provide instructions on how client correspondence is processed and managed in CalSAWS.	<ul style="list-style-type: none"> Generate documents from a form template Print and save documents View documents that have been sent to the applicant/participant/beneficiary Reprint and electronically sign documents
001	Orientation	10	Reports	The purpose of this module, is to provide instructions for viewing and generating reports.	<ul style="list-style-type: none"> View scheduled Reports using the Reports Overview Job Aid Generate On Request Reports
002	Eligibility General	01	Root Questions	The purpose of this module is to provide DPSS employees with instructions on the interactive interview features and Root Questions of CalSAWS. This module includes pre-selected pages that you will most likely navigate to during the data collection process to record applicants' responses. The rest of the data collection pages can be found in the Case Maintenance module in the DPSS Eligibility course.	<ul style="list-style-type: none"> Navigate to Root Questions Add an applicant's responses to Non-Financial Root questions Add an applicant's responses to Financial Root questions Complete Non-Financial Detail page and complete Financial Detail pages
002	Eligibility General	02-A	Case Creation and Completion Part A	The purpose of this module is to provide instructions and practice on how to enter a case into CalSAWS. The goal of this module is to highlight the process of reviewing case demographics, along with entering non-financial and financial details that apply to programs being applied for. You will receive instructions on the program you work in during your program-specific course.	<ul style="list-style-type: none"> Review case demographics Set up an issuance method Answer the Non-Financial Root Questions Complete the Non-Financial Detail pages Answer the Financial Root Questions Complete the Financial Detail pages

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
002	Eligibility General	02-B	Case Creation and Completion Part B	This is the second part of your Eligibility General - Case Creation and Completion Part B module. Eligibility General - Case Creation and Completion Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> Case Creation and Completion (continued) Assessment
002	Eligibility General	03	Verifications and Documents/NOAs	The purpose of this module is to provide DPSS and DCFS Workers with instructions for reviewing pending verifications, and generating Notices of Actions (NOAs).	<ul style="list-style-type: none"> Complete EDBC verifications Generate a notice of action
002	Eligibility General	04	EDBC	The purpose of this module is to provide DPSS Eligibility Workers with instructions on how to review and accept Eligibility Determination Benefit Calculation (EDBC).	<ul style="list-style-type: none"> Run and review an EDBC Reconcile an EDBC Overpayment/Over Issuance Override an EDBC Run a manual EDBC Troubleshoot EDBC results
002	Eligibility General	05	Reevaluation and Periodic Reporting	The purpose of this module is to provide Eligibility Workers with information on scheduling, managing and processing reevaluations (RE) and periodic reports (PR) in CalSAWS.	<ul style="list-style-type: none"> Understand Scheduling Manage and process RE packets and PR
002	Eligibility General	06	e-Application Data Validation	The purpose of this module is to provide instructions for validating data received via applications submitted electronically to LA County through CalSAWS.	<ul style="list-style-type: none"> Validate data received electronically by CalSAWS
002	Eligibility General	07	MEDS Alerts	The purpose of this module is to provide instructions on how to view MEDS alerts in CalSAWS.	<ul style="list-style-type: none"> Use the worklist to view MEDS alerts assigned to you Use the MEDS Alert Search page to find alerts View MEDS alert details Mark MEDS alerts as completed
002	Eligibility General	08	EBT Card Request	The purpose of this module is to provide an overview of EBT accounts in CalSAWS.	<ul style="list-style-type: none"> Assign EBT accounts for new cases Assign EBT accounts for existing cases Add secondary card holders to an EBT account
002	Eligibility General (for Foster Care only - time not included in course completion)	09A	Case Creation and Completion Part A - DCFS	The purpose of this module is to provide instructions on how to create a Child Protective Services (CPS) case in CalSAWS.	<ul style="list-style-type: none"> Search for existing people in the system Complete data collection for a CPS case Add a new person to a case and an existing CPS program Track a paper case
002	Eligibility General (for Foster Care only - time not included in course completion)	09B	Case Creation and Completion Part B - DCFS	This is the second part of your General Eligibility Case Creation and Completion module. General Eligibility Case Creation and Completion Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> Create CPS case (continued) Assessment
003	Eligibility Supervisor	01	Case Review and EDBC Authorizations	The purpose of this module is to provide Eligibility Supervisors with instructions for authorizing EDBC results.	<ul style="list-style-type: none"> Authorizing EDBC results - Supervisor
003	Eligibility Supervisor	02	Approve a Fraud Referral	The purpose of this module is to provide instructions for approving fraud referrals in CalSAWS.	<ul style="list-style-type: none"> Review and approve fraud referrals
004	Clerical Support	01	Application Registration	The purpose of this module is to provide instructions for registering an application and generating an application number in CalSAWS.	<ul style="list-style-type: none"> Generate an application number by completing the Application Registration page
004	Clerical Support	02	Case Establishment	The purpose of this module is to provide instructions on CIN clearing and establishing a case in CalSAWS.	<ul style="list-style-type: none"> Access and link an application Add applicants Assign CINs and addresses to all applicants Add programs being applied for Assign an intake worker to the case

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
004	Clerical Support	03	Workload Reassignment	The purpose of this module is to provide instructions to reassign cases in CalSAWS.	<ul style="list-style-type: none"> Reassign part or all of an individual worker's caseload to another individual worker Reassign part or all of an individual or multiple worker's caseload to worker(s), office(s) or a single unit Reassign a single case to a worker, unit, or office Reassign part or all of an office's caseload to other worker(s), office(s), or a single unit Cancel pending workload assignments
004	Clerical Support	04	Issuing and Printing Valuables	The purpose of this module is to provide Clerical workers with instructions for issuing and printing valuables in CalSAWS.	<ul style="list-style-type: none"> Issue and print a valuable Issue a valuable to a non-customer Issue and print an EBT card
004	Clerical Support	05	Barcode Scanning	The purpose of this module is to provide employees with an overview of barcoded documents and instructions on how to scan documents with barcodes into CalSAWS.	<ul style="list-style-type: none"> Understand the basics of barcoding in CalSAWS Describe barcode equipment Troubleshoot potential problems when using barcode equipment
004	Clerical Support	06	Reapplication	The purpose of this module, is to provide instructions for processing applications for beneficiaries applying, and reapplying, for programs on an existing CalSAWS case.	<ul style="list-style-type: none"> Process applications for a new program on an existing case Process reapplications for a discontinued or denied programs on an existing case Process applications for a CalFresh recertification
004	Clerical Support	07	Employment Services Clerical Pending Assignment	The purpose of this module is to provide instructions for manually assigning a program to a worker and completing the work registration process.	<ul style="list-style-type: none"> Describe the CalSAWS Work Registration process Assign a program to a worker Update a participant's program status Add an appraisal activity Describe the CalSAWS Work Registration process for a sanctioned participant
005	Clerical Support Supervisor	01	Valuables Inventory Management	The purpose of this module is to provide an overview of valuables and instructions for how to manage valuables in CalSAWS.	<ul style="list-style-type: none"> Add Valuables to Inventory Remove and return Valuables from Inventory Access Valuables Reports from CalSAWS to helped reconcile Inventory
006	Eligibility CalFresh	01	Intake - Non-Financial	The purpose of this module is to provide Eligibility Workers (EW) with instructions on receiving and processing your assigned intake task.	<ul style="list-style-type: none"> Review your intake tasks Maintain Case Demographics Set up an Issuance Method Answer Non-Financial Root Questions Complete Non-Financial Detail pages
006	Eligibility CalFresh	02	Intake - Financial	The purpose of this module is to provide Eligibility Workers (EW) with instructions on receiving and processing your assigned intake task.	<ul style="list-style-type: none"> Answer Financial Root Questions Complete Financial Detail pages Review EDBC Review the Expedited CalFresh process
006	Eligibility CalFresh	03	Approved	The purpose of this module is to provide Eligibility Workers with instructions for processing CalFresh approved case actions.	<ul style="list-style-type: none"> Process a Semi-Annual Report (SAR 7) Process a Recertification (RC) Process a Mid-Period Changes (SAR 3) Process a Negative Action
006	Eligibility CalFresh	04	Additional Topics	The purpose of this module is to provide Eligibility Staff with information on processing various case actions.	<ul style="list-style-type: none"> Create a CFET record Enter a Non-Compliance record Process CFAP eligibility Access the pages related to ABAWD eligibility processing

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
006	Eligibility CalFresh	05	Transitional CalFresh	The purpose of this module, is to provide Eligibility Workers with instructions on the Transitional CalFresh (TCF) process.	<ul style="list-style-type: none"> Understand how CalSAWS determines a Transitional CalFresh case Process a TCF/CF Re-Certification
006	Eligibility CalFresh	06	Nutrition Benefit	The purpose of this module is to provide Eligibility Workers with instructions for processing SSI Cash-Out Reversals and evaluating individuals for the Nutrition Benefit program in CalSAWS.	<ul style="list-style-type: none"> Process SSI Cash-Out reversals Evaluate persons for the Nutrition Benefit program (LA County)
007	Eligibility CalWORKs	01-A	Intake Part A	The purpose of this module is to provide instructions for processing a CalWORKs Intake application in CalSAWS.	<ul style="list-style-type: none"> Review CalWORKs program information Understand the data collection process Answer Non-Financial Root Questions Complete non-financial data collection pages Answer Financial Root Questions Complete financial and data collection pages
007	Eligibility CalWORKs	01-B	Intake Part B	This is the second part of your Eligibility CalWORKs Intake module. Eligibility CalWORKs Intake Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> Processing a CalWORKs (continued) Assessment
007	Eligibility CalWORKs	02	Intake Additional Pages	The purpose of this module is to provide instructions for running EDBC and completing additional pages related to a CalWORKs intake case.	<ul style="list-style-type: none"> Review EDBC results Process a Diversion Program Process an Immediate Need Payment Process a Homeless program Review Pregnancy Detail page Review Time Limit Summary page Review Work Registration Detail page Review Immunization Detail page Add a Deemed Eligibility record
007	Eligibility CalWORKs	03	Approved	The purpose of this module is to provide DPSS CalWORKs Approved Eligibility Workers with instructions for processing a CalWORKs Re-Determination.	<ul style="list-style-type: none"> Describe the Redetermination (RD) process in CalSAWS Complete non-financial and financial data collection for RD Review EDBC results Update an appointment on the Customer Schedule page
007	Eligibility CalWORKs	04	Additional Pages	The purpose of this module is to provide CalWORKs Approved workers with instructions for processing various case actions. Upon completion of this module,	<ul style="list-style-type: none"> Edit eligibility information View Issuance History Process a SAR 7 Take a Negative action Review Citizenship Information Add a Deemed Eligibility record
008	Eligibility Medi-Cal	01-A	MAGI Intake Part A	The purpose of this module is to provide instructions for processing a MAGI Medi-Cal intake in CalSAWS.	<ul style="list-style-type: none"> Access a Medi-Cal Intake task from the Worklist Answer Non-Financial Root Questions View, add and edit applicant's non-financial information Answer Financial Root Questions View, add and edit applicant's financial information Add a request for Retroactive Medi-Cal Request a MAGI determination via CalHEERS Review MAGI determination results Run, accept and save a Medi-Cal EDBC Create a journal entry and complete a task Add a Deemed Eligible infant to a MAGI Medi-Cal program

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
008	Eligibility Medi-Cal	01-B	MAGI Intake Part B	This is the second part of your Eligibility Medi-Cal MAGI Intake module. Eligibility Medi-Cal MAGI Intake Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> • MAGI Eligibility Intake (continued)
008	Eligibility Medi-Cal	01-C	MAGI Intake Part C	This is the third and final part of your Eligibility Medi-Cal MAGI Intake module. Eligibility Medi-Cal MAGI Intake Part C allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> • MAGI Eligibility Intake (continued) • Assessment
008	Eligibility Medi-Cal	02-A	Non-MAGI Intake Part A	The purpose of this module is to provide instructions for processing a Non-MAGI Medi-Cal Intake in CalSAWS.	<ul style="list-style-type: none"> • Input Non-Financial and Financial Data • Request a Full Medi-Cal Hierarchy Test • Determine eligibility and benefits • Troubleshoot EDBC Results • Enter Program-Specific Information for DDSD, Sneede v Kizer, QMB/SLMB, Pickle and ABD; • Review cases • Add Deemed Eligible Infant to a Medi-Cal program
008	Eligibility Medi-Cal	02-B	Non-MAGI Intake Part B	This is the second part of your Eligibility Medi-Cal Non-MAGI Intake module. Eligibility Medi-Cal Non-MAGI Intake Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> • Non-MAGI Intake (continued) • Assessment
008	Eligibility Medi-Cal	03	Long Term Care Intake	The purpose of this module is to provide instructions for processing a Long Term Care Medi-Cal program in CalSAWS.	<ul style="list-style-type: none"> • Process an LTC Medi-Cal program • Add an LTC program to an active case
008	Eligibility Medi-Cal	04	Hunt v. Kizer	The purpose of this module is to provide DPSS employees with instructions for processing Medi-Cal programs with a Hunt v. Kizer component.	<ul style="list-style-type: none"> • Navigate to the Hunt v. Kizer Expense List page • Add, edit and remove entries on the Hunt v. Kizer Expense Detail page • Override Medi-Cal Share of Cost • Generate a manual Notice of Action
008	Eligibility Medi-Cal	05-A	Minor Consent Part A	The purpose of this module is to provide DPSS employees with instructions for processing a Minor Consent Medi-Cal program in CalSAWS.	<ul style="list-style-type: none"> • Access a newly-assigned Medi-Cal program • Set up Minor Consent; flag a case • Answer Non-Financial Root Questions • View, add and edit an applicant's non-financial information • Answer Financial Root Questions • Run, accept and save a Minor Consent EDBC • Discontinue a Minor Consent Medi-Cal program
008	Eligibility Medi-Cal	05-B	Minor Consent Part B	This is the second part of your Eligibility Medi-Cal Minor Consent module. Eligibility Medi-Cal Minor Consent Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> • Part A (continued) • Assessment
008	Eligibility Medi-Cal	06	Approved	The purpose of this module is to provide instructions for managing approved Medi-Cal programs in CalSAWS.	<ul style="list-style-type: none"> • Update data collection pages • Process a Medi-Cal program Redetermination • Discontinue a program member • Discontinue a Medi-Cal program • Rescind a Medi-Cal discontinuance • Add a Deemed Eligible infant to a Medi-Cal program

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
009	Eligibility General Relief	01	Intake	The purpose of this module is to provide DPSS General Relief (GR) Intake Eligibility Workers with instructions for completing the General Relief intake process in CalSAWS.	<ul style="list-style-type: none"> • Understand the General Relief program process in CalSAWS • Set up an issuance method • Maintain Case Demographics • Enter Non-Financial program information • Enter Financial program information • Enter Employability status • Complete an MSUDRP Pre-Screening • Run and review EDBC
009	Eligibility General Relief	02	Approved	The purpose of this module is to provide DPSS General Relief Approved Workers with instructions for processing various case actions.	<ul style="list-style-type: none"> • View Issuance History • Add a Non-Compliance • Process a Quarterly Report • Process an Annual Agreement
010	WTW (Employment Services)	01	Appraisal Process	The purpose of this module is to provide instructions for completing an appraisal activity in CalSAWS.	<ul style="list-style-type: none"> • Describe the CalSAWS work registration process • Review program and participant information • View, add, and edit employment data, barriers data, degree, license, and certificate data, self-initiated program data and skills data • Add a learning disability screening record
010	WTW (Employment Services)	02	Assign Customer Activities	The purpose of this module is to provide instructions for viewing, adding and editing customer activities, assigning participants to activities and generating activity forms.	<ul style="list-style-type: none"> • View, add and edit customer activities • Assign participants to activities • Generate activity forms • Update a participant's activity status
010	WTW (Employment Services)	03	Assessment Process	The purpose of this module is to provide instructions for completing an assessment activity in CalSAWS and generating the related forms.	<ul style="list-style-type: none"> • Describe the Assessment process • Add an assessment activity • Generate the assessment forms • View, add and edit assessment results • Update an assessment activity status • Link an assessment result to a different assessment provider
010	WTW (Employment Services)	04	Activity Management	The purpose of this module is to provide instructions for managing customer activities in CalSAWS.	<ul style="list-style-type: none"> • Manage customer progress reporting • Manage job development activities • Manage exemptions • View and edit WTW time limit information
010	WTW (Employment Services)	05	Good Cause for Non-Compliance and Sanction (aka Non-Compliance and Good Cause)	The purpose of this module is to provide instructions for managing participant Non-Compliance in CalSAWS.	<ul style="list-style-type: none"> • Describe the Non-Compliance process • Initiate the Non-Compliance process • Update a program status for Non-Compliance • Add an Activity Agreement • Add a Non-Compliance outreach record • Record Good Cause for Non-Compliance • Describe the sanction process • Add a curing sanction activity • Generate a compliance plan • Cure a sanction

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
010	WTW (Employment Services)	06	Supportive Services	The purpose of this module is to provide instructions for issuing supportive services through CalSAWS. When a participant requires assistance related to the WTW program, you use supportive services to provide assistance, including: ancillary payments and transportation.	<ul style="list-style-type: none"> • View, add, edit and remove Needs • View, add and edit Service Arrangements • Create Payment Requests • Approve Payment Requests • Create Valuable Requests • Approve Valuable Requests • Describe how overpayments are created for Employment Services programs
010	WTW (Employment Services)	07	Work Participation Rate (WPR)	The purpose of this module is to provide an overview of the CalSAWS Work Participation Rate (WPR) calculation process, as well as instructions for viewing, adding and editing records that impact WPR.	<ul style="list-style-type: none"> • Describe the CalSAWS WPR calculation process • Calculate a participant's unmet WPR hours using the WEX/CS worksheet • Track sanctions for WPR • Track child under one exclusions for WPR • Track vocational education participation months for WPR • Track job readiness participation for WPR
010	WTW (Employment Services)	08	OCAT for CalSAWS Users	The purpose of this module is to provide Employment Services staff with an overview of the Online CalWORKs Appraisal Tool (OCAT) referral functionality in the CalSAWS.	<ul style="list-style-type: none"> • Add an OCAT Referral • Submit an OCAT Referral • Review OCAT Recommendations
012	Eligibility Cal-Learn	01	Cal-Learn	The purpose of this module is to provide DPSS employees and contracted AFLP staff with instructions for managing a Cal-Learn program in CalSAWS.	<ul style="list-style-type: none"> • Describe how a Cal-Learn program is created in CalSAWS • Review the Pending Unassigned Employment Services Program List page • Assign a primary worker (usually an Adolescent Family Life Program; worker) to a Cal-Learn program • Assign a secondary worker to a Cal-Learn program • Add a school attendance record • Update Cal-Learn progress • Issue bonuses • Add sanctions • Update the Cal-Learn program status
013	Eligibility RCA	01	Intake	The purpose of this module is to provide instructions for processing a Refugee Cash Assistance (RCA) intake in CalSAWS.	<ul style="list-style-type: none"> • Answer Non-Financial Root Questions • Complete non-financial data collection pages • Answer Financial Root Questions • Complete financial data collection pages
013	Eligibility RCA	02	Intake Additional Pages	The purpose of this module is to provide instructions for entering additional pages related to an RCA approved case into CalSAWS.	<ul style="list-style-type: none"> • Enter employment information • Enter income information • Enter property information • Review and generate pending verification information
013	Eligibility RCA	03	Approved	The purpose of this module is to provide instructions for completing work on an approved RCA case.	<ul style="list-style-type: none"> • Enter Non-Financial Root Questions and Detail pages related to a pregnancy • Update Case Information based on the SAR 7 Report
014	CAPL	01	Intake	The purpose of this module is to provide County CAPL Eligibility Workers with instructions on setting up an issuance method, reviewing case demographics, entering customer information during and intake interview, and reviewing Eligibility Determination and Benefit Calculation results.	<ul style="list-style-type: none"> • Describe the CAPL program process in CalSAWS • Set up an Issuance Method • Maintain Case Demographics • Enter Non-Financial case information • Enter Financial case information • Review the Verification List page and review EDBC results

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
014	CAPI	02	Approved	The purpose of this module is to provide County CAPI Approved Workers with instructions for processing various case actions and review program information.	<ul style="list-style-type: none"> • Complete a CAPI Re-determination • Process a Negative Action • Create an Overpayment • Report Changes • View Benefit Issuances • Troubleshoot EDBC results
015	Child Care	01	Managing Child Care Requests	The purpose of this module is to provide County workers with instructions for managing child care requests within CalSAWS.	<ul style="list-style-type: none"> • Describe child care request functionality • Search for requests • Add a request • Edit or update a request record
015	Child Care	02	Case Management	The purpose of this module is to provide County workers with instructions for reviewing the Child Care program within CalSAWS.	<ul style="list-style-type: none"> • Search for existing Child Care authorizations • View Child Care Authorizations • View the Child Care Program Status
015	Child Care	03	Payment Tracking	The purpose of this module is to provide County workers with instructions for reviewing and tracking child care payments in CalSAWS.	<ul style="list-style-type: none"> • View existing payments
016	Hearings	01	County Hearing Records	The purpose of this module is to provide instructions on searching and processing a County hearings record.	<ul style="list-style-type: none"> • Search for a hearing • Process a hearing • Edit a hearing • Resolve a hearing
017	Fiscal	01	Benefit Issuance	The purpose of this module is to provide an overview of CalSAWS issuance and instructions to conduct issuance activities in CalSAWS.	<ul style="list-style-type: none"> • Describe the CalSAWS issuance process • Search for, update and reissue an issuance • Manage payment requests
017	Fiscal	02	Electronic Benefit Transfer (EBT)	The purpose of this module is to describe EBT functionality in CalSAWS and give instructions to conduct an EBT card transaction search.	<ul style="list-style-type: none"> • Use EBT pages • Understand EBT functionality in CalSAWS • Manage EBT accounts • Conduct an EBT card transaction search
017	Fiscal	03	Recovery Accounts	The purpose of this module is to provide users with instructions to conduct benefit recovery activities in CalSAWS.	<ul style="list-style-type: none"> • Describe recovery accounts in CalSAWS • Activate recovery accounts • Generate Notices of Action • Terminate, suspend and void recovery accounts • Post a repayment transaction transfer • Refund transactions • View relevant Treasurer Tax Collector pages
018	Fiscal Supervisor	01	Supervisor Approvals	The purpose of this module is to provide instructions on how to approve fiscal activities in CalSAWS.	<ul style="list-style-type: none"> • Approve issuance overrides • Request an affidavit • Conduct a fiscal history search
019	QAQC	01	Create and Update a QA/QC Batch	The purpose of this module is to provide DPSS and DCFS employees with instructions for creating a Quality Assurance or Quality Control batch.	<ul style="list-style-type: none"> • Create a QA/QC batch
019	QAQC	02	QA Random Sample Search	The purpose of this module is to provide DPSS and DCFS employees with instructions for running a QA random sample search.	<ul style="list-style-type: none"> • Run a QA random sample search
019	QAQC	03	Quality Review Details	The purpose of this module is to provide DPSS and DCFS employees with instructions for searching for, viewing, adding and updating quality review details.	<ul style="list-style-type: none"> • Search for a quality review case • Complete and update the Quality Review Detail page

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
019	QAQC	04	Quality Review Assignment	The purpose of this module is to provide DPSS and DCFS employees with instructions for assigning and reassigning quality review cases.	<ul style="list-style-type: none"> Assign and reassign a quality review case to a single reviewer Assign quality review cases to multiple reviewers
019	QAQC	05	Home Call Referrals and Interview Details	The purpose of this module is to provide DPSS and DCFS employees with instructions for using the CalSAWS home call referral functionality.	<ul style="list-style-type: none"> Submit a home call referral Complete the Interview Detail page
019	QAQC	06	Quality Review Findings and Notes	The purpose of this module is to provide DPSS and DCFS employees with instructions for adding quality review finding details and notes.	<ul style="list-style-type: none"> Add and edit a quality review finding Utilize a computational worksheet Add quality review notes
019	QAQC	07	Update Case Review Records	The purpose of this module is to provide DPSS and DCFS employees with instructions for updating a case review record.	<ul style="list-style-type: none"> Update a case review record Approve or disagree with findings Escalate quality review cases to first and second level disagreements
020	Resource Databank	01	Enter Resource	The purpose of this module is to provide instructions for County employees on entering resources into the Resource Databank in CalSAWS.	<ul style="list-style-type: none"> Conduct a resource search Add a resource Add a contact to the Notification List page
020	Resource Databank	02	Maintain Resource	The purpose of this module is to provide County employees with instructions for maintaining resources in the Resource Databank in CalSAWS.	<ul style="list-style-type: none"> Edit resources Approve resources for County use Add an employer Add a job order Manage resource requests
020	Resource Databank	03	Troubleshoot Duplicate Resources	The purpose of this module is to provide instructions on troubleshooting and locating duplicate resources within the Resource Databank in CalSAWS.	<ul style="list-style-type: none"> Research search result matches (duplicate resources) Update a resource's status to closed
020	Resource Databank	04	Add Service, Activity and Class Performance Information	The purpose of this module is to provide instructions on adding, viewing and editing services, activity and class performance information.	<ul style="list-style-type: none"> Add, view, and edit: Service information, Activity information, and Class performance information
020	Resource Databank	05	RDB Supervisor	The purpose of this module is to provide RDB Supervisors with instructions for reviewing and managing RDB Maintainer workloads, processing vendor information and notifying other Counties of resource changes.	<ul style="list-style-type: none"> Access and review the RDB Workload Inventory Review and manage workload reassignments Manage a list of vendor information Use the County Impact List page to notify Counties of resource changes
020	Resource Databank	06-A	RDB for Foster Care	This is a two part module. The purpose of Part A is to provide instructions on viewing DCFS related information in the Resource Databank.	<ul style="list-style-type: none"> Viewing DCFS related information in the Resource Databank Search, view, and maintain a resource
020	Resource Databank	06-B	Maintain Resource	This is a two part module. The purpose of Part B is to provide instructions for maintaining Resource Databank information.	<ul style="list-style-type: none"> Viewing DCFS related information in the Resource Databank Search, view, and maintain a resource
021	Security/Administrative Support	01-A	Maintain Office, Staff and Position Part A	The purpose of this module is to provide County employees with instructions for managing staff, office and position information in CalSAWS.	<ul style="list-style-type: none"> Search, add and edit: staff member information, offices, sections, units, positions Assign staff to a position in CalSAWS
021	Security/Administrative Support	01-B	Maintain Office, Staff and Position Part B	This is the second part of your Security Administrative Support-Maintain Office, Staff and Position Part B module. Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> Part A (continued) Assessment
021	Security/Administrative Support	02	Security Rights and User Access	The purpose of this module is to provide County employees with instructions for entering and maintaining user security access to CalSAWS.	<ul style="list-style-type: none"> Understand how security is set up in CalSAWS Create security roles Create and manage CalSAWS user access

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
021	Security/Administrative Support	03	Flag Creation	The purpose of this module is to provide County employees with instructions for entering and maintaining case flags in CalSAWS.	<ul style="list-style-type: none"> Search, add and edit case flags
021	Security/Administrative Support	04	County Announcements	The purpose of this module is to provide County employees with instructions for entering and maintaining County announcements in CalSAWS.	<ul style="list-style-type: none"> Add and edit County announcements
021	Security/Administrative Support	05	Manage Worker Schedule	The purpose of this module is to provide DPSS and DCFS employees with instructions for entering and maintaining workers' schedules and availability in CalSAWS.	<ul style="list-style-type: none"> Manage worker schedules and availability Add and edit daily worker assignment designation
021	Security/Administrative Support	06	Task Management	The purpose of this training program is to provide end-users with an overview of the administrative Task Management functionality in the CalSAWS System.	<ul style="list-style-type: none"> Access and edit task types Access and edit automated actions Search for task banks and edit details Search for task reassignments and edit details View task reassignment results
022	Simulation	01	Simulation Environment	The purpose of this module is to provide County employees with instructions for using the Simulation environment to simulate and troubleshoot CalSAWS cases.	<ul style="list-style-type: none"> Describe the functionality of the Simulation environment and how it works in conjunction with CalSAWS Copy cases from CalSAWS to the Simulation environment Access copied cases in the Simulation environment
023	Special Investigations (Fraud)	01	Search, Create and Update Special Investigations	The purpose of this module is to provide Special Investigations Staff with an overview of the Special Investigations pages found within CalSAWS.	<ul style="list-style-type: none"> Understand the functionality of special investigation pages that support the Welfare Fraud Prevention and Investigation process Search for a special investigation Add a special investigation Edit special investigation details Review the Special Investigation Unit (SIU) referral inventory Change the investigation status
023	Special Investigations (Fraud)	02	Evidence Records	The purpose of this module is to provide Special Investigations Staff with instructions for recording evidence in the Special Investigations pages in CalSAWS.	<ul style="list-style-type: none"> View, add and edit/update evidence records
023	Special Investigations (Fraud)	03	Warrant Records	The purpose of this module is to provide Special Investigation staff with instructions for recording warrants in the Special Investigations pages in CalSAWS.	<ul style="list-style-type: none"> View, add and edit/update warrant records
023	Special Investigations (Fraud)	04	Investigation Notes	The purpose of this module is to provide Special Investigations Staff with instructions for viewing and adding investigation notes to the Special Investigations pages within CalSAWS.	<ul style="list-style-type: none"> View and add investigation notes
023	Special Investigations (Fraud)	05	Investigation Results	The purpose of this module is to provide Special Investigations employees with instructions for viewing, entering, updating and removing investigation results using the Special Investigations pages within CalSAWS.	<ul style="list-style-type: none"> View, add/enter and edit/update investigation results Remove investigation result records
023	Special Investigations (Fraud)	06	Prosecution Detail	The purpose of this module is to provide Special Investigations staff with instructions for entering prosecution results into the Special Investigations pages in CalSAWS.	<ul style="list-style-type: none"> Entering prosecution results
024	Special Investigations (Fraud) Supervisor	01	Manage Special Investigation Activities	The module is designed to provide Special Investigation Supervisors with instructions for managing Special Investigation activities using the Special Investigations pages in CalSAWS.	<ul style="list-style-type: none"> Accept a Special Investigation Referral Assign a Special Investigation to an Investigator Re-assign Special Investigations to an Investigator Review the Status History of an investigation Approve the completion of an investigation

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
026	Child Care APP	01	Managing Child Care Requests	The purpose of this module is to provide APP agency staff with instructions for managing child care requests within CalSAWS.	<ul style="list-style-type: none"> Describe child care request functionality Search for requests Add a request Edit/update and withdraw a request record
026	Child Care APP	02	Case Management	The purpose of this module is to provide APP agency staff with instructions for managing a Child Care program within CalSAWS.	<ul style="list-style-type: none"> Describe the case management process Add Stage 1 Child Care Authorizations Manage transition stages View or edit Child Care Authorizations
026	Child Care APP	03	Payment Tracking	The purpose of this module is to provide APP agency staff with instructions for reviewing and tracking child care payments in CalSAWS.	<ul style="list-style-type: none"> View existing payments Add missing payment information Edit existing payment information
027	Eligibility Foster Care	01	Intake Part A	The purpose of this module is to provide instructions for updating Foster Care (FC) Intake cases and issuing payments on FC cases in CalSAWS.	<ul style="list-style-type: none"> Accessing assigned FC cases and FC case information FC Intake functionality FC Income and Property Detail pages FC EDBC and Federal Ineligibility reasons
027	Eligibility Foster Care	02	Intake Part B	This is the second part of your Eligibility Foster Care Intake module. Eligibility Foster Care Intake Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> Part A (continued) Assessment
027	Eligibility Foster Care	02-A	Approved Part A	The purpose of this module is to provide instructions for updating Foster Care (FC) cases and issuing payments for Foster Care cases in CalSAWS.	<ul style="list-style-type: none"> Access assigned FC cases and review FC case information Add a Placement Authority Understand the FC Income and Property Detail page Run FC EDBC Maintain FC cases Process FC Re-evaluations Describe ARC Program related pages in CalSAWS
027	Eligibility Foster Care	02-B	Approved Part B	This is the second part of your Eligibility Foster Care Approved module. Eligibility Foster Care Approved Part B allows you to continue your training progress and contains your Assessment.	<ul style="list-style-type: none"> Part A (continued) Assessment
028	Eligibility KinGAP	02	Approved	The purpose of this module is to provide instructions for maintaining and issuing payments on Kin-GAP cases in CalSAWS.	<ul style="list-style-type: none"> Review Kin-GAP cases Re-determine a Kin-GAP case Run a Kin-GAP EDBC Maintain Kin-GAP cases
029	DCFS - Fiscal (for Foster Care)	02	Vouchers	The purpose of this module is to provide an overview of placement verification and instructions on how to conduct voucher activities on the Placement Verification Detail page in CalSAWS.	<ul style="list-style-type: none"> Process vouchers Reissue vouchers Place a hold on a case
031	Analytics	01	Qlik Platform Advanced Features	This WBT provides an overview on the following topics: Bookmarking, Chart/Table Interaction, Adding objects and chart selections and Duplicating Sheets.	<ul style="list-style-type: none"> Work with bookmarks Interact with objects
031	Analytics	02	Qlik Sense Data Storytelling	The purpose of this module is to provide an overview of Qlik Sense data storytelling feature to all users with access to CalSAWS dashboards.	<ul style="list-style-type: none"> Create a Qlik story presentation Take static snapshots of discovered data and create structured stories Embed live sheets of the discovered data in slides Export stories
033	Admin Functions	01	Managing Worker Assignment Designations	This WBT provides users with an overview of maintaining duty worker assignments.	<ul style="list-style-type: none"> Add and edit daily duty assignment designation

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
033	Admin Functions	02	Managing Worker(s) Schedules	The purpose of this training program is to provide an overview of entering and maintaining a worker(s) schedule and availability in CalSAWS.	<ul style="list-style-type: none"> Enter and maintain worker(s) schedule and availability
039	Child Welfare	01	Adoption Assistance Program (AAP)	This WBT provides end-users with an overview of processing Adoption Assistance Program (AAP) in CalSAWS.	<ul style="list-style-type: none"> Enter AAP data collection information Process online EDBC to issue the AAP benefits Process AAP program changes
039	Child Welfare	02	Approved Relative Caregiver (ARC)	This WBT provides end-users with an overview of processing Approved Relative Caregiver (ARC) in CalSAWS.	<ul style="list-style-type: none"> Enter ARC data collection information Process online EDBC to issue the ARC benefits
045	Imaging	01	County Maintained Workflow Queues	This WBT provides an overview of the County-maintained workflow queues, including the Exception, Reindex / Reindex All, No Case Assigned, Person Selection, Barcode Verification and the Document Removal queues. It covers the purpose of each queue, how documents are routed to each queue, and instructions to access and process documents pending in each queue. This WBT also includes details on how to transfer documents to another County's workflow queue.	<ul style="list-style-type: none"> Route and manage documents to the Exception queue Route and manage documents via the five queues used to reindex, assign cases or persons to, verify barcode information for, and remove documents Route and receive documents to and from other Counties
045	Imaging	02	Document Retrieval	This WBT provides information on how to retrieve both non-confidential and confidential documents that are stored in the Imaging Solution from select CalSAWS System pages and directly through the Perceptive Experience. The WBT includes details around drawers, view rights and the buttons used to retrieve documents. This WBT also includes instructions on how to use predefined and advanced searches to pull back documents in the Perceptive Experience that satisfy a specified search condition.	<ul style="list-style-type: none"> Search for and retrieve documents that are stored in the CalSAWS Imaging Solution
045	Imaging	03	Multi-Case Capture	This WBT provides information on how to use the Multi-Case Capture functionality to upload documents to multiple CalSAWS cases, and covers how to initiate the scan, organize documents per best practices, perform quality assurance of the scanned batch, and finalize the scan for system processing.	<ul style="list-style-type: none"> Scan images and documents using Multi-Case Capture
045	Imaging	04	Navigation	The purpose of this module is to provide users with an understanding of how to access Imaging functionality and navigate through the CalSAWS Imaging Solution.	<ul style="list-style-type: none"> Access Imaging functionality within the CalSAWS System Locate the functionalities within the Perceptive Experience
045	Imaging	05	Overview	This WBT provides users with an overview of the Imaging scan modes, Imaging workflow queues, drawers, annotations, and Imaging separator sheets and coversheets. It also covers the intersection between Task Management and Imaging at a high level.	<ul style="list-style-type: none"> Identify and understand uses for the various Imaging scan modes Understand how queues are used in the Imaging Solution Understand where and how documents are stored Add annotations and notes to documents View images related to specific tasks Generate Coversheets and Separator Sheets
045	Imaging	06	Return Mail Capture	This WBT provides information on how to use the Return Mail Capture functionality to upload undelivered mail that has been returned to the sending County into the Imaging Solution, and covers how to initiate the scan, organize documents per best practices, perform quality assurance of the scanned batch, and finalize the scan for system processing.	<ul style="list-style-type: none"> Scan documents as returned mail using Return Mail Capture for both single case and multi-case scanning

LMS Course #	LMS Course Category	Module #	Module Name	Description	Module Topics
045	Imaging	07	Single Case Capture	This WBT provides information on how to use the Single Case Capture functionality, including the Single Case Capture and the Ignore Barcode scan modes, to upload documents to a valid CalSAWS case. The WBT covers how to initiate the scan, perform quality assurance of the scanned batch, and finalize the scan for system processing for both scan modes.	<ul style="list-style-type: none">• Scan documents using Single Case Scan mode• Scan documents using Ignore Barcode Scan mode
045	Imaging	08	Specialty Scan Modes	This WBT provides information on how to use the Specialty Scan Modes functionality, including the Special Investigation Unit (SIU), Hearings, Resource Data Bank (RDB), and the Other County Departments scan modes, to upload documents pertaining to SIU, Hearings, RDB and Other County Departments, respectively. This WBT covers how to initiate the scan, organize documents per best practices, perform quality assurance of the scanned batch, and finalize the scan for system processing for each Specialty Scan mode.	<ul style="list-style-type: none">• Scan documents using the Special Investigation Unit (SIU), Hearings & Resource Data Bank (RDB) Scan modes• Scan documents using the Other County Department Scan modes
045	Imaging	09	Virtual Printer Capture and Import	This WBT provides information on how to use the Virtual Printer Capture and File Upload functionalities and covers how to initiate the scan, organize documents per best practices for File Upload only, perform quality assurance of the scanned batch, and finalize the scan for system processing. The File Upload functionality allows users to upload non-barcoded documents stored in their local device, while the Virtual Printer Capture functionality allows users to printer documents from an application or window directly into the CalSAWS System.	<ul style="list-style-type: none">• Print documents from an application into the CalSAWS Imaging Solution using Virtual Printer capture• Import local documents using File Upload mode
047	Supervisor Authorization	01	Supervisor Authorization	This WBT provides an overview of the Supervisor Authorization functionality for 1st level and 2nd level approvers.	<ul style="list-style-type: none">• Understand how authorization requirements and case sampling percentages are set• Identify, approve, and/or reject eligibility authorization requests• Identify, approve, and/or reject fiscal authorization requests• Access and understand associated reports