Offices – Manage

Purpose

The purpose of this job aid is to provide information for maintaining office information. The following tables provide step-by-step instructions on searching, adding, and editing office information.

Before Starting

Before adding or editing office information, gather the following information:

- Office Name
- Begin Date
- Office Type
- Does this Office accept Self Service Portal Applications
- Mailing and Physical Addresses
- Main Phone Number

Viewing Offices

Users can view all the offices entered into the System. The System allows Users with the appropriate security rights to add or edit the offices in their county.

Searching for an Office

Note: Conduct a search for an office before adding an office to make sure it does not already exist.

Searching for an office without entering any search criteria returns a list of all the offices already available in the System. **Searching for an Office:**

Step	Action
1.	Place the cursor over **Admin Tools** on the **Global** navigation bar.
2.	Select **Office Admin** from the **Local** navigator
3.	Click the **Office** link on the **Task** navigation bar.
4.	On the **Office Search** page: a) Click the **Search** button without entering any search criteria. OR b) Enter **<Office ID>** in the **Office ID** field.

Step	Action
	AND/OR c) Enter **<Office Name>** in the **Office Name** field. AND/OR d) Select **<Office Type>** from the **Office Type** drop list. AND/OR e) Select **<County>** from the **County** drop list. AND/OR Enter **<End Date>** in the **End Date** field. f) Click the **Search** button.

Note: On the Office Search page, the County drop list defaults to the county to which the logged in User's office belongs.

When to Add an Office

Offices are always added based on requests you receive. Refer to your County's policy when addressing requests to add an office.

Adding an Office:

Step	Action
1.	Place the cursor over **Admin Tools** on the **Global** navigation bar.
2.	Select **Office Admin** from the **Local** navigator
3.	Click the **Office** link on the **Task** navigation bar.
4.	On the **Office Search** page: a) Click the **Search** button without entering any search criteria. b) Click the **Add Office** button.
5.	On the **Office Detail** page: a) Enter **<Office Name>** in the **Office Name** field. b) Enter **<Date>** in the **Begin Date** field. c) Select **<Type>** from the **Office Type** drop list. d) Select option from the **Accepts E-Applications:** drop list e) Select **<Division>** from the **Division** drop list, if appropriate. f) Select **<Office Region>** from the **Region** drop list, if appropriate. g) Select **<Group>** from the **Region Groups** drop list, if appropriate. h) Select **<District>** from the **<District>** drop list, if appropriate. Enter **<Hours the Office is Open to the Public>** in the **Public Hours of Operation** field, if appropriate.
6.	In the **Public Hours of Operation** page section: a) Select a **<Time>** from the **Start Time** drop list for the appropriate **Day** of the week b) Select a **<Time>** from the **End Time** drop list for the appropriate **Day** of the week c) Update the **<Time>** from the **Correspondence Office Hours**

Step	Action
	Start Time drop list, if appropriate. d) Update the **<Time>** from the **Correspondence Office Hours End Time** drop list, if appropriate. **Note:** The County will default to the County of the logged in User. e) Enter a **<Description>** in the **Description** field, if appropriate.
7.	In the **Programs Offered** page section: a) Select a **<Program>** from the **Program** drop list. b) Enter **<Date>** from the **Begin Date** field, if appropriate. c) Click the **Add** button if you have to enter more programs and repeat steps 7a to 7c.
8.	In the **Address Information** page section: a) Click the **Add Address** button.
9.	On the **Address Detail** page: a) Select **<Type(s)>** from the **Address Type(s)** multi-select box. **Note:** When adding an office, you must always add a physical and mailing address for each office b) Enter **<Date>** in the **Address Effective Date** field. c) Enter **<Address>** in the **Address Line 1** field. d) Enter **<Address>** in the **Address Line 2,** field, if appropriate. e) Enter **<City>** in the **City** field. f) Confirm **CA** is selected from the **State** drop list. g) Enter **<Zip Code>** in the **Zip Code** field. h) Click the **Submit** button.
10.	On the **Select Address** page: a) Click the radio button next to the correct Address. b) Click the **Select** button.
11.	On the **Office Detail** page in the **Phone Number** page section: a) Select **<Type>** from the **Type** drop list. b) Enter **<Phone Number>** in the **Number** field. c) Enter **<Extension Number>** in the **Extension** field, if appropriate. d) Click the **Add** button if you have to enter more phone numbers and repeat steps 11a – 11c.

Adding Office Relationships

The Office Relationship page section allows you to associate offices that have related duties/functions and programs.

You are able to create the following relationships:

1. CalWORKs to WTW
2. WTW to WTW Region's Cashier Office
3. Office to District Office
4. Office to Centralized Office

Add Office Relationships:

Step	Action
11.	In the **Office Relationship** page section: a) Click the **Add** button.
12.	On the **Office Relationship Detail** page: a) Select **<Type>** from the **Type** drop list. b) Click the **Select** button next to the **Office 2** field.
13.	On the **Select Office** page: a) Enter the appropriate search criteria. b) Click the **Search** button.
14.	On the **Select Office** page: a) Confirm the selected office. b) Click the **Select** button.
15.	On the **Office Relationship Detail** page: a) Click the **Save and Return** button.
16.	On the **Office Detail** page: a) If another relationship needs to be added, repeat steps 11-15. b) Click the **Save** button. c) Click the **Close** button.

Reasons to Edit Office Information

There are many reasons why office information may need to be updated, including:

- Operating Hours Change
- Move to a New Location
- Different Programs Processed at the Office
- Change Phone Number

Editing an Office:

Step	Action
1.	Place the cursor over **Admin Tools** on the **Global** navigation bar.
2.	Select **Office Admin** from the **Local** navigator.
3.	Click the **Office** link on the **Task** navigation bar.
4.	On the **Office Search** page: a) Enter search criteria for the office you need to update. b) Click the **Search** button. c) Click the **Edit** button next to the office you want to update.
5.	On the **Office Detail** page: a) Make the appropriate changes.

Step	Action
	b) Click the **Save** button. c) Click the **Close** button.