

Distribution Date	January 13, 2025
To	PPOC.All; Committee.Training
CC	Consortium.RegionalManagers.All; Consortium.SectionDirectors;
CIT Name	CalSAWS Quick Guides – Reports Navigation, Homeless Assistance (3), Auto Case Assignment, Appointments and Scheduling, Application Registration

PPOCs, please forward to the appropriate impact staff in your county:

- | | |
|--|---|
| <input checked="" type="checkbox"/> General | <input checked="" type="checkbox"/> Reports |
| <input type="checkbox"/> Policy | <input type="checkbox"/> Fiscal |
| <input checked="" type="checkbox"/> CW | <input type="checkbox"/> Caseload Movement |
| <input type="checkbox"/> CF | <input type="checkbox"/> Management |
| <input type="checkbox"/> MC | <input type="checkbox"/> Batch and Interfaces |
| <input type="checkbox"/> CMSP | <input type="checkbox"/> Fiscal |
| <input type="checkbox"/> FC/KG/AAP | <input type="checkbox"/> GA/GR |
| <input type="checkbox"/> Child Care | <input type="checkbox"/> Help Desk |
| <input type="checkbox"/> WtW | <input type="checkbox"/> Imaging |
| <input type="checkbox"/> Other Program(s)_____ | <input type="checkbox"/> Security |
| <input type="checkbox"/> BenefitsCal | <input type="checkbox"/> Task Management |
| <input type="checkbox"/> Customer Correspondence | <input type="checkbox"/> Technical |
| <input type="checkbox"/> OCAT | <input checked="" type="checkbox"/> Training |
| <input type="checkbox"/> Other_____ | |

Description	Purpose
	The purpose of this CIT is to inform Counties of the availability of one new Quick Guide and that updates have been made to six Quick Guides. These Quick Guides are now available in the Learning Management System (LMS).
	Background
	The CalSAWS Quick Guides were created to provide users additional training resources to assist them in performing functions in CalSAWS. They include step-by-step instructions as well as screenshots to enhance the learning experience.
	Additional Information
	The Reports Navigation Quick Guide provides the user with functional instructions on reviewing On Request (Curated and Dynamic View), Scheduled (generated via batch runs), and Business Intelligence Reports (supports

dashboards, graphical visualizations of data and ad-hoc reporting capabilities) within the System.

The **Homeless Assistance** Quick Guides (**Temporary**, **Permanent**, and **Vendor Voucher Payment**) have been updated. Homeless Assistance - Temporary - Data Collection and Homeless Assistance - Temporary - EDBC have been combined into a single Homeless Assistance - Temporary Quick Guide, C-IV references have been removed, and the steps have been validated. Homeless Assistance - Permanent - Data Collection and Homeless Assistance - Permanent - EDBC have been combined into a single Homeless Assistance - Permanent Quick Guide, C-IV references have been removed, and the steps have been validated. For Homeless Assistance - Vendor Voucher Payment, C-IV references have been removed, and the steps have been validated.

The **Auto Case Assignment** Quick Guide provides users information on configuring position and staff information to allow for automatic case assignment. It highlights important fields that must be updated in the Position Detail and Staff Detail pages. It also provides an overview of the System flow for auto case assignment.

The **Appointments and Scheduling** Quick Guide contains information on configuring a position in the System to allow for appointment scheduling functionality, setting up an office schedule, maintaining worker schedules, scheduling appointments and viewing scheduled appointments. It highlights important fields that must be completed in System pages for auto scheduling functionality. In addition, it provides information on the various ways users can access their scheduled appointments.

The **Application Registration** Quick Guide provides information on how to register applications through the System and how to link those applications to a case. It covers 3 scenarios for registering applications:

- Persons known to the System with an existing case
- Persons known to the System but with a new case created
- Persons not known to the System

In addition, it explains how to view a registered application after it has been linked to a case.


County Actions

Please distribute this CIT and the CalSAWS Quick Guides to any county staff who perform these functions. The Quick Guides can be found in the LMS. LMS access is available and encouraged for all users. Users needing access to the LMS should follow their county process to submit a Single or Bulk User LMS Access Request in CalSAWS ServiceNow.

If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.

Primary Project Contact

Ashley Arnold
Consortium Communications Manager
(916) 862-1769

	ArnoldA@CalSAWS.org
Backup Project Contact	Jayna Longstreet Consortium Trainer LongstreetJ@CalSAWS.org
Attachments	CIT 0006-25 CalSAWS Quick Guide - Application Registration.pdf CIT 0006-25 CalSAWS Quick Guide - Appointments and Scheduling.pdf CIT 0006-25 CalSAWS Quick Guide - Auto Case Assignment.pdf CIT 0006-25 CalSAWS Quick Guide - Homeless Assistance - Permanent.pdf CIT 0006-25 CalSAWS Quick Guide - Homeless Assistance - Temporary.pdf CIT 0006-25 CalSAWS Quick Guide - Homeless Assistance - Vendor Voucher Payment.pdf CIT 0006-25 Reports Navigation.pdf
Web Portal Link	 OR You may also retrieve the CIT document and attachments by following these steps: <ol style="list-style-type: none">1. Click on the CRFIs & CITs link at the top of the page.2. Click on the "CalSAWS Information Transmittal (CIT)" folder.3. Click on the "2025" folder.4. Click on the appropriate CIT # folder.