Reception Log

This CalSAWS Quick Guide (QG) provides the end-user with functional instructions on Reception Log functionality available in the System.

The QG can be used as a training medium for the following situations:

- For displaying CalSAWS functional processes and changes
- To summarize and repeat key points from a Web-Based Training (WBT) or Job Aid

The QG may include functional instructions, as well as screenshots from the System. It may highlight new functional processes, pages, page sections, fields, drop lists, etc.

This document is intended for County use. It is not intended for public distribution.

CalSAWS Process

In CalSAWS, the Reception Log is used to track customer office visits. Through the Reception Log, you can send e-mail notifications to a selected user to notify them that the customer is in the office. You can also send electronic messages through the Message Center to notify users of a customer check in.

This guide provides information on the following topics:

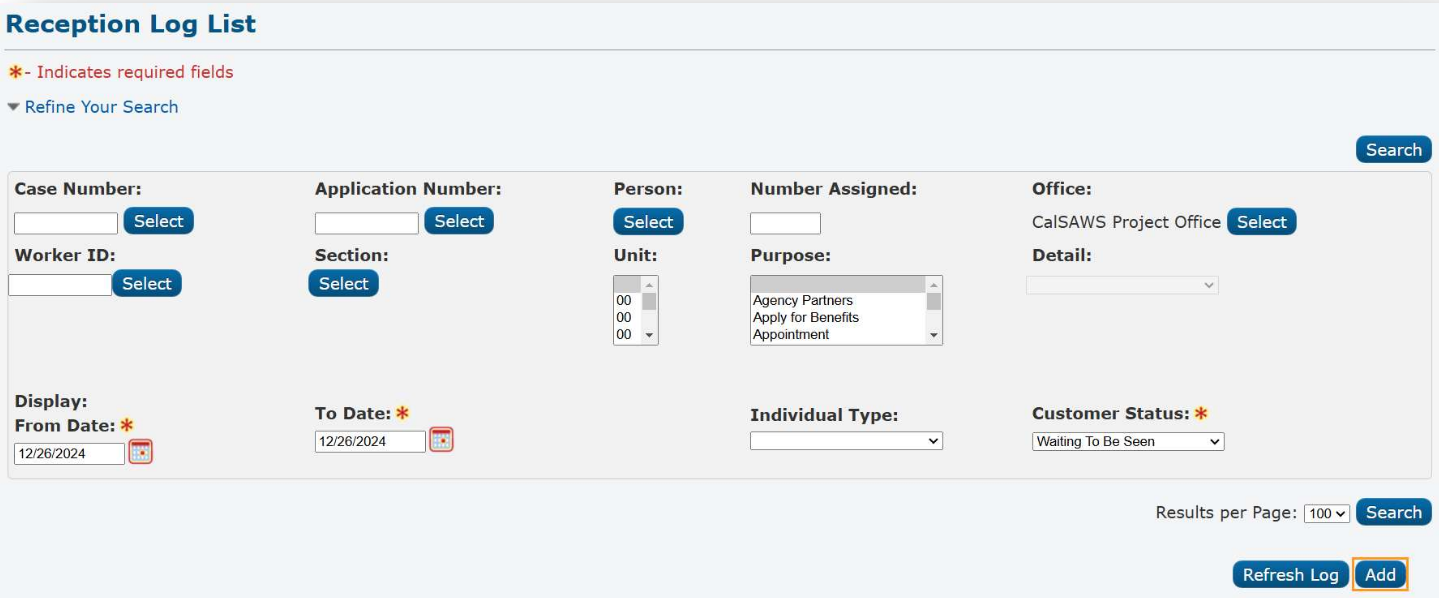
- Creating a reception log entry
- Viewing reception log entries
- Message Center notifications

Creating a Reception Log Entry

The reception log is accessed from the CalSAWS Home Page by clicking the Reception Log hyperlink in the Quick Links page section. Users with the appropriate security rights can view or create reception log entries.

After clicking the hyperlink, the Reception Log List pop-up appears. Here you can view and create reception log entries.

To create a new reception log entry, click the Add button on the Reception Log List pop-up.



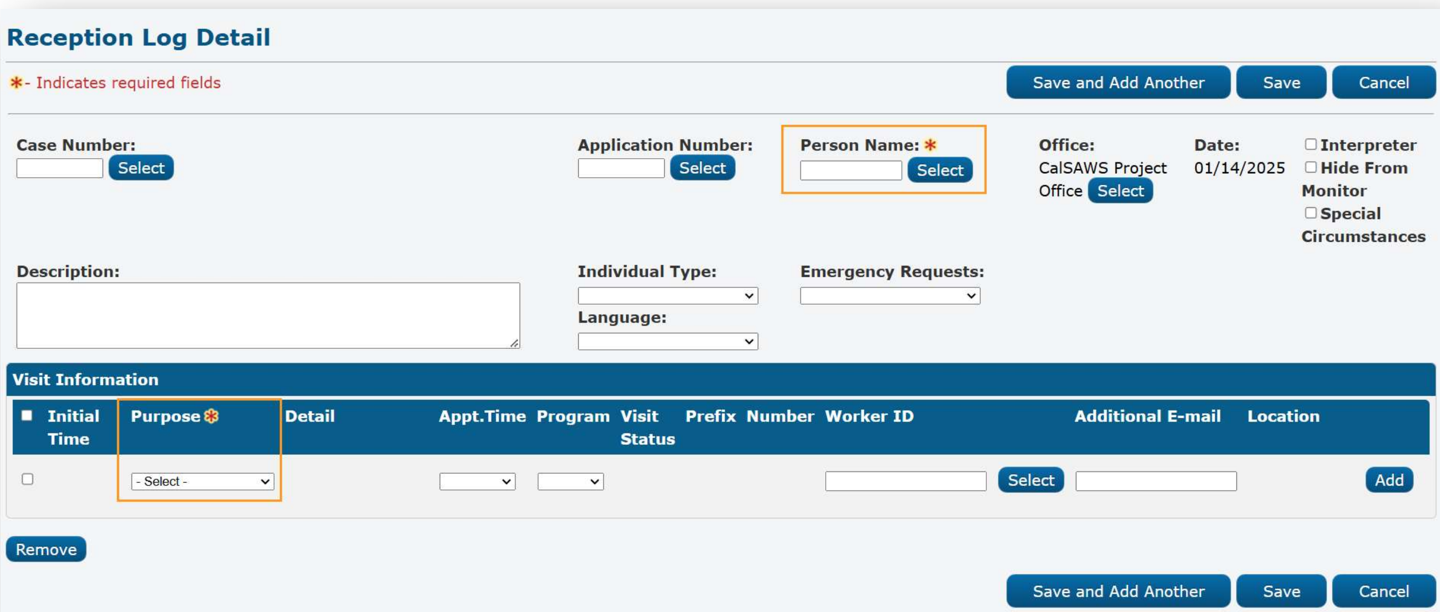
When clicking the Add button from the Reception Log List page, the Reception Log Detail page displays and the following page elements are available:

- Case Number field – Allows you to enter the case number or search for a case by clicking the Search button which navigates to the Select Person page where you can conduct a search for a case number
- Application Number field – Allows you to enter an application number, if applicable
- Person Name field – Allows you to type in the name of the person who is in the office, or, if a case number was entered in Case Number field, the field becomes a drop list where you can select a case member
- Office – Select button allows you to search for and select a different office for the entry
- Interpreter checkbox – Indicates the customer requires an interpreter
- Hide From Monitor checkbox – Prevents the entry from being displayed in the lobby monitors
- Special Circumstances checkbox – Indicates that the customer has a special circumstance, such as accommodations or additional assistance; displays the special circumstances icon
  Note: Additional information on special circumstances can be found on Job Aid Special Circumstances – Adding Customer Indicators.
- Description field – Allows you to enter additional information regarding the visit
- Individual Type drop list – Indicates how the individual is related to the visit
- Emergency Requests drop list – Indicates if the customer needs Immediate Need, Expedited Services or has a Homeless Situation; displays the emergency icon
- Language drop list – Indicates the customer's language
- Purpose drop list – Captures the reason for the office visit
- Appt. Time drop list – Captures the appointment time, if applicable
- Program drop list – Indicates the program the visit is concerning

Note: Only one program can be selected from the drop list. Depending on your County process, the Add button can be used to add a second line to the entry if additional programs or visit purposes need to be selected.

- Worker ID field – Allows you to enter the worker ID or click the Select button to navigate to the Select Worker page where you can conduct a search for the worker
- Additional E-mail field – Allows you to enter an additional email address to send a notification for the office visit
- Add button – Creates a second line to add a second purpose for the office visit
- Remove button – A visit purpose can be removed by clicking the checkbox and then clicking the Remove button
- Save and Add Another button – Saves the current entry and allows you to create an additional entry
- Save button – Saves the current entry and displays the Reception Log Detail page in View mode
- Cancel button – Cancels the current entry and returns to the Reception Log List page

The required fields to create a reception log entry are the Person Name field and the Purpose drop list. Additional information can be entered following your County's policies and procedures.



Once the entry is saved, a status and number are assigned, and the following buttons display:

- Print Number Full Page – Generates a receipt with the number assigned to the customer
- Generate Referral – Generates the CSF 130 County Referral form
- Generate CW 31 – Generates the CW 31 Receipt for Documents form
- Edit – Allows you to edit the entry
- Close – Navigates you back to the Reception Log List page

After clicking the Close button, you navigate back to the Reception Log List page where all the reception log entries for the office display on the Search Results Summary page section. Entries with an emergency request or special circumstance display the appropriate icons.
The entries are listed in the order they are created, starting from oldest to newest. However, entries with an emergency request or special circumstance are prioritized and moved to the top of the list. Entries can also be sorted by any of the columns by clicking the corresponding sorting arrow.

If a worker is selected when the reception log entry is created the Worker ID column displays the worker ID as well as the following icons:

- Send Message – Sends a Message Center message to the selected worker
- Send Email – Sends an email to the selected worker
- Send Email and Message – Sends both an email and a message to the selected worker

Clicking the Edit button navigates you back to the Reception Log Detail page. Here you can make any necessary updates to the entry, add additional Visit Information and disposition the reception log entry by clicking the following buttons:

- Snooze
- Acknowledge Notification
- No Response
- Meeting Started
- Complete

Note: Snooze functionality is configured by Counties, follow your County's policy and procedures when using this button.

When a customer has an appointment scheduled and they are checked-in through the Reception Log, their appointment status automatically gets updated to Showed in the Customer Schedule as long as the date, time, case number and person match the appointment details, and the appointment has a Status of Scheduled or Rescheduled.

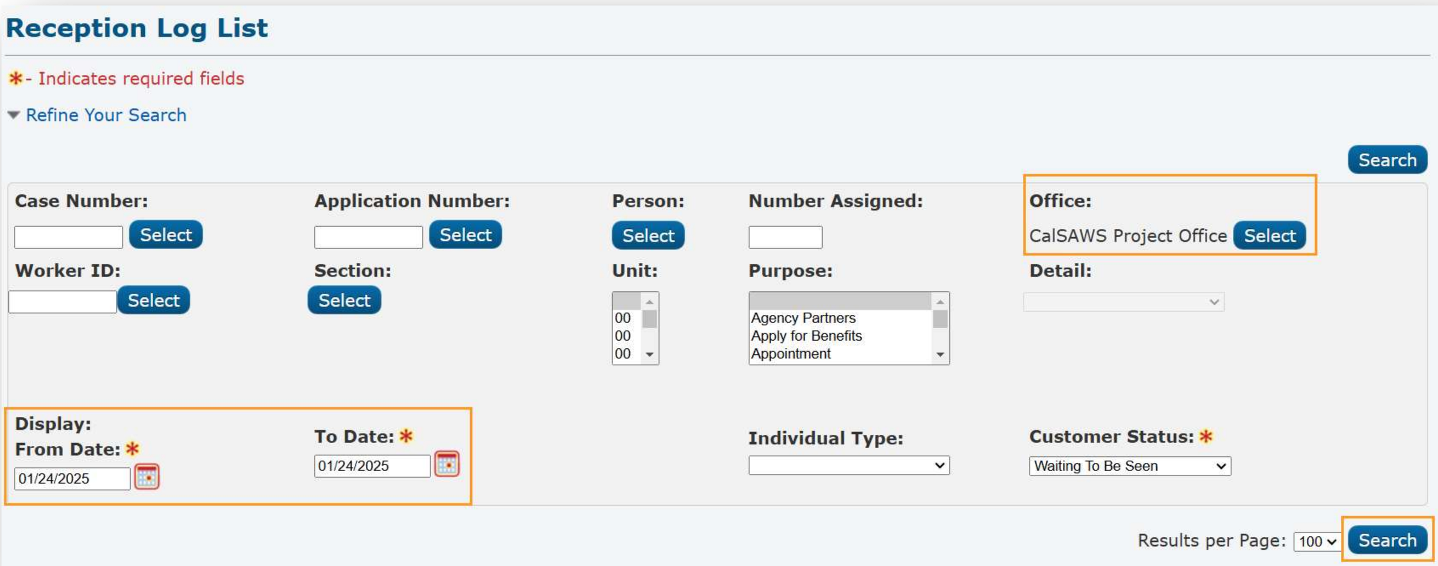
Reception log entries that have a Visit Status other than Complete or No Response by the end of the day are updated by a nightly batch to change the Visit Status to either Complete or No Response as follows:

- Updated to Complete if the latest Visit Status is Meeting Started

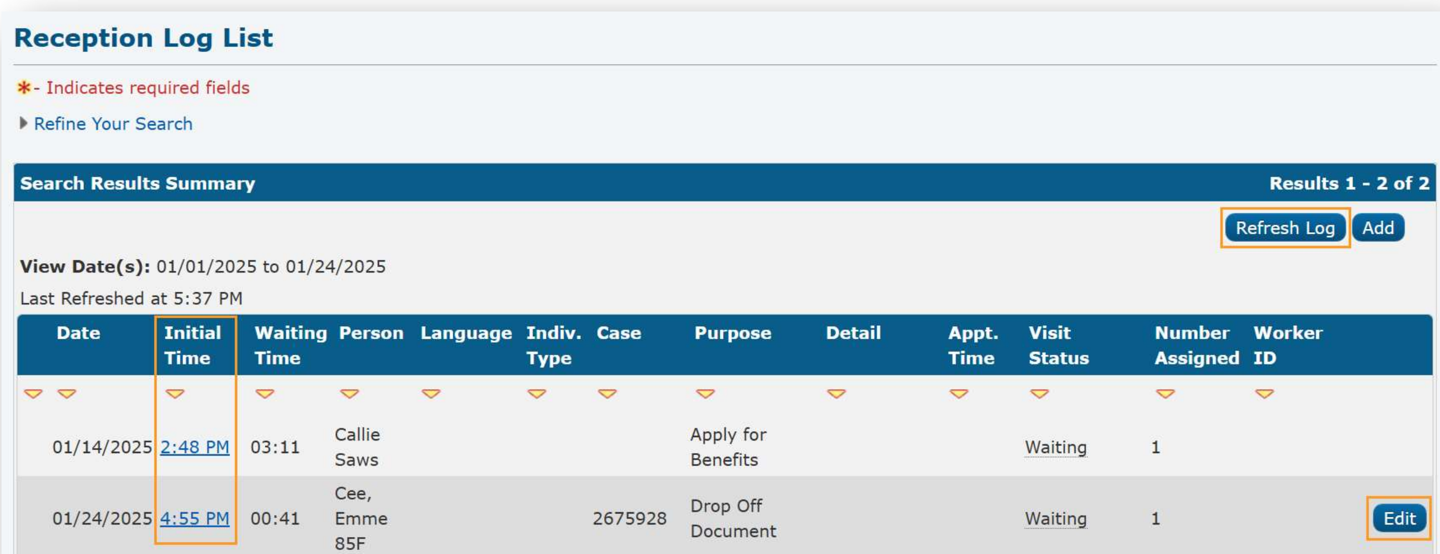
- Updated to No Response if the latest Visit Status is anything other than Meeting Started

Viewing Reception Log Entries

To view entries that have been created, click the Reception Log hyperlink on the Home Page. On the Reception Log List pop-up the display defaults to the current day, the office of the logged in user and the Customer Status of Waiting to Be Seen. However, the Refine Your Search page section allows you to search for reception log entries using additional search criteria to narrow the search results. Once all criteria is updated, click the Search button to refresh the search results.



The reception log entries display in the Search Results Summary page section. To view a reception log entry, click the Initial Time hyperlink to navigate to the Reception Log Detail page for the entry. Reception log entries from prior days can be viewed but cannot be edited or dispositioned. The Refresh Log button refreshes the search results listed.


Reception Log List

*- Indicates required fields

Refine Your Search

Search Results Summary — Results 1 - 2 of 2

Refresh Log | Add

View Date(s): 01/01/2025 to 01/24/2025

Last Refreshed at 5:37 PM

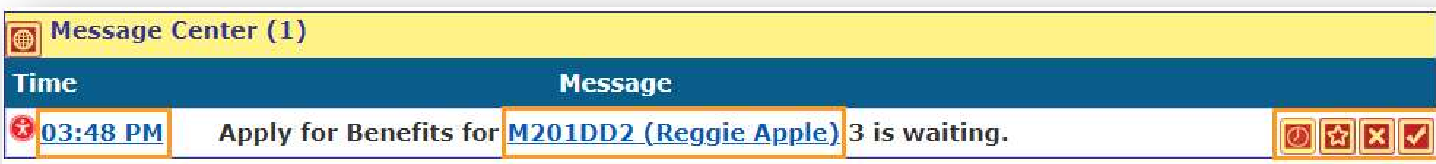
Date	Initial Time	Waiting Time	Person	Language	Indiv. Type	Case	Purpose	Detail	Appt. Time	Visit Status	Number Assigned	Worker ID	
01/14/2025	2:48 PM	03:11	Callie Saws				Apply for Benefits			Waiting	1		
01/24/2025	4:55 PM	00:41	Cee, Emme 85F			2675928	Drop Off Document			Waiting	1		Edit

Message Center

The Message Center displays notifications for customer office visits created through the Reception Log. Once you are logged in to the System, and if you have messages, the Message Center displays as a yellow bar below the Global navigation bar. The globe icon expands and collapses the Message Center so you can view messages. The Message Center collapses automatically when navigating to new pages and refreshes when navigating within the System pages and when the user logs into the System.

The messages inform the user that a customer is waiting in the lobby and include the following details:

- Time of the entry's current status
- Reception Log visit type
- Case number
- Customer's name



The Message Center hyperlinks access the following:

- Time – Displays the Reception Log Detail page that sent the message
- Message – Navigates you to the Case Summary page of the associated case

You can update the Reception Log status by clicking the following buttons:

- Snooze
- Acknowledge
- Meeting started – Displays only after a message is acknowledged
- No Response
- Complete

Messages are specific to the case when in the context of a case. They are sorted by the timestamp from oldest to newest and cannot be manually sorted. Messages are cleared daily and only display on the day they are sent.