

# CalSAWS

California Statewide Automated Welfare System



## TLM 39-Lobby Device Modernization Employee Portal Guide

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DOCUMENT REVISION HISTORY

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# CA-213363: Lobby Device Platform Consolidation/Modernization

## 1 EMPLOYEE PORTAL GUIDE

### 1.1 Self-Service Kiosk Home/Landing Screen

Employee Only Portal displays after the users clicks on the "County of XXX" 3 times sequentially within 5 seconds from the Self-Service Kiosk home/landing screen.



## Bienvenido al Self-Service Quiosco

Continue in English

Continuar en Español

English | Español

### 1.1.1 Employee Portal Home Screen

The Employee Only Portal landing screen displays 3 buttons:

1. **Cancel** - Clicking the "Cancel" button re-directs the user back to the Self-Service Kiosk home/landing screen.
2. **Continue** - Clicking the "Continue" button re-directs the user to the ForgeRock log-in screen (these are the same screens used to log-in to other applications such as CalSAWS).
3. **Device Registration** - Clicking the "Device Registration" button re-directs the user to the ForgeRock device registration log-in screen (these are ForgeRock screen used to associate Kiosk devices with CalSAWS-provided kiosk credentials).

# Employee Only Portal

This section is for authorized employees only.

If you have reached this page in error, please select  
Cancel to return to the previous screen.

To proceed, select Continue.

To register the device, select Device Registration.

Cancel

Continue

Device  
Registration

English | Español

# Portal exclusivo para empleados

Esta sección es sólo para empleados autorizados.

Si llegó a esta página por error, seleccione  
Cancelar para volver a la pantalla anterior.

Para proceder, seleccione Continuar.

Para registrar el dispositivo, seleccione Registro del Dispositivo.

Cancelar

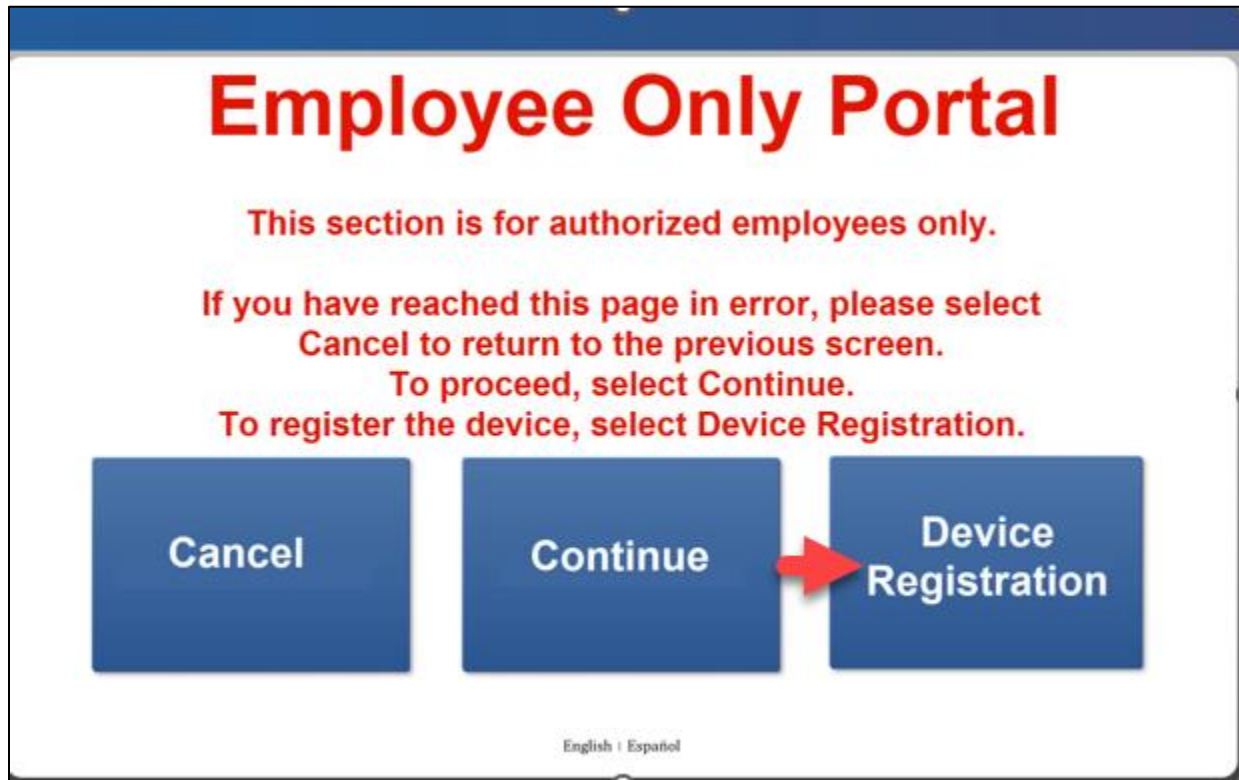
Continuar

Registro de  
Dispositivo

English | Español

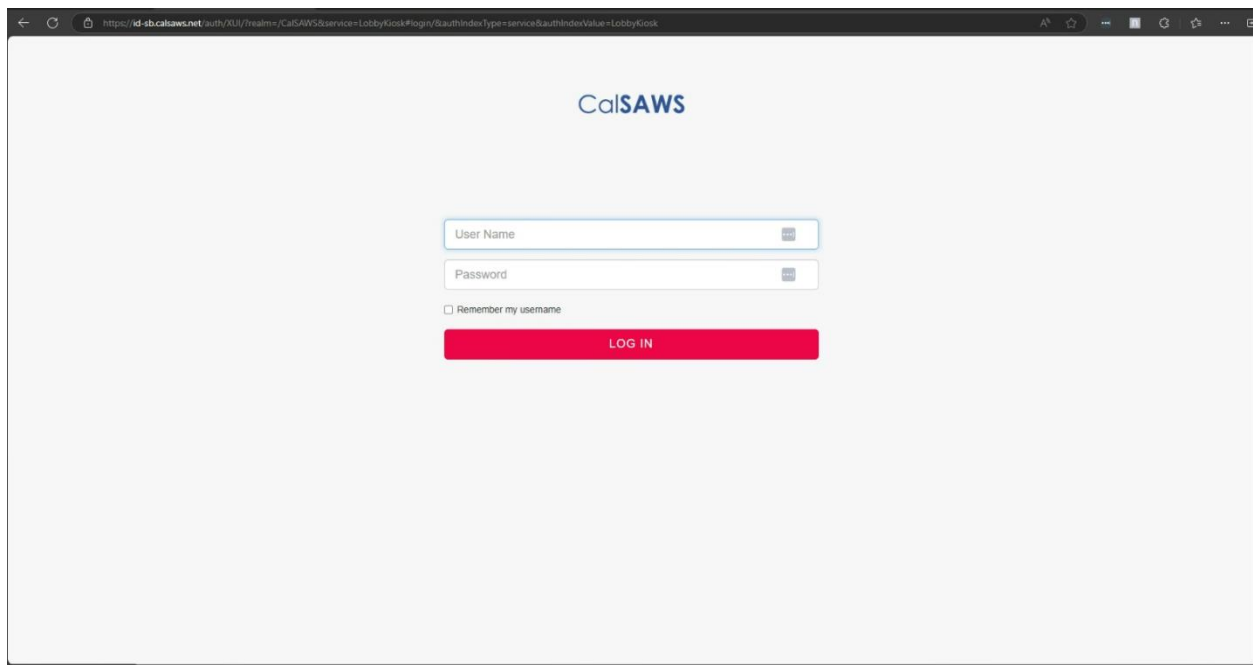
### 1.1.2 Employee Portal- Device Registration

The Employee Portal -Device Registration is used to register and deregister a kiosk device. Start the registration process by selecting **Device Registration**.

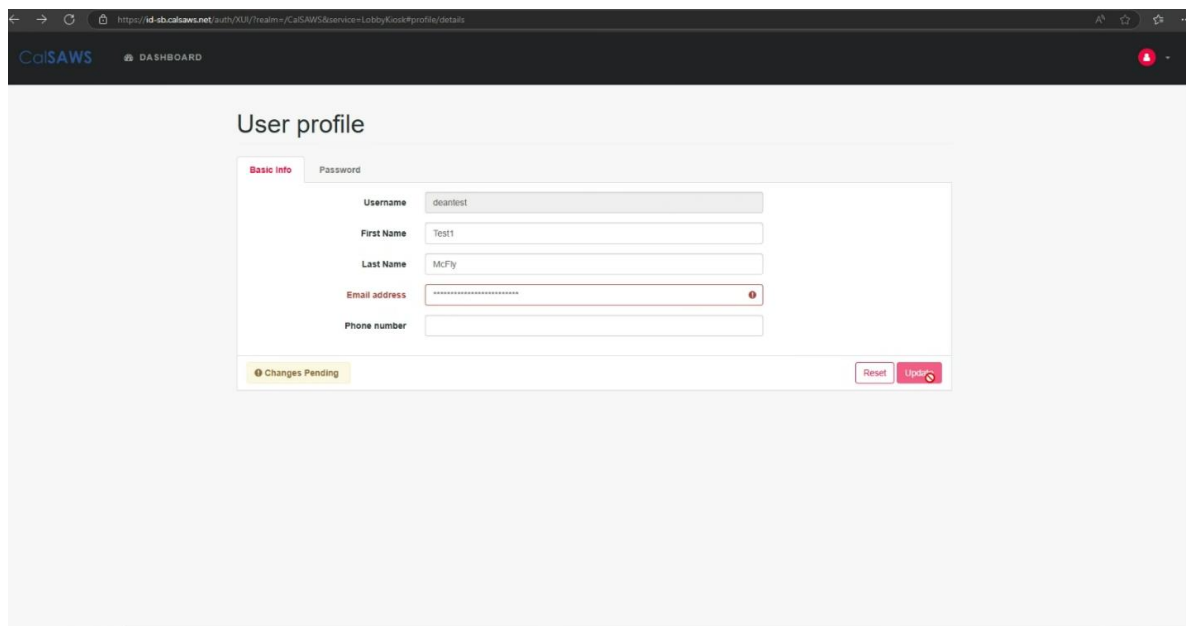


Enter the CalSAWS-provided kiosk credentials and select **Log In**.

*Note: Each credential can only be registered to 1 device at a time.*

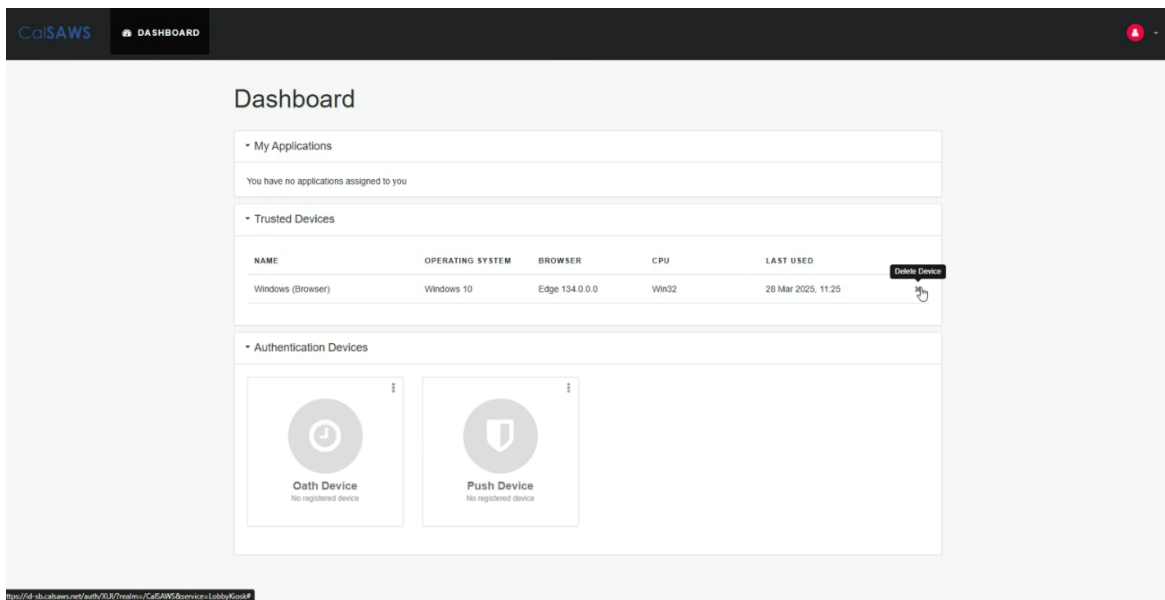


Users will be re-directed to this page initially after Log In. This page will display the Forge Rock user details.

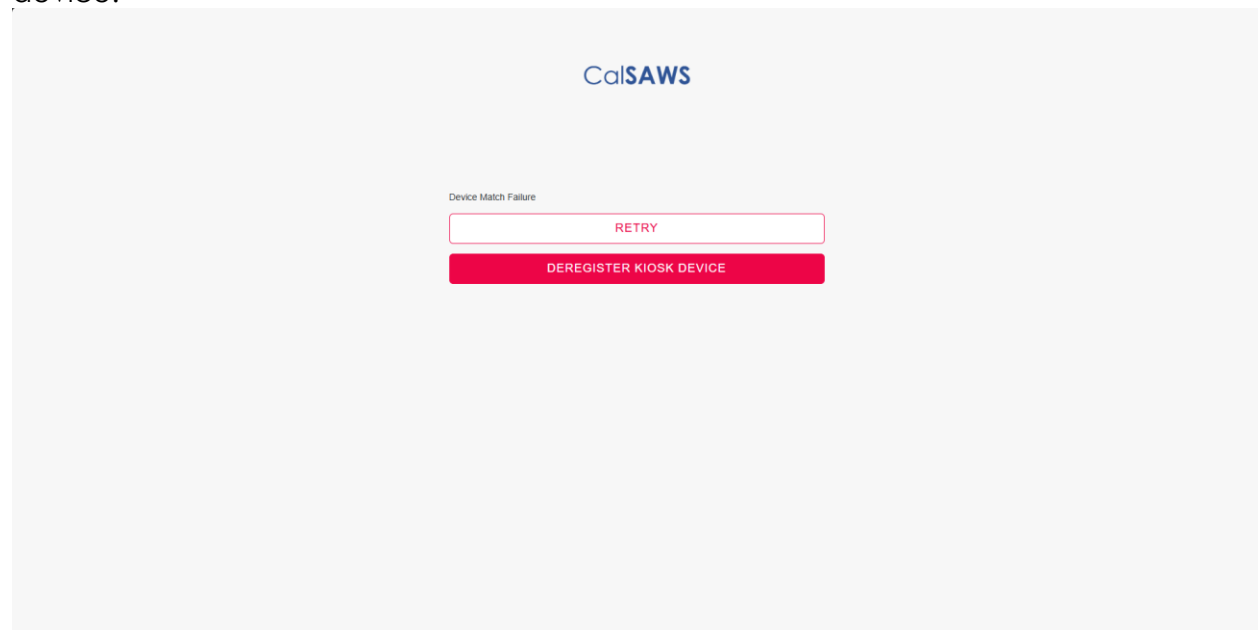


User will be re-directed to this page after clicking on the dashboard header at the top left-hand corner. Users will have the option to disable the device from the account by clicking on 'x (Disable Deice)' icon.



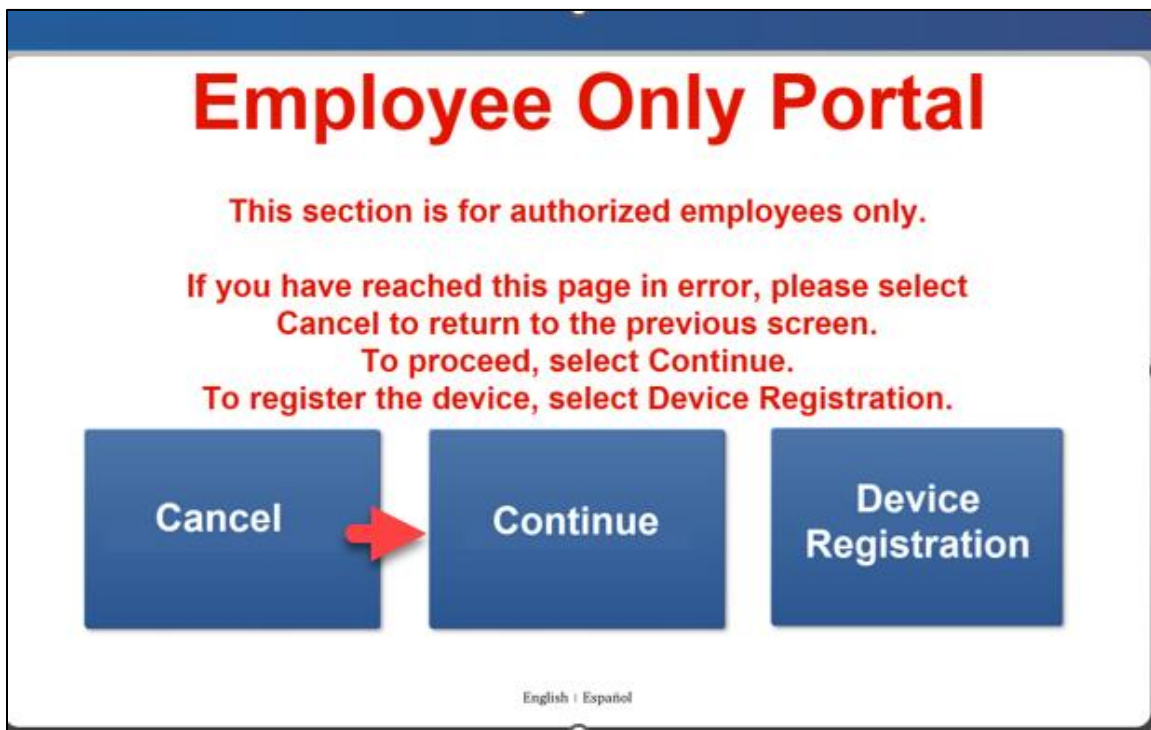


If the Kiosk credentials entered are already associated to a device, the following screen displays. Select **Deregister Kiosk Device** to remove the association of credentials with this device. After deregistration, the credentials can be used to register a different device.



### 1.1.3 Employee Log-In/ForgeRock Mockup

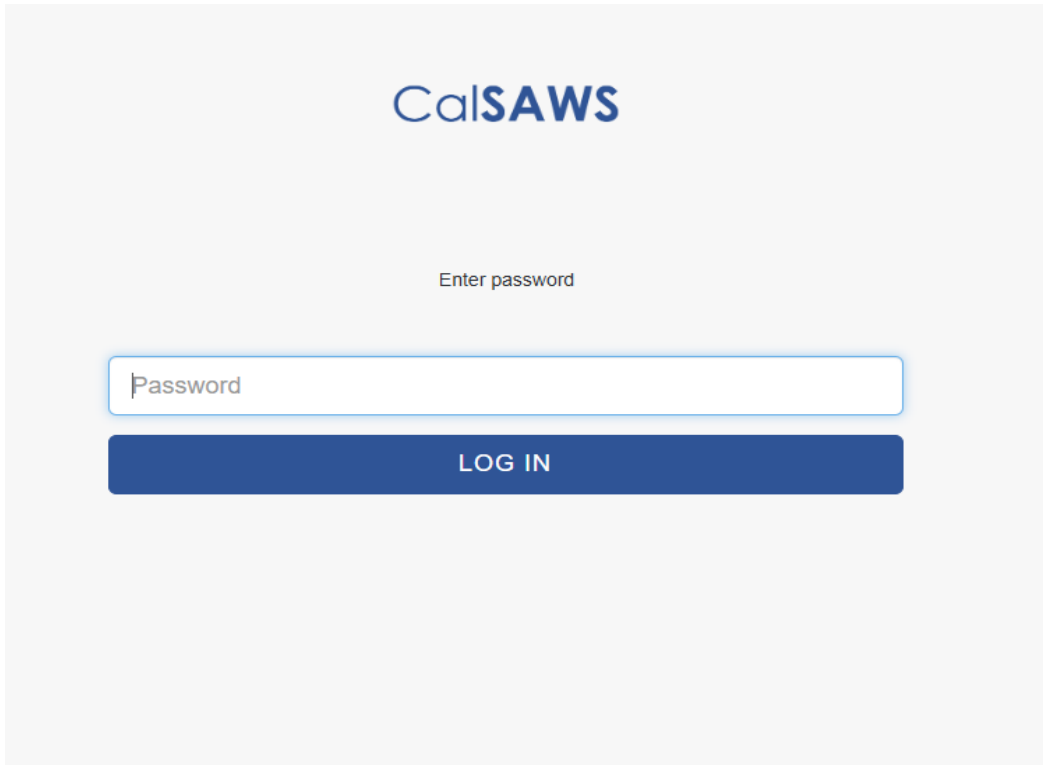
Users will be re-directed to the CalSAWS log-in screen when they select **Continue**.



Enter the CalSAWS username and click on **LOG IN**.

The image shows the CalSAWS login form. At the top, the 'CalSAWS' logo is centered. Below the logo is a white input field with the placeholder text 'User Name'. Below the input field is a blue rectangular button with the text 'LOG IN' in white capital letters.

Enter the CalSAWS Password and click on **LOG IN**.

The image shows the CalSAWS login interface. At the top center is the CalSAWS logo. Below it, the text "Enter password" is displayed. Underneath is a white rectangular input field with a blue border and the placeholder text "Password". Below the input field is a solid blue rectangular button with the text "LOG IN" in white, uppercase letters.

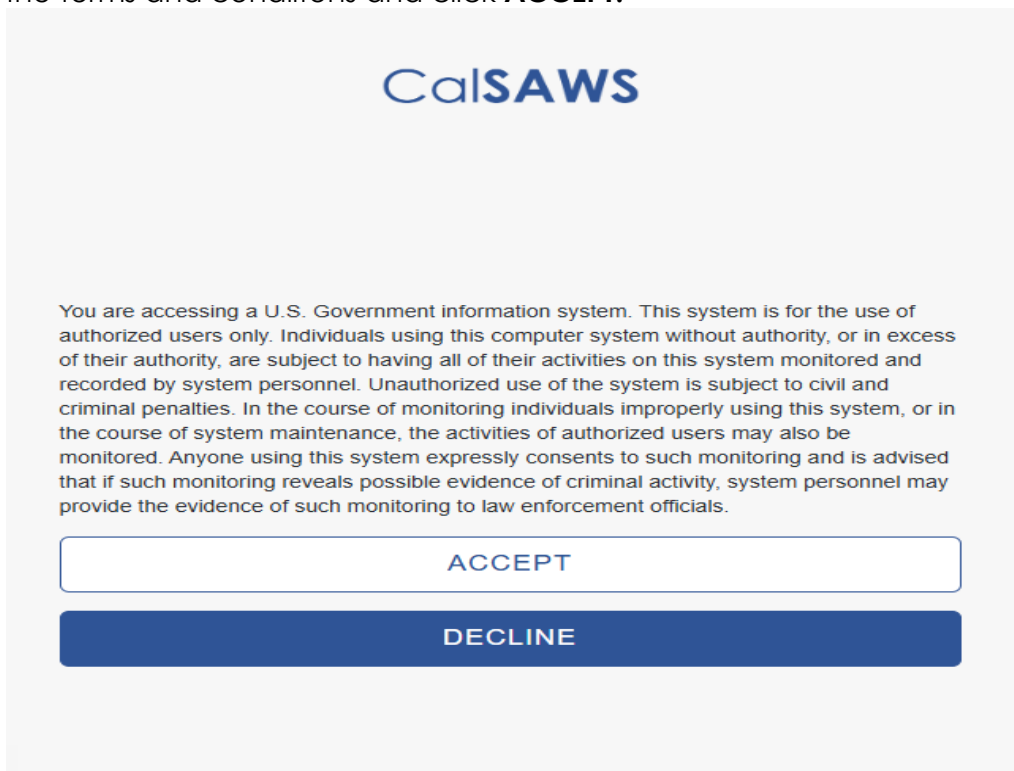
CalSAWS

Enter password

Password

LOG IN

Review the terms and conditions and click **ACCEPT**.

The image shows the CalSAWS terms and conditions screen. At the top center is the CalSAWS logo. Below it is a paragraph of text regarding system access and monitoring. At the bottom are two buttons: a white button with a blue border labeled "ACCEPT" and a solid blue button labeled "DECLINE" in white, uppercase letters.

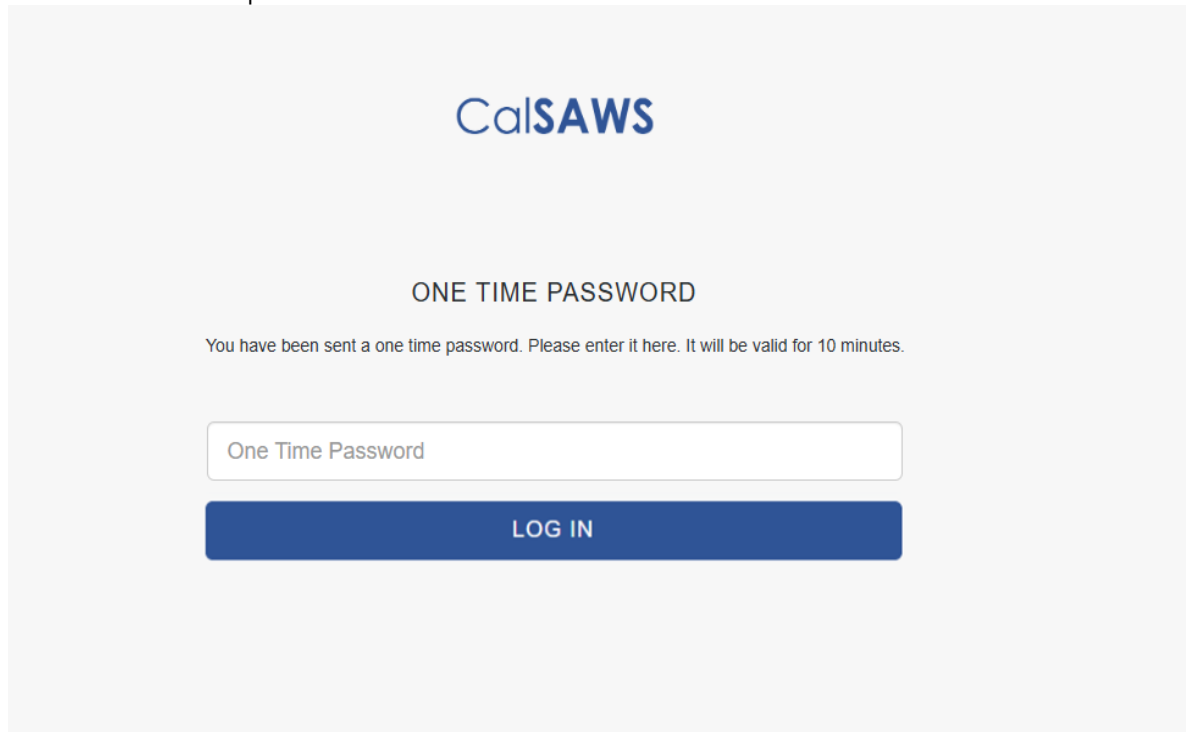
CalSAWS

You are accessing a U.S. Government information system. This system is for the use of authorized users only. Individuals using this computer system without authority, or in excess of their authority, are subject to having all of their activities on this system monitored and recorded by system personnel. Unauthorized use of the system is subject to civil and criminal penalties. In the course of monitoring individuals improperly using this system, or in the course of system maintenance, the activities of authorized users may also be monitored. Anyone using this system expressly consents to such monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, system personnel may provide the evidence of such monitoring to law enforcement officials.

ACCEPT

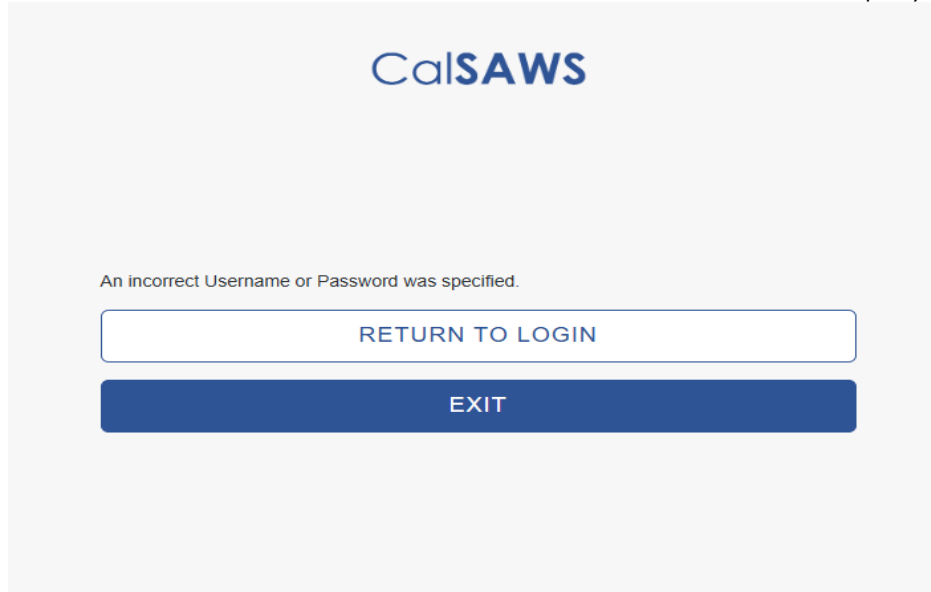
DECLINE

Enter the one-time password and click on **LOG IN**.



The image shows a login screen for CalSAWS. At the top is the CalSAWS logo. Below it is the heading "ONE TIME PASSWORD". A message states: "You have been sent a one time password. Please enter it here. It will be valid for 10 minutes." There is a text input field labeled "One Time Password". Below the input field is a blue button labeled "LOG IN".

If an incorrect password or username is entered, the user will have the option to **Return to Login** screen and enter the correct user credentials to access the Employee Portal.

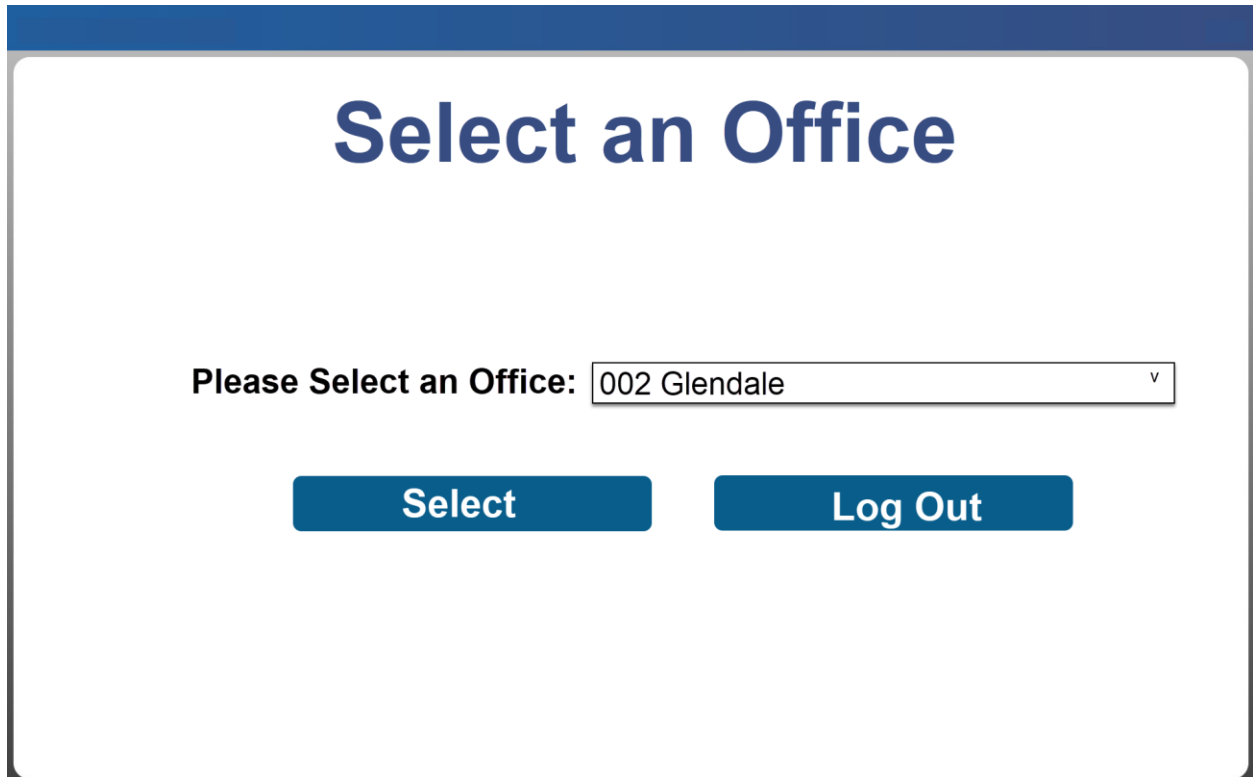


The image shows an error screen for CalSAWS. At the top is the CalSAWS logo. Below it is the message: "An incorrect Username or Password was specified." There are two buttons: a white button with a blue border labeled "RETURN TO LOGIN" and a solid blue button labeled "EXIT".

#### 1.1.4 Employee Portal Screen

The Select an Office screen automatically displays after the user is successfully authenticated in ForgeRock. Users that are associated to multiple offices will see their assigned location(s) in the drop list.

After the office is identified, click **Select** to access the Employee Portal landing screen.



## Select an Office

Please Select an Office: 002 Glendale ▼

Select Log Out

The Employee Portal displays the following option(s) based on county configuration:

- **Lobby Check-In**
- **Barcode Scanner**
- **Configure Kiosk**
- **Device Configuration**

*Note: The **Configure Kiosk** and **Device Configuration** option only displays for users with the 'RemoteKioskConfiguration' security right assigned. Most staff do not need this right for their daily functions.*

# Employee Portal

Lobby Check-In

Barcode  
Scanner

Configure Kiosk

Device  
Configuration

← Back

Log Out

If the user does not have the security right '*RemoteKioskConfiguration*' assigned to their CalSAWS User ID. They are limited to Lobby Check-In and Barcode Scanner button options.

# Employee Portal

Lobby Check-In

Barcode  
Scanner

← Back

Log Out

### 1.1.4.1 Device Configuration Screen

The purpose of the Device Configuration screen is to link a CalSAWS device number to the device. This is a necessary step for Kiosk to determine which office to associate Reception Log records to and which device action(s) to display.

Office: 002 Glendale

## Device Configuration

Please enter the Device Number that is to be configured for this device.

Save

← BackLog Out

Enter the Device Number that is generated in CalSAWS and click **Save**. The Device Number can be retrieved from the Device Management Detail screen or the Device Assignment screen.

Office: 002 Glendale

## Device Configuration

Please enter the Device Number that is to be configured for this device.

Save

← BackLog Out

### 1.1.4.2 Configure Kiosk Screen

The purpose of the Configure Kiosk screen is to update the flow associated with a device in an office.

The 'Please Select Device' field will display a list of devices assigned to the current user's office. If the user is associated to multiple offices the field will display devices for all locations.

The 'Please Select Flow' field will display a list of all available flows in the user's county.

**Office: 002 Glendale**

## Configure Kiosk

**The Self-Service kiosks in this office can be updated with a different flow from the selection below.**

**Please Select Device:**

**Please Select Flow:**

**Save** **Cancel**

**← Back** **Log Out**

A message will display when the user clicks on the **Save** button and there's an error being returned from the webservice.



Office: 002 Glendale

## Configure Kiosk

The Self-Service kiosks in this office can be updated with a different flow from the selection below.

**ERROR**

Update failed. Please try again or click Cancel to return to the previous page.

Close

Please Select Document:

Please Select Flow:

Save Cancel

← Back Log Out

### 1.1.4.3 Barcode Scanner Screen

The purpose of the barcode scanner screen is to scan a time-sensitive CalSAWS barcoded document to update the associated Customer Reporting entry for the document to 'Received'.

Select **Scan** to initiate the barcode scanner function.

Office: 002 Glendale

## Barcode Scanning Mode

Please Scan your document

Scan

← Back Log Out

# Barcode Scanning Mode

Please scan the barcode at the bottom of the customer reporting document.

A customer reporting document is shown, framed by large red brackets. The document contains the text: "If asked to return your forms by mail, use the prepaid envelope along with the address on the back of this sheet". Below this text, on the left, is "CF RE Packet". In the center, there is a long barcode. To the right of the barcode is a QR code and a clock icon. Below the QR code and clock icon is the text "Page 1 of 34".

Cancel

← Back

Log Out

Users will see the screen below when the device does not have a built-in camera, permission was not granted to access the built-in camera, or device is connected to a barcode reader.

# Barcode Scanning Mode

Please Scan your document

## ERROR

No printer found.  
Please check your printer connection.

Close

Cancel

← Back

Log Out

If using a barcode reader peripheral, proceed to scan the CalSAWS Customer Reporting document barcode.

# Barcode Scanning Mode

Please Scan your document

Cancel

← Back

Log Out

**Barcode Scanning Mode (barcode scanner view with barcode reader)**

If the barcode has been successfully scanned, the Customer Reporting entry for the associated document that was scanned will be updated to 'Received' status and when user clicks on the **Log Out** button a receipt will be generated.

**Office: 002 Glendale**

# Barcode Scanning Mode

**Thank you. Document has been processed successfully.**

**Please scan your next document.**

← Back

Scan

Log Out

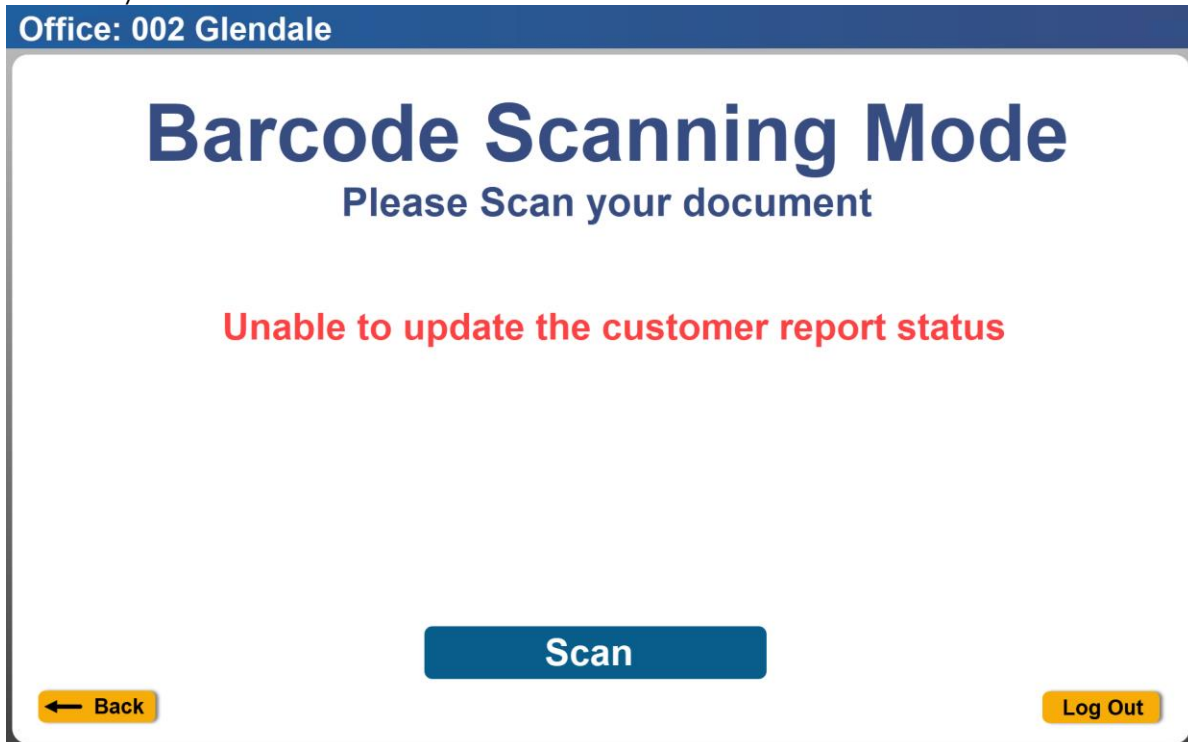
**Los Angeles**  
002 Glendale  
4680 San Fernando Rd  
Glendale CA 91204  
January 22, 2025 12:30 PM

**Document Receipt**

**Case Number:** A123456

**Document Type:** SAR 7

The screen below is displayed when the scanner has failed to scan the barcode successfully.



Office: 002 Glendale

# Barcode Scanning Mode

Please Scan your document

Unable to update the customer report status

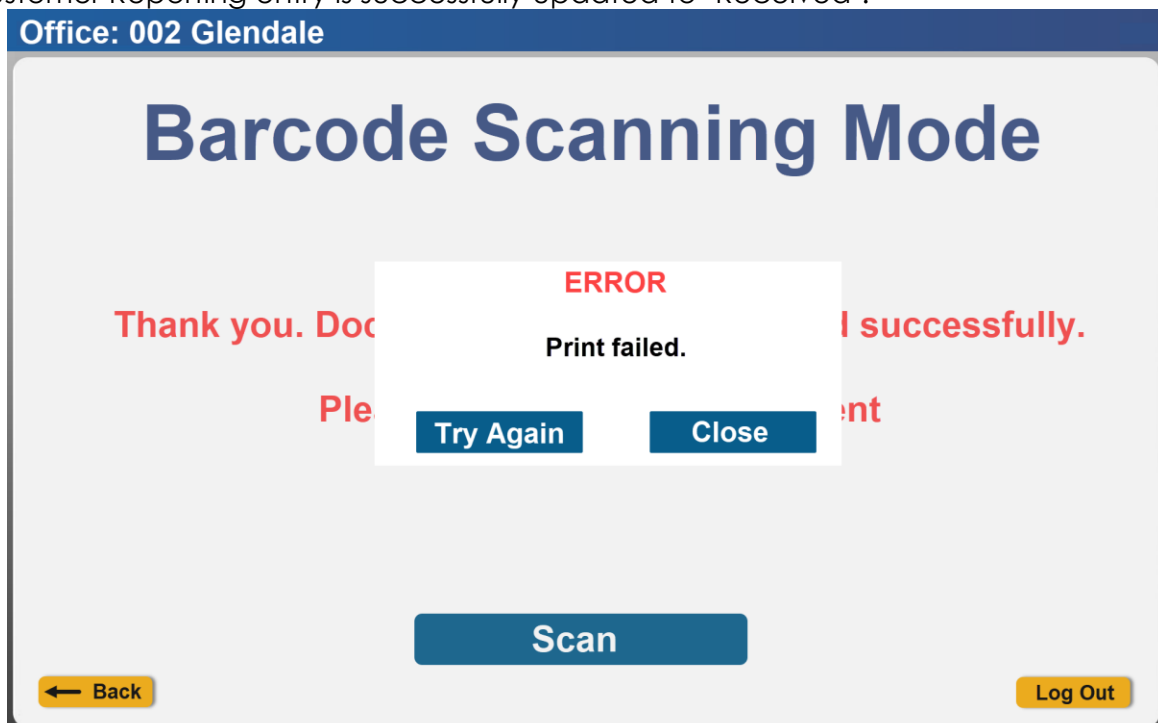
Scan

← Back Log Out

This screenshot shows a software interface for barcode scanning. At the top, a dark blue header bar contains the text 'Office: 002 Glendale'. Below this, the main area has a white background. The title 'Barcode Scanning Mode' is displayed in a large, bold, dark blue font. Underneath the title, the instruction 'Please Scan your document' is written in a smaller, dark blue font. A red error message, 'Unable to update the customer report status', is centered on the screen. At the bottom center, there is a large blue button labeled 'Scan'. In the bottom left corner, there is a yellow button with a left-pointing arrow and the text 'Back'. In the bottom right corner, there is a yellow button labeled 'Log Out'.

**Barcode Scanning Mode (Fail Scan)**

The screen below is displayed when the receipt fails to print but the status on the Customer Reporting entry is successfully updated to 'Received'.



Office: 002 Glendale

# Barcode Scanning Mode

Thank you. Document successfully.  
Please Try Again

ERROR  
Print failed.

Try Again Close

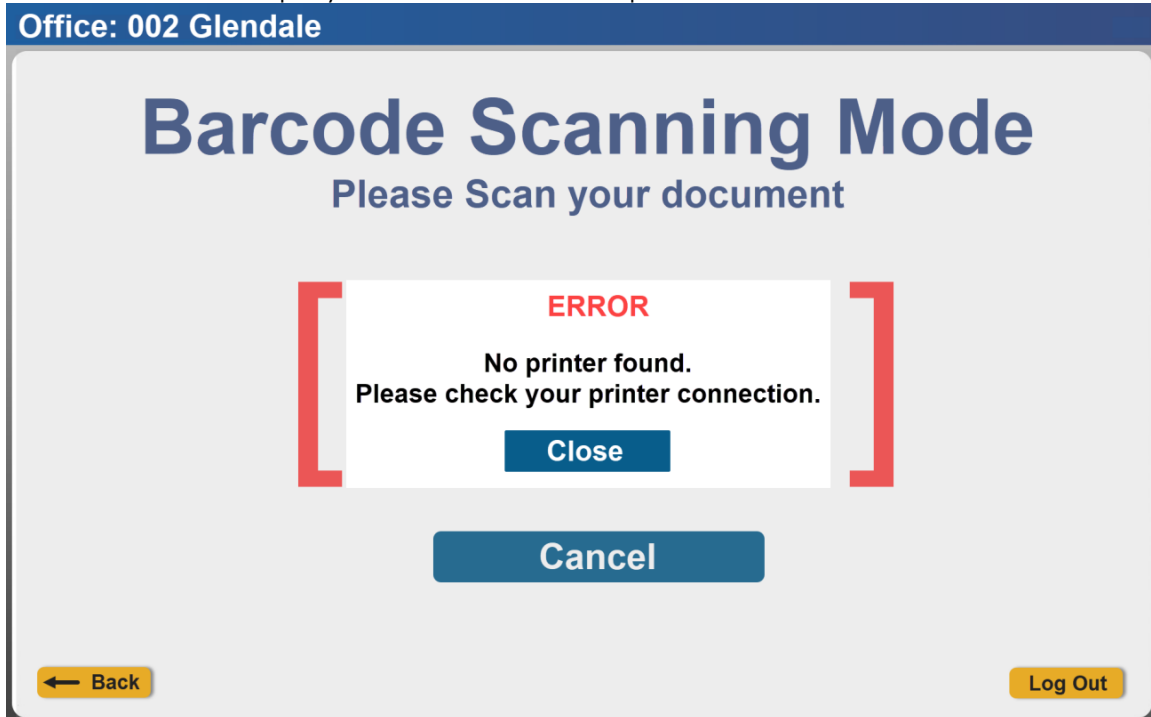
Scan

← Back Log Out

This screenshot shows the same software interface as the previous one, but with an error message pop-up. The header bar and title are the same. The main area has a light gray background. The instruction 'Please Scan your document' is still present. The error message 'Unable to update the customer report status' is still present. The 'Scan' button is still present. The 'Back' and 'Log Out' buttons are still present. A new error message pop-up is displayed in the center. The pop-up has a white background and a red border. It contains the text 'ERROR' in red, 'Print failed.' in black, and 'Thank you. Document successfully.' in red. Below this text are two blue buttons: 'Try Again' and 'Close'.

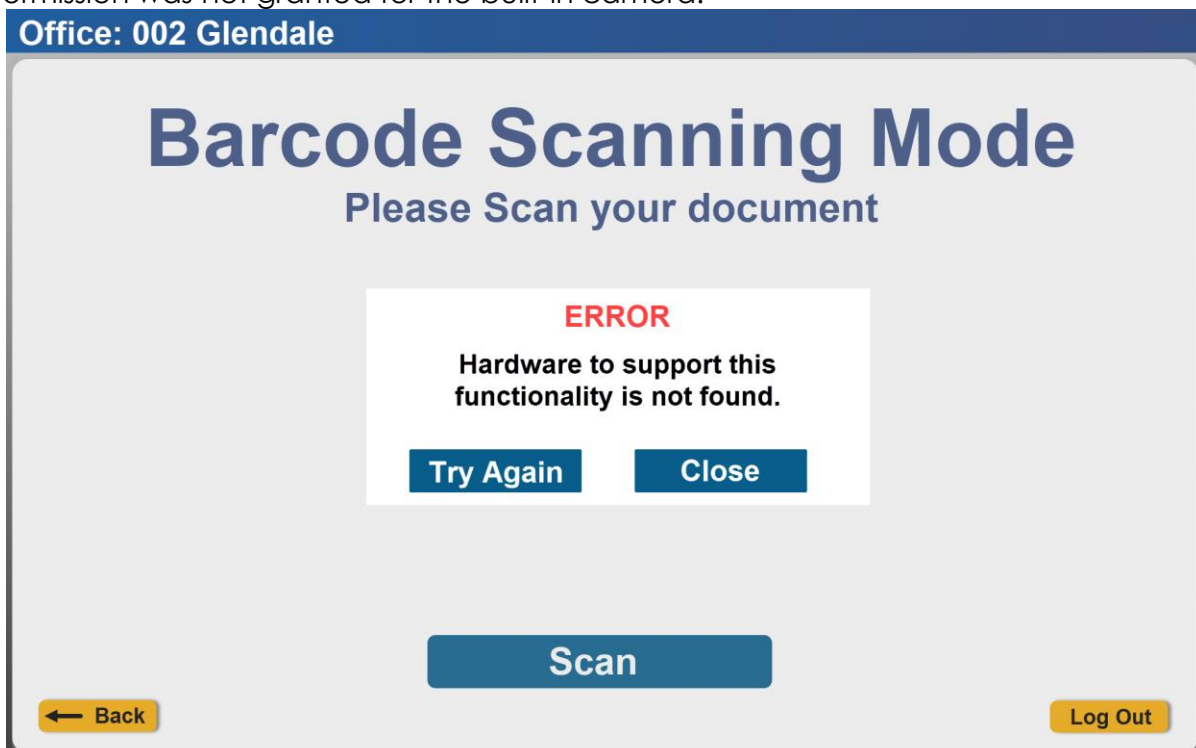
**Barcode Scanning Mode (Error message pop-up for receipt failed)**

The screen below is displayed when there is no printer connection found.



**Barcode Scanning Mode (Error message pop-up for no printer found)**

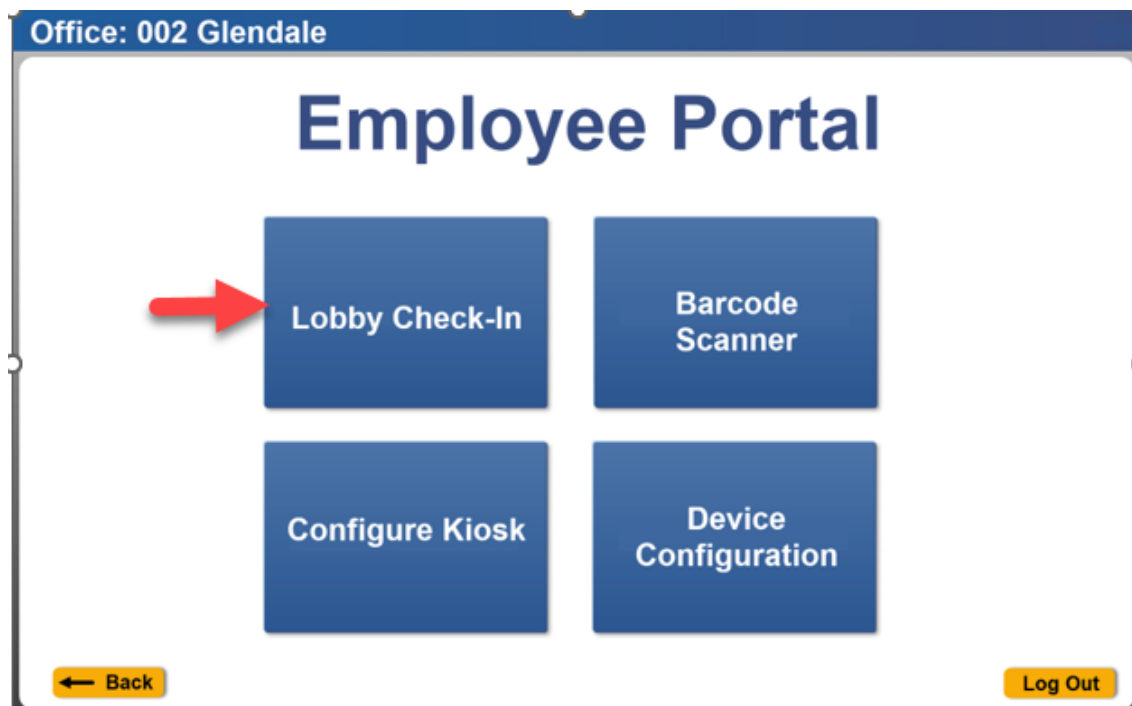
The screen below is displayed when there is no barcode scanner, built in camera or permission was not granted for the built-in camera.



**Barcode Scanning Mode (Error message pop-up for no barcode scanner found, no built-in camera or permission not granted for built in camera)**

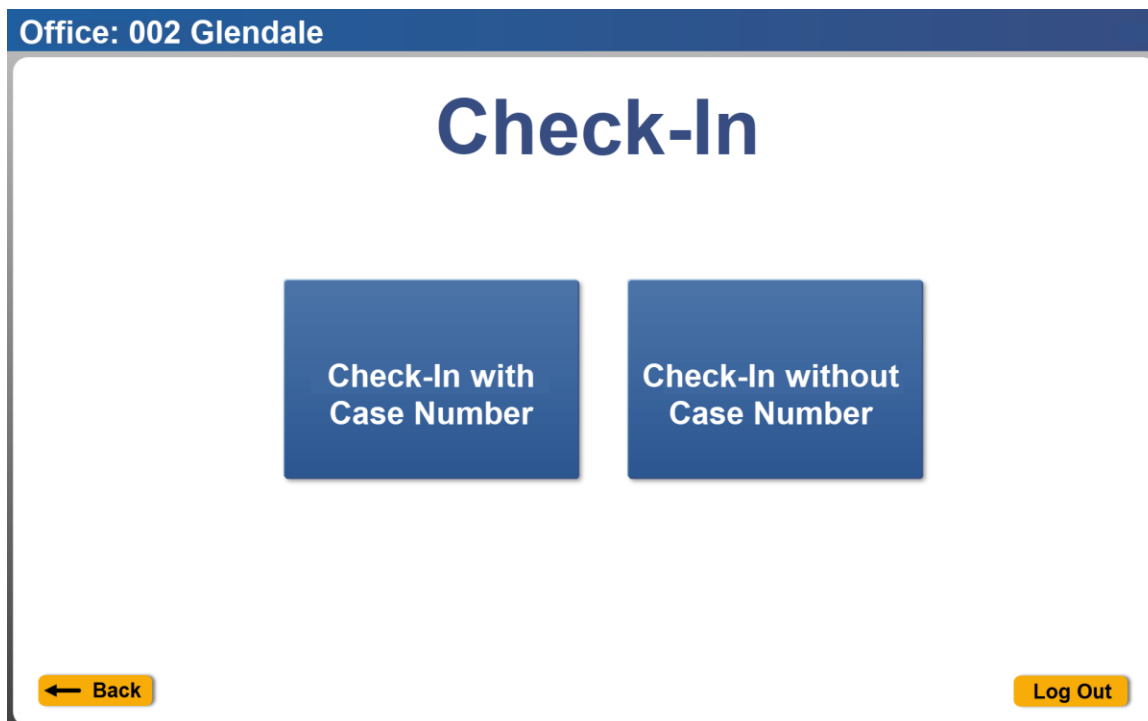
#### 1.1.4.4 Lobby Check-In Screen Mockup

Lobby Check-In screens display after the user clicks on the '**Lobby Check-In**' button from the Employee Portal screen.



Clicking on the **Check-In with Case Number** button will re-direct the user to the 'Check-In' screen.

Clicking on the **Check-In without Case Number** button will re-direct the user to the 'Check-In: Add Individual' screen.



#### 1.1.4.4.1 Lobby Check-in Without Case Number

In order to check-in without a case number, the user is prompted to enter all the required fields on the 'Check-In: Add Individual' screen. The fields that are required are:

1. First and Last Name
2. Visit Purpose

Office: 002 Glendale

## Check-In: Add Individual

Please enter all required fields

First and Last Name: (required)

Language:

Program:

Visit Purpose: (required)

Individual Type:

Emergency Requests:

Special Circumstances:

[← Back](#) [Check-In](#) [Log Out](#)

Once the required information is entered, the **Check-In** button can be clicked.

Office: 002 Glendale

## Check-In: Add Individual

Please enter all required fields

First and Last Name: (required)

Language:

Program:

Visit Purpose: (required)

Individual Type:

Emergency Requests:

Special Circumstances:

[← Back](#) [Check-In](#) [Log Out](#)



A check-in confirmation screen will be displayed after each successful check-in. Users can print a receipt by clicking on **Print Receipt** option or click on **Close** to return to Employee Portal home screen.

**Office: 002 Glendale**

# Check-In

Check-In complete.  
Please print the Assigned Number

L1

**Print Receipt****Close**

← Back

Log Out

## Check-In Receipt

### Los Angeles

002 Glendale  
4680 San Fernando Rd  
Glendale CA 91204  
January 22, 2025 12:30 PM

Assigned Number: B30

Case Number: A123456

Please take a seat and wait for your number to display on the monitor. Proceed to the room number displayed for service. Thank you.

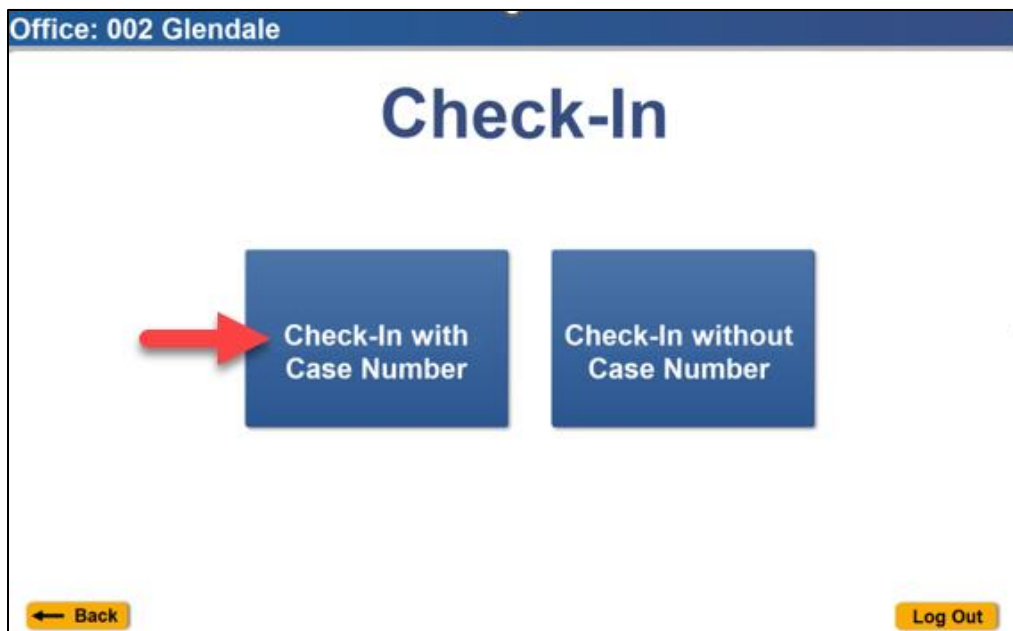
Access your case info online at  
**[www.benefitscal.com](http://www.benefitscal.com)**

If the check-in has failed, an error message will be displayed asking the user to try again. Click **Close** and **Check-In** to try again, or click the **← Back** button on the footer of the screen to navigate back to the 'Check-In Landing' screen.

The screenshot displays a web form titled "Check-In: Add Individual" for "Office: 002 Glendale". The form prompts the user to "Please enter all required fields". An error modal is centered on the screen, stating "ERROR" in red, followed by "Check-In failed. Please try again." and a "Close" button. The form fields include "Language:", "Visit Purpose: (required)" with a dropdown menu showing "Appointment", "Emergency Requests:" with a dropdown menu showing "v", "Special Circumstances:" with a dropdown menu showing "v", and a "Type:" dropdown menu showing "v". At the bottom of the form are three buttons: "← Back", "Check-In", and "Log Out".

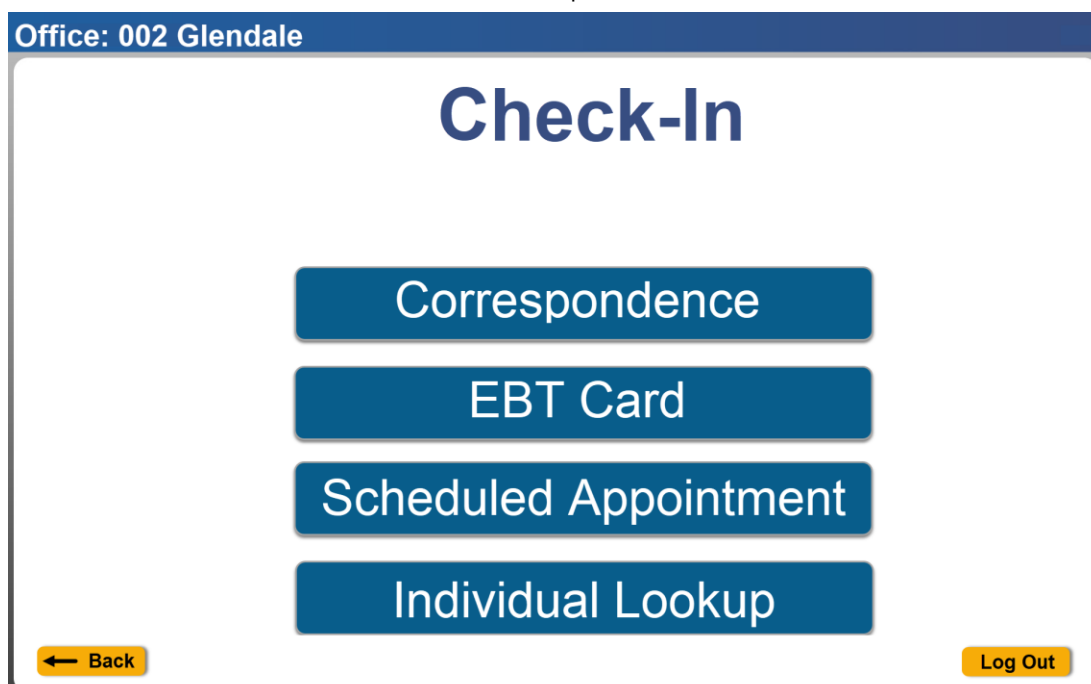
#### 1.1.4.4.2 Lobby Check-In with Case Number

The 'Check-In' screen is accessed when the user clicks on the **Check-In with Case Number** button from the 'Check-In Landing' screen.



The user has four options to choose from to check in with case number.

1. **Correspondence**- Clicking on the "Correspondence" button will re-direct the user to the 'Check-In: Correspondence' screen.
2. **EBT Card**- Clicking on the "EBT Card" button will trigger the application to look for a card reader that is configured to the device and re-direct the user to the 'Check-In: EBT Card' screen.
3. **Scheduled Appointment**- Clicking on the "Scheduled Appointment" button will call the existing appointments and will re-direct the user to the 'Check-In: Appointments' screen.
4. **Individual Lookup**- Clicking on the "Individual Lookup" button will re-direct the user to the 'Check-In: Individual Lookup' screen.



#### 1.1.4.4.2.1      **Check-In: Correspondence**

When the user selects the **Correspondence** option, the 'Check-In: Correspondence' screen is displayed with barcode scanning instructions.

**Office: 002 Glendale**

## Check-In: Correspondence

Please scan the barcode at the bottom of the CalSAWS document.

QR Code



**Scan**

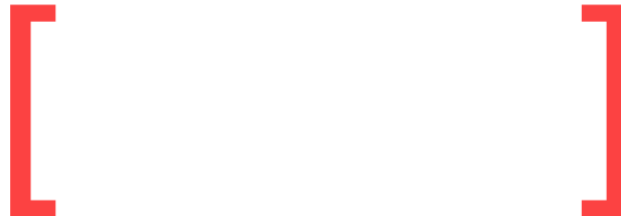
 **Back**

**Log Out**

Clicking the **Scan** button will trigger the application to look for the barcode scanner device or to access the built-in camera of the device.

# Check-In: Correspondence

Please scan the barcode at the bottom of the CalSAWS document.



← Back

Log Out

When there's no barcode reader detected, permission is not granted to access the built-in camera, or when the device does not have a built-in camera the error message below is displayed.

# Check-In: Correspondence

Please scan the barcode at the bottom of the CalSAWS document

QR Code

**ERROR**

Hardware to support this  
functionality is not found.

Close

Scan

← Back

Log Out

When no case number is returned the error message below will display. Clicking on the **Close** button will close the message.

The screenshot shows a mobile application interface for 'Office: 002 Glendale'. The main heading is 'Check-In: Correspondence' in large blue font. Below it, instructions read 'Please scan the barcode at the bottom of the CalSAWS document'. A 'QR Code' label is positioned above a white error box. The error box contains the word 'ERROR' in red, followed by the message 'No Case Number is found' and a blue 'Close' button. Below the error box is a large blue 'Scan' button. At the bottom left is a yellow '← Back' button, and at the bottom right is a yellow 'Log Out' button.

When the case number is returned, user selects the case, they are directed to the 'Case Number Lookup' screen (Please refer to [section 1.1.4.4.3](#)) to select the program/visit purpose or upload document or drop off document and to complete check-in process.

#### **1.1.4.4.2.2 Check-In: EBT Card**

When the user selects the **EBT Card** option, the 'Check-In: EBT Card' screen will be displayed with instructions to swipe the EBT Card at the top of the screen.

# Check-In: EBT Card

Please swipe the EBT Card



← Back

Log Out

If the swipe was successful, User will then be re-directed to the 'Check-In: Search by Case Number' screen. The 'Case Number' screen will display a list of Case Number that belongs to the same county.

The user can then **Select** the case number from the search results to check-in. When the user selects the case, they are directed to the 'Case Number Lookup' screen (Please refer to [section 1.1.4.4.3](#)) to select the program/visit purpose or upload document or drop off document and to complete check-in process.

## Check-In: Search by Case Number

Case Number:



A123456

**Search**

A123456

**Select****← Back****Log Out**

### 1.1.4.4.2.3 Check-In Appointments

The 'Check-In: Appointments' screen is accessed when the user clicks on the **Scheduled Appointment** button from the Check-In screen.

The user can enter the case number in the Case Number field and click on the **Search** button to look up the list of appointments for the day and for the specific office.

The user can **Select** the appointment from the search results to check-in and are redirected to the 'Purpose of Visit' screen. (refer to [section 1.1.4.4.4](#)).

*Note: The search results will display only appointments with a status of Scheduled or Rescheduled.*



Office: 002 Glendale

# Check-In: Appointments

Case Number: 

Sort By:

Nicole Palmer 09:30AM Intake Interview	<input type="button" value="Select"/>
Daisy Duck 09:45AM General Appointment	<input type="button" value="Select"/>
Donald Duck 09:45AM General Appointment	<input type="button" value="Select"/>
Edward King 10:15AM Re-Evaluation CW/CF Interview	<input type="button" value="Select"/>
Erica Montes 10:30AM Telephone Interview	<input type="button" value="Select"/>

When there are no appointments returned from the case search the error below displays.

Office: 002 Glendale

# Check-In: Appointments

Case Number: 

Sort By:

There are no appointments found for this office.

#### 1.1.4.4.2.4 Check-In: Individual Lookup

The 'Check-In: Individual Lookup' screen is accessed when the user clicks on the **Individual Lookup** button from the 'Check-In' screen. Individuals can be looked up by:

1. **Case Number**- Clicking the "Case Number" button will re-direct the user to the 'Check-In: Search by Case Number' screen.
2. **Name** - Clicking on the "Name" button will re-direct the user to the 'Check-In: Search by Name' screen.
3. **CIN** - Clicking on the "CIN" button will re-direct the user to the 'Check-In: Search by CIN' screen.
4. **BenefitsCal E-mail** - Clicking on the "BenefitsCal E-mail" button will re-direct the user to the 'Check-In: Search by BenefitsCal E-mail' screen.

Office: 002 Glendale

## Check-In: Individual Lookup

Case Number

Name

CIN

BenefitsCal E-mail

← Back

Log Out

##### 1.1.4.4.2.4.1 Check-In: Search by Case Number

The 'Check-In: Search by Case Number' screen is accessed When the user clicks on the **Case Number** button from the 'Check-In: Individual Lookup' screen.

The user can enter the customer's Case Number in the **Case Number** text field and click on **Search** Button.

Once the user enters the required data, the search button is enabled, and the user can click on **Search** button for results.

## Check-In: Search by Case Number

Case Number:

 Enter Case Number

Search

 Back

Log Out

## Check-In: Search by Case Number

Case Number:

 A123456



Search

 Back

Log Out

If the case number is found, the results will appear on the 'Check-In: Search by Case Number' screen.

When the user selects the case, they are directed to the 'Case Number Lookup' screen (Please refer to [section 1.1.4.4.3](#)) to select the program/visit purpose or upload document or drop off document and to complete check-in process.

**Office: 002 Glendale**

## Check-In: Search by Case Number

**Case Number:**

**Search**

A123456

Select

← Back

Log Out

When there's no case number found for the County that the logged in user belongs to, the result section will display the message 'No case number found for this County.'

Office: 002 Glendale

## Check-In: Search by Case Number

Case Number:

**Search**

No case number found for this County.

[← Back](#) [Log Out](#)

#### 1.1.4.4.2.4.2 Check-In: Search by Name

The 'Check-In: Search by Name' screen is accessed when the user clicks on the Name button from the 'Check-In: Individual Lookup' screen.

The user is then prompted to enter all required fields, including an SSN or a Date of Birth.

Once the user enters the required data, the search button is enabled, and the user can click on **Search** button for results.

## Check-In: Search by Name

Please enter all required fields, including a SSN or a Date of Birth.

First Name: (required)

Last Name: (required)

SSN:

Date of Birth:

Search

← Back

Log Out

## Check-In: Search by Name

Please enter all required fields, including a SSN or a Date of Birth.

First Name: (required)

Last Name: (required)

SSN:

Date of Birth:

Search

← Back

Log Out

When the user selects the case, they are directed to the 'Case Number Lookup' screen (Please refer to [section 1.1.4.4.3](#)) to select the program/visit purpose or upload document or drop off document and to complete check-in process.

**Office: 002 Glendale**

## Check-In: Search by Name

Please enter all required fields, including a SSN or a Date of Birth.

**First Name:** (required)

John

**Last Name:** (required)

Doe

**SSN:**

**Date of Birth:**

01/21/1981

Search

A123456	Select
2545358	Select
5681236	Select
8985456	Select

← Back

Log Out

When there's no case number found, the result section will display the message 'No case number found for this County,' in red.

## Check-In: Search by Name

Please enter all required fields, including a SSN or a Date of Birth.

First Name: (required)

Last Name: (required)

SSN:

Date of Birth:

Search

No Case Number(s) found for this County

← Back

Log Out

### 1.1.4.4.2.4.3 Check-In: Search by CIN

The 'Check-In: Search by CIN' screen is accessed when the user clicks on the CIN button from the 'Check-In: Individual Lookup' screen.

The user can enter the customer's CIN number in the **CIN** text field once the user enters the required data, the search button is enabled, and the user can click on **Search** button for results.



## Check-In: Search by CIN

CIN:

Search

← Back

Log Out

## Check-In: Search by CIN

CIN:

Search

← Back

Log Out

The search results will display a list of case numbers found in the county that the logged in user is associated to and where the person (based on the CIN number) is a part of.

When the user selects the case, they are directed to the 'Case Number Lookup' screen (Please refer to [section 1.1.4.4.3](#)) to select the program/visit purpose or upload document or drop off document and to complete check-in process.

**Office: 002 Glendale**

## Check-In: Search by CIN

CIN:

**Search**

A123456	<b>Select</b>
2545358	<b>Select</b>
5681236	<b>Select</b>
8985456	<b>Select</b>

**← Back****Log Out**

When there's no case number being returned, the message 'No Case Number(s) found for this County' will be displayed.

**Office: 002 Glendale**

## Check-In: Search by CIN

CIN:

**Search**

No Case Number(s) found for this County

**← Back****Log Out**

#### 1.1.4.4.2.4.4 Check-In: Search by BenefitsCal E-mail

The 'Check-In: Search by BenefitsCal E-mail' screen is accessed when the user clicks on the **BenefitsCal E-mail** button from the 'Check-In: Individual Lookup' screen.

To use this feature, the customer must already be registered in BenefitsCal and have their case linked to their BenefitsCal account.

The user can enter the customer's BenefitsCal E-mail in the **E-Mail** text field. Once the user enters the required data, the search button is enabled, and the user can click on **Search** for results.

**Office: 002 Glendale**

## Check-In: Search by BenefitsCal E-Mail

**E-Mail:**

**Search**

[← Back](#)[Log Out](#)

## Check-In: Search by BenefitsCal E-Mail

E-Mail:



JohnDoe@test.org



Search

← Back

Log Out

The search results will display a list of case numbers found in the county that the logged in user is associated to and where the person (based on the BenefitsCal E-mail) is a part of.

When the user selects the case, they are directed to the '**Case Number Lookup**' screen (Please refer to [section 1.1.4.4.3](#)) to select the program/visit purpose or upload document or drop off document and to complete check-in process.

## Check-In: Search by BenefitsCal E-Mail

E-Mail:



JohnDoe@test.org



Search

B251S68

Select

← Back

Log Out

When there's no case number found for the BenefitsCal email, the message 'No Case Number(s) found for this County' is displayed in red

## Check-In: Search by BenefitsCal E-Mail

E-Mail:



mickey.mouse@test.org



Search

No Case Number(s) found for this County

← Back

Log Out

#### 1.1.4.4.3 Lobby Check-in Case Number Lookup

The 'Case Number' lookup screen is accessed when the user clicks on the **Select** button for the corresponding Case Number on the result section from the following screens.

- Check-in: Correspondence
- Check-in: EBT card
- Check-In: Search by Case Number
- Check-In: Search by Name
- Check-In: Search by CIN
- Check-In: Search by BenefitsCal E-mail

The 'Case Number' lookup screen will display a list of programs that are still assigned to a worker for the selected Case Number along with the program status.

**Program** section displays a list of programs that is still assigned to a worker for the selected Case Number along with the program status.

**Office: 002 Glendale**

**Case Number: A123456**

Programs	
CalWORKs: <b>Denied</b>	Select
CalFresh: <b>Active</b>	Select
Immediate Need: <b>Active</b>	Select
Medi-Cal: <b>Active</b>	Select
Upload Document(s)	Select
Print Receipt for Drop Off	Select

← Back

Log Out

Clicking on the **Select** button by a Program will hide the **Upload Document(s)** and the **Print Receipt for Drop Off** section and display the **Participants** section.

## Case Number: A123456

### Programs

CalWORKs: **Denied****Select**CalFresh: **Active****Select**Immediate Need: **Active****Select**Medi-Cal: **Active****Select**

### Participants

John Doe

Program: Medi-Cal Worker ID: 19DP341707

**Select****← Back****Log Out**

Once the user clicks on the **Select** button in the participants section the user is directed to the 'Purpose of Visit' screen (Please refer to [section 1.1.4.4.4](#)).

#### **1.1.4.4.3.1 Upload Document(s)**

'Upload Document(s) Quick Guide' screen that is accessible by clicking the **Select** button on the **Upload Document(s)** section found on the 'Case Number Lookup' screen.

**Note**-The functionality to upload documents through the Lobby Check-In functionality flow (Employee facing) can't be supported for the Kiosk device. This is due to the Kiosk not having a built-in camera.

Office: 002 Glendale

Case Number: A123456

Programs

CalWORKs: Denied

Select

CalFresh: Active

Select

Immediate Need: Active

Select

Medi-Cal: Active

Select

Upload Document(s)

Select

Print Receipt for Drop Off

Select

← Back

Log Out

Clicking on the **Next** button will open the camera view (camera view will look different and will have different functionalities as this is dependent on the device that is used).

Office: 002 Glendale

Upload Document(s)

Quick Guide

1) Place the document on a flat, well lit surface.

2) Take a photo of the document straight on, and not at an angle.

3) Match the orientation of the document and make sure there are no other objects in the photo.

4) Don't cover any information.

5) Don't take or submit blurry photos.

Next

← Back

Log Out

Form Z

PHOTO

Cancel

CalSAWS | Employee Portal Walkthrough

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2:42 PM Tue Jan 14 78%

STATE OF CALIFORNIA

CERTIFICATION OF VITAL RECORD

STATE OF CALIFORNIA

DEPARTMENT OF PUBLIC HEALTH

CERTIFICATE OF LIVE BIRTH

STATE OF CALIFORNIA

USE BLACK INK ONLY

STATE FILE NUMBER

LOCAL REGISTRATION NUMBER

1A. NAME OF CHILD - FIRST

1B. MIDDLE

1C. LAST

2. SEX

3A. TIME BIRTH, SINGLE, TWIN, ETC.

3B. IF MULTIPLE, THIS CHILD 1ST, 2ND, ETC.

4A. DATE OF BIRTH - MONTH/DAY

4B. HOUR - 24 CLOCK TIME

5A. PLACE OF BIRTH - NAME OF HOSPITAL OR FACILITY

5B. STREET ADDRESS - STREET AND NUMBER OR LOCATION

5C. CITY

5D. COUNTY

6A. LAST NAME

6B. MIDDLE NAME

6C. FIRST NAME

6D. RELATION TO CHILD

7A. LAST NAME

7B. MIDDLE NAME

7C. FIRST NAME

7D. RELATION TO CHILD

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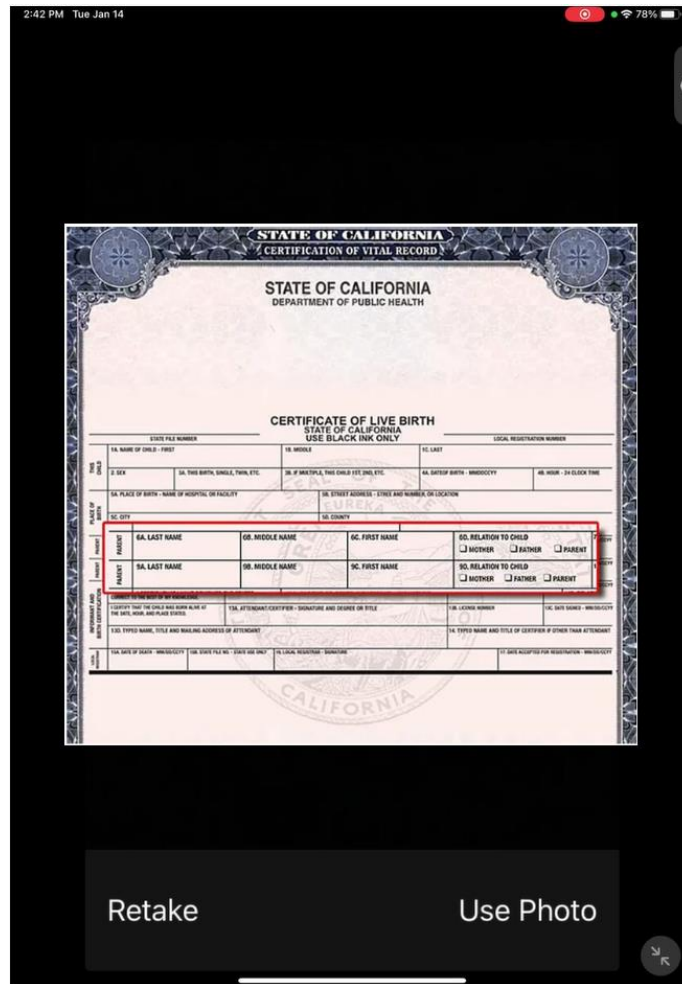
100. SIGNATURE OF THE CLERK OF THE COUNTY

PHOTO

Cancel

CalSAWS | Employee Portal Walkthrough

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Once a document/image is captured, the user is directed to the upload document(s) screen where the user will need to select the **Program Type**, **Select Individual** and **Document Type**.

1. **Program Type**- This will have a list of programs with a worker assigned for the selected Case Number.
2. **Select Individual**- This will have the list of participants for the selected program.
3. **Document Type** – This will list specific, commonly uploaded types of documents.

# Upload Document(s)



Program Type:  v  
Select Individual:  v  
Document Type:  v

← Back

Finish

Log Out

# Upload Document(s)



Program Type: CalFresh v  
Select Individual: John Doe v  
Document Type: Citizenship/Immigration/Birth Certificate v

← Back

Finish

Log Out

Clicking the **Next** button when it is enabled (in blue) will re-direct the user to the 'Review Document(s)' screen where the user has an option to **Add More** or **Submit** documents. Selecting **Add More** prompts users to capture additional screens or documents following the above steps.

Office: 002 Glendale

## Review Document(s)

Please review your uploaded document(s) before submitting



Add More


Submit

← Back

Log Out


# Review Document(s)

Please review your uploaded document(s) before submitting



John Doe  
Citizenship/Immigration/Birth Certificate

Delete



John Doe  
Social Security Card

Delete

Add More

Submit

← Back

Log Out

Once the user clicks on **Submit**, if the submission is successful, it will automatically generate and print an uploaded document(s) receipt. The following pop-up message will display, "All uploaded documents will be reviewed before the reporting process is considered complete."

## Review Document(s)

Please review your uploaded document(s) before submitting

### Successful Submission

All uploaded documents will be reviewed before the reporting process is considered complete.

Close

Add More

Submit

← Back

Log Out

### Los Angeles

002 Glendale  
4680 San Fernando Rd  
Glendale CA 91204  
January 22, 2025 12:30 PM

### Receipt for Uploaded Document(s)

Case Number: A123456

Access your case info online at  
[www.benefitscal.com](http://www.benefitscal.com)

If the submission is unsuccessful, the following pop-up message will display under the **Submission Failed** text, "An error occurred while submitting your verification document(s). Please try again."

# Review Document(s)

Please review your uploaded document(s) before submitting

## Submission Failed

An error occurred while submitting  
your verification document(s).  
Please try again.

Close

Add More

Submit

← Back

Log Out

### 1.1.4.4.3.2 Print Receipt for Drop Off

If the customer is at the office to drop off any time sensitive documents, the user can select any of the below receipt types listed under the **Receipt Types** section of the screen.

1. Drop of Documents
2. QR7/SAR7
3. RE/RD

# Print Receipt for Drop Off

Case Number: A123456

## Receipt Types:

Drop off Document(s)

Select

QR7 / SAR7

Select

RE/RD

Select

← Back

Log Out

Clicking on the **Select** button will automatically print a receipt when the application detects the printer automatically and re-direct the user back to the 'Check-In Landing' screen.



## **Los Angeles**

002 Glendale  
4680 San Fernando Rd  
Glendale CA 91204  
January 22, 2025 12:30 PM

### **Receipt for Drop off Document(s)**

Case Number: A123456

Access your case info online at  
**[www.benefitscal.com](http://www.benefitscal.com)**

## **Los Angeles**

002 Glendale  
4680 San Fernando Rd  
Glendale CA 91204  
January 22, 2025 12:30 PM

### **Receipt for QR7/SAR7**

Case Number: A123456

Access your case info online at  
**[www.benefitscal.com](http://www.benefitscal.com)**

**Los Angeles**  
002 Glendale  
4680 San Fernando Rd  
Glendale CA 91204  
January 22, 2025 12:30 PM

**Receipt for RE/RD**

Case Number: A123456

Access your case info online at  
**[www.benefitscal.com](http://www.benefitscal.com)**

#### 1.1.4.4.4 Purpose Of Visit

'Purpose of Visit' screen is accessible when the user clicks on the **Select** button for a specific appointment found on the 'Check-In: Appointments' screen (See [section 1.1.4.4.2.3](#)) or clicks on the **Select** button for a specific participant found under the **Participants** section on the 'Case Number' screen (See [section 1.1.4.4.2.4](#)).

**Individual** is the name of the participant for the appointment that was selected from **Check-In** and **Visit Purpose** will automatically have **Appointment** selected.

# Purpose of Visit

Individual:	<input type="text" value="Daisy Duck"/>
Visit Purpose (required):	<input type="text" value="Appointment"/>
Language:	<input type="text" value="v"/>
Program:	<input type="text" value="v"/>
Individual Type:	<input type="text" value="v"/>
Emergency Request:	<input type="text" value="v"/>
Special Circumstances:	<input type="text" value="v"/>

[Check-In](#)[← Back](#)[Log Out](#)

**Visit Purpose** will default to **blank** when the screen opens when the 'Purpose of Visit' screen was accessed through the 'Case Number' screen.

# Purpose of Visit

Individual:	<input type="text" value="Daisy Duck"/>
Visit Purpose (required):	<input type="text" value="v"/>
Language:	<input type="text" value="v"/>
Program:	<input type="text" value="v"/>
Individual Type:	<input type="text" value="v"/>
Emergency Request:	<input type="text" value="v"/>
Special Circumstances:	<input type="text" value="v"/>

[Check-In](#)[← Back](#)[Log Out](#)

**Check-In** button will be enabled (blue in color) when all required fields (**Individual** and **Visit Purpose**) have a value entered/selected.

Office: 002 Glendale

## Purpose of Visit

**Individual:** Daisy Duck

**Visit Purpose** (required): Appointment v

**Language:** v

**Program:** v

**Individual Type:** v

**Emergency Request:** v

**Special Circumstances:** v

**Check-In**

← Back Log Out

Clicking on the '**Case Number**' lookup button will create a Reception Log Detail record in CalSAWS and generate a check-in number to be assigned to the check-in.

Office: 002 Glendale

## Check-In

Check-In complete.  
Please print the Assigned Number

L1

**Print Receipt** **Close**

← Back Log Out

#### 1.1.4.4.5 Select Printer

'Select Printer' screen is accessible when the application is generating a receipt to be printed, and the application does not detect the printer automatically when clicking on the **Select** button from the three options listed on:

- The 'Print Receipt for Drop Off' screen,
- **Print Receipt** button found on the pop-up message that is displayed on the 'Check-In' screen, or the
- **Submit** button found on the 'Review Document(s)' screen

When the application can detect a printer, the printer information will display on the **Selected Printer** field.

*Note- The Select Printer text field is not be editable. User is not able to enter information on the text field, the application will auto populate the name of the printer onto the text field when a printer is found.*

**Office: 002 Glendale**

# Select Printer

## Assigned Number: L1

**Selected Printer:**

Search

Print

← Back

Log Out

# Select Printer

**Selected Printer:** 10.68.164.35

Search

Print

← Back

Log Out

An Error pop-up message will display when the user is re-directed to the 'Select Printer' screen and the application cannot detect a printer automatically when the screen initially loads, or when the user clicks on the **Print** button on the 'Select Printer' screen and the application cannot detect a printer automatically.



Pop-up error message 'There are no printer found' will display when the user clicks on the **Search** button on the 'Select Printer' screen and the application cannot detect a printer automatically.

