

CalSAWS Enhancement Request (CER)

CER Form Completion and Submission

This Quick Process Guide provides Counties with instructions and examples for completing the CalSAWS Enhancement Request (CER) Form. The CER Form captures the business need, desired outcome, operational context, and expected business driver(s) associated with an enhancement request.

Tips for a Strong CER

When completing the CER:

- Clearly describe the current issue, business need, and operational challenge.
- Focus on the required capability and desired outcome rather than a specific design.
- Describe the operational impact, including frequency and examples when available
- Identify known workarounds and other relevant context.
- If Compliance with Policy and Regulations is selected, identify the applicable policy or regulatory reference.

Technical design and implementation approaches will be evaluated through the CalSAWS review process.

Examples of CER Writing

A CER should explain the capability or business outcome that is needed and why, without prescribing a specific technical design.

Table 1: Less and More Effective CER Writing

Less Effective: Design-Specific Request	More Effective: Required Capability/Business Outcome
"Add a new button that shows recent case activity."	"Provide functionality that allows staff to more efficiently identify and review relevant recent case activity and outstanding work needed to determine the appropriate next action."

Remember: Describe the needed capability or outcome and the business reason for the request. Avoid prescribing a screen design, button, field placement, or technical implementation unless the detail is necessary to explain the business need.



Completing the CER Form

The following explains how to complete each section of the CER Form. One sample request—Improved Visibility of Recent Case Activity and Outstanding Work—is used throughout the Guide so the relationship between sections is clear.

Section 1 – Request Information

Provide the basic submission information and identify all applicable programs and operational areas.

- **Submission Date** – Date submitted to CalSAWS by PPOC
- **Region** – Region submitting the CER
- **County** – County submitting the CER
- **Submitter Name, Email and Phone** – PPOC contact information
- **Enhancement Title** – Short and meaningful title of the CER
- **Program(s) Impacted** – Check all programs impacted
- **Area(s) Impacted** – Check all areas impacted

Example – Request Information

Submission Date	10/13/26	**Region**	R5
County	Tulare County	**Submitter Name**	Yolanda Banuelos
Email	sample@Tularecounty.gov	**Phone**	(555) 555-0100
Enhancement Title	**Improved Visibility of Recent Case Activity and Outstanding Work**		

Program(s) Impacted (check all that apply)

☐ Adoptive Services	☐ ARC	☒ CalFresh
☐ Cal-Learn	☐ CalWORKs/RCA	☐ CAPI
☐ Child Care	☐ CMSP	☐ Foster Care
☐ GA/GR	☐ WTW	☐ START
☐ Kin-GAP	☐ Medi-Cal/RMA	☐ Other (specify below)

Area(s) Impacted (check all that apply)

☐ Call Center	☐ Case Assignment	☐ Central Print
☐ Client Correspondence	☒ Eligibility	☐ Fiscal/Collections
☐ Hearings	☐ Imaging	☐ Lobby Management
☐ Reports/Dashboards	☐ Resource Data Bank	☐ Schedule Appointment
☐ Security	☐ Self Service Portal	☐ Online
☐ Special Investigation	☒ Task Management	☐ Time Limits
☐ Training	☐ Interfaces (specify below)	☐ Other (specify below)

Section 2 – Business Need

Describe the current state, why the change is needed, and any current workaround.



Step 1: Describe Current State

In the Current State section:

- Describe the current process or functionality and how it works today.
- Identify the specific challenge, issue, or limitation being experienced.
- Describe the frequency of the issue and the circumstances under which it occurs.
- Provide specific examples when available, including relevant pages, steps, or workflow involved.

Example - Current State

Eligibility staff routinely review recent case activity and outstanding work before determining the appropriate next action on a case.

The information needed to understand what has recently occurred and what remains outstanding may require staff to review multiple areas of CalSAWS and piece the information together manually.

This occurs during normal daily case processing and is especially noticeable when a case has had several recent actions, has been reassigned, or is being reviewed by a worker who did not complete the prior activity.

Example: A worker receives a task on a case recently handled by another staff member. Before acting on the task, the worker reviews recent activity and outstanding work in multiple areas to understand what has already been completed and what action is still needed.

Step 2: Describe Why the Change is Needed

- Describe why enhancement is needed.
- Identify the operational challenge, limitation or county pain point the enhancement would address.
- Describe the impact of the current process or functionality on county operations, including what may continue or occur if the issue is not addressed.

Example – Why the Change is Needed

Workers need a more efficient way to understand relevant recent case activity and outstanding work before taking the next action.

The current process adds navigation and manual review to routine case processing and can result in different levels of effort depending on the worker's familiarity with the case.

If the issue is not addressed, staff will continue to manually reconstruct recent case activity, which can contribute to additional processing time, rework, or relevant activity being overlooked.



Steps 3: Describe Current Workaround

- Describe any manual process or workaround currently being used to address the issue.
- If no workaround exists, indicate "None."

Example - Current Workaround

Staff manually navigate between the applicable areas of CalSAWS, compare recent activity and outstanding items, and determine what has already occurred before proceeding.

The workaround is functional but requires repeated navigation and manual interpretation for each applicable case.

Tip: The Current Workaround should describe what staff do today. Do not use this field to describe the desired solution.

Section 3 – Desired Outcome

Describe the outcome desired with implementation of the CER.

- Describe the capability, enhancement, or improvement being requested.
- Explain what the requested change should make possible or improve.
- Focus on the desired business outcome rather than prescribing a specific design or technical

Example – Desired Outcome

Provide functionality that allows staff to more efficiently identify and review relevant recent case activity and outstanding work needed to determine the appropriate next action.

The capability should reduce unnecessary navigation and manual reconstruction of case activity while preserving the context staff need to support accurate case processing.

The desired outcome is a more efficient and consistent review process.



Section 4 – Expected Benefits/Business Driver

Select the primary business driver(s) that best describes the expected benefit of the request, then describes the expected benefits.

Step 1: Select Primary Business Driver(s)

Example – Primary Business Driver(s)
☒ Supports Day-to-Day Operations ☒ Enhances User Experience ☒ Improves Productivity ☐ Improves System Performance ☐ Complies with Policy and Regulations ☐ Other

Policy/ Regulatory Reference (if applicable)

If Compliance with Policy and Regulations is selected, identify the applicable policy or regulatory guidance, include the reference number/title, and briefly describe how the request relates to the guidance.

Tip: The sample request does not select Compliance with Policy and Regulations, so no policy/regulatory reference is required.

Step 2: Describe the Expected Benefits

- Explain how the requested enhancement outcome would improve county operations and connect to the business driver(s) selected above.
- Include measurable or observable benefits when known.

Example - Expected Benefits
Supports Day-to-Day Operations: Gives eligibility staff a more efficient way to understand recent case activity and outstanding work before taking action. Enhances User Experience: Reduces unnecessary navigation and makes it easier for staff who are unfamiliar with a case to understand its recent activity. Improves Productivity: Reduces manual review and repeated navigation during routine case processing. Observable benefits may include fewer steps needed to understand recent case activity and less time spent reconstructing what has already occurred.

Section 5 – Additional Information

Provide any known County collaboration and other information that may assist in understanding or evaluating the request. These fields are optional.



Step 1: Describe County Collaboration Efforts (Optional)

In the County Collaboration section, identify if other counties have identified similar needs and list any counties and known shared need or coordination. The following is an example of a completed County Collaboration section:

Example -County Collaboration (Optional)
Have other counties identified similar needs? Yes No Unknown
If yes, list the county/county names and briefly describe any known shared need or coordination: Unknown. Sample County has not coordinated this request with other counties at the time of submission.

Step 2: Provide Additional Considerations (Optional)

Include any other information that may assist in evaluating the request, such as timing considerations, operational impacts, related initiatives, supporting examples, or other relevant context.

Example Additional Considerations
This request is intended to improve routine case review and does not depend on a specific release date or related initiative. The county's primary concern is reducing the amount of manual navigation needed to understand recent case activity while maintaining the information necessary for accurate processing.

CalSAWS Use Only

Do not complete the CalSAWS Use Only section. It will be completed by internal CalSAWS teams.

Submitting the Completed CER

To submit a completed CER, the County's PPOC will send the completed CER request to CER@CalSAWS.org and cc their Regional Manager(s).

The blank CER Form and this Process Guide can be found at:

[redacted]