

# CalSAWS | Chronicle

California Statewide Automated Welfare System | Contra Costa County Employment & Human Services

May 2021



## Imaging Walk Through

By Terri Rose, Information Systems Analyst & CalSAWS BPR Lead

You can now get a video walkthrough of the CalSAWS imaging process, and see how CalSAWS will give users the ability to virtually print, and drag and drop files as they do today in Compass Pilot.

One imaging process highlight is that you can launch the Imaging Solution while in the CalSAWS Case Summary Screen. You will be able to view documents relating to the customer by clicking on the “Images” button, as well as scanning directly by clicking on the “Capture” button

as opposed to going to a separate application as we do today.

The eICT process will become much simpler once all counties have migrated to CalSAWS. Documents can be copied between counties



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## Did You Know?

- **There is no CWIN in CalSAWS** – When a person is added to CalSAWS, after normal MEDS clearances have been performed, the user will be asked to if they want to add a CIN but no CWIN will be generated. The CWIN is CalWIN, not CalSAWS.
- **PCN will change to a Worker ID of 10 digits!**
  - > Each digit has a meaning:
    - First (2) = County Code
    - Second (2) = Department Identifier Code
    - Third (2) = Office Identifier Code
    - Fourth (2) = Unit Identifier Code
    - Fifth (2) = Worker Identifier Code

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# CalSAWS Training Update

By Tracey Lewis, Interim Staff Development Division Manager

Employees from WFS, Staff Development, and our CalSAWS team joined with CalWIN counties

across California to watch our first demonstration of the CalSAWS system on Wednesday, April 21st. We saw the difference between how certain processes are done in CalWIN and how those same processes will be completed in CalSAWS. The response from staff was resoundingly enthusiastic and we are confident they will embrace this new system. Staff Development trainers are now venturing into the “CalSAWS Sandbox” to become familiar with the nuances of the system. We have added a CalSAWS icon to the SMART system and over the next weeks and months, we will be placing CalSAWS training materials there for staff to review and complete. Just click on the CalSAWS icon and check it out!

Eventually there will be a single source location for all CalSAWS documents with a link directly to SMART for training-related materials.

The screenshot shows the SMART Staff Development portal. At the top, there's a navigation bar with links: Home, My Learning, My Resources, My Team, Reports. Below that, a welcome message for Tracey. A 'Quick Links' section includes links for eXemplar Reports Training, App/Req, Clearances, and DERs e-Learnings, and buttons for Q3 Training Handout and Ecotime E-Learning. A 'SMART Featured Trainings' section lists various training options. At the bottom, two icons are shown: CalSAWS (circled in red) and SMART Reels. The CalSAWS icon has the tagline 'One Team, One System, One Goal'.

## Click on the CalSAWS Icon and this is what you will see...

The screenshot shows the CalSAWS landing page. It features a header with the slogan 'CalSAWS -- One Team, One System, One Goal'. A welcome message says 'We are glad you are here!' followed by a paragraph about the system's implementation in June 2019. Below that, it mentions EHSB Staff Development support. A note at the bottom states: '\* An asterisk below designates materials that will request a download to your computer.' The page is divided into three main sections: 'CalSAWS Training' (green background) with a link to 'CalWIN to CalSAWS Workshop Overview \*', 'CalSAWS Help' (yellow background) with a link to 'CalSAWS Awareness and Learning Toolkit April 2021 \*', and 'CalSAWS Reference Materials' (grey background) with a link to 'CalSAWS Glossary \*'. To the right of the text is a large image of yellow sunflowers.



## What's the Word?

A few new terms that will replace CalWIN terminology:

- **Member (MEM)** – An applicant who has applied for or is eligible for assistance
- **Financially Responsible Excluded (FRE)** – An FRE person is one who is not eligible for assistance but is financially responsible to the program and is excluded from the unit size. (e.g., CW or CF sanction person, CF undocumented individual...)
- **Financially Responsible Included (FRI)** – Individual who is not eligible for assistance but is financially responsible to the program and is included in the unit size. (e.g., CW or MC unaided relative, CW undocumented individual...)
- **Unaided Person (UP)** – Someone who is not receiving aid in the program and is not financially responsible. (e.g., Responsible Relative)

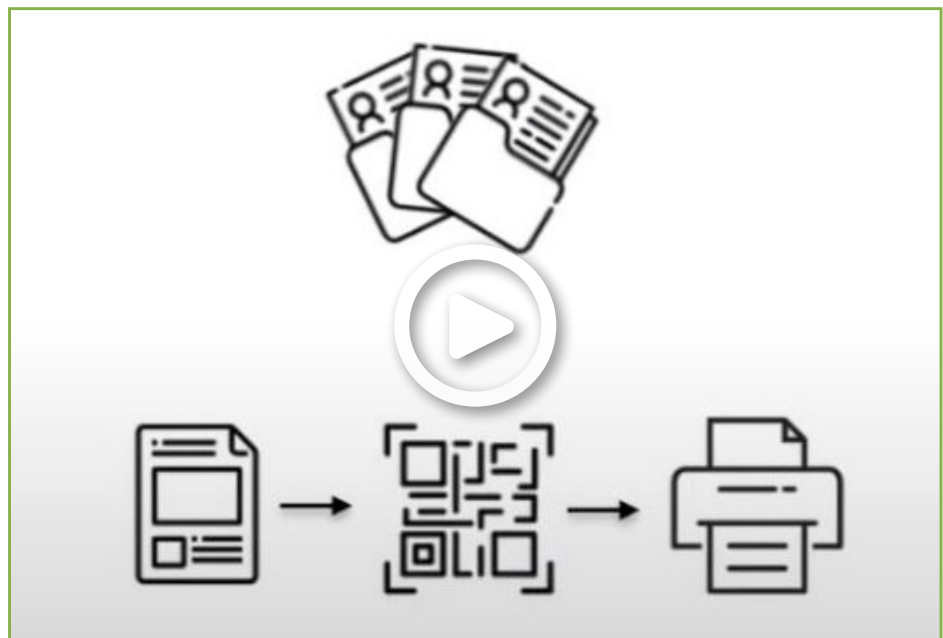
Source: CalSAWS job aid for Eligibility Role Assignments for individuals

## Imaging Walk Through

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eliminating the need to export and import documents through different systems. Barcodes will be applied to all system-generated documents allowing us to automate more of the indexing process. Documents not created from the system will go through the Optical Character Recognition (OCR) process to validate them for final processing.

CalSAWS' 8-minute [Imaging Demo Video](#) gives you a virtual walkthrough of the imaging process. Click on the photo to get a sneak peek.



## Data Retention Guidelines

CalWIN cases will be converted based on the Data Retention Policy. In a recent CalWIN Release, a new data field was added in CalWIN to show whether the case or individual will be retained or not. All pending and active cases for all programs, as well as all Foster Care, Kin-Gap and Adoptions Assistance cases, regardless of case status, will be converted. In addition, any closed cases that meet any of the following criteria will be converted:

Closed within the last six years

- **Those with outstanding benefit recovery claims**
- **Special Investigation, litigation cases**
- **In Audit**
- **Intentional Program Violation cases**

Workers can use the Collect CalSAWS Exclusion Detail page in CalWIN for cases that need to be kept. These are cases that would otherwise not have been converted or excluded from the Data Retention criteria, such as ongoing litigation.



### Functionality Highlight By Shari Garrity

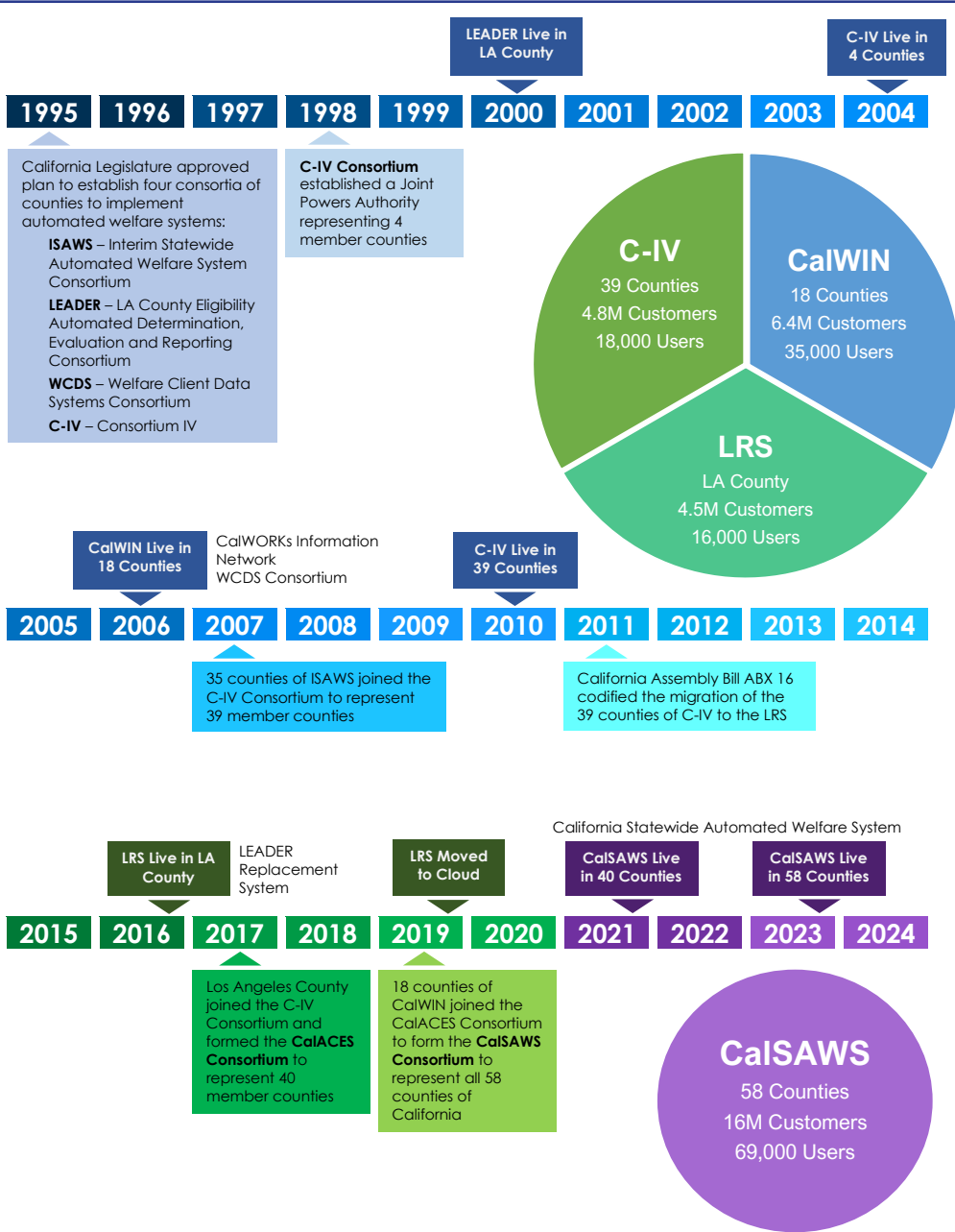
It is much easier to enter relationships and immunizations using the **Relationship Detail** and **Immunization Status List** pages in CalSAWS. You can see a breakdown of both these functionalities on “[Insights to CalSAWS](#)” (see items 14 & 15) on the new CalSAWS Intranet page.

### Did You Know? Continued from page 1

- **There are no UEM’s in CalSAWS** – The system is designed with the functionality to know when to use the data.
- **Imaging & task management will be integrated in CalSAWS.** This means only using one system. For ease:
  - > Users can access images in CalSAWS directly when in a case record.
  - > Tasks are available from many windows within the CalSAWS core.

# SAWS Journey

To see how we arrived at this point along the 25-plus year journey of automated welfare systems, take a look at this timeline marking key dates for the various California systems.



Source: CalSAWS Executive Overview (Joint Powers Authority)

