Update 2011-10: Common Place Handbook
Changes to Creating a User-to-User Alert in a CCS Intake Office
(Obsolete)

**Background**
Currently, intake eligibility staff are instructed to create a user-to-user alert in CalWIN to a designated caseload when follow-up action is required on a case.

**Changes**
Instead of a user-to-user alert, eligibility staff will now need to create a case alert and enter a key identifier in the subject line when follow-up action is required on a case.

The CCS workflow narrative is revised to reflect these changes and is retitled, “Creating a Case Alert.”

**Creating a Case Alert**
When sending an alert to a CCS case, Eligibility Workers (EWs) will enter the information in the Send User Alert window in the following sequential order to ensure that cases needing appropriate follow-up action are correctly identified in the “CCS - Daily Case Alert Unresolved” (DOPS7188) report:

- Select Case in the “Sent to” group box
- Case Number in the Case # field
- Date the alert is created in the Date field
- Due date in the Due Date field
- Key Identifier (i.e. CCAL, CCML) in the Subject field
- A brief description of the pending follow-up item in the Detail field.

**Key Identifier**
The key identifier is an acronym that identifies the type of case that requires follow-up action. It is imperative that the Subject field of the alert begin with the appropriate key identifier. These identifiers are
necessary so that a listing of the alerts can be generated and distributed appropriately. If not entered correctly, it may prevent the alert from being generated in the report.

The following key identifiers are used to distinguish cases that require follow-up action:

<table>
<thead>
<tr>
<th>Key Identifier</th>
<th>Case type</th>
</tr>
</thead>
<tbody>
<tr>
<td>CCAL</td>
<td>Generic intake cases, non-specialized Medi-Cal applications and verifications for Craig vs. Bonta cases.</td>
</tr>
<tr>
<td>CCML</td>
<td>Specialized Medi-Cal intake cases that require follow-up action. This key identifier will only be used by VMC staff.</td>
</tr>
<tr>
<td>CCGL</td>
<td>Intake General Assistance (GA) cases.</td>
</tr>
<tr>
<td>CCNL</td>
<td>Continuing GA cases.</td>
</tr>
<tr>
<td>CCCL</td>
<td>CalWorks continuing cases.</td>
</tr>
</tbody>
</table>

For more specific information regarding creating CCS Alerts, refer to the CCS Narrative, “Creating a Case Alert”.

http://intranet.ssa.co.santa-clara.ca.us/department/ccs/documents/ccs_workflows_gi_es_17.pdf

**Implementation**

These changes are effective July 5, 2011.

**Offices Affected**

This information applies to all CCS offices.

**EW Supervisor**

EW Supervisors must review this information with their staff no later than September 16, 2011.

UMESH POL, DIRECTOR  
CalWIN Division

KATHERINE BUCKOVETZ, DIRECTOR  
Department of Employment and Benefit Services

Contact Person(s): Olivia Cuevas, Application and Decision Support Specialist, (408) 491-6700.