

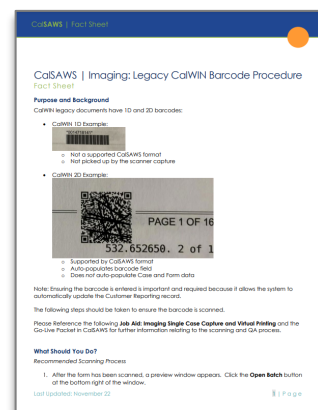
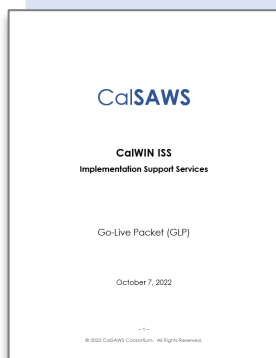
# CalSAWS

## Survival Kit

Use this handy guide to start “Packing for Go-Live” and better understand all your CalSAWS resources.

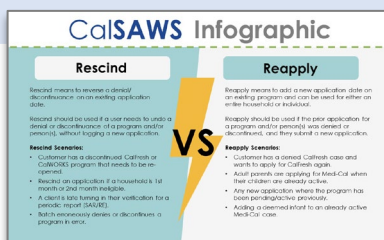
### Go-Live Packet

Your Go-Live Packet provides information for you to self-serve after Go-Live as much as possible, and to help you find additional information. There are three key sections: *What You Need to Do, What You Need to Know, and Where to Find Help.*



### Infographics & Newsletters

Before migration, review your Infographics and CalSAWS Scoop newsletters to deepen your project knowledge! Be sure to see the infographic: “Rescind Vs. Reapply”.

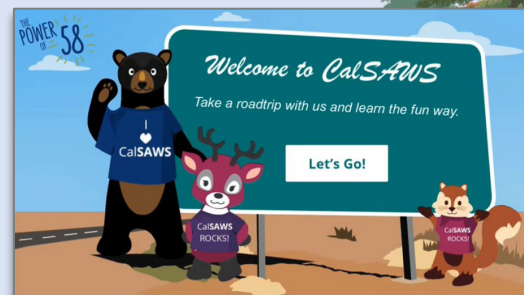


### Fact Sheets

A Fact Sheet document describes various functions of CalSAWS, with instructions for completing work in CalSAWS. Fact Sheets will continue to be developed after Go-Live to support County needs as they arise. Stay on the look out for new Fact Sheets as they're distributed!

### LMS & WBTs

The Learning Management System (LMS) and Web-Based Training (WBT) modules will also be available after Go-Live! Even after you complete training, we recommend reviewing WBTs as needed to reinforce your knowledge as you begin to work in CalSAWS. You can self-enroll in any WBTs available within the LMS by searching the catalog.



### CalSAWS Resources

Make sure you know where to access all your County's CalSAWS materials and resources. If in doubt reach out – to your local Implementation Point of Contact and/or Change Network Champion!

# CalSAWS

## Yellow Banner

### Yellow Banner Cases

If your job includes running EDBC, you may open a case and see a yellow banner like this:

► **Full Case Review is required before EDBC is run and authorized. Please refer to the Manual Case Review Job Aid for Instructions on how to proceed. Programs Affected: CalFresh**

Yellow Banner cases should take priority to clean up after conversion to CalSAWS.

### Best Practice for Yellow Banner Case Review

The yellow banner tells you there is a mismatch in the eligibility determination between CalSAWS and CalWIN. If the EDBC's don't match, the Batch EDBC cannot be saved.

Cleaning up these cases and resolving the mismatches is the first priority – best practice is to do a full case review, including a look at the household's composition, e.g., who is in the home, who is supposed to be in the home, who is requesting aid, who is mandatory to include, the household tax filing status, who is working, verified income, and citizenship status of members.



**A collection of Yellow Banner Case Review Guides is available for working on a variety of scenarios:**

**Aid Code Mismatch**

**Cash Program Not Authorized**

**Full Case Review**

**Prior Or Current EDBC Not Found**

**Program Person Status Mismatch**

**Recoupment Mismatch**

**Benefit Amount Mismatch**

**Exclusion/Exception**

**MAGI Determination Pending**

**Program Person Role Mismatch**

**Program Discontinued**

# CalSAWS

## Terminology

## New and Changed Terms

Here are some terms you should know as you get ready for CalSAWS:

<b>Change Reason (replaces UEM)</b>	You can set a New Change Reason and New Reported Date in data collection pages (except Medi-Cal or CWS programs) – UEM errors are now a thing of the past!
<b>Child Welfare Services</b>	A new umbrella term for Foster Care, ARC, AAP, and Kin-GAP
<b>CIN</b>	The Client Index Number is a person's unique identifier, universal for all California Counties (CWIN is now obsolete)
<b>Come-Up Month</b>	New term that replaces 'Future Month'
<b>Distributed Documents</b>	Replaces 'Printed Correspondence'
<b>eTools</b>	An area in CalSAWS that is similar to the 'External Referrals Window' in CalWIN
<b>High Dated EDBC</b>	An EDBC record with a Begin Date but no End Date, so benefits continue at the same amount – equivalent to an 'Open' or 'Active' record in CalWIN
<b>Routine, Rush, or Manual</b>	There are 3 levels of 'Immediacy' in CalSAWS – Routine goes out in overnight batch, Rush is for either a check printed in the office or an immediate loading of funds on an EBT card, and Manual is a way to record an issuance or payment made outside CalSAWS
<b>Manual EDBC</b>	A process that replaces NSDI in CalWIN
<b>Journal Entry</b>	Previously called 'Case Comments' in CalWIN
<b>Local or Central Print</b>	Print correspondence locally in the office, or centrally via overnight batch
<b>Person Search</b>	Referred to as 'Inquiry' in CalWIN
<b>Re-Evaluation (RE)</b>	Formerly 'RRR' in CalWIN
<b>Resource Databank (RDB)</b>	A statewide shared database of providers, employers, schools, and Foster Care providers (there is a separate RDB for Foster Care)
<b>Service Arrangement</b>	Formerly called 'Supportive Service' in CalWIN
<b>Template Repository</b>	Stores all templates for manually-generated forms and NOAs
<b>Valuables</b>	Physical items such as bus passes, EBT card stock, check stock, parking passes, gas cards – each County can choose the item categories and types to track in their Valuables Inventory
<b>Warrant</b>	CalSAWS term for 'check'