

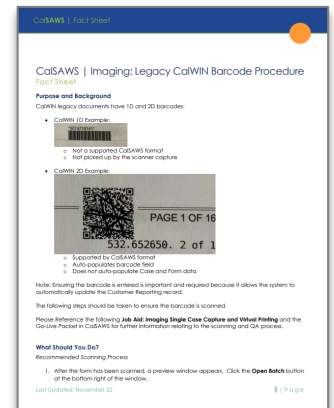
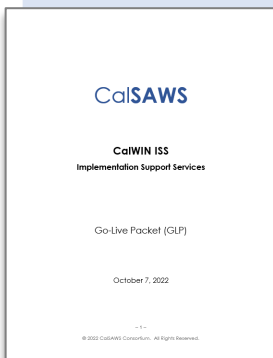
# CalSAWS

## Survival Kit

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

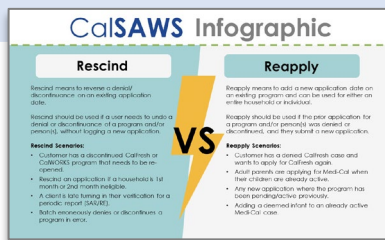
### Go-Live Packet

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”.

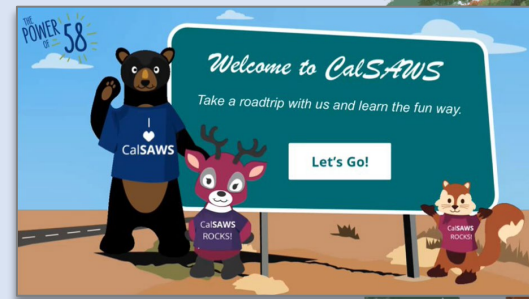


### Fact Sheets

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!

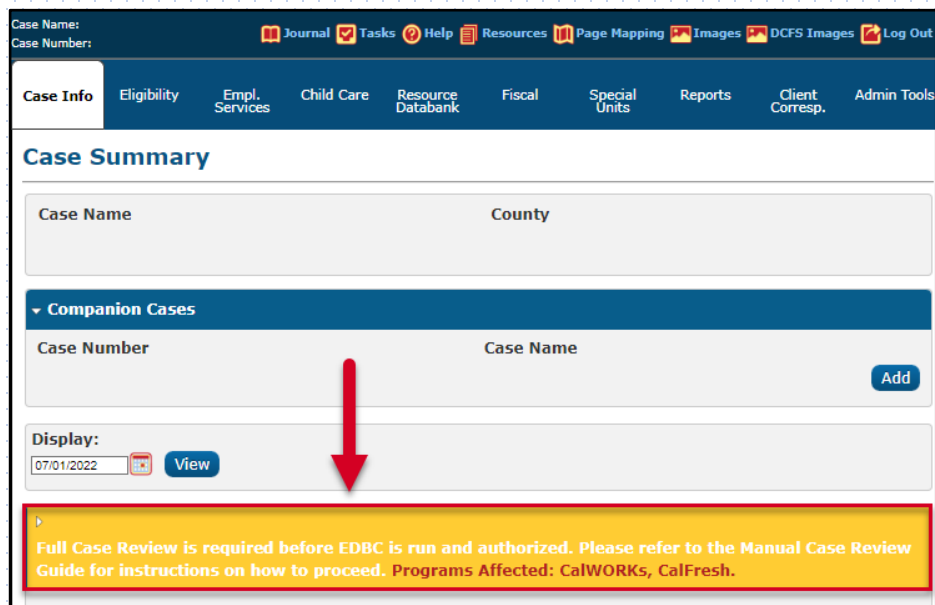
# CalSAWS

## Yellow Banner

Post Go-Live Yellow Banners will appear on some active cases in CalSAWS. Yellow Banners indicate an EDBC Mismatch.

During the conversion from CalWIN to CalSAWS, CalSAWS will run Batch EDBC for all active CalWIN cases. If the EDBC's do **not** match, the case will be flagged with a yellow banner and the Batch EDBC is **not** saved.

Yellow Banners are located on the **Case Summary** page.



The screenshot shows the CalSAWS Case Summary page. At the top, there is a navigation bar with links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a tabbed interface with 'Case Info' selected. The 'Case Summary' section displays fields for Case Name and County. A 'Companion Cases' section below it has a table with columns for Case Number and Case Name, and an 'Add' button. A red arrow points down to a yellow banner at the bottom of the page. The banner contains the text: 'Full Case Review is required before EDBC is run and authorized. Please refer to the Manual Case Review Guide for instructions on how to proceed. Programs Affected: CalWORKs, CalFresh.'



### Best Practices for Yellow Banner Case Review

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.

**Note:** Generally, batch EDBC will not be run on these cases until the worker performs the case review, takes appropriate action, and accepts and saves the EDBC. These cases will be identified via exception reports after each batch job.

# CalSAWS

**Yellow Banner**

## Did you Know?

**1** Benefits for Yellow Banner cases will continue as they were in CalWIN until a worker re-runs EDBC in CalSAWS.

**2** Each Mismatch Reason is assigned a priority of 1, 2, or 3. Cases labeled with a priority of 1 being the highest priority.

**3** The four highest priority Mismatch Reasons are:

- Cases that resulted in a discontinuance or failure
- Recoupment mismatch
- Person status mismatch
- Case Program not Authorized

**4** Counties will have the ability to track the cases with Yellow Banners using a Reports Dashboard



**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**

If you have any questions about accessing the Yellow Banner Case Review Guides, please reach out to your County's Primary Point of Contact (PPOC) or Implementation Point of Contact (IPOC).



# 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 certain NSDI transactions 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'