

# Correcting Cardholder Access using ebtEDGE webADMIN

## 1. Introduction

As part of the effort to replace old EBT cards with new EBT cards with a Card Validation Value (CVV) security feature, FIS and the eligibility system consortia compared the cardholder access recorded in the eligibility system to the cardholder access recorded in the EBT system for selected cases that were issued new CVV enabled EBT cards.

Using data provided by the eligibility systems, FIS identified 532 cardholders where the cardholder access in the EBT system did not match the cardholder access in the eligibility system. This document provides guidance and step-by-step instructions to correct the cardholder access in the EBT system using ebtEDGE webADMIN,

## 2. Account Cardholder PAN Mismatch List

The spreadsheet provided by FIS identifies the State Unique Identifier (SUID) and Primary/Alternate Indicator (Primary / Alt Ind) of each impacted cardholder along with the Consortia Access Type and FIS Access Type. The last ten digits of the new CVV card number (PAN) and the replaced non-CVV PAN are also provided for reference only.

The Access Type code identifies the cardholder access in the consortia eligibility system and the FIS EBT system. The table below identifies the EBT system Food and Cash account access for each Access Type code.

| Access Type Code | Description        | ebtEDGE Benefit Access |           |
|------------------|--------------------|------------------------|-----------|
|                  |                    | Food                   | Cash      |
| B                | Both Food and Cash | Access                 | Access    |
| F                | Food Only          | Access                 | No Access |
| C                | Cash Only          | No Access              | Access    |
| N                | None               | No Access              | No Access |

## 3. Required ebtEDGE User Roles

An ebtEDGE user must have the following roles to view and update cardholder access using webADMIN:

- inqCaseCardholderBenefit – required to search and view case/cardholder data.
- updCardholderAddUpdate – required to change the cardholder access

If an ebtEDGE user cannot access the Client Search or the Update buttons on the Client page is disabled, please contact your EBT Zone Administrator to have the roles updated. For additional assistance open a ticket or call FIS State Support Services at (800) 848-6960.

### 4. Step-by-Step Instructions to Update Cardholder Access

- 1. Open *webADMIN* to display the page shown below.

ebtedge.com Back to Agency Portal

**FIS ebtEDGE<sup>SM</sup> Agency**

Home Services Reports Documentation Training News

webADMIN:- Currently viewing: CALIFORNIA Tuesday, February 1, 2022  
Client / Transaction Search [Add SUID](#) [Merchant Search](#) [Help](#)

**Client Search** OR [Transaction Search](#)

Enter single search criteria.

Card #: 507719 [ ] Last Name: [ ] (2 character min)  
SUID: [ ]  Exact Last Name Match  
Account #: [ ] First Name: [ ] (1 character min)  
Optional ID: [ ]  Exact First Name Match  
SSN: [ ] (Do not include dashes.)  
Auth #: [ ] [ Search ] [ Clear ]

**Transaction Search** OR [Client Search](#)

Step 1: Enter single search criteria. Step 2: Refine search filters.

Card #: 507719 [ ] Date Range: 1 Month  
SUID: [ ] Start Date/Time: 01 / 02 / 2022 (MM/DD/YYYY) 00:00 (HH:MM)  
FNS #: [ ] End Date/Time: 02 / 01 / 2022 (MM/DD/YYYY) 23:59 (HH:MM)  
Store #: [ ] Results by Date: Descending  
Account #: [ ] Transaction Category: All  
Auth #: [ ] Program: All  
Transaction Type: All [ Search ] [ Clear ]

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#### webADMIN Client/Transaction Search

2. Enter the SUID from the spreadsheet into the SUID field in the Client Search section of the *Client/Transaction Search* page.

**Client Search** ? OR [Transaction Search](#)

Enter single search criteria.

Card # : 507719

SUID:

Account # :

Optional ID:

SSN:  (Do not include dashes.)

Auth # :

Last Name:  (2 character min)

Exact Last Name Match

First Name:  (1 character min)

Exact First Name Match

### Client Search by SUID

3. Click the **Search** button.

**Note:** If you entered a wrong number, click **Clear** to start over.

4. If there are alternate cardholder(s) on the case, the page below will list the primary and alternate cardholder(s).

**SUID/Client List** ? [Back to Results](#)

Account # : 123456789123 Account Status: ACTIVE [Add SUID](#)

| Card #                      | Access       | Available | SUID                          | Agency | SUID Status |
|-----------------------------|--------------|-----------|-------------------------------|--------|-------------|
| Client Type: 01 - PRIMARY   |              |           |                               |        |             |
| 507719 0000001234           | Cash: Access | 68.75     | <a href="#">58SUID1239999</a> | CAEBT  | ACTIVE      |
| Name: SMITH, MARY           | FS: Access   | 28.37     |                               |        |             |
| Client Status: ACTIVE       |              |           |                               |        |             |
| Client Type: 02 - ALTERNATE |              |           |                               |        |             |
| 507719 0000001234           | Cash: Access | 68.75     | <a href="#">58SUID1239999</a> | CAEBT  | ACTIVE      |
| Name: SMITH, WENDELL        | FS: Access   | 28.37     |                               |        |             |
| Client Status: ACTIVE       |              |           |                               |        |             |

### SUID/Client List showing Alternate Client

5. Click on the SUID link for the primary or alternate cardholder. The SUID Information page's **Case** tab displays for the SUID number

provided, as shown below. If there are no alternate cardholders on the case, this page will be displayed after clicking SEARCH in step 3.

| SUID Information ? |                 | <a href="#">Back to Case / Client List</a> | <input type="button" value="Refresh"/> |
|--------------------|-----------------|--|--|
| Account # :        | 123456789123    | Name:                                      | SMITH , MARY                           |
| Agency:            | CAEBT           | Client Status:                             | ACTIVE                                 |
| SUID:              | 58STATEABCD9999 | Card # :                                   | 507719 0002000517                      |
| Client Type:       | 01 - PRIMARY    |  |  |
|                    |                 | Access                                     | Available Acct Bal                     |
|                    |                 | Cash: Access                               | 68.75 138.75                           |
|                    |                 | FS: Access                                 | 28.37 28.37                            |

  

| Case   | Client   | Card   | Benefit   |
|--|--|--|---|
| <a href="#">Corrections</a> <a href="#">Repayments</a> |  |  |   |
| SUID Information ?                                     |  |  |   |
| Creation Date:   | 04/25/20XX                                       | SUID Status:   | ACTIVE <input type="button" value="Tran Search this SUID"/> |
| Cash Distribution Method:                              | PLASTIC  | Agency:  | CAEBT   |
| SUID Type:   | EBT  | Case Area ID:  | 58 - YUBA   |
| Local Office Code:                                     | 135  | Last Benefit Added Date: (Food) 04/30/20XX (Cash) 04/28/20XX |   |
| Cash Status:   | ACTIVE <input type="button" value="Reactivate"/> | Status Chg Date:   | 01/01/0001 Last Used Date: 05/01/20XX                       |
| Food Status:   | ACTIVE <input type="button" value="Reactivate"/> | Status Chg Date:   | 01/01/0001 Last Used Date: 05/02/20XX                       |
| <input type="button" value="Update"/>                  |  |  |   |

**Case Information – Case Tab**

6. From the *SUID Information* page, open the **Client** tab.

| Case                        | Client                                   | Card   | Benefit                                |
|-----------------------------|--|--|--|
| <a href="#">Add Client</a>  |  | <a href="#">Corrections</a> <a href="#">Repayments</a> |  |
| Client Information ?        |  |  |  |
| *First Name: MARY           | Date of Birth: XX / XX / 1950            | Middle Name:   | Confirm Date of Birth: / /             |
| *Last Name: SMITH           | *SSN: XXXXX6789 (Do not include dashes.) | *Address 1: 20 MAPLE AVENUE                            | *Confirm SSN: (Do not include dashes.) |
| Address 2:                  | Home Phone Number: - -                   | Address 3:   | Ph Nbr Chg Count: 0 01/01/0001 00:00   |
| *City: CITYVILLE            | Security Code:                           | *State: CA   | *Client Status: Active                 |
| *ZIP Code: 95901 -          | *Benefit Access: 01 - PRIMARY            | In Care Of:  | Client Type: 01 - PRIMARY              |
| Optional ID:                | *Cash: Access                            | Addr Chg Count: 0                                      | *FS: Access                            |
| Last Updated Src:           | *Restaurant Meals: No                    | Last Updated By: CAUSER                                |  |
| ID Type: NONE               |  | Last Updated TS: 01/01/0001 00:00                      |  |
| *Language Code: ENGLISH     |  |  |  |
| Updated By: CAUSER          | Last Updated: 05/01/20XX 15:16           | <input type="button" value="Update"/>                  |  |
| <a href="#">Back To Top</a> |  |  |  |

**SUID Information – Client Tab**

### 7. Change the Cash and FS access to match the information in the spreadsheet.

Case | **Client** | Card | Benefit

[Add Client](#) [Corrections](#) [Repayments](#)

Client Information ?

|  |  |
|--|--|
| *First Name: TEST                                  | Deceased Date:                           |
| Middle Name:                                       | Date of Birth: XX / XX / 2001            |
| *Last Name: ALTERNATE                              | Confirm Date of Birth: / /               |
|  | *SSN: XXXXX0000 (Do not include dashes.) |
| *Address 1: 123                                    | *Confirm SSN: (Do not include dashes.)   |
| Address 2:   | Home Phone Number: - -                   |
| Address 3:   | Ph Nbr Chg Count: 0 01/01/0001 00:00     |
| *City: ABC   | Security Code:                           |
| *State: CA * ZIP Code: 12345 -                     | *Client Status: Active                   |
| In Care Of:  | Benefit Access:                          |
|  | Client Type: 02 - ALTERNATE              |
| Optional ID:                                       | Select the appropriate benefit access.   |
| Addr Chg Count: 0 Last Updated By: 37TTER01        | *Cash: No Access                         |
| Last Updated Src: Last Updated TS:01/01/0001 00:00 | *FS: Access                              |
| ID Type: NONE                                      | *Restaurant Meals: No                    |
| *Language Code: ENGLISH                            |  |

Updated By: 37TTER01 Last Updated: 01/19/2021 14:30

8. Click the **Update** button. Once the Update button is clicked, a message displays confirming that the information was successfully updated in the database.

webADMIN:- Currently viewing: CALIFORNIA  
[Client / Transaction Search](#) [Add SUID](#) [Merchant Search](#) [Help](#)

 Client updated successfully.

**SUID Information** [Back to Case / Client List](#) Refresh

|              |                |                |                   |                      |           |           |
|--------------|----------------|----------------|-------------------|----------------------|-----------|-----------|
| Account # :  | 12000097127027 | Name:          | ALTERNATE , TEST  | Access               | Available | Acct Bal  |
| Agency:      | CAEBT          | Client Status: | ACTIVE            | <b>DORMANT</b> Cash: | No Access | 0.00 0.99 |
| SUID:        | 37TESTCARD1    | Card # :       | 507719 0002356323 | FS:                  | No Access | 0.00 0.00 |
| Client Type: | 02 - ALTERNATE |                |                   |                      |           |           |

Case **Client** Card Benefit

[Add Client](#)

[Corrections](#) [Repayments](#)

Client Information

|   |   |
|---|---|
| *First Name: <input type="text" value="TEST"/>  | Deceased Date:  |
| Middle Name: <input type="text"/>   | Date of Birth: <input type="text" value="XX"/> / <input type="text" value="XX"/> / <input type="text" value="2001"/>        |
| *Last Name: <input type="text" value="ALTERNATE"/>  | Confirm Date of Birth: <input type="text"/> / <input type="text"/> / <input type="text"/>                                   |
| *Address 1: <input type="text" value="123"/>  | *SSN: <input type="text" value="XXXXX0000"/> (Do not include dashes.)   |
| Address 2: <input type="text"/>   | *Confirm SSN: <input type="text"/> (Do not include dashes.)   |
| Address 3: <input type="text"/>   | Home Phone Number: <input type="text"/> - <input type="text"/> - <input type="text"/>                                       |
| *City: <input type="text" value="ABC"/>   | Ph Nbr Chg Count: <input type="text" value="0"/> <input type="text" value="01/01/0001"/> <input type="text" value="00:00"/> |
| *State: <input type="text" value="CA"/> <input type="text" value="CA"/> * ZIP Code: <input type="text" value="12345"/> - <input type="text"/> | Security Code: <input type="text"/>   |
| In Care Of: <input type="text"/>  | *Client Status: <input type="text" value="Active"/>   |
| Optional ID: <input type="text"/>   | Benefit Access: <input type="text"/>  |
| Addr Chg Count: 0 Last Updated By: 37TTER01   | Client Type: <input type="text" value="02 - ALTERNATE"/>  |
|   | Select the appropriate benefit access.  |
|   | *Cash: <input type="text" value="No Access"/>   |
|   | *FS: <input type="text" value="Access"/>  |
|   | *Restaurant Meals: <input type="text" value="No"/>  |

9. To perform another search, click the [Client/Transaction Search](#) link to go back to that page, and enter the next SUID.