Aid-Code Mismatch

Priority Level: 3

Programs Impacted: CalFresh, CalWORKs, Foster Care, Medi-Cal

Background

During the conversion cutover from CalWIN to CalSAWS, the system will run a Batch EDBC job for all active CalWIN cases. If the CalSAWS Batch EDBC results match the last saved CalWIN EDBC result, the system considers the benefits a match and saves EDBC. If the CalSAWS Batch EDBC does not match the existing saved CalWIN EDBC, the case will be flagged with a Yellow Banner and the <u>Batch EDBC is not saved</u>.

CalWIN Benefits will roll forward until the next EDBC is run in CalSAWS.

To clear the Yellow Banner, review the Aid-Code mismatch between the last saved and converted CalWIN EDBC. Based on the differences, Users will need to confirm the results, and/or update the data collection records, as applicable. The user will be required to take action based on county policy rules and authorize the EDBC results.

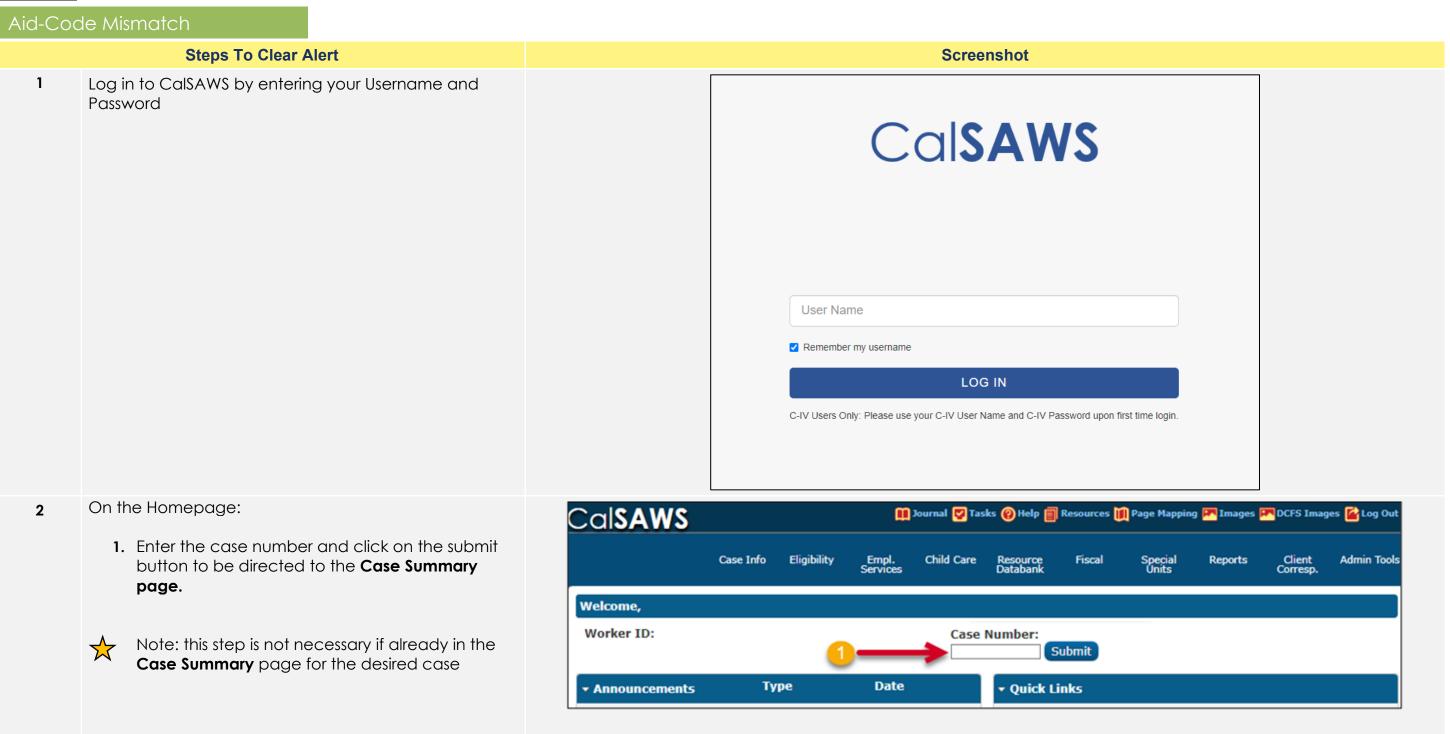
These cases will be identified in the **Conversion EDBC Case Review Report** as follows:

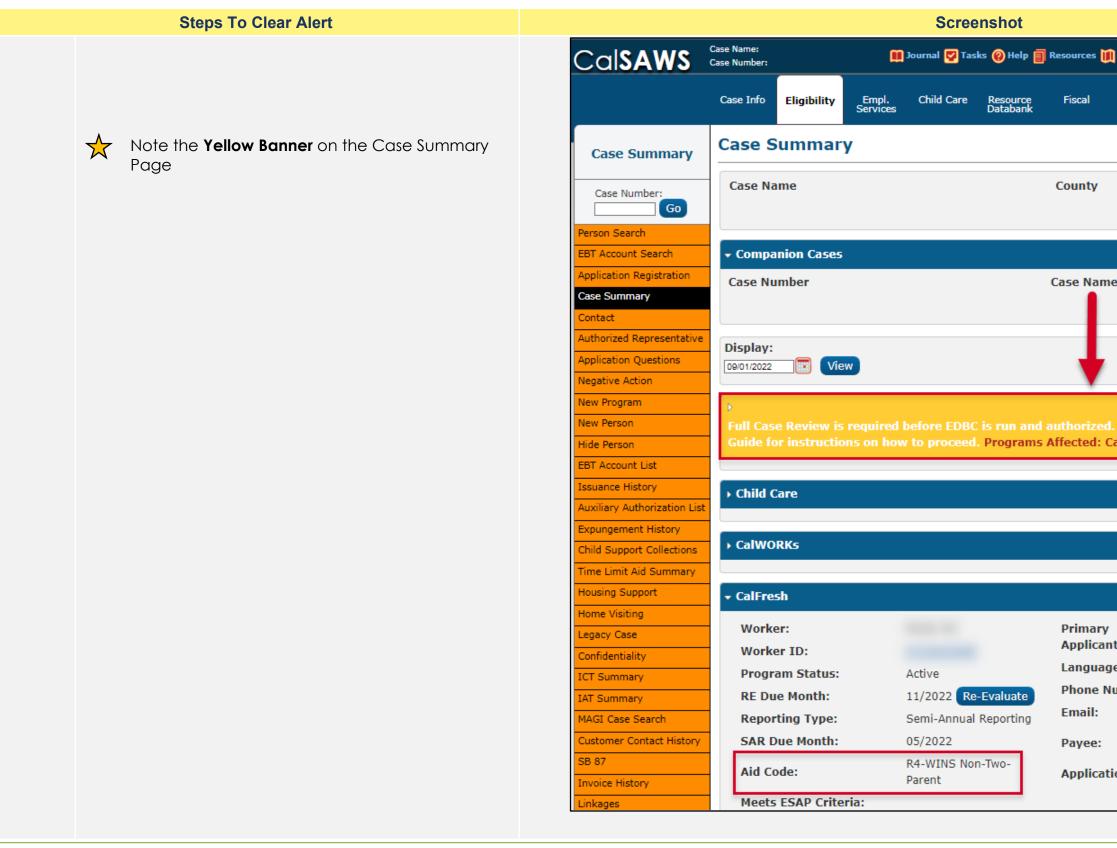
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Users may encounter a CalFresh program moving between Non-Assistance/Mixed Household CalFresh aid codes (for example, "09") and a Public-Assistance CalFresh aid code (30, 32, 33, 3R, 91, 92, etc...). Users may also see a change in CalFresh aid codes in households moving to or from a Work Incentive Nutritional Supplement (WINS) program benefit (R4, R5, R6, R7, R8, R9). For Medi-Cal, any change in Aid-Code for an individual will flag the program/case with a Yellow Banner EDBC Mismatch.

Note: The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided below are intended to direct users to the most commonly impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all of the information is entered as accurately as possible to allow for a correct determination to be made.

Example





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- On the Case Summary Page: 3
 - 1. Click on the **Eligibility** tab on the Global Navigator
 - 2. Click on the **Customer Information** link on the Local Navigator

From the Contact Summary page:

3. Click on the **Run EDBC** tab on the Task Navigator.

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- On the **Run EDBC** page:
 - 1. Select all applicable **Programs**
 - \bigstar

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Note: Program fields must be selected first or the Begin and End Months will show grayed out.

- 2. Populate your **Begin Month** and **End Month** with the next future Month. **Do not use multi-month EDBC to clear a Yellow Banner EDBC Mismatch alert.**
- 3. Click **Run EDBC**
- Ensure all programs on a case are selected when running EDBC as each program can have its own EDBC Mismatch reason. EDBC Mismatch follows program hierarchy and requires all programs be run at the same time to clear all EDBC Mismatch reasons on a case.

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When running EDBC, there are two types of validations; Hard and Soft Validations that a User may experience if eligibility criteria is missing or pending.

When experiencing a **Hard Validation**, EDBC <u>cannot</u> be run without the appropriate updates made to the data collection pages.

When experiencing a **Soft Validation**, EDBC <u>can</u> still be run without making changes to the data collection pages. Follow your county business processes and procedures.



Note: Although a Soft Validation will allow the user to run EBDC and remove the Yellow Banner, the pending verifications may result in a negative case action and/or potential over issuance. Follow your county business processes and procedures.

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5 Compare the Aid-Code mismatch details with the last CalWIN **Conversion** EDBC run.

Staff will need to identify if there are any mismatches in the following Data Collection Pages: income, household size, living expenses, Other Program Assistance (OPA), Noncompliance/Sanctions/Penalties, etc.

Review for any discrepancies within data collection pages that could potentially change the last authorized Benefit Issuance Amount.

In this example, we will review the converted CalFresh Budget by first clicking the **CalFresh link for 02/2022** (circled in yellow). Compare the converted CalFresh aid code against the new CalSAWS Budget by clicking the **CalFresh link for 9/2022 (red arrow)**.

Clicking on the CalFresh hyperlink in the Program column will navigate Users to the CalFresh EDBC Summary page.

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In the example to the right, the converted 2/2022 CalFresh EDBC Summary page displays the CalFresh budget aid code of **R4-WINS Non-Two-Parent**. The new CalSAWS budget on the CalFresh EDBC Summary page for 9/2022 shows a different aid code of **09 – CalFresh**.

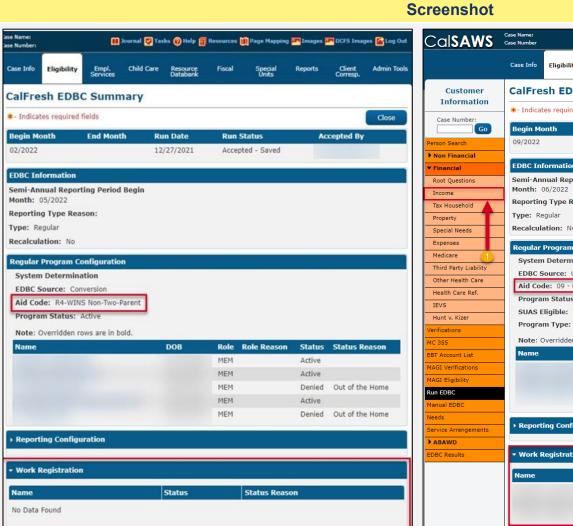
> In the 2/2022 Work Registration block, the CalFresh household members do not show a Work Registration status. Alternatively, the new CalSAWS 9/2022 budget shows an **Exempt** Work Registration status.



Note: If the status in the Work Registration block does not match, Users should review the **Work Registration List** page.

On the CalFresh EDBC Summary page:

1. Click on the Income tab on the Task Navigator. This will navigate Users to the Income List page.



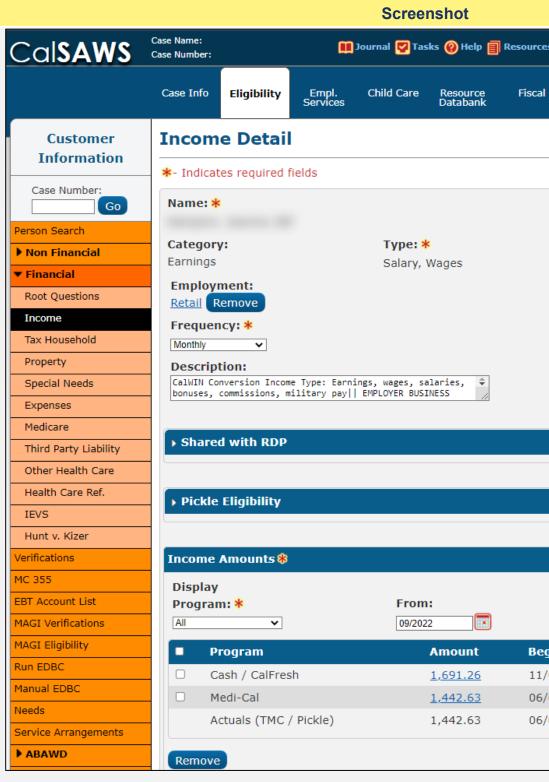
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- 7 On the **Income List** page, review all current income records.
 - 1) Click the **Edit** button for the Category of Earnings income entry.

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On the **Income Detail** page, there are two hyperlinked Amount entries in the Income Amounts section under the Program field, one for Cash / CalFresh and the other for Medi-Cal.

1) Click the **Edit** button on the Cash / CalFresh income record.



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Users should review all listed income amounts for accuracy. Users can select and/or adjust between proxy or actual work hours.

On the Income Amount Detail page:

- 1. Select Actual from the Work Hours drop list and edit the <Number of Hours> in the Work Hours field.
- 2. Enter the appropriate **<Date>** in the **Begin Date** field.
- 3. Enter the appropriate **<Date>** in the **End Date** field, if applicable.



Note: The System prorates the actual hours based on the Begin and End dates entered.

- 4. Select a **<Status>** from the **Verified** drop list.
- 5. Click the **Save and Return** button on the **Income Amount Detail** page.

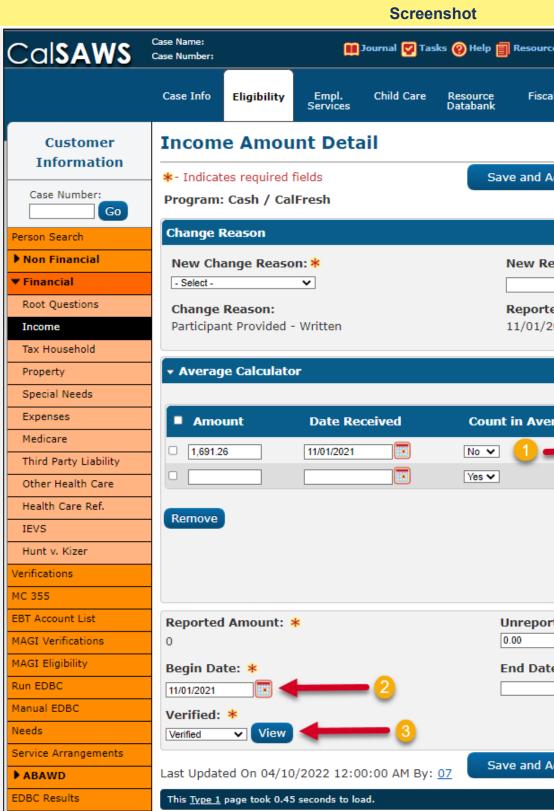
Note: The System uses a value of 0 when calculating the WINS Weekly Hours if you select Actual and enter a value of 0 or no value at all in the Work Hours field.

The System does not automatically default to using the proxy calculation when no selection is made. Once Proxy is selected, the proxy calculation divides the income amount by the State minimum wage plus \$0.50 to determine the WINS Weekly Hours for the income record.



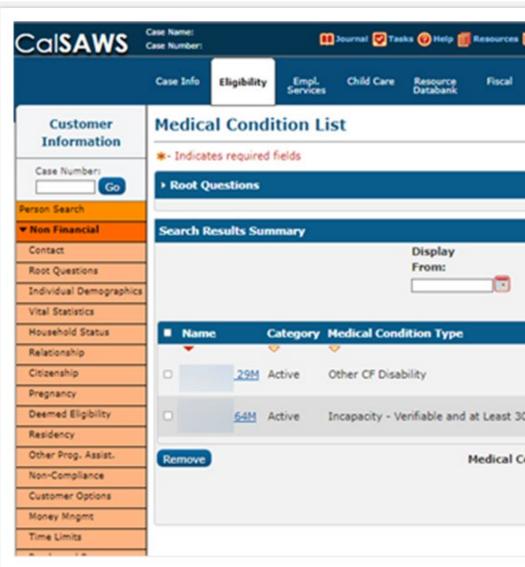
Note: The proxy calculation for the WINS weekly hours must not be used on a regular basis; it should only be used when the actual hours worked information cannot be obtained from the CalFresh household.

Additional WINS information can be found in the **CalSAWS Quick Guide – WINS** in LMS.



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- 8 On the **Medical Condition List** page, review all current medical condition records.
 - 1. Click the **Edit** button for the person record whose Medical Condition Type requires review.



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Users should review all listed medical condition records for accuracy. Users can select and/or adjust the Medical Condition Type using the dropdown menu.

On the Medical Condition Detail page:

- 1. Under the **Medical Condition Type** section, select the appropriate choice from the drop-down menu based on the case info and county process.
- 2. Review remaining mandatory fields and make any adjustments, if applicable.
- 3. Click the **Save and Return** button.

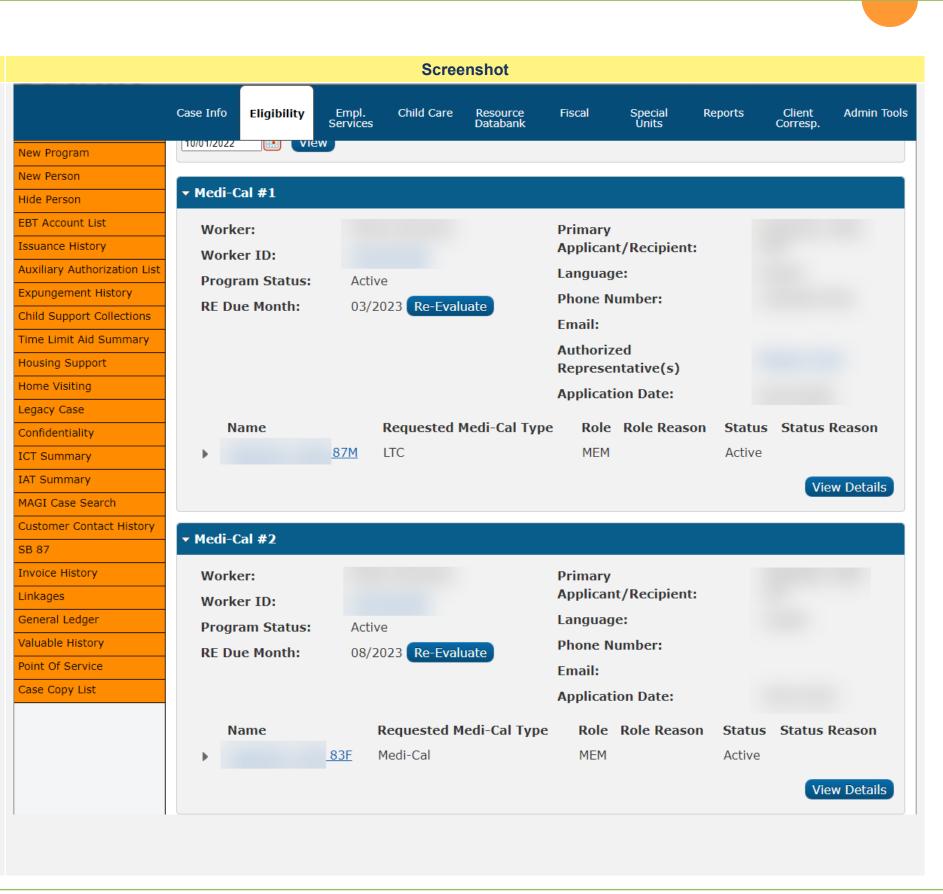
The following Job Aids are available to assist in CalSAWS located by clicking **Help** in the Utilities navigation bar:

- JA Medical Condition Detail Disabled or SP-DDSD
- JA Medical Condition Detail Fry v Saenz

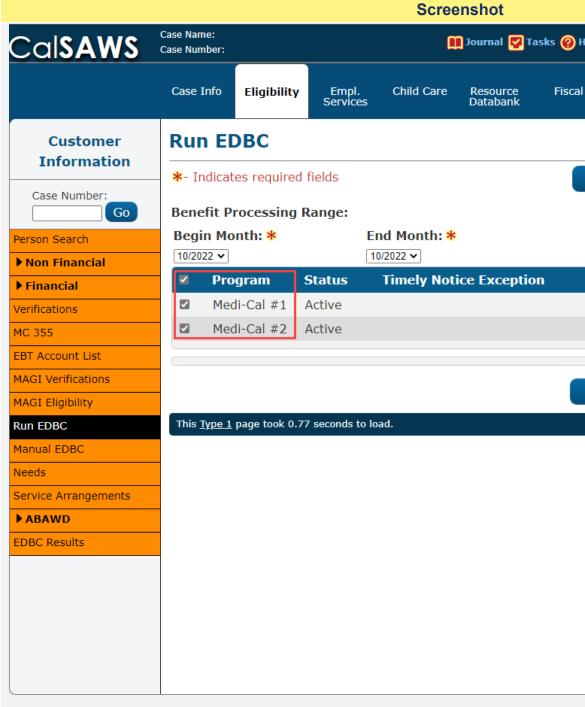
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9 For the Medi-Cal program in CalSAWS, married couples where one person is receiving Long Term Care (LTC) aid and the other spouse lives in the home and is receiving Medi-Cal must be established on the same case with two Medi-Cal program blocks; one for each person.

Separating each spouse onto their own individual case in CalSAWS will result in incorrect eligibility determinations for each household member.



On the Run EDBC page, both Medi-Cal programs must be selected to run EDBC simultaneously for the system logic to allocate income and property appropriately in the eligibility determination.



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In this example, if the CalWIN record, they must be combined in CalSAWS.

The Case Summary page allows users to view companion cases associated with the case. Note that companion cases are not added to a case automatically, they must be added manually

- 1. dentify the case numbers for each spouse and LTC case and determine which case to establish as the master record.
- 2. On the case chosen to remain open, place the cursor over **Eligibility** on the Global navigation bar and select **Case Summary** from the Local navigator.
- 3. Click the **New Program** link on the Task navigation bar to access the Program Detail page.
- 4. Select the Medi-Cal program under the Select Program dropdown menu and click the **Go** button to navigate to the New/Reapplication Detail page.
- 5. Ensure the appropriate details are entered (e.g., Application Date, Requested Medi-Cal Type, etc.) and check the box next to the name of the appropriate spouse for the newly added program and click the **Save and Return** button.
- 6. Continue forward until CalSAWS navigates the user back to the **Case Summary** page.
- 7. Place the cursor over **Eligibility** on the Global navigation bar and select **Customer Information** from the Local navigator.
- 8. Review the data collection pages to ensure that the appropriate information is available for the newly added spouse and update pages, as necessary.
- 9. Click the **Run EDBC** link on the Task navigation bar to access the Run EDBC page.
- 10. Check the box for both Medi-Cal programs and select the appropriate Run Reason from the Run Reason dropdown menu, as necessary.
- 11. Click the **Run EDBC** button to navigate to the **EDBC** List page.
- 12. Click the program hyperlink with a Run Status of Not Accepted, review the results for accuracy, and click the **Accept** button to navigate back to the **EDBC List** page.



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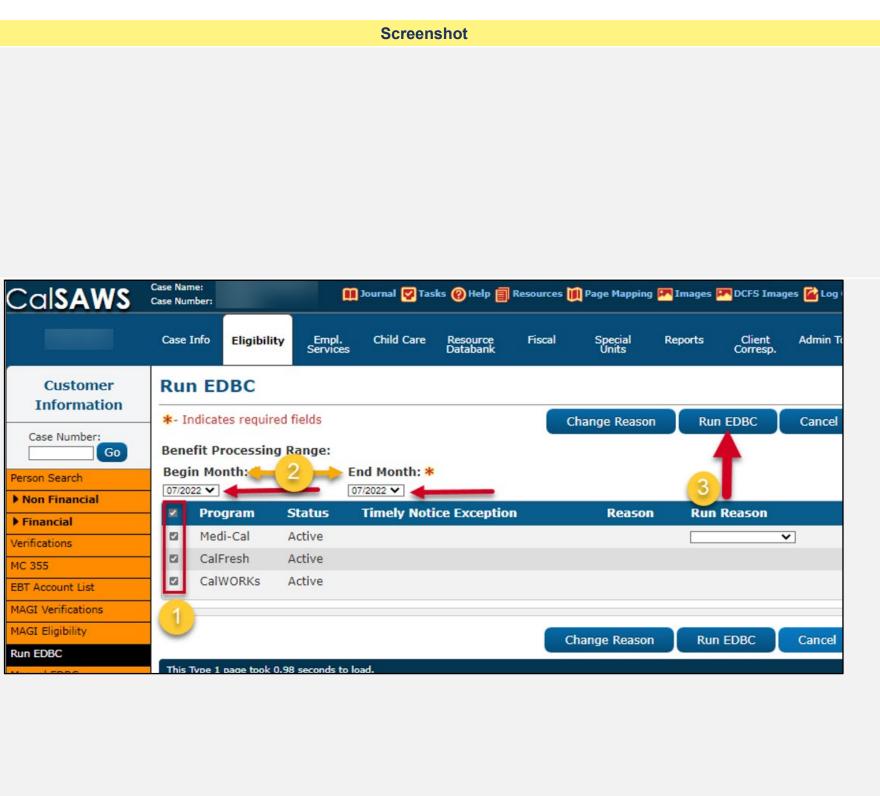
13. Click the **Save and Return** button.

On the duplicate case, take negative action per your county's business process.

The following Job Aids are available to assist in CalSAWS located by clicking Help in the Utilities navigation bar:

- JA Medi-Cal Long Term Care (LTC)
- 10 Once Users review all active case programs for any potential data collection discrepancies and make appropriate updates, Users will navigate back to the Run EDBC page to access, review, and accept the new EDBC budget results.

Users should review EDBC results to ensure accuracy before accepting results.



If the EDBC results are not what you expected, you will need to Troubleshoot. Review the case and data collection pages to verify the information was entered correctly. Correct any data entry errors. Then, run EDBC again. Accept EDBC results if results are as expected.

Do **NOT** Accept or Save EDBC Results that you think may be wrong.

You will have the option to preview the NOA before it is sent out to the Applicant/Participant, by clicking the Preview NOAs button after EDBC results have been accepted.

Follow your county's procedure when Troubleshooting EDBC Results.

Additional **Quick Guides** available in LMS and **Job Aids** available in CalSAWS:

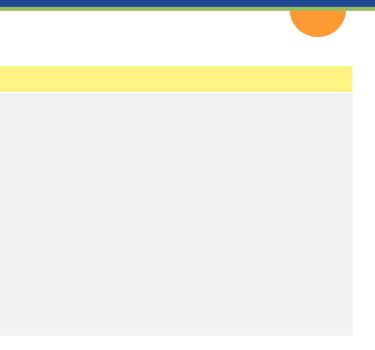
JA EDBC – Troubleshooting Incorrect Results JA EDBC - Online Definitions and Troubleshooting

S	Case Name: Case Number:			Journal 🕎 Tas	ks 🔞 Help 📋	Resources	ୂ Page Mapping	g 🎮 Image	s 🎮 DCFS Imag	es 🚰 Log Out
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Steps To Clear Alert				Scree	enshot	
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Change Rea	son	Accept	Cancel

Steps To Clear Alert	Screenshot



9 On the **EDBC List** page, click on the Program hyperlink to review each EDBC run. Once all the EDBC's have been accepted the User will be able to Save and Continue.

Customer Information EDBC List Corresp. Case Number: Go FDBC List Preview NOAs Save and Continue Cancel Case Number: Go CalFresh NOA run is complete - NOA generated Image: Contract of the second	Services Databank Units Corresp. Customer Information EDBC List Preview NOAs Save and Continue Cano Case Number: Go From: Go Corresp. Cano Go rson Search Display by: Program: Type Reason: Run Status: From: To: Program: Type Reason: Run Status: From: To: 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 09/2022 0 00/2022 0 00/2022 0 <th>AWS</th> <th>Case Number:</th> <th></th> <th></th> <th>Journal</th> <th></th> <th>esource</th> <th>s W Page Plap</th> <th>oping 🎮 Images</th> <th>DCFS Images</th> <th>tog out</th>	AWS	Case Number:			Journal		esource	s W Page Plap	oping 🎮 Images	DCFS Images	tog out
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10 Once all active programs have been accepted and saved, CalSAWS will navigate Users to the Distributed Documents Search page. Review all pending Notices of Action for accuracy.

				Scree	nshot	
Cal SAWS	Case Name: Case Number:			Journal 🕎 Tas	ks 🔞 Help 🥫	Resources
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal
Customer Information	Distrib	outed Do	ocumen	its Sear	ch	
Information	*- Indicat	es required	fields			
Case Number:	▶ Refine Y	our Search				
Person Search						
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es 🚺 P.	age Mapping	🎮 Images 🖡	PDCFS Imag	es 👔 Log Out	
	Special Units	Reports	Client Corresp.	Admin Tools	
		Ba	ck to EDBC	List page	
			Result	s 1 - 1 of 1	
rograi	n Status	Viewed V Service P			
7	~	▽			
	♥ Preview			Details	
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 11 Once the Notice of Actions one reviewed, according to County business processes. If the NOA is not reviewed, it will go out due to an overnight batch process. Novigate back to the Case Summary page. Novigate back to the Case Summary page. NOA NOA Not Review Only Double Case Summary page. NOA Not Review Only Case Case Summary page. Not Review Only Case Case Case Case Case Case Case Case	Steps To Clear Alert	Screenshot
DO NOT DISTRIBUTE	11 Once the Notice of Actions are reviewed, accepted, and saved, journal the action taken according to County business processes. If the NOA is not reviewed, it will go out due to an overnight batch process.	NOA Reject Cancel Preview Only Do not Distribute State of CALFORNA HELIFIAND VELTARE ABBRYCOSE State of CALFORNA HELIFIAND VELTARE ABBRYCOSE CALFRESH NOTICE OF TERMINATION WORK INCENTIVE NUTRITIONA SUPPLEMENT (WINS) BENEFITS State of CALFORNA HELIFIAND VELTARE ABBRYCOSE As of 08/31/2022, your WINS benefits is bengstoppel. Here's why: Augustoppel State of Distribute State Advantage cand you use Electronic Benefits Transfer (EST), yeen if you dia terminated. Prease do not how it away. Eff: Keep your plastic Golden State Advantage cand you use Electronic Benefits. Transfer (EST), yeen if you dia terminated. Prease do not how it away. Duestions? Adv your worker. Eff: Keep your plastic Golden State Advantage cand you use Electronic Benefits. Transfer (EST), yeen if you dia terminated. Previou & away. Duestions? Adv your worker. Eff: Keep your plastic Golden State Advantage cand you use Electronic Benefits. Transfer (EST), yeen if you heli-Cal benefits. you will receive another Notice of Acton. Keep your plastic Benefits identification Card(s). State Herits.
Rules: These rules apply; you may review them at your local welfare office: ACL 13-71, ACIN I-14-14, Welfare & Institutions Code 15525.		stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s).
		Rules: These rules apply; you may review them at your local welfare office: ACL 13-71, ACIN I-14-14, Welfare & Institutions Code 15525.

12 Journal the action taken according to County business processes.

The Yellow Banner should no longer appear on the case.

The case review is complete!

				Scree	nshot					
Cal SAWS	Case Name: Case Number:		m	🛾 Journal 🛂 Tasks 🛞 Help 🗐 Resources 🔟 Page Mappin				g 🏴 Images 🏴 DCFS Images 🕍 Log Out		
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
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		Summary								
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Auxiliary Authorization List	- CalFre	sh								
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Child Support Collections		Worker: Worker ID:				Primary Applicant/Recipient:				
Time Limit Aid Summary Housing Support		Program Status:		Active		Language:			English	
Home Visiting		RE Due Month:		11/2022 Re-Evaluate		Phone	Phone Number:			
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