# **Program Discontinued**

### Priority Level: 1

### Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care, GA/GR, Medi-Cal, RCA

#### 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 Batch EDBC is not saved.

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

When EDBC was run in CalSAWS, active Programs in the CalWIN system are now reflecting a Program Discontinuance in CalSAWS. Discontinuance reasons include, but are not limited to: Failure to Provide (FTP) Verifications, Over Income, Over Resources, CF Recert Expired, No Eligible Member, etc... Users will need to run EDBC in CalSAWS to find the actual discontinuance reason. Based on the reason for discontinuance, the User may need to update the appropriate data collection pages (Individual Demographics, Citizenship, Household Status, Relationship, Income, Customer Reporting, Verifications, etc.) and rerun EDBC.

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

COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY	SSA_INCOMESSI_SSP_C	OPA
00	Sample	00	1305 Sample	XXXXXXXXXX	XXXXXXX	CalWORKs	Program Discontinued	06/30/2022	Over Income	1		

**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.

In the steps to clear the Yellow Banner detailed below, we will review a variety of examples showing failed EDBC results for Program Discontinued EDBC mismatch reasons.

	Program Status Reason El	DBC Mismatch Reasons
No Eligible Member: Ineligible Non-Citizen	CalFresh Recertification Expired	Unrelated Primary Applicant

Eligible Child - No Deprivation

<u>Country of Citizenship Not Populated</u> and/or Section Code Update	No Eligible Member – Failed MAGI	Over Resources	<u>No</u> Rul
HH Members Discontinued for "Gets SSI" Role Reason	Failure To Provide County Residence	<u>Over Income</u>	<u>Up</u> Imr
Failure To Provide Verification	Failure To Provide Name/Identity	No Absent/Unmarried Parent Record	<u>No</u>

# **Examples**

# Program Discontinued

	Steps to Clear Alert	Screenshot
1	Log in to CalSAWS by entering your Username and Password	CalSAWS
		User Name
		Remember my username
		LOG IN

<u>Eligible Child – Mandatory/Optional</u> <u>es</u>

date Good Cause Option for munization

Appl – Req Person





	Steps to Clear Alert					Scree	nshot	
		Case Name Case Numb	: er:		🏢 Journal 🕎 Tasl	cs 🔞 Help [	Resources	🚺 Page M
		Case Ir	fo Eligibility	Empl. Service	Child Care s	Resource Databank	Fiscal	Spec Unit
		Case	Summa	r <b>y</b>				
		Case	Name				County	
		- Cor	npanion Case	s				
		Case	Number		1		Case Na	me
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		► Full Guid	Case Review i e for instructi	s require ions on h	d before EDBC ow to proceed.	is run and Programs	authorize Affected:	ed. Pleas : CalWOF
3	On the Case Summary Page:	Ca	SAWS C	ase Name: ase Number:	C	🚺 Journal 🕎 Tas	iks 🔞 Help 📋	Resources 🔰
	1. Click on the <b>Eligibility</b> tab on the Global		1-	Case Info	Eligibility Empl. Services	Child Care	Resource Databank	Fiscal
	2. Click on the <b>Customer Information</b> tab on the	Cas	e Summary	Case S	Workload Inventory			
	Local navigator	Case	Number: Go	Case Na	Customer Informatio	n 🗲	- 2	County
		Person : EBT Acc	Search ount Search	- Compa	Reporting Distributed Documents			
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1. Click on **Run EDBC** tab on the Task navigator.

Case Name: Case Number: Cal**SAWS** 🛄 Journal 🕎 Tasks 🔞 Help 🗐 Resources Case Info Eligibility Empl. Services Child Care Fiscal Resource **Contact Summary** Customer Information Case Number: Search Results Summary Go Display Person Search From: Non Financial Financial Verifications 4C 355 Address Information EBT Account List Туре Address Person MAGI Verifications MAGI Eligibility Mailing RICHMOND, CA 94804-4748 Run EDBC lanual EDBC Physical RICHMOND, CA 94804-4748

**Screenshot** 



1. Select all applicable Programs



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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Reason	Reports	Client Corresp.	Cancel
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When running EDBC, there are two types of 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.



**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 policy.



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In the following examples, we will review a variety of 5 failed EDBC results for **Program Discontinued** EDBC mismatch reason and identify the corresponding Data Collection pages to review for updates prior to rerunning EDBC.



Note: If the discontinuance reason appears  $\bigstar$  correct after case review, the User can accept and save the failed EDBC results.

Access the EDBC List page

1. Click on the **Program Link** to access the EDBC Summary Page and review the results.

The following Job Aids are available to assist in CalSAWS located in the Help Icon in the Utilitites navigator:

**EDBC - Online Definitions and Troubleshooting EDBC - Troubleshooting Incorrect Results** 



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etails	02/05/2022	Conversion	
ail	06/17/2022	Online EDB	C Rules
ail	06/17/2022	Online EDB	C Rules
			Cancel

6 The User will need to review discontinuance details within the **Program Configuration** section of the EDBC Summary to identify and update the data collection pages that may impact the eligibility determination.

In this first example, both HH Members are Discontinued for "Ineligible Non-Citizen" Role Reason.

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1. Navigate to the **Citizenship link** to review the Citizenship Detail Page for information that may need to be updated.

The following Job Aids are available to assist in CalSAWS:

Citizenship and Sponsorship - Add or Edit Vital Statistics

al <b>SAWS</b>	Case Name: Case Number			Journal 🕎 Tas	ks 🔞 Help 📋 Re	sources	Page Mapping	🎮 Image	s 🎮 DCFS Imag	ges 🚰 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Took
Customer Information	CalFre	sh EDB	C Sumn	nary						
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Citizenshin	System	n Determina	ation							
Pregnancy	EDBC S	Source: Onl	ine EDBC Ru	iles						
Deemed Eligibility	Progra	m Status:	Discontinue	t						
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Non-Compliance	Progra	m Status R	eason: No	Eligible Mem	1					
Customer Options	Note: (	Overridden ro	ows are in b	old.						
Money Mngmt	Name		DOB	Role	Role Reaso	n	Statu	s	Status Re	ason
Time Limits	Bai	isen 84M		FRE	Ineligible No	n Citize	en Discor	ntinued	No Eligible	Mem
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•								o		

#### 7 From the **Citizenship Status List** Page:

 Select the Edit button next to the HH Member to review and edit the Individual's Citizenship Status Detail page.



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				Add

- 8 In this example, the mandatory field **Country of Citizenship** and/or **Section Codes** were not populated and will need to be updated.
  - 1. Enter New Change Reason and New Reported Date, as applicable.
  - Select the Country of Citizenship as reported and/or verified by the Individual.
     \*\*\*(ex parte could be of value here, add note)
  - 3. Enter the correct **Document** Type if not already listed.
  - 4. Select the correct **Section Code** if not already listed.
  - 5. After reviewing and updating all other areas of the Citizenship Status Detail page, click **Save and Return**.

The following CalSAWS Reference Guide is available in the LMS:

#### CalSAWS Reference Guide – Change Reason

Additional data collection pages to review for completion:

Individual Demographics, Vital Statistics, Sponsorship, Verifications

	Case Name: Case Number DCFS Images DCFS Images 🔂 Log Out
	Case Info Eligibility Empl. Child Care Resource Fiscal Special Reports Client Admin Tools Services Databank
Customer Information	Citizenship Status Detail
Case Number:	
erson Search	New Change Reason: * New Reported Date: *
Non Financial	- Select -
Contact	
Root Questions	Name: * Name upon US Entry: Citizenship Type:
Individual Demographic	s · · · · · · · · · · · · · · · · · · ·
Vital Statistics	Retrieve Information
Household Status	Document: * Document Number:
Relationship	(I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code V
Citizenship	Document First Name: Document Middle Name: Document Last Name: Document Date of Birth:
Pregnancy	
Deemed Eligibility	Visa Number: SEVIS ID: Country of Passport
Residency	Issuance:
Other Prog. Assist.	
Non-Compliance	Section Code: *
Customer Options	
Money Mngmt	PRUCOL Reason:
Time Limits	Country of Citizenship: * A Number: b
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School Attend	Issue Date: Expiration Date:
Degrees Licenses	
Employment	Adjustment Date: Five Year Bar Admin Verification:
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9 Now on the Medi-Cal EDBC Summary Page, the User will need to review the Program Configuration section for the discontinuance details to identify the data collection pages that could potentially affect the program discontinuance.

In this example, both HH Members are Discontinued for "Gets SSI" Role Reason.

1. Navigate to the **Other Prog. Assist.** (Other Program Assistance) link to review for information that may need to be updated.

The following Job Aids are available to assist in CalSAWS:

#### Other Program Assistance (OPA) Detail Page

Additional Data Collection pages to review for completion: Individual Demographics, Medical Condition, Income.

Screenshot											
CalSAWS	Case Name: Case Number:	ase Name: ase Number: DCFS Images 🚰 Log Out									
	Case Info	Eligibility	Empl. Services	Child Can	e Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Too	
Customer	Medi-O	al EDB	C Summ	ary							
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Root Questions	Type: Re	Type: Regular									
Individual Demographic		Recalculation: No									
Vital Statistics	EDBC Ra	n for magi	Only: No								
Household Status	Program	Configurat	tion								
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Pregnancy	Program	Status: Di	scontinued		•						
Deemed Eligibility	Drogram	Status Poz	son: No Eli	aible Men							
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Absent Parents	Note: Ov	erridden rov	is are in bold	1.							
Medical Condition	Name	D	ОВ	Role R	ole Reason	Status	Statu	s Reason	Elected B	enefit	
Sponsorship	Baise	n 84M		UP Ge	ets SSI	Discontinu	ued No Elig	jible Mem			
Specialized Supportive	Ane	<u>80F</u>		UP Ge	ets SSI	Discontinu	ued No Elig	jible Mem			
Services	-							Override	e Program Con	figuration	

- 10 In this example, the CalWORKs program is discontinued for: **FTP Verification**.
  - 1. Navigate to the **Verifications** link to review the items outstanding on the Verification List Page.

The following Job Aids are available to assist in CalSAWS:

Verifications - Manage

				Scree	nshot					
Cal <b>SAWS</b>	Case Name: Case Number:		Journal 🕎 Tas	iks 🔞 Help 📋	Resources 🔰					
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal				
Customer Information	CalWORKs EDBC Summary									
Case Number:	Begin Mo	es required to	fields End Mo	onth	Run Date					
Person Search	07/2022				06/17/202	2 1				
Non Financial										
Financial	EDBC In	formation								
▶ GA/GR	Annual R	eporting Po	eriod Begin	Month: 02	/2022					
Verifications	Reportin	g Type Rea	son: Child	Only						
MC 355	Type: Re	gular								
EBT Account List	Recalcula	ation: No								
MAGI Verifications	Drogram	Configurat	ion							
MAGI Eligibility	Frogram	conngurat								
Run EDBC	System	Determinat	ion							
Manual EDBC	EDBC So	urce: Onlin	e EDBC Rule	es						
Needs	Aid Code	e:								
Service Arrangements	Program	Status: Di	scontinued							
ABAWD	Program	Status Rea	ason: FTP \	Verification						
EDBC Results										
	Note: Ov	verridden rov	vs are in bol	d.						
	Name			DOB	Role	Role Reas				
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- 11 From the **Verification List** page, review the requested item hyperlink to view and edit the item requested, or:
  - 1. Click **Verify** to confirm the item received and update the case record.



**Note**: Pending items can also be "verified" by adjusting the item's status within the appropriate Data Collection page. Clicking on any of the items' hyperlinks will allow you to address each item individually.

				Screer	nshot					
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Customer	Verifi	cation L	ist							
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Case Number:	Status:	*	From	ı:	•	To:				
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<ul> <li>GA/GR</li> <li>Verifications</li> </ul>	∎ Туре	e	Name	Reque Date	st Due Da	ate Po ES				
MC 355				-	~	~				
EBT Account List	□ <u>Inco</u>	<u>me</u>		05/01/	06 05/11/	06				
MAGI Verifications										
MAGI Eligibility Run EDBC	□ <u>Inco</u>	<u>me</u>		05/01/	06 05/11/	06				
Manual EDBC	Scho Date	ool End		08/23/	07 09/02/	07				
Service Arrangements	Date	ool End		08/23/	07 09/02/	07				
EDBC Results	D Other Assis	<u>er Program</u> stance		10/01/	11 10/01/	11				
	□ <u>Nam</u>	<u>e/Identity</u>		11/03/	16 11/13/	16				
	<u>Cour</u>	ntry of Birth		02/26/	21 03/03/	21				
		<u>Statistics</u> Citizenship		02/26/	21 03/03/	21				
	□ Scho Atter	ool ndance		02/26/	21 03/08/	21				



- 12 In this example, the CalFresh program is discontinued for: **CF Recert Expired** 
  - Navigate to the Eligibility tab and click on the Reporting link to review the outstanding Customer Report.

The following Job Aids are available to assist with review and processing of Customer Reports in CalSAWS:

CalWORKs CalFresh Re-Evaluation and Periodic Reporting Transitional CalFresh (TCF) Processing Barcoding Semi-Annual Report (SAR 7) - Process

Medi-Cal Renewal Packets

				Scree	nshot	
Cal <b>SAWS</b>	Case Name: Case Number:		ks 🔞 Help 📋	lp 🗐 Resources 🚺		
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal
Customer Information	CalFre	Workload In	ventory	ary		
Case Number:	- *- Indicat	Case Summ Customer Ir	ary	th	Run Date	
Person Search	07/2022	Reporting	-	-0	06/17/202	2 1
Financial	EDBC Inf	Distributed	Documents			
Verifications MC 355	Period Be Reporting	Customer S	chedule	_		
EBT Account List MAGI Verifications	Type: Re Recalcula	Courtesy Mo	onth			
MAGI Eligibility	Program	Configura	tion			
Run EDBC Manual EDBC Needs	System EDBC S	Determina ource: Onl	ation ine EDBC R	ules		
Service Arrangements  ABAWD	Program SUAS E	m Status: ligible: No	Discontinue	d		
EDBC Results	Program Program Note: C	<b>m Type:</b> Tr <b>m Status R</b> Overridden ro	ansitional <b>eason:</b> CF ows are in b	Recert Expire	ed	
	Name	Samantha	<u>L. 27F</u>	DOB	Role MEM MEM	Role Reaso
	-					

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- 13 On the **Customer Reporting List** page, review the CF RE Packet in **Sent** status to access the Customer Reporting Detail Page.
  - 1. Click **Edit** to access the CF RE Packet sent 04/28/2022

# Customer Reporting List

Search Results S	ummary			
Display Type: (	~	Display Name:	~	From:
Туре	Name		Submit Month	Program
			•	
MAGI RE Packet			09/2019	MC
MAGI RE Packet			09/2020	MC
CF RE Packet		Samantha	03/2022	CF

**Screenshot** 

- 14 On the **Customer Reporting Detail** page, review the CalFresh Status History
  - 1. Update the **Status** field as appropriate and enter the applicable **Date**
  - 2. Click **Save and Return** to save changes to the CF RE Packet status

#### **Customer Reporting Detail** \*- Indicates required fields Override Report Type: Submit Month: CF RE Packet 03/2022 Personal Contact: No 💙 Status Status Detail Program Status CF **CalFresh Status History** Status Date Action Date Status Sent 04/28/2022 04/28/2022 16:23:55 PM Generated 04/28/2022 04/28/2022 15:08:31 PM Override



- 15 In this example, the Medi-Cal program is discontinued for: No Eligible Member Failed MAGI
  - 1. Navigate to the **MAGI Eligibility** link to begin review of MAGI results

The following CalSAWS Quick Guide is available in the LMS:

CalSAWS Quick Guide – MAGI Determination Request

The following Job Aids are available to assist with MAGI and Medi-Cal eligibility review in CalSAWS:

Customer Options Detail - Add Medi-Cal - Tax Household Medi-Cal - MAGI Referrals and Eligibility Determinations Medi-Cal – MAGI Discontinuances Medi-Cal CalHEERS MAGI Eligibility Review

	Screenshot								
CalSAWS	Case Name: Case Number:			Journal 🕎 Tas	ks 🔞 Help 🗐 R	esources 🔰			
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal			
Customer Information	Medi-C	al EDB	C Sumn	nary					
Case Number:	Begin Mo	onth	End Mo	nth	Run Date	R			
Person Search	07/2022				06/17/2022	N			
Non Financial	EDBC In	formation							
Financial GA/GR Verifications MC 355 EBT Account List MAGI Verifications MAGI Eligibility Run EDBC Manual EDBC	Type: Re Recalcul EDBC Ra Program System I EDBC So Program Program	Type: Regular Recalculation: No EDBC Ran for MAGI Only: Yes Program Configuration System Determination EDBC Source: Online EDBC Rules Program Status: Discontinued							
Needs				,					
ABAWD	Note: Ov	erridden rov	vs are in bol	d.					
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		BOBBY		MEM		Discont			

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		Overnue	Program Co	inguration

- 16 On the MAGI Determination List page, the Begin Month, End Month and Program Identifier must be selected before the User can Request MAGI.
  - 1. A soft validation is presented when attempting to **Request MAGI** without the minimum requirements being met to make a MAGI determination.
  - 2. Navigate to the **Tax Household** link to review and update Tax Household information as prompted.

Note: Users can review any previous MAGI Determination by clicking on the hyperlink to the applicable benefit month.

	Screenshot					
Cal <b>SAWS</b>	Case Name: Case Number:		m	Journal 💟 Tas	ks 🔞 Help 🥫	Resources
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal
Customer Information	MAGI	Determ	ination	List		
	*- Indicat	es required	fields			
Case Number:	A MAGI D	eterminati	on Reques	t cannot be	sent. The f	ollowing
Person Search	month ra	nge:			- ( I) - (	
Non Financial	• 1a)	<ul> <li>BOBBY</li> </ul>	i informati	ion is missin	ig for the fo	bliowing
▼ Financial		_				
Root Questions	Request	MAGI Dete	rmination			
Income	Begin Mo	onth: *				End Mo
Tax Household	07/2022 🗸	]				07/2022
Property	Program	Identifier:	*			
Special Needs	Life Chau					
Expenses		ige Event.		~		
Medicare 2	_ Bypas	s Primary (	Contact Ma	tching Crite	ria	
Third Party Liabili		st Lift Onti	one			
Other Health Care		.st Lift Opti				
Health Care Ref.	Reque	est Negativ	e Action D	eterminatio	n	
IEVS	🗆 Resta	rt VLP e-Ve	rification			
Hunt V. Kizer						
Verifications						
MC 355	Display I	MAGI Deter	minations			
FBT Account List	Begin Da	ite:				End Dat
MAGI Verifications						
MAGI Eligibility						
Run EDBC						
Manual EDBC	Search R	esults Sum	imary			
Needs	Benefit	Тур	e	Status	Time	
Service Arrangements	Month				Run	
▶ ABAWD	07/2016	Dete	ermination	Complete	06/05	/2016
EDBC Results					8:38	AM



17 On the **Tax Household Detail Page**, review and update the following mandatory fields:

- 1. Select the **Primary Tax Filer** from the dropdown box.
- 2. Indicate whether the Individual is **required to file taxes** for the current year.
- 3. Indicate whether the Individual **is planning to file taxes** for the current year.
- 4. Click **Save** to add the record.

User can now navigate back to the MAGI Eligibility page or run full Medi-Cal hierarchy, as applicable, to assess for appropriate Medi-Cal eligibility and accept and save the results.

		Screenshot					
Cal <b>SAWS</b>	Case Name: Case Number:			Journal 🕎 Tas	iks 🔞 Help 📋	Resources	
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	
Customer Information	Tax Ho	ousehol	d Detai	I			
	*- Indicat	es required	fields				
Case Number:	Name:	ROBBY		P	rimary Tax	Filer: *	
Person Search		DODDI					
Non Financial	Is this p	erson expe	ected to be	required to	file taxes f	or the cu	
▼ Financial	- Select - 🗙	•	_	2			
Root Questions	Is this p	erson plan	ning to file	taxes for t	he current y	ear? 粩	
Income	- Select - V		_	3			
Tax Household	Expecte	d Filing Sta	itus:				
Property	-Select-	~	·				
Special Needs	Caretak	er Relative	:				
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Medicare	Tc this n	orson ovne	acted to be	claimed as	a Depender	nt hy a no	
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Other Health Care	Who sta	inc this se		) on on don't t	his year?		
Health Care Ref.	-Select- V	inis triis pe	rson as a L	vependent t	ins year?		
IEVS							
Hunt v. Kizer	Projecte	d Annual I	ncome				
▶ GA/GR	Project	ed Annual	Income An	nount: Is t	the Projecte	d Annual	
Verifications					~		
MC 355							
EBT Account List							
MAGI Verifications							



- 18 In this example, the CalWORKs program is discontinued for: FTP County Residence
  - 1. Navigate to the **Residency** Page to update and verify Residency information prior to re-running EDBC.

Additional Data Collection pages to review for completion:

Contact, Living Arrangement, Household Status, etc.

				Scree	nshot	
Cal <b>SAWS</b>	Case Name: Case Number:		m	Journal 🕎 Tas	ks 🔞 Help 📋	Resources 🔰
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal
Customer	CalWO	RKs ED	BC Sun	nmary		
Information	*- Indicat	es required	fields			
Case Number:	Destinut	-	E-d M-		Dere Dete	
G0	Begin Mo	ontn	Ena Mo	onth	Run Date	i i
Person Search	07/2022				06/1//202	2 1
<ul> <li>Non Financial</li> </ul>	EDDC T	·				
Contact	EDBC In	formation				
Root Questions	Semi-An Monthu (	nual Report	ting Period	Begin		
Individual Demographics	Month: (	J5/2022				
Vital Statistics	Reportin	g Type Rea	son:			
Household Status	Type: Re	egular				
Relationship	Recalcula	ation: No				
Citizenship	Program	Configurat	ion			
Pregnancy	l ogi uli					
Deemed Eligibility	System	Determinat	ion			
Residency	EDBC So	urce: Onlin	e EDBC Rul	es		
Other Prog. Assist.	Aid Code	a:				
Non-Compliance	Program	Status: Di	iscontinued			
Customer Options	Program	Status Rea	ason: FTP (	County Resid	ence	
Money Mngmt				,		
Time Limits						
Purch. and Prep.	Note: 0	erridden rov	vs are in bol	d.		
Immunizations	Name		DC	DB	Role Ro	le Reason
School Attend.	A	methyst N. 3	<u>BF</u>		MEM	
Degrees Licenses	D	avid A. 33M			MEM	
Employment	<u></u>	ziak A. 7M			MEM	
Striker						
Unempl. Depriv.	> Report	ina Confiau	ration			
Work Regist.						
Living Arrgmt						
Homeless Assistance	→ Work E	ligibility				

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	Discontinue	ed F	тр с	ounty I	Reside	ence	L
-		Over	ride F	Program	n Con	figuration	

- 19 In this example, the CalWORKs program is discontinued for: FTP Name/Identity
  - 1. Navigate to the **Individual Demographics** Page to update and verify and Individual information prior to re-running EDBC.

Additional Data Collection pages to review for completion:

Vital Statistics, Citizenship, Verifications, etc.

				Scree	nshot					
Cal <b>SAWS</b>	Case Name: 🗰 Journal 💟 Tasks 🛞 Help 🗐 Resources 🔟 Page Mapping 🎮 Images 🏧 DCFS Images 🕍 Log Out									
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databani	Fiscal	Special Units	Reports	Client Corresp.	Admin Tool
Customer	CalWO	RKs ED	BC Sun	nmary						
Information	*- Indicat	tes required	fields				Change Re	ason	Accept	Cancel
Case Number:	Begin Me	onth	End Mo	onth	Run Dat	e	Run Status		Accepted By	,
Person Search	07/2022				06/17/2	)22	Not Accepted	ł		
Non Financial										
Contact	EDBC In	EDBC Information								
Root Questions	Semi-An	Semi-Annual Reporting Period Begin								
Individual Demographic	Month:	Month: 05/2022								
Vital Statistics	Reportin	g Type Rea	son:							
Household Status	Type: Re	egular								
Relationship	Recalcul	ation: No								
Citizenship	Program	Configurat	ion							
Pregnancy	Gustam	Determinet	lan							
Deemed Eligibility	System	Determinat	ion							
Residency	EDBC So	ource: Onlin	e EDBC Rul	es						
Other Prog. Assist.	Aid Code	e:			-					
Non-Compliance	Program	n Status: Di	scontinued							
Customer Options	Program	n Status Rea	ason: FTP	Name/Identit	ty					1.00
Money Mngmt	_									
Time Limits	Note: O	verridden rov	vs are in bo	ld.						
Purch. and Prep.										
Immunizations	Name		D	OB	Role	Role Reaso	on Statu	5	Status Reaso	on
School Attend.	(	Omar 10M			MEM	DIAL THEFT	Discon	tinued	FTP Name/Ide	ntity
Degrees Licenses	5	Juis E 50M			MEM	Lw time Lir	Discon	tinued	FTP Name/Ide	ntity
Employment		Joanna O. 15	F		MEM		Discon	tinued	FTP Name/Ide	ntity
Striker			-				Dioton	Ourreit		Gaundian

	Steps to Clear Alert
20	<ol> <li>Click Verify to confirm receipt of any item that has been verified by the Participant.</li> </ol>
	The Verification list page will list and display any verifications that are in a pending status on the data collection pages.
	On this page, Users can verify verifications and also send out a CW 2200 form.
	Follow your county policy when adding verifications to the <b>Verification List</b> page.
	For information on how to add, edit and view the details of verification requests, see Job Aid: <b>JA Verifications – Manage</b>

					Scree	nshot	
Cal <b>SAWS</b>	Case Name: Case Number:			🛄 Jouri	nal 🜠 Tasl	cs 🔞 Help 📋	Resources
	Case Info	Eligibility	Empl. Service	s Cł	hild Care	Resource Databank	Fiscal
Customer Information	Verific	ation L	ist				
Case Number:	*- Indicat	es required	fields F	rom:		1	Τα
Person Search  Non Financial	Coarch R	oculto Cum				-	
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Verifications MC 355	🔳 Туре		Name		Reques Date	t Due	Date P F
EBT Account List					<b>•</b>	~	~
MAGI Verifications	■ <u>Name</u>	e/Identity		Omar	01/18/1	2 01/28	3/12
MAGI Eligibility							
Run EDBC	Vital :     Ident	<u>Statistics</u> itv		Omar	07/17/1	8 07/2	7/18
Manual EDBC				-			
Needs	Atten	ol dance		Omar	11/06/1	9 11/10	5/19
Service Arrangements							
ABAWD	Genera	ate Form					
EDBC Results							



- 21 In this example, the CalWORKs program is discontinued for: **Unrelated Prim Appl** (Unrelated Primary Applicant)
  - 1. Navigate to the **Relationship** Page to review and update any missing or incomplete records prior to re-running EDBC.

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

Create a Case – New Applicant Establish a Case - Existing Person JA Relationship Information – Add

				Scree	nsnot					
Cal <b>SAWS</b>	Case Name: Case Number:		Ø	Journal 🕎 Tas	sks 🔞 Help	Resources	💓 Page Mapping	🕅 Image	s 🎮 DCFS Imag	es 👔 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Took
Customer Information	CalWO	RKs ED	BC Sun	nmary						
1	*- Indicat	es required f	ields				Change Rea	son	Accept	Cancel
Case Number:	Begin Mg	onth	End Mo	onth	Run Dat	e	Run Status		Accepted B	v
Person Search	07/2022				06/17/20	022	Not Accepted			,
Non Financial										
Contact	EDBC Information									
Root Questions	Reporting Type Reason:									
Individual Demographics	Type: Regular									
Vital Statistics	Recalcula	ation: No								
Household Status	Decom	C								
Relationship		Configurat	ion							
Citizenship	Syem I	Determinat	ion							
Pregnancy	EDBC So	urce: Onlin	e EDBC Rul	es						
Deemed Eligibility	Aid Code	:								
Residency	Program	Status: Di	scontinued							
Other Prog. Assist.	Drogram	Status Pos	son: Unre	lated Drim A	nol					
Non-Compliance	View All	Status Kea	ison. onre	accu FIIII A						
Customer Options										
Money Mngmt	Note: Or	orddon nw	a ara la kai	ы						
Time Limits	Note: OV	erridden row	is are in Do	iu.						
Purch. and Prep.	Name		D	OB	Role	Role Reaso	n Status		Status Reaso	n
Immunizations	A	methyst N. 3	E		MEM		Discontir	nued (	Unrelated Prim	Appl
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School Accella.	Iz	ziak A. 7M			MEM		Discontir	nued (	Unrelated Prim	Appl
Degrade Ligenses								(		

22 The status message on the **Relationship List** page reflects there are *no missing relationships* needing to be added to this case record.

There are **Parental Control** records reflecting **Yes**.

Users should navigate back to **Case Summary** page to review the Primary Applicant and Payee information within the CW Program.

				Scree	nshot		
Cal <b>SAWS</b>	Case Name: Case Number:		🛄 Jou	ırnal 🕎 Tasi	ks 🔞 Help	Reso	urces
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fi	scal
Customer	Relatio	onship	List				
Information	Number of	relationship	os remaining to	be create	d: 0		
Case Number:	Search R	esults Sun	nmary				
Person Search		Display b	y hini		From		
▼ Non Financial		All Related	snip:	$\overline{}$	From:		
Contact				_		(	
Root Questions	_						
Individual Demographic	s Person	1	Relationship		Person 2	2	Pa Co
Vital Statistics	-		~		~		
Household Status		David I	Parent				N
Relationship	33M	(	(Biological/Ado	ptive)	Amethys	t 3F	
Citizenship		I	Parent		I	Izziak	Ye
Pregnancy		(	(Biological/Ado	ptive)	7M		
Deemed Eligibility		Izziak	Sibling (full or l	half)			N
Residency	7M		Sibiling (run or i	iun y	Amethys	t 3F	
Other Prog. Assist.		Mikayla	Shouse		[	David	N
Non-Compliance	27F		opouse		33M		
Customer Options		1	Parent		I	Izziak	Ve
Money Mngmt		(	(Biological/Ado	ptive)	7M		16
Time Limits		I	Parent				V
Purch. and Prep.		(	(Biological/Ado	ptive)	Amethys	t 3F	re
Immunizations							

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23 On the Case Summary Page, review the Case Name (editable field), Primary Applicant and Payee information.

Review Program Members in Active Status and all Persons Associated to Case and their respective household status.

In this example the Primary Applicant, Mikayla, has been discontinued: out of the home.

Case Name: David

Primary Applicant/Recipient: Mikayla (out of home) Payee: David

Follow county policy for case setup and Primary Applicant/Payee designation.

If a new case needs to be established, the following Job Aid is available to assist:

#### Create a Case – New Applicant Establish a Case - Existing Person

If it is determined that a new Primary Applicant/Payee can be added since the Case Name remains In the Home, proceed to next steps:

1. Click **View Details** to navigate to the CalWORKs Detail page.



Page Mapping 🎮	Images 🎮	DCFS Imag	es 🔂 Log (	Out
Special Re Units	eports	Client Corresp.	Admin To	ools
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al .				
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ion Date:	08/03/	2018		
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Active			•	
Active			Ų –	
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Disconti	nued View W	/PR Vie	w Details	

- 24 On the CalWORKs Detail page, review the Administrative Roles and Program Persons identified on the case.
  - 1. Click Add to enter a new Administrative Role



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Special Units	Reports	Client Corresp.	Admin Tools
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nued			
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History	Save and I	Return	Cancel

#### 25 In the Administrative Role Detail page:

- 1. Select **Primary Applicant/Recipient** from the dropdown selection window.
- 2. Select the new Primary Applicant (Case) Name.
- 3. Enter the **Begin Month** of the change.
- 4. Click **Save and Return** to update the record.



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26

for: Over Resources

completion:

running EDBC.



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Reports	Client	Admin Tool
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27

Steps to Clear Alert	Screenshot
this example, the CalWORKs program is discontinued	Cale Name: Cale Number:
or: Over Income	Case Info Eligibility Empl. Child Care Resource Fiscal Special Report Services Databank Units
1. Navigate to the <b>Income</b> link to review and	Customer Information CalWORKs EDBC Summary
update any Income information for prior to re- running EDBC.	Case Number: Go Begin Month End Month Run Date Run Status 07/3023 05/(9/2023 Not Accepted
neuro incomo is correctly optored on the locomo	► Non Financial      ▼ Financial      EDBC Information
Detail page.	Root Questions Semi-Annual Reporting Period Begin Month: 07/2022 Description Tures Research
nsure Beain and End Dates are correct for each	Tax Household Reporting Type Reason: Property Type: Regular Special Needs Recalculation: No
ncome record	Expenses Program Configuration System Determination
	Third Party Liabil 1 Other Health Care Ref. Aid Code:
Additional Data Collection pages to review for completion:	IEVS         Program Status: Discontinued           Hunt v. Kizer         Program Status Reason: Over Income
Other Program Assistance, Expenses, Medicare, etc.	Verifications  MC 355  EBT Account List
	MAGI Venfications         Name         DOB         Role         Role Reason         Status           MAGI Eligibility         Elizabeth P. 30F         MEM         Discontinued
he following Job Aids are available to assist in	Run EDBC MEM Discontinued
COISAWS:	Service Arrangements   ABAWD
ncome Categories and Types in the System	EDBC Results Work Eligibility
/erifications - Manage	CalWORKs Budget
	Unearned Income
	Net Unearned Income
	Earned Income
	Earned Income Disregards Net Earned Income
	Total Net Nonexempt Income
	MAP Family Unit Size
	Family MAP
	Family MAD Test

- 28 In this example, we are receiving a validation message indicating there is **no Absent/Unmarried Parent** record for this two-parent CalWORKs AU.
  - 1. Click **Run EDBC** to navigate to the EDBC Results page.

				Screer	nshot	
CalSAWS	Case Name: Case Number:			Journal 🕎 Tasl	ks 🔞 Help 📋 I	Resources
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal
Customer Information	Run E	DBC				
Case Number:	Benefit P	tes required rocessing F	fields Range:			
Person Search	Begin Mo	onth: *	EI	nd Month: *		
Non Financial	07/2022 V			7/2022 🗸		
▶ Financial	Pro	ogram S	Status	limely Noti	ce Exception	
Verifications	Mee	di-Cal /	Active			
MC 355	🖬 Cal	Fresh /	Active			
EBT Account List	🖾 Cal	WORKs /	Active			
MAGI Verifications						
MAGI Eligibility	There is	no Absent/	/Unmarried	d Parent reco	ord for the f	ollowing
Run EDBC	• Ta	salla				
Manual EDBC	• AI	minullah				
Needs	· ·					
Service Arrangements						
▶ ABAWD	To contin	ue runnina F	DBC, click t	he "Run EDB(	" button.	
EDBC Results		ao rannig c			buttom	



- 29 On the CalWORKs EDBC Summary, results show the twoparent CW AU has been discontinued for: No Elig. Child (No Eligible Child) - No Deprivation. In this example, we have received the Soft Validation message indicating there was no Absent/Unmarried Parent record, so we will begin our review there.
  - 1. Click the **Absent Parent** page to update Data Collection as prompted by the soft validation error message.

Once updated, additional Data Collection pages to review for completion and accuracy, as this is a twoparent AU requiring a Deprivation determination:

Unemployment Deprivation, Medical Condition, Potentially Available Income, Household Status, Relationship, Individual Demographics (deceased parent record if previously in the home), etc...

The following Job Aids are available to assist in CalSAWS:

Child Support - Support Questionnaire Unemployment Deprivation Detail - PWE Worksheet and Detail Page Employment Detail - Add or Edit Medical Condition Detail – Disabled or SP-DDSD

#### Screenshot CalSAWS Case Name: Case Number: 🏢 Journal 🕎 Tasks 🔞 Help 🗐 Res Case Info Eligibility Empl. Services Child Care Fiscal Resource CalWORKs EDBC Summary Customer Information \*- Indicates required fields Case Number: Go **Begin Month End Month Run Date** 07/2022 06/19/2022 erson Search Non Financial EDBC Information Contact Root Questions Reporting Type Reason: Type: Regular Individual Demographics Vital Statistics Recalculation: No Household Status **Program Configuration** Relationship System Determination Citizenship EDBC Source: Online EDBC Rules Pregnancy Deemed Eligibility Aid Code: Residency Program Status: Discontinued Other Prog. Assist. Program Status Reason: No Elig. Child Non-Compliance Customer Options Note: Overridden rows are in bold. Money Mngmt **Time Limits** Name DOB Role Role Reason Purch. and Prep. MEM MEM Immunizations Asadullah 10M MEM School Attend. Tasalla 7F MEM Degrees Licenses Aminullah 5M MEM Employment Striker • Reporting Configuration Unempl. Depriv Work Regist. Living Arrgmt • Work Eligibility Homeless Assistance Potentially Avail, Incon Aid Payment Military/Veterans Penalties Absent Parents Medical Condition Potential Benefit Sponsorship Previous Potential Benefit Specialized Supportive Overpayment Adjustment Amount Services SFIS Authorized Amount Institutional Information

Page Mapping	🎮 Images	DCFS Imag	jes 🚰 Log Out
Special Units	Reports	Client Corresp.	Admin Tools
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Status	Status	Reason	
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		\$	0.00
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- 30 In this example, the CalWORKs program is discontinued for: No Elig. Child (No Eligible Child) Mandatory/Optional Rules
  - 1. Click on the **Relationship** link to review data collection page prior to re-running EDBC.

Confirm **Relationships** are correctly established and verified.

Verifiy all AU/HH Members have an **In the Home** record is effective as of the Application Date/BDA or earlier.

Confirm all required **AU/HH Members** persons have been added to the Program.

Additional Data Collection pages to review for No Eligible Child:

Individual Demographics, Household Status, Citizenship, School Attendance, Immunizations, Other Program Assistance, Absent Parent, Unemployed Parent, Vital Statistics, Citizenship, Verifications, etc.

The following Job Aids are available to assist in CalSAWS:

#### Relationship Information – Add

School Attendance Information-Add and Edit Medical Condition Detail - Fry v Saenz Welfare to Work Exemptions – Adding and Editing Sanction Process – Curing a Sanction with a Cure Sanction Activity

				Scree	nshot					
CalSAWS	Case Name: Case Number:			Journal 💟 Tas	sks 🔞 Help 📋	Resources	间 Page Mappin	g 🎮 Ima	ges 🎮 DCFS I	mages 🕍 Log Ou
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Repor	ts Clien Corres	t Admin Too p.
Customer Information	CalWO	RKs ED	BC Sun	mary						
Case Number:	+- Indicat	tes required	fields				Change Re	ason	Accept	Cancel
Go	Begin Mo	onth	End Mo	nth	Run Date		Run Status		Accepte	d By
Person Search	07/2022				06/19/2022	2	Not Accepted			
Non Financial										
Contact	EDBC In	formation								
Root Questions	Reportin	g Type Rea	son:							
Individual Demographic	s Type: Re	egular								
Vital Statistics	Recalcula	ation: No								
Household Status										
Relationship	Program	Configurat	ion							
Citizenship	System	Determinat	ion							
Pregnancy	EDBC So	urce: Onlin	e EDBC Rule	s						
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Residency	Proceeding	Chatway D	and the second							
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Non-Compliance	Program	i Status Re	ason: No El	ig. Child						
Customer Options	-									
Money Mngmt	Note: Ov	verridden rov	vs are in bol	d.						
Time Limits	Name			DOB	Role	Role Rea	son Status		Status Reas	son
Purch. and Prep.		М	erava Z. 14F				Discont	inued N	1andatory/O	ptional Rules
Immunizations		Le	ilony V. 13F				Discont	inued N	1andatory/O	ptional Rules
School Attend.		Consuela	M. 40F				Discont	inued N	lo Elig. Child	
	-							Over	ride Program	Configuration

- 31 On the **Relationship List** page, there is no **Parental Control** indicated within the record for the Primary Applicant/Parent.
  - 1. Click **Edit** to access the **Relationship Detail** page and update the information the parental control.

				-						
				Scree	enshot					
Cal <b>SAWS</b>	Case Name: Case Number:			Journal 🕎 Ta	sks 🔞 Help 📋	Resources 🔟	Page Mapping	🎮 Images 月	DCFS Imag	jes 🚰 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer Information	Relatio	onship	List							
Case Number:	Number of	relationshi	ps remaining	to be creat	ed: 0					Continue
Go	Search R	esults Sur	nmary						Result	s 1 - 6 of 6
Person Search		Display b	ру bio		Francis		Ter			
▼ Non Financial		All Related	snip:	~)	From:		10:			View
Contact										Add
Root Questions	Deserve		n-l-1:	_		Descela		r-d		
Individual Demographics	Person	1	Relationshi	p F	erson 2	Control	і веділ Date	End Date		
Vital Statistics	_ <b>_</b>		~		~					
Household Status			child			No	20	10		Edit
Relationship	Leilony	13F	Child	C	Consuela 40F	NO	20	10	Vie	ew History
Citizenship				-			_			Edit
Pregnancy	_		Sibling (full o	or half)		No	20	09	N	Euit
Deemed Eligibility	Meraya	14F		L	eilony 13F.		_		VI	ew History
Residency			Child		Consula 405	No	20	010 🚺		Edit
Other Prog. Assist.	Meraya	a 14F			onsuela 40F				Vie	ew History
Customer Ontions	_	Reina	Child			No	'2(	)10		Edit
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Time Limits	-									Edit
Purch, and Prep.			Sibling (full o	or half)	lorava 145	No	20	09	Vie	ew History
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School Attend.			Sibling (full o	or half)		No	20	009		Edit
Degrees Licenses			2 .	L	eilony 13F.				Vie	ew History

**Screenshot** 

- 32 On the **Relationship Detail** page, Indicate the **New** Change Reason and **New Reported Date** as applicable before updating the record
  - Confirm the Parent/Child Relationship is indicated between the First Individual and Second Individual.
  - 2. Select the checkbox Has Parental Control and/or Responsible Relative, as applicable.
  - 3. Click **Save and Return** to update the record.

Quick Guide Change Reason is available in the LMS for additional information

Cal <b>SAWS</b>	Case Name: Case Number:			ũ	] Journal 🕎	Tasks 🔞 Hel
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal
Customer Information	Relatio	onship I	Detail			
	🔺 - Indicat	es required	fields			
Case Number:	Change R	Reason				
Person Search	New Cha	ange Reaso	n: <b>*</b>			New Repo
▼ Non Financial	- Select -		~			
Contact	Change	Reason:				Reported
Root Questions	Intake					05/25/202
Individual Demographics						
Vital Statistics	First Ind	ividual: *		Relationship	*	_
Household Status			26F	Parent (Biological/	Adoptive)	<u>~</u>
Relationship	Respo	nsible Relati	ve			
Citizenship	Hac Da	arontal Cont		2		
Pregnancy					/	
Deemed Eligibility	Begin Da	ate: *				End Date:
Residency	09/22/2013					
Other Prog. Assist.	Verified	:*				
Non-Compliance	Verified	✓ View				
Customer Options						
Money Mngmt						



33 On the **Relationship** List page, confirm that the **Parental Control** indicator is marked **Yes** to reflect the Primary Applicant/Payee with Parental Control is indicated on this page.

> Now that the case updates have been made, navigate back to **Run EDBC** page to complete the eligibility determination on the program.

				Scree	enshot					
Cal <b>SAWS</b>	Case Name: Case Number:		د 🋄	ournal 🕎 Tas	iks 🔞 Help 🗐 R	Kesources 🔟 Pa	ge Mapping 🏴	Images 🎮 D	CFS Imag	es 🕍 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal S	Special R Units	eports C	Client Corresp.	Admin Tools
Customer	Relatio	onship	List							
Information	Number of	relationship	s remaining	to be create	d: 0					Continue
Case Number:	Search R	esults Sun	ımary						Result	51-6of6
Person Search		Display b Relations	y hip:		From:		To:			
Non Financial     Contact	_	All Related		$\checkmark$						View
Root Questions	_									Add
Individual Demographic	s Person	1 1	Relationship		Person 2	Parenta	al Begin Date	End Date		
Vital Statistics	· ·	•	~		~	Control	Date	Date		_
Household Status		F	Parent							Edit
Relationship	Consuel	a 40F (	Biological/Ad	loptive)	Loilony 12E	Yes	20	10	Vie	w History
Citizenship					Lenony 15P				_	
Pregnancy		F	Parent			Yes	20	10		Edit
Deemed Eligibility		(	Biological/Ad	loptive)	Meraya 14F				Vie	ew History
Residency										Edit
Other Prog. Assist.		9	Sibling (full or	r half)	1	No	20	09	Vie	w History
Non-Compliance	Meraya	14F			Leilony 13F					

Steps to Clear Alert					Scree	enshot		
Once back on CalWORKs EDBC Summary page, note		Case Name: Case Number:		m	Journal 🕎 Ta	sks 🔞 Help 🗐	Resource	es
that the CW program is now Active, and all AU members are currently aided.		Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	1
	Customer	CalWO	RKs ED	BC Sun	nmary			
	Information	*- Indicat	tes required	fields				
	Case Number:	Begin Mo	onth	End Mo	onth	Run Date		
	Person Search	07/2022				06/19/2022	2	
	Non Financial	EDRC IN	formation					
	Financial     Verifications	Semi-An	nual Report	tina Period	Begin			
	MC 355	Month: (	05/2022					
	EBT Account List	Reportin	g Type Rea	son:				
	MAGI Verifications	Type: Re Recalcula	ation: No					
	Manual EDBC	Program	Configurat	lion				
	Needs	System	Determinat		05			
	Service Arrangements	Aid Code	e: 30 - CW-	All Other Fa	amilies (Fed)	1		
	EDBC Results	Program	Status: A	ctive		I		
		Note: Ov	verridden rov	vs are in bo	ld.			
		Name	14	erava 7 14	D	OB	Role	R
				eilony V. 13	-		MEM	
			Consuela	<u>M. 40F</u>	_		MEM	_
		▼ Report	ing Configu	iration				
		Name				Role	Adul	t/(
			Ν	leraya Z. 1	4F	MEM	Child	
			Consuela	ellony V. 13	iF.	MEM	Child	-
			Consuela	11. TUF		I'ICI'I	Auult	

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:	Special Units	Reports	Client Corresp.	Admin Tools
Cł	nange Re	ason	Accept	Cancel
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		Active		
		Override	e Program Cor	figuration
hild		Claiming	Deprivat	tion
		Federal	Absence	
	I	Federal	Absence	
	I	Federal		

34 In this example, the CalWORKs program can be impacted with a negative action if the immunization record in CalSAWS does not indicate the appropriate status such a **Good Cause**. In CalWIN there is an option to document a "Good Cause" entry when a child is behind on immunizations. There is no "**Good Cause**" option in CalSAWS. If a customer is working on bringing a child up to date on immunizations, it is considered that they are meeting requirements and the option of "Up to Date" would be selected.

The Verification List Page will indicate if a child had a previous "Good Cause" status in CalWIN and requires an update in CalSAWS.

The user can access the immunization information by clicking on the verification hypelink labeled **Immunization**.



35 The user will be directed to the Verification Detail page. The user will note that the verification has a pending status. The Description will read **CalWIN Conversation Immunization**, an indication to the user that the immunization record previously had a **Good Cause** entry in CalWIN.

> The User will need to click on the **Immunization** tab located in the orange navigation bar to the left of the screen. Located under the **Non Financial** column.

				S	creensho	ot	
CalSAWS	Case Name: Case Number:			Journal 💟 Ta	sks 🔞 Help 间	Resources 🚺	<b>N</b> Page
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	58
Customer	Verific	ation D	etail				
Information	*- Indicat	tes required	fields				
Case Number:	Turnet						
Go	Immuniza	tions					
Person Search						-	
• Non Financial					_	Pos	stpon
Contact	Name: *			Status	*	Ser	vice:
Root Questions		SM		Pending			
Individual Demographic	· •				_		
Vital Statistics	Request	Date: *		Due Da	te: *	Dat	te Ree
Household Status	11/07/20	18		04/08/2	022		
Relationship							
Citizenship	Descripti	ion:					
Pregnancy	CalWIN C	onversion: I	mmunizatio	0			
Deemed Eligibility				-			
Residency							
Other Prog. Assist.							
Non-Compliance	Extensio	n Type		Reason			Begir
Customer Options	Interim V	enfication		60 Day			04/08
Money Mngmt	Destaura				Due Date		
Time Limits	Program				Due Date		
Purch, and Prep.	CalFresh				04/08/2022		
Immunizations	Homeless	- Perm	-	_	04/08/2022		
School Attend.	Immediat	e Need			04/08/2022		
Degrees Licenses							
Employment							
Striker							
Unempl. Depriv.							
Work Regist.							

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n Date		End Date	
8/2022		06/17/2022	
3	Received	Date	
	06/30/202	1	
	06/30/202	1	
	06/30/202	1	
		Edit	Close

**36** The user will be directed to the Immunization Status List.

Any existing Immunization records that converted over from CalWIN will be visible on this page.

The user will need to create an Immunization record for the child in order to update the status.

To add an Immunization record, the user will click the **Add** button located at the lower right side of the page.

				Scree	enshot					
	Case Number:			Journal 😨 Ta	sks 🔞 Help 🧾	Resources 🛛	Page Happin	g 🚰 Images	DCF5 Ime	ges 🚰 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer Information	Immu	nizatior	Status	List					_	
Case Number:					Display From:	7.534	To:			Continue
erson Search									)	View
Non Financial										Add
Contact	Nar	ne	Status		Begin Dat	a [		End Date		
Root Questions	No Data F	Found								
Vital Cratiatics	-							1.10		
Household Status	-									Complete
Relationship	-								-	Continue
Citizenship										Continue
Pregnancy	This Type 1	page took 0.31	9 seconds to lo	əd.						
Deemed Eligibility	-									
Residency										
Other Prog. Assist.										
Non-Compliance	-									
Customer Options	-									
Money Mngmt										
Time Limits										
Purch, and Prep.										
Immunizations										
School Attend.										

- 37 The user will be directed to the **Immunization Status Detail**, where the user will be required to:
  - 1. Select the **Child's** name from the drop down menu
  - 2. Select the Status for the immunization record
    - a. **Up to date:** This will be the primary option to indicate the child has their immunization up to date, or if the child is granted what was previously known as "**Good Cause**" in CalWIN.
    - b. **Exempt:** This status will be selected if the child meets one of the exemptions to immunization set forth by program rules and regulations.
  - 3. The user will enter a **Begin Date**
  - 4. Click Save and Return

				Scree	enshot					
Cal <b>SAWS</b>	Case Name: Case Number:		ũ	Journal 💟 Tar	aka 🔞 Help 🚺	Resources	Page Happir	ng 🎮 Images	POCFS Im	ages 🤷 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer	Immu	nization	Statu	s Detail						
Information	*- Indicat	tes required l	fields		Sav	e and Add	Another	Save and	Return	Cancel
Case Number:	Name: #									
Derror Cauch		94	V							
T Non Financial	Status:	•								
Contact	- Select -	<b>v</b>								
Root Questions	Select - Up to date									
Individual Demographic	Exempt	View								
Vital Statistics	Begin D	ate: *		End D	ate:					
Household Status					<b>E</b>				•	
Relationship					Sav	e and Add	Another	Save and	Return	Cancel
Citizenship										
Pregnancy	This Type 1	page took 0.46	seconds to A	oad.						
Deemed Eligibility										
Residency										
Other Prog. Assist.										
Non-Compliance										
Customer Options										
Money Mngmt										
Time Limits										
Purch, and Prep.										
Immunizations										
School Attend.										

**38** The user will be navigated back to the Immunization Status List, where the newly created Immunization record will display.

				Scree	enshot					
	Case Name: Case Numbert			Journal 💟 Ta	aks 🥘 Help 🗾	Resources 🧵	Page Happin	g 💌 Images 🖻	OCFS Imag	pes 🚰 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer Information	Immu	nizatior	Status	s List						
Casa Numbari	-									Continue
Go	Search I	Results Sum	mary		1				Result	ts 1 - 1 of 1
rson Search					Display					
Non Financial					From:		To:			(C)
Contact					L					View
Root Questions										Add
Individual Demographic	- N	ame		Sta	itus	Begin I	Date	End Date		
Vital Statistics			SM	Up	to date	11/07/2	2018			Edit
Household Status		_	1000	2020	51,229.5	0.0350.023	0.335			
Relationship	Remove									Add
Citizenship										Complete
Pregnancy										Continue
Deemed Eligibility	This Type 2	1 page took 0.43	t seconds to lo	ad.						3
Residency										
Other Prog. Assist.										
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Customer Options	1									
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Purch, and Prep.	1									
Immunizations										
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Steps	to C	lear	Alert
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39 In this example, the CalWORKs program is discontinued for: No Appl – Req Person

Users must include all mandatory household members in the CalFresh/CalWORKs program after conversion.

Verify all AU/HH Members have a correct **Household Status** on the bottom of the Case Summary Page

	Case Name: Case Number:		ڊ 🛄	ournal 🕎 Ta	sks 🔞 He	lp 🗐 Resourc	:es 💓 Page	e Mapping	💌 Image	es 🎮 DCFS I	(mages <mark></mark> Log Ou
	Case Info	Eligibility	Empl. Services	Child Care	Resour Databa	ce Fisca nk	al Sp	pecial Jnits	Reports	Clien Corres	ıt Admin Tool: sp.
Customer Information	CalWO	RKs ED	BC Sum	mary							
Case Number:	Begin Mo	es required f	fields End Mor	ıth	Run Da	ate	Cha Run S	inge Reas Status	on	Accept Accepte	Cancel
erson Search	10/2022				08/31/	2022	Not A	ccepted			
Financial	EDBC Inf	formation									
/erifications IC 355	Type: Re	g Type Rea:	5on:								
AGI Verifications	Program	Configurat	ion								
	System	Determinat	ion	_							
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ABAWD DBC Results	Program Program	Status: Di Status Rea	scontinued <b>ason:</b> No Ap	opl - Req Pe	rson						
	Note: Ov	erridden rov	vs are in bold	d.							
	Name	Person 1 Person 2	DC	)В	Role MEM MEM	Role Reas	son s D D	Status Discontinu Discontinu	ed N ed N Overri	<b>Status Rea</b> Io Appl - Re Io Appl - Re de Program	a <b>son</b> eq Person eq Person n Configuration
	▶ Report	ing Configu	ration								
	Work F	ligibility									

- 1. Place the cursor over **Eligibility** on the Global navigation bar and select Case Summary from the Local navigator.
- 2. Under the impacted program block, click the **View Details** button to navigate to the Program Detail page.
- 3. Click the **Edit** button in the upper righthand corner of the page to access the Program Detail page in Edit mode.
- 4. Under the Program Persons block, click the **Add** or **Reapply** button and associate the mandatory household member(s) to the program.

				Scr	eensho	ot		
CalSAWS	Case Name: Case Number:			Journal 🕎	Tasks 🔞 H	lelp 🗐 R	lesources	
	Case Info	Eligibility	Empl. Services	Child Ca	re Reso Datat	urce oank	Fiscal	
Case Summary	CalWO	RKs De	tail					
Case Number:	Date: *	es required	neids				View	/ H
Person Search	10/01/2022	🛄 🚺	ew Date					
EBT Account Search	Program	Informatio	on					
Application Registration	Status: 👌	k		5	Status Re	ason:		
Case Summary	Active							
Contact	Applicati	ion Date: <mark>*</mark>		F	RE Begin	Month:		
Authorized Representative	07/13/20	21 Edit		(	07/2021			
Application Questions	Reportin	g Type:		Month:				
Negative Action	Semi-Ann	ual Reportin	g	1	12/2021			
New Program	Automat	ically Reas	sign When	Activate	d:			
New Person	No 🗸							
Hide Person								
EBT Account List	Administ	trative Role	:5					
Issuance History	Name		Administ	rative Ro	ole	Beg	in Date	E
Auxiliary Authorization List			Primary A	pplicant/F	Recipient	09/0	1/2021	
Expungement History								
Child Support Collections			Payee			05/2	6/2021	
Time Limit Aid Summary								
Housing Support	_							
Home Visiting	Drogram	Dersons						
Legacy Case	Namo	Persons		Rolo	Rolo Ro	2600	6	tat
	Pore	on 1		Kole	KUIE KE	ason		La
ICT Summary	- Feist	-		MEM			А	cti
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Customer Contact History	Perse	on 3		MEM			D	en
SB 87	-							
Invoice History								

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Special Units	Reports	Client Corresp.	Admin Tools	
History	Save and	Return	Cancel	
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ctive			Edit	
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Now that the case updates have been made, navigate back to **Run EDBC** page to complete the eligibility determination on the program.

Confirm all required **AU/HH Members** persons have been added to the Program.

The following Job Aids are available to assist in CalSAWS:

# JA Add a Person to an Existing Case and Existing Program

Screenshot Case Name: CalSAWS 🚺 Journal 🕎 Tasks 🔞 Help 🗐 Resour Case Number: Empl. Services Case Info Eligibility Child Care Resource Databank Fiscal New / Reapplication Detail Case Summary \*- Indicates required fields Case Number: View Date: Program Type: Go 10/01/2022 CalWORKs Person Search Primary: \* Application Date: \* Reque EBT Account Search Application Registration Case Summary Cash-based Medi-Cal BDA: Contact Authorized Representative Name 🏶 DOB Role Role Application Questions Person 2 MEM Negative Action Person 3 MEM New Program Person 1 MEM New Person Hide Person EBT Account List This Type 1 page took 0.41 seconds to load. Issuance History Auxiliary Authorization Lis Expungement History

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40 Once all data collection pages have been updated, the User can run EDBC, review and accept program determinations, and save the new EDBC results.

> Review and send any applicable Notices of Action. If the NOA is not reviewed it will go out due to an overnight batch process. Journal the action taken according to county policy.

Navigate back to the Case Summary page.

The case review is complete!

				Scree	nshot					
Cal <b>SAWS</b>	Case Name: Case Number:		m	Journal 🕎 Tas	ks 🔞 Help 📋	Resources	🌒 Page Mappin	g 🎮 Images	💌 DCFS Imag	jes 🚰 Log Out
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Case Summary	Case S	ummar	у							
Case Number:	Case Na	Case Name County								
Person Search EBT Account Search	- Compa	nion Cases								
Application Registration Case Summary	Case Nu	ımber				Case Nan	ne			Add
Contact										
Authorized Representative Application Questions Negative Action	Display:	🔲 🖬 Vie	w	Yellov	v Bar	nner	clear	ed!		