Yellow Banner Case Review Report
Mismatch Reasons, Priorities and Scenarios

Background
During the conversion cutover from CalWIN to CalSAWS, the system will run a Batch EDBC job for April 2023 on 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.

However, the flagged cases will require further case review by a Case Worker to determine the difference in the EDBC results and make appropriate case updates to resolve the issue.

Post Go-Live, CalSAWS users across all CalWIN Counties may see a yellow case banner on active cases due to an EDBC Mismatch. The CalSAWS Project will provide the Counties with a listing of impacted cases with the associated EDBC Mismatch Reason, along with a guide on county actions that can be taken to clear the Yellow Banners.

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

Batch EDBC will not be run on these cases until the User performs the case review, takes appropriate action, accepts, and saves EDBC.

Mismatch Reasons and Priorities

Mismatch Reason	Description	Priority
Program Discontinued	When EDBC is run in CalSAWS, active Programs in the CalWIN System are resulting in a Program Discontinuance in CalSAWS.	1
Recoupment Mismatch	When EDBC is run in CalSAWS, the Recoupment amount in CalSAWS differs from what was determined in the CalWIN System.	1
Program Person Status Mismatch	When EDBC is run in CalSAWS, the Program Person Status does not match what was determined in the CalWIN System.	1
Cash Program not Authorized	When EDBC is run in CalSAWS, the Cash Program fails due to a mismatch; therefore, the associated CalFresh (CF) Program also fails.	1
Program Person Role Mismatch	When EDBC is run in CalSAWS, the Program Person Roles are mismatched (such as MEM, UP, FRE, or FRI) between converted CalWIN EDBC and CalSAWS run EDBC.	2
Benefit Amount Mismatch	When EDBC is run in CalSAWS, the Benefit Amount does not match with what previously determined in the CalWIN System.	3
Aid-Code Mismatch	When EDBC is run in CalSAWS, the Aid Code does not match with what was determined in the CalWIN System.	3
Prior Or Current EDBC Not Found	EDBC run in CalSAWS is unsuccessful due to no Prior or Current EDBC result to compare against in the CalWIN System.	3

Mismatch Reason	Description	Priority
MAGI Determination Pending	Based off the last CalWIN MAGI eligibility determination on the DER, the EDBC run in CalSAWS results in MAGI Determination Pending for an individual(s).	3
Full Case Review	EDBC run in CalSAWS is resulting in an uncategorized mismatch reason.	3

NOTE: *All Foster Care, Kin-GAP, and AAP related items may be found under the Appendix:* ***Required Actions for Foster Care, Kin-Gap and Adoption Assistance Program***

Generally, batch EDBC will **not** be run on Yellow Banner cases. However, some Negative Action Batch jobs **will** still apply to these cases, as appropriate.

Counties were given the option to Opt In or Opt Out* of some of these Batch jobs. Previous Opt In/Out decisions made via CRFI were reconfirmed with each county prior to Go-Live. The table below shows a list of the county Negative Action Batch jobs that applies to all counties, as well as any Opt In/Opt Out jobs elected by each county.

Negative Action Batch Jobs that will run for all counties	County elected Opt In/Opt Out Batch Jobs – DDID 1110*
CalWORKs RE Discontinuance	CalWORKs 60 Month Time Limit Discontinuance
CalFresh RE Discontinuance	RCA Discontinuance
SAR7 Due Discontinuance	Postponed Verification Past Due for Expedited CalFresh
TNB RE Due	Deny CalFresh for Missed Interview
MAGI Medi-Cal Discontinuance	
Medi-Cal RE Discontinuance	
CAPI RD Not complete	
CalWIN EICT Inbound Disposition Received	

These cases should be reviewed prior to the Negative Batch run to avoid program and/or case discontinuance.

Throughout the year, the CalSAWS system runs various Cost of Living Adjustments (COLA) batch jobs. A review of cases with Yellow Banners should be performed before the next COLA run. If users review the Yellow Banner cases and run EDBC on-line prior to the next COLA run, the system will apply the COLA run values automatically. If the review is **not** completed prior to the COLA run, users will have to apply the COLA increase _manually_. A separate CIT will be sent to

the counties after each COLA run, identifying these cases. The table shown below is a list of COLA runs that could potentially impact Yellow Banner cases.

COLA List
(Dates are subject to change)

Release #/ Priority Release	Targeted Release Date	CalSAWS Production Deployment Date	COLA Multiple Day Processing	Notes
22.12.03	**12/4/2022**	12/3/2022		2023 CAPI COLA (CA-242903)
23.02.11	**2/12/2023**	2/11/2023		Batch COLA - 2023 CF SSI COLA (CA-243012)
23.02.25	**2/26/2023**	2/25/2023		Rate Increase - 2023 FPL for Medi-Cal (CA-242754)
23.03.04	**3/5/2023**	3/4/2023	Yes	Batch COLA - 2023 FPL (CA-242755)
23.06.10	**6/11/2023**	6/10/2023		Rate Increase - MBSAC and IIK COLA 2023-2024 (CA-243011)
23.08.03	**8/4/2023**	8/3/2023		Rate Increase - AAP CNI Rate Increase 2023-2024 (CA-243008) Rate Increase - FC, KG CNI Rate Increase 2023-2024 (CA-243006)
23.08.12	**8/13/2023**	8/12/2023		Batch COLA - AAP CNI Rate Increase 2023-2024 (CA-243010) Batch COLA - FC, KG CNI Rate Increase 2023-2024 (CA-243007)
23.08.31	**9/1/2023**	8/31/2023	Yes	Rate Increase - 2023-2024 CF COLA; CW MAP 2023-2024 (CA-243002)

Release #/ Priority Release	Targeted Release Date	CalSAWS Production Deployment Date	COLA Multiple Day Processing	Notes
23.09.09	**9/10/2023**	9/9/2023		Batch COLA - 2023-2024 CF COLA; CW MAP (CA-243001)
23.12.02	**12/3/2023**	12/2/2023		Rate Increase -2024 SSA COLA (CA-242762)
23.12.07	**12/8/2023**	12/7/2023		Rate Increase - 2024 CAPI COLA (CA-243003)
23.12.09	**12/10/2023**	12/9/2023		Batch COLA - 2024 SSA COLA (CA-242763)
23.12.16	**12/17/2023**	12/16/2023		Batch COLA 2024 CAPI COLA (CA-243004)