

Full Case Review

Priority Level: 3

Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care

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 is run in CalSAWS, if the last saved CalWIN EDBC benefit result that was determined in the CalWIN system does not match the converted CalSAWS EDBC benefit result. Run EDBC in CalSAWS to find the benefit amount mismatches and compare to the last saved converted CalWIN EDBC. Based on the differences, Users will need to verify the new CalSAWS results, update the data collection records, if applicable, take action based on county policy and authorize the EDBC results.

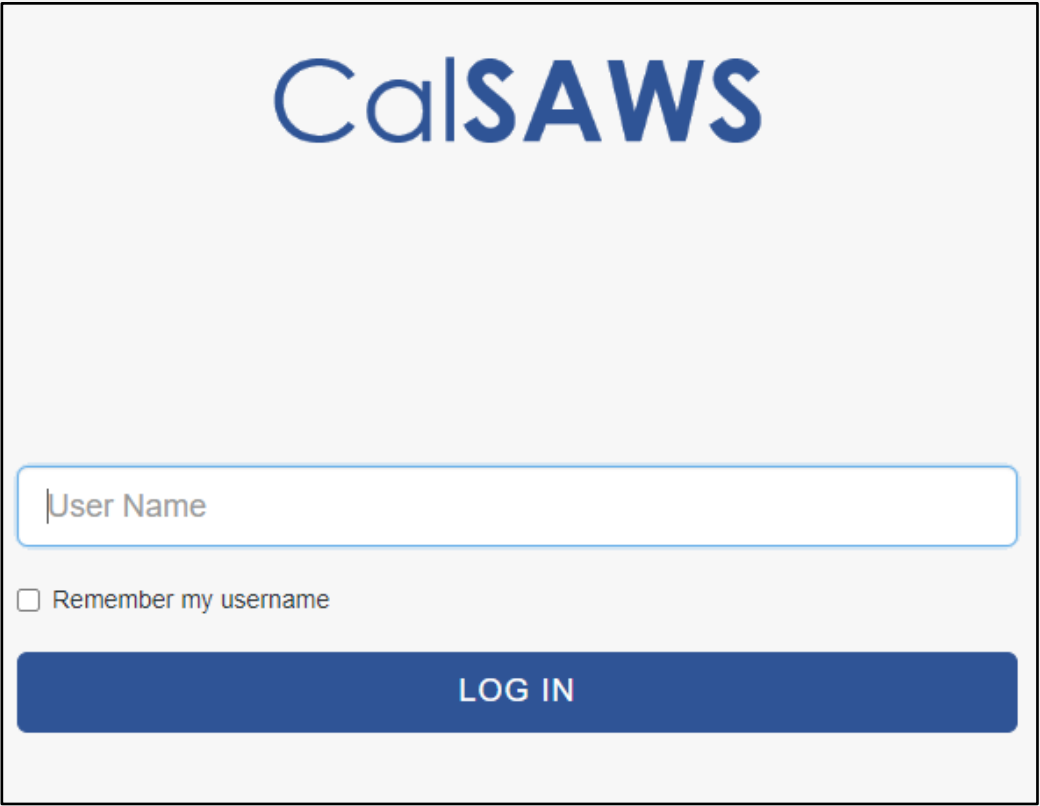
These cases will be identified in the **Conversion EDBC Case Review Report** as follows:

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_INCOME	SSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalFresh	Full Case Review	11/30/2022		3		

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 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

Full Case Review

Steps To Clear Alert		Screenshot
1	Log in to CalSAWS by entering your Username and Password	

Steps To Clear Alert		Screenshot
2	<div>On the Homepage:</div> <div>1. Enter the case number and click on the submit button to be directed to the Case Summary page.</div> <div><div>★</div><div>Note: This step is not necessary if already in the Case Summary page for the desired case</div></div> <div><div>★</div><div>Note the Yellow Banner on the Case Summary Page</div></div>	<div></div> <div></div>

3

On the Case Summary Page:

1. Click on the **Eligibility** tab on the Global Navigator

2. Click on the **Customer Information** link on the Local Navigator

Screenshot

CalSAWS

Case Name:

Case Number:

JournalTasksHelpResourcesPage MappingImagingLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number: Go

Person SearchEBT Account SearchApplication RegistrationCase Summary

Case S

Workload Inventory

Case Summary

Customer Information

Reporting

Compa

Customer Schedule

Images

Capture

Generate Coversheet

County

Case Name

CalSAWS

Case Name:

Case Number:

JournalTasksHelpResourcesPage MappingImagingLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person SearchNon FinancialFinancialGA/GRVerificationsMC 355EBT Account ListMAGI VerificationsMAGI EligibilityRun EDBCManual EDBC

Contact Summary

Continue

Search Results SummaryResults 1 - 8 of 8

DisplayFrom: To: View

Search Address

Address Information

Person	Type	Address	Begin Date	End Date	
	Mailing				EditView History
					Edit

From the Contact Summary page:

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

Steps To Clear Alert

- 4
- On the Run EDBC page:
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.
- 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 cannot be run without the appropriate updates made to the data collection pages.
- When experiencing a **Soft Validation**, EDBC can still be run without making changes to the data collection pages. Follow your county policy.
- ★

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

Screenshot

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Run EDBC

* - Indicates required fields

Change ReasonRun EDBC3Cancel

Benefit Processing Range:

Begin Month: *End Month: *

07/2022207/2022

ProgramStatusTimely Notice ExceptionReasonRun Reason

Medi-CalActive

CalWORKsActive

CalFreshActive

Change ReasonRun EDBCCancel

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Run EDBC

* - Indicates required fields

Change ReasonRun EDBC w/o VerificationsCancel

Benefit Processing Range:

Begin Month: *End Month: *

07/2022207/2022

ProgramStatusTimely Notice ExceptionReasonRun Reason

CalWORKsActive

CalFreshActive

Medi-CalActive

The following verification(s) have not been received:

To run EDBC without these verifications, click on the "Run EDBC w/o Verifications" button.

Page 5

Steps To Clear Alert

5 Compare the benefit amount mismatch details with the last CalWIN **Conversion** EDBC run.

Users will need to identify any mismatches in the following areas: income, household size, living expenses, Other Program Assistance (OPA), Non-compliance/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 CalWORKs Budget by first clicking the **CalWORKs link for 02/2022** and compare it against the new CalWORKs Budget by clicking the **CalWORKs link for 7/2022**.

Screenshot

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

EDBC List

Display by: Program: Type Reason: Run Status: From: To: Cancel

View

Search Results SummaryResults 1 - 6 of 6

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
02/2022		CalWORKs	Regular	Accepted - Saved	579.00	01/11/2022	Conversion
02/2022		CalFresh	Regular	Accepted - Saved	414.00	01/12/2022	Conversion
02/2022		Medi-Cal	Regular	Accepted - Saved	Details	01/11/2022	Conversion
07/2022		CalWORKs	Regular	Not Accepted	733.00	06/10/2022	Online EDBC Rules
07/2022		CalFresh	Regular	Not Accepted	459.00	06/10/2022	Online EDBC Rules
07/2022		Medi-Cal	Regular	Not Accepted	Fail	06/10/2022	Online EDBC Rules

Steps To Clear Alert

In the CalWORKs Budget block, staff can quickly review, compare, and find any **Unearned Income**, **Earned Income** and **MAP Family Unit Size** discrepancies. Users can click on the hyperlinks to view income used in the EDBC budget.

In the side-by-side example to the right, the **biggest** discrepancy between the converted CalWORKs Budget and the newly run 07/2022 CalWORKs Budget is in **MAP Family Unit Size**.

Staff should begin by reviewing all reported and verified household changes in the case.

★ **Note:** This side-by-side comparison view is for example purposes only and is not a default view within CalSAWS.

Screenshot

02/2022 CalWORKs Budget - Converted				07/2022 CalWORKs Budget – Online EDBC			
CalWORKs Budget		Regular		CalWORKs Budget		Regular	
Unearned Income	←→	\$	0.00	Unearned Income	←→	\$	0.00
Unearned Income Disregards		-	0.00	Unearned Income Disregards		-	0.00
Net Unearned Income		=	0.00	Net Unearned Income		=	0.00
Earned Income	←→	\$	0.00	Earned Income	←→	\$	0.00
Earned Income Disregards		-	0.00	Earned Income Disregards		-	0.00
Net Earned Income		=	0.00	Net Earned Income		=	0.00
Total Net Nonexempt Income		\$		Total Net Nonexempt Income		\$	0.00
MAP Family Unit Size	←→		1	MAP Family Unit Size	←→		2
Family MAP	←→	\$	579.00	Family MAP	←→	\$	733.00
Family MAP Test			Pass	Family MAP Test			Pass
Family Special Needs		\$	0.00	Family Special Needs		\$	0.00
Potential Grant	←→	\$	579.00	Potential Grant	←→	\$	733.00
Assistance Unit Size	←→		1	Assistance Unit Size	←→		2
Assistance Unit MAP		\$		Assistance Unit MAP		\$	733.00
Assistance Unit Special Needs		\$	0.00	Assistance Unit Special Needs		\$	0.00
Aid Payment	←→	\$	579.00	Aid Payment	←→	\$	733.00

Steps To Clear Alert

The screenshots to the right display the CalFresh EDBC Summary. Staff can quickly view:

- Semi-Annual Reporting Period Begin Month
- System Determination EDBC Source
- Aid Code
- Program Status

★ **Note:** This side-by-side comparison view is for example purposes only and is not a default view within CalSAWS.

Screenshot

CalFresh EDBC Summary

* Indicates required fields

Close

Begin Month	End Month	Run Date	Run Status	Accepted By
02/2022		01/12/2022	Accepted - Saved	

EDBC Information

Semi-Annual Reporting Period Begin Month:

Reporting Type Reason:

Type: Regular

Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Conversion

Aid Code: 09 - CalFresh

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Active	
		MEM		Denied	Out of the Home
		MEM		Denied	Out of the Home
		MEM		Active	

CalFresh EDBC Summary

* Indicates required fields

Change Reason

Accept

Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/11/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin Month:

Reporting Type Reason:

Type: Regular

Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 30 - CW-All Other Families (Fed)

Program Status: Active

SUAS Eligible: Yes

Program Type: Regular

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Active	
		MEM		Active	

Override Program Configuration

Steps To Clear Alert

In the Gross Income Eligibility block, staff can quickly review, compare, and find any **Unearned Income**, **Earned Income** and **Household size** discrepancies.

In the Net Income Eligibility block, staff can quickly review, compare, and find any **Excess Shelter Costs and Deduction** discrepancies.

Staff should review all reported and verified **Earned** and **Unearned Income** in the case.

★ **Note:** This side-by-side comparison view is for example purposes only and is not a default view within CalSAWS.

Screenshot

Gross Income Eligibility				Gross Income Eligibility			
		Regular				Regular	
Unearned Income	↔	\$	0.00	Unearned Income	↔	\$	733.00
Earned Income		+	0.00	Earned Income	↔	+	0.00
Total Gross Nonexempt Income		=	0.00	Total Gross Nonexempt Income		=	733.00
Household Size			2	Household Size			2
Maximum Gross Income		\$	0.00	Maximum Gross Income		\$	0.00
Result	↔		Pass	Result	↔		Waived
Net Income Eligibility				Net Income Eligibility			
		Regular				Regular	
Unearned Income		\$	733.00	Unearned Income		\$	733.00
Earned Income	↔	+	0.00	Earned Income	↔	+	0.00
Deductions	↔	-	177.00	Deductions	↔	-	177.00
Total Adjusted Income		=	556.00	Total Adjusted Income		=	556.00
Excess Shelter Costs		\$	409.00	Excess Shelter Costs		\$	609.00
Maximum Shelter Allowance		\$	597.00	Maximum Shelter Allowance		\$	597.00
Allowed Shelter Costs	↔	\$	278.00	Allowed Shelter Costs	↔	\$	597.00
Total Net Nonexempt Income		=	147.00	Total Net Nonexempt Income		=	0.00
Household Size	↔		2	Household Size	↔		2
Maximum Net Income		\$	1,452.00	Maximum Net Income		\$	0.00
Result			Pass	Result			Waived

Steps To Clear Alert

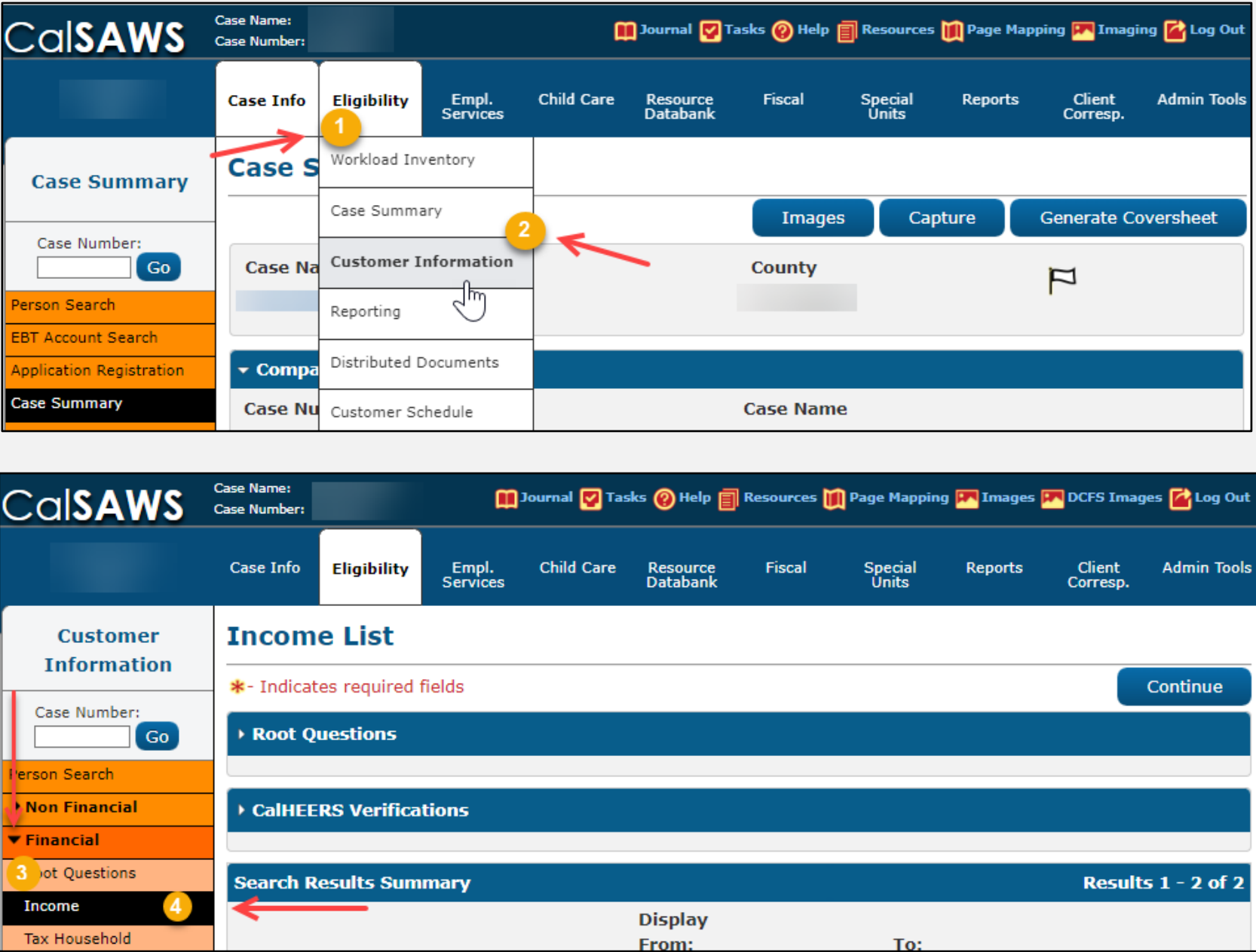
- 6
- For income discrepancies and/or review:
1. Click on the **Eligibility** tab on the **Global navigation** bar

2. Select **Customer Information** from the **Local** navigator.

3. To expand the **Financial** section, click on the carrot in the **Task** navigation.

4. Click on the **Income** link on the **Task** navigation bar.

Screenshot



Steps To Clear Alert

For Income Categories, Income Types, Adding, Editing, Viewing, or Removing all income for all persons associated to the case, refer to Job Aid: **JA Income Categories and Types in the System.**

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

CalSAWS Quick Guide: Potentially Available Income (needs updating, contains C-IV references)

CalSAWS Quick Guide: Sponsorship and Deemed Income (needs updating, contains C-IV references)

JA Foster Care Income and Property Detail Page

JA Medi-Cal – Income In-Kind – Unearned

JA SSIAP – SSI (Disability)

Screenshot

CalSAWS

Case Name:

Case Number:

Journal

Tasks

Help

Resources

Page Mapping

Images

DCFS Images

Log Out

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Customer Information

Case Number:

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

Income List

*- Indicates required fields

Continue

Root Questions

CalHEERS Verifications

Search Results Summary

Results 1 - 2 of 2

Display From: To:

Name	Category	Type	Source	Begin Date	End Date	
<input type="checkbox"/>	Earnings	Salary, Wages				<input type="button" value="Edit"/> <input type="button" value="View History"/>
<input type="checkbox"/>	Earnings	Salary, Wages				<input type="button" value="Edit"/> <input type="button" value="View History"/>

Income Category: *

Child/Spousal Support

Disability

Earnings

Educational, Student

Government Settlements, Payments, Programs

IHSS

Income In-Kind - Earned

Income In-Kind - Unearned

Insurance, Legal Settlement, Third Party

Interest, Dividends, Investments

Loans, Gifts, Contributions

Military Dependent

Miscellaneous

Native American

Railroad

Reimbursements

Rental of Land, Buildings, Personal Property

This page took 0.36 seconds to load.

Steps To Clear Alert

In some Full Case Review scenarios, there may be an increase in earned/unearned income. To review or correct any Income discrepancies, navigate to the **Income List Page** under the Financial tab:

- 1. Navigate from the **Income List Page**
- 2. Click on the blue, hyperlinked **Customer name**.

Review income amounts, active/discontinued Programs, Begin and End Dates. Correct any discrepancies, if needed.

Screenshot

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Income Detail

*- Indicates required fields

NextEditClose

Name: *2

Category: Earnings

Employment:

Frequency: * Monthly

Description: CalWIN Conversion Income Type: Earnings, wages, salaries, bonuses, commissions, military pay|| EMPLOYER BUSINESS NAME: Defense Finance Millitary

Shared with RDP

Pickle Eligibility

Income Amounts *

Display Program: *From: 07/2022To: 07/2022View

Program	Amount	Begin Date	End Date
Cash / CalFresh	396.40		
Medi-Cal	396.40		
Actuals (TMC / Pickle)	396.40		

- 7
- Steps for Household composition discrepancies:
- Review the **Gross Income Eligibility block** and correct any **Household size** discrepancies in the case, if applicable. (Refer back to **Step 5** to find Household Size in the Gross Income Eligibility block)

Review all active Household members within the Program Configuration section of the budget. Ensure appropriate household members are **all listed** and show **active** on the case.

Ensure that all Household members who Purchase and Prepare together are listed on the **Purchase and Prepare** Detail Page.

New IRT Calculation

Categorically Eligible: Yes

SUAS Eligible: Yes

Eligible for Expedited Service: No

Public Assistance: Yes

Restaurant Meals: No

Meets ESAP Criteria: No

Modified Categorical Eligibility: No

Property Eligibility	Regular
Data Month Property:	\$ 25.00
Benefit Month Property:	\$ 25.00
Property Limit:	\$ 2,500.00
Result:	

Gross Income Eligibility	Regular
Unearned Income	\$ 733.00
Earned Income	+ 0.00
Total Gross Nonexempt Income	= 733.00
Household Size	2
Maximum Gross Income	\$ 0.00
Result	Waived

Net Income Eligibility	Regular
Unearned Income	\$ 733.00
Earned Income	+ 0.00
Deductions	- 177.00
Total Adjusted Income	= 556.00
Excess Shelter Costs	\$ 609.00
Maximum Shelter Allowance	\$ 597.00
Allowed Shelter Costs	\$ 597.00

Steps To Clear Alert

To add, edit or view household status information for all individuals associated to the case:

- 1. Place the cursor over **Eligibility** on the **Global navigation bar**.
- 2. Select **Customer Information** from the **Local navigator**.
- 3. Click on the **Household Status** link on the **Task navigation bar** to access the **Household Status List** page.

Refer to the following Job Aid available via the **Help Icon** on the Utility Navigator: **Household Status Detail**

To add a person that exists in CalSAWS/to add a person that does not exist in CalSAWS:

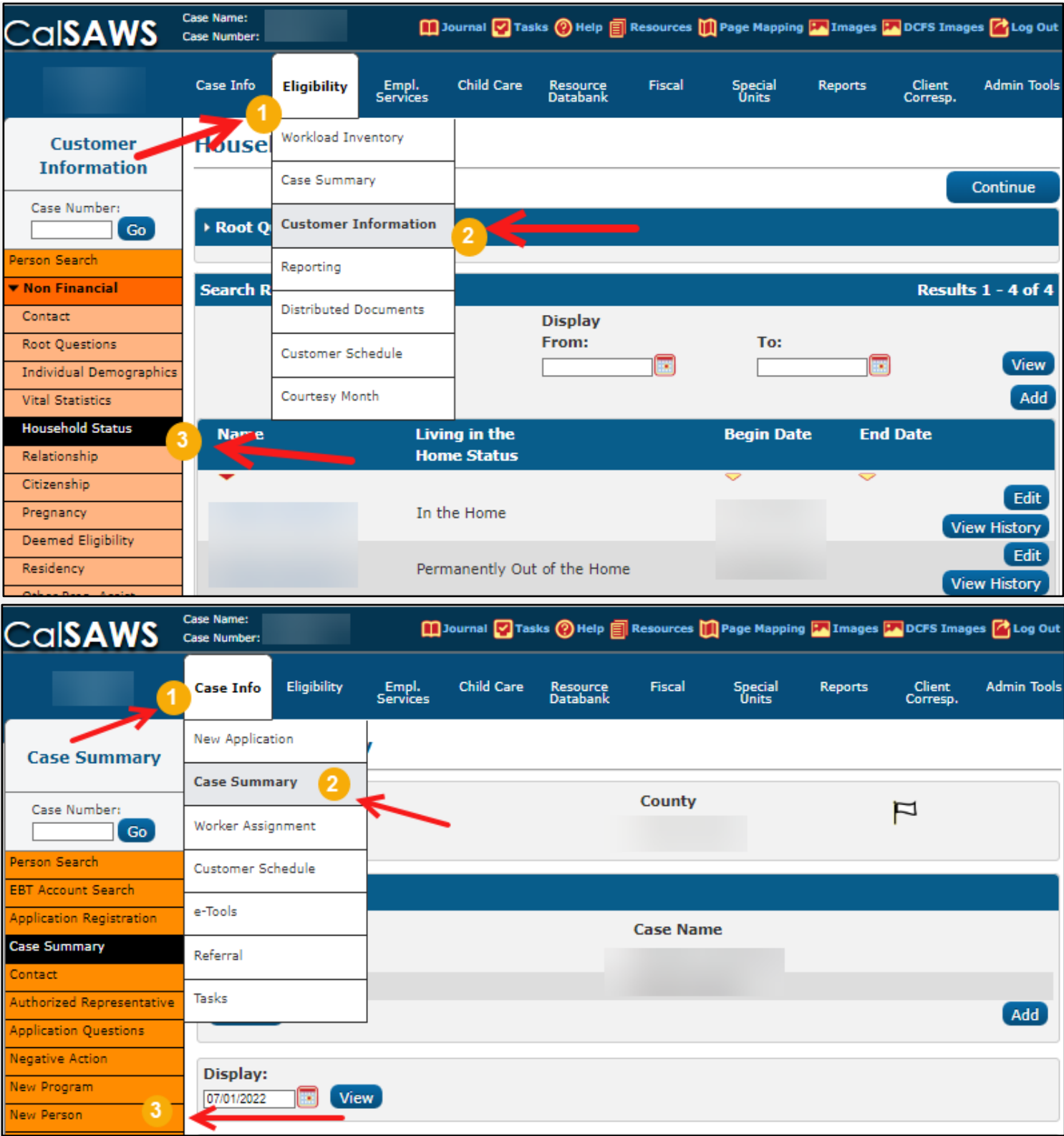
- 1. Place the cursor over **Case Info** on the **Global navigation bar**.
- 2. Select **Case Summary** from the **Local navigator**.
- 3. Expand the **New Person** link on the **Task navigation bar**.

Refer to the following Job Aid available via the **Help Icon** on the Utility Navigator: **JA Add a Person to an Existing Case and Existing Program**

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

Duplicate Persons (CIN) – Identify and Document

Screenshot



Steps To Clear Alert

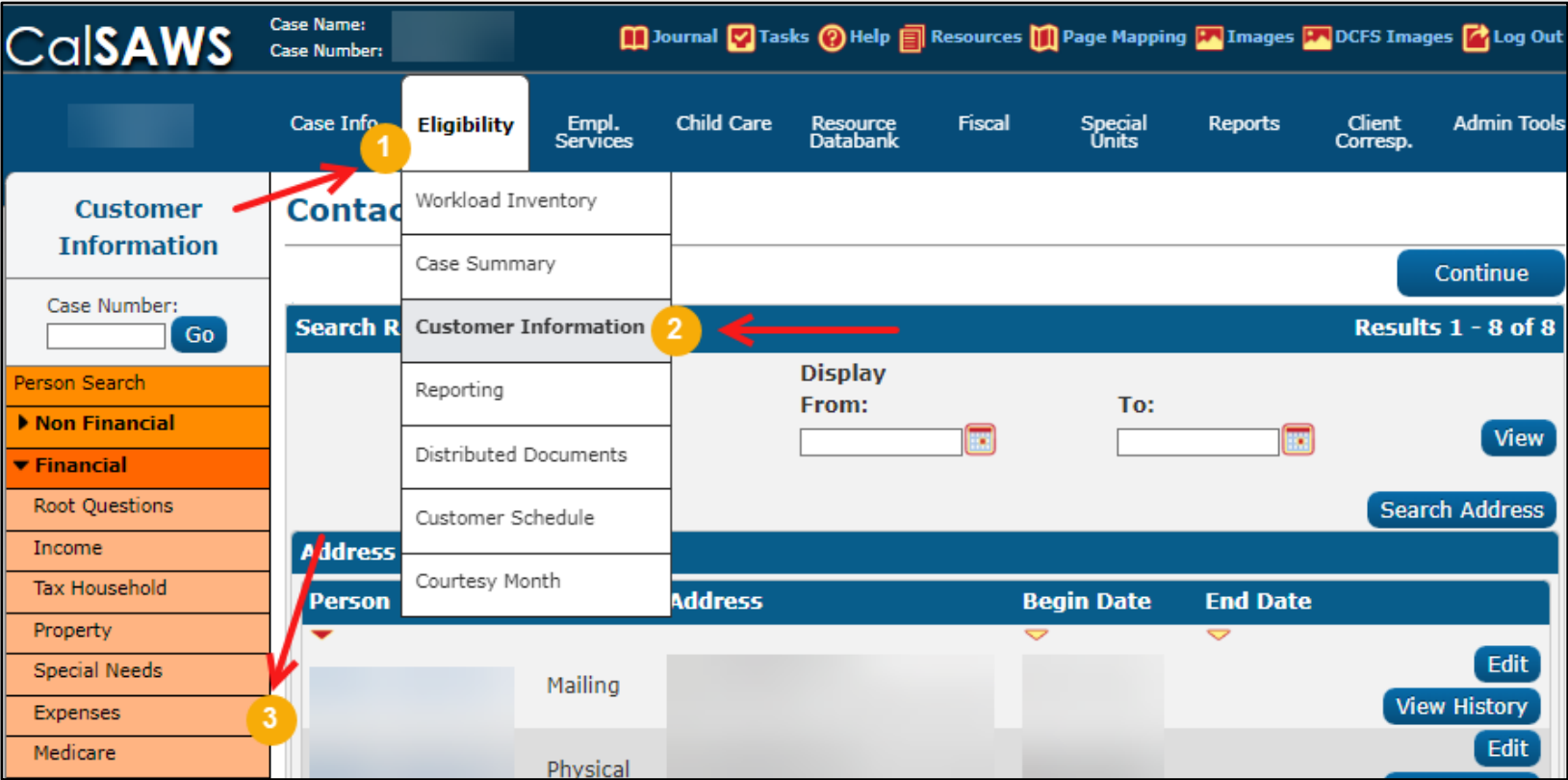
8 To correct any Living Expense discrepancies, navigate to the **Expense Amount Detail** page.

- 1. Click on the **Eligibility** tab on the **Global navigation** bar.
- 2. Select **Customer Information** from the **Local** navigator to expand the **Financial** link on the **Task** navigation bar.
- 3. Click on the **Expenses** link.

To view, add, or edit the details of an expense, refer to the following Job Aid located in the **Help Icon** on the Utility Navigator: **JA Expense Management**

- Expense Categories
- Expense List Page
- Complete Expense Detail Page
- Add/Edit Self-Employment Expense
- Add/Edit SUA/LUA/TUA
- Add/Edit Shelter/Utility Expense
- Shared Expenses

Screenshot



Steps To Clear Alert

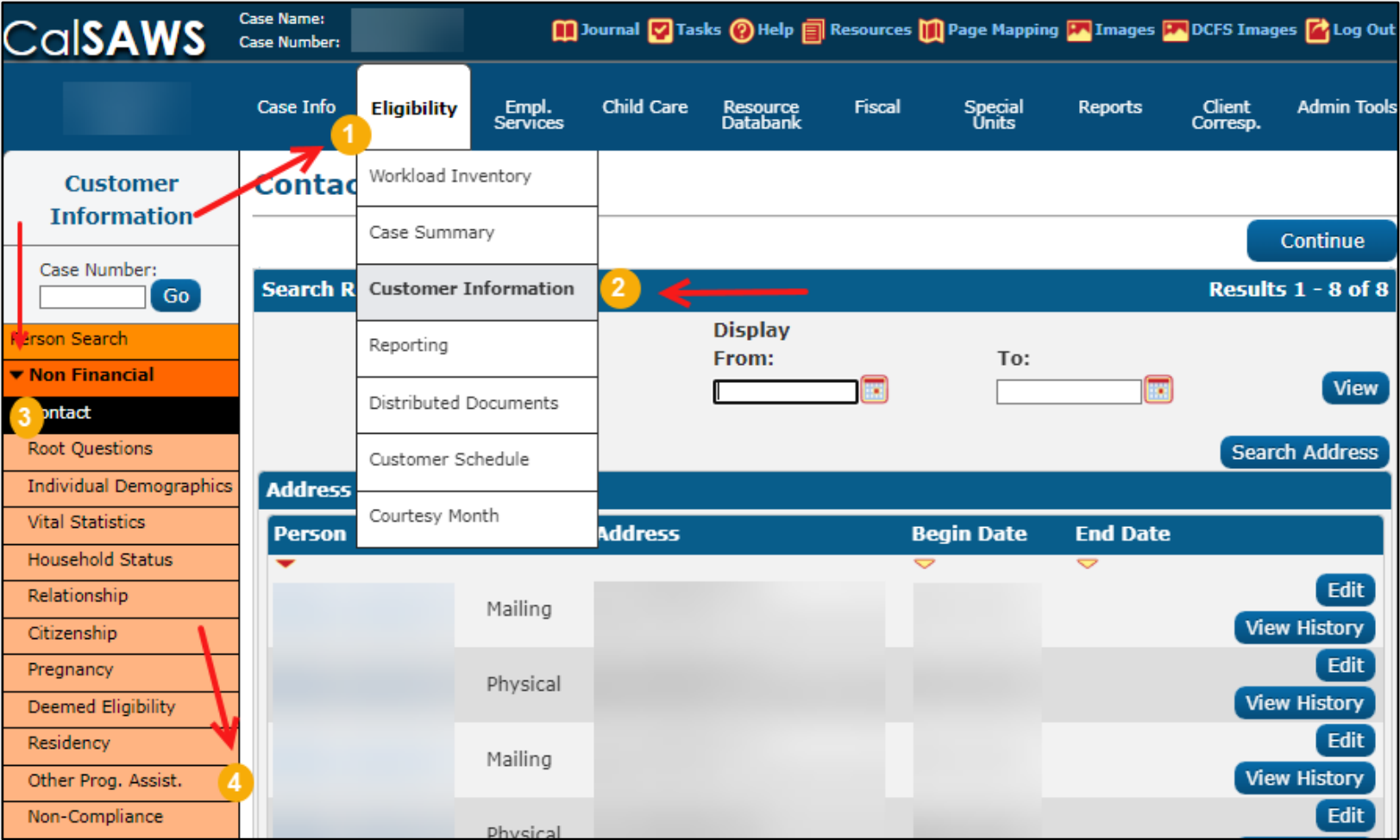
9 For Other Program Assistance (OPA) discrepancies, navigate to the Other Program Assistance Detail page:

★ **OPA** – when an applicant receives benefits or assistance from another program such as: Adoption Assistance Program, Adult Protective Services, CAPI, Cal-Learn, SSI/SSP, etc.

- 1. Click on the **Eligibility** tab on the **Global navigation** bar.
- 2. Select **Customer Information** from the **Local** navigator.
- 3. Expand on the **Non-Financial** link in the **Task** navigation bar.
- 4. Click the **Other Program Assistance** link on the **Task navigation** bar.

To view, add, or edit the details of an expense, refer to the following Job Aid located in the **Help Icon** on the Utility Navigator: **JA Other Program Assistance (OPA) Detail Page**

Screenshot



Steps To Clear Alert

- 10
- To view and/or correct any Non-compliance, Sanctions or Penalty discrepancies on a case:
1.

Place cursor over **Eligibility** on the **Global** navigation bar.
2.

Select **Customer Information** from the **Local** navigator.
3.

Click the **Non-Compliance** link within the **Non-Financial** dropdown pane in the task navigation bar.

Screenshot

CalSAWS

Case Name:
Case Number:

JournalTasksHelpResourcesPage MappingImagingLog Out

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Customer Information

Case Number:
 Go

Person Search

Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Contact

Workload Inventory

Case Summary

Customer Information

Reporting

Distributed Documents

Customer Schedule

Courtesy Month

Search Results

Display From:

To:

View

Search Address

Results 1 - 6 of 6

Continue

Person	Address	Begin Date	End Date	
	Mailing	08/01/2022		Edit View History
	Physical	08/01/2022		Edit View History
	Mailing	08/01/2022		Edit View History
	Physical	08/01/2022		Edit View History

Steps To Clear Alert

- 11
- To view and correct and benefit discrepancies that may arise from a Household member being penalized for "Refused to Assign Supp Rights:"

Screenshot

CalSAWS

Case Name:
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:
 Go

Person Search

▶ Non Financial

▶ Financial

▶ Kin-GAP

▶ GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

▶ ABAWD

EDBC Results

CalWORKs EDBC Summary

*- Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
10/2022		08/31/2022	Not Accepted	

EDBC Information

Annual Reporting Period Begin Month: 07/2022

Reporting Type Reason: Child Only

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 33 - CW-Zero Parent (Fed)

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
<u>10M</u>		MEM		Active	
<u>35F</u>		FRI	Refused Assign Supp Rights	Active	
<u>9M</u>		MEM		Active	

Override Program Configuration

Steps To Clear Alert

- 1. Place the cursor over **Eligibility** on the Global navigation bar.
- 2. Select **Customer Information** from the Local navigator.
- 3. Click the **Absent Parents** link on the Task navigation bar to access the Absent/Unmarried Parent List page.
- 4. Click the **Name** hyperlink, the **Add** button or the **Edit** button to access the Support Questionnaire page in View, Add, or Edit mode, respectively.
- 5. Review the information to determine if the support rights information is correct. If this information must be changed, select either the **Edit** button to update the existing entry, or the **Add** button to add a new entry.
- 6. Click **Save** to confirm any updates.

Screenshot

CalSAWS

Case Name:
Case Number:

Journal

Tasks

Help

Resources

Page Mapping

Images

DCFS Images

Log Out

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

SUPPORT ENFORCEMENT SERVICES (MEDI-CAL ONLY)

Do you want other child support enforcement services?
No

Certification and Agreement

Assign Child/Spousal Support Rights

Type	Begin Date	End Date
I refuse to assign child/spousal support rights	07/01/2015	07/07/2016
I refuse to assign child/spousal support rights	07/08/2016	01/02/2018
I refuse to assign child/spousal support rights	01/03/2018	

Assign Medical Support Rights

Type	Begin Date	End Date
I refuse to assign medical support rights	07/01/2015	07/07/2016
I refuse to assign medical support rights	07/08/2016	01/02/2018
I refuse to assign medical support rights	01/03/2018	

Child Support Cooperation

Type	Begin Date	End Date
Do not agree to cooperate	07/01/2015	07/07/2016
Do not agree to cooperate	07/08/2016	01/02/2018
Do not agree to cooperate	01/03/2018	

Generate Form

Edit

Close

Steps To Clear Alert

12 To view and correct CalFresh benefit discrepancies that arise from” **Foster Care Transitional Housing Payments**” being counted toward CF EDBC results:

Users will need run EDBC for the Foster Care and CalFresh Programs in a specific sequence.

Converted EDBC’s may not be populating the **Transitional Housing Benefit** Amount, and thus the income is not excluded from the CF case. EDBC’s for the come-up month exclude that amount as expected.

Review and compare details within the **Unearned Income** hyperlink to review the type and amount of Foster Care income used in CF budgeting.

Access the active **Foster Care** case of the HH member feeding into the CalFresh budget and **run EDBC for the Foster Care Program separately** to determine the appropriate Foster Care payment rate and type.

Accept and Save the Foster Care EDBC results before navigating back to the CalFresh Case to run EDBC with the appropriate payment levels and types.

(An override may ultimately be needed to correct the benefit amount.)

Screenshot

Gross Income Eligibility		Regular
Unearned Income	\$	0.00
Earned Income	+	0.00
Total Gross Nonexempt Income	=	0.00
Household Size		5
Maximum Gross Income	\$	0.00
Result		Pass

Net Income Eligibility		Regular
Unearned Income	\$	2,475.00
Earned Income	+	0.00
Deductions	-	215.00
Total Adjusted Income	=	2,260.00
Excess Shelter Costs	\$	802.00

Gross Income Eligibility		Regular
Unearned Income	\$	3,734.00
Earned Income	+	0.00
Total Gross Nonexempt Income	=	3,734.00
Household Size		5
Maximum Gross Income	\$	5,412.00
Result		Pass

Net Income Eligibility		Regular
Unearned Income	\$	3,734.00
Earned Income	+	0.00
Deductions	-	225.00
Total Adjusted Income	=	3,509.00

EDBC Person Line Item Detail - Unearned Income

Name	Type	Description	Amount
12F	Child Support - Direct	CalWIN Conversion: Source Income Type: Child/Spousal Support Direct From A/P or DA	\$ 337.50
8M	Child Support - Direct	CalWIN Conversion: Source Income Type: Child/Spousal Support Direct From A/P or DA	\$ 337.50
3F	Other Unearned All	CalWIN Conversion: Source Income Type: May Cash Benefit	\$ 1,125.00
37F	Spousal Support - Direct	CalWIN Conversion: Source Income Type: Alimony - Spousal Support	\$ 337.50
16F	Child Support - Direct	CalWIN Conversion: Source Income Type: Child/Spousal Support Direct From A/P or DA	\$ 337.50
Total			\$ 2,475.00

EDBC Person Line Item Detail - Unearned Income

Name	Type	Description	Amount
12F	Child Support - Direct	(10/01/2022) \$337.50	\$ 337.50
37F	Spousal Support - Direct	(10/01/2022) \$337.50	\$ 337.50
8M	Child Support - Direct	(10/01/2022) \$337.50	\$ 337.50
16F	Child Support - Direct	(10/01/2022) \$337.50	\$ 337.50
13F	Foster Care	08/2022 EDBC run 07/09/2022	\$ 2,384.00
Total			\$ 3,734.00

Run EDBC

*- Indicates required fields

Change Reason

Run EDBC

Cancel

Benefit Processing Range:

Begin Month: *

10/2022

End Month: *

10/2022

Program	Status	Timely Notice Exception	Reason	Run Reason
Foster Care	Active			

Change Reason

Run EDBC

Cancel

Steps To Clear Alert

13 To view and correct Full Case Review Banners resulting from a **CalWORKs child receiving Child Support requesting exclusion** due to Senate Bill 380 (MMO - Medi-Cal Member Only Role):

Users will need to review the **Income List** in the case to ensure that the child requesting exclusion has an Income record for **Child Support** received.

The **Customer Options** page allows you to specify which child(ren) is being excluded from the CalWORKs MAP determination.

Navigate to **Customer Options** link in the task navigation pane and select the record of the **Optional Child** to review and ensure the appropriate options have been set. Failure to do so may result in incorrect benefits being issued.

In **Customer Options Detail** page:

- 1. Select: **Optional Child – Receives Child Support**
- 2. Indicate whether the child is stepsibling/half-sibling of an eligible CW AU member
- 3. Indicate whether a court order for support exists, and indicates a specific support amount per child
- 4. Click **Save and Return**, then navigate back to Run EDBC.

EDBC will determine if the child meets all requirements to exclude from the CalWORKs AU MAP based on the information on the Customer Option Detail page and the Income page.

Screenshot

Customer Information

Case Number:
 Go

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Income List

* - Indicates required fields

Continue

Root Questions

Search Results Summary

Results 1 - 7 of 7

Display From: To: View

Name	Category	Type	Source	Begin Date	End Date	
<input type="checkbox"/>		Child/Spousal Support	Child Support - Direct	Court Order	01/01/2021	<div>Edit</div> <div>View History</div>

Customer Information

Case Number:
 Go

Person Search

Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Non-Compliance

Customer Options

Customer Options List

Continue

Search Results Summary

Results 1 - 25 of 32

1 2 Next

Display From: To: View

Add

Name	Type	Begin Date	End Date	
<input type="checkbox"/>		Optional Child - Receives Child Support	09/20/2021	<div>Edit</div> <div>View History</div>

Customer Information

Case Number:
 Go

Person Search

Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Other Prog. Assist.

Non-Compliance

Customer Options

Customer Options Detail

* - Indicates required fields

Save and Add Another

Save and Return

Cancel

Name: *

Type: *
Optional Child - Receives Child Support 1

Is this child a Stepsibling or Half-Sibling of an eligible CalWORKs child? *
Yes 2

If a court order exists, does the child support order from the court show how much child support is given to each child? *
Yes 3

Begin Date: *
08/01/2022

End Date:

4

Steps To Clear Alert

14 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, accept and save the new EDBC budget 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 policy when Troubleshooting EDBC Results.

Screenshot

The screenshot displays the CalSAWS interface for running EDBC. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main navigation menu has tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The 'Run EDBC' page features a sidebar with 'Customer Information' and a main form area. The form includes a 'Case Number' field with a 'Go' button, a 'Person Search' section, and a 'Benefit Processing Range' section with 'Begin Month' and 'End Month' dropdowns. A table lists active programs: Medi-Cal, CalWORKs, and CalFresh. Red arrows and numbers 1, 2, and 3 highlight the 'Non Financial' link, the 'Begin Month' dropdown, and the 'Run EDBC' button, respectively.

Program	Status	Timely Notice Exception	Reason	Run Reason
Medi-Cal	Active			
CalWORKs	Active			
CalFresh	Active			

Steps To Clear Alert

13 Click on **EDBC Summary hyperlinks** for each program to review all eligibility factors for budgeting. Accept and save 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

Screenshot

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

EDBC List

Display by: Program: Type Reason: Run Status: From: To: Cancel

View

Search Results SummaryResults 1 - 6 of 6

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
03/2022		CalWORKs	Regular	Accepted - Saved	925.00	02/04/2022	Conversion
03/2022		CalFresh	Regular	Accepted - Saved	571.00	02/04/2022	Conversion
05/2022		Medi-Cal	Regular	Accepted - Saved	Details	04/14/2022	Batch EDBC Rules
07/2022		CalWORKs	Regular	Accepted - Saved	733.00	06/11/2022	Online EDBC Rules
07/2022		CalFresh	Regular	Not Accepted	571.00	06/11/2022	Online EDBC Rules
07/2022		Medi-Cal	Regular	Not Accepted	Details	06/11/2022	Online EDBC Rules

Steps To Clear Alert

14 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. If the NOA is not reviewed it will go out due to an overnight batch process.

Screenshot

CalSAWS

Case Name:
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Customer Information

Case Number:
 Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Distributed Documents Search

*- Indicates required fields

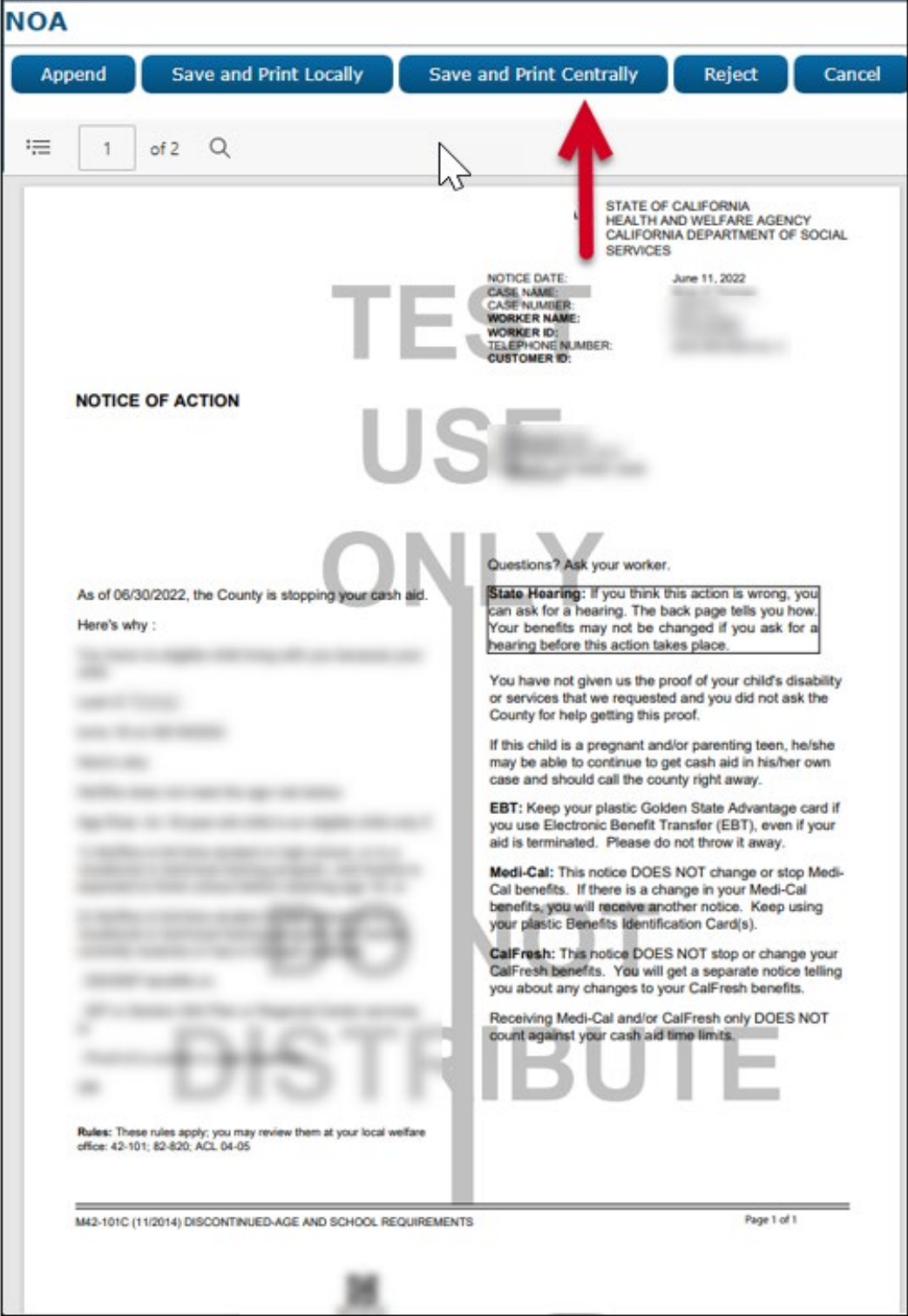
Refine Your Search


Search Results Summary

Results 1 - 4 of 4

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
06/11/2022 1:05 PM			CalWORKs	Pending Review	Details
06/11/2022 1:05 PM			Medi-Cal	Pending Review	Details
06/11/2022 1:05 PM			CalFresh	Pending Review	Details
06/11/2022 1:05 PM			CalWORKs	Pending Review	Details

This page took 1.79 seconds to load.

Steps To Clear Alert		Screenshot
15	<p>Once the Notice of Actions are reviewed, accepted, and Save and Print Centrally, journal the action taken according to county policy.</p> <p>Navigate back to the Case Summary page.</p>	

Steps To Clear Alert		Screenshot
16	<p>Journal the action taken according to county policy.</p> <p>The Yellow Banner will no longer appear on the case.</p> <p>The case review is complete!</p>	 <p>The screenshot shows the CalSAWS interface. At the top, there's a navigation bar with links like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a sub-navigation bar with tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Case Summary' and contains a form with fields for Case Name and County. Below this is a section for 'Companion Cases' with fields for Case Number and Case Name, and an 'Add' button. At the bottom, there's a 'Display:' section with a date field set to 07/01/2022 and a 'View' button. A large red text overlay reads 'Yellow Banner cleared!'. On the left side of the interface, there's a sidebar menu with options like Person Search, EBT Account Search, Application Registration, Case Summary (highlighted), Contact, Authorized Representative, Application Questions, Negative Action, New Program, and New Person.</p>