

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_INCOME	MESSI_SSP_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.

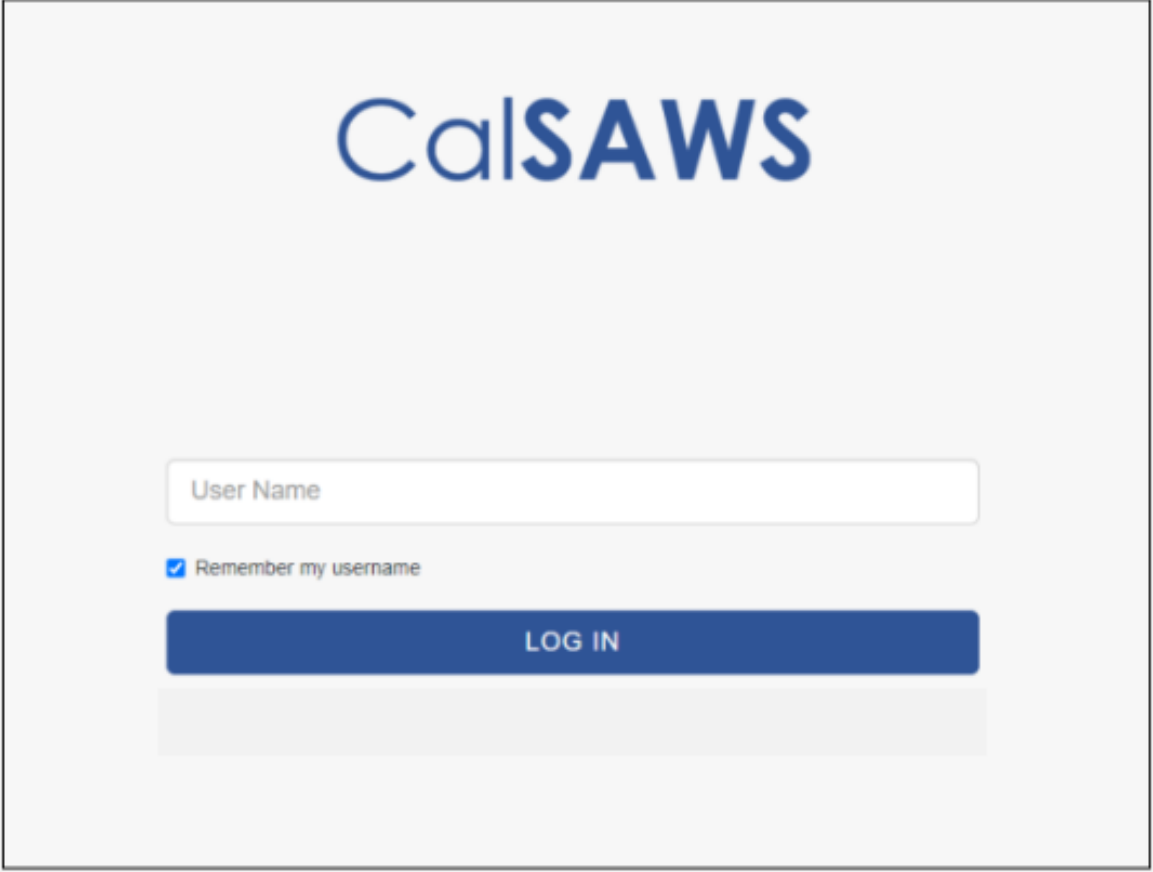
In the steps to clear the Yellow Banner detailed below, we will review a variety of examples showing failed EDBC results for Program Discontinued EDBC mismatch reasons.


Program Status Reason EDBC Mismatch Reasons			
<a href="#">No Eligible Member: Ineligible Non-Citizen</a>	<a href="#">CalFresh Recertification Expired</a>	<a href="#">Unrelated Primary Applicant</a>	<a href="#">No Eligible Child - No Deprivation</a>

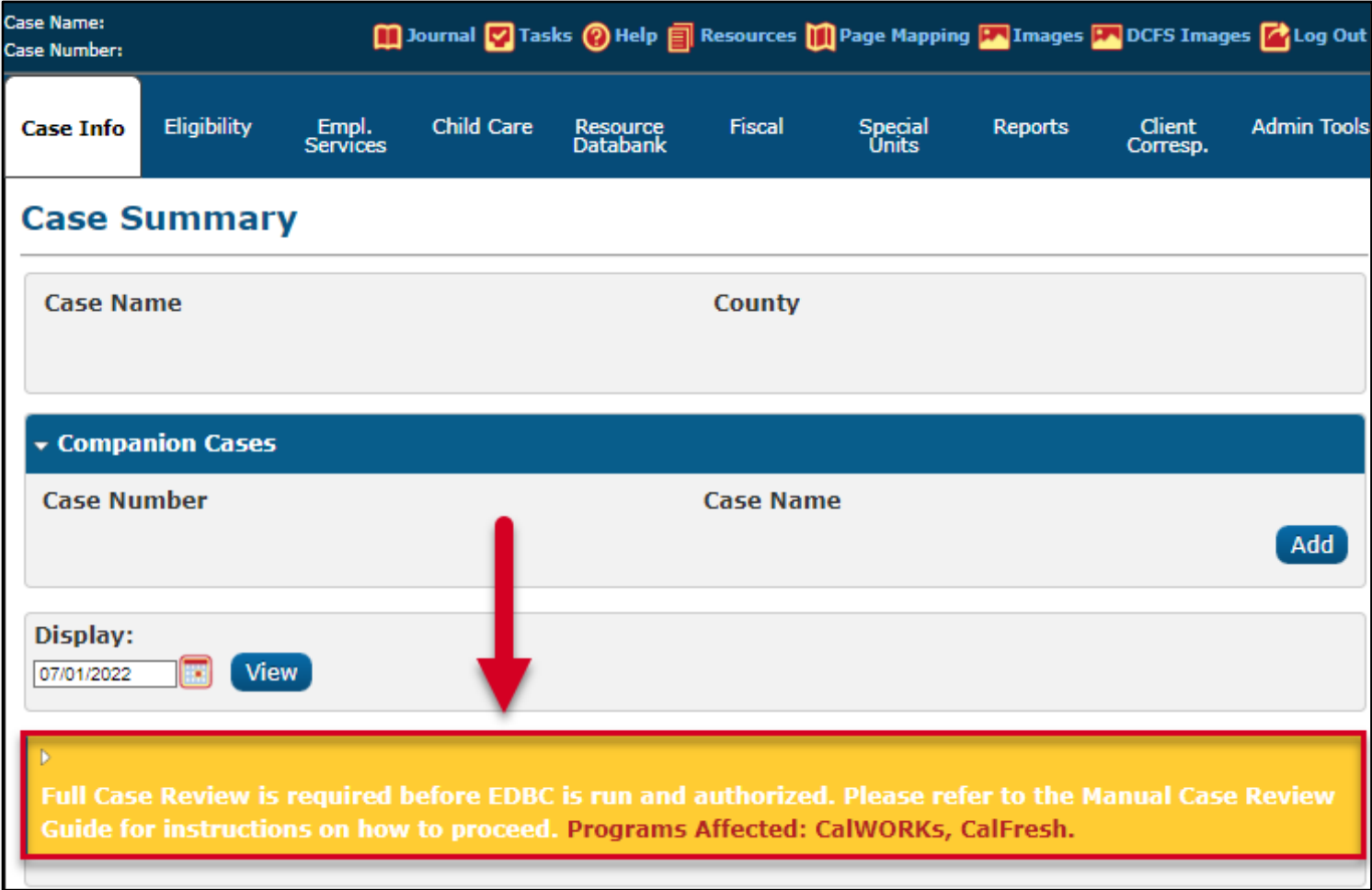
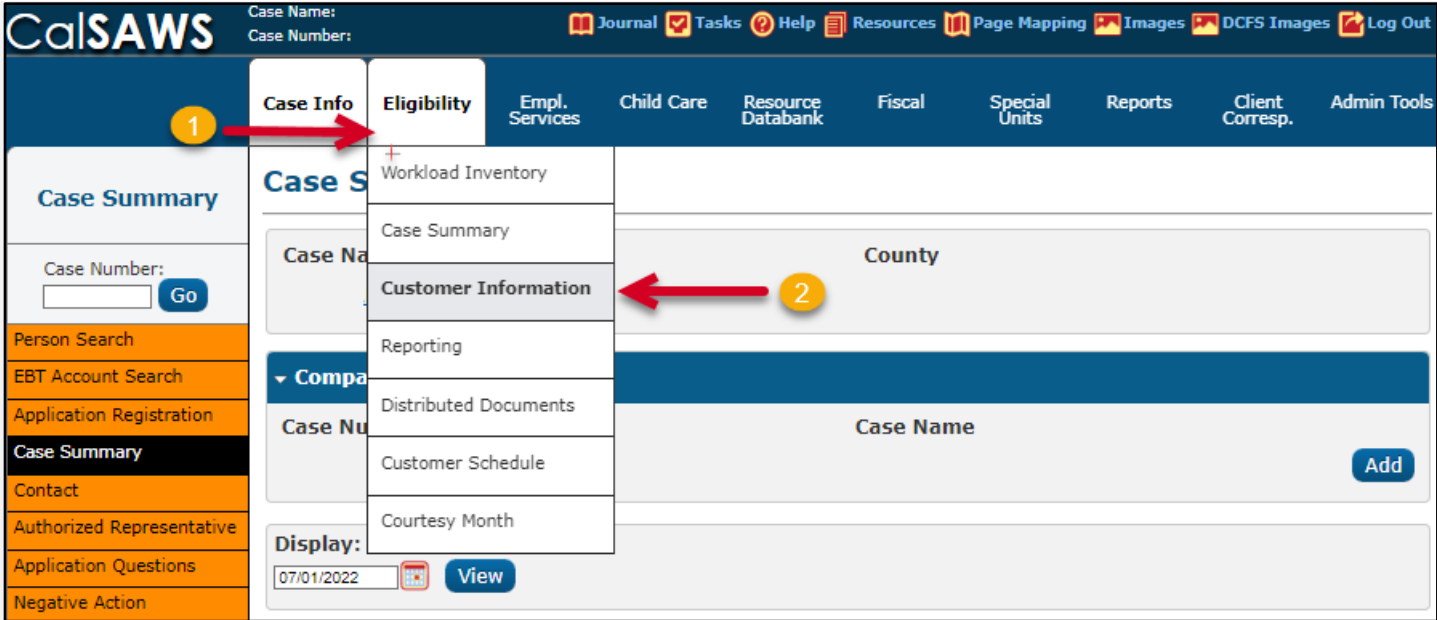
<a href="#">Country of Citizenship Not Populated and/or Section Code Update</a>	<a href="#">No Eligible Member – Failed MAGI</a>	<a href="#">Over Resources</a>	<a href="#">No Eligible Child – Mandatory/Optional Rules</a>
<a href="#">HH Members Discontinued for “Gets SSI” Role Reason</a>	<a href="#">Failure To Provide County Residence</a>	<a href="#">Over Income</a>	<a href="#">Update Good Cause Option for Immunization</a>
<a href="#">Failure To Provide Verification</a>	<a href="#">Failure To Provide Name/Identity</a>	<a href="#">No Absent/Unmarried Parent Record</a>	<a href="#">No Appl – Req Person</a>

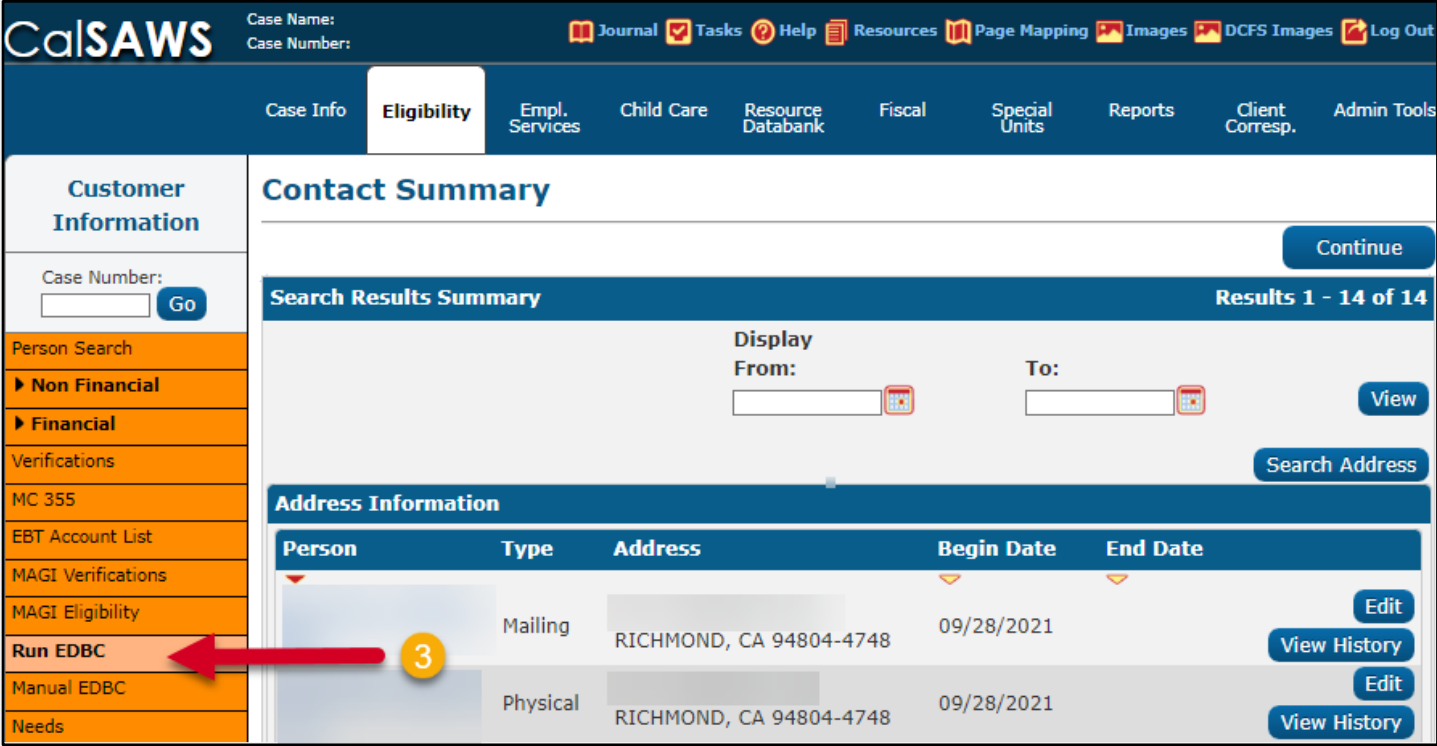
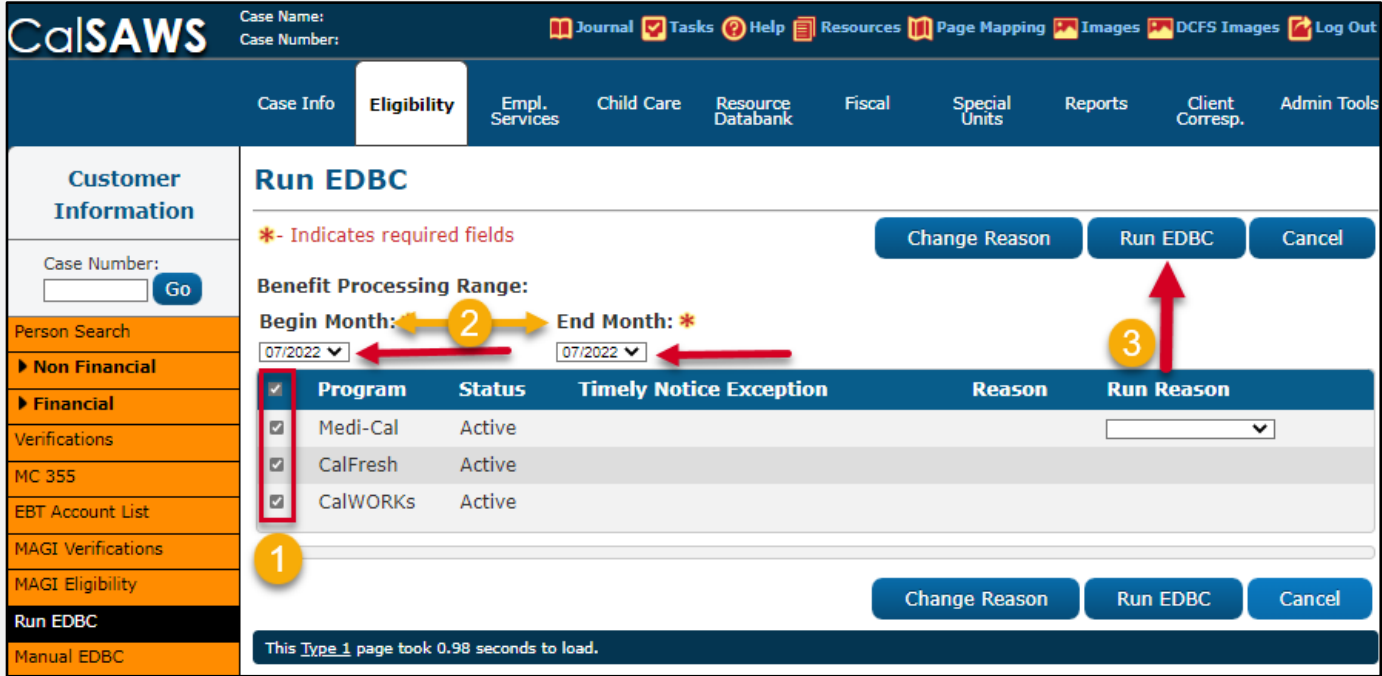
Examples

Program Discontinued

Steps to Clear Alert		Screenshot
1	<b>Log in</b> to CalSAWS by entering your Username and Password	

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

Steps to Clear Alert		Screenshot
		
3	<p>On the Case Summary Page:</p> <ol style="list-style-type: none"><li>1. Click on the <b>Eligibility</b> tab on the Global navigator</li><li>2. Click on the <b>Customer Information</b> tab on the Local navigator</li></ol>	

Steps to Clear Alert		Screenshot
	<p>From the Contact Summary page:</p> <ol style="list-style-type: none"><li>Click on <b>Run EDBC</b> tab on the Task navigator.</li></ol>	
4	<p>On the Run EDBC page:</p> <ol style="list-style-type: none"><li>Select all applicable <b>Programs</b></li></ol> <p>★ Note: Program fields must be selected first or the Begin and End Months will show grayed out.</p> <ol style="list-style-type: none"><li>Populate your <b>Begin Month</b> and <b>End Month</b> with the next future Month. <b>Do not use multi-month EDBC to clear a Yellow Banner EDBC Mismatch alert.</b></li><li>Click <b>Run EDBC</b></li></ol> <p>⚠ 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.</p>	

Steps to Clear Alert

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.

★

**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 FinancialFinancial

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: \*

07/202207/2022

Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	CalWORKs	Active		
<input checked="" type="checkbox"/>	CalFresh	Active		
<input checked="" type="checkbox"/>	Medi-Cal	Active		

The following verification(s) have not been received:

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

## Steps to Clear Alert

5

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

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

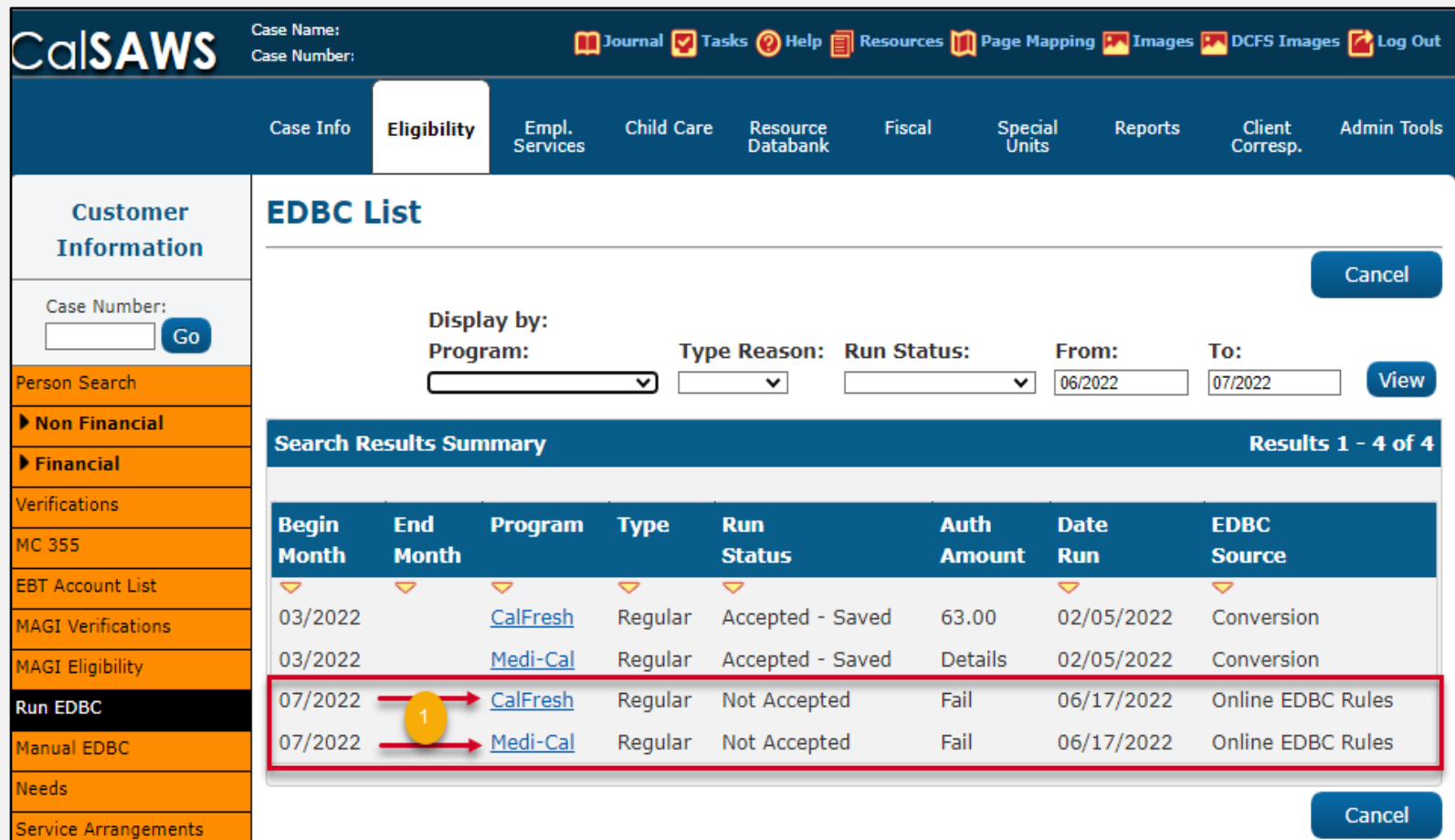
Access the EDBC List page

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 Utilities navigator:

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

## 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: 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: View

Search Results Summary Results 1 - 4 of 4

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
03/2022		<a href="#">CalFresh</a>	Regular	Accepted - Saved	63.00	02/05/2022	Conversion
03/2022		<a href="#">Medi-Cal</a>	Regular	Accepted - Saved	Details	02/05/2022	Conversion
07/2022		<a href="#">CalFresh</a>	Regular	Not Accepted	Fail	06/17/2022	Online EDBC Rules
07/2022		<a href="#">Medi-Cal</a>	Regular	Not Accepted	Fail	06/17/2022	Online EDBC Rules

Steps to Clear Alert		Screenshot
6	<p>The User will need to review discontinuance details within the <b>Program Configuration</b> section of the EDBC Summary to identify and update the data collection pages that may impact the eligibility determination.</p> <p>In this first example, both HH Members are Discontinued for “Ineligible Non-Citizen” Role Reason.</p> <p>1. Navigate to the <b>Citizenship link</b> to review the Citizenship Detail Page for information that may need to be updated.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Citizenship and Sponsorship - Add or Edit Vital Statistics</b></p>	

## Steps to Clear Alert

7

From the **Citizenship Status List** Page:

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

## Screenshot

The screenshot displays the CalSAWS interface. At the top, there's a header with the CalSAWS logo and navigation links like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a sub-header with tabs for Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Citizenship Status List' and includes a 'Continue' button. Below this are sections for 'Root Questions' and 'CalHEERS Verifications'. A 'Search Results Summary' section shows 'Results 1 - 2 of 2'. A table titled 'Non-Citizens' lists two individuals: 'Baisen 84M' and 'Ane 80F'. The row for 'Ane 80F' is highlighted with a red box, and a yellow circle with the number '1' points to the 'Edit' button next to it. Other buttons like 'View History', 'Remove', and 'Add' are also visible.

Name	Citizen Type	Begin Date	End Date	
Baisen 84M	Lawful Permanent Resident	11/22/2004		<a href="#">Edit</a> <a href="#">View History</a>
Ane 80F	Lawful Permanent Resident	06/17/2019		<a href="#">Edit</a> <a href="#">View History</a>

8 In this example, the mandatory field **Country of Citizenship** and/or **Section Codes** were not populated and will need to be updated.

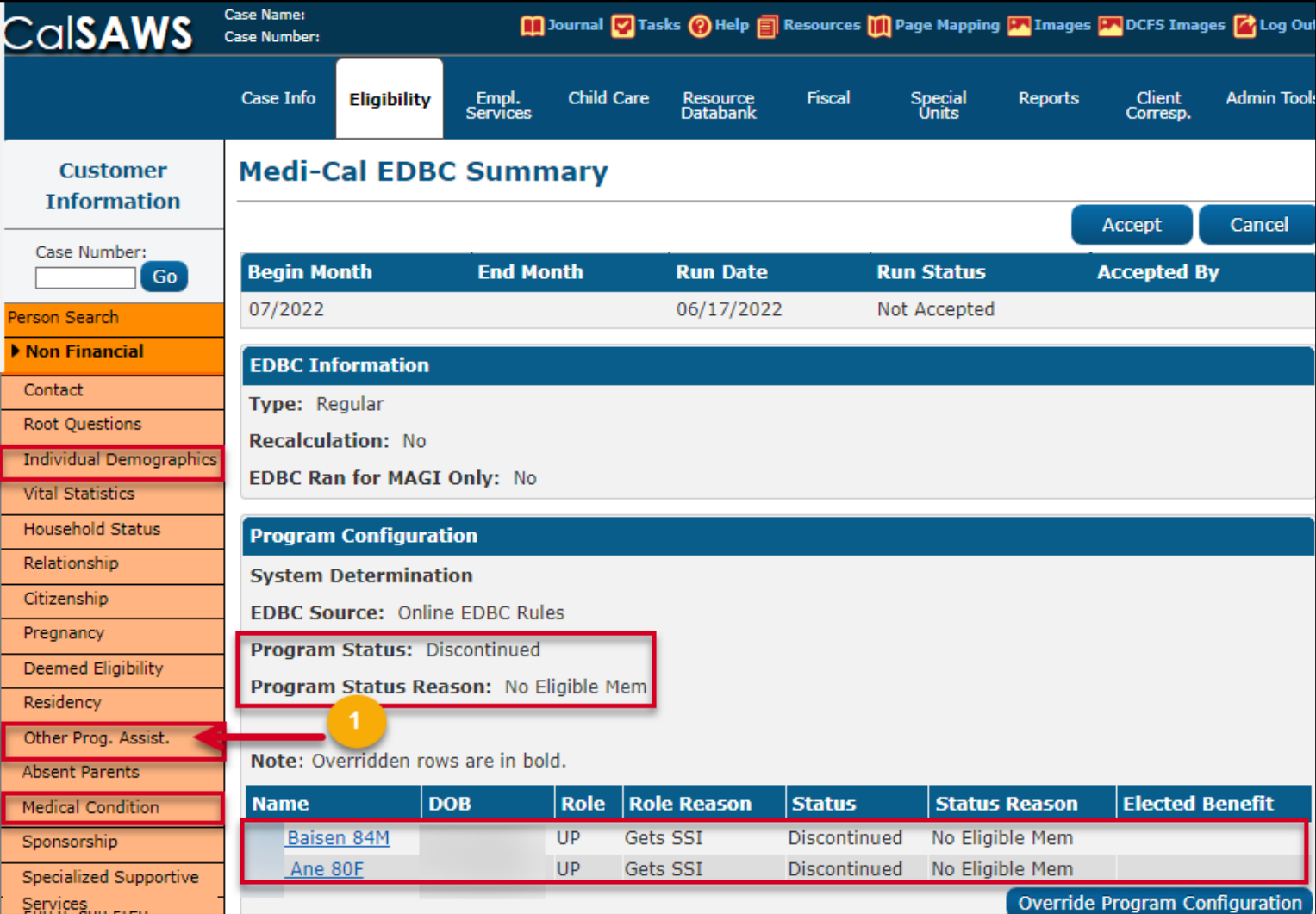
- 1. Enter **New Change Reason** and **New Reported Date**, as applicable.
- 2. Select the **Country of Citizenship** as reported and/or verified by the Individual.
- 3. Enter the correct **Document** Type if not already listed.
- 4. Select the correct **Section Code** if not already listed.
- 5. After 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

The screenshot shows the 'Citizenship Status Detail' form in the CalSAWS system. The form is divided into several sections. On the left is a sidebar with a 'Customer Information' menu. The main form area has a top navigation bar with tabs for 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The 'Eligibility' tab is selected. The form title is 'Citizenship Status Detail'. Below the title are three buttons: 'Save and Add Another', 'Save and Return', and 'Cancel'. A legend indicates that an asterisk (\*) denotes required fields. Red boxes and arrows highlight several required fields: 'New Change Reason' and 'New Reported Date' in the 'Change Reason' section; 'Document' in the 'Retrieve Information' section; 'Section Code' in the 'PRUCOL Reason' section; and 'Country of Citizenship' in the 'Country of Citizenship' section. Other fields include 'Name', 'Name upon US Entry', 'Citizenship Type', 'Document Number', 'Document First Name', 'Document Middle Name', 'Document Last Name', 'Document Date of Birth', 'Visa Number', 'SEVIS ID', 'Country of Passport Issuance', 'A Number', 'Issue Date', 'Expiration Date', 'Adjustment Date', 'Five Year Bar Admin Verification', and 'Verified'.

Steps to Clear Alert		Screenshot
9	<p>Now on the Medi-Cal EDBC Summary Page, the User will need to review the <b>Program Configuration</b> section for the discontinuance details to identify the data collection pages that could potentially affect the program discontinuance.</p> <p>In this example, both HH Members are Discontinued for “Gets SSI” Role Reason.</p> <p>1. Navigate to the <b>Other Prog. Assist.</b> (Other Program Assistance) link to review for information that may need to be updated.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Other Program Assistance (OPA) Detail Page</b></p> <p>Additional Data Collection pages to review for completion: Individual Demographics, Medical Condition, Income.</p>	

Steps to Clear Alert		Screenshot
10	<p>In this example, the CalWORKs program is discontinued for: <b>FTP Verification</b>.</p> <p>1. Navigate to the <b>Verifications</b> link to review the items outstanding on the Verification List Page.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Verifications - Manage</b></p>	 <p>The screenshot displays the CalSAWS interface. On the left sidebar, the 'Verifications' link is highlighted with a red box and a yellow circle containing the number '1'. The main content area shows the 'CalWORKs EDBC Summary' page. At the top, there are buttons for 'Change Reason', 'Accept', and 'Cancel'. Below this is a table with columns: 'Begin Month', 'End Month', 'Run Date', 'Run Status', and 'Accepted By'. The first row shows '07/2022', '06/17/2022', and 'Not Accepted'. The 'EDBC Information' section shows 'Annual Reporting Period Begin Month: 02/2022', 'Reporting Type Reason: Child Only', 'Type: Regular', and 'Recalculation: No'. The 'Program Configuration' section shows 'System Determination' with 'EDBC Source: Online EDBC Rules' and 'Aid Code:'. Below this, the 'Program Status' is 'Discontinued' and the 'Program Status Reason' is 'FTP Verification'. A note states 'Note: Overridden rows are in bold.' At the bottom, there is a table with columns: 'Name', 'DOB', 'Role', 'Role Reason', 'Status', and 'Status Reason'. Two rows are shown: 'Famous 12F' and 'Calleon 11M', both with a status of 'Discontinued' and reason of 'FTP Verification'. A red box highlights these two rows. An 'Override Program Configuration' button is at the bottom right.</p>

Steps to Clear Alert

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.

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

GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Verification List

\*- Indicates required fields

Status: \*  
Pending

From:

To:

Continue

View

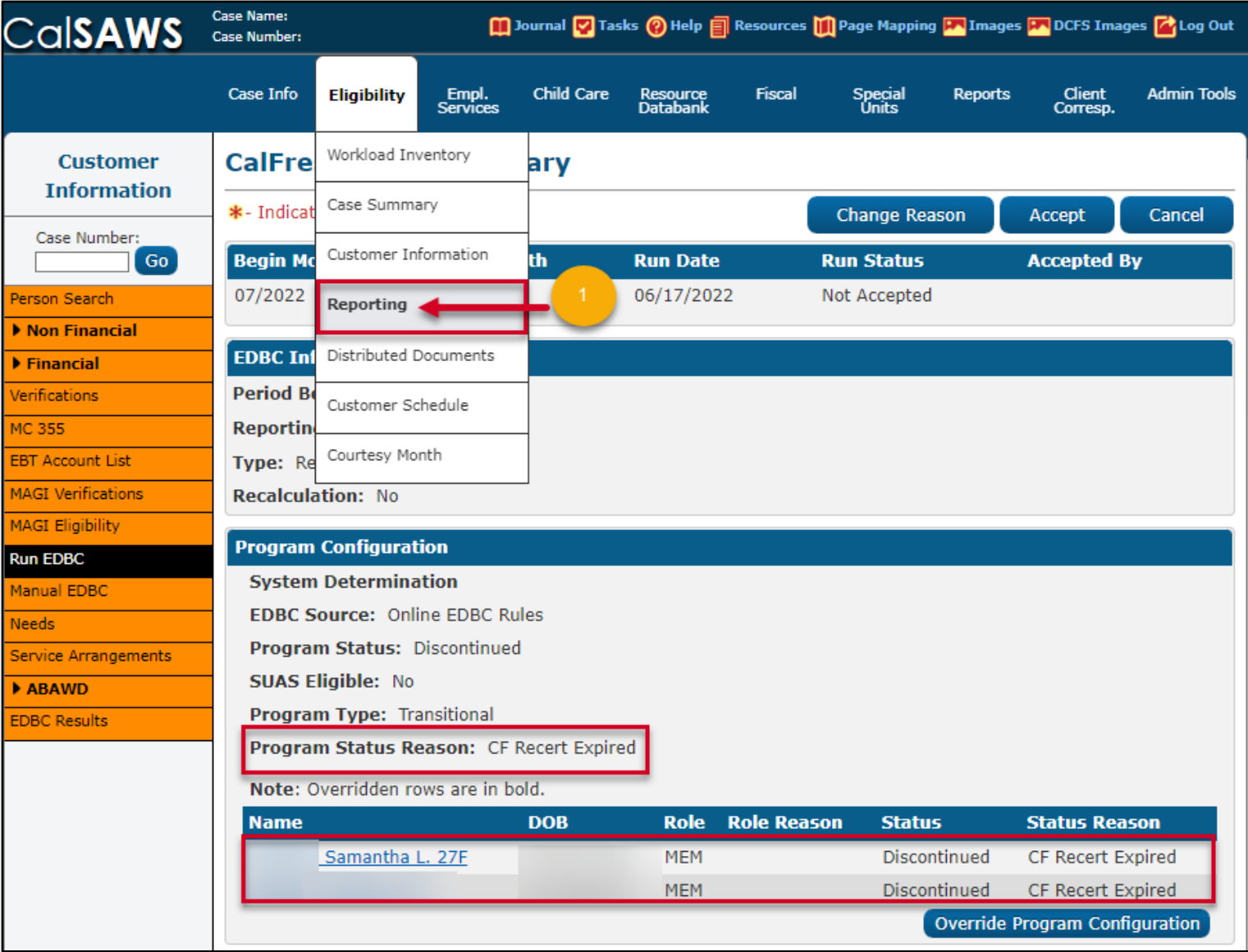
Search Results Summary

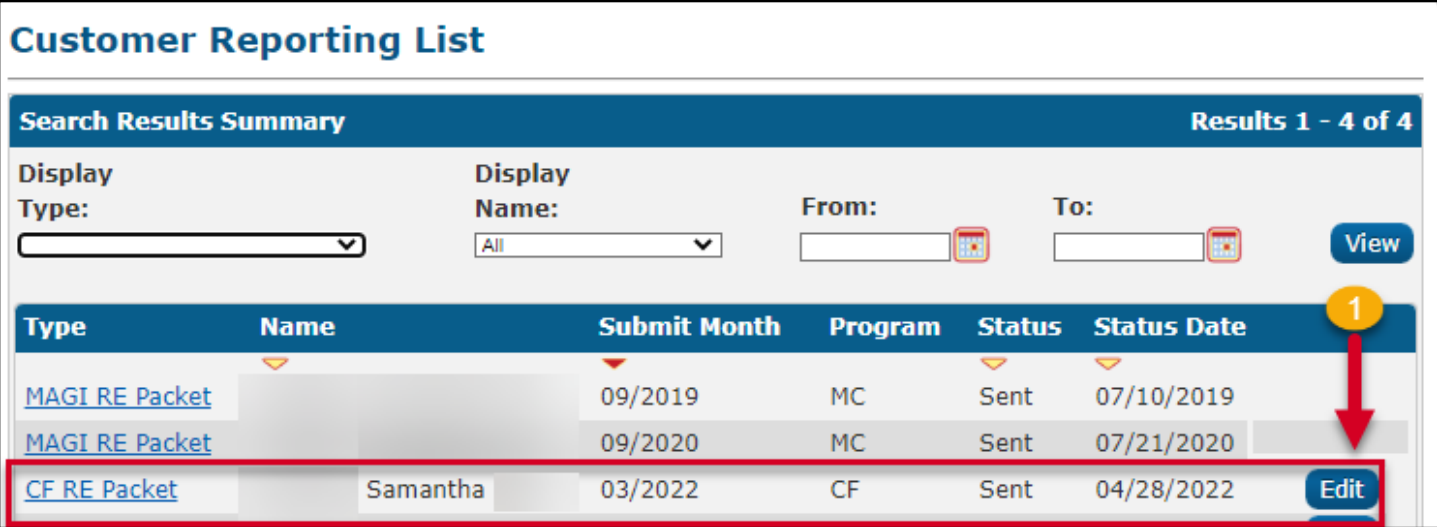
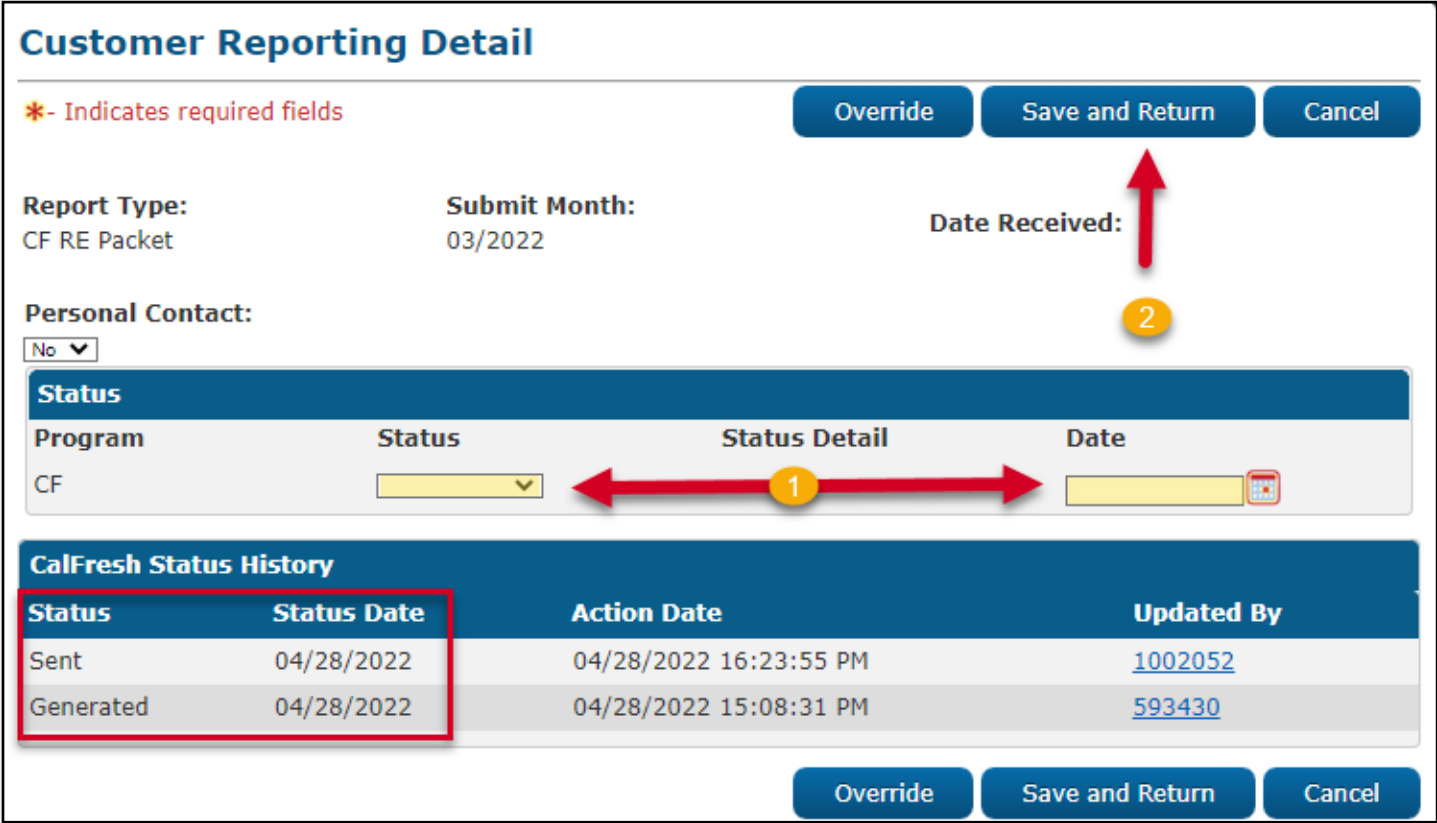
Results 1 - 17 of 17

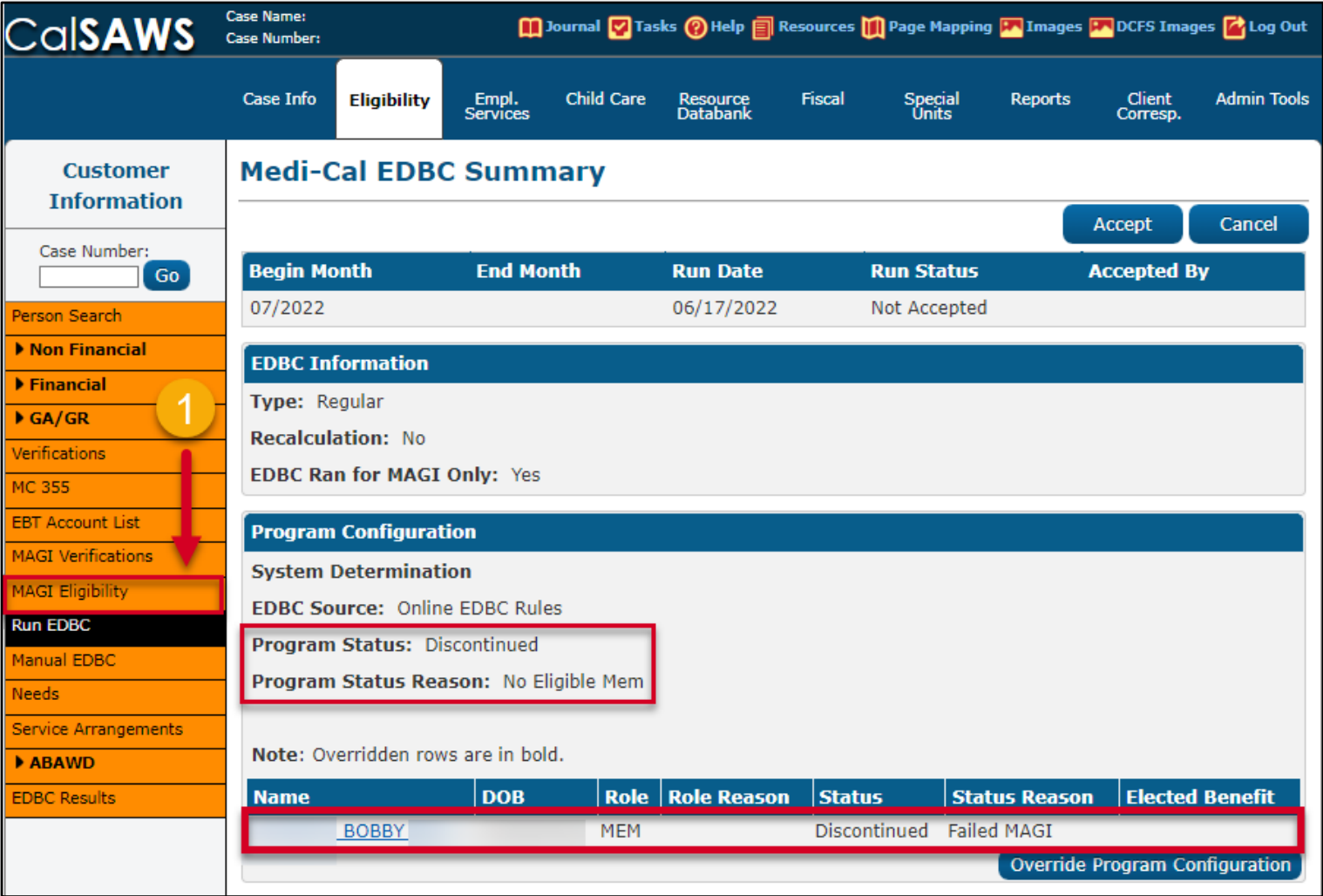
Add

Type	Name	Request Date	Due Date	Postponed ES	
<input type="checkbox"/>	<a href="#">Income</a>	05/01/06	05/11/06	Postpone	Verify
<input type="checkbox"/>	<a href="#">Income</a>	05/01/06	05/11/06	Postpone	Verify
<input type="checkbox"/>	<a href="#">School End Date</a>	08/23/07	09/02/07	Postpone	Verify
<input type="checkbox"/>	<a href="#">School End Date</a>	08/23/07	09/02/07	Postpone	Verify
<input type="checkbox"/>	<a href="#">Other Program Assistance</a>	10/01/11	10/01/11	Postpone	Verify
<input type="checkbox"/>	<a href="#">Name/Identity</a>	11/03/16	11/13/16	Postpone	Verify
<input type="checkbox"/>	<a href="#">Country of Birth</a>	02/26/21	03/03/21	Postpone	Verify
<input type="checkbox"/>	<a href="#">Vital Statistics</a>	02/26/21	03/03/21	Postpone	Verify
<input type="checkbox"/>	<a href="#">US Citizenship</a>	02/26/21	03/03/21	Postpone	Verify
<input type="checkbox"/>	<a href="#">School Attendance</a>	02/26/21	03/08/21	Postpone	Verify

Page 13

Steps to Clear Alert		Screenshot
12	<p>In this example, the CalFresh program is discontinued for: <b>CF Recert Expired</b></p> <p>1. Navigate to the Eligibility tab and click on the <b>Reporting</b> link to review the outstanding Customer Report.</p> <p>The following Job Aids are available to assist with review and processing of Customer Reports in CalSAWS:</p> <p><b>CalWORKs CalFresh Re-Evaluation and Periodic Reporting</b> <b>Transitional CalFresh (TCF) Processing</b> <b>Barcoding</b> <b>Semi-Annual Report (SAR 7) - Process</b> <b>Medi-Cal Renewal Packets</b></p>	

Steps to Clear Alert		Screenshot
13	<p>On the <b>Customer Reporting List</b> page, review the CF RE Packet in <b>Sent</b> status to access the Customer Reporting Detail Page.</p> <p>1. Click <b>Edit</b> to access the CF RE Packet sent 04/28/2022</p>	
14	<p>On the <b>Customer Reporting Detail</b> page, review the CalFresh Status History</p> <p>1. Update the <b>Status</b> field as appropriate and enter the applicable <b>Date</b></p> <p>2. Click <b>Save and Return</b> to save changes to the CF RE Packet status</p>	

Steps to Clear Alert		Screenshot
15	<p>In this example, the Medi-Cal program is discontinued for: <b>No Eligible Member – Failed MAGI</b></p> <p>1. Navigate to the <b>MAGI Eligibility</b> link to begin review of MAGI results</p> <p>The following CalSAWS Quick Guide is available in the LMS:</p> <p><b>CalSAWS Quick Guide – MAGI Determination Request</b></p> <p>The following Job Aids are available to assist with MAGI and Medi-Cal eligibility review in CalSAWS:</p> <p><b>Customer Options Detail - Add</b> <b>Medi-Cal - Tax Household</b> <b>Medi-Cal - MAGI Referrals and Eligibility Determinations</b> <b>Medi-Cal – MAGI Discontinuances</b> <b>Medi-Cal CalHEERS MAGI Eligibility Review</b></p>	 <p>The screenshot displays the CalSAWS interface for the 'Medi-Cal EDBC Summary'. The left sidebar contains a 'Customer Information' menu with various options. The 'MAGI Eligibility' option is highlighted with a red arrow and a yellow circle containing the number 1. The main content area shows the 'Medi-Cal EDBC Summary' page. At the top, there are buttons for 'Accept' and 'Cancel'. Below this is a table with columns: 'Begin Month', 'End Month', 'Run Date', 'Run Status', and 'Accepted By'. The table shows a single row with values: '07/2022', '06/17/2022', 'Not Accepted'. Below the table is a section titled 'EDBC Information' with fields for 'Type: Regular', 'Recalculation: No', and 'EDBC Ran for MAGI Only: Yes'. Another section titled 'Program Configuration' contains 'System Determination' with 'EDBC Source: Online EDBC Rules'. Below this, 'Program Status: Discontinued' and 'Program Status Reason: No Eligible Mem' are highlighted with a red box. A note states: 'Note: Overridden rows are in bold.' At the bottom, there is a table with columns: 'Name', 'DOB', 'Role', 'Role Reason', 'Status', 'Status Reason', and 'Elected Benefit'. The table shows a single row for 'BOBBY' with values: 'MEM', 'Discontinued', 'Failed MAGI'. A red box highlights this row. At the bottom right, there is a button labeled 'Override Program Configuration'.</p>

## Steps to Clear Alert

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

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:  [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

► GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

► ABAWD

EDBC Results

MAGI Determination List

\*- Indicates required fields

A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- Tax household information is missing for the following person(s):
  - BOBBY

Request MAGI Determination

Begin Month: \*

07/2022

End Month: \*

07/2022

Program Identifier: \*

Medi-Cal

Life Change Event:

☐ Bypass Primary Contact Matching Criteria

☐ Request Lift Options

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

Request MAGI

Display MAGI Determinations

Begin Date:


End Date:

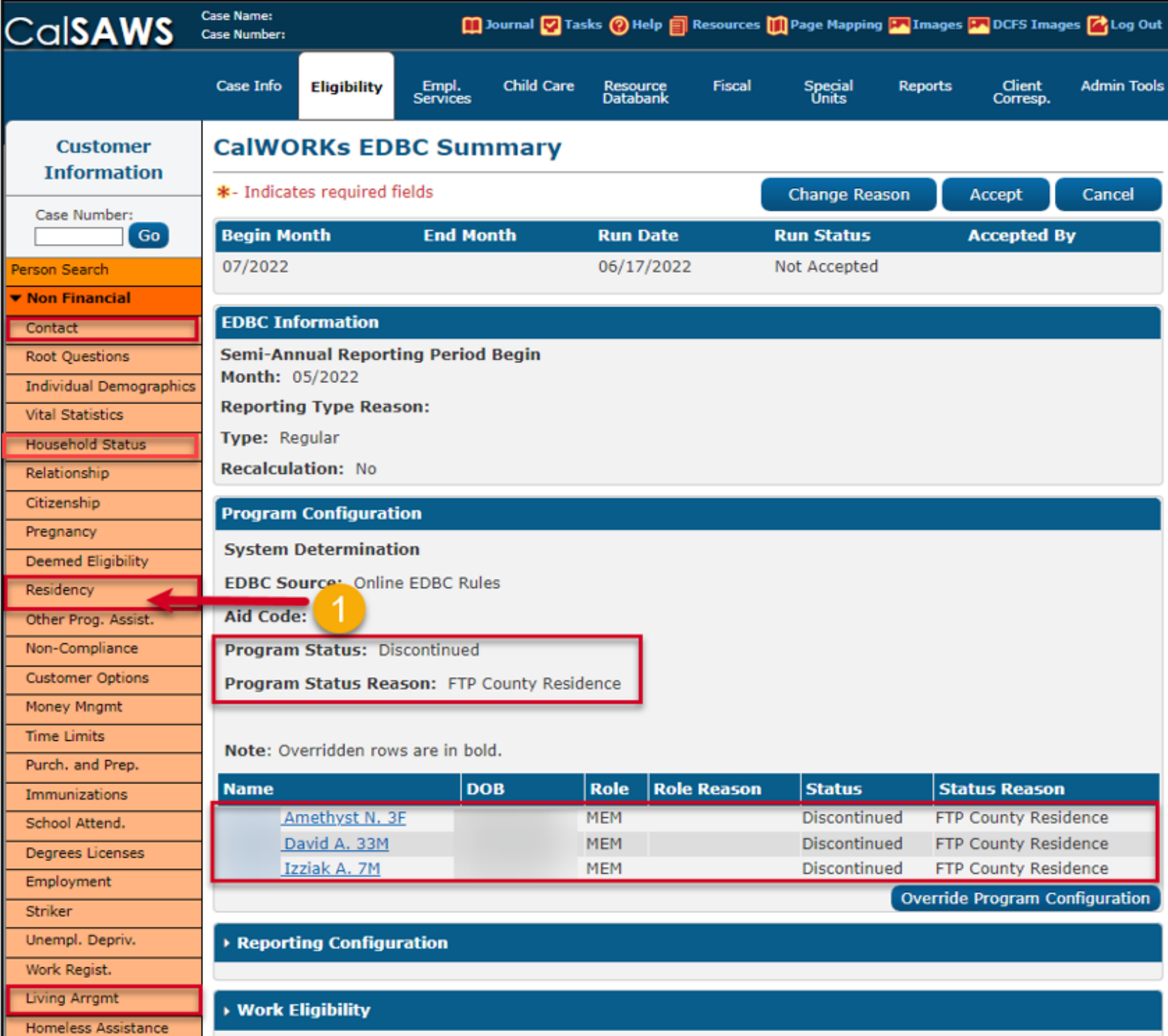
Search Results Summary

Results 1 - 1 of 1

View

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
07/2016	<a href="#">Determination</a>	Complete	06/05/2016 8:38 AM	CalHEERS	Not Eligible

Steps to Clear Alert		Screenshot
17	<p>On the <b>Tax Household Detail Page</b>, review and update the following mandatory fields:</p> <ol style="list-style-type: none"><li>1. Select the <b>Primary Tax Filer</b> from the dropdown box.</li><li>2. Indicate whether the Individual is <b>required to file taxes</b> for the current year.</li><li>3. Indicate whether the Individual <b>is planning to file taxes</b> for the current year.</li><li>4. Click <b>Save</b> to add the record.</li></ol> <p>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.</p>	 <p>The screenshot shows the CalSAWS interface with the 'Tax Household Detail' form. The left sidebar contains a navigation menu with categories like 'Customer Information', 'Non Financial', 'Financial', 'Tax Household', and 'GA/GR'. The main form area has several sections: 'Name' (BOBBY), 'Primary Tax Filer' (dropdown, marked with a red box and callout 1), 'Filing Year' (2022), 'Is this person expected to be required to file taxes for the current year?' (dropdown, marked with callout 2), 'Is this person planning to file taxes for the current year?' (dropdown, marked with callout 3), 'Expected Filing Status' (dropdown), 'Caretaker Relative' (dropdown), 'Is this person expected to be claimed as a Dependent by a non-custodial parent?' (No), 'Who claims this person as a Dependent this year?' (dropdown), and 'Projected Annual Income' (dropdown, marked with callout 4). The 'Projected Annual Income' section includes a text input for the amount and a dropdown for 'Is the Projected Annual Income amount correct?'. At the bottom right are 'Save' and 'Cancel' buttons. A red arrow points from callout 4 to the 'Save' button.</p>

Steps to Clear Alert		Screenshot
18	<p>In this example, the CalWORKs program is discontinued for: <b>FTP County Residence</b></p> <p>1. Navigate to the <b>Residency</b> Page to update and verify Residency information prior to re-running EDBC.</p> <p>Additional Data Collection pages to review for completion: Contact, Living Arrangement, Household Status, etc.</p>	

## Steps to Clear Alert

## Screenshot

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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.

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

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Employment

Striker

Unempl. Benefit

CalWORKs EDBC Summary

\* - Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/17/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin  
Month: 05/2022

Reporting Type Reason:  
Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

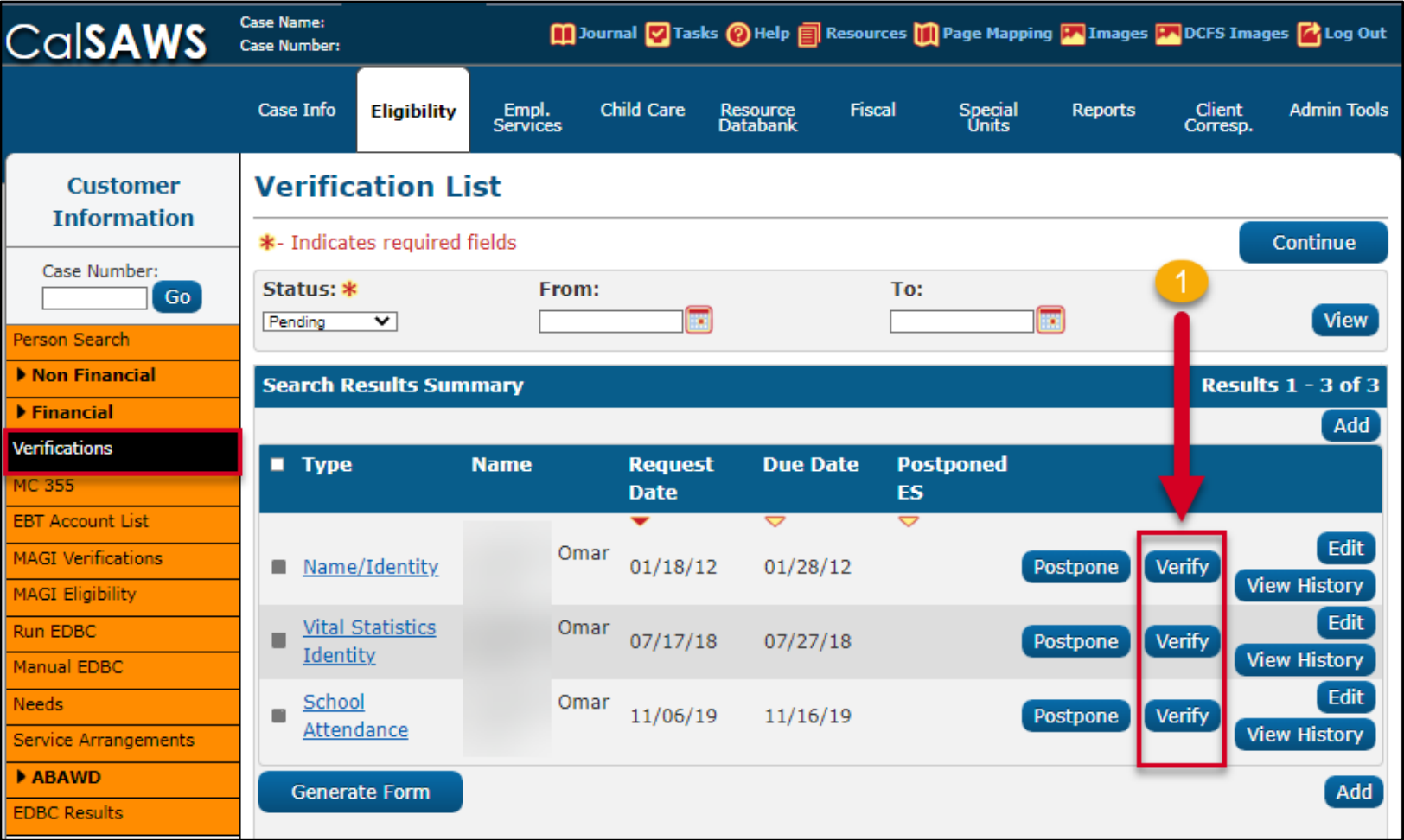
Program Status: Discontinued

Program Status Reason: FTP Name/Identity

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Omar 10M		MEM		Discontinued	FTP Name/Identity
Sandra 47F		FRE	CW Time Limit	Discontinued	FTP Name/Identity
Luis E. 50M		MEM		Discontinued	FTP Name/Identity
Joanna O. 15F		MEM		Discontinued	FTP Name/Identity

Override Program Configuration

Steps to Clear Alert		Screenshot
20	<div>1. Click <b>Verify</b> to confirm receipt of any item that has been verified by the Participant. This will confirm the previous entry made by the user on the corresponding data collection page. In this example, the Individual Demographics page would be updated for Name/Identity, and the Vital Statistics page for Vital Statistics Identify if the user select either or both options.</div> <div>The Verification list page will list and display any verifications that are in a pending status on the data collection pages.</div> <div>On this page, Users can verify verifications and also send out a CW 2200 form, if needed.</div> <div>Follow your county policy when adding verifications to the <b>Verification List</b> page.</div> <div>For information on how to add, edit and view the details of verification requests, see Job Aid: <b>JA Verifications – Manage</b></div>	 <p>The screenshot shows the CalSAWS interface. On the left is a sidebar with a 'Customer Information' section containing a 'Case Number' field and a 'Go' button. Below this is a list of navigation items: 'Person Search', 'Non Financial', 'Financial', 'Verifications' (highlighted with a red box), 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC', 'Manual EDBC', 'Needs', 'Service Arrangements', 'ABAWD', and 'EDBC Results'. The main content area is titled 'Verification List' and includes a 'Status' dropdown set to 'Pending', 'From' and 'To' date pickers, and a 'Continue' button. Below this is a 'Search Results Summary' section showing 'Results 1 - 3 of 3'. A table lists three verification requests for 'Omar': 'Name/Identity' (Request Date: 01/18/12, Due Date: 01/28/12), 'Vital Statistics Identity' (Request Date: 07/17/18, Due Date: 07/27/18), and 'School Attendance' (Request Date: 11/06/19, Due Date: 11/16/19). Each row has 'Postpone' and 'Verify' buttons. The 'Verify' button for the 'Name/Identity' row is highlighted with a red box, and a red arrow points to it from a yellow circle containing the number '1'. To the right of the table are 'Edit' and 'View History' buttons for each entry. At the bottom of the table is a 'Generate Form' button and an 'Add' button.</p>

## Steps to Clear Alert

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

## 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:  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

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Employment

**CalWORKs EDBC Summary**

\*- Indicates required fields

Change Reason Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/17/2022	Not Accepted	

**EDBC Information**

Reporting Type Reason:

Type: Regular

Recalculation: No

**Program Configuration**

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

**Program Status:** Discontinued

**Program Status Reason:** Unrelated Prim Appl

View All

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Amethyst N. 3F		MEM		Discontinued	Unrelated Prim Appl
David A. 33M		MEM		Discontinued	Unrelated Prim Appl
Izziak A. 7M		MEM		Discontinued	Unrelated Prim Appl

Override Program Configuration

## Steps to Clear Alert

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.

## 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:

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

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

Relationship List

Number of relationships remaining to be created: 0

Continue

Search Results Summary

Results 1 - 6 of 6

Display by Relationship:

From:

To:

View

Add

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
David 33M	Parent (Biological/Adoptive)	Amethyst 3F	No			<div>Edit</div> <div>View History</div>
	Parent (Biological/Adoptive)	Izziak 7M	Yes			<div>Edit</div> <div>View History</div>
Izziak 7M	Sibling (full or half)	Amethyst 3F	No			<div>Edit</div> <div>View History</div>
Mikayla 27F	Spouse	David 33M	No			<div>Edit</div> <div>View History</div>
	Parent (Biological/Adoptive)	Izziak 7M	Yes			<div>Edit</div> <div>View History</div>
	Parent (Biological/Adoptive)	Amethyst 3F	Yes			<div>Edit</div> <div>View History</div>

### Steps to Clear Alert

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.

### Screenshot

Case Name: David

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

Case Summary

Case Number:  Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Application Questions

Negative Action

New Program

New Person

Hide Person

EBT Account List

Issuance History

Auxiliary Authorization List

Expungement History

Child Support Collections

Time Limit Aid Summary

Housing Support

Home Visiting

Legacy Case

Confidentiality

ICT Summary

IAT Summary

MAGI Case Search

Customer Contact History

SB 87

Invoice History

Linkages

General Ledger

Valuable History

Point Of Service

Case Copy List

Case Summary

Case Name: David County

Companion Cases

Case Number Case Name

Remove Add

Display: 07/01/2022 View

Full Case Review is required before EDBC is run and authorized. Please refer to the Manual Case Review Guide for instructions on how to proceed. Programs Affected: CalWORKs, CalFresh, Medi-Cal.

CalWORKs

Worker: Worker ID: Program Status: Active RE Due Month: 10/2022 Re-Evaluate Reporting Type: Semi-Annual Reporting SAR Due Month: 04/2022 Aid Code: 30 - CW-All Other Families (Fed) Public Assistance Indicator: FBU: 0

Primary Applicant/Recipient: Mikayla 27F Language: English Phone Number: Email: johndoe@testcalsaws.org Payee: David 33M Additional Correspondence Recipient: David 33M Application Date: 08/03/2018

Name	Deprivation	Role	Role Reason	Status	Status Reason
David 33M	Absence	MEM		Active	
Mikayla 27F	Absence	MEM		Discontinued	

View WPR View Details

Steps to Clear Alert

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**

Screenshot

CalSAWS

Case Name: David  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number:  
 Go

Person Search  
EBT Account Search  
Application Registration  
Case Summary  
Contact  
Authorized Representative  
Application Questions  
Negative Action  
New Program  
New Person  
Hide Person  
EBT Account List  
Issuance History  
Auxiliary Authorization List  
Expungement History  
Child Support Collections  
Time Limit Aid Summary  
Housing Support  
Home Visiting  
Legacy Case  
Confidentiality  
ICT Summary  
IAT Summary  
MAGI Case Search  
Customer Contact History  
SB 87  
Invoice History  
Linkages  
General Ledger  
Valuable History  
Point Of Service  
Case Copy List

CalWORKs Detail

\* - Indicates required fields

View HistorySave and ReturnCancel

Date: \*  
07/01/2022View Date

Program Information

Status: \*ActiveStatus Reason:Source: \*Self-Service Portal

Application Date: \*08/03/2018EditRE Begin Month: 11/2021RE Due Month: \*10/2022

Reporting Type: Semi-Annual ReportingSAR Due Month: 04/2022

Automatically Reassign When Activated: No

Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees	
Mikayla 27F	Primary Applicant/Recipient	05/05/2021			Edit
David 33M	Payee	05/05/2021			Edit
David 33M	Additional Correspondence Recipient	05/05/2021			Edit
					Add

Program Persons

Name	Role	Role Reason	Status	Status Reason	
Amethyst 3F	MEM		Active		Edit
David 33M	MEM		Active		Edit
Izziak 7M	MEM		Active		Edit
Mikayla 27F	MEM		Discontinued		

RescindReapply


Secondary Assignment

Worker

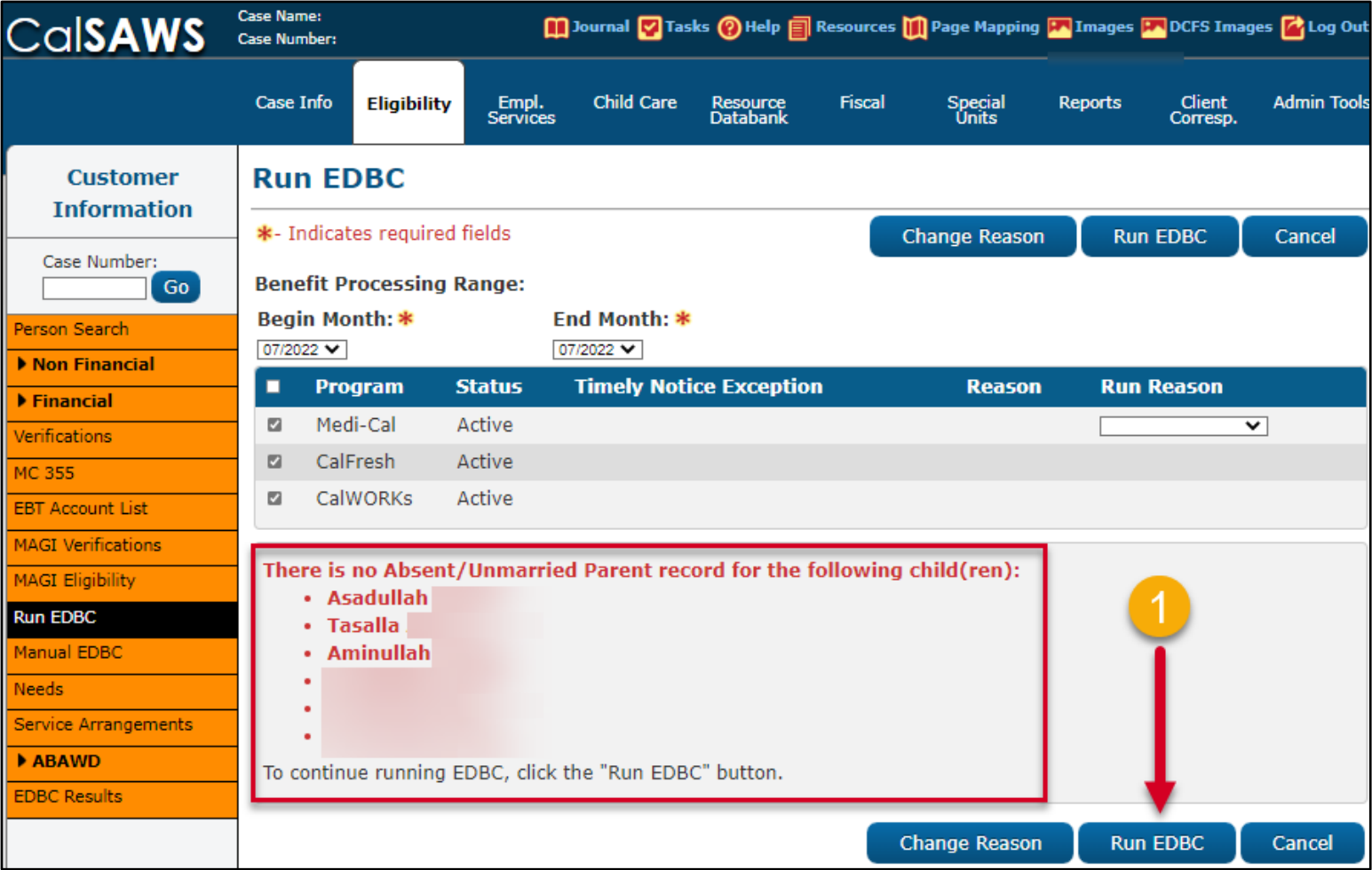
Select

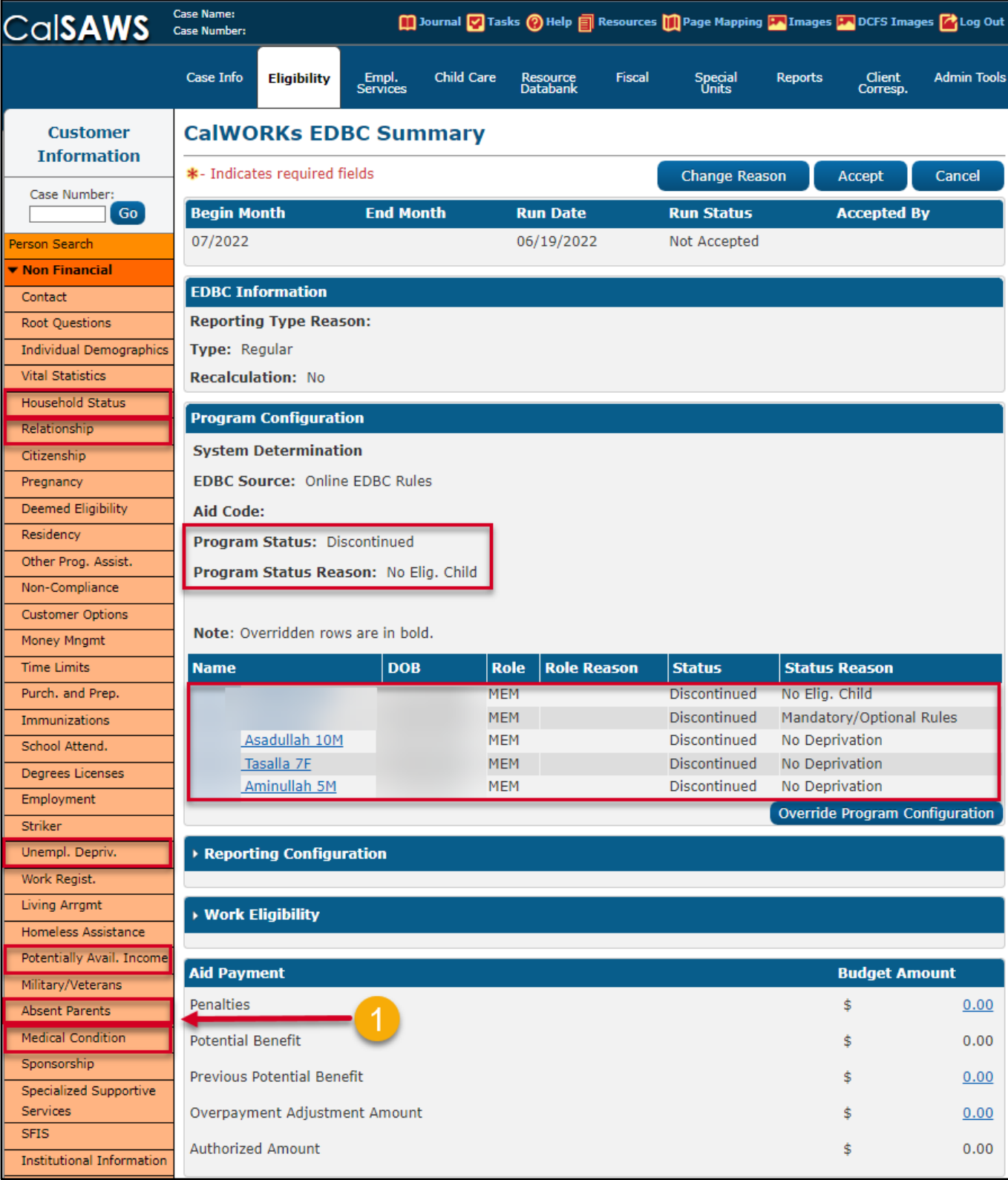
View HistorySave and ReturnCancel

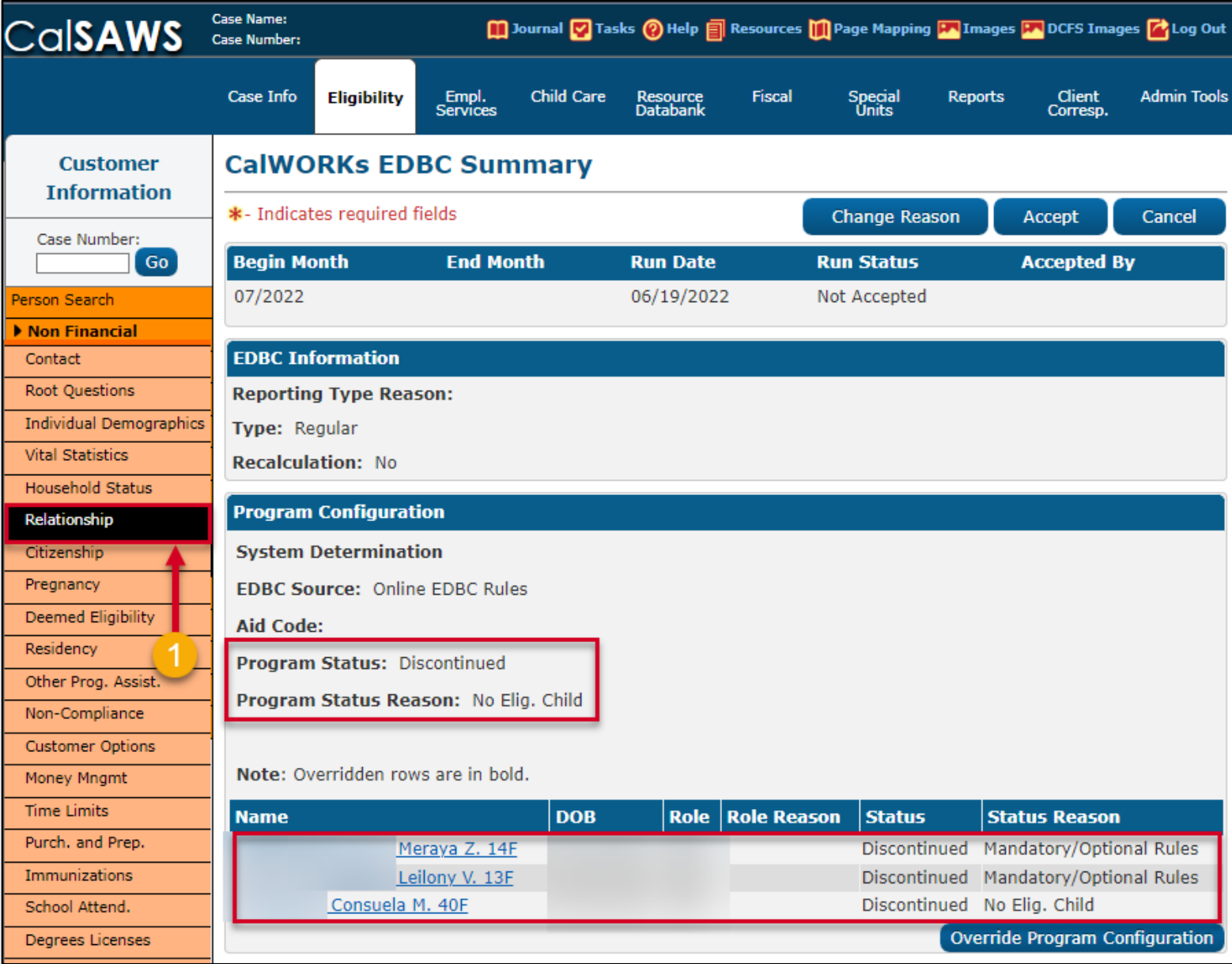
Steps to Clear Alert		Screenshot
25	<p>In the <b>Administrative Role Detail</b> page:</p> <ol style="list-style-type: none"><li>1. Select <b>Primary Applicant/Recipient</b> from the dropdown selection window.</li><li>2. Select the new Primary Applicant (Case) <b>Name</b>.</li><li>3. Enter the <b>Begin Month</b> of the change.</li><li>4. Click <b>Save and Return</b> to update the record.</li></ol>	<p>The screenshot shows the CalSAWS interface. At the top, there's a header with the CalSAWS logo and navigation links like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a sub-header with tabs for Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Administrative Role Detail'. It includes a 'Case Summary' sidebar on the left with links like Person Search, EBT Account Search, Application Registration, Case Summary (highlighted), Contact, Authorized Representative, Application Questions, and Negative Action. The main form has fields for 'Administrative Role' (dropdown), 'Name' (dropdown), 'Begin Month' (calendar), and 'End Month' (calendar). Red arrows and numbered circles (1-4) indicate the steps: 1 points to the 'Administrative Role' dropdown, 2 points to the 'Name' dropdown, 3 points to the 'Begin Month' calendar, and 4 points to the 'Save and Return' button. A 'Save and Return' button is also present at the top right of the form area. A status bar at the bottom indicates 'This Type 1 page took 0.54 seconds to load.'</p>

Steps to Clear Alert		Screenshot
26	<p>In this example, the CalFresh program is discontinued for: <b>Over Resources</b></p> <p>1. Navigate to the <b>Property</b> Page to update and verify and Individual information prior to re-running EDBC.</p> <p>★ Categorically Eligible: No Public Assistance: No Modified Categorical Eligibility: No</p> <p>Other factors may contribute to the need for a Resource determination for this CF Program, as this HH is not conferred CE or MCE.</p> <p>Additional Data Collection pages to review for completion: Income, Expenses, Medical Condition, Medicare, Other Program Assistance, etc.</p> <p>Additional <b>Quick Guides</b> available in LMS <b>and Job Aids</b> available in CalSAWS:</p> <p><b>Property Management</b> <b>Income Categories and Types in the System</b> <b>Expense Management</b></p>	

Steps to Clear Alert		Screenshot
27	<p>In this example, the CalWORKs program is discontinued for: <b>Over Income</b></p> <p>1. Navigate to the <b>Income</b> link to review and update any Income information for prior to re-running EDBC.</p> <p>Ensure income is correctly entered on the Income Detail page.</p> <p>Ensure Begin and End Dates are correct for each income record</p> <p>Additional Data Collection pages to review for completion: Other Program Assistance, Expenses, Medicare, etc.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Income Categories and Types in the System Verifications - Manage</b></p>	

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

Steps to Clear Alert		Screenshot
29	<p>On the <b>CalWORKs EDBC Summary</b>, results show the two-parent CW AU has been discontinued for: <b>No Elig. Child</b> (No Eligible Child) - <b>No Deprivation</b>. 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.</p> <p>1. Click the <b>Absent Parent</b> page to update Data Collection as prompted by the soft validation error message.</p> <p>Once updated, additional Data Collection pages to review for completion and accuracy, as this is a two-parent AU requiring a Deprivation determination:</p> <p>Unemployment Deprivation, Medical Condition, Potentially Available Income, Household Status, Relationship, Individual Demographics (deceased parent record if previously in the home), etc....</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Child Support - Support Questionnaire</b> <b>Unemployment Deprivation Detail - PWE Worksheet and Detail Page</b> <b>Employment Detail - Add or Edit</b> <b>Medical Condition Detail – Disabled or SP-DDSD</b></p>	

Steps to Clear Alert		Screenshot
30	<p>In this example, the CalWORKs program is discontinued for: <b>No Elig. Child</b> (No Eligible Child) – <b>Mandatory/Optional Rules</b></p> <p>1. Click on the <b>Relationship</b> link to review data collection page prior to re-running EDBC.</p> <p>Confirm <b>Relationships</b> are correctly established and verified.</p> <p>Verify all AU/HH Members have an <b>In the Home</b> record is effective as of the Application Date/BDA or earlier.</p> <p>Confirm all required <b>AU/HH Members</b> persons have been added to the Program.</p> <p>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.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Relationship Information – Add</b> <b>School Attendance Information-Add and Edit</b> <b>Medical Condition Detail - Fry v Saenz</b> <b>Welfare to Work Exemptions – Adding and Editing</b> <b>Sanction Process – Curing a Sanction with a Cure</b> <b>Sanction Activity</b></p>	 <p>The screenshot displays the CalSAWS interface. On the left, a sidebar menu under 'Customer Information' has the 'Relationship' link highlighted with a red box and a red arrow pointing to it, labeled with a yellow circle containing the number '1'. The main content area is titled 'CalWORKs EDBC Summary'. It includes a table with columns: Begin Month, End Month, Run Date, Run Status, and Accepted By. Below this is the 'EDBC Information' section, followed by 'Program Configuration' which shows 'System Determination' and 'EDBC Source: Online EDBC Rules'. The 'Aid Code' section shows 'Program Status: Discontinued' and 'Program Status Reason: No Elig. Child', both highlighted with a red box. At the bottom, a table lists individuals with columns: Name, DOB, Role, Role Reason, Status, and Status Reason. Three individuals are listed: Meraya Z. 14F, Leilony V. 13F, and Consuela M. 40F. All three have a Status of 'Discontinued'. The Status Reason for Meraya and Leilony is 'Mandatory/Optional Rules', and for Consuela it is 'No Elig. Child'. This table is also highlighted with a red box. An 'Override Program Configuration' button is at the bottom right.</p>

## Steps to Clear Alert

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.

## 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:  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

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Relationship List

Number of relationships remaining to be created: 0 Continue

Search Results Summary Results 1 - 6 of 6

Display by Relationship: All Related
From: 
To: 
View
Add

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
Leilony 13F	Child	Consuela 40F	No	2010		<span>Edit</span> <span>View History</span>
Meraya 14F	Sibling (full or half)	Leilony 13F	No	2009		<span>Edit</span> <span>View History</span>
Meraya 14F	Child	Consuela 40F	No	2010		<span>1</span> <span>Edit</span> <span>View History</span>
Reina 17F	Child	Consuela 40F	No	2010		<span>Edit</span> <span>View History</span>
	Sibling (full or half)	Meraya 14F	No	2009		<span>Edit</span> <span>View History</span>
	Sibling (full or half)	Leilony 13F	No	2009		<span>Edit</span> <span>View History</span>

Steps to Clear Alert		Screenshot
32	<p>On the <b>Relationship Detail</b> page, Indicate the <b>New Change Reason</b> and <b>New Reported Date</b> as applicable before updating the record</p> <ol style="list-style-type: none"><li>1. Confirm the Parent/Child Relationship is indicated between the <b>First Individual</b> and <b>Second Individual</b>.</li><li>2. Select the checkbox <b>Has Parental Control</b> and/or <b>Responsible Relative</b>, as applicable.</li><li>3. Click <b>Save and Return</b> to update the record.</li></ol> <p>Quick Guide Change Reason is available in the LMS for additional information</p>	<p>The screenshot shows the CalSAWS interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The main menu has tabs for Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. On the left, a sidebar lists various sections: Customer Information, Person Search, Non Financial, Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship (highlighted), Citizenship, Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, Customer Options, and Money Mngmt. The main content area is titled 'Relationship Detail' and contains several fields: 'Change Reason' with a dropdown menu, 'New Change Reason' with a dropdown, 'New Reported Date' with a date picker, 'Change Reason' with a text input (Intake), 'Reported Date' with a date input (05/25/2021), 'First Individual' with a dropdown (26F), 'Relationship' with a dropdown (Parent (Biological/Adoptive)), 'Second Individual' with a dropdown (8M), 'Responsible Relative' checkbox, 'Has Parental Control' checkbox (checked), 'Begin Date' with a date input (09/22/2013), 'End Date' with a date input, 'Verified' with a dropdown (Verified), and buttons for 'Images', 'Save and Return', and 'Cancel'. Annotations include a red box around the 'First Individual', 'Relationship', and 'Second Individual' fields with a yellow circle '1' next to it; a red box around the 'Responsible Relative' and 'Has Parental Control' checkboxes with a yellow circle '2' next to it; and a red box around the 'End Date' field with a yellow circle '3' next to it. Arrows point from the circles to the respective fields.</p>

### Steps to Clear Alert

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.

### 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

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Relationship List

Number of relationships remaining to be created: 0Continue

Search Results SummaryResults 1 - 6 of 6

Display by Relationship:  
(All Related)

From:

To:

View

Add

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
Consuela 40F	Parent (Biological/Adoptive)	Leilony 13F	Yes	2010		Edit View History
	Parent (Biological/Adoptive)	Meraya 14F	Yes	2010		Edit View History
Meraya 14F	Sibling (full or half)	Leilony 13F	No	2009		Edit View History

### Steps to Clear Alert

33 Once back on **CalWORKs EDBC Summary** page, note that the CW program is now Active, and all AU members are currently aided.

### 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

► ABAWD

EDBC Results

CalWORKs EDBC Summary

\* - Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/19/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin  
Month: 05/2022

Reporting Type Reason:  
Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

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

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Meraya Z. 14F		MEM		Active	
Leilony V. 13F		MEM		Active	
Consuela M. 40F		MEM		Active	

Override Program Configuration

▼ Reporting Configuration

Name	Role	Adult/Child	Claiming	Deprivation
Meraya Z. 14F	MEM	Child	Federal	Absence
Leilony V. 13F	MEM	Child	Federal	Absence
Consuela M. 40F	MEM	Adult	Federal	

## Steps to Clear Alert

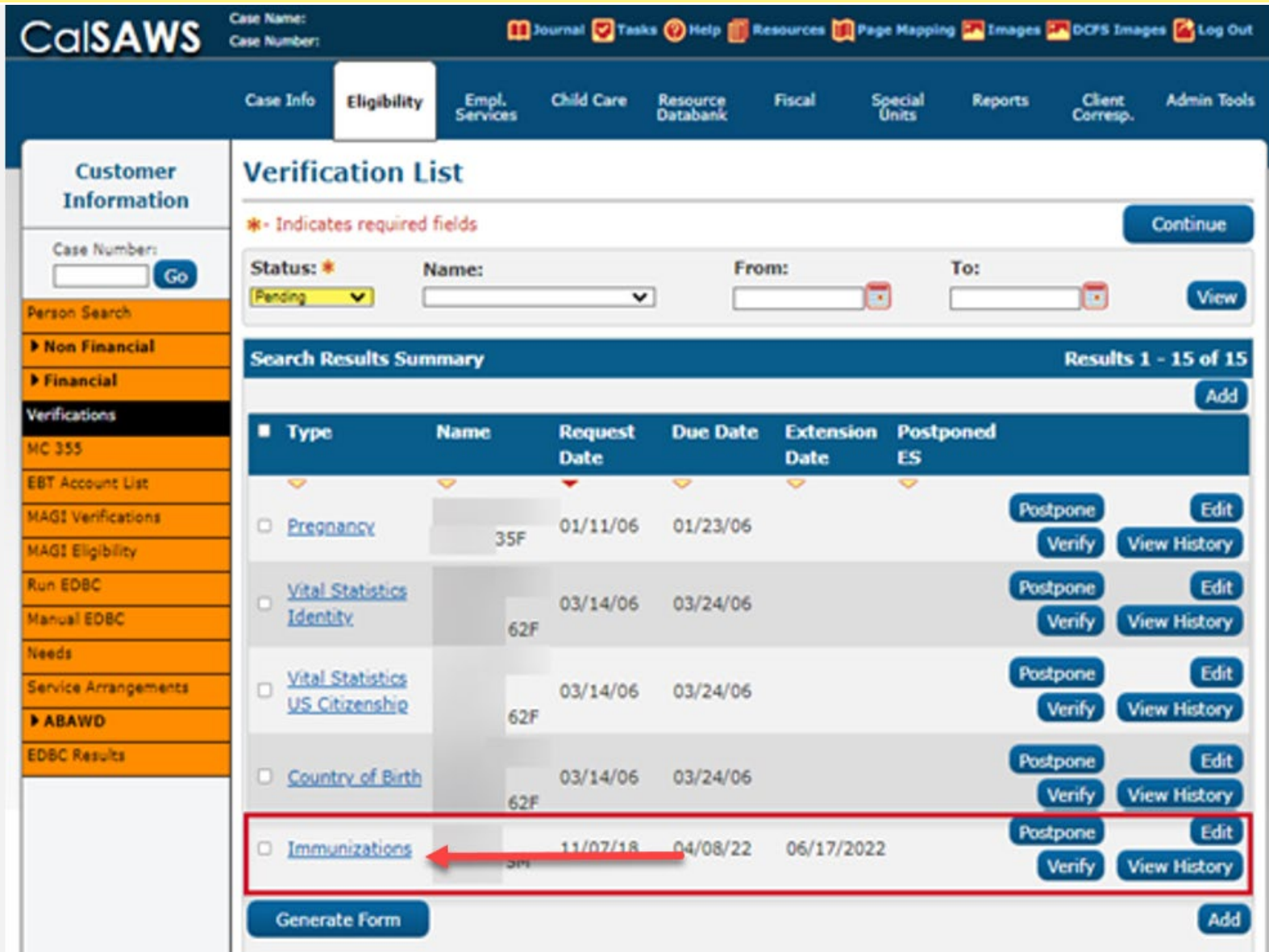
34

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.

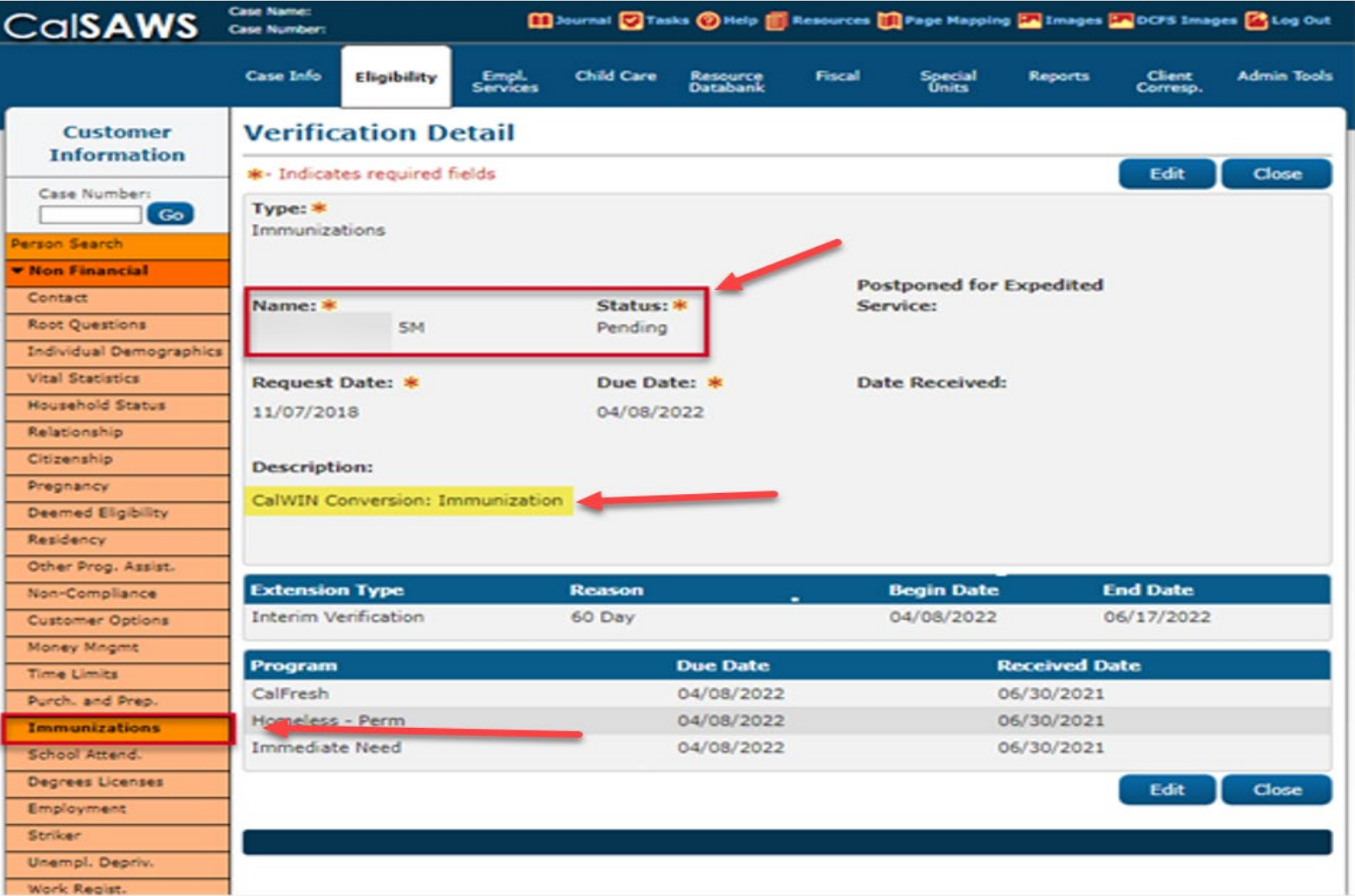
The user can access the immunization information by clicking on the verification hyperlink labeled **Immunization**.

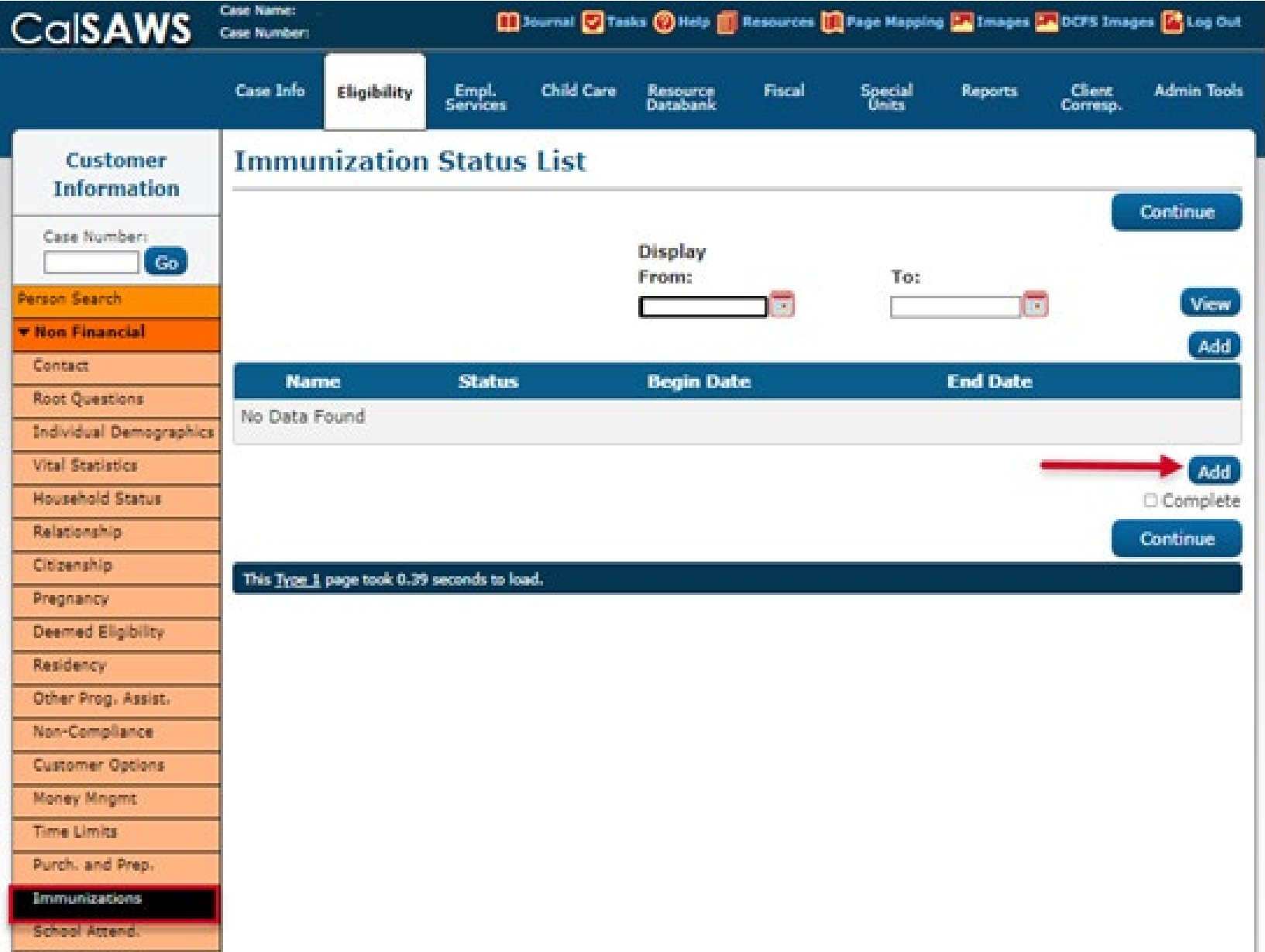
## Screenshot

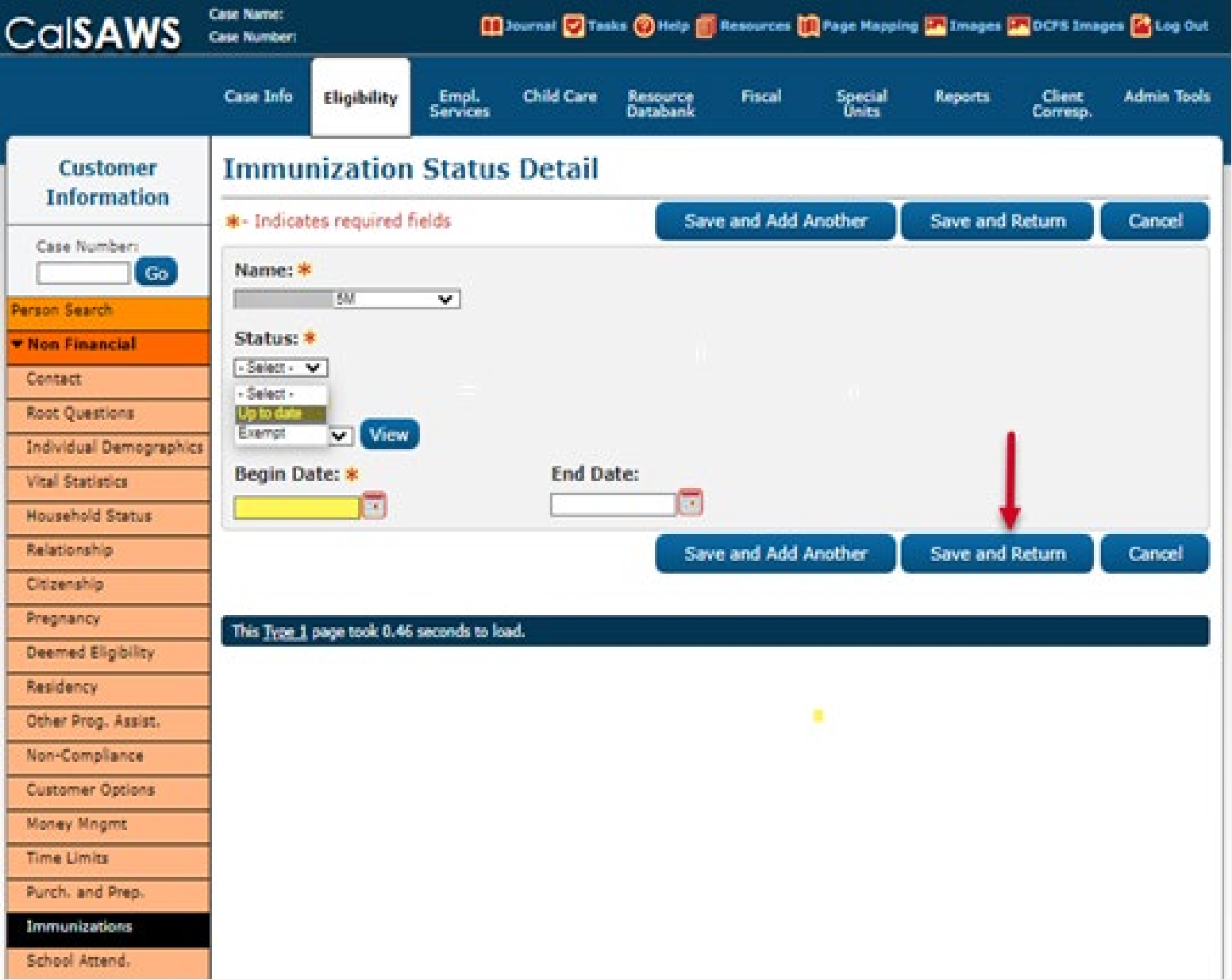


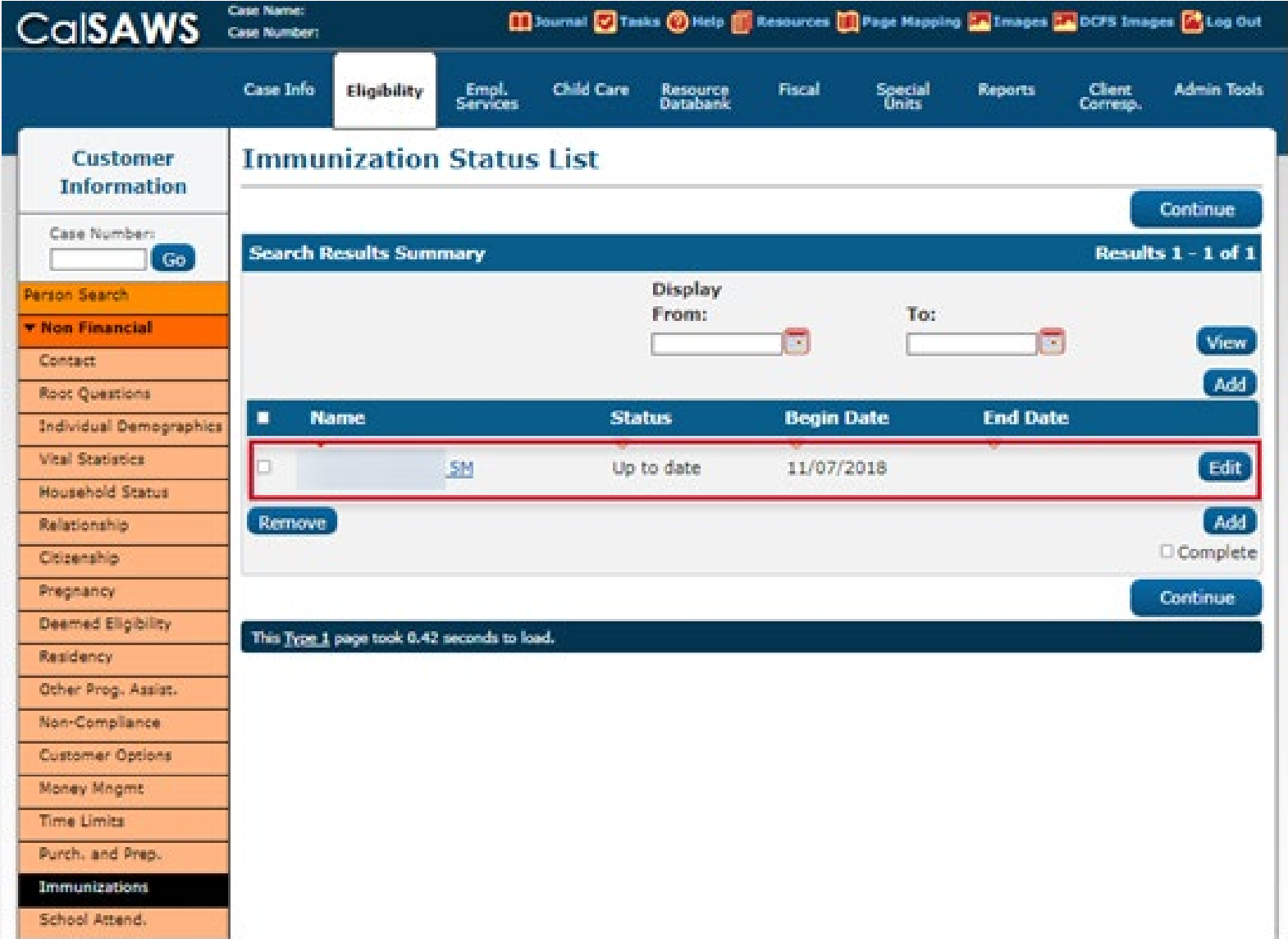
The screenshot displays the CalSAWS interface. On the left is a sidebar with navigation links: Customer Information, Person Search, Non Financial, Financial, Verifications, MC 355, EBT Account List, MAGI Verifications, MAGI Eligibility, Run EDBC, Manual EDBC, Needs, Service Arrangements, ABAWD, and EDBC Results. The main content area is titled 'Verification List' and includes search filters for Status (Pending), Name, From, and To. Below the filters is a 'Search Results Summary' table with 15 results. The table has columns for Type, Name, Request Date, Due Date, Extension Date, and Postponed ES. The 'Immunizations' row is highlighted with a red box and a red arrow pointing to it. The 'Immunizations' row shows a status of 'Pending', a request date of 11/07/18, a due date of 04/08/22, and an extension date of 06/17/2022. The 'Immunizations' row also has buttons for Postpone, Edit, Verify, and View History.

Type	Name	Request Date	Due Date	Extension Date	Postponed ES
<input type="checkbox"/> <a href="#">Pregnancy</a>	35F	01/11/06	01/23/06		
<input type="checkbox"/> <a href="#">Vital Statistics Identity</a>	62F	03/14/06	03/24/06		
<input type="checkbox"/> <a href="#">Vital Statistics US Citizenship</a>	62F	03/14/06	03/24/06		
<input type="checkbox"/> <a href="#">Country of Birth</a>	62F	03/14/06	03/24/06		
<input type="checkbox"/> <a href="#">Immunizations</a>	3M	11/07/18	04/08/22	06/17/2022	

Steps to Clear Alert		Screenshot
35	<p>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 <b>CalWIN Conversation Immunization</b>, an indication to the user that the immunization record previously had a <b>Good Cause</b> entry in CalWIN.</p> <p>The User will need to click on the <b>Immunization</b> tab located in the orange navigation bar to the left of the screen. Located under the <b>Non Financial</b> column.</p>	

Steps to Clear Alert		Screenshot
36	<p>The user will be directed to the Immunization Status List.</p> <p>Any existing Immunization records that converted over from CalWIN will be visible on this page.</p> <p>The user will need to create an Immunization record for the child in order to update the status.</p> <p>To add an Immunization record, the user will click the <b>Add</b> button located at the lower right side of the page.</p>	 <p>The screenshot shows the CalSAWS interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCPS Images, and Log Out. The left sidebar contains a 'Customer Information' section with a 'Case Number' field and a 'Go' button, followed by a list of navigation options: 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, Money Mngmt, Time Limits, Purch. and Prep., Immunizations (highlighted), and School Attend. The main content area is titled 'Immunization Status List' and features a table with columns: Name, Status, Begin Date, and End Date. The table currently displays 'No Data Found'. To the right of the table, there are buttons for 'Continue', 'View', 'Add', and 'Complete'. A red arrow points to the 'Add' button. At the bottom of the page, a status bar indicates 'This Type 1 page took 0.39 seconds to load.'</p>

Steps to Clear Alert		Screenshot
37	<p>The user will be directed to the <b>Immunization Status Detail</b>, where the user will be required to:</p> <ol style="list-style-type: none"><li>1. Select the <b>Child's</b> name from the drop down menu</li><li>2. Select the <b>Status</b> for the immunization record<ol style="list-style-type: none"><li>a. <b>Up to date:</b> 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 “<b>Good Cause</b>” in CalWIN.</li><li>b. <b>Exempt:</b> This status will be selected if the child meets one of the exemptions to immunization set forth by program rules and regulations.</li></ol></li><li>3. The user will enter a <b>Begin Date</b></li><li>4. Click <b>Save and Return</b></li></ol>	 <p>The screenshot shows the CalSAWS interface. On the left is a sidebar menu with categories like Customer Information, Person Search, Non Financial, and various data entry sections. The main area is titled 'Immunization Status Detail'. It contains a form with the following fields: 'Name' (a dropdown menu), 'Status' (a dropdown menu with 'Up to date' selected), 'Begin Date' (a date input field), and 'End Date' (a date input field). There are two sets of buttons: 'Save and Add Another', 'Save and Return', and 'Cancel' at the top and bottom of the form. A red arrow points to the 'Save and Return' button at the bottom. A status bar at the bottom of the page indicates 'This page took 0.46 seconds to load.'</p>

Steps to Clear Alert		Screenshot
38	The user will be navigated back to the Immunization Status List, where the newly created Immunization record will display.	

Steps to Clear Alert

- 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

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

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

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

Program Status: Discontinued

Program Status Reason: No Appl - Req Person

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Person 1		MEM		Discontinued	No Appl - Req Person
Person 2		MEM		Discontinued	No Appl - Req Person

Override Program Configuration

Reporting Configuration

Work Eligibility

Steps to Clear Alert

- 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.

Screenshot

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number:  
  
Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Application Questions

Negative Action

New Program

New Person

Hide Person

EBT Account List

Issuance History

Auxiliary Authorization List

Expungement History

Child Support Collections

Time Limit Aid Summary

Housing Support

Home Visiting

Legacy Case

Confidentiality

ICT Summary

IAT Summary

MAGI Case Search

Customer Contact History

SB 87

Invoice History

CalWORKs Detail

\*- Indicates required fields

View HistorySave and ReturnCancel

Date: \*  
  
View Date

Program Information

Status: \*Active

Status Reason:

Source: \*Self-Service Portal

Application Date: \*07/13/2021  
Edit

RE Begin Month:07/2021

RE Due Month: \*06/2022

Reporting Type:Semi-Annual Reporting

SAR Due Month:12/2021

Automatically Reassign When Activated:  
No

Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees
	Primary Applicant/Recipient	09/01/2021		Edit
	Payee	05/26/2021		Edit
Add				

Program Persons

Name	Role	Role Reason	Status	Status Reason
Person 1	MEM		Active	Edit
Person 2	MEM		Active	Edit
Person 3	MEM		Denied	
RescindReapply				

Steps to Clear Alert

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

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number:  
  
Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Application Questions

Negative Action

New Program

New Person

Hide Person

EBT Account List

Issuance History

Auxiliary Authorization List

Expungement History

New / Reapplication Detail

\*- Indicates required fields

Save and ReturnCancel

View Date:  
10/01/2022

Program Type:  
CalWORKs

Primary: \*

Application Date: \*

Requested BDA: \*

Source:  
Self-Service Portal

Cash-based Medi-Cal BDA:

<input checked="" type="checkbox"/>	Name *	DOB	Role	Role Reason	Status	Status Reason
<input type="checkbox"/>	Person 2		MEM		Active	
<input checked="" type="checkbox"/>	Person 3		MEM		Denied	
<input type="checkbox"/>	Person 1		MEM		Active	

Save and ReturnCancel

This Type 1 page took 0.41 seconds to load.

Steps to Clear Alert		Screenshot
40	<p>Once all data collection pages have been updated, the User can run EDBC, review and accept program determinations, and save the new EDBC results.</p> <p>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.</p> <p>Navigate back to the <b>Case Summary</b> page.</p> <p>The case review is complete!</p>	 <p>The screenshot shows the CalSAWS interface. At the top, there's a navigation bar with the CalSAWS logo and links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a secondary 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 includes a search bar for Case Number and County, a 'Go' button, and a list of search options: Person Search, EBT Account Search, Application Registration, Case Summary (highlighted), Contact, Authorized Representative, Application Questions, and Negative Action. Below the search bar is a 'Companion Cases' section 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!'.</p>