

Program Person Role Mismatch

Priority Level: 2

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 is run in CalSAWS, the Program Person Role does not match the last saved CalWIN EDBC determination. Person roles such as MEM (Member), UP (Unaided Person), FRE (Financially Responsible – excluded) or FRI (Financially Responsible – Excluded) are mismatched between converted CalWIN EDBC data and the new CalSAWS EDBC run.

Run EDBC in CalSAWS to find the Person Role mismatches and compare to the last saved converted CalWIN EDBC. Based on the differences, Users will need to verify the results, update the data collection records, if applicable, take action based on county policy and authorize the EDBC results.

Eligibility Roles	Role Definition	Examples
MEM (Member)	An applicant who has applied for or is eligible for assistance.	<ul style="list-style-type: none"> Assistance unit member MFBU member Aided CFHH member
MMO (Medi-Cal Member Only)	A person who is not eligible for cash assistance but is eligible for categorical cash-based Medi-Cal. These case members are financially responsible to the case. They are also included in the unit size.	<ul style="list-style-type: none"> CalWORKs or RCA penalized person 18 or older, CalWORKs IPV (after 12/31/1997) CalWORKs penalized 16–17-year-old Infant Supplemental Payment child
FRI (Financially Responsible - Included)	<p>A person who is not eligible for assistance but is financially responsible to the program and is included in the unit size.</p> <p>A person who has declined eligibility is also assigned the FRI role.</p>	<ul style="list-style-type: none"> CalWORKs and Medi-Cal unaided step relative CalWORKs undocumented alien CalWORKs fleeing or drug felons (after 12/31/1997) if they have countable income CalWORKs IPV (before 1/1/1998) person Medi-Cal non-cooperating Customer Medi-Cal person with no linkage Medi-Cal declined eligible person
FRE (Financially Responsible - Excluded)	A person who is not eligible for assistance but is financially responsible to the program and is excluded from the unit size.	<ul style="list-style-type: none"> CalWORKs and CalFresh sanctioned person CalFresh undocumented alien

		<ul style="list-style-type: none"> • CalWORKs fleeing or drug felons (after 12/31/1997) if they do not have countable income • CalFresh IPV or fleeing felon • Medi-Cal spouse or parent of a Pickle person • Medi-Cal QMB, SLMB, QI –1 person when the SSI budget methodology is used
FSO (Family Size Only)	A person who is not eligible for assistance and is not financially responsible to the program but is included in the unit size.	<ul style="list-style-type: none"> • Unaided step sibling of an eligible child with a parent who is financially responsible
UP (Unaided Person)	A person who is not receiving aid in the program and is not financially responsible to the program. A person who receives another type of assistance (for example SSI) is assigned this role. It is important that these people still apply for aid since they may link another person to the program.	

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 Person Role Mismatch	06/30/2022		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 commonly impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all of the information is entered as accurately as possible to allow for a correct determination to be made.

Example

Program Person Role Mismatch

Steps To Clear Alert	Screenshot
<p>1 Log in to CalSAWS by entering your Username and Password</p>	
<p>2 On the Homepage:</p> <ol style="list-style-type: none"> 1. Enter the case number and click on the submit button to be directed to the Case Summary page. <p>★ Note: this step is not necessary if already in the Case Summary page for the desired case</p>	

Steps To Clear Alert

Screenshot

★ Note the **Yellow Banner** on the **Case Summary** Page

The screenshot shows the CalSAWS Case Summary page. At the top, there are navigation links: Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a menu with tabs: 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 fields for Case Name and County. Below that is a section for "Companion Cases" with a table for Case Number and Case Name, and an "Add" button. A "Display:" section shows a date of 07/01/2022 and a "View" button. At the bottom, a yellow banner with a red border contains the following text: "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." A red arrow points from the "View" button down to the banner.

3 On the **Case Summary** Page:

1. Click on the **Eligibility** tab on the Global navigator.
2. Click on the **Customer Information** tab on the Local navigator.

This screenshot shows the same CalSAWS Case Summary page, but with the "Eligibility" tab selected in the Global navigator. The local navigator on the left has "Case Summary" selected. The "Eligibility" section is expanded, showing options: Workload Inventory, Case Summary, Customer Information, Reporting, and Distributed Documents. A red arrow labeled "1" points to the "Eligibility" tab in the Global navigator. Another red arrow labeled "2" points to the "Customer Information" option in the local navigator. The "Customer Information" option is highlighted with a mouse cursor. The yellow banner from the previous screenshot is still visible at the bottom.

Steps To Clear Alert

From the Contact Summary page:

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

Screenshot

The screenshot displays the CalSAWS web application interface. At the top, there is a navigation bar with the CalSAWS logo and various utility icons (Journal, Tasks, Help, Resources, Page Mapping, Imaging, Log Out). Below this is a secondary navigation bar 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 'Contact Summary' and includes a 'Continue' button. Below this is a 'Search Results Summary' section showing 'Results 1 - 8 of 8' and a 'Display' section with 'From:' and 'To:' date pickers and a 'View' button. The 'Address Information' section contains a table with columns for Person, Type, Address, Begin Date, and End Date. The table has two rows of data, with the first row showing 'Mailing' as the type. To the left of the main content is a 'Customer Information' sidebar with a 'Case Number:' field and a 'Go' button. Below this is a task navigator with several tabs: Person Search, Non Financial, Financial, GA/GR, Verifications, MC 355, EBT Account List, MAGI Verifications, MAGI Eligibility, Run EDBC (highlighted with a yellow circle and a red arrow), and Manual EDBC. The 'Run EDBC' tab is the third item in the list.

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.

Screenshot

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. 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

5 Run EDBC in CalSAWS to find the Person Role mismatches compared with the last CalWIN run Conversion EDBC.

The last saved CalWORKs EDBC results were for 03/2022. In this example, Users will compare the **07/2022 future month** CalWORKs EDBC result against the **03/2022 EDBC** result.

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
11/2021		Immediate Need	Regular	Accepted - Saved	Fail	11/17/2021	Conversion
03/2022		CalWORKs	Regular	Accepted - Saved	591.00	02/03/2022	Conversion
03/2022		CalFresh	Regular	Accepted - Saved	674.00	02/03/2022	Conversion
03/2022		Medi-Cal	Regular	Accepted - Saved	Details	02/03/2022	Conversion
07/2022		CalWORKs	Regular	Not Accepted	616.00	06/08/2022	Online EDBC Rules
07/2022		CalFresh	Regular	Not Accepted	608.00	06/08/2022	Online EDBC Rules
07/2022		Medi-Cal	Regular	Not Accepted	Details	06/08/2022	Online EDBC Rules

Steps To Clear Alert

When comparing the last saved EDBC results, there is an EDBC Program Person Role Mismatch as a person role and role reason changed from **FRE, CW Time Limit** in **03/2022**, to **MEM** having been added back as an active household member in **07/2022**.

Due to the recent CalWORKs policy change that took effect on May 1, 2022, active adult household members received an increase to their CalWORKs time limits from 48 months to 60 months' time on aid (ACL 20-113).

In the example to the right, the addition of 12 months' time on aid for the parent in the case in 07/2022, changed her program person role from **FRE** to **MEM**.

★ Note: A change in program policy is **not** the only reason a person's role and role reason will show an EDBC Mismatch.

There was also an EDBC Program Person Role Mismatch going from **MEM** to **MMO** for **Failure to Provide School Verification**.

Screenshot

CalWORKs EDBC Summary

* - Indicates required fields

Begin Month	End Month	Run Date	Run Status	Accepted By
03/2022		02/03/2022	Accepted - Saved	

EDBC Information

Non-Reporting Household Exemption: Annual Reporting
 Reporting Type Reason:
 Type: Regular
 Recalculation: No

Program Configuration

System Determination
 EDBC Source: Conversion
 Aid Code: K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
 Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Active	
		MEM		Denied	Doesn't Meet Program Req.
		MEM		Active	
		MEM		Active	
		MEM		Active	
		MEM		Denied	Doesn't Meet Program Req.
		FRE	CW Time Limit	Active	

CalWORKs EDBC Summary

* - Indicates required fields

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/08/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin Month: 11/2021
 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
		MEM		Active	
		MEM		Active	
		MEM	FTP School Verif	Active	
		MEM		Active	
		MEM		Active	

Steps To Clear Alert

- 6 From the **CalWORKs EDBC Summary** page, navigate to the Time Limits Summary page to review time limit records.
 1. In the **Task** navigation bar, click on the **Non-Financial** caret.
 2. Click the **Time Limits** hyperlink in the **Task** navigation bar.

Screenshot

Case Name: [Redacted] Case Number: [Redacted]

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: [Redacted] Go

Person Search

Non Financial

- 1 Contact
- Root Questions
- Individual Demographics
- Vital Statistics
- Household Status
- Relationship
- Citizenship
- Pregnancy
- Deemed Eligibility
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt
- 2 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		06/09/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin
Month: 11/2021

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
		MEM		Active	
		MMO	FTP School Verif	Active	
		MEM		Active	
		MEM		Active	
		MEM		Active	

Steps To Clear Alert

7 For instruction on how to add, correct or remove cash aid time limit records, refer to **Job Aid: JA Case Aid Time Limits.**

Job Aid Case Aid Time Limits also provides instructions on requesting, approving, or denying time limit extensions.

Screenshot

The screenshot shows the CalSAWS interface with the 'Eligibility' tab selected. The left sidebar contains a 'Customer Information' menu with 'Time Limits' highlighted. The main content area is titled 'Time Limit Summary' and includes an 'ABAWD' table and a 'Cash-Aid' table.

ABAWD Table:

Name	Begin Month	End Month	
[Redacted]	01/2020	12/2022	View History
[Redacted]	01/2017	12/2019	View History

Cash-Aid Table:

Name	TANF Used Months	TANF Remaining Months	CalWORKs Used Months	CalWORKs Remaining Months
<input type="checkbox"/> [Redacted]	0	60	0	60
<input type="checkbox"/> [Redacted]	48	12	48	12
<input type="checkbox"/> [Redacted]	48	12	48	12
<input type="checkbox"/> [Redacted]	0	60	0	60

At the bottom of the Cash-Aid section, there is a 'Remove' button, a 'Name' dropdown menu with a red asterisk, and an 'Add' button.

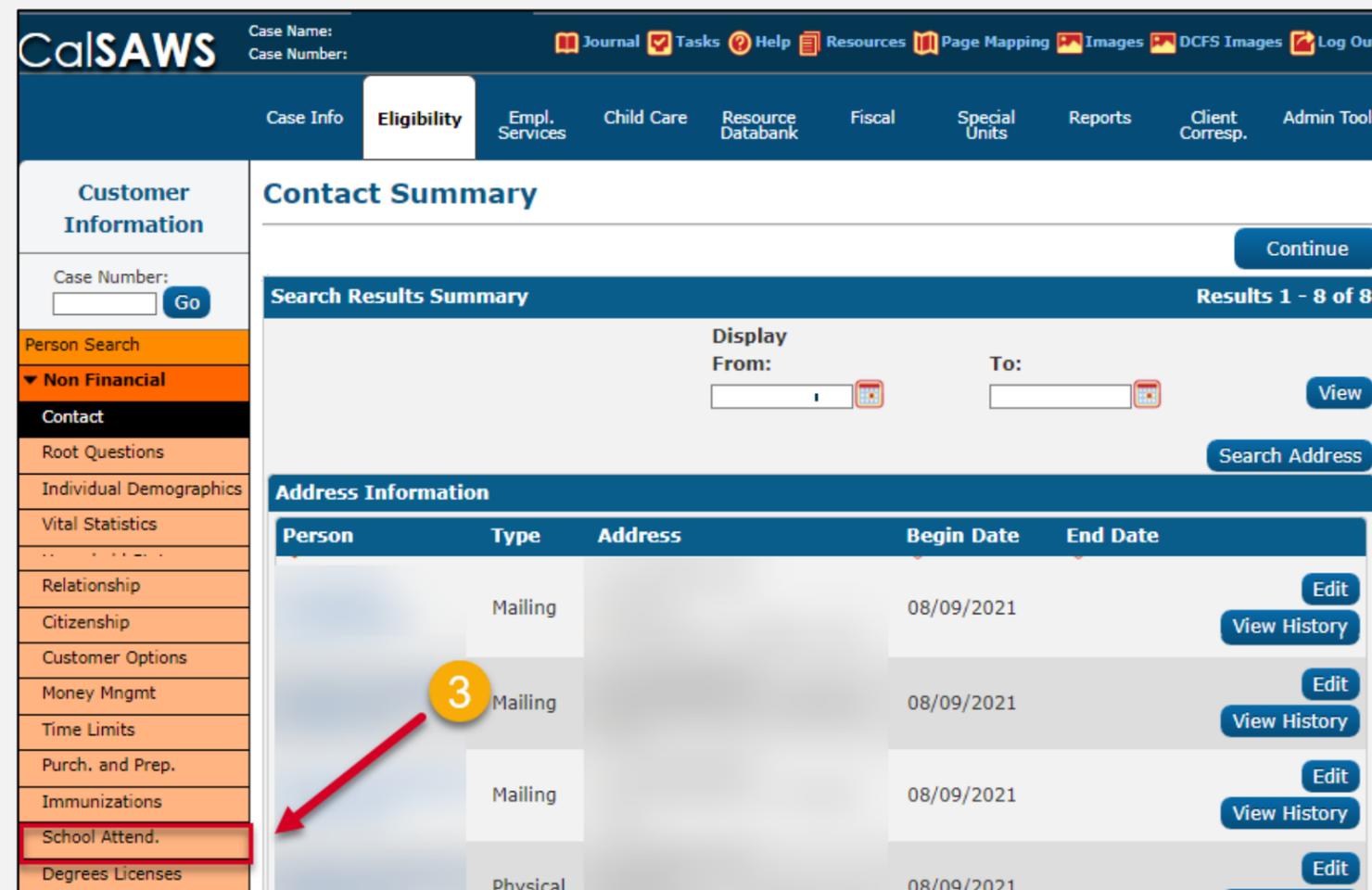
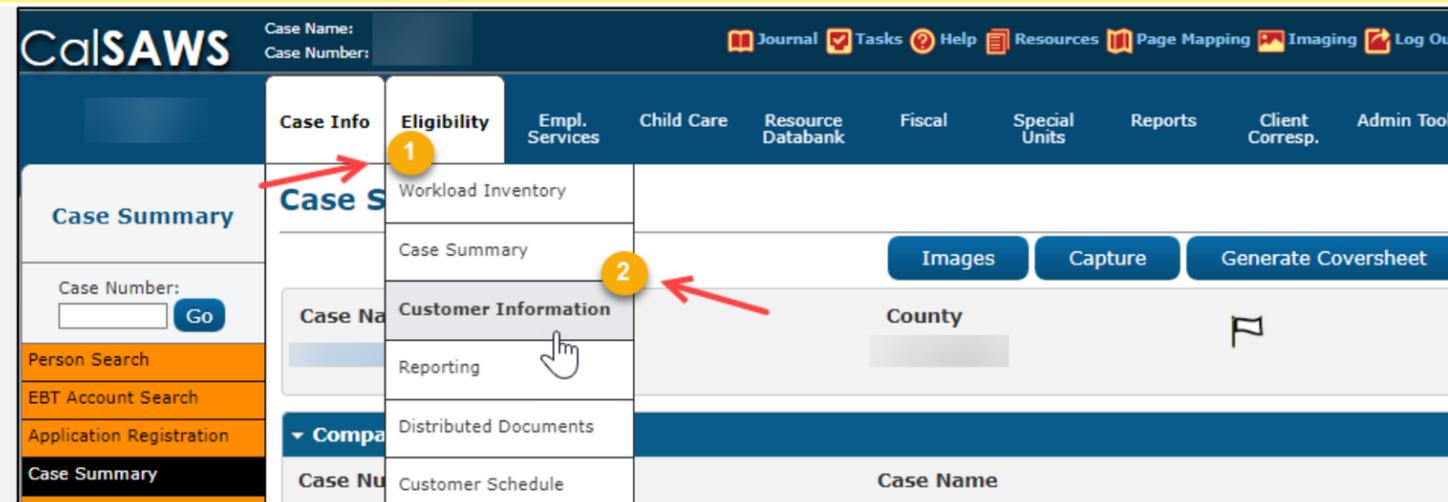
Steps To Clear Alert

8 To navigate to the **School Attendance Status Detail** Page:

1. Click on the **Eligibility** tab on the Global navigator
2. Click on the **Customer Information** tab on the Local navigator.

3. Click the **School Attend.** hyperlink on the **Task** navigator bar.

Screenshot



Steps To Clear Alert

9 For instruction on how to add and edit school attendance information, refer to **Job Aid: JA School Attendance Information-Add and Edit**



Note: While school enrollment information is entered on the **School Attendance Detail** page, school attendance status information is entered on the **School Attendance Status Detail** page.

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

Case Summary

Case Number:

Person Search
Case Summary
Contact
Child Care Needs
Child Care Program
Child Care Certificates
Individual Demographics
Relationships
Employment
SIP
School Attend.

School Attendance List

Root Questions

Search Results Summary Results 1 - 2 of 2

Display From: To:

	Name	Name of School	Begin Date	End Date	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	01/28/2020		<input type="button" value="Edit"/> <input type="button" value="View History"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	01/28/2020		<input type="button" value="Edit"/> <input type="button" value="View History"/>

Steps To Clear Alert

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

Both HH Members are Discontinued for "Ineligible Non-Citizen" Role Reason. This can be caused due to a required update to the Citizenship Section Code.

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

The following Job Aids are available to assist in CalSAWS:

Citizenship and Sponsorship - Add or Edit Vital Statistics

Screenshot

The screenshot shows the CalSAWS interface for the 'CalFresh EDBC Summary' page. The navigation menu on the left includes 'Citizenship', which is highlighted with a red box and a red arrow pointing to it, with a yellow circle containing the number '1' next to it. The main content area displays the following information:

- Case Info:** Case Name, Case Number, Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, Log Out.
- Navigation:** Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., Admin Tools.
- Customer Information:** Case Number: [input] Go, Person Search, Non Financial, Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship, Citizenship (highlighted), Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, Customer Options, Money Mngmt, Time Limits, Purch. and Prep., Immunizations.
- CalFresh EDBC Summary:**
 - * - Indicates required fields
 - Buttons: Change Reason, Accept, Cancel
 - Table:

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, Program Status: Discontinued, SUAS Eligible: No, Program Type: Regular, Program Status Reason: No Eligible Mem
 - Note: Overridden rows are in bold.
 - Table:

Name	DOB	Role	Role Reason	Status	Status Reason
Baisen 84M		FRE	Ineligible Non Citizen	Discontinued	No Eligible Mem
Ane 80F		FRE	Ineligible Non Citizen	Discontinued	No Eligible Mem
 - Buttons: Override Program Configuration

Steps To Clear Alert

11 From the **Citizenship Status List** Page:

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

Screenshot

The screenshot shows the CalSAWS interface. At the top, there is a navigation bar with the CalSAWS logo and various utility icons. 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 'Citizenship Status List' and includes a 'Continue' button. There are sections for 'Root Questions' and 'CalHEERS Verifications'. A 'Search Results Summary' section shows 'Results 1 - 2 of 2' with 'Display From:' and 'To:' fields. Below this is a table titled 'Non-Citizens' with the following data:

Name	Citizen Type	Begin Date	End Date
Baisen 84M	Lawful Permanent Resident	11/22/2004	
Ane 80F	Lawful Permanent Resident	06/17/2019	

The 'Ane 80F' row is highlighted with a red border. A yellow circle with the number '1' is positioned over the 'Edit' button for this row, with a red arrow pointing to it. Other buttons like 'View History', 'Remove', and 'Add' are also visible.

12 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. The 'Change Reason' section at the top contains two dropdown menus: 'New Change Reason' and 'New Reported Date', both marked with a red asterisk to indicate they are required fields. A red double-headed arrow connects these two fields. Below this, the 'Document' section includes a dropdown menu for 'Document' (with the selected value 'I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code') and a text field for 'Document Number', both also marked with red asterisks. A red arrow points from the 'Document Number' field towards the 'Save and Return' button. The 'Section Code' dropdown menu is marked with a red asterisk and has a red arrow pointing to it. The 'Country of Citizenship' dropdown menu is also marked with a red asterisk and has a red arrow pointing to it. At the bottom, the 'Verified' dropdown menu is marked with a red asterisk. The 'Save and Return' button is highlighted with a red arrow pointing upwards. The left sidebar shows a navigation menu with 'Citizenship' selected. The top navigation bar includes 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The top right corner has utility icons for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out.

Steps To Clear Alert

13  When information on a case is pending, Users should review and/or update the **Verification List** and **Verification Detail** pages to manage pending verifications.

To navigate and access the **Verification List Page**:

1. Place the cursor over **Eligibility** on the **Global** navigation bar.
2. Select **Customer Information** from the **Local** navigator.
3. Click **Verifications** on the **Task** navigation bar.

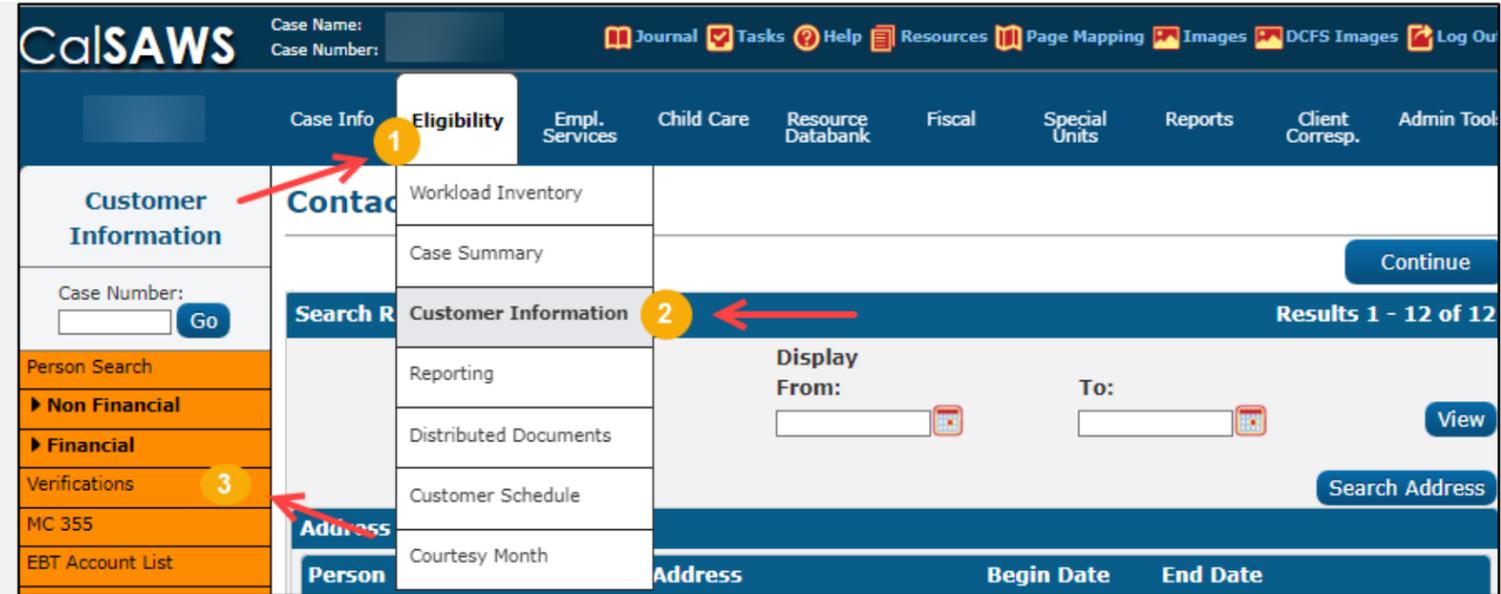
The Verification list page will list and display any verifications that are in a pending status on the data collection pages.

On this page, Users can verify verifications and also send out a CW 2200 form.

Follow county policy when adding verifications to the **Verification List** page.

For information on how to add, edit and view the details of verification requests, see Job Aid: **JA Verifications – Manage**

Screenshot



Steps To Clear Alert

Screenshot

Case Name: [Redacted] Case Number: [Redacted]

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: [Input] **Go**

Person Search

- ▶ Non Financial
- ▶ Financial
- Verifications**
- MC 355
- EBT Account List
- MAGI Verifications
- MAGI Eligibility
- Run EDBC
- Manual EDBC
- Needs
- Service Arrangements

Verification List

*- Indicates required fields **Continue**

Status: * From: [Input] To: [Input] **View**

Pending

Search Results Summary Results 1 - 8 of 8 **Add**

Type	Name	Request Date	Due Date	Postponed ES	
<input type="checkbox"/> Name/Identity	[Redacted]	01/07/14	01/17/14		Postpone Verify Edit View History
<input type="checkbox"/> SSN	[Redacted]	01/07/14	02/06/14		Postpone Verify Edit View History
<input type="checkbox"/> Date of Birth	[Redacted]	01/07/14	04/07/14		Postpone Verify Edit View History

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, and accept the new EDBC budget results.

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



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

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

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

Follow county policy when Troubleshooting EDBC Results.

Additional CalSAWS Job Aids are available in CalSAWS in the **Help Icon** located in the Utilities navigator:

JA EDBC – Troubleshooting Incorrect Results

JA EDBC - Online Definitions and Troubleshooting

Screenshot

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log O

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tool

Customer Information

Case Number: Go

Person Search

- Non Financial 1
- Financial
- Verifications
- MC 355
- EBT Account List
- MAGI Verifications
- MAGI Eligibility
- Run EDBC

Run EDBC

*- Indicates required fields

Benefit Processing Range:

Begin Month: * 07/2022 2 End Month: * 07/2022

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

Change Reason Run EDBC 3 Cancel

Change Reason Run EDBC Cancel

Steps To Clear Alert

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

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.

Screenshot

The screenshot shows the CalSAWS interface with the 'EDDB List' page active. The left sidebar contains navigation options like 'Customer Information', 'Person Search', and 'Run EDDB'. The main content area includes search filters and a table of results. The table has the following data:

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDDB 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 EDDB Rules
07/2022		CalWORKs	Regular	Accepted - Saved	733.00	06/11/2022	Online EDDB Rules
07/2022		CalFresh	Regular	Not Accepted	571.00	06/11/2022	Online EDDB Rules
07/2022		Medi-Cal	Regular	Not Accepted	Details	06/11/2022	Online EDDB Rules

Steps To Clear Alert

16 Users will be directed to a PDF preview of the NOA. Users will have the following options:

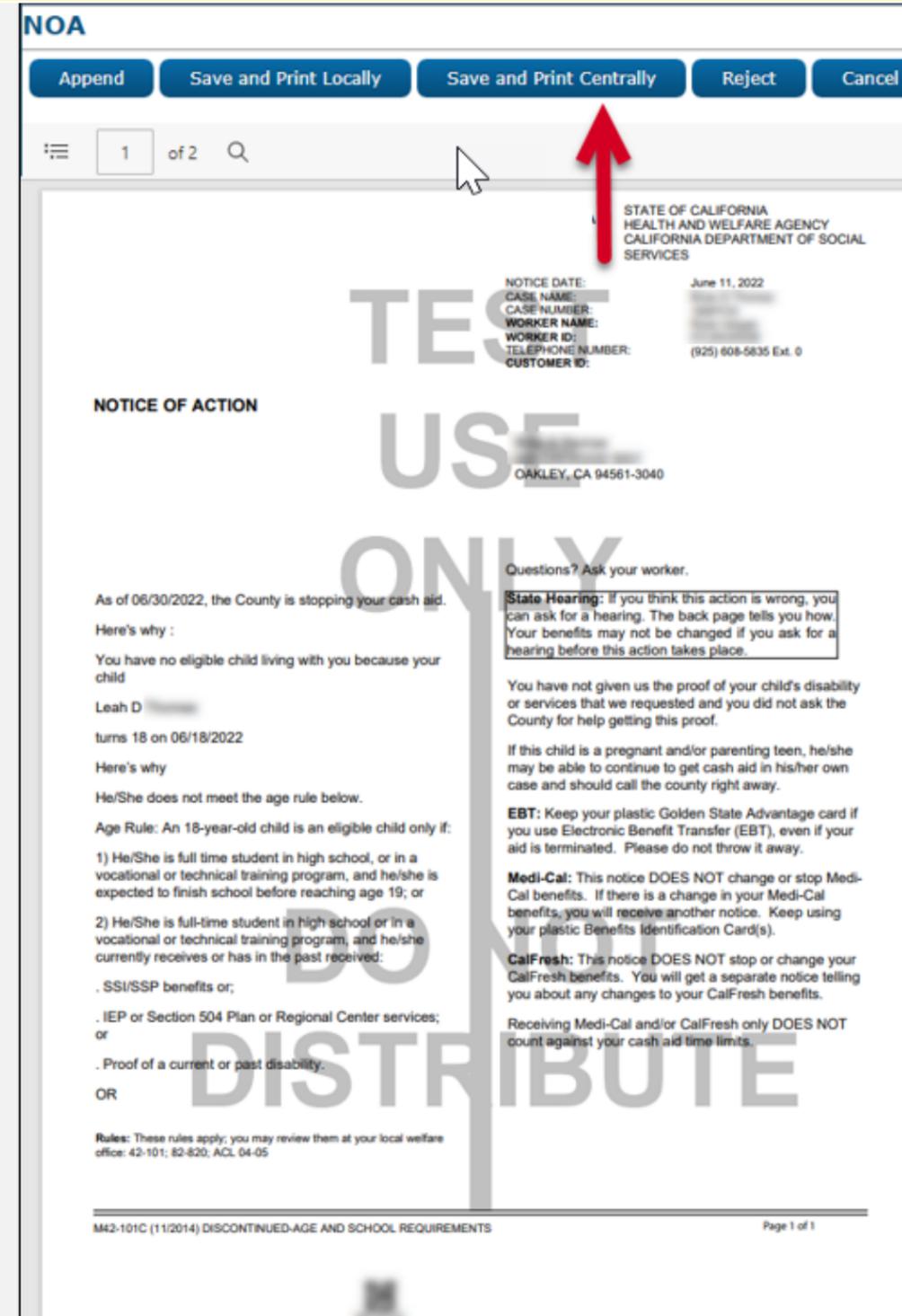
- **Append:** User can make limited edits to NOA if necessary
- **Save and Print Locally:** User will save NOA to the case and will need to manually print the NOA for distribution.
- **Save and Print Centrally:** User will save the NOA to the case and the NOA will be sent out by central printing during nightly batch
- **Reject:** User will reject the NOA, the NOA will still display in the case as a rejected status
- **Cancel:** User can cancel, this will leave the NOA in a “pending review” status.

Select the appropriate status for the NOA. This will update the status in the **Distributed Document Search** page.

Once the NOA are reviewed, accepted, and saved, journal the actions taken according to navigate back to the **Case Summary** page.

Note: If the NOA is not reviewed, it will go out by way of an overnight batch process.

Screenshot



Steps To Clear Alert

- 17 Journal the action taken according to county policy.
- The Yellow Banner will no longer appear on the case.
- The case review is complete!

Screenshot

