



Program Person Status Mismatch

Priority Level: 1

Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care, GA/GR, Medi-Cal, Nutrition Benefits, 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 during conversion cutover in CalSAWS, the Program Person Status Mismatch does not match what was determined in the CalWIN System. Person Statuses are mismatched like Active or Denied or Discontinued between the last saved CalWIN EDBC results and the converted data in CalSAWS.

Run EDBC in CalSAWS to find the Person Status mismatches and compare to the last saved and 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.

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

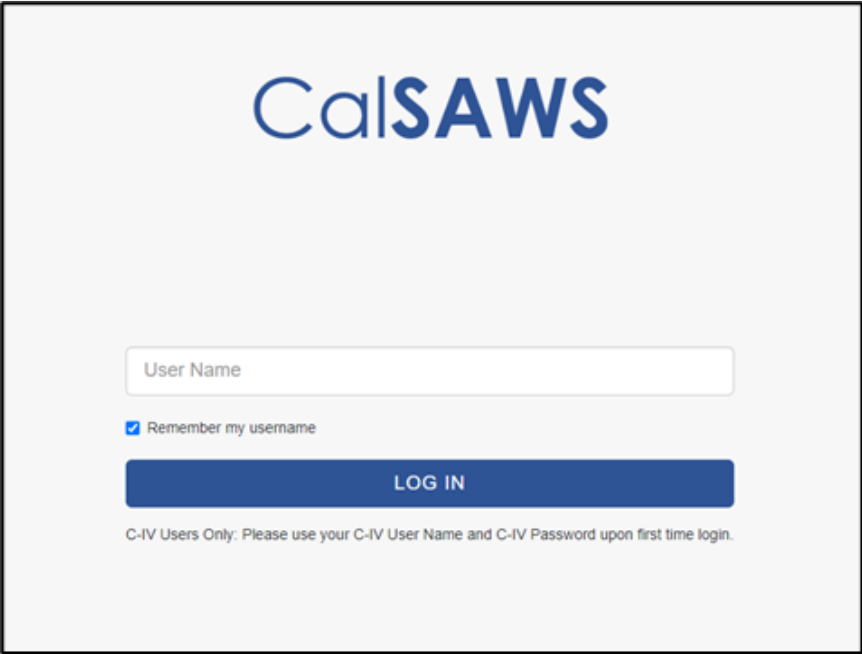
COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY	SSA_INCOME	SSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalWORKs	Program Person Status Mismatch	06/30/2022		1		

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.



Example

Program Person Status Mismatch

Steps To Clear Alert		Screenshot
1	Log in to CalSAWS by entering your Username and Password	 The screenshot shows the CalSAWS login page. At the top is the CalSAWS logo. Below it is a 'User Name' input field. Underneath the field is a checked checkbox labeled 'Remember my username'. Below the checkbox is a blue 'LOG IN' button. At the bottom of the login area, there is a small note: 'C-IV Users Only: Please use your C-IV User Name and C-IV Password upon first time login.'
2	On the Homepage: 1. Enter the case number and click on the submit button to be directed to the Case Summary page. ★ Note: this step is not necessary if already in the Case Summary page for the desired case	 The screenshot shows the CalSAWS homepage. At the top is a dark blue header with the CalSAWS logo and a navigation bar with icons and labels for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below the header is a secondary navigation bar with links for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area has a 'Welcome,' message, a 'Worker ID:' label, and a 'Case Number:' label with an input field. A red arrow with a yellow circle containing the number '1' points to the Case Number input field. To the right of the input field is a blue 'Submit' button. At the bottom, there are two sections: 'Announcements' with columns for Type and Date, and 'Quick Links'.



Steps To Clear Alert		Screenshot
	★ Note the Yellow Banner on the Case Summary Page	



Steps To Clear Alert

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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.

From the Contact Summary page:

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

Screenshot

CalSAWS

Case Name:

Case Number:

Journal

Tasks

Help

Resources

Page Mapping

Imaging

Log Out

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Case Summary

Case S

Case Na

Case Nu

Workload Inventory

Case Summary

Customer Information

Reporting

Distributed Documents

Customer Schedule

Images

Capture

Generate Coversheet

County

Case Name

Case Number: Go

Person Search

EBT Account Search

Application Registration

Case Summary

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

Contact Summary

Continue

Search Results Summary

Results 1 - 8 of 8

Display From: To: View

Search Address

Address Information

Person	Type	Address	Begin Date	End Date	
	Mailing				Edit View History
	Physical				Edit



Steps To Clear Alert

Screenshot

- 4
- On the **Run EDBC** page:
1.

Select all applicable **Programs**
- ★

Note: Program fields must be selected first or the Begin and End Months will show grayed out.
2.

Populate your **Begin Month** and **End Month** with the next future Month. **Do not use multi-month EDBC to clear a Yellow Banner EDBC Mismatch alert..**
3.

Click **Run EDBC**
- ⚠

Ensure all programs on a case are selected when running EDBC as each program can have its own EDBC Mismatch reason. EDBC Mismatch follows program hierarchy and requires all programs be run at the same time to clear all EDBC Mismatch reasons on a case.
- When running EDBC, there are two types of validations that a User may experience if eligibility criteria is missing or pending.
- When experiencing a **Hard Validation**, EDBC cannot be run without the appropriate updates made to the data collection pages.
- When experiencing a **Soft Validation**, EDBC can still be run without making changes to the data collection pages. Follow your county policy.
- ★

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

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog On

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

*- Indicates required fields

Change ReasonRun EDBCCancel

Benefit Processing Range:

Begin Month: *End Month: *

07/202207/2022

ProgramStatusTimely Notice ExceptionReasonRun Reason

Medi-CalActive

CalWORKsActive

CalFreshActive

Change ReasonRun EDBCCancel

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog On

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

*- Indicates required fields

Change ReasonRun EDBC w/o VerificationsCancel

Benefit Processing Range:

Begin Month: *End Month: *

07/202207/2022

ProgramStatusTimely Notice ExceptionReasonRun Reason

CalWORKsActive

CalFreshActive

Medi-CalActive

The following verification(s) have not been received:

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



Steps To Clear Alert

Screenshot

- 5
- Run EDBC in CalSAWS to find the Person Status mismatches compared with the last CalWIN run Conversion EDBC.
- The last saved CalWORKs EDBC results were for **02/2022**. In this example, Users will compare the **07/2022** future month CalWORKs EDBC result against the **02/2022** EDBC result.
- Users should review EDBC results to ensure accuracy before accepting results.

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 List

Display by:
Program:
Type Reason:
Run Status:
From: 08/2022
To: 07/2022
Cancel
View

Search Results Summary
Results 1 - 7 of 7

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
06/2011		Immediate Need	Regular	Accepted - Saved	Fail	06/20/2011	Conversion
02/2022		CalWORKs	Regular	Accepted - Saved	1,116.00	01/04/2022	Conversion
02/2022		CalFresh	Regular	Accepted - Saved	826.00	01/04/2022	Conversion
02/2022		Medi-Cal	Regular	Accepted - Saved	Details	01/04/2022	Conversion
07/2022		CalWORKs	Regular	Not Accepted	1,116.00	06/08/2022	Online EDBC Rules
07/2022		CalFresh	Regular	Not Accepted	900.00	06/08/2022	Online EDBC Rules
07/2022		Medi-Cal	Regular	Not Accepted	Details	06/08/2022	Online EDBC Rules



Steps To Clear Alert

Screenshot

6 When comparing the last saved CalWORKs EDBC Summary results, there is an EDBC Program Person Status Mismatch as **Kaden, 18M** person status and status reason changed from **Active** in 02/2022, to showing **Discontinued** with a status reason of having reached **Age 18 Requirements**.



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 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

Continue to review and authorize EDBC results for any CalFresh and Medi-Cal programs.

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Special Arrangements

CalWORKs EDBC Summary

*- Indicates required fields

Close

Begin MonthEnd MonthRun DateRun StatusAccepted By

02/202201/04/2022Accepted - Saved

EDBC Information

Semi-Annual Reporting Period Begin Month: /2022

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Conversion

Aid Code: 32 - CW-TANF-Timed Out (State)

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Active	
		MEM		Active	
Kaden 18M		MEM		Active	
		MEM		Active	
		MEM		Discontinued	Doesn't Meet Program Req.

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Special Arrangements

CalWORKs EDBC Summary

*- Indicates required fields

Change ReasonAcceptCancel

Begin MonthEnd MonthRun DateRun StatusAccepted By

07/202206/08/2022Not Accepted

EDBC Information

Semi-Annual Reporting Period Begin Month: /2022

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 32 - CW-TANF-Timed Out (State)

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Active	
Kaden 18M		MEM		Discontinued	Age 18 Requirements
		MEM		Active	
		MEM		Active	

Override Program Configuration



Steps To Clear Alert

7 When comparing the last saved CalFresh EDBC Summary results from **2/2022** against the CalFresh EDBC Summary results for **07/2022**, the entire household status corresponds with the CalWORKs EDBC Summary results.



Remember to check for any missing verifications, reports received, or images awaiting review for potential case changes prior to running EDBC and authorizing future benefit EDBC results for both CalFresh (possible TCF) and Medi-Cal programs. Accept EDBC results if results are as expected.

The **Medi-Cal EDBC Summary** page will display the following:

- Benefit Month and Program Status
- EDBC Information
- Program Configuration
- Reporting Configuration
- Medi-Cal Summary

The eligibility for this household should reflect the accurate eligibility for the benefit program (Medi-Cal). The EDBC results can be saved by clicking the **Accept** button located on the top right or bottom right of the summary. Once the Medi-Cal program results have been saved, this will redirect Users to the **EDBC List** 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

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

CalFresh EDBC Summary

Indicates required fields

Close

Begin Month	End Month	Run Date	Run Status	Accepted By
02/2022		01/04/2022	Accepted - Saved	

EDBC Information

Semi-Annual Reporting Period Begin Month: /2022

Reporting Type Reason: Type: Regular Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Conversion

Aid Code: 32 - CW-TANF-Timed Out (State)

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Active	
		MEM		Discontinued	Separate P&P
		MEM		Active	
		MEM		Active	
		MEM		Active	
		MEM		Active	

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

ABAWD

EDBC Results

CalFresh EDBC Summary

Indicates required fields

Change Reason

Accept

Cancel

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: /2022

Reporting Type Reason: Type: Regular Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 32 - CW-TANF-Timed Out (State)

Program Status: Active

SUAS Eligible: No

Program Type: Regular

Note: Overridden rows are in bold.

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

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

ABAWD

EDBC Results

Medi-Cal EDBC Summary

Close

Begin Month	End Month	Run Date	Run Status	Accepted By
02/2022		01/04/2022	Accepted - Saved	

EDBC Information

Type: Regular

Recalculation: No

EDBC Ran for MAGI Only: Yes

Program Configuration

System Determination

EDBC Source: Conversion

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
Kevin 22M		MEM		Active		

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

ABAWD

EDBC Results

Medi-Cal EDBC Summary

Accept

Cancel

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

EDBC Information

Type: Regular

Recalculation: No

EDBC Ran for MAGI Only: Yes

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
Kevin 48M		UP	Gets CalWORKs	Active		
		MEM		Active		
		UP	Gets CalWORKs	Active		
		UP	Gets CalWORKs	Active		
		MEM		Active		
		UP	Gets CalWORKs	Active		



Steps To Clear Alert

Screenshot

- 8
- The **EDBC List** page will display the following:

 - A message to inform the user that a Notice of Action was created.
 - A **Preview NOA** button, which allows the user to view the notice prior to distribution.
 - A **Save and Continue** button, which allows the user to save all the actions taken.

Review the NOA's for accuracy:

1. Click the **Save and Continue** button. This will direct the user to the **Distributed Documents Search** page, where the NOA will be in a **Pending Review** status.

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Imaging Log Out

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 Financial Verifications MC 355 EBT Account List MAGI Verifications MAGI Eligibility Run EDBC Manual EDBC Needs Service Arrangements ABAWD

EDBC List

• Medi-Cal NOA run is complete - NOA generated

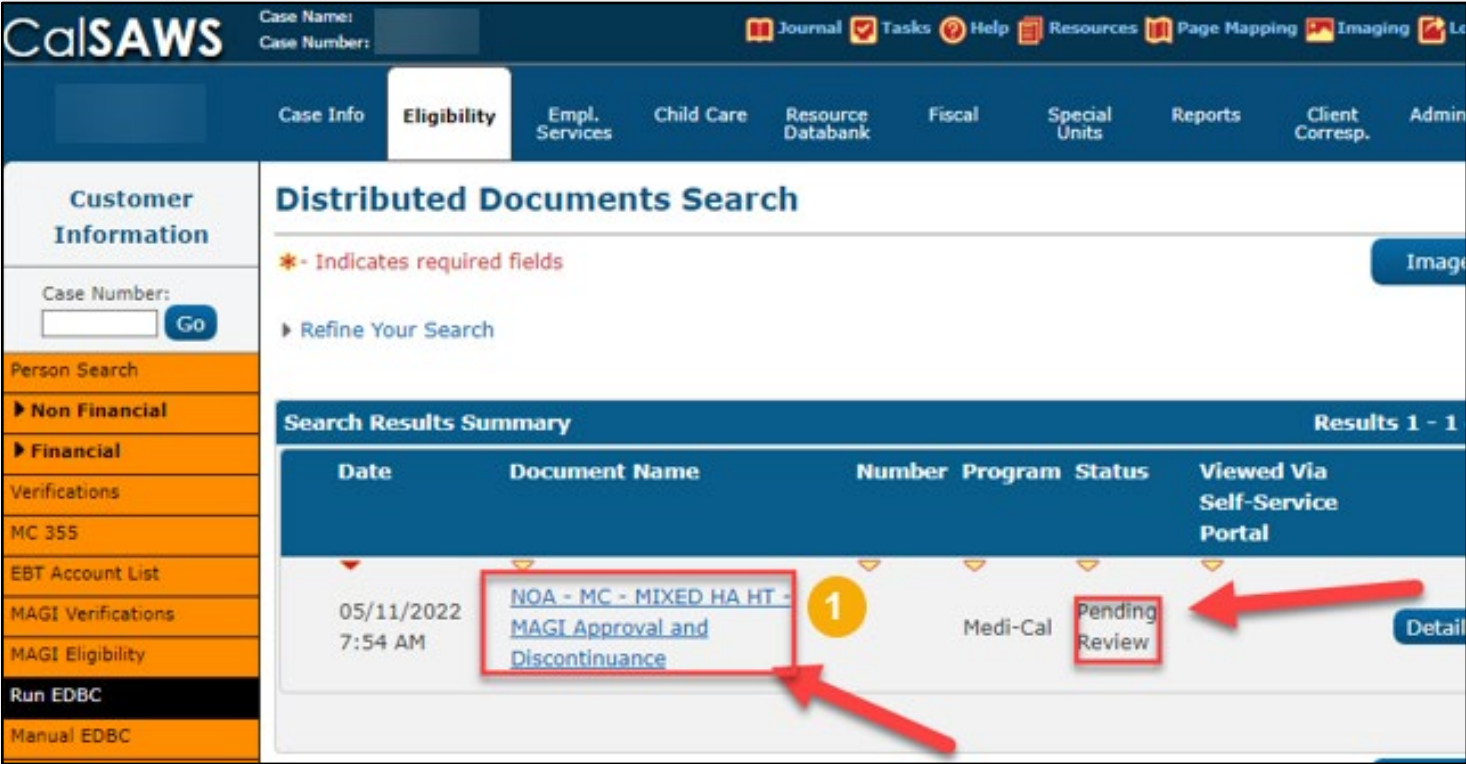
Display by: Program: Type Reason: Run Status: From: To: View

Search Results Summary Results 1 - 5 of 5

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
		Homeless - Temp	Regular	Accepted - Saved		08/03/2020	Conversion
		CalWORKs	Regular	Accepted - Not Saved		05/11/2022	Online EDBC Rules
		CalFresh	Regular	Accepted - Not Saved		05/11/2022	Online EDBC Rules
		Medi-Cal	Regular	Accepted - Saved		12/08/2021	Online EDBC Rules
		Medi-Cal	Regular	Accepted - Not Saved		05/11/2022	Online EDBC Rules

Preview NOAs Save and Continue Cancel



Steps To Clear Alert		Screenshot
9	In the Distributed Documents Search: 1. Click on the hyperlink for the NOA with the “Pending Review” status to view the NOA and select a method of distribution. If the NOA is not reviewed it will go out due to an overnight batch process.	



Steps To Clear Alert

- 10
- 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.

Screenshot

NOA

AppendSave and Print LocallySave and Print CentrallyRejectCancel

1 of 2

STATE OF CALIFORNIA
HEALTH AND WELFARE AGENCY
CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

NOTICE DATE: June 11, 2022
CASE NAME:
CASE NUMBER:
WORKER NAME:
WORKER ID:
TELEPHONE NUMBER: (925) 608-5835 Ext. 0
CUSTOMER ID:

TEST USE ONLY

NOTICE OF ACTION

OAKLEY, CA 94561-3040

Questions? Ask your worker.

State Hearing: If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

As of 06/30/2022, the County is stopping your cash aid.
Here's why :
You have no eligible child living with you because your child
Leah D
turns 18 on 06/18/2022
Here's why
He/She does not meet the age rule below.
Age Rule: An 18-year-old child is an eligible child only if:
1) He/She is full time student in high school, or in a vocational or technical training program, and he/she is expected to finish school before reaching age 19; or
2) He/She is full-time student in high school or in a vocational or technical training program, and he/she currently receives or has in the past received:
. SSI/SSP benefits or;
. IEP or Section 504 Plan or Regional Center services;
or
. Proof of a current or past disability.
OR
Rules: These rules apply; you may review them at your local welfare office: 42-101; 82-820; ACL 04-05

EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. Please do not throw it away.
Medi-Cal: This notice DOES NOT change or stop Medi-Cal benefits. If there is a change in your Medi-Cal benefits, you will receive another notice. Keep using your plastic Benefits Identification Card(s).
CalFresh: This notice DOES NOT stop or change your CalFresh benefits. You will get a separate notice telling you about any changes to your CalFresh benefits.
Receiving Medi-Cal and/or CalFresh only DOES NOT count against your cash aid time limits.

MM2-101C (11/2014) DISCONTINUED-AGE AND SCHOOL REQUIREMENTS

Page 1 of 1



Steps To Clear Alert		Screenshot
13	Once the Notices of Actions are reviewed, accepted and saved, journal the action taken according to county policy. Navigate back to the Case Summary page. The Yellow Banner will no longer appear on the case. The case review is complete!	 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, 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 Name and County. Below this is a section for 'Companion Cases' with a table for Case Number and Case Name, and an 'Add' button. At the bottom, there's a 'Display:' section with a date filter (07/01/2022) and a 'View' button. A large red banner at the bottom of the page reads 'Yellow Banner cleared!'.