



CalSAWS | Running EDBC for Pre and Post Conversion Periods

Fact Sheet

Purpose

To provide instruction on when Online EDBC can be ran and when Manual EDBC will need to be ran.

For applications pending at the time of conversion, users can run online EDBC for the application month forward. For Ongoing programs, users can run online EDBC beginning the conversion month forward. In order to run EDBC for Ongoing programs for months prior to conversion, the user must run a Manual EDBC.

If the User is running Manual EDBC, they will need to determine the benefit manually or with the aid of the Simulation functionality within the read-only version of CalWIN.

Note: Manual EDC can be ran for any pre conversion month in which eligibility has been determined.

What Should You Do?

For a converted **Active Program** that needs to have EDBC ran for a pre conversion month: The user will need to run simulation in CalWIN Read-Only with budgets and then a Manual EDBC will need to be created in CalSAWS (for Supplements and or Over/Under Issuances).

- Note: All programs that converted as Active will be able to run Online EDBC effective the conversion month forward. Any months needed to be ran prior to conversion are considered a pre conversion month.

For a converted **Discontinued Program** that is rescinded. The user will need to run simulation in CalWIN Read-Only with budgets and then a Manual EDBC will need to be created in CalSAWS for months prior to the conversion month. Online EDBC can be ran effective conversion month forward.

For **Converted New Pending Programs Without** any prior application history: The user will be able to run "Online" EDBC from the application month forward.

For **Converted New Pending Programs With** prior application history: The user will be able to run "Online" EDBC from the latest application month forward. (See examples below for Wave 2)

Application Date	Program	Converted Pending Month	Converted Active	Manual EDBC	Online EDBC
01/07/2023	MC	01/2023			Yes – 01/2023 forward



02/24/2023	MC/CF	02/2023			Yes – 02/2023 forward
03/01/2023	CW/CF	N/A			Yes – 03/2023 forward
12/30/2022	CF/MC	12/2022			Yes – 12/2022 forward
05/2021	CF		Yes	All months prior to 03/2023	All Months 03/2023 forward
07/01/2022 02/04/2023	CF MC	N/A 02/2023	Yes	CF will need to have Manual EDBC's for all months prior to 03/2023	CF can have regular EDBC for 03/2023 forward. MC can be run 02/2023 forward

- **Note:** Retro-Medi-Cal is considered as a New Pending Program and will be ran with Online EDBC to determine eligibility for retro months.

Simulation

- When can simulation be used:
 - Simulation can be used to determine ongoing months prior to conversion.
- When can't simulation be used:
 - Simulation cannot be used to determine ongoing months prior to conversion of MAGI MC.

Conversion Months when considering Online EDBC

- **From the listed benefit month forward an Online EDBC can be run.**
 - Wave 1 November 2022
 - Wave 2 March 2023
 - Wave 3 May 2023
 - Wave 4 July 2023
 - Wave 5 September 2023
 - Wave 6 November 2023

Establishing a Manual EDBC for Over/Under Issuances

Determine the Month of Manual EDBC that needs to be ran and run Manual EDBC

1. Place cursor over **Eligibility** on the **Global** navigation bar and select **Customer Information** from the **Local** navigator.
2. Click the **Manual EDBC** link on the **Task** navigation bar.
3. Select the Benefit Month to be ran.
4. Select **Month Prior to CalSAWS** from the **Manual EDBC Reason** drop list.
5. Click the checkbox for the Program to be ran.
6. Click the **Create Manual EDBC** button.

Customer Information
Case Number: **Go**
Person Search
► Non Financial
► Financial
Verifications
MC 355
EBT Account List
MAGI Verifications
MAGI Eligibility
Run EDBC

Create Manual EDBC

***- Indicates required fields**

Benefit Month: *

10/2018 ▼

Manual EDBC Reason: *

Month Prior to CalSAWS ▼

Program	Status	Run Reason
<input type="checkbox"/> Medi-Cal	Active	<input type="text"/>
<input type="checkbox"/> Homeless - Temp	Pending	
<input checked="" type="checkbox"/> CalFresh	Active	

Create Manual EDBC

Cancel

This Type 1 page took 0.13 seconds to load.

7. Click the **<Program>** hyperlink for the pre conversion month ran, it will show a Run Status of Not Accepted.

Person Search

► Non Financial

► Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Cal-Learn

Service Arrangements

09/2018

11/2018

View

Search Results Summary

Results 1 - 7 of 7

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
02/2018	09/2018	Medi-Cal	Regular	Accepted - Saved	Details	01/03/2018	Conversion
04/2018	09/2018	CalFresh	Regular	Accepted - Saved	192.00	03/12/2018	Conversion
07/2018		CalWORKs	Regular	Accepted - Saved	Fail	09/06/2018	Conversion
10/2018	03/2019	CalFresh	Regular	Accepted - Saved	192.00	09/10/2018	Conversion
10/2018		CalFresh	Regular	Not Accepted	0.00	11/15/2022	Manual
10/2018	01/2019	Medi-Cal	Regular	Accepted - Saved	Details	09/10/2018	Conversion
11/2018		Homeless - Temp	Regular	Accepted - Saved	Fail	10/10/2018	Conversion

Program Configuration

1. Click the **Set Program Configuration** button.



Override Reason: Month Prior to CalSAWS

System Determination

EDBC Source: Manual

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
[REDACTED]	09/13/2010	MEM		Discontinued	
[REDACTED]	03/24/1999	MEM		Discontinued	
[REDACTED]	02/08/1992	MEM		Discontinued	
[REDACTED]	01/02/1997	MEM		Discontinued	
[REDACTED]	06/16/1974	MEM		Active	
[REDACTED]	06/12/1992	MEM		Discontinued	
[REDACTED]	08/18/1990	MEM		Discontinued	
[REDACTED]	10/05/2011	MEM		Discontinued	
[REDACTED]	10/16/1995	MEM		Discontinued	
[REDACTED]	04/10/1977	MEM		Denied	

[Set Program Configuration](#)

2. Select an Aid Code, Program Type, Reporting Type, and Meets ESAP Criteria. Then you will Edit each person on the program.

User System Configuration

Categorically Eligible:
Meets ESAP Criteria: Yes
Public Assistance Indicator:
SUAS Eligible:
Aid Code: 09 - CalFresh
Program Type: * Regular
Program Status:
Program Status Reason:
Reporting Type: Semi-Annual Reporting
Reporting Type Reason:

Program Configuration

Note: System determined rows are in bold after user edit.

Name	Role	Role Reason	Status	Status Reason
[REDACTED]	MEM		Active	



3. On the **Program Configuration** page section, click the **Edit** button for each person to navigate to the **Program Configuration Detail** page.
4. On the **Program Configuration Detail** page, update the **Claiming Code**, if applicable, and ensure the **Role Reason** and **Status Reason** are correct and update as needed. Then click the **Save and Return** button.

Program Configuration Detail

*- Indicates required fields

Save and Return Cancel

System Determination				
Name:	Role:	Role Reason:	Status:	Status Reason:
48F	MEM		Active	

User Override	
Name:	MEZIANI, HUI 48F
Role: *	Role Reason:
MEM	
Status: *	Status Reason:
Active	
Claiming Code:	Adult Child Code:
Federal	Adult

Save and Return Cancel

5. On the **Program Configuration List** page, click the **Save and Return** button.

Aid Payment

1. Enter the Unit Size, click the **Get Allotment** button.
2. Enter the **Potential Allotment** that was determined in Simulation and the **Previous Potential Allotment**.
3. Click the **Calculate** button.



Aid Payment	
Unit Size:	<input type="text" value="1"/>
Maximum Allotment:	192.00
	Get Allotment
CFAP:	\$ <input type="text" value="0.00"/>
Potential Allotment:	\$ <input type="text" value="125.00"/>
Previous Potential Allotment:	\$ <input type="text" value="192.00"/>
Overissuance Adjustment Amount	\$ <input type="text" value="0.00"/>
Authorized Amount	\$ <input type="text" value="0.00"/>
Overissuance	\$ <input type="text" value="0.00"/>
	Calculate
Pay Code:	<input type="text"/>
Delivery Method: *	Immediacy Indicator: *
<input type="text" value="Mail"/>	<input type="text" value="Routine"/>
Issuance Method: EBT	
Accept Cancel	

4. The results will display an Authorized Amount to issue a supplement or an Overpayment (CW) or Overissuance (CF) amount to establish an overpayment or overissuance.

Aid Payment	
Unit Size:	<input type="text" value="1"/>
Maximum Allotment:	192.00
	Get Allotment
CFAP:	\$ <input type="text" value="0.00"/>
Potential Allotment:	\$ <input type="text" value="125.00"/>
Previous Potential Allotment:	\$ <input type="text" value="192.00"/>
Overissuance Adjustment Amount	\$ <input type="text" value="0.00"/>
Authorized Amount	\$ <input type="text" value="0.00"/>
Overissuance	\$ <input type="text" value="67.00"/>
	Calculate
Pay Code:	<input type="text"/>
Delivery Method: *	Immediacy Indicator: *
<input type="text" value="Mail"/>	<input type="text" value="Routine"/>
Issuance Method: EBT	
Accept Cancel	

5. Click the **Accept** button.

Note: If an Overpayment (CW) or Overissuance (CF) is established, then the Select Recover Account page displays in order to select or establish an OP/OI account.

6. Click the **Save and Continue** button.



EDBC List

Display by:

Program: Type Reason: Run Status: From: To:

Search Results Summary							Results 1 - 7 of 7
Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
02/2018	09/2018	Medi-Cal	Regular	Accepted - Saved	Details	01/03/2018	Conversion
04/2018	09/2018	CalFresh	Regular	Accepted - Saved	192.00	03/12/2018	Conversion
07/2018		CalWORKs	Regular	Accepted - Saved	Fail	09/06/2018	Conversion
10/2018	03/2019	CalFresh	Regular	Accepted - Saved	192.00	09/10/2018	Conversion
10/2018		CalFresh	Regular	Accepted - Not Saved	175.00	11/15/2022	Manual
10/2018	01/2019	Medi-Cal	Regular	Accepted - Saved	Details	09/10/2018	Conversion
11/2018		Homeless - Temp	Regular	Accepted - Saved	Fail	10/10/2018	Conversion

Do you want to copy the EDBC(s) *

7. Manual EDBC on the Month Prior to Conversion is complete. Any authorized benefits will now be issued based on the Delivery Method and Immediacy Indicator selected.

OBJ:

8. If more than one month of Manual EDBC is needed and all the previously set conditions will remain the same you may select the Yes drop down in the "Do you want to copy the EDBC(s) results, and the system will use all previously set Manual EDBC conditions.

Note: This is a CalFresh example in running Manual EDBC. CalWORKs and Medical operate very similar but will have different drop-down lists from CalFresh.

Retro Medi-Cal

Adding a Retro Medi-Cal Month

1. Place cursor over **Eligibility** on the **Global** navigation bar and select **Case Summary** from the **Local** navigator.
2. Click the **View Details** button on the Medi-Cal program block.
3. Click the **Edit** button on the **Medi-Cal Detail** page.
4. Click the **Edit** button for the person requesting Retro Medi-Cal in the **Program Persons** page section.
5. Enter the appropriate **Month** on the **Month** field in the **Retro Months** page section.
6. Select the appropriate **Requested Medi-Cal Type** from the **Requested Medi-Cal Type** drop list.

Note: If requesting for more than 1 month, click the **Add** button and repeat steps 5 and 6.



7. Once all months have been selected, click the **Save and Return** button.

Note: If requesting Retro MC for more than one person, repeat steps 4, 5, and 6.

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools														
<h3>Medi-Cal Person Detail</h3> <div> *- Indicates required fields Remove Save and Return Cancel </div> <div> <h4>Recipient Information</h4> <p>Name: * [Redacted]</p> </div> <div> <h4>Application Detail</h4> <table> <tr> <td>Application Date *</td> <td>Beginning Date Of Aid: *</td> </tr> <tr> <td>11/03/2022</td> <td>11/01/2022</td> </tr> </table> Edit </div> <div> <p>CMSP Application: *</p> <p>No ▾</p> </div> <div> <h4>Requested Medi-Cal Type</h4> <table> <thead> <tr> <th>Type</th> <th>Begin Month</th> <th>End Month</th> </tr> </thead> <tbody> <tr> <td>Medi-Cal</td> <td>11/2022</td> <td></td> </tr> </tbody> </table> <div> Edit Add </div> </div> <div> <h4>Retro Months</h4> <table> <thead> <tr> <th>Month</th> <th>Requested Medi-Cal Type</th> </tr> </thead> <tbody> <tr> <td>10/2022 </td> <td>Medi-Cal ▾</td> </tr> </tbody> </table> Add </div> <div> Remove Save and Return Cancel </div>										Application Date *	Beginning Date Of Aid: *	11/03/2022	11/01/2022	Type	Begin Month	End Month	Medi-Cal	11/2022		Month	Requested Medi-Cal Type	10/2022	Medi-Cal ▾
Application Date *	Beginning Date Of Aid: *																						
11/03/2022	11/01/2022																						
Type	Begin Month	End Month																					
Medi-Cal	11/2022																						
Month	Requested Medi-Cal Type																						
10/2022	Medi-Cal ▾																						

8. Complete the data collection pages.

9. If applicable, MAGI Eligibility can now be requested for the Retro Month(s). If MAGI is not required, skip down to step 15, and Run EDBC.

10. Place cursor over **Eligibility** on the **Global** navigation bar, select **Customer Information** from the **Local** navigator., and select

11. Click the **MAGI Eligibility** link on the **Task** navigation bar.

12. Select the **Begin Month** and **End Month**.

13. Click the **Request MAGI** button.

Note: There are no restrictions to running a MAGI determination in CalHEERS.

14. Wait for the determination to come back from CalHEERS.



15. Once the determination from CalHEERS is received **Run EDBC** for the requested Retro Month as an online EDBC.

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

Run EDBC

*- Indicates required fields

Change Reason
Run EDBC
Cancel

Benefit Processing Range:

Begin Month: * **End Month: ***

10/2022 02/2023

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

Change Reason
Run EDBC
Cancel

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CMSP

Adding a CMSP program

1. Place cursor over **Eligibility** on the **Global** navigation bar, select **Case Summary** from the **Local** navigator.
2. Click the **View Details** button on the Medi-Cal program block.
3. Click the **Edit** button on the **Medi-Cal Detail** page.
4. Click the **Edit** button for the appropriate person in the **Program Persons** page section.
5. Select or confirm **Yes** is selected from the **CMSP Application** drop list.
6. Click the **Save and Return** button.

Note: Repeat steps 4, 5 and 6 for any additional program persons.

On the **Medi-Cal Detail** page, click the **Save and Return** button.

Once ready to run EDBC, see use the following steps for granting CMSP for months prior to conversion:

1. Access Manual EDBC page as seen below and click the **Create Manual EDBC** button.



Customer Information
 Case Number: **Go**
 Person Search
 ▶ Non Financial
 ▶ Financial
 Verifications
 MC 355
 EBT Account List
 MAGI Verifications
 MAGI Eligibility
 Run EDBC
Manual EDBC

Create Manual EDBC

*- Indicates required fields

Benefit Month: * 01/2023 **Manual EDBC Reason:** * Month Prior to CalSAWS

Program	Status	Run Reason
<input checked="" type="checkbox"/> Medi-Cal	Pending	<input type="text"/>

Create Manual EDBC

This Type_1 page took 1.82 seconds to load.

- Next, you'll need to update the person and program configuration.
- Start by clicking the **Set Program Configuration** button to navigate to the **Program Configuration List** page.
- On the **User Configuration** page section select a **Program Status** and a **Reporting Type** and **Program Status Reason** if applicable.
- Click the **Edit** button for the person the **Program Configuration** page section.
- On the **Program Configuration Detail** page, update the **User Override** page section as appropriate.
- Click the **Save and Return** button.
- On the **Program Configuration List** page, click the **Save and Return** button

	07/07/1987	MEM	Active
	07/07/1987	MEM	Pending

Set Program Configuration

▶ **Reporting Configuration**

Medi-Cal Summary

Eligible Budgets for MEDS

Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason
CMSP Income	Pass	\$0	0.00		88		MEM	

Failed Budgets

Test	Result	SOC	% Oblig	Aid Code	Members Tested	Role	Role Reason
No Data Found							

Set Medi-Cal Summary

- On the Medi-Cal EDBC Summary (Manual) page, click the **Set Medi-Cal Summary** button.
- On the **Medi-Cal EDBC List (Manual)** page, click the **Add** button.



11. On the **Medi-Cal EDBC Detail (Manual)** page, select the appropriate values for the CSMP determination and then click the **Save and Return** button.

Medi-Cal EDBC Detail (Manual)

* - Indicates required fields

Save and Return Cancel

Test

Test: * Test Result: * SOC: * % Oblig:

CMSP Income Pass 0 0.00

Person * Role * Role Reason Aid Code * CDM * CED

No Data Found

[Redacted] MEM 88 - CMSP - ... 01/2023 [Calendar Icon] [Calendar Icon] Add

Save and Return Cancel

12. On the **Medi-Cal EDBC List (Manual)** page, click the **Save and Return** button.
13. Once EDBC is accepted and saved, you can confirm the CMSP eligibility by accessing the CMSP detail in the Medi-Cal Person Detail page.
14. Go to the Case Summary page and scroll down to the Medi-Cal program block. Click the **View Details** button. On the **Medi-Cal Detail** page, click the hyperlink for the appropriate program person to access the **Medi-Cal Person Detail** page.

Recipient Information

Name: *

[Redacted]

Application Detail

Application Date * Beginning Date Of Aid: *

01/01/2023 01/01/2023

Edit

CMSP Application: *

Yes

CMSP Application

Application Status: * Active