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For a converted **Discontinued Program** that is rescinded.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:
 - o 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.
 - o Wave 1 November 2022
 - o Wave 2 March 2023
 - o Wave 3 May 2023
 - o Wave 4 July 2023
 - o Wave 5 September 2023
 - o 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

- 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.

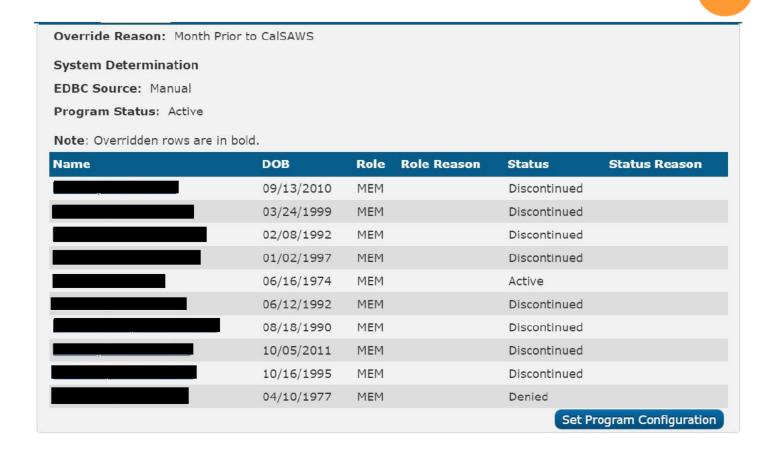


7. Click the **<Program>** hyperlink for the pre conversion month ran, it will show a Run Status of Not Accepted.

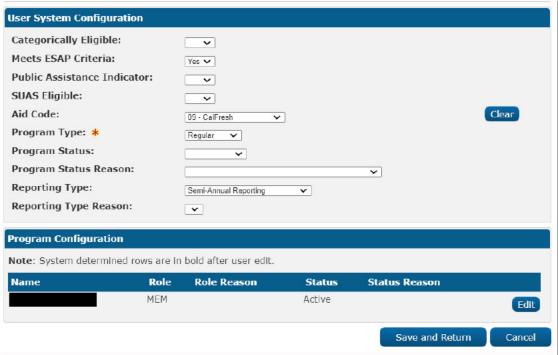


Program Configuration

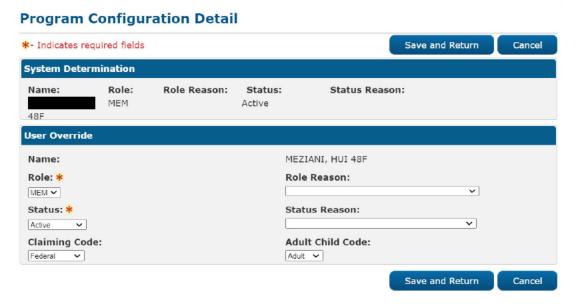
1. Click the **Set Program Configuration** button.



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



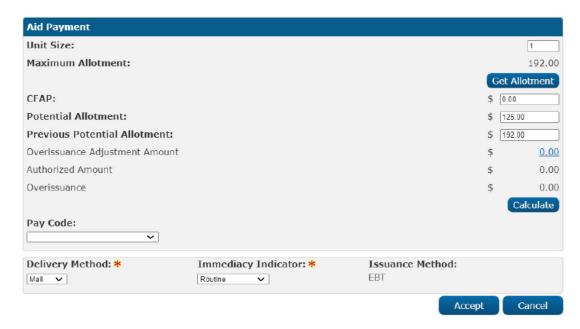
- 3. On the **Program Configuration** page section, click the **Edit** button for each person to navigate to the **Program Configuration Detail** page.
- 4. On the Program Configuration Detail page, update the Claiming Code, if applicable, and ensure the Role Reason and Status Reason are correct and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



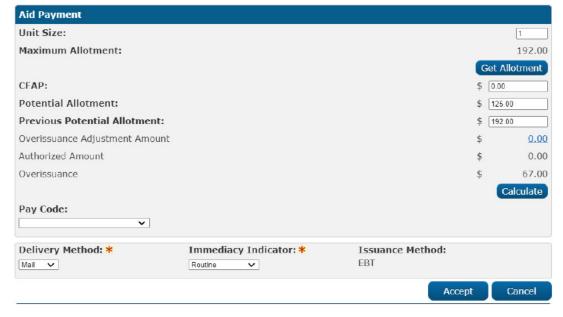
5. On the **Program Configuration List** page, click the **Save and Return** button.

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.



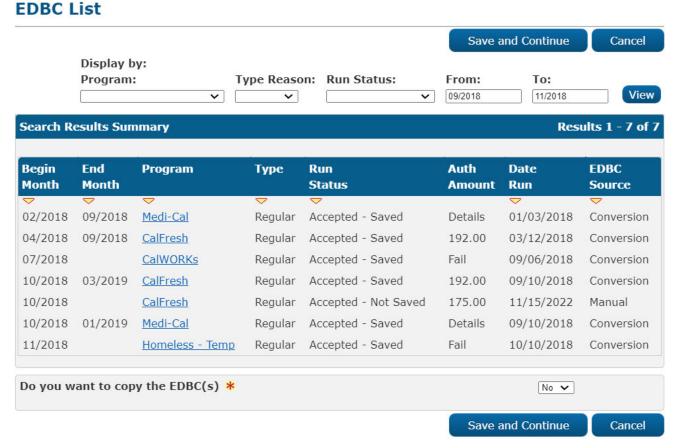
4. The results will display an Authorized Amount to issue a supplement or an Overpayment (CW) or Overissuance (CF) amount to establish an overpayment or overissuance.



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.



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

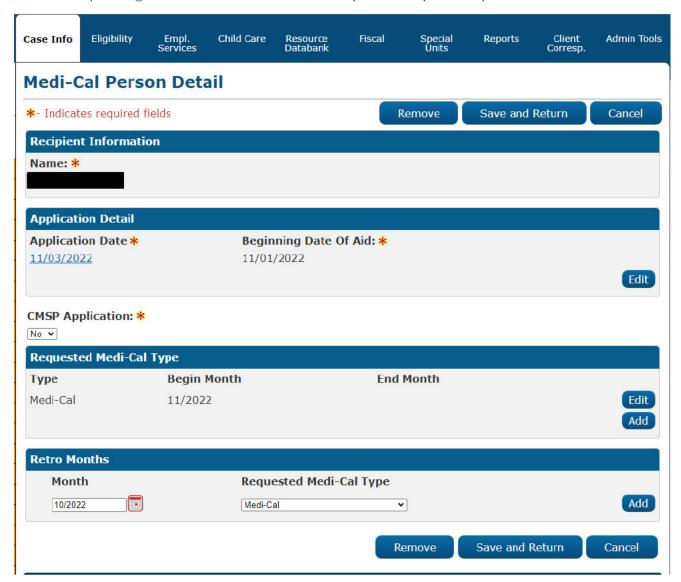
Adding a Retro Medi-Cal Month

- 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.
- 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.

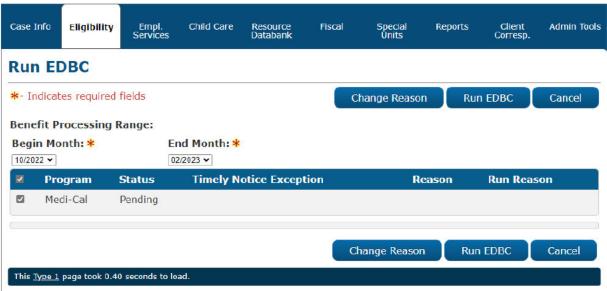


- 8. Complete the data collection pages.
- 9. If applicable, MAGI Eligibility can now be requested for the Retro Month(s). If MAGI is not required, skip down to step 15, and Run EDBC.
- 10. Place cursor over **Eligibility** on the **Global** navigation bar, select **Customer Information** from the **Local** 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.



CMSP

Adding a CMSP program

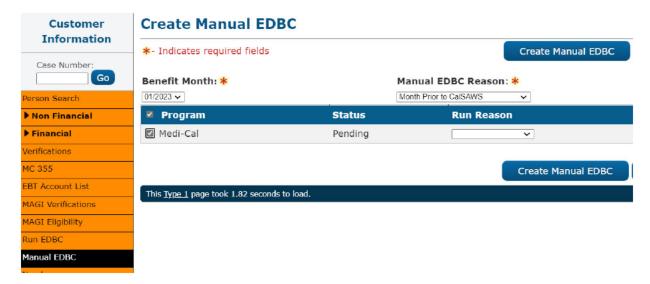
- Place cursor over Eligibility on the Global navigation bar, select Case Summary from the Local navigator.
- 2. Click the **View Details** button on the Medi-Cal program block.
- 3. Click the **Edit** button on the **Medi-Cal Detail** page.
- 4. Click the **Edit** button for the appropriate person in 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.

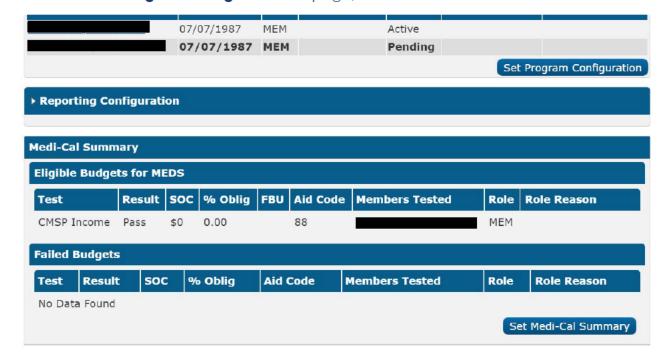
On the Medi-Cal Detail page, click the Save and Return button.

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.



- 2. Next, you'll need to update the person and program configuration.
- 3. Start by clicking the **Set Program Configuration** button to navigate to the **Program Configuration List** page.
- 4. On the **User Configuration** page section select a **Program Status** and a **Reporting Type** and **Program Status Reason** if applicable.
- 5. 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.
- 7. Click the **Save and Return** button.
- 8. On the **Program Configuration List** page, click the **Save and Return** button



- 9. On the Medi-Cal EDBC Summary (Manual) page, click the **Set Medi-Cal Summary** button.
- 10. 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.



- 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.

