

☐ CalSAWS M&E ☒ CalWIN Migration

Distribution Date:	March 2, 2023
To:	PPOC.Orange; PPOC.SantaBarbara;PPOC.Ventura; Consortium.RegionalManagers.R5; Implementation.TOSS; Consortium.SectionDirectors
CIT Name:	Wave 3: Yellow Banner Case Review Process
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

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| <input checked="" type="checkbox"/> General
<input type="checkbox"/> Policy
<input type="checkbox"/> CW
<input type="checkbox"/> CF
<input type="checkbox"/> MC
<input type="checkbox"/> CMSP
<input type="checkbox"/> FC/KG/AAP
<input type="checkbox"/> Child Care
<input type="checkbox"/> WtW
<input type="checkbox"/> Other Program(s) _____
<input type="checkbox"/> BenefitsCal <input type="checkbox"/> MyBCW
<input type="checkbox"/> Customer Correspondence
<input type="checkbox"/> Other _____ | <input type="checkbox"/> Reports
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Caseload Movement
<input type="checkbox"/> Management
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Security
<input type="checkbox"/> Batch and Interfaces
<input type="checkbox"/> Imaging
<input checked="" type="checkbox"/> Migration
<input checked="" type="checkbox"/> Conversion
<input type="checkbox"/> Technical
<input type="checkbox"/> Training
<input type="checkbox"/> Help Desk |
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Description: (Including any step-by-step instructions)	<p>Purpose</p> <p>The purpose of this CIT is to provide the Wave 3 CalWIN counties (Orange, Santa Barbara, and Ventura) instructions on how to identify, prioritize, and review Yellow Banner Cases.</p> <p>Background</p> <p>During the conversion cutover from CalWIN to CalSAWS, CalSAWS will run Batch EDBC 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 EDBC's do not match, the case will be flagged with a yellow banner and the Batch EDBC is not saved.</p> <p>These flagged cases will require further case review by a Case Worker to determine the difference in the EDBC results and make appropriate case updates to resolve the issue.</p> <p>Post Go-Live, CalSAWS Users, from converting CalWIN Counties, may see a yellow case banner on some of their active cases due to an EDBC Mismatch.</p>
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Additional Information

The CalSAWS team created guides for each of the EDBC Mismatch reasons listed in the chart below. The guides will further help the CalWIN counties navigate through CalSAWS to clear yellow banners post Go-Live.

Each Mismatch Reason is assigned a priority of 1, 2, or 3. Cases labeled with a priority of 1 being the highest priority.

The Yellow Banner cases should be cleared based on priority with the highest priority being cases that resulted in discontinuance or failure, recoupment mismatch and person status mismatch.

Mismatch Reason	Description	Priority
Program Discontinued	When EDBC is run in CalSAWS, active Programs in the CalWIN System are resulting in a Program Discontinuance in CalSAWS.	1
Recoupment Mismatch	When EDBC is run in CalSAWS, the Recoupment amount in CalSAWS differs from what was determined in the CalWIN System.	1
Program Person Status Mismatch	When EDBC is run in CalSAWS, the Program Person Status does not match what was determined in the CalWIN System.	1
Cash Program not Authorized	When EDBC is run in CalSAWS, the Cash Program fails due to a mismatch; therefore, the associated CalFresh (CF) Program also fails.	1
Program Person Role Mismatch	When EDBC is run in CalSAWS, the Program Person Roles are mismatched (such as MEM, UP, FRE, or FRI) between converted CalWIN EDBC and CalSAWS run EDBC.	2
Benefit Amount Mismatch	When EDBC is run in CalSAWS, the Benefit Amount does not match with what previously determined in the CalWIN System.	3
Aid-Code Mismatch	When EDBC is run in CalSAWS, the Aid Code does not match with what was determined in the CalWIN System.	3

	Prior Or Current EDBC Not Found	EDBC run in CalSAWS is unsuccessful due to no Prior or Current EDBC result to compare against in the CalWIN System.	3
	MAGI Determination Pending	Based off the last CalWIN MAGI eligibility determination on the DER, the EDBC run in CalSAWS results in MAGI Determination Pending for an individual(s).	3
	Full Case Review	EDBC run in CalSAWS is resulting in an uncategorized mismatch reason.	3
<p>NOTE: All Foster Care, Kin-GAP, and AAP related items may be found under the Appendix: Required Actions for Foster Care, Kin-Gap, and Adoption Assistance Program</p> <p>County Action Prior to Go-Live, Wave 3 Counties will attend a Yellow Banner Process Overview, which will take place during the March Wave 3 IPOC/TOSS meeting on 03/15/2023 from 10:00 – 11:30 am. The meeting will be recorded, and the recording link will be sent to Wave 3 counties.</p> <p>After Go-Live, a list will be provided to counties identifying cases with an EDBC Mismatch that will need to be reviewed and authorized to clear the yellow banner from the Case Summary page. This will allow upcoming automated actions, batch processes, and COLA runs to apply to cases on schedule.</p> <p>The Yellow Banner scenarios are designed to be shared in multiple ways such as: printed and posted in the office, posted on internal county sites (SharePoint, etc.), or displayed during meetings/presentations. IPOCs/PPOCs should distribute the CIT and guides to county staff.</p> <p>If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.</p> <p>The Yellow Banner Guides can be found in the Web Portal:</p> <div style="background-color: black; height: 40px; width: 100%;"></div>			
Primary Project Contact:	Raul Gonzalez gonzalezr@calsaws.org		
Backup Project Contact:	Michael Gates gatesmz@calsaws.org		
Attachments:	CIT 0074-23 Wave 3 Yellow Banner Case Review Guide and Scenarios <ul style="list-style-type: none"> • Yellow Banner Case Review Mismatch Scenario Overview • Yellow Banner – Aid Code Mismatch • Yellow Banner – Program Discontinued 		

	<ul style="list-style-type: none"> • Yellow Banner – Recoupment Mismatch • Yellow Banner – Benefit Amount Mismatch • Yellow Banner – Cash Program Not Authorized • Yellow Banner – MAGI Determination Pending • Yellow Banner – Prior or Current EDBC Not Found • Yellow Banner – Program Person Role Mismatch • Yellow Banner – Program Person Status Mismatch • Yellow Banner – Full Case Review – Medi-Cal Only • Yellow Banner – Full Case Review – CW/CF • Yellow Banner – Appendix - Required Actions for Foster Care, Kin-Gap, and Adoption Assistance Program
Web Portal Link:	<p>██████████</p> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2023" folder. 4. Click on the appropriate CIT # folder.