

Aid-Code Mismatch

Priority Level: 3

Programs Impacted: CalFresh, CalWORKs, Foster Care, Medi-Cal

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.

To clear the Yellow Banner, review the Aid-Code mismatch between the last saved and converted CalWIN EDBC. Based on the differences, Users will need to **confirm the results, and/or update the data collection records, as applicable**. The user will be required to take action based on county policy rules and **authorize the EDBC results**.

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

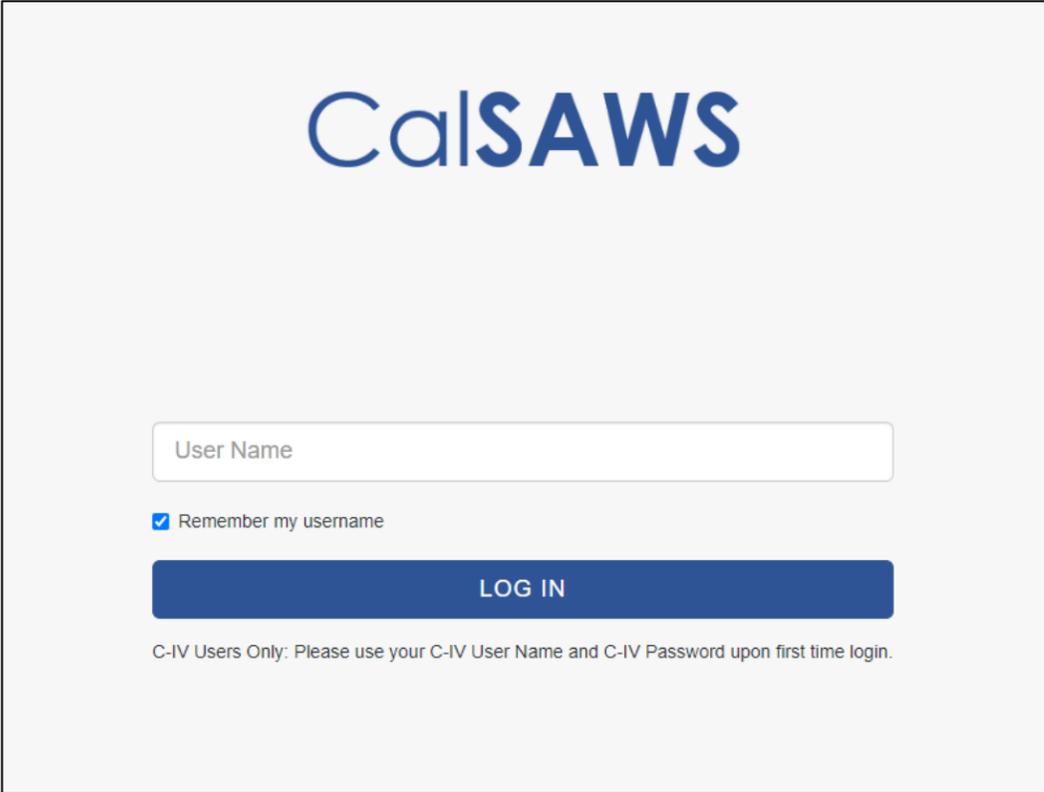
COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY	SSA INCOME	SSI SSP OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalFresh	Aid-Code Mismatch	06/30/2022		3		

Users may encounter a CalFresh program moving between Non-Assistance/Mixed Household CalFresh aid codes (for example, “09”) and a Public-Assistance CalFresh aid code (30, 32, 33, 3R, 91, 92, etc.). Users may also see a change in CalFresh aid codes in households moving to or from a Work Incentive Nutritional Supplement (WINS) program benefit (R4, R5, R6, R7, R8, R9). For Medi-Cal, any change in Aid-Code for an individual will flag the program/case with a Yellow Banner EDBC Mismatch.

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

Aid-Code 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

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

Screenshot

The screenshot shows the CalSAWS interface with the 'Eligibility' tab selected. A yellow banner with a red border is displayed, containing the 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: CalFresh." A red arrow points from the 'Add' button in the 'Companion Cases' section down to the banner. Below the banner, the 'CalFresh' section is visible, showing details for a worker with an aid code of 'R4-WINS Non-Two-Parent'.

Case Name	County						
<p>▼ Companion Cases</p> <table border="1"> <thead> <tr> <th>Case Number</th> <th>Case Name</th> <th>Add</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Case Number	Case Name	Add			
Case Number	Case Name	Add					

Display: 09/01/2022 View

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: CalFresh.

▼ Child Care

▼ CalWORKs

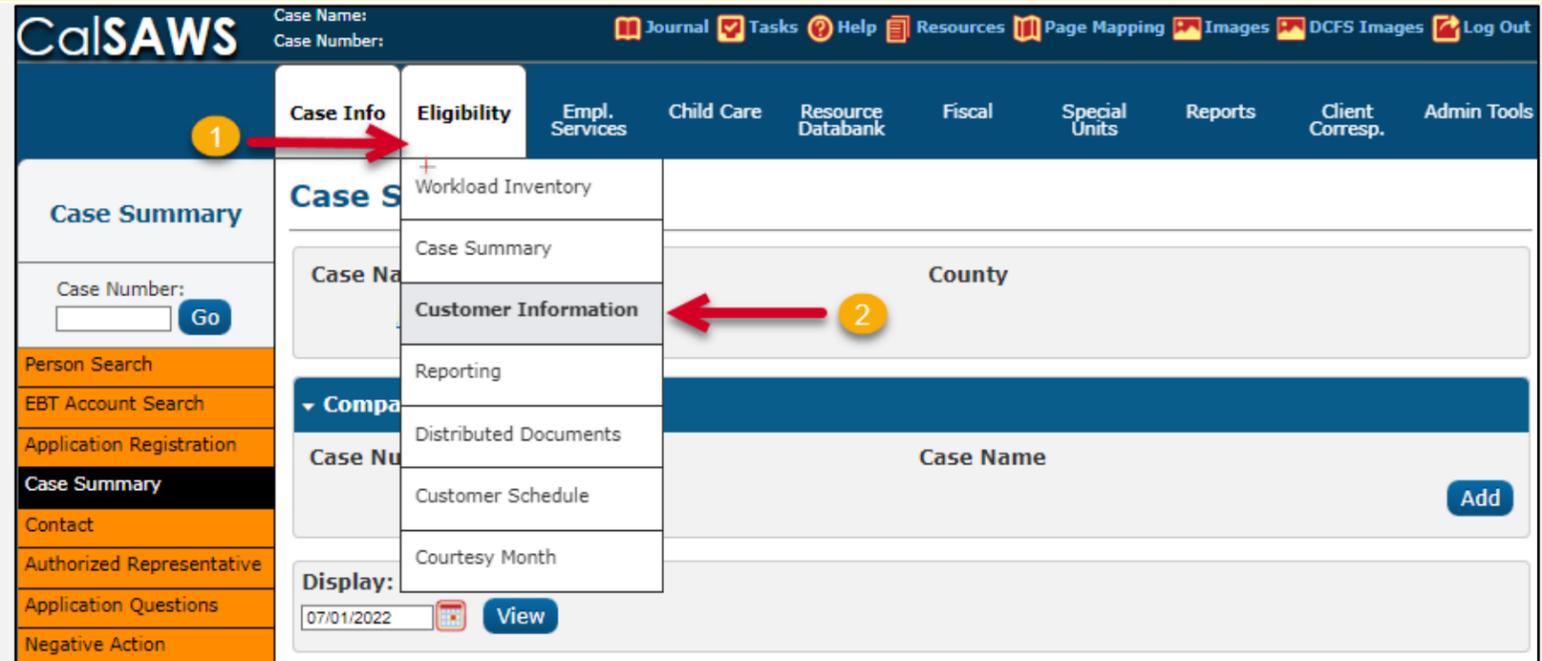
▼ CalFresh

Worker:		Primary Applicant/Recipient:	
Worker ID:		Language:	English
Program Status:	Active	Phone Number:	
RE Due Month:	11/2022 Re-Evaluate	Email:	
Reporting Type:	Semi-Annual Reporting	Payee:	
SAR Due Month:	05/2022	Application Date:	05/01/2019
Aid Code:	R4-WINS Non-Two-Parent		
Meets ESAP Criteria:			

Steps To Clear Alert

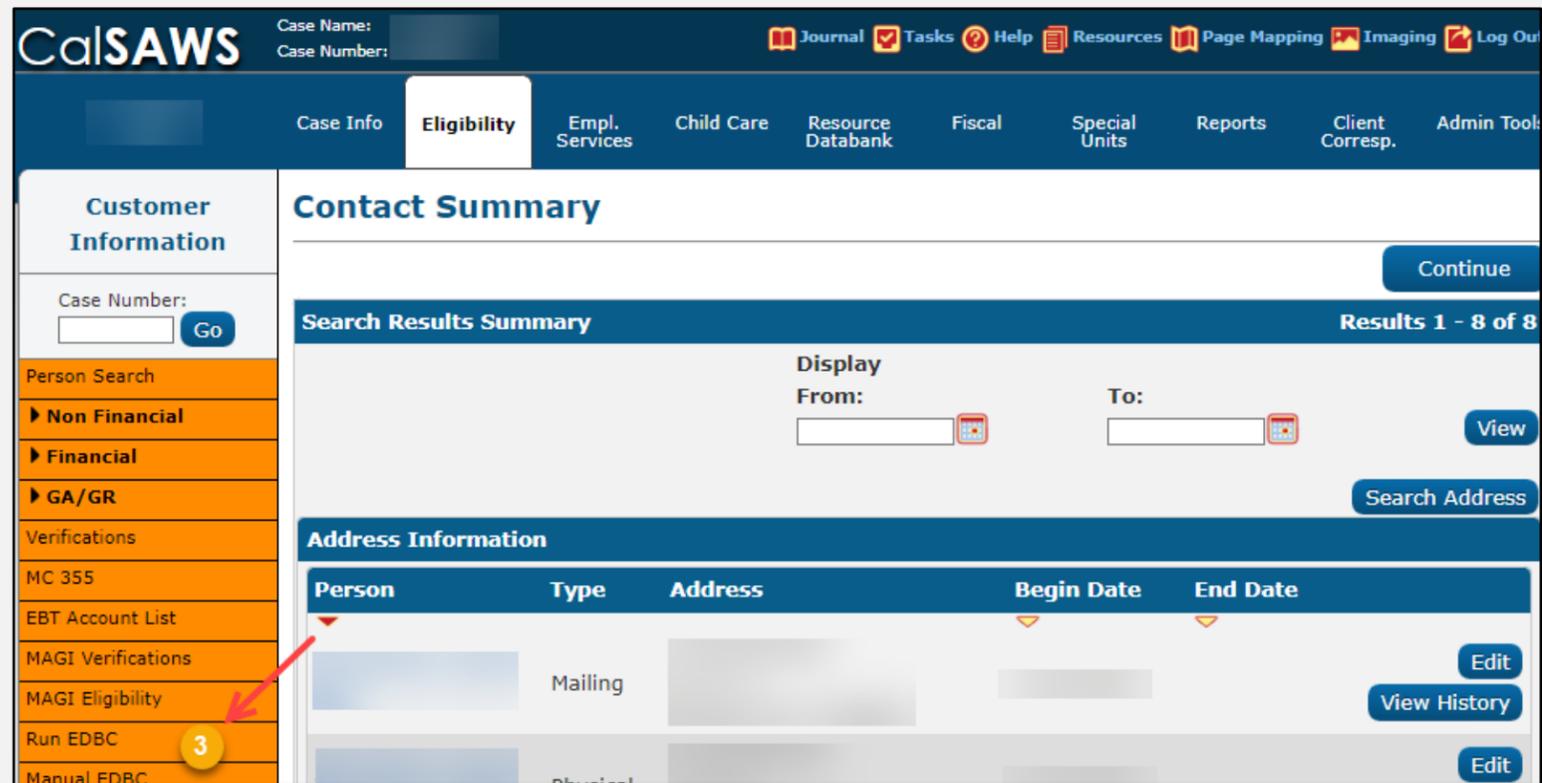
- 3 On the Case Summary Page:
1. Click on the **Eligibility** tab on the Global Navigator
 2. Click on the **Customer Information** link on the Local Navigator

Screenshot



From the Contact Summary page:

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



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

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**

Run EDBC

*- Indicates required fields

Benefit Processing Range:

Begin Month: * 09/2022 End Month: * 09/2022

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

Change Reason Run EDBC Cancel

Change Reason Run EDBC Cancel

This page took 0.68 seconds to load.

Steps To Clear Alert

When running EDBC, there are two types of validations; Hard and Soft 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 business processes and procedures.



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 business processes and procedures.

Screenshot

Steps To Clear Alert

5 Compare the Aid-Code mismatch details with the last CalWIN **Conversion** EDBC run.

Staff will need to identify if there are any mismatches in the following Data Collection Pages: income, household size, living expenses, Other Program Assistance (OPA), Non-compliance/Sanctions/Penalties, etc.

Review for any discrepancies within data collection pages that could potentially change the last authorized Benefit Issuance Amount.

In this example, we will review the converted CalFresh Budget by first clicking the **CalFresh link for 02/2022 (circled in yellow)**. Compare the converted CalFresh aid code against the new CalSAWS Budget by clicking the **CalFresh link for 9/2022 (red arrow)**.

Clicking on the CalFresh hyperlink in the Program column will navigate Users to the CalFresh EDBC Summary 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:

Person Search

► Non Financial

► Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

EDBC List

Display by:

Program: Type Reason: Run Status: From: 08/2022 To: 09/2022

Search Results Summary Results 1 - 5 of 5

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
07/2019		CalWORKs	Regular	Accepted - Saved	Fail	06/12/2019	Conversion
02/2022		CalFresh	Regular	Accepted - Saved	319.00	12/27/2021	Conversion
05/2022		Medi-Cal	Regular	Accepted - Saved	Details	04/14/2022	Batch EDBC Rules
09/2022		CalFresh	Regular	Not Accepted	319.00	07/29/2022	Online EDBC Rules
09/2022		Medi-Cal	Regular	Not Accepted	Details	07/29/2022	Online EDBC Rules

Steps To Clear Alert

6

In the example to the right, the converted 2/2022 CalFresh EDBC Summary page displays the CalFresh budget aid code of **R4-WINS Non-Two-Parent**. The new CalSAWS budget on the CalFresh EDBC Summary page for 9/2022 shows a different aid code of **09 – CalFresh**.

In the 2/2022 Work Registration block, the CalFresh household members do not show a Work Registration status. Alternatively, the new CalSAWS 9/2022 budget shows an **Exempt** Work Registration status.

★ **Note:** If the status in the Work Registration block does not match, Users should review the **Work Registration List** page.

On the CalFresh EDBC Summary page:

1. Click on the Income tab located on the Task Navigator. This will navigate Users to the Income List page.

Screenshot

CalFresh EDBC Summary

Indicates required fields

Begin Month	End Month	Run Date	Run Status	Accepted By
02/2022		12/27/2021	Accepted - Saved	

EDBC Information

Semi-Annual Reporting Period Begin Month: 05/2022

Reporting Type Reason: Type: Regular

Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Conversion

Aid Code: R4-WINS Non-Two-Parent

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Active	
		MEM		Active	
		MEM	Denied	Out of the Home	
		MEM		Active	
		MEM	Denied	Out of the Home	

Reporting Configuration

Work Registration

Name	Status	Status Reason
No Data Found		

CalFresh EDBC Summary

Indicates required fields

Begin Month	End Month	Run Date	Run Status	Accepted By
09/2022		08/02/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin Month: 06/2022

Reporting Type Reason: Type: Regular

Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 09 - CalFresh

Program Status: Active

SUAS Eligible: Yes

Program Type: Regular

Note: Overridden rows are in bold.

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

Reporting Configuration

Work Registration

Name	Status	Status Reason
	Exempt	Weekly Earnings = Fed Minimum Wage x 30hrs
	Exempt	Child under 16
	Exempt	Child under 16

Steps To Clear Alert

- 7 On the **Income List** page, review all current income records.
 1) Click the **Edit** button for the Category of Earnings income entry.

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
- Root Questions
- Income**
- Tax Household
- Property
- Special Needs
- Expenses
- Medicare
- Third Party Liability
- Other Health Care
- Health Care Ref.
- IEVS
- Hunt v. Kizer
- Verifications

Income List

*- Indicates required fields Continue

▶ Root Questions

▶ CalHEERS Verifications

Search Results Summary Results 1 - 2 of 2

Display From: To: View

Name	Category	Type	Source	Begin Date	End Date	
<input type="checkbox"/>	Earnings	Salary, Wages	Retail	04/01/2018	1	Edit View History
<input type="checkbox"/>	Income In-Kind - Earned	Utilities - Earned	Other	05/01/2019		Edit View History

Remove Income Category: * Add

Steps To Clear Alert

On the **Income Detail** page, there are two hyperlinked Amount entries in the Income Amounts section under the Program field, one for Cash / CalFresh and the other for Medi-Cal.

- 1) Click the **Edit** button on the Cash / CalFresh income record.

Screenshot

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
- 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
- Service Arrangements
- ▶ ABAWD

Income Detail

*- Indicates required fields

Save and Return Cancel

Name: *

Category: Earnings **Type: *** Salary, Wages

Employment: Retail Remove

Frequency: * Monthly

Description: CalWIN Conversion Income Type: Earnings, wages, salaries, bonuses, commissions, military pay|| EMPLOYER BUSINESS

▶ Shared with RDP

▶ Pickle Eligibility

Income Amounts *

Display

Program: * All **From:** 09/2022 **To:** 09/2022 View

Program	Amount	Begin Date	End Date
<input type="checkbox"/> Cash / CalFresh	1,691.26	11/01/2021	1
<input type="checkbox"/> Medi-Cal	1,442.63	06/01/2021	Edit
Actuals (TMC / Pickle)	1,442.63	06/01/2021	

Remove

Steps To Clear Alert

Users should review all listed income amounts for accuracy. Users can select and/or adjust between proxy or actual work hours.

On the **Income Amount Detail** page:

1. Select **Actual** from the **Work Hours** drop list and edit the **<Number of Hours>** in the **Work Hours** field.
2. Enter the appropriate **<Date>** in the **Begin Date** field.
3. Enter the appropriate **<Date>** in the **End Date** field, if applicable.

★ **Note:** The System prorates the actual hours based on the Begin and End dates entered.

4. Select a **<Status>** from the **Verified** drop list.

5. Click the **Save and Return** button on the **Income Amount Detail** page.

★ **Note:** The System uses a value of 0 when calculating the WINS Weekly Hours if you select Actual and enter a value of 0 or no value at all in the Work Hours field.

The System does not automatically default to using the proxy calculation when no selection is made. Once Proxy is selected, the proxy calculation divides the income amount by the State minimum wage plus \$0.50 to determine the WINS Weekly Hours for the income record.

★ **Note:** The proxy calculation for the WINS weekly hours must not be used on a regular basis; it should only be used when the actual hours worked information cannot be obtained from the CalFresh household.

Additional WINS information can be found in the **CalSAWS Quick Guide – WINS** in LMS.

Screenshot

The screenshot displays the CalSAWS interface for the 'Income Amount Detail' page. At the top, there are navigation links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main navigation bar includes Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The left sidebar lists various categories such as Customer Information, Person Search, Non Financial, Financial, Root Questions, Income (highlighted), 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, Service Arrangements, ABAWD, and EDBC Results. The main content area is titled 'Income Amount Detail' and includes a 'Save and Add Another', 'Save and Return', and 'Cancel' button at the top right. Below this, there is a 'Change Reason' section with a 'New Change Reason' dropdown and a 'New Reported Date' field. The 'Average Calculator' section contains a table with columns for Amount, Date Received, Count in Average, and Work Hours. The 'Work Hours' column has a dropdown menu with 'Actual' and 'Proxy' options. The 'Reported Amount' and 'Unreported Amount' sections are at the bottom, with 'Reported Amount' set to 0 and 'Unreported Amount' set to 0.00. The 'Begin Date' and 'End Date' fields are also present, with 'Begin Date' set to 11/01/2021. The 'Verified' dropdown is set to 'Verified'. The page footer shows the last updated date and time, and a loading message: 'This page took 0.45 seconds to load.'

Steps To Clear Alert

Screenshot

8 On the **Medical Condition List** page, review all current medical condition records.

1. Click the **Edit** button for the person record whose Medical Condition Type requires review.

The screenshot shows the CalSAWS interface for the 'Medical Condition List' page. The top navigation bar includes 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar lists various sections under 'Customer Information', with 'Non Financial' expanded to show options like Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship, Citizenship, Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, Customer Options, Money Mngmt, and Time Limits. The main content area features a 'Medical Condition List' section with a 'Continue' button and a 'Root Questions' section. Below these is a 'Search Results Summary' showing 'Results 1 - 2 of 2'. A table displays the following data:

Name	Category	Medical Condition Type	Begin Date	End Date	Actions
[Redacted]	29M	Active	Other CF Disability	11/01/2011	Edit, View History
[Redacted]	64M	Active	Incapacity - Verifiable and at Least 30 Days	08/01/1998	Edit, View History

At the bottom of the table, there is a 'Remove' button and a 'Medical Condition Category' dropdown menu with an 'Add' button. A 'Complete' checkbox is also present. A red arrow points to the 'Edit' button for the second record.

Steps To Clear Alert

Users should review all listed medical condition records for accuracy. Users can select and/or adjust the Medical Condition Type using the dropdown menu.

On the **Medical Condition Detail** page:

1. Under the **Medical Condition Type** section, select the appropriate choice from the drop-down menu based on the case info and county process.
2. Review remaining mandatory fields and make any adjustments, if applicable.
3. Click the **Save and Return** button.

The following Job Aids are available to assist in CalSAWS located by clicking **Help** in the Utilities navigation bar:

- **JA Medical Condition Detail - Disabled or SP-DDSD**
- **JA Medical Condition Detail - Fry v Saenz**

Screenshot

The screenshot displays the CalSAWS interface for editing a medical condition. The top navigation bar includes 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar lists various case categories, with 'Medical Condition' currently selected. The main form area is titled 'Medical Condition Detail' and includes a 'Save and Return' button highlighted with a red arrow. The form contains several sections: 'Change Reason' with a dropdown for 'New Change Reason' (set to 'Participant Provided - Written') and a date field for 'New Reported Date' (03/01/2022); 'Name' (64M) and 'Medical Condition Category' (Active); 'Verified' (Verified) and 'Medical Condition Type' (Incapacity - Verifiable and at Least 30 Days); 'Description' and 'Does this person need care so that...'; 'Does this person need help with act... facility?'; 'Does this person work and have medical expenses that are needed to help them keep working?'; and 'Begin Date' (08/01/1998), 'End Date', and 'Expected Length of Condition' (30 days or more). A status bar at the bottom indicates the page was last updated on 04/09/2022 at 12:00:00 AM by user 07.

Steps To Clear Alert

9 A single case must be established in CalSAWS for a household who contains at least one individual who is receiving Long Term Care (LTC) and other household members are receiving MediCal.

Separating the individual receiving LTC onto their own individual case in CalSAWS will result in incorrect eligibility determinations for each household member.

Screenshot

The screenshot displays the 'Eligibility' tab in CalSAWS. The navigation bar includes tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. A sidebar on the left contains a list of menu items: New Program, New Person, Hide Person, EBT Account List, Issuance History, Auxiliary Authorization List, Expungement History, Child Support Collections, Time Limit Aid Summary, Housing Support, Home Visiting, Legacy Case, Confidentiality, ICT Summary, IAT Summary, MAGI Case Search, Customer Contact History, SB 87, Invoice History, Linkages, General Ledger, Valuable History, Point Of Service, and Case Copy List.

The main content area shows two Medi-Cal cases:

- Medi-Cal #1:** Worker ID: [Redacted], Program Status: Active, RE Due Month: 03/2023. Primary Applicant/Recipient: [Redacted]. Language: [Redacted], Phone Number: [Redacted], Email: [Redacted], Authorized Representative(s): [Redacted], Application Date: [Redacted]. A table below shows a requested Medi-Cal type of LTC with role MEM and status Active.
- Medi-Cal #2:** Worker ID: [Redacted], Program Status: Active, RE Due Month: 08/2023. Primary Applicant/Recipient: [Redacted]. Language: [Redacted], Phone Number: [Redacted], Email: [Redacted], Application Date: [Redacted]. A table below shows a requested Medi-Cal type of Medi-Cal with role MEM and status Active.

Steps To Clear Alert

On the Run EDBC page, both Medi-Cal programs must be selected to run EDBC simultaneously for the system logic to allocate income and property appropriately in the eligibility determination.

Screenshot

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

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

Run EDBC

*- Indicates required fields

Benefit Processing Range:

Begin Month: * 10/2022 **End Month: *** 10/2022

<input checked="" type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	Medi-Cal #1	Active			<input type="text"/>
<input checked="" type="checkbox"/>	Medi-Cal #2	Active			<input type="text"/>

Change Reason Run EDBC Cancel

This Type 1 page took 0.77 seconds to load.

Steps To Clear Alert

In this example, if the household's eligibility was determined in two separate CalWIN cases, both cases will be converted to CalSAWS. These cases in CalSAWS must be combined into one single case record.

The Case Summary page allows users to view companion cases associated with the case. Note that companion cases are not added to a case automatically, they must be added manually

1. Identify the case numbers for each spouse and LTC case and determine which case to establish as the master record.
2. On the case chosen to remain open, place the cursor over **Eligibility** on the Global navigation bar and select **Case Summary** from the Local navigator.
3. Click the **New Program** link on the Task navigation bar to access the Program Detail page.
4. Select the Medi-Cal program under the Select Program dropdown menu and click the **Go** button to navigate to the New/Reapplication Detail page.
5. Ensure the appropriate details are entered (e.g., Application Date, Requested Medi-Cal Type, etc.) and check the box next to the name of the appropriate spouse for the newly added program and click the **Save and Return** button.
6. Continue forward until CalSAWS navigates the user back to the **Case Summary** page.
7. Place the cursor over **Eligibility** on the Global navigation bar and select **Customer Information** from the Local navigator.
8. Review the data collection pages to ensure that the appropriate information is available for the newly added spouse and update pages, as necessary.
9. Click the **Run EDBC** link on the Task navigation bar to access the Run EDBC page.

Screenshot

The screenshot displays the CalSAWS interface. At the top, there is a navigation bar with the CalSAWS logo and user information (Case Name, Case Number). To the right are utility icons for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and 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 'Case Summary' and includes buttons for Images, Capture, and Generate Coversheet. A form section contains fields for Case Name and County (Butte). Below this is a section for 'Companion Cases' with a table header for Case Number and Case Name, and an Add button. At the bottom, there is a 'Display:' section with a date field (10/01/2022) and a View button. On the left side of the screenshot, a vertical sidebar contains a list of navigation options: Person Search, EBT Account Search, Application Registration, Case Summary (highlighted), Contact, Authorized Representative, Application Questions, Negative Action, and New Program.

Steps To Clear Alert

10. Check the box for both Medi-Cal programs and select the appropriate Run Reason from the Run Reason dropdown menu, as necessary.
11. Click the **Run EDBC** button to navigate to the **EDBC List** page.
12. Click the program hyperlink with a Run Status of Not Accepted, review the results for accuracy, and click the **Accept** button to navigate back to the **EDBC List** page.
13. Click the **Save and Return** button.

On the duplicate case, take negative action per your county's business process.

The following Job Aids are available to assist in CalSAWS located by clicking **Help** in the Utilities navigation bar:

- **JA Medi-Cal - Long Term Care (LTC)**

Screenshot

10 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.

Steps To Clear Alert



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 your county's procedure when Troubleshooting EDBC Results.

Screenshot

The screenshot shows the CalSAWS interface for the Eligibility section. The top navigation bar includes Case Name, Case Number, and various utility icons. The main menu has tabs for Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools.

Customer Information

Case Number:

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

Begin Month	End Month	Run Date	Run Status	Accepted By
09/2022		07/29/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin Month: 06/2022

Reporting Type Reason:

Type: Regular

Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 09 - CalFresh

Program Status: Active

SUAS Eligible: Yes

Program Type: Regular

Note: Overridden rows are in bold.

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

Reporting Configuration

Work Registration

Name	Status	Status Reason
	Exempt	Weekly Earnings = Fed Minimum Wage x 30hrs
	Exempt	Child under 16
	Exempt	Child under 16

Steps To Clear Alert

Additional **Quick Guides** available in LMS and **Job Aids** available in CalSAWS:

JA EDBC – Troubleshooting Incorrect Results

JA EDBC - Online Definitions and Troubleshooting

Screenshot

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Total Adjusted Income								=	1,176.01
Excess Shelter Costs								\$	<u>49.00</u>
Maximum Shelter Allowance								\$	597.00
Allowed Shelter Costs								\$	49.00
Total Net Nonexempt Income								=	1,127.00
Household Size									<u>3</u>
Maximum Net Income								\$	1,830.00
Result									Pass
Allotment									
Full Month Allotment								\$	319.00
Dates to Prorate									1-30
Allotment								\$	319.00
Combined Allotment								\$	319.00
CFAP Amount								\$	0.00
Overridden CFAP Amount								\$	
Final Allotment								\$	319.00
Overridden Allotment								\$	
								Override Allotment	
Previous Potential Benefit Allotment								-	<u>0.00</u>
Overissuance Adjustment Amount								-	<u>0.00</u>
Authorized Amount								=	319.00
Work Incentive Nutritional Supplement									
WINS Amount								\$	<u>0.00</u>
Delivery Method: *			Immediacy Indicator: *			Issuance Method:			
Mail <input type="button" value="v"/>			Routine <input type="button" value="v"/>			EBT			
						<input type="button" value="Change Reason"/> <input type="button" value="Accept"/> <input type="button" value="Cancel"/>			



Steps To Clear Alert	Screenshot

Steps To Clear Alert

- 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.

Screenshot

The screenshot shows the CalSAWS interface for the 'EDDB List' page. The top navigation bar includes 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar contains a 'Customer Information' section with a 'Case Number' field and a 'Go' button, and a list of menu items including 'Person Search', 'Non Financial', 'Financial', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC', 'Manual EDBC', 'Needs', 'Service Arrangements', 'ABAWD', and 'EDDB Results'. The main content area displays the 'EDDB List' with a message: 'CalFresh NOA run is complete - NOA generated'. Below this is a 'Display by:' section with dropdown menus for 'Program', 'Type Reason', and 'Run Status', and date pickers for 'From' (08/2022) and 'To' (09/2022). A 'Search Results Summary' section shows 'Results 1 - 5 of 5' in a table:

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDDB Source
07/2019		CalWORKS	Regular	Accepted - Saved	Fail	06/12/2019	Conversion
02/2022		CalFresh	Regular	Accepted - Saved	319.00	12/27/2021	Conversion
05/2022		Medi-Cal	Regular	Accepted - Saved	Details	04/14/2022	Batch EDBC Rules
09/2022		CalFresh	Regular	Accepted - Not Saved	319.00	07/29/2022	Online EDBC Rules
09/2022		Medi-Cal	Regular	Accepted - Not Saved	Details	07/29/2022	Online EDBC Rules

At the bottom of the table, there is a status bar that reads: 'This Type 1 page took 0.46 seconds to load.' The 'Save and Continue' button is highlighted with a red arrow.

Steps To Clear Alert

- 10 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 displays the CalSAWS 'Distributed Documents Search' interface. At the top, there is a navigation bar with the CalSAWS logo and various utility links like 'Journal', 'Tasks', 'Help', 'Resources', 'Page Mapping', 'Images', 'DCFS Images', and 'Log Out'. Below this is a secondary navigation menu with tabs for 'Case Info', 'Eligibility' (which is selected), 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. On the left side, there is a sidebar menu with options such as 'Person Search', 'Non Financial', 'Financial', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC' (highlighted in black), and 'Manual EDBC'. The main content area is titled 'Distributed Documents Search' and includes a search input field with a 'Go' button and a 'Refine Your Search' link. Below the search area is a 'Search Results Summary' section showing 'Results 1 - 1 of 1'. The results are presented in a table with columns: Date, Document Name, Number, Program, Status, and Viewed Via Self-Service Portal. A single result is shown with the date '07/29/2022 10:00 AM' and the document name 'NOA - CF - NC - WINS:Work hr.is < minimum reqd'. A red arrow points to the document name. A 'Details' button is visible next to the result. A 'Back to EDBC List page' button is located at the top right of the search results area.

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
07/29/2022 10:00 AM	NOA - CF - NC - WINS:Work hr.is < minimum reqd		CalFresh	Preview	Details

Steps To Clear Alert	Screenshot
<p>11 Once the Notice of Actions are reviewed, accepted, and saved, journal the action taken according to County business processes. If the NOA is not reviewed, it will go out due to an overnight batch process.</p> <p>Navigate back to the Case Summary page.</p>	<p>NOA</p> <p>Reject Cancel Preview Only Do not Distribute</p> <p>STATE OF CALIFORNIA HEALTH AND WELFARE AGENCY CALIFORNIA DEPARTMENT OF SOCIAL SERVICES</p> <p>NOTICE DATE: July 29, 2022 CASE NAME: [REDACTED] CASE NUMBER: [REDACTED] WORKER NAME: [REDACTED] WORKER ID: [REDACTED] TELEPHONE NUMBER: [REDACTED] CUSTOMER ID: [REDACTED]</p> <p>CALFRESH NOTICE OF TERMINATION WORK INCENTIVE NUTRITIONAL SUPPLEMENT (WINS) BENEFITS</p> <p>As of 08/31/2022, your WINS benefits is being stopped. Here's why: Your work hours have fallen below the minimum required for WINS eligibility.</p> <p>EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away.</p> <p>Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s).</p> <p>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.</p> <p>TEST USE ONLY</p> <p>DO NOT DISTRIBUTE</p> <p><small>Rules: These rules apply; you may review them at your local welfare office: ACL 13-71, ACIN I-14-14, Welfare & Institutions Code 15525.</small></p> <p>WINS 1239-T Page 1 of 1</p>

Steps To Clear Alert

- 12 Journal the action taken according to County business processes.
- The Yellow Banner should no longer appear on the case.
- The case review is complete!

Screenshot

The screenshot shows the CalSAWS Case Summary page. The top navigation bar includes 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar contains a list of menu items such as 'Person Search', 'EBT Account Search', 'Application Registration', 'Case Summary', 'Contact', 'Authorized Representative', 'Application Questions', 'Negative Action', 'New Program', 'New Person', 'Hide Person', 'EBT Account List', 'Issuance History', 'Auxiliary Authorization List', 'Expungement History', 'Child Support Collections', 'Time Limit Aid Summary', 'Housing Support', 'Home Visiting', 'Legacy Case', 'Confidentiality', 'ICT Summary', 'IAT Summary', 'MAGI Case Search', 'Customer Contact History', 'SB 87', 'Invoice History', 'Linkages', 'General Ledger', 'Valuable History', 'Point Of Service', and 'Case Copy List'. The main content area displays the 'Case Summary' for a specific case. A prominent red message states 'Yellow Banner cleared!'. Below this, there are sections for 'Child Care' and 'CalWORKs'. The 'CalFresh' section provides detailed information about the worker and applicant, including 'Worker ID', 'Program Status', 'RE Due Month', 'Reporting Type', 'SAR Due Month', 'Aid Code', 'Meets ESAP Criteria', 'Public Assistance Indicator', 'FBU', 'Primary Applicant/Recipient', 'Language', 'Phone Number', 'Email', 'Payee', and 'Application Date'. A table at the bottom lists roles and their statuses.

Name	Role	Role Reason	Status	Status Reason
	MEM		Active	
	MEM		Active	
	MEM		Active	
	MEM		Denied	
	MEM		Denied	