Appendix: Required Actions for Foster Care, Kin-Gap and Adoption Assistance Program

Priority Level: 1

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.

This guide provides detailed actions that end-users will be required to take in order to update missing fields on Foster Care, ARC, Kin-GAP and Adoption Assistance Program (AAP) pages.

If a user attempts to run EDBC before updating these missing fields, the resulting EDBC will result in either a change in benefit amount, aid code, or a program discontinuance.

These cleanup areas have been broken down into 5 areas:

Guide Number	Name	Programs Impacted	EDBC Mismatch Reason(s)
1	Update AAP Summary Detail Page	AAP	Program Discontinued, Benefit Amount Mismatch
2	Update Foster Care Child Welfare Services Authority Detail	Foster Care	Program Discontinued, Benefit Amount Mismatch, Aid-Code Mismatch
3	Missing Fields on Foster Care Resource Pages	Foster Care, Kin-GAP, AAP	Program Discontinued, Benefit Amount Mismatch
4	Update Infant Supplement Payments	Foster Care, Kin-GAP	Benefit Amount Mismatch
5	Update Education Travel Reimbursements	Foster Care	Benefit Amount Mismatch

6	Relationship Page	Foster Care, Kin-GAP	Program Discontinued, Benefit Mismatch, Aid code Mismatch
7	Non-Minor Dependent – Other Program Assistance Page	Foster Care	Program Discontinued, Benefit Amount Mismatch
8	Kin-GAP Summary Page	Kin-GAP	Program Discontinued

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 impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all the information is entered as accurately as possible to allow for a correct determination to be made.

Details	Screenshots

1

Update AAP Summary Detail Page

Multiple mandatory fields are missing on the AAP Summary Detail Page. Some of these fields are being converted as blank because the questions do not exist in CalWIN.

The following mandatory sections and fields are not complete on the AAP Summary Detail Page:

1. Complete the Top Section of the page mandatory fields. Enter the FC8 and AAP4 signed date if applicable
2. Complete the Title IV-E Federal Findings section with information that applicable to the case
3. Complete the Applicable Child section with information that is applicable to this case
4. Complete the State Findings section with information applicable to this case
5. Complete the Extended Benefit section mandatory question as it applies to the case

The sections and questions will need to be answered prior to running EDBC as they will impact the eligibility determination. Impacted cases will appear on the Yellow Banner case report.

EDBC Mismatch Reason: **Program Discontinued, Benefit Amount Mismatch**

Figure 1 – AAP Summary Detail page

Details	Screenshots
Clean-Up Instructions: 1. Place the Cursor over **Eligibility** on the Global Navigation Bar 2. Select **Customer Information** from the Local Navigator 3. Click the **AAP** link in the Task Navigation Bar 4. Click the **AAP Summary** link on the Task Navigation Bar to Access the **AAP Summary List Page** 5. Click the **Type** hyperlink to access the **AAP Summary Detail Page** (Figures 1 & 2) 6. Click **Edit** 7. Select **Yes or No** from the drop downs selection for each mandatory question (mandatory questions are marked with a red asterisk) 8. Click **Save and Return** button to confirm selection	 **Figure 2 – AAP Summary Detail page continued**

Details	Screenshots

2

Update Foster Care Child Welfare Services Authority Detail

Multiple mandatory fields are missing on the Child Welfare Services Authority Detail Page. The page sections and fields are being converted as blank because the questions do not exist in CalWIN.

Note: The Emergency Assistance EA block will only need to be completed on this page if paying EA 5K/5L funds for 6 months or up to 12 months. (Figure 3)

This page will need to be answered prior to running EDBC as they will impact the eligibility determination. Impacted cases will appear on the Yellow Banner case report

EDBC Mismatch Reason: Program Discontinued, Benefit Amount Mismatch, Aid-Code Mismatch

Figure 3 – Child Welfare Services Authority Detail Page
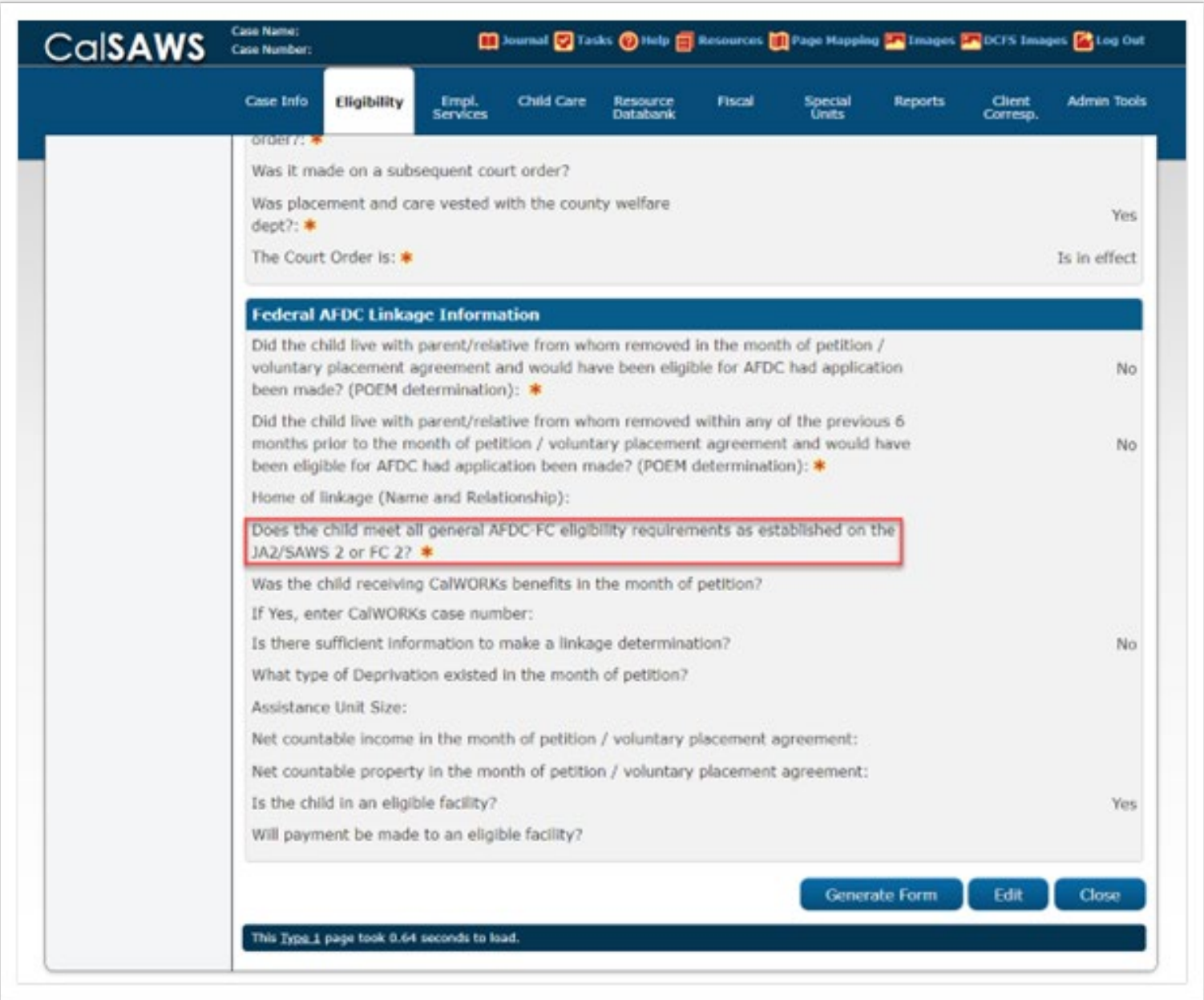
Details	Screenshots

Clean-Up Instructions:

1. Place the cursor over **Eligibility** on the Global Navigation bar
2. Select **Customer Information** from the Local Navigator
3. Click **the Foster Care** link in the Task Navigation bar
4. Click the **Placement Authority** link in the Task Navigation bar to access the Placement Authority List page.
5. Click The **Type Hyperlink** for the current Placement Authority listing to access the Child Welfare Services Authority Detail Page
6. Click the **Edit** button
7. Complete or update the top section of the page with information that is applicable to case.
8. Complete the **Emergency Assistance EA** Section if paying continued EA funds of 5k or 5L for 6 months to 12 months
9. Complete the **Court Order findings** section with information that is applicable to case
10. Complete the **Federal AFDC Linkage** Information section with applicable information of the case
11. Complete the **FC Income /Property** Page by clicking the **FC Income /Property** button if there is month of petition income for case.
12. Click the **Generate Form** button to generate the FC3A if needed.
13. Note: if the user saves the page before generating the FC3A they can generate it from the Template Repository.
14. Click the **Save And Return** button
15. If the FC3 needs to be generated click the **Generate Form** button on this page after you click the Save and Return button.

Figure 4 – Child Welfare Services Authority Detail Page Continued

Details	Screenshots

3

Missing Fields on Foster Care Resource Pages

The following mandatory fields may be missing from the Foster Care Resource Detail Page and License Detail page:

If the placement type is a Relative/ NERFM/SILP/Non-Related Legal Guardian or KG Legal Guardian, the Home approval section on the Child Placement Detail or Kin-GAP Rate detail page will need to be completed (figure 6)

Foster Care Resource Detail Page:
- Physical Address *
- Phone Information *
- Update Frequency **
- Next Review Date **

Foster Care License Detail Page:
- License Status *
- License Number*
- Begin Date *

* These items may be missing if the information was not entered in CalWIN

The mandatory fields on the Foster Care License Detail page must be updated to run and save EDBC. The program will fail if these fields are not completed.
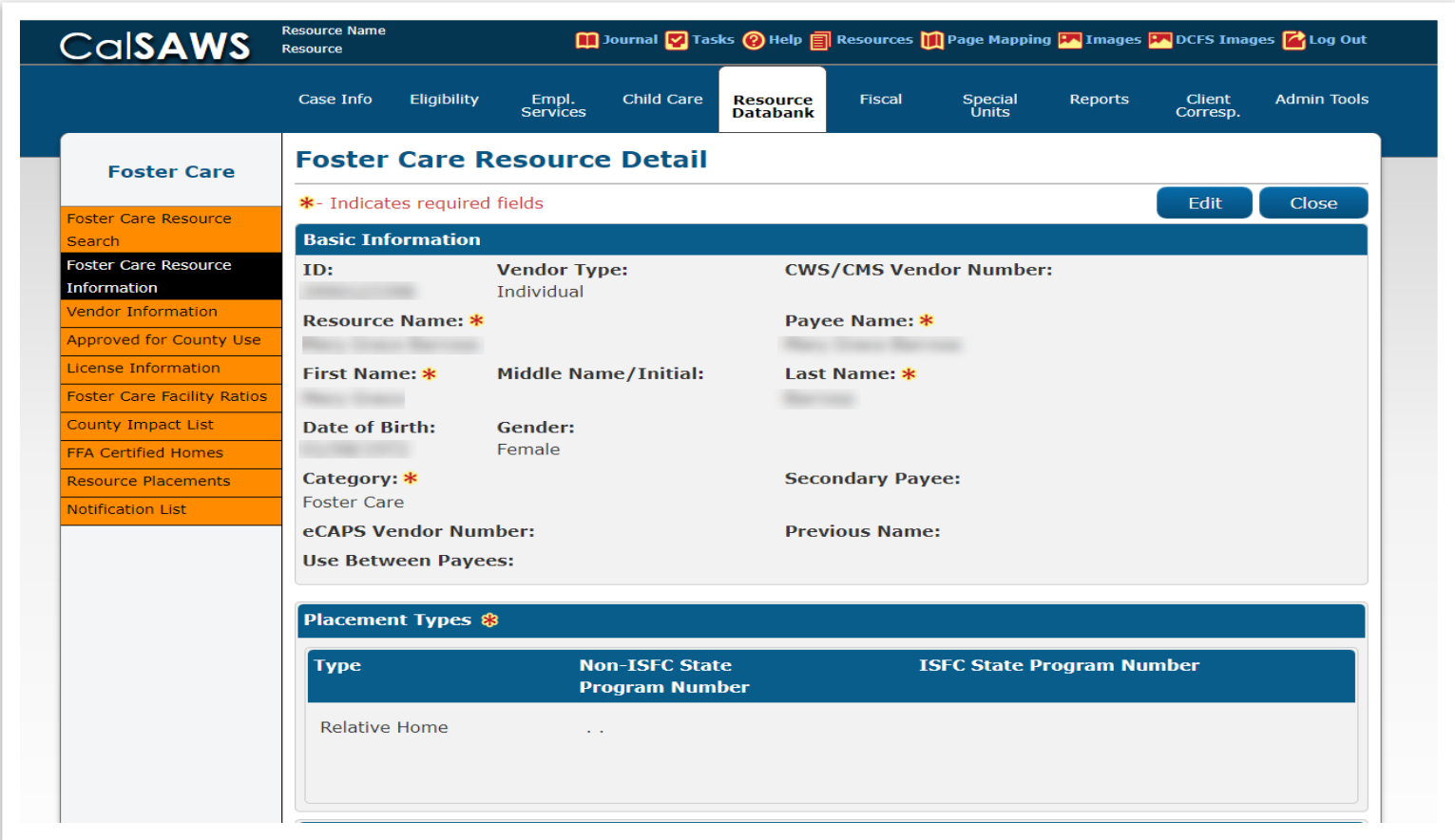
Figure 5 – Foster Care Resource Detail Page

Details	Screenshots

EDBC Mismatch Reason: Program Discontinued, Benefit Amount Mismatch

Clean-Up Instructions:

To Access a Foster Care Resource:

1. Place the Cursor over **Eligibility** on the Global Navigation Bar
2. Select **Customer Information** from the Local Navigator
3. Select the **Foster Care** link form the Task Navigation Bar
4. Click the **Child Placement** link in the Task Navigation Bar to access the **Child Placement List Page**
5. Click the **Name** hyperlink for the desired placement to access the **Child Placement Detail Page**
6. Click the **Placement Name** hyperlink (Figure 6) to access the Foster **Care Resource Detail Page** (Figure 5)
7. Click the **Close** button to navigate back to the Child Placement Detail page
8. Click the **Edit** button on the Foster Care Resource Detail page. (Figure 5)
9. If the placement type is a Relative/NERFM/SILP/Non-Related Legal Guardian, the **Home Approval** section will need to be completed on Child Placement Detail Page
10. Click the **Save and Return** button

Figure 6 – Child Placement Detail Page

Details	Screenshots
11. Review and update all mandatory fields as necessary (Physical Address, Phone Information, Update Frequency, Next Review Date) 12. Click **Save** to confirm all updates to the Foster Care Resource Detail Page 13. Click the **License Information** link in the Task Navigation Bar to access the **Foster Care License List Page** (Figure 7) 14. Click the **Add** button on the License List Page 15. Complete the mandatory fields (License Status, License Number, Begin Date) Note: Relatives, Legal Guardians, SILPS do not have a license number, field should not be mandatory for these types 16. Click the **Save and Return** button to confirm selections and be navigated back to the Foster Care Resource Detail page	

Figure 7 – Foster Care License Detail Page

Details	Screenshots

4

Update Infant Supplement Payments

CalWIN does not have an area to set up an Infant Supplement Payment. Infant supplements are automatically issued to the Kin-Gap or Foster Care case when an infant is added to the case in the CalWIN system. In CalSAWS, the infant must be pended to the program and the infant supplement must be added in the rate summary page.

EDBC Mismatch Reason: Benefit Amount Mismatch

Clean-Up Instructions:

Adding the Infant to the Case:

1. Add the Infant to the Case per your county policy. See **Job Aid: Add a Person to an Existing Case and Existing Program for more information**
2. On the Case Summary Page, Click the **View Details** on the Foster Care Program Block to access the **Foster Care Detail** page (Figure 8)
3. Click the **Edit** button on the Foster Care Detail page
4. Enter the **Beginning Date of Aid** in the Date field for the infant and Click the **View Date.** The page will refresh with date entered
5. Click the **Add** button on the Program Persons section (Figure 9)

Figure 8 – Case Summary Page

Figure 9 – Foster Care Program Detail Page

Details	Screenshots

6. Select the desired **infant**, enter the **Application Date**, and the **Beginning Date of Aid** (figure 10)
7. Click the **Save and Return** button
8. Click the **Save and Return** button again to confirm choices and return to the Foster Care Detail Page
9. Click the **Save and Return** button and navigate to the Case Summary page.
10. Place the cursor over **Eligibility** on the Global Navigation bar
11. Select **Customer Information** from the Local Navigator
12. Complete the following tabs from the Task Navigation bar under the **Non-Financial** link for the infant:
 	
    A. Individual Demographics,
    B. Vital Statistics,
    C. Household Status,
    D. Relationship,
    E. Complete the Absent parent page per county policy
	Figure 10 – Foster Care Person Detail Page

Details	Screenshots

Issuing Infant Supplement Payment for Foster Care:

13. Place the cursor over **Eligibility** on the Global Navigation bar
14. Select **Customer Information** from the Local Navigator
15. Expand the **Foster Care** section of the Task Navigation bar
16. Click the **Child Placement** link on the Task Navigation bar
17. On the Child Placement List Page, Click the **Edit** button for the desired placement to access the Child Placement Detail Page
18. Click the **Add** button in the Infant Supplement page section (Figure 11)

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

Customer Information

Case Number:
[   ] Go

Person Search
▶ Non Financial
▶ Financial
▼ Foster Care
   Placement Authority
   Child Placement
   Deprivation
   Re-Evaluation
   Placement Verification
   Permanency Plan Court Order
   Non-Minor Dependent
Verifications
MC 355
EBT Account List
MAGI Verifications
MAGI Eligibility
Run EDBC
Manual EDBC
Needs
Service Arrangements
▶ ABAWD
EDBC Results

Child Placement Detail

* - Indicates required fields   [Images] [Save and Return] [Cancel]

Child Name: **Placement Name:** *   **Placement Type:** *
[   ]   [Select]   [Short Term Residential T▼]

Payee: **Care Provider Relationship to Child:**
Same as Placement   [▼]

Use County Funds: *
[No ▼]

Begin Date: *   **End Date:**
[06/23/2022] 📅   [   ] 📅

Placement ID:
880057450

Rate List ✳

Type	Rate	Level Of Service	Level of Care	Begin Date	End Date	
Standard State Rate		STRTP		06/23/2022		Edit
						Add

Infant Supplement

Infant Name	Begin Date	End Date	
No Data Found			
			Add

Special Care Increment

Type	Amount	Begin Date	End Date	
No Data Found				
				Add

Figure 11 - Child Placement Detail Page

Details	Screenshots

Details

19. On the Infant Supplement Detail page (Figure 10):
    a. Select the infant form the **Infant Name** drop list
    b. Select **Yes/No** from the **"Is the infant paced in a Whole Family Foster Home?"** drop list
    c. Select **Yes/No** from the "**Do the caregiver and the minor dependent parent have a shared responsibility plan?"** drop list
    d. Select **Yes/No** from the **"Is there a Parenting Support Plan (PSP) on file?"** drop list
       Note: this question will only appear if this is NMD case
    e. Enter the desired date in the **Begin Date** field
    f. Click **Save and Return** to confirm choices
    g. Click **Save and Return** on the Child Placement Detail page.

20. **Run EDBC** for all available months to issue the Infant Supplement

Screenshots

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

Customer Information

Case Number:
[   ] [Go]

Person Search
▶ Non Financial
▶ Financial
▼ Foster Care
  Placement Authority
  Child Placement
  Deprivation
  Re-Evaluation
  Placement Verification
  Permanency Plan Court Order
  Non-Minor Dependent
Verifications
MC 355
EBT Account List
MAGI Verifications
MAGI Eligibility
Run EDBC
Manual EDBC
Needs
Service Arrangements
▶ ABAWD
EDBC Results

Infant Supplement Detail

✱- Indicates required fields   [Save and Return] [Cancel]

Infant Name: ✱
[▾]

Is the infant placed in a Whole Family Foster Home? ✱   [▾]

Do the care giver and the minor dependent parent have a shared responsibility plan? ✱   [▾]

Begin Date: ✱   **End Date:**
[   ] 📅   [   ] 📅

[Save and Return] [Cancel]

Last Updated On 08/17/2022 4:51:47 PM By: 1030944

This Type 1 page took 0.51 seconds to load.

Figure 12 – Foster Care Infant Supplement Detail Page

Details	Screenshots

Issuing Infant Supplement Payment for Kin-GAP:
 	
21. Place the cursor over **Eligibility** on the Global Navigation bar
22. Select **Customer Information** from the Local Navigation bar
23. Expand the **Kin-GAP** section of the Task Navigation bar
24. Click the **Rate Summary** link on the Task Navigation bar
25. On the Kin-GAP Rate Summary page (Figure 13), click the **Add** button in the Infant Supplement page section
26. On the Kin-GAP Infant Supplement Detail Page (Figure 12):
  a. Select the infant form the **Infant Name** drop list
  b. Select **Yes/No** from the **"Is the infant placed in a Whole Family Foster Home?"** drop list
  c. Select **Yes/No** from the "**Do the caregiver and the minor dependent parent have a shared responsibility plan?**" drop list
  d. Enter the desired date in the **Begin Date** field
  e. Click the **Save and Return** button to confirm choices
  f. Click the **Save and Return** button on the Kin-GAP Rate Summary page
 	
27. **Run EBDC** for all available months to issue the Infant Supplement
	
	Figure 13 – Kin-GAP Infant Supplement Detail Page

Details	Screenshots

5

Update Education Travel Reimbursements

This guide provides detailed actions that end-users will be required to update Education Travel Reimbursement rate amounts.

Counties Impacted:
01 – Alameda
37 – San Diego
40 – San Luis Obispo
57 - Yolo

The impacted counties utilized generic Education Travel Reimbursement (ETR) Descriptions for Foster Care cases receiving an ETR. Because of this, some of the ETRs were mapped to CalSAWS incorrectly.

In CalSAWS, ETR information is captured in the Child Placement Detail Page.

The following values were unable to be mapped correctly and were mapped to a default Value of "8 - 24 miles or more" in the CalSAWS Education Travel Reimbursement Detail Page:

- County 01 Value - 0T Education Travel Reimburse
- County 37 Value - 2B Education Reimbursement
- County 40 Value - 1E Education Travel Reimbursement
- County 40 Value - 2A FC Educ. Reimburse Non-Recur
- County 40 Value - 2B FC Educ. Reimburse Recur
- County 57 Value - 1A Education Mileage Reimbursement

Figure 14 – Child Placement Detail Page

Details	Screenshots
EDBC Mismatch Reason: Benefit Amount Mismatch **Clean-Up Instructions:** 1. Place the cursor over **Eligibility** on the Global Navigation bar 2. Select **Customer Information** from the Local Navigator 3. Click the **Foster Care** link on the Task Navigation bar 4. Click the **Child Placement** link on the Task Navigation bar to access the **Child Placement List** page 5. Click the **Name** hyperlink for the desired placement on the Child Placement List page to access the **Child Placement Detail** Page 6. Click the **Edit** button on the Child Placement Detail Page. 7. Scroll down to the **Education Travel Reimbursement** section (Figure 14) to verify the rate 8. If the rate is incorrect, Click **Edit** to access the **Education Travel Reimbursement Detail** Page 9. Select the **Type** from the drop-down list and the corresponding **Distance to School of Origin/Rate** from the second dropdown, as well as the **Begin Date** (Figure 14) 10. Click the **Save and Return** button. 11. Click the **Save and Return** button on the Child Placement Detail Page. 12. **Run EDBC** for the desired months to issue the corrected rate	 **Figure 15 – Education Travel Reimbursement Detail Page**

Details	Screenshots

6

Update Relationship Page

This guide provides detailed actions that end-users will be required to update the Relationship page. Review the converted data to make sure the parents associated with the program do not have parental control over a Foster Care, Kin-GAP, or AAP child.

EDBC Mismatch Reason: Benefit Amount Mismatch

Clean-Up Instructions:
1. Place the cursor over **Eligibility** on the Global Navigation bar
2. Select **Customer Information** from the Local Navigator
3. Click the **Non-Financial** link on the Task Navigation bar
4. Click the **Relationship** link on the Task Navigation bar to access the **Relationship List** page
5. Click the **Edit** button next to the person record that needs to be updated (figure 16)
6. On the **Relationship Detail** page, update the Responsible Relative by unchecking the box. Update the Had Parental Control by unchecking the box (figure 17)
7. Change Reason, select a reason from drop down. New Reported Date enter the date you are completing or county business practice.
   Note: Change Reason has **NO** impact on the CWS programs.
8. Click the **Save and Return** button

Figure 16 – Child Relationship List Page

Figure 17 – Child Relationship Detail Page

Details	Screenshots

7

Non-Minor Dependent's Other Program Assistance Page

This guide provides detailed actions that end-users will be required to update the Other Program Assistance Page for a Non-Minor Dependent extended benefits. The CalSAWS system requires a Foster Care record for the NMD 18th birthday.

EDBC Mismatch Reason: Benefit Amount Mismatch

Clean-Up Instructions:

1. Place the cursor over **Eligibility** on the Global Navigation bar
2. Select **Customer Information** from the Local Navigator
3. Click the **Non-Financial** link on the Task Navigation bar
4. Click the **Other Program Assistance** link on the Task Navigation bar to access the **Other Program Assistance List** page
5. Click the **Add** button

CalSAWS

Case Name:
Case Number:

📖 Journal ✅ Tasks ❓ Help 📄 Resources 📄 Page Mapping 🖼 Imaging 📤 Log Out

Contra Costa UAT2 | 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**
Contact
Root Questions
Individual Demographics
Vital Statistics
Household Status
Relationship
Citizenship

Other Program Assistance List

[Continue]

▸ **Root Questions**

Display

From: [   ] 📅   To: [   ] 📅   [View]

[Add]

Name	Type of Assistance	Begin Date	End Date
No Data Found			

[Add]

Figure 18 – Other Program Assistance List Page

Details	Screenshots
6. On the **Other Program Assistance Detail** page Select the name of the NMD 7. From the **Type of Assistance** drop down field select Foster Care 8. From the **State** drop down field select Ca 9. From the **County** drop down field select your county 10. From the **Aid Code** drop down field select the aid code the NMD received on their 18th Birthday. 11. From the **Begin Date** field enter the month the NMD turned 18 12. From the **End Date** field enter the end of the month the NMD turned 18 13. From the I**s this record for a child who lived with his/her parent(s)?** Select No from the drop- down field 14. From the **Verified** drop-down field, Select Verified 15. Click the **Save and Return** button	
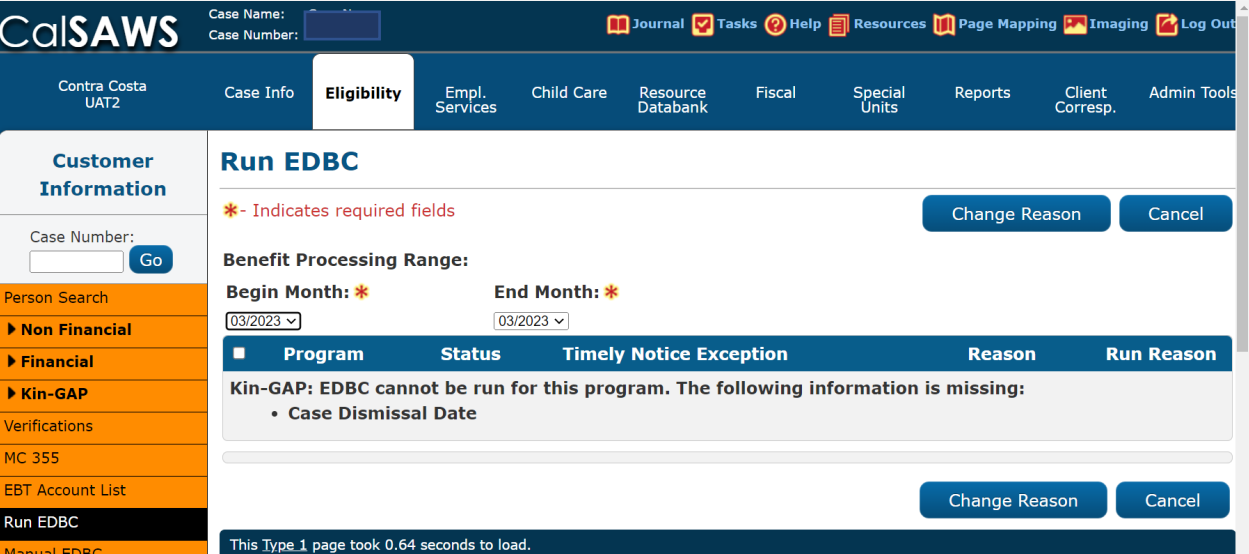
Figure 19 – Other Program Assistance Detail Page

Details	Screenshots

8

<div align="center">Kin-GAP Summary Page</div>

This guide provides detailed actions that end-users will be required to update the Kin-GAP Summary page. Review the Kin-AP Summary Detail page for correct converted date. The CalSAWS system requires a Case Dismissal date when running EDBC. If missing the Dismissal date EDBC will give you a hard validation. (Figure 21)

EDBC Mismatch Reason: Benefit Amount Mismatch

Clean-Up Instructions:

1. Place the cursor over **Eligibility** on the Global Navigation bar
2. Select **Customer Information** from the Local Navigator
3. Click the **Kin-GAP** link on the Task Navigation bar
4. Click the **Kin-GAP Summary** link on the Task Navigation bar to access the **Kin-GAP Summary List** page
5. Click the **Edit** button for the existing record.
6. Review the Kin-GAP Summary page for correct information
7. Enter the Case Dismissal Date in the **Case Dismissal Date** field
8. Click the **Save and Return** button

Figure 20 – Kin-GAP Summary Page

Figure 21 – Run EDBC Page- Hard Validation Message