

Program Discontinued

Priority Level: 1

Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care, GA/GR, Medi-Cal, RCA

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.

When EDBC was run in CalSAWS, active Programs in the CalWIN system are now reflecting a Program Discontinuance in CalSAWS. Discontinuance reasons include but are not limited to: Failure to Provide (FTP) Verifications, Over Income, Over Resources, CF Recert Expired, No Eligible Member, etc... Users will need to run EDBC in CalSAWS to find the actual discontinuance reason. Based on the reason for discontinuance, the User may need to update the appropriate data collection pages (Individual Demographics, Citizenship, Household Status, Relationship, Income, Customer Reporting, Verifications, etc.) and rerun EDBC.

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	MESSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalWORKs	Program Discontinued	06/30/2022	Over Income	1		

**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.

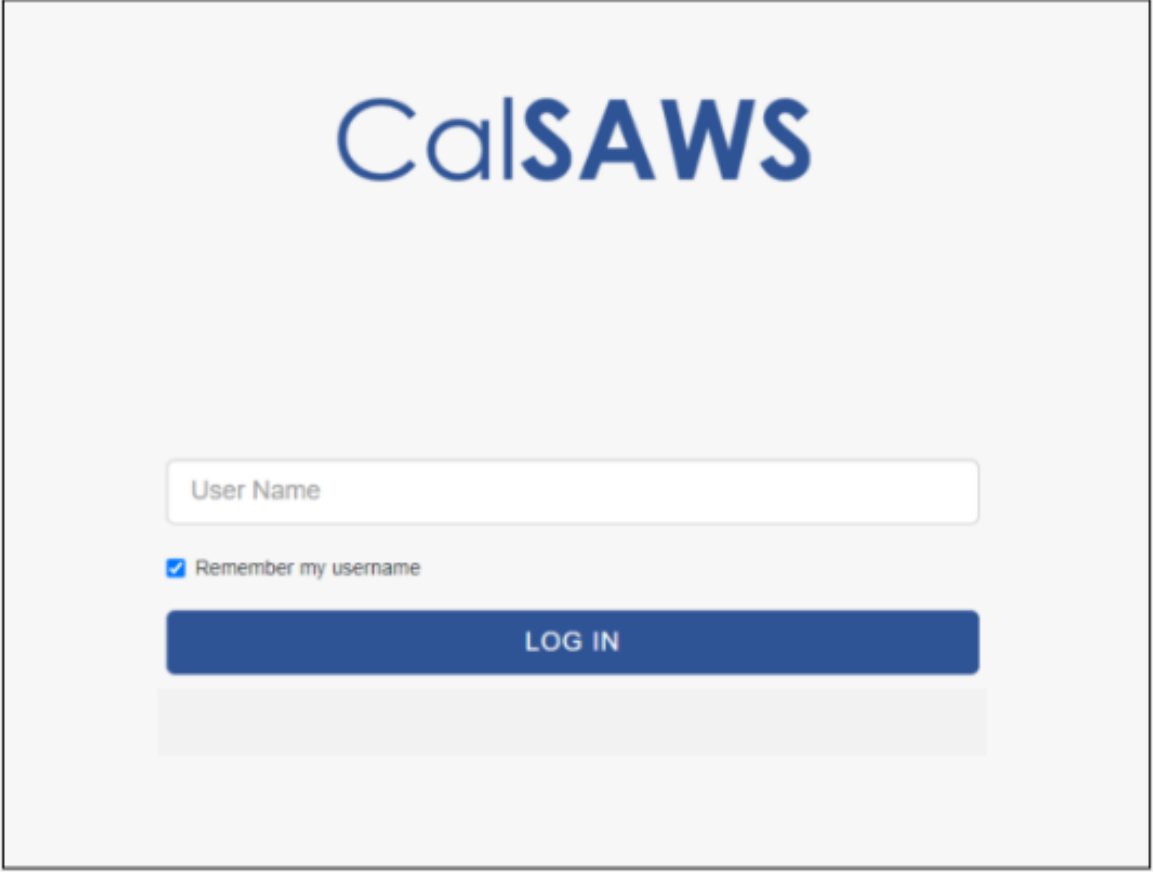
In the steps to clear the Yellow Banner detailed below, we will review a variety of examples showing failed EDBC results for Program Discontinued EDBC mismatch reasons.


Program Status Reason EDBC Mismatch Reasons			
<a href="#">No Eligible Member: Ineligible Non-Citizen</a>	<a href="#">CalFresh Recertification Expired</a>	<a href="#">Unrelated Primary Applicant</a>	<a href="#">No Eligible Child - No Deprivation</a>

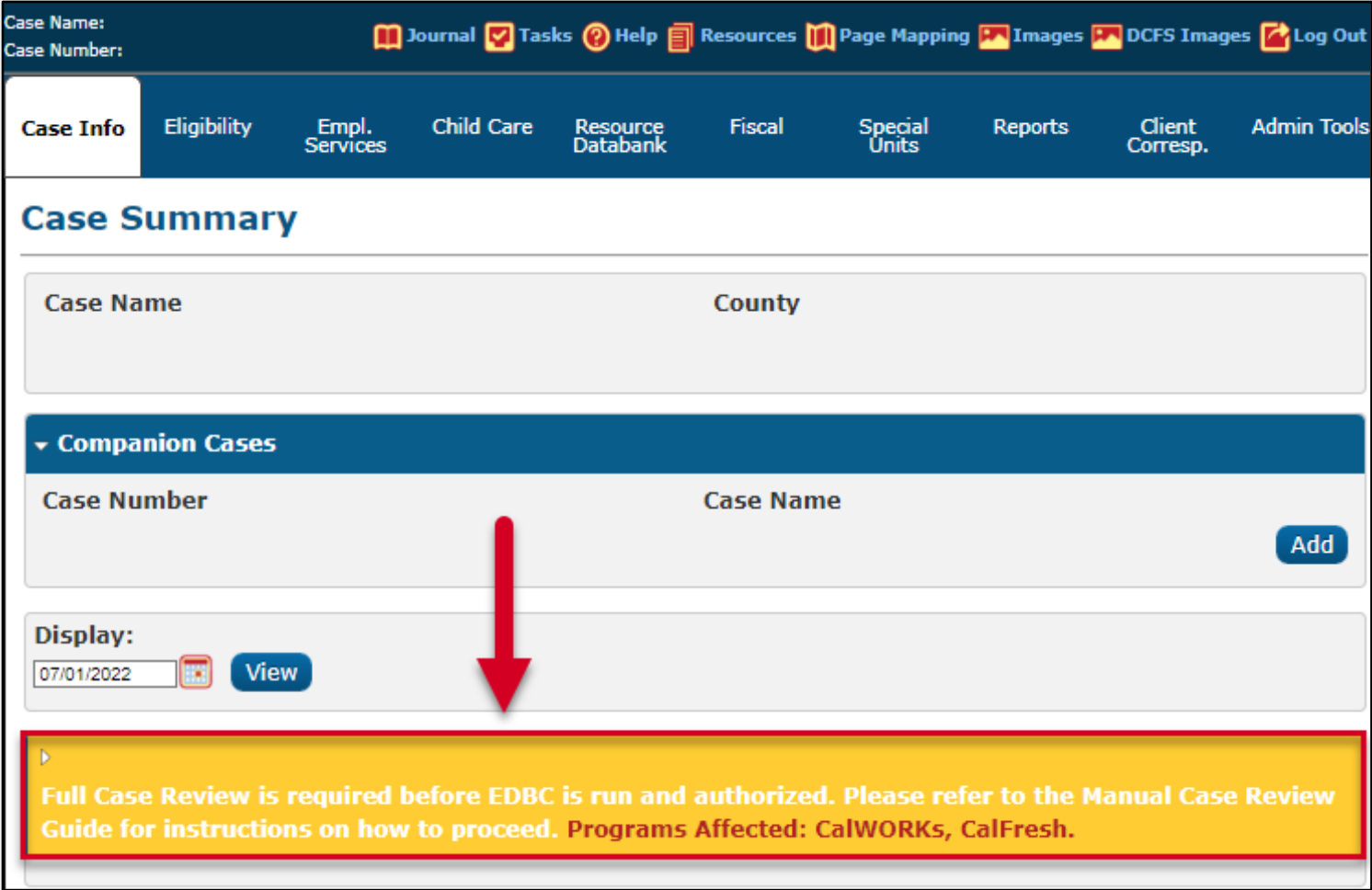
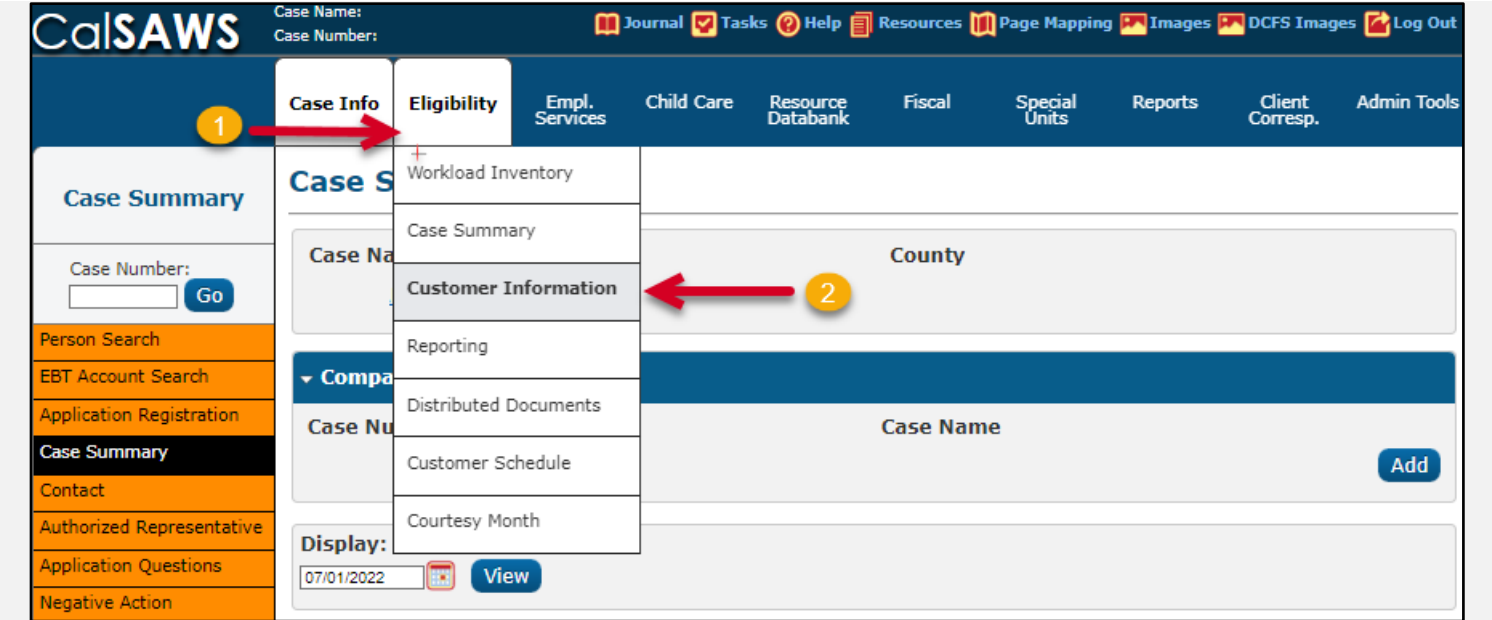
<a href="#">Country of Citizenship Not Populated and/or Section Code Update</a>	<a href="#">No Eligible Member – Failed MAGI</a>	<a href="#">Over Resources</a>	<a href="#">No Eligible Child – Mandatory/Optional Rules</a>
<a href="#">HH Members Discontinued for “Gets SSI” Role Reason</a>	<a href="#">Failure To Provide County Residence</a>	<a href="#">Over Income</a>	<a href="#">Update Good Cause Option for Immunization</a>
<a href="#">Failure To Provide Verification</a>	<a href="#">Failure To Provide Name/Identity</a>	<a href="#">No Absent/Unmarried Parent Record</a>	<a href="#">No Appl – Req Person</a>

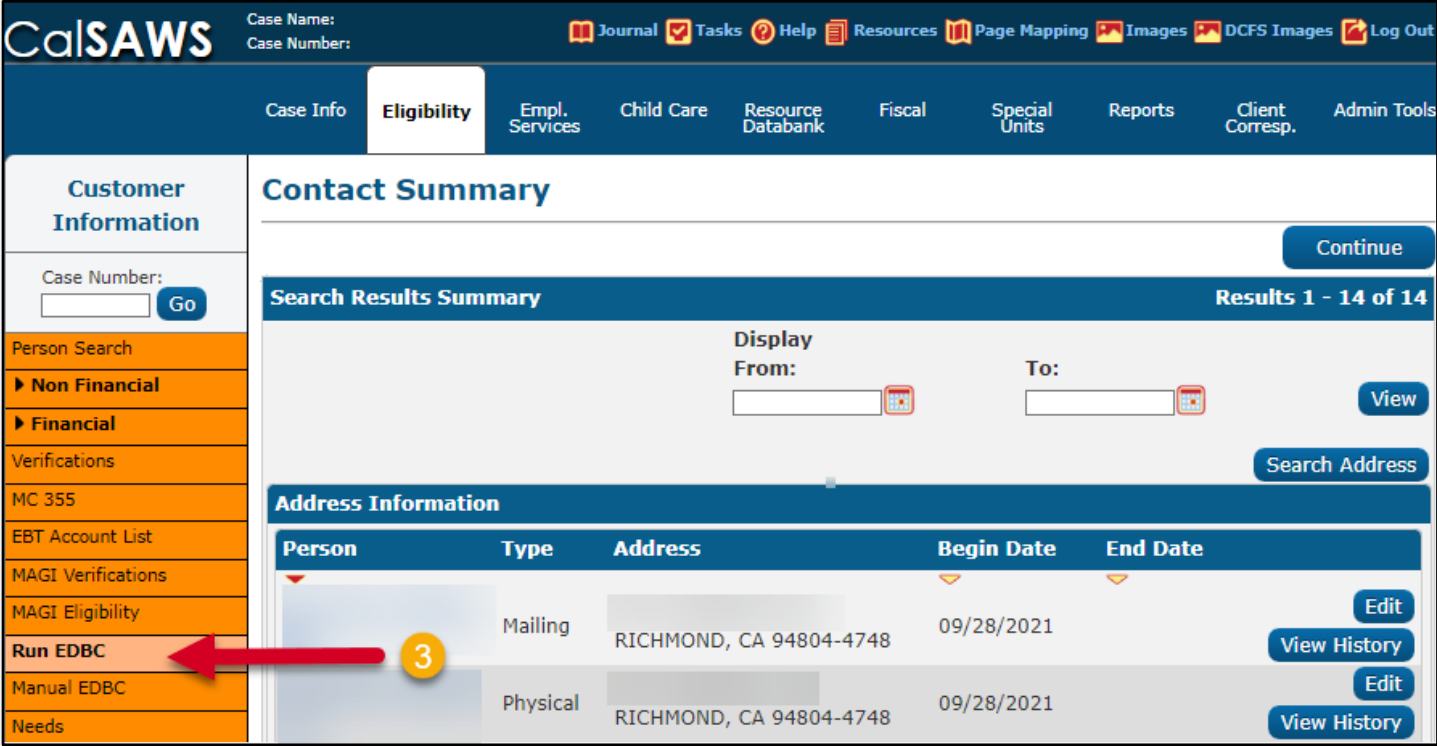
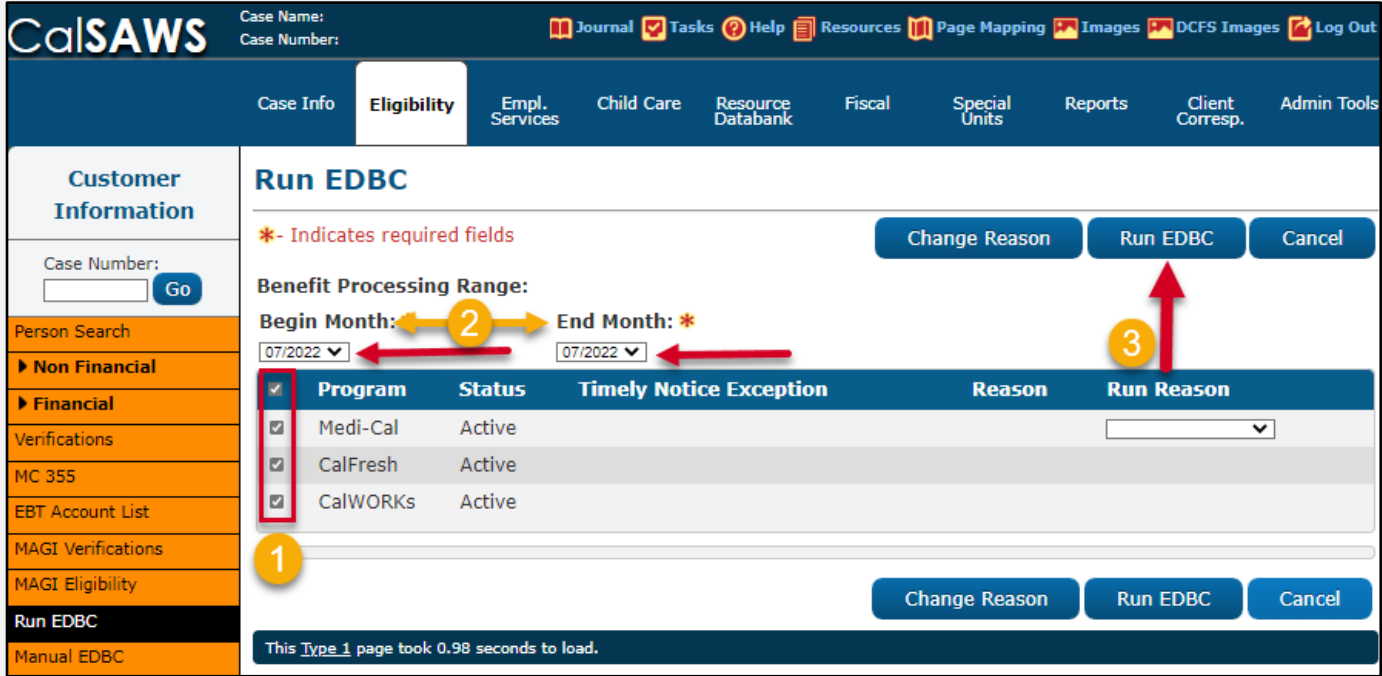
Examples

Program Discontinued

Steps to Clear Alert		Screenshot
1	<b>Log in</b> to CalSAWS by entering your Username and Password	

Steps to Clear Alert		Screenshot
2	<p>On the Homepage:</p> <p>1. Enter the case number and click on the <b>Submit</b> button to be navigated to the Case Summary page.</p> <p>★ <b>Note:</b> This step is not necessary if already on the Case Summary page for the desired case</p> <p>★ Note the Yellow Banner on the Case Summary Page</p>	

Steps to Clear Alert		Screenshot
		
3	<p>On the Case Summary Page:</p> <ol style="list-style-type: none"><li>1. Click on the <b>Eligibility</b> tab on the Global navigator.</li><li>2. Click on the <b>Customer Information</b> tab on the Local navigator.</li></ol>	

Steps to Clear Alert		Screenshot
	<p>From the Contact Summary page:</p> <ol style="list-style-type: none"><li>Click on <b>Run EDBC</b> tab on the Task navigator.</li></ol>	
4	<p>On the Run EDBC page:</p> <ol style="list-style-type: none"><li>Select all applicable <b>Programs</b>.</li></ol> <p>★ Note: Program fields must be selected first or the Begin and End Months will show grayed out.</p> <ol style="list-style-type: none"><li>Populate your <b>Begin Month</b> and <b>End Month</b> with the next future Month. <b>Do not use multi-month EDBC to clear a Yellow Banner EDBC Mismatch alert.</b></li><li>Click <b>Run EDBC</b></li></ol> <p>⚠ 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.</p>	

Steps to Clear Alert

When running EDBC, there are two types of validations that a User may experience if eligibility criteria is missing or pending.

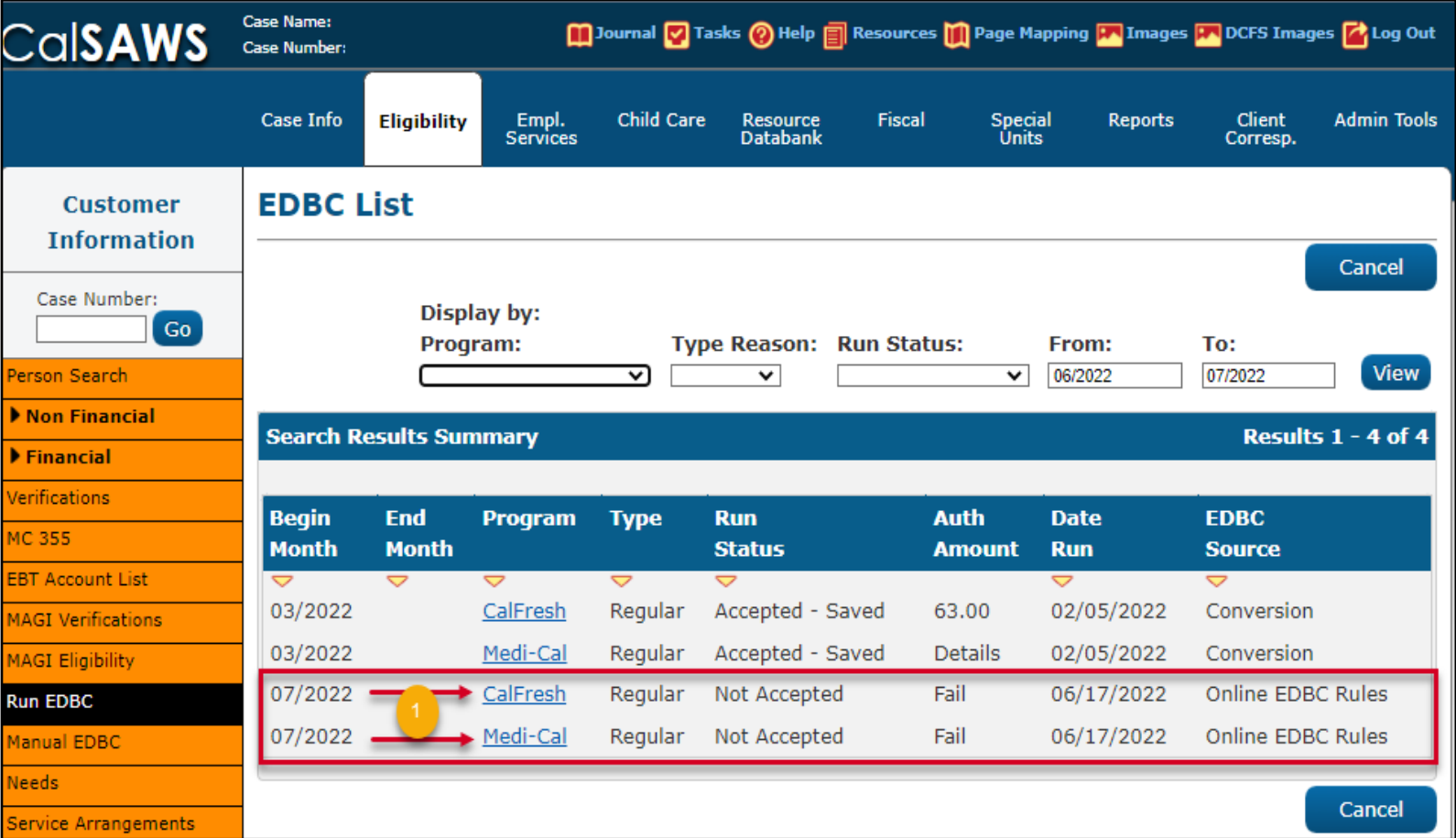
When experiencing a **Hard Validation**, EDBC cannot be run without the appropriate updates made to the data collection pages.

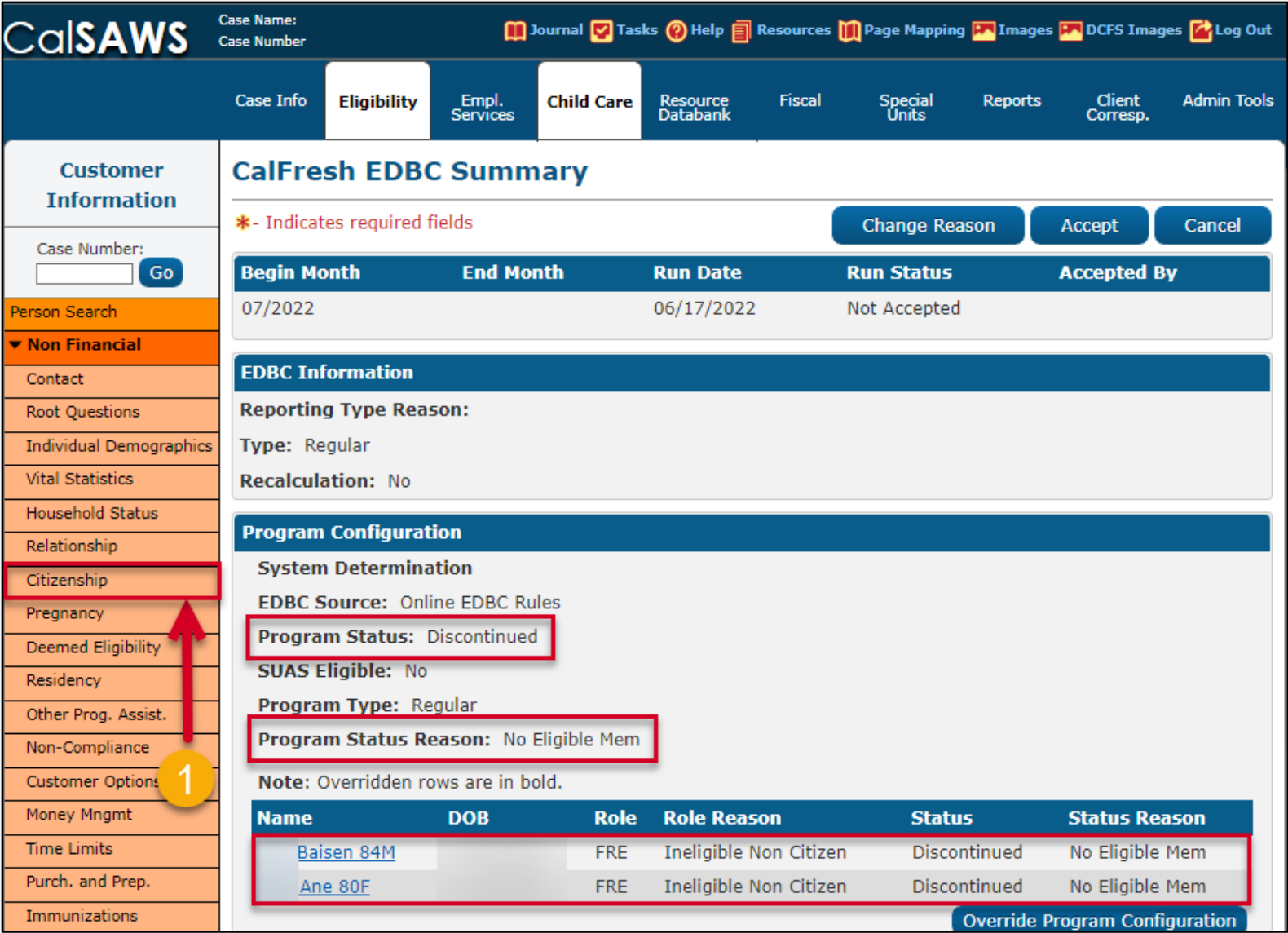
When experiencing a **Soft Validation**, EDBC can still be run without making changes to the data collection pages.

★

**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 policy.

Screenshot

Steps to Clear Alert		Screenshot
5	<p>In the following examples, we will review a variety of failed EDBC results for <b>Program Discontinued</b> EDBC mismatch reason and identify the corresponding Data Collection pages to review for updates prior to re-running EDBC.</p> <p>★ Note: If the discontinuance reason appears correct after case review, the User can accept and save the failed EDBC results.</p> <p>Access the EDBC List page</p> <p>1. Click on the <b>Program Link</b> to access the EDBC Summary Page and review the results.</p> <p>The following Job Aids are available to assist in CalSAWS located in the <b>Help Icon</b> in the Utilities navigator:</p> <p><b>EDBC - Online Definitions and Troubleshooting</b> <b>EDBC - Troubleshooting Incorrect Results</b></p>	

Steps to Clear Alert		Screenshot
6	<p>The User will need to review discontinuance details within the <b>Program Configuration</b> section of the EDBC Summary to identify and update the data collection pages that may impact the eligibility determination.</p> <p>In this first example, both HH Members are Discontinued for “Ineligible Non-Citizen” Role Reason.</p> <p>1. Navigate to the <b>Citizenship link</b> to review the Citizenship Detail Page for information that may need to be updated.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Citizenship and Sponsorship - Add or Edit Vital Statistics</b></p>	



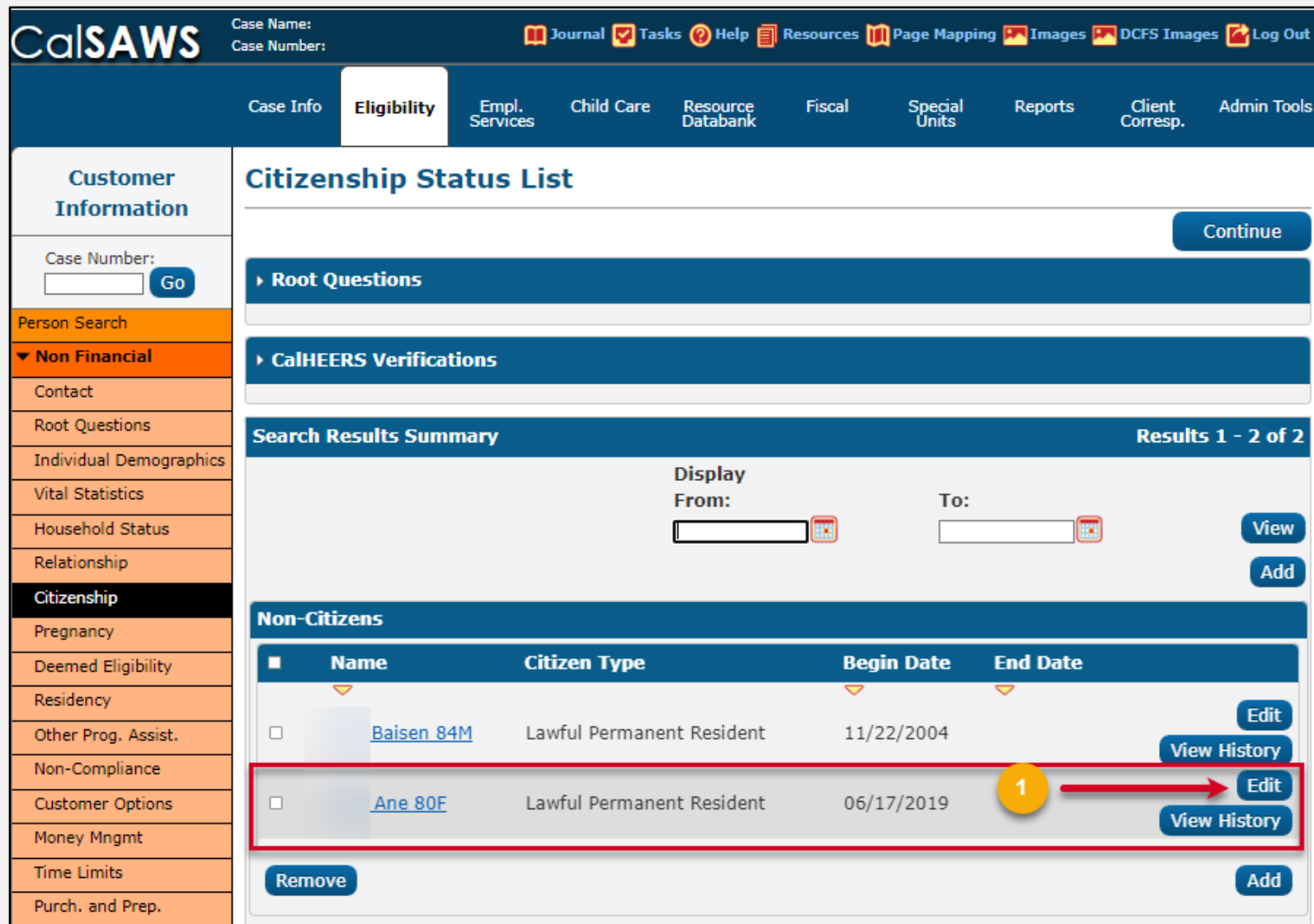
## Steps to Clear Alert

7

From the **Citizenship Status List** Page:

1. Select the **Edit** button next to the HH Member to review and edit the Individual's Citizenship Status Detail page.

## Screenshot



The screenshot displays the CalSAWS interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main navigation bar lists various modules: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The left sidebar shows a 'Customer Information' section with a 'Case Number' field and a 'Go' button. Below this is a 'Person Search' section with a dropdown menu for 'Non Financial' and a list of options: Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship, Citizenship (highlighted), Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, Customer Options, Money Mngmt, Time Limits, and Purch. and Prep. The main content area is titled 'Citizenship Status List' and includes a 'Continue' button. Below this are sections for 'Root Questions' and 'CalHEERS Verifications'. A 'Search Results Summary' section shows 'Results 1 - 2 of 2' and a 'Display From: To:' range. The 'Non-Citizens' table lists two individuals: 'Baisen 84M' and 'Ane 80F'. The row for 'Ane 80F' is highlighted with a red box, and a yellow circle with the number '1' points to the 'Edit' button for this row. The table columns are Name, Citizen Type, Begin Date, and End Date. The 'Edit' button is located to the right of the 'Ane 80F' row.

Non-Citizens				
	Name	Citizen Type	Begin Date	End Date
<input type="checkbox"/>	<a href="#">Baisen 84M</a>	Lawful Permanent Resident	11/22/2004	<a href="#">Edit</a> <a href="#">View History</a>
<input type="checkbox"/>	<a href="#">Ane 80F</a>	Lawful Permanent Resident	06/17/2019	<a href="#">Edit</a> <a href="#">View History</a>

Buttons: Remove, Add

8 In this example, the mandatory field **Country of Citizenship** and/or **Section Codes** were not populated and will need to be updated.

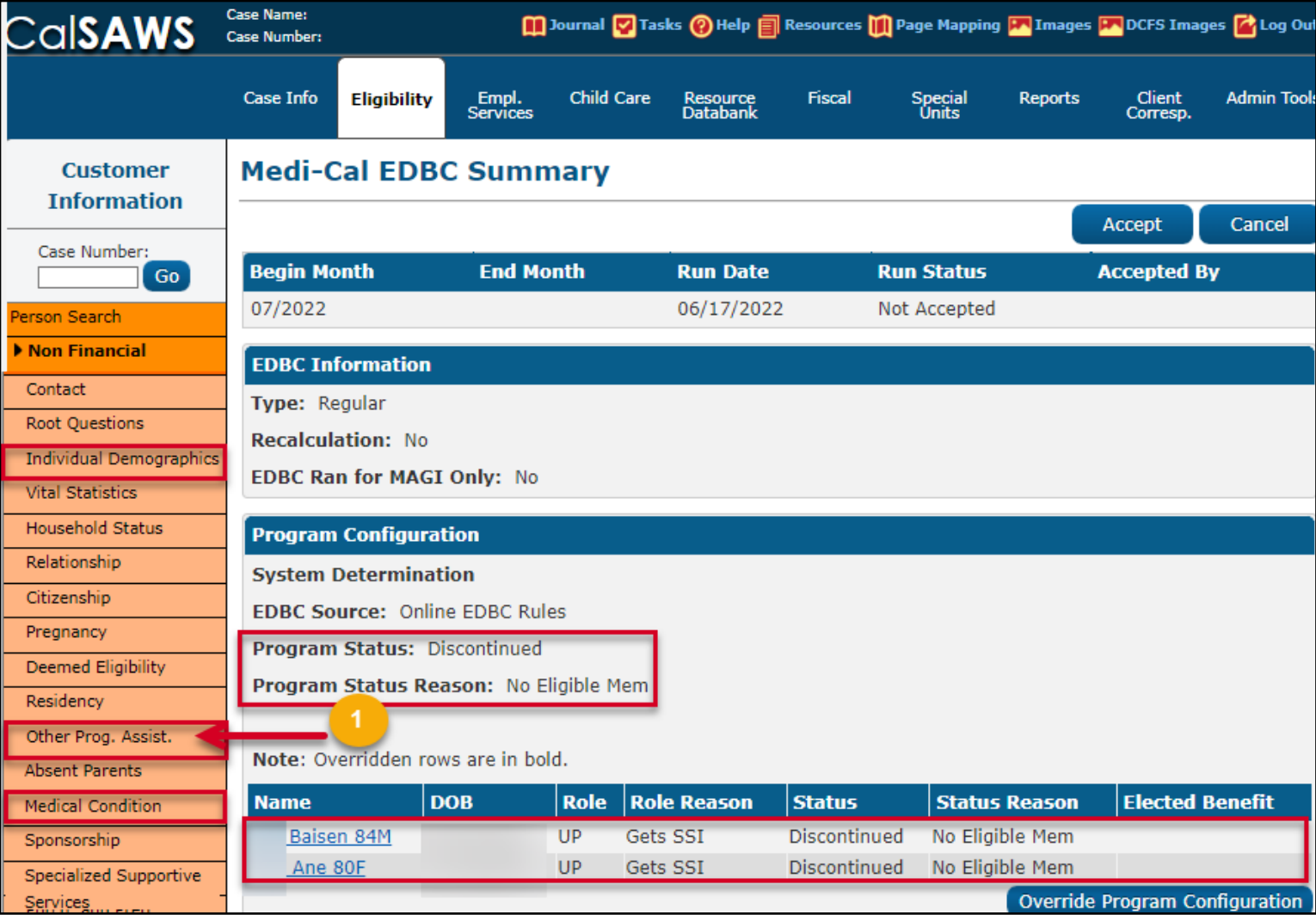
- 1. Enter **New Change Reason** and **New Reported Date**, as applicable.
- 2. Select the **Country of Citizenship** as reported and/or verified by the Individual.
- 3. Enter the correct **Document** Type if not already listed.
- 4. Select the correct **Section Code** if not already listed.
- 5. After reviewing and updating all other areas of the Citizenship Status Detail page, click **Save and Return**.


The following CalSAWS Reference Guide is available in the LMS:

CalSAWS Reference Guide – Change Reason

Additional data collection pages to review for completion:  
Individual Demographics, Vital Statistics, Sponsorship, Verifications

The screenshot shows the 'Citizenship Status Detail' page in the CalSAWS system. The page has a top navigation bar with 'Case Info' and 'Eligibility' tabs. A left sidebar lists various data collection areas, with 'Citizenship' currently selected. The main form area contains several fields, many of which are marked with a red asterisk (\*) indicating they are required. Red boxes and arrows highlight these required fields: 'New Change Reason' and 'New Reported Date' at the top; 'Document' (with a dropdown menu showing 'I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code'), 'Section Code', and 'Country of Citizenship' in the middle; and 'A Number' at the bottom. The 'Save and Return' button is also highlighted with a red arrow. Other fields like 'Name', 'Name upon US Entry', 'Citizenship Type', 'Document First Name', 'Document Middle Name', 'Document Last Name', 'Document Date of Birth', 'Visa Number', 'SEVIS ID', 'Country of Passport Issuance', 'PRUCOL Reason', 'Issue Date', 'Adjustment Date', 'Verified', 'Expiration Date', and 'Five Year Bar Admin Verification' are also present but not highlighted.

Steps to Clear Alert		Screenshot
9	<p>Now on the Medi-Cal EDBC Summary Page, the User will need to review the <b>Program Configuration</b> section for the discontinuance details to identify the data collection pages that could potentially affect the program discontinuance.</p> <p>In this example, both HH Members are Discontinued for “Gets SSI” Role Reason.</p> <p>1. Navigate to the <b>Other Prog. Assist.</b> (Other Program Assistance) link to review for information that may need to be updated.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Other Program Assistance (OPA) Detail Page</b></p> <p>Additional Data Collection pages to review for completion: Individual Demographics, Medical Condition, Income.</p>	 <p>The screenshot displays the CalSAWS interface. On the left is a sidebar with a 'Customer Information' section containing a 'Case Number' field and a 'Go' button. Below this is a list of navigation links: 'Person Search', 'Non Financial', 'Contact', 'Root Questions', 'Individual Demographics', 'Vital Statistics', 'Household Status', 'Relationship', 'Citizenship', 'Pregnancy', 'Deemed Eligibility', 'Residency', 'Other Prog. Assist.', 'Absent Parents', 'Medical Condition', 'Sponsorship', 'Specialized Supportive Services', and 'Services'. The 'Other Prog. Assist.' link is highlighted with a red box and a yellow circle with the number 1. The main content area is titled 'Medi-Cal EDBC Summary' and includes 'Accept' and 'Cancel' buttons. Below this is a table with columns: 'Begin Month', 'End Month', 'Run Date', 'Run Status', and 'Accepted By'. The table contains one row with values: '07/2022', '06/17/2022', and 'Not Accepted'. The 'EDBC Information' section shows 'Type: Regular', 'Recalculation: No', and 'EDBC Ran for MAGI Only: No'. The 'Program Configuration' section includes 'System Determination' with 'EDBC Source: Online EDBC Rules', 'Program Status: Discontinued', and 'Program Status Reason: No Eligible Mem'. A note states 'Note: Overridden rows are in bold.' Below this is a table with columns: 'Name', 'DOB', 'Role', 'Role Reason', 'Status', 'Status Reason', and 'Elected Benefit'. The table contains two rows: 'Baisen 84M' and 'Ane 80F', both with a status of 'Discontinued' and a role reason of 'Gets SSI'. The 'Override Program Configuration' button is at the bottom right.</p>

Steps to Clear Alert		Screenshot
10	<p>In this example, the CalWORKs program is discontinued for: <b>FTP Verification</b>.</p> <p>1. Navigate to the <b>Verifications</b> link to review the items outstanding on the Verification List Page.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Verifications - Manage</b></p>	 <p>The screenshot displays the CalSAWS interface. On the left sidebar, the 'Verifications' link is highlighted with a red box and a yellow circle containing the number '1'. The main content area shows the 'CalWORKs EDBC Summary' page. At the top, there are buttons for 'Change Reason', 'Accept', and 'Cancel'. Below this is a table with columns: 'Begin Month', 'End Month', 'Run Date', 'Run Status', and 'Accepted By'. The first row shows '07/2022', '06/17/2022', and 'Not Accepted'. Below the table is the 'EDBC Information' section, which includes 'Annual Reporting Period Begin Month: 02/2022', 'Reporting Type Reason: Child Only', 'Type: Regular', and 'Recalculation: No'. The 'Program Configuration' section shows 'System Determination' with 'EDBC Source: Online EDBC Rules' and 'Aid Code:'. Below this, the 'Program Status' is 'Discontinued' and the 'Program Status Reason' is 'FTP Verification'. A note states: 'Note: Overridden rows are in bold.' At the bottom, there is a table with columns: 'Name', 'DOB', 'Role', 'Role Reason', 'Status', and 'Status Reason'. The first row shows 'Famous 12F', 'MEM', 'Discontinued', and 'FTP Verification'. The second row shows 'Calleon 11M', 'MEM', 'Discontinued', and 'FTP Verification'. A red box highlights the 'Status' and 'Status Reason' columns for both rows. At the bottom right, there is a button labeled 'Override Program Configuration'.</p>

Steps to Clear Alert

11

From the **Verification List** page, review the requested item hyperlink to view and edit the item requested, or:

1. Click **Verify** to confirm the item received and update the case record.

★

**Note:** Pending items can also be “verified” by adjusting the item’s status within the appropriate Data Collection page. Clicking on any of the items’ hyperlinks will allow you to address each item individually.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog 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

GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Verification List

\*- Indicates required fields

Status: \*  
Pending

From:

To:

Continue

View

Search Results Summary

Results 1 - 17 of 17

Add

Type	Name	Request Date	Due Date	Postponed ES	
<input type="checkbox"/>	<a href="#">Income</a>	05/01/06	05/11/06	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">Income</a>	05/01/06	05/11/06	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">School End Date</a>	08/23/07	09/02/07	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">School End Date</a>	08/23/07	09/02/07	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">Other Program Assistance</a>	10/01/11	10/01/11	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">Name/Identity</a>	11/03/16	11/13/16	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">Country of Birth</a>	02/26/21	03/03/21	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">Vital Statistics</a>	02/26/21	03/03/21	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">US Citizenship</a>	02/26/21	03/03/21	Postpone	VerifyEditView History
<input type="checkbox"/>	<a href="#">School Attendance</a>	02/26/21	03/08/21	Postpone	VerifyEditView History

Page 13



Steps to Clear Alert

12

In this example, the CalFresh program is discontinued for: **CF Recert Expired**

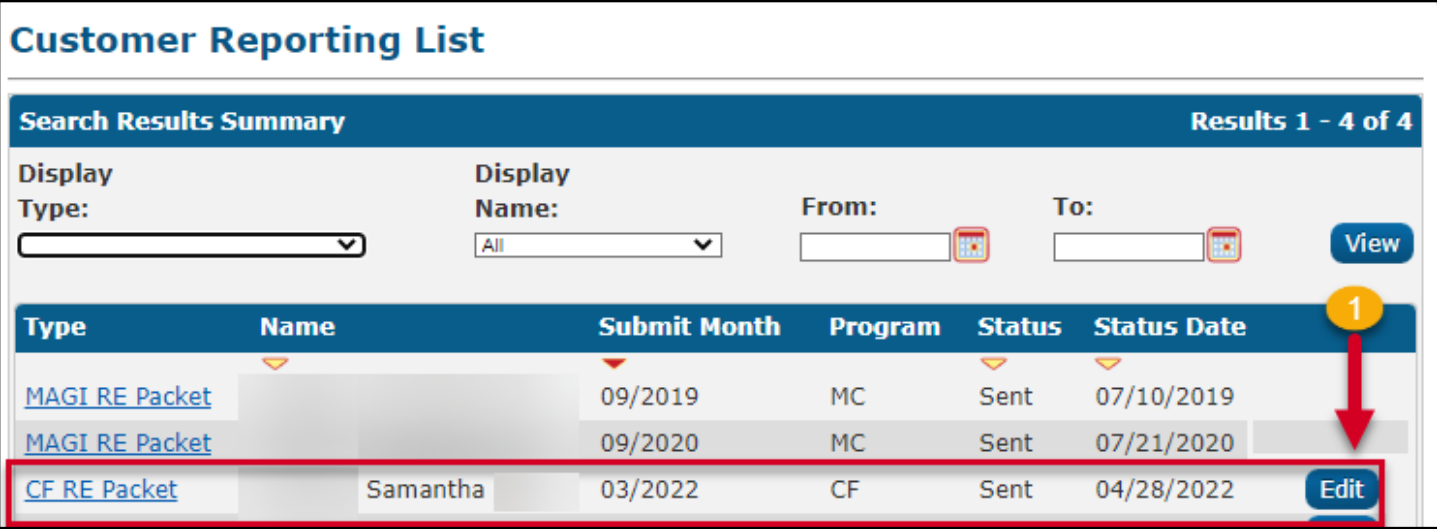
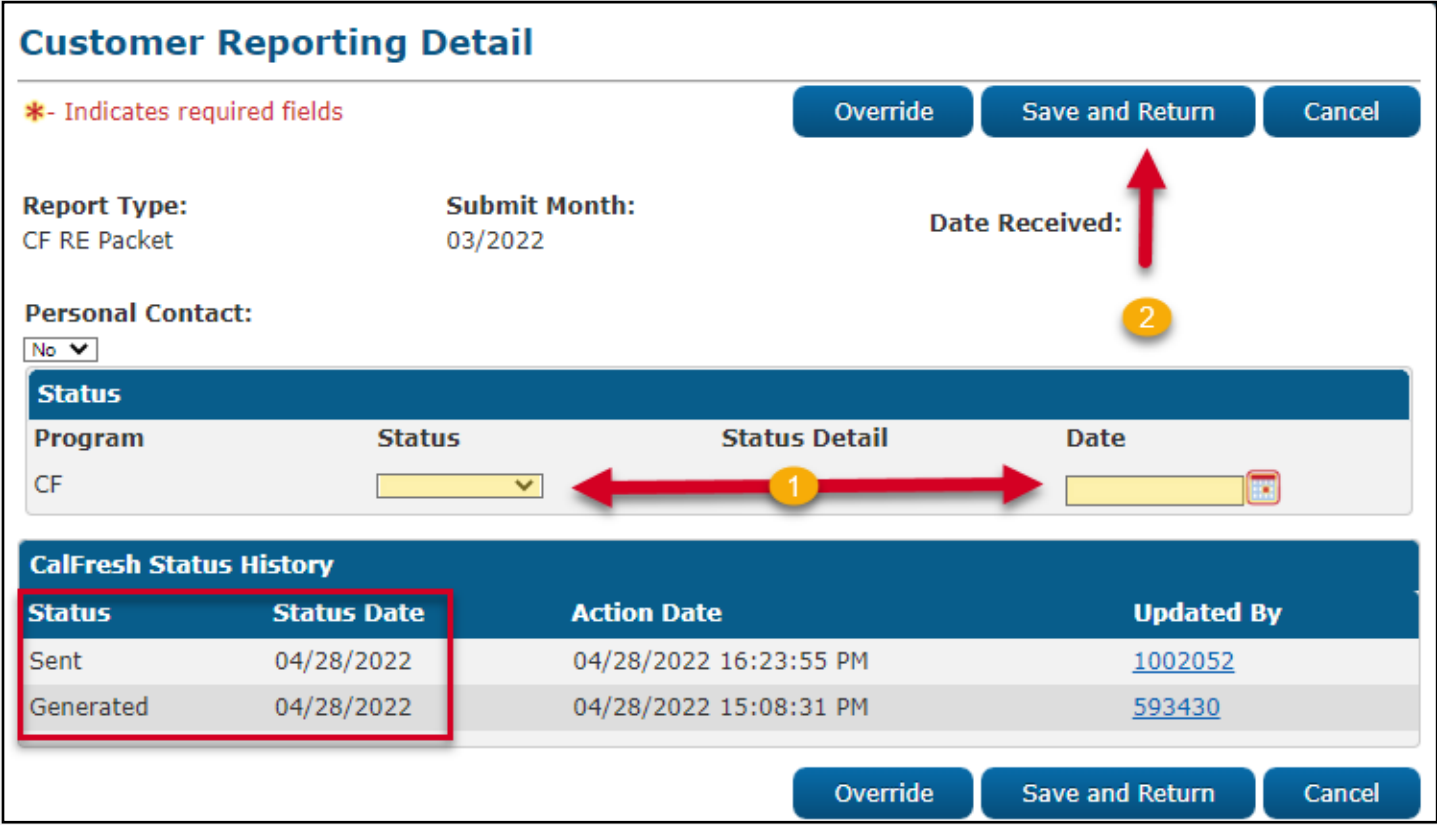
1. Navigate to the Eligibility tab and click on the **Reporting** link to review the outstanding Customer Report.

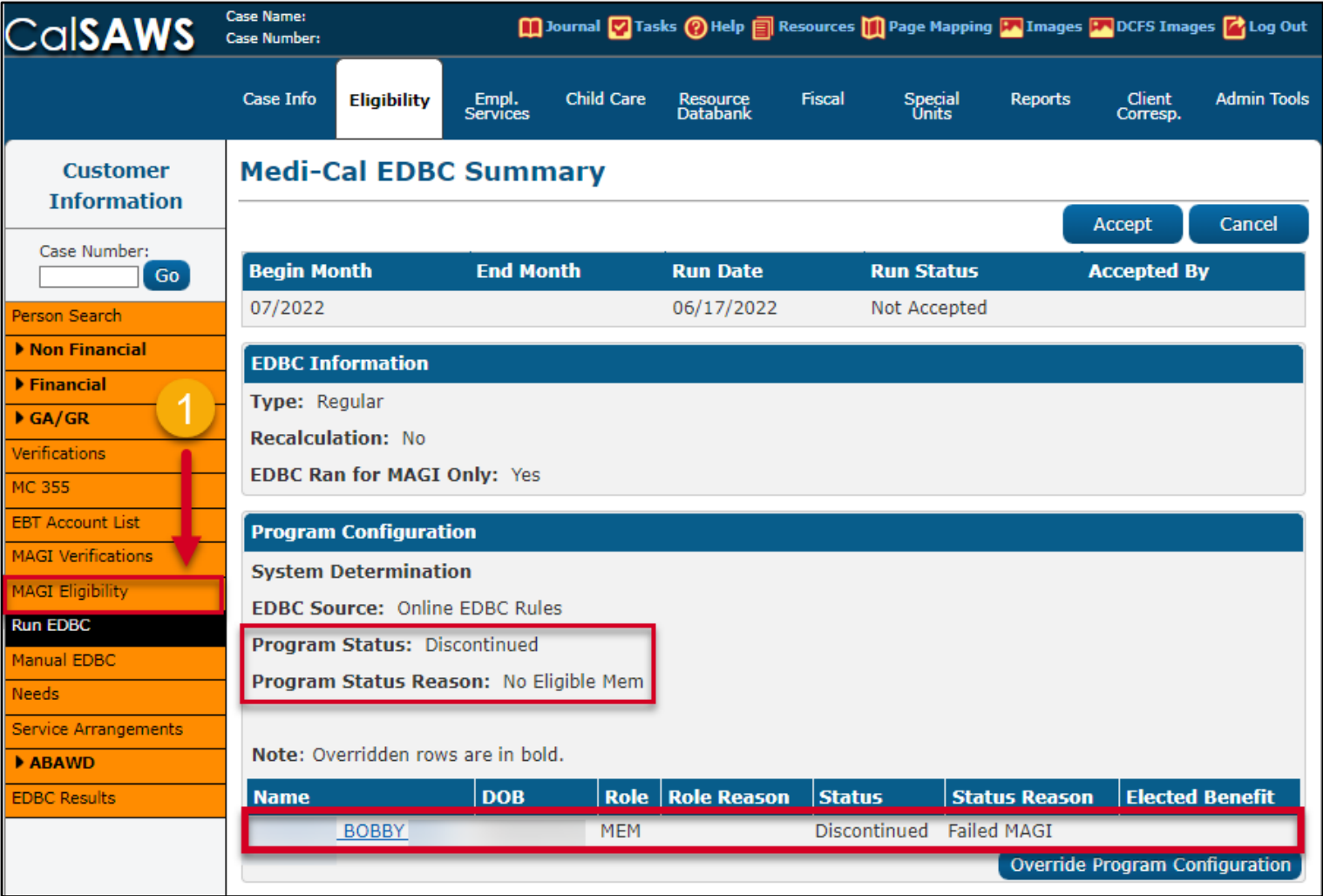
The following Job Aids are available to assist with review and processing of Customer Reports in CalSAWS:

CalWORKs CalFresh Re-Evaluation and Periodic Reporting  
Transitional CalFresh (TCF) Processing  
Barcoding  
Semi-Annual Report (SAR 7) - Process  
Medi-Cal Renewal Packets

Screenshot

The screenshot displays the CalSAWS web application interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main menu on the left lists various options under 'Customer Information', 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 EDBC Results. The central panel shows the 'Eligibility' tab selected, with a sub-menu containing 'Workload Inventory', 'Case Summary', 'Customer Information', 'Reporting', 'Distributed Documents', 'Customer Schedule', and 'Courtesy Month'. The 'Reporting' link is highlighted with a red box and a yellow circle containing the number '1'. Below this, a table displays reporting data with columns: Begin Month, Run Date, Run Status, and Accepted By. The table shows a single row for 07/2022 with a Run Date of 06/17/2022 and a Run Status of 'Not Accepted'. The 'Program Configuration' section at the bottom indicates the 'Program Status' is 'Discontinued' and the 'Program Status Reason' is 'CF Recert Expired'. A table below this shows two rows for 'Samantha L. 27F' with a Role of 'MEM' and a Status of 'Discontinued', both with a Status Reason of 'CF Recert Expired'.

Steps to Clear Alert		Screenshot
13	<p>On the <b>Customer Reporting List</b> page, review the CF RE Packet in <b>Sent</b> status to access the Customer Reporting Detail Page.</p> <p>1. Click <b>Edit</b> to access the CF RE Packet sent 04/28/2022</p>	
14	<p>On the <b>Customer Reporting Detail</b> page, review the CalFresh Status History</p> <p>1. Update the <b>Status</b> field as appropriate and enter the applicable <b>Date</b>.</p> <p>2. Click <b>Save and Return</b> to save changes to the CF RE Packet status</p>	

Steps to Clear Alert		Screenshot
15	<p>In this example, the Medi-Cal program is discontinued for: <b>No Eligible Member – Failed MAGI</b></p> <p>1. Navigate to the <b>MAGI Eligibility</b> link to begin review of MAGI results.</p> <p>The following CalSAWS Quick Guide is available in the LMS:</p> <p><b>CalSAWS Quick Guide – MAGI Determination Request</b></p> <p>The following Job Aids are available to assist with MAGI and Medi-Cal eligibility review in CalSAWS:</p> <p><b>Customer Options Detail - Add</b> <b>Medi-Cal - Tax Household</b> <b>Medi-Cal - MAGI Referrals and Eligibility Determinations</b> <b>Medi-Cal – MAGI Discontinuances</b> <b>Medi-Cal CalHEERS MAGI Eligibility Review</b></p>	 <p>The screenshot displays the CalSAWS interface for the 'Medi-Cal EDBC Summary'. The left sidebar contains a 'Customer Information' menu with various options. The 'MAGI Eligibility' option is highlighted with a red arrow and a yellow circle containing the number 1. The main content area shows the 'Medi-Cal EDBC Summary' page. The page includes a table of EDBC runs with columns: Begin Month, End Month, Run Date, Run Status, and Accepted By. The 'Program Configuration' section shows 'System Determination' with 'EDBC Source: Online EDBC Rules', 'Program Status: Discontinued', and 'Program Status Reason: No Eligible Mem'. A table at the bottom shows a row for 'BOBBY' with status 'Discontinued' and reason 'Failed MAGI'.</p>



## Steps to Clear Alert

16

On the MAGI Determination List page, the **Begin Month**, **End Month** and **Program Identifier** must be selected before the User can **Request MAGI**.

1. A soft validation is presented when attempting to **Request MAGI** without the minimum requirements being met to make a MAGI determination.
2. Navigate to the **Tax Household** link to review and update Tax Household information as prompted.

**Note:** Users can review any previous MAGI **Determination** by clicking on the hyperlink to the applicable benefit month.

## 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

► GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

► ABAWD

EDBC Results

MAGI Determination List

\*- Indicates required fields

A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- Tax household information is missing for the following person(s):
  - BOBBY

Request MAGI Determination

Begin Month: \*

End Month: \*

Program Identifier: \*

Life Change Event:

☐ Bypass Primary Contact Matching Criteria
☐ Request Lift Options
☐ Request Negative Action Determination
☐ Restart VLP e-Verification

Request MAGI

Display MAGI Determinations

Begin Date:

End Date:

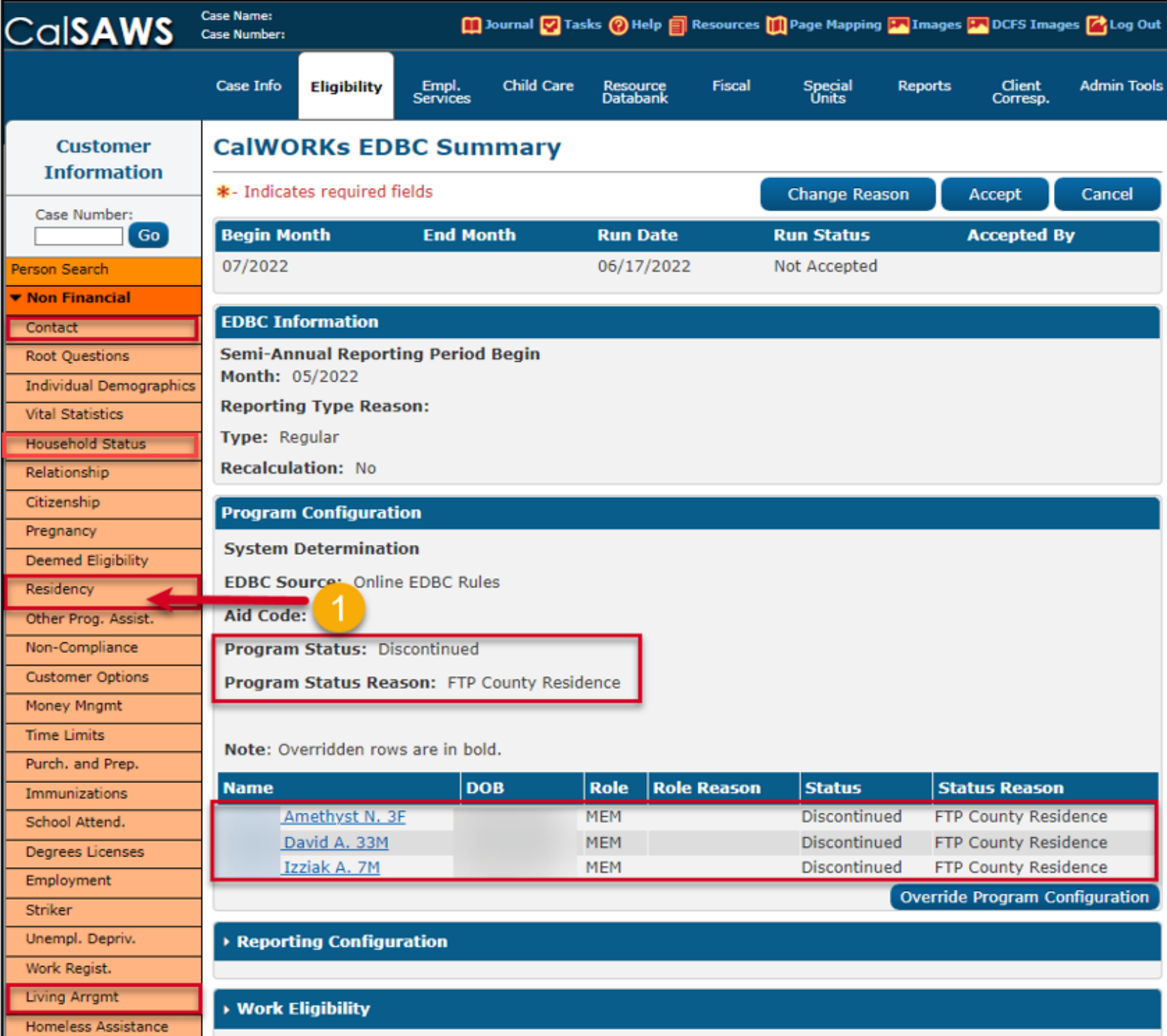
View

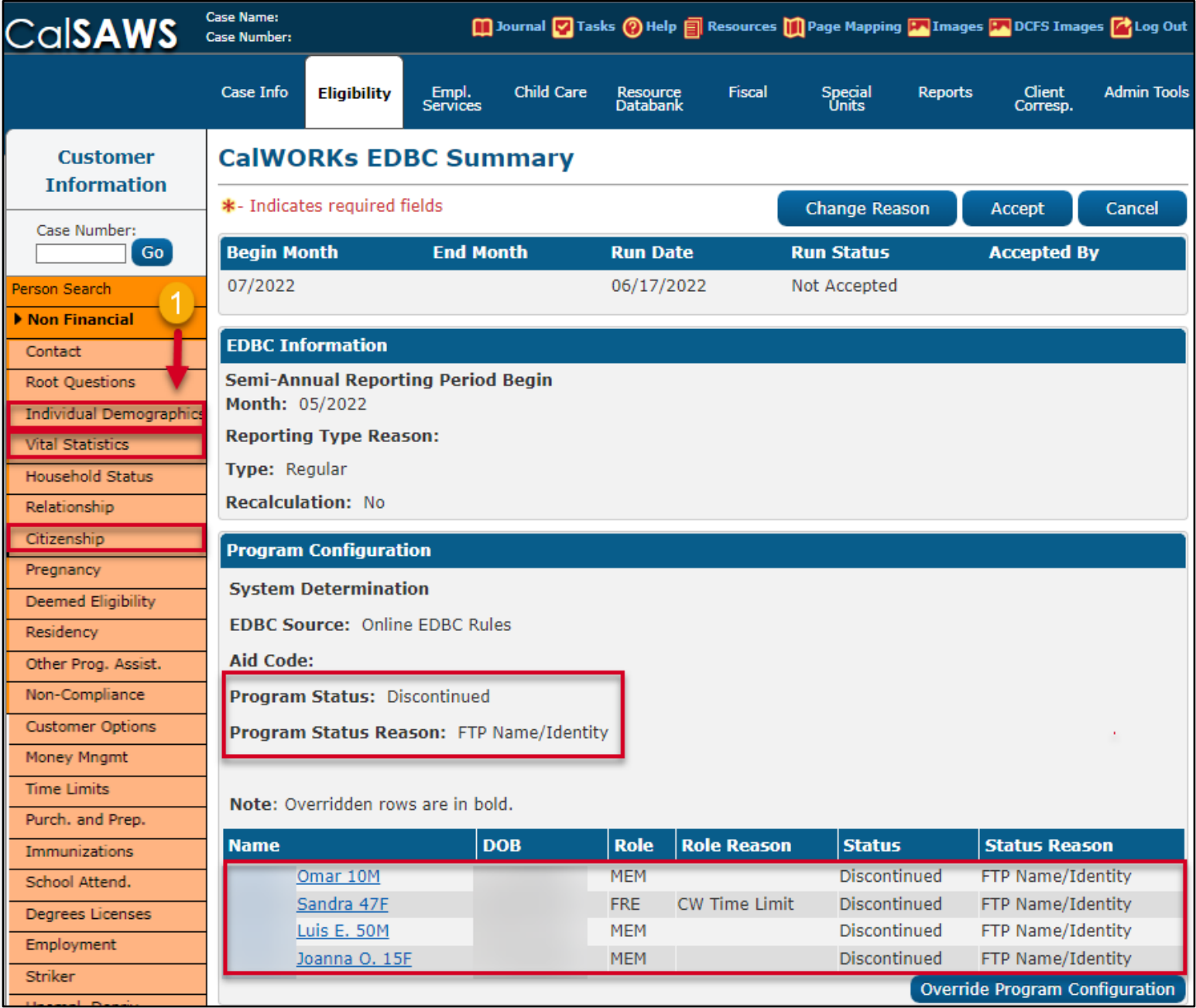
Search Results Summary

Results 1 - 1 of 1

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
07/2016	<a href="#">Determination</a>	Complete	06/05/2016 8:38 AM	CalHEERS	Not Eligible

Steps to Clear Alert		Screenshot
17	<div>On the <b>Tax Household Detail Page</b>, review and update the following mandatory fields:</div> <div><div>1. Select the <b>Primary Tax Filer</b> from the dropdown box.</div><div>2. Indicate whether the Individual is <b>required to file taxes</b> for the current year.</div><div>3. Indicate whether the Individual <b>is planning to file taxes</b> for the current year.</div><div>4. Click <b>Save</b> to add the record.</div></div> <div>User can now navigate back to the MAGI Eligibility page or run full Medi-Cal hierarchy, as applicable, to assess for appropriate Medi-Cal eligibility and accept and save the results.</div>	<p>The screenshot shows the CalSAWS interface for the 'Tax Household Detail' 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 categories: 'Customer Information', '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', 'GA/GR', 'Verifications', 'MC 355', 'EBT Account List', and 'MAGI Verifications'. The main content area is titled 'Tax Household Detail' and contains several fields: 'Name' (BOBBY), 'Primary Tax Filer' (a dropdown menu with a red box and callout 1), 'Filing Year' (2022), 'Is this person expected to be required to file taxes for the current year?' (a dropdown menu with a red box and callout 2), 'Is this person planning to file taxes for the current year?' (a dropdown menu with a red box and callout 3), 'Expected Filing Status' (a dropdown menu), 'Caretaker Relative' (a dropdown menu), 'Is this person expected to be claimed as a Dependent by a non-custodial parent?' (a dropdown menu), and 'Who claims this person as a Dependent this year?' (a dropdown menu). At the bottom, there is a section for 'Projected Annual Income' with a red box and callout 4, containing 'Projected Annual Income Amount' and 'Is the Projected Annual Income amount correct?' (a dropdown menu). The 'Save' and 'Cancel' buttons are at the bottom right.</p>

Steps to Clear Alert		Screenshot
18	<p>In this example, the CalWORKs program is discontinued for: <b>FTP County Residence</b></p> <p>1. Navigate to the <b>Residency</b> Page to update and verify Residency information prior to re-running EDBC.</p> <p>Additional Data Collection pages to review for completion: Contact, Living Arrangement, Household Status, etc.</p>	

Steps to Clear Alert		Screenshot
19	<p>In this example, the CalWORKs program is discontinued for: <b>FTP Name/Identity</b></p> <p>1. Navigate to the <b>Individual Demographics</b> Page to update and verify and Individual information prior to re-running EDBC.</p> <p>Additional Data Collection pages to review for completion: Vital Statistics, Citizenship, Verifications, etc.</p>	 <p>The screenshot shows the CalSAWS Eligibility page. The left sidebar has a red box around the 'Individual Demographics' link, with a yellow circle and the number '1' next to it. The main content area is titled 'CalWORKs EDBC Summary'. It includes a table with columns: Begin Month, End Month, Run Date, Run Status, and Accepted By. The table shows one row with values: 07/2022, 06/17/2022, 06/17/2022, Not Accepted, and Not Accepted. Below this is the 'EDBC Information' section, which includes 'Semi-Annual Reporting Period Begin Month: 05/2022', 'Reporting Type Reason: Type: Regular', and 'Recalculation: No'. The 'Program Configuration' section includes 'System Determination' with 'EDBC Source: Online EDBC Rules' and 'Aid Code:'. Below this is a table with columns: Name, DOB, Role, Role Reason, Status, and Status Reason. The table shows four rows of data, all with a status of 'Discontinued' and a status reason of 'FTP Name/Identity'. The rows are: Omar 10M, Sandra 47F, Luis E. 50M, and Joanna O. 15F. A red box highlights the 'Program Status' and 'Program Status Reason' fields, and another red box highlights the table of discontinued individuals. The 'Override Program Configuration' button is at the bottom right.</p>

## Steps to Clear Alert

20

1. Click **Verify** to confirm receipt of any item that has been verified by the Participant. This will confirm the previous entry made by the user on the corresponding data collection page. In this example, the Individual Demographics page would be updated for Name/Identity, and the Vital Statistics page for Vital Statistics Identify if the user select either or both options.

The Verification list page will list and display any verifications that are in a pending status on the data collection pages.

On this page, Users can verify verifications and also send out a CW 2200 form, if needed.

Follow your county policy when adding verifications to the **Verification List** page.

For information on how to add, edit and view the details of verification requests, see Job Aid: **JA Verifications – Manage**

## Screenshot

The screenshot shows the CalSAWS interface. On the left is a sidebar with a 'Customer Information' section containing a 'Case Number' field and a 'Go' button. Below this is a list of navigation items: 'Person Search', 'Non Financial', 'Financial', 'Verifications' (highlighted with a red box), '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 'Verification List' and includes a 'Continue' button. Below the title is a search filter section with 'Status' (set to 'Pending'), 'From' and 'To' date pickers, and a 'View' button. A 'Search Results Summary' bar indicates 'Results 1 - 3 of 3'. The main table has columns: 'Type', 'Name', 'Request Date', 'Due Date', 'Postponed ES', and actions. It lists three verification requests for 'Omar': 'Name/Identity' (Request Date: 01/18/12, Due Date: 01/28/12), 'Vital Statistics Identity' (Request Date: 07/17/18, Due Date: 07/27/18), and 'School Attendance' (Request Date: 11/06/19, Due Date: 11/16/19). Each row has 'Postpone', 'Verify', 'Edit', and 'View History' buttons. A red box highlights the 'Verify' buttons for all three rows, and a red arrow points to the first 'Verify' button from a yellow circle with the number '1'. A 'Generate Form' button is at the bottom left of the table area.

Type	Name	Request Date	Due Date	Postponed ES	
Name/Identity	Omar	01/18/12	01/28/12		Postpone Verify Edit View History
Vital Statistics Identity	Omar	07/17/18	07/27/18		Postpone Verify Edit View History
School Attendance	Omar	11/06/19	11/16/19		Postpone Verify Edit View History



## Steps to Clear Alert

21

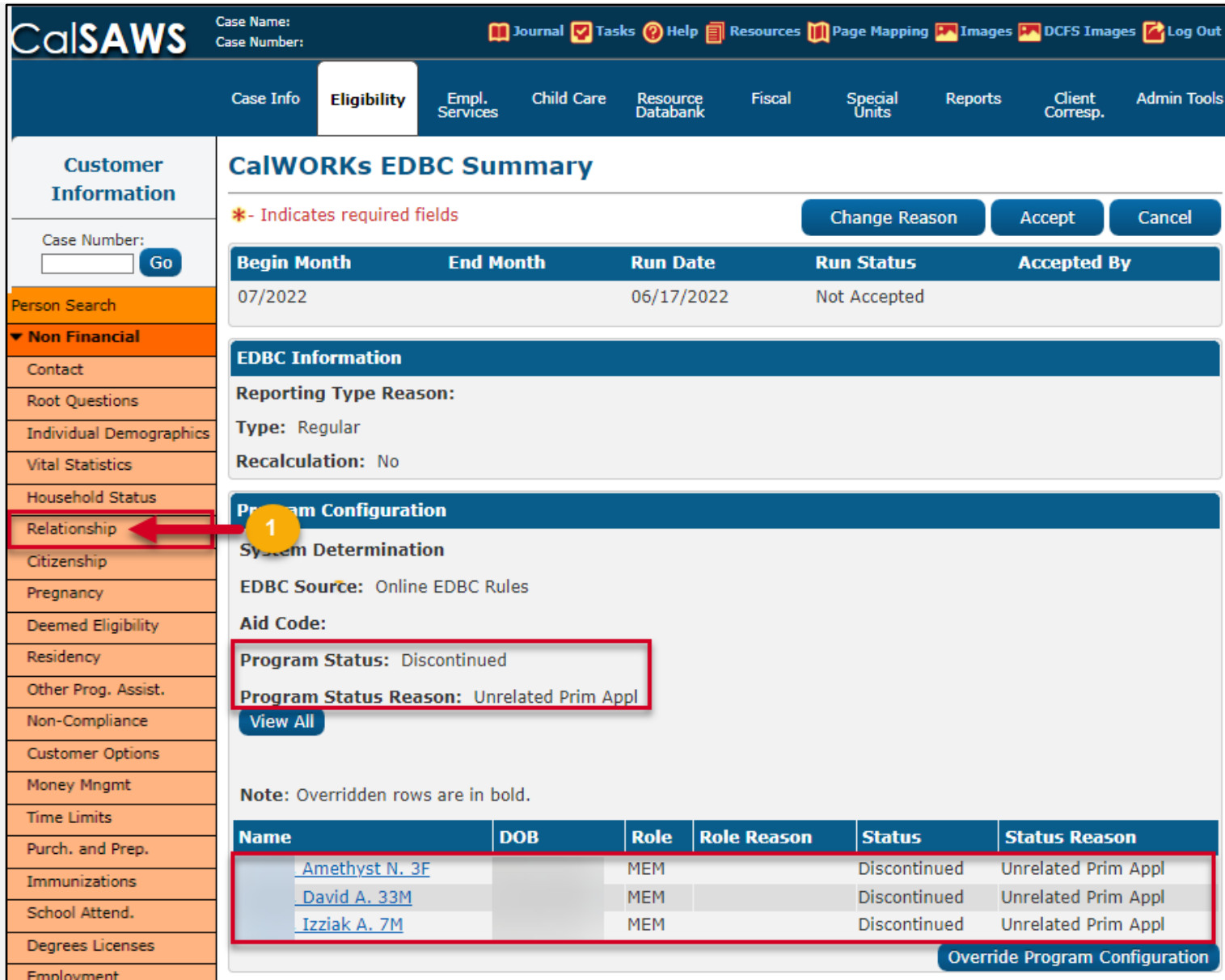
In this example, the CalWORKs program is discontinued for: **Unrelated Prim Appl** (Unrelated Primary Applicant)

1. Navigate to the **Relationship** Page to review and update any missing or incomplete records prior to re-running EDBC.

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

Create a Case – New Applicant  
Establish a Case - Existing Person  
JA Relationship Information – Add

## 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**

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

**Relationship**

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Employment

**CalWORKs EDBC Summary**

\*- Indicates required fields

Change Reason Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/17/2022	Not Accepted	

**EDBC Information**

Reporting Type Reason:

Type: Regular

Recalculation: No

**Program Configuration**

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

**Program Status:** Discontinued

**Program Status Reason:** Unrelated Prim Appl

View All

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Amethyst N. 3F		MEM		Discontinued	Unrelated Prim Appl
David A. 33M		MEM		Discontinued	Unrelated Prim Appl
Izziak A. 7M		MEM		Discontinued	Unrelated Prim Appl

Override Program Configuration

## Steps to Clear Alert

22 The status message on the **Relationship List** page reflects there are *no missing relationships* needing to be added to this case record.

There are **Parental Control** records reflecting **Yes**.

Users should navigate back to **Case Summary** page to review the Primary Applicant and Payee information within the CW Program.

## Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog 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

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

Relationship List

Number of relationships remaining to be created: 0

Continue

Search Results Summary

Results 1 - 6 of 6

Display by Relationship:

All Related

From:

To:

View

Add

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
David 33M	Parent (Biological/Adoptive)	Amethyst 3F	No			<div>Edit</div> <div>View History</div>
	Parent (Biological/Adoptive)	Izziak 7M	Yes			<div>Edit</div> <div>View History</div>
Izziak 7M	Sibling (full or half)	Amethyst 3F	No			<div>Edit</div> <div>View History</div>
Mikayla 27F	Spouse	David 33M	No			<div>Edit</div> <div>View History</div>
	Parent (Biological/Adoptive)	Izziak 7M	Yes			<div>Edit</div> <div>View History</div>
	Parent (Biological/Adoptive)	Amethyst 3F	Yes			<div>Edit</div> <div>View History</div>

Steps to Clear Alert		Screenshot
23	<p>On the <b>Case Summary Page</b>, review the <b>Case Name</b> (editable field), <b>Primary Applicant</b> and <b>Payee</b> information.</p> <p>Review Program Members in Active Status and all Persons Associated to Case and their respective household status.</p> <p>In this example the Primary Applicant, Mikayla, has been discontinued: out of the home.</p> <p>Case Name: David Primary Applicant/Recipient: Mikayla (out of home) Payee: David</p> <p>Follow county policy for case setup and Primary Applicant/Payee designation.</p> <p>If a new case needs to be established, the following Job Aid is available to assist:</p> <p><b>Create a Case – New Applicant</b> <b>Establish a Case - Existing Person</b></p> <p>If it is determined that a new Primary Applicant/Payee can be added since the Case Name remains In the Home, proceed to next steps:</p> <ol style="list-style-type: none"><li>1. Click <b>View Details</b> to navigate to the CalWORKs Detail page.</li></ol>	



Steps to Clear Alert

24

On the **CalWORKs Detail** page, review the **Administrative Roles** and **Program Persons** identified on the case.

1. Click **Add** to enter a new **Administrative Role**

Screenshot

CalSAWS

Case Name: David  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResourceDatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number:  
 Go

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  
Case Copy List

CalWORKs Detail

\* - Indicates required fields

View HistorySave and ReturnCancel

Date: \*  
07/01/2022View Date

Program Information

Status: \*ActiveStatus Reason:Source: \*Self-Service Portal

Application Date: \*08/03/2018EditRE Begin Month: 11/2021RE Due Month: \*10/2022

Reporting Type: Semi-Annual ReportingSAR Due Month: 04/2022

Automatically Reassign When Activated: No

Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees	
Mikayla 27F	Primary Applicant/Recipient	05/05/2021			Edit
David 33M	Payee	05/05/2021			Edit
David 33M	Additional Correspondence Recipient	05/05/2021			Edit

1Add

Program Persons

Name	Role	Role Reason	Status	Status Reason	
Amethyst 3F	MEM		Active		Edit
David 33M	MEM		Active		Edit
Izziak 7M	MEM		Active		Edit
Mikayla 27F	MEM		Discontinued		

RescindReapply


Secondary Assignment

Worker

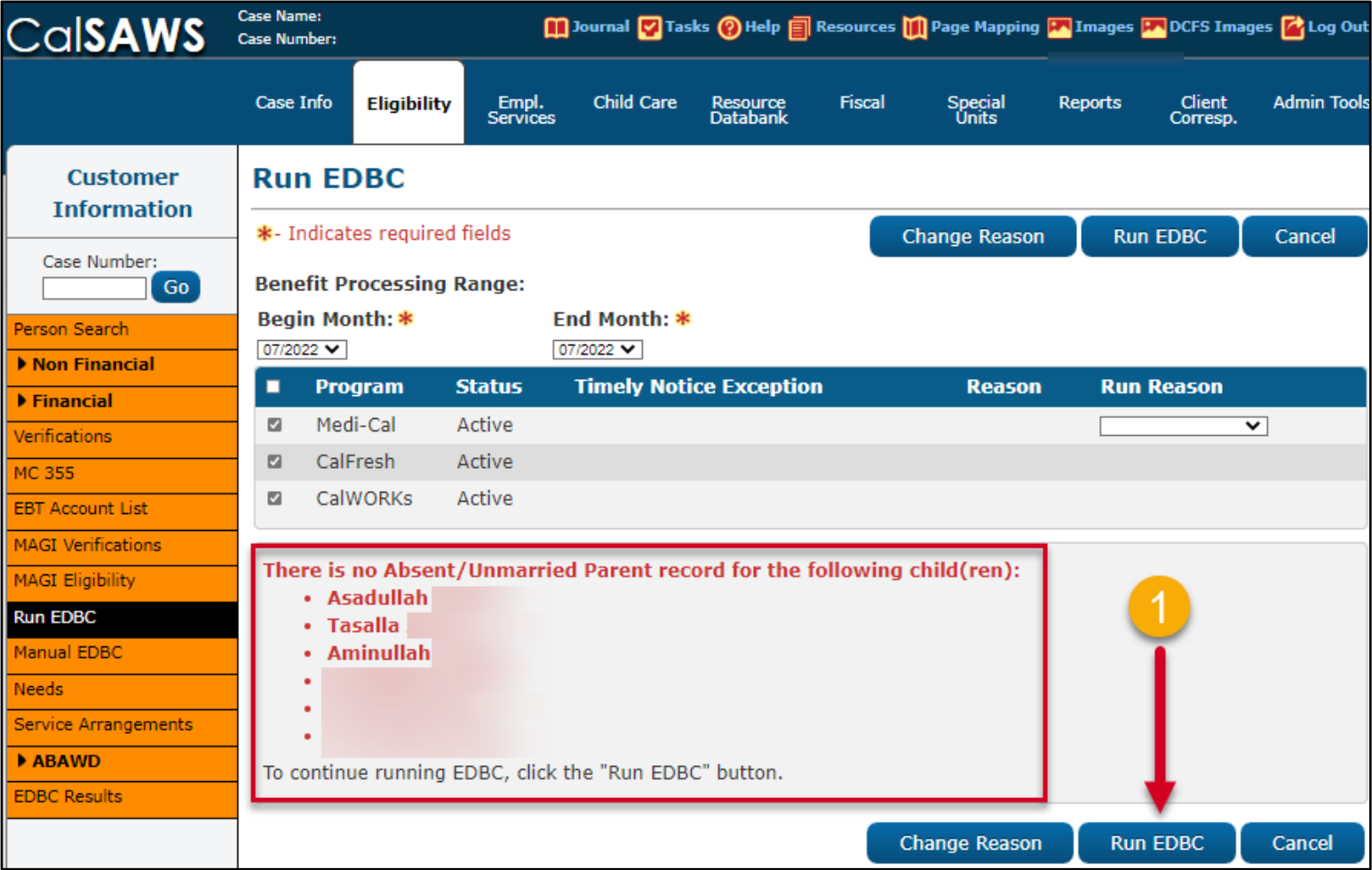
Select

View HistorySave and ReturnCancel

Steps to Clear Alert		Screenshot
25	<p>In the <b>Administrative Role Detail</b> page:</p> <ol style="list-style-type: none"><li>1. Select <b>Primary Applicant/Recipient</b> from the dropdown selection window.</li><li>2. Select the new Primary Applicant (Case) <b>Name</b>.</li><li>3. Enter the <b>Begin Month</b> of the change.</li><li>4. Click <b>Save and Return</b> to update the record.</li></ol>	<p>The screenshot shows the CalSAWS interface. At the top, there's a header with the CalSAWS logo and navigation links like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a secondary navigation bar with tabs: Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. On the left, there's a sidebar menu with options: Case Summary (highlighted), Person Search, EBT Account Search, Application Registration, Contact, Authorized Representative, Application Questions, and Negative Action. The main content area is titled 'Administrative Role Detail'. It includes a 'Case Number' field with a 'Go' button. Below this is a list of search options. The main form has fields for 'Administrative Role' (dropdown), 'Name' (dropdown), 'Begin Month' (calendar), and 'End Month' (calendar). Red arrows and numbered circles (1-4) point to these fields: 1 points to 'Primary Applicant/Recipient' in the Administrative Role dropdown, 2 points to 'David 33M' in the Name dropdown, 3 points to the Begin Month calendar, and 4 points to the 'Save and Return' button. At the bottom, there's a status bar indicating 'This Type 1 page took 0.54 seconds to load.'</p>

Steps to Clear Alert		Screenshot
26	<p>In this example, the CalFresh program is discontinued for: <b>Over Resources</b></p> <p>1. Navigate to the <b>Property</b> Page to update and verify and Individual information prior to re-running EDBC.</p> <p>★ Categorically Eligible: No Public Assistance: No Modified Categorical Eligibility: No</p> <p>Other factors may contribute to the need for a Resource determination for this CF Program, as this HH is not conferred CE or MCE.</p> <p>Additional Data Collection pages to review for completion: Income, Expenses, Medical Condition, Medicare, Other Program Assistance, etc.</p> <p>Additional <b>Quick Guides</b> available in LMS <b>and Job Aids</b> available in CalSAWS:</p> <p><b>Property Management</b> <b>Income Categories and Types in the System</b> <b>Expense Management</b></p>	 <p>The screenshot displays the CalSAWS Eligibility page for a specific case. The left sidebar contains a navigation menu with categories like 'Non Financial' and 'Financial'. The main content area is titled 'CalFresh EDBC Summary' and includes a table for EDBC runs. Below this, the 'Regular Program Configuration' section shows the 'Program Status' as 'Discontinued' with a reason of 'Over Resources'. A table below lists individuals (Isabel 18F and Grace 63F) with their roles and status reasons. The 'Property Eligibility' section at the bottom shows a 'Regular' property limit of \$3,750.00, and the 'Gross Income Eligibility' section shows a 'Regular' unearned income limit of \$0.00. A yellow circle with the number '1' is placed over the 'Gross Income Eligibility' section.</p>

Steps to Clear Alert		Screenshot
27	<p>In this example, the CalWORKs program is discontinued for: <b>Over Income</b></p> <p>1. Navigate to the <b>Income</b> link to review and update any Income information for prior to re-running EDBC.</p> <p>Ensure income is correctly entered on the Income Detail page.</p> <p>Ensure Begin and End Dates are correct for each income record.</p> <p>Additional Data Collection pages to review for completion: Other Program Assistance, Expenses, Medicare, etc.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Income Categories and Types in the System Verifications - Manage</b></p>	

Steps to Clear Alert		Screenshot
28	<p>In this example, we are receiving a validation message indicating there is <b>no Absent/Unmarried Parent</b> record for this two-parent CalWORKs AU.</p> <p>1. Click <b>Run EDBC</b> to navigate to the EDBC Results page.</p>	

### Steps to Clear Alert

29

On the **CalWORKs EDBC Summary**, results show the two-parent CW AU has been discontinued for: **No Elig. Child** (No Eligible Child) - **No Deprivation**. In this example, we have received the Soft Validation message indicating there was no Absent/Unmarried Parent record, so we will begin our review there.

1. Click the **Absent Parent** page to update Data Collection as prompted by the soft validation error message.

Once updated, additional Data Collection pages to review for completion and accuracy, as this is a two-parent AU requiring a Deprivation determination:

Unemployment Deprivation, Medical Condition, Potentially Available Income, Household Status, Relationship, Individual Demographics (deceased parent record if previously in the home), etc....

The following Job Aids are available to assist in CalSAWS:

**Child Support - Support Questionnaire**

**Unemployment Deprivation Detail - PWE Worksheet and Detail Page**

**Employment Detail - Add or Edit**

**Medical Condition Detail – Disabled or SP-DDSD**

### Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesOCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:  
 Go

Person Search

Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Employment

Striker

Unempl. Depriv.

Work Regist.

Living Arrgmt

Homeless Assistance

Potentially Avail. Income

Military/Veterans

Absent Parents

Medical Condition

Sponsorship

Specialized Supportive Services

SFIS

Institutional Information

CalWORKs EDBC Summary

\*- Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/19/2022	Not Accepted	

EDBC Information

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

Program Status: Discontinued

Program Status Reason: No Elig. Child

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Discontinued	No Elig. Child
		MEM		Discontinued	Mandatory/Optional Rules
Asadullah 10M		MEM		Discontinued	No Deprivation
Tasalla 7F		MEM		Discontinued	No Deprivation
Aminullah 5M		MEM		Discontinued	No Deprivation

Override Program Configuration

Reporting Configuration

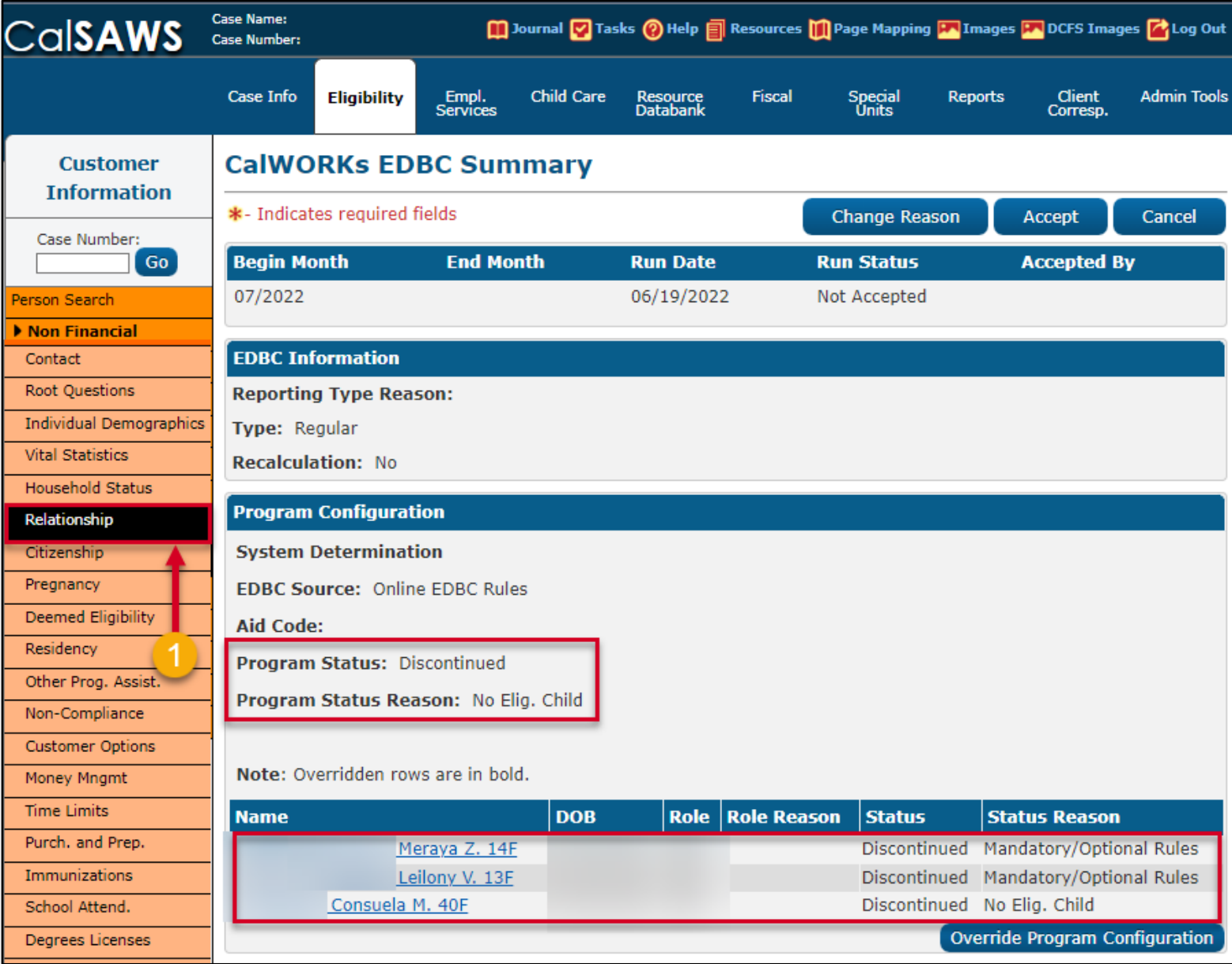
Work Eligibility

Aid Payment

Budget Amount

Penalties	\$	0.00
Potential Benefit	\$	0.00
Previous Potential Benefit	\$	0.00
Overpayment Adjustment Amount	\$	0.00
Authorized Amount	\$	0.00



Steps to Clear Alert		Screenshot
30	<p>In this example, the CalWORKs program is discontinued for: <b>No Elig. Child</b> (No Eligible Child) – <b>Mandatory/Optional Rules</b></p> <p>1. Click on the <b>Relationship</b> link to review data collection page prior to re-running EDBC.</p> <p>Confirm <b>Relationships</b> are correctly established and verified.</p> <p>Verify all AU/HH Members have an <b>In the Home</b> record is effective as of the Application Date/BDA or earlier.</p> <p>Confirm all required <b>AU/HH Members</b> persons have been added to the Program.</p> <p>Additional Data Collection pages to review for No Eligible Child: Individual Demographics, Household Status, Citizenship, School Attendance, Immunizations, Other Program Assistance, Absent Parent, Unemployed Parent, Vital Statistics, Citizenship, Verifications, etc.</p> <p>The following Job Aids are available to assist in CalSAWS:</p> <p><b>Relationship Information – Add</b> <b>School Attendance Information-Add and Edit</b> <b>Medical Condition Detail - Fry v Saenz</b> <b>Welfare to Work Exemptions – Adding and Editing</b> <b>Sanction Process – Curing a Sanction with a Cure</b> <b>Sanction Activity</b></p>	 <p>The screenshot displays the CalSAWS interface. On the left, a sidebar menu under 'Customer Information' has the 'Relationship' link highlighted with a red box and a red arrow pointing to it, labeled with a yellow circle containing the number '1'. The main content area is titled 'CalWORKs EDBC Summary'. It includes a table with columns: Begin Month, End Month, Run Date, Run Status, and Accepted By. Below this is the 'EDBC Information' section, followed by 'Program Configuration' which shows 'System Determination' and 'EDBC Source: Online EDBC Rules'. The 'Aid Code' section shows 'Program Status: Discontinued' and 'Program Status Reason: No Elig. Child', both highlighted with a red box. At the bottom, a table lists individuals with columns: Name, DOB, Role, Role Reason, Status, and Status Reason. Three individuals are listed: Meraya Z. 14F, Leilony V. 13F, and Consuela M. 40F, all with a status of 'Discontinued' and reasons of 'Mandatory/Optional Rules' or 'No Elig. Child'. A red box highlights this table. The 'Override Program Configuration' button is at the bottom right.</p>

Steps to Clear Alert

31

On the **Relationship List** page, there is no **Parental Control** indicated within the record for the Primary Applicant/Parent.

1. Click **Edit** to access the **Relationship Detail** page and update the information the parental control.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:  
 Go

Person Search

Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Relationship List

Number of relationships remaining to be created: 0Continue

Search Results SummaryResults 1 - 6 of 6

Display by Relationship:From:To:ViewAdd

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
Leilony 13F	Child	Consuela 40F	No	2010		EditView History
Meraya 14F	Sibling (full or half)	Leilony 13F	No	2009		EditView History
Meraya 14F	Child	Consuela 40F	No	2010	1	EditView History
Reina 17F	Child	Consuela 40F	No	2010		EditView History
	Sibling (full or half)	Meraya 14F	No	2009		EditView History
	Sibling (full or half)	Leilony 13F	No	2009		EditView History



Steps to Clear Alert		Screenshot
32	<p>On the <b>Relationship Detail</b> page, Indicate the <b>New Change Reason</b> and <b>New Reported Date</b> as applicable before updating the record.</p> <ol style="list-style-type: none"><li>1. Confirm the Parent/Child Relationship is indicated between the <b>First Individual</b> and <b>Second Individual</b>.</li><li>2. Select the checkbox <b>Has Parental Control</b> and/or <b>Responsible Relative</b>, as applicable.</li><li>3. Click <b>Save and Return</b> to update the record.</li></ol> <p>Quick Guide Change Reason is available in the LMS for additional information</p>	<p>The screenshot displays the CalSAWS interface for the 'Relationship Detail' page. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The main menu on the left lists various sections: Customer Information, Non Financial, Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship (highlighted), Citizenship, Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, Customer Options, and Money Mngmt. The 'Relationship Detail' form contains several sections: 'Change Reason' with a dropdown for 'New Change Reason' and a date field for 'New Reported Date'; 'First Individual' and 'Second Individual' fields with a 'Relationship' dropdown; checkboxes for 'Responsible Relative' and 'Has Parental Control'; 'Begin Date' and 'End Date' fields; and a 'Verified' dropdown. Numbered callouts are present: '1' points to the 'First Individual' and 'Relationship' fields; '2' points to the 'Has Parental Control' checkbox; and '3' points to the 'Save and Return' button at the bottom right.</p>

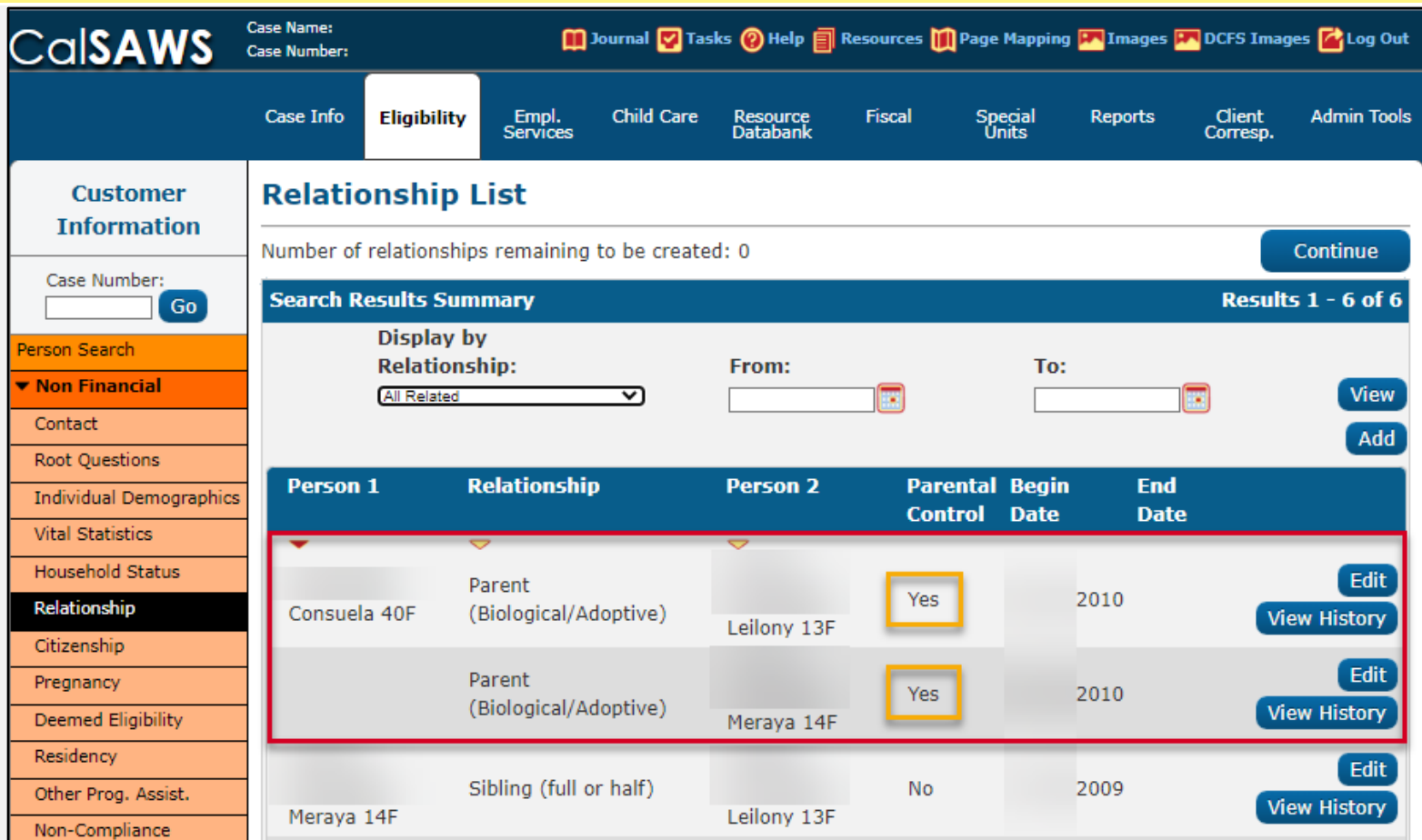
## Steps to Clear Alert

33

On the **Relationship** List page, confirm that the **Parental Control** indicator is marked **Yes** to reflect the Primary Applicant/Payee with Parental Control is indicated on this page.

Now that the case updates have been made, navigate back to **Run EDBC** page to complete the eligibility determination on the program.

## 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**

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

**Relationship**

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

**Relationship List**

Number of relationships remaining to be created: 0 [Continue](#)

**Search Results Summary** Results 1 - 6 of 6

Display by Relationship: **From:** **To:**

All Related View Add

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
Consuela 40F	Parent (Biological/Adoptive)	Leilony 13F	Yes	2010		<a href="#">Edit</a> <a href="#">View History</a>
	Parent (Biological/Adoptive)	Meraya 14F	Yes	2010		<a href="#">Edit</a> <a href="#">View History</a>
Meraya 14F	Sibling (full or half)	Leilony 13F	No	2009		<a href="#">Edit</a> <a href="#">View History</a>

### Steps to Clear Alert

33 Once back on **CalWORKs EDBC Summary** page, note that the CW program is now Active, and all AU members are currently aided.

### Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient 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

CalWORKs EDBC Summary

\* - Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/19/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin

Month: 05/2022

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 30 - CW-All Other Families (Fed)

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
<a href="#">Meraya Z. 14F</a>		MEM		Active	
<a href="#">Leilony V. 13F</a>		MEM		Active	
<a href="#">Consuela M. 40F</a>		MEM		Active	

Override Program Configuration

▼ Reporting Configuration

Name	Role	Adult/Child	Claiming	Deprivation
<a href="#">Meraya Z. 14F</a>	MEM	Child	Federal	Absence
<a href="#">Leilony V. 13F</a>	MEM	Child	Federal	Absence
<a href="#">Consuela M. 40F</a>	MEM	Adult	Federal	

## Screenshot

The user can access the immunization information by clicking on the verification hyperlink labeled **Immunization**.

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 Numbers:

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

Verification List

\*- Indicates required fields

Status: \*

Name:

From:

To:

Continue

View

Pending

Search Results Summary

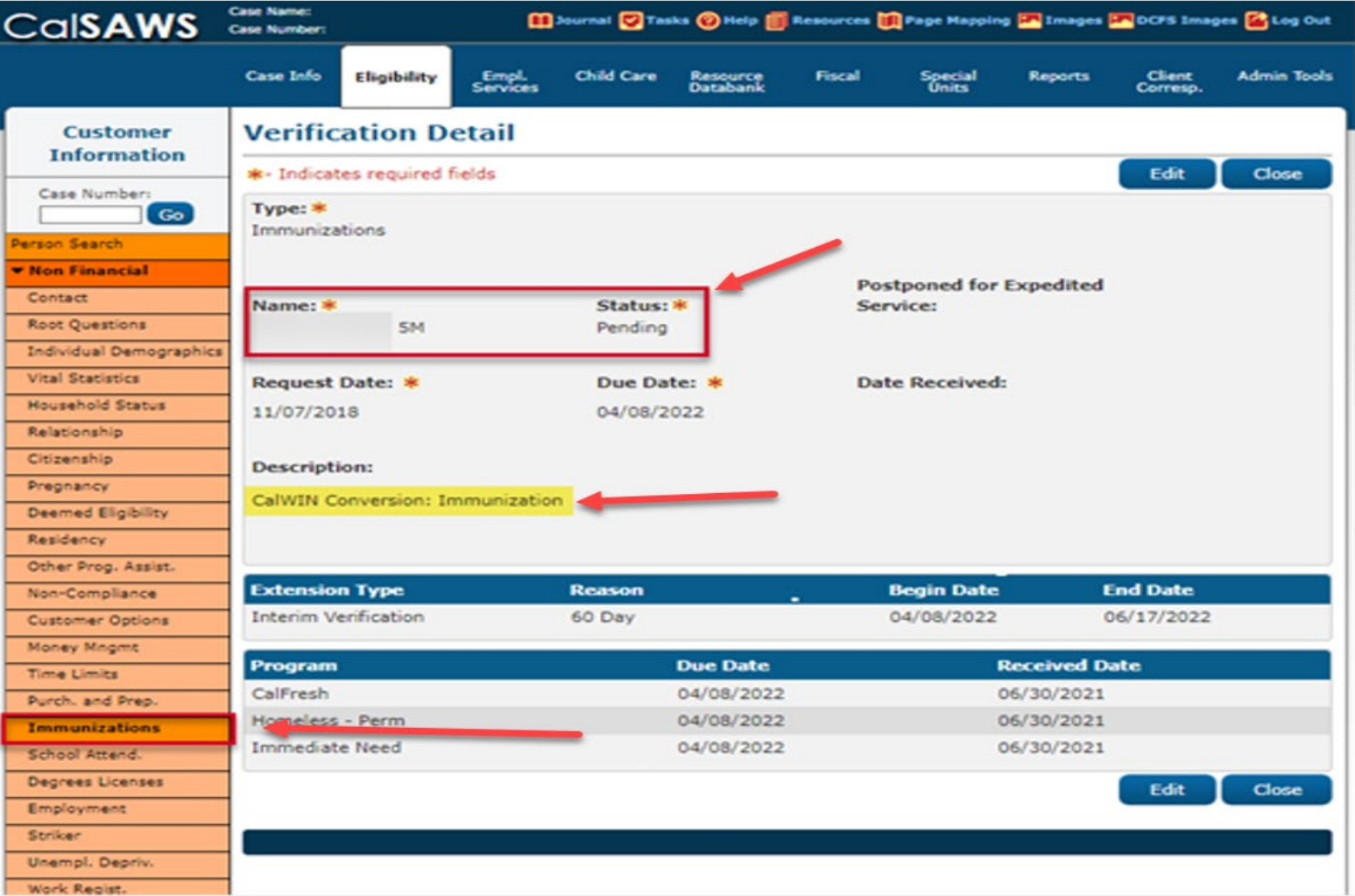
Results 1 - 15 of 15

Add

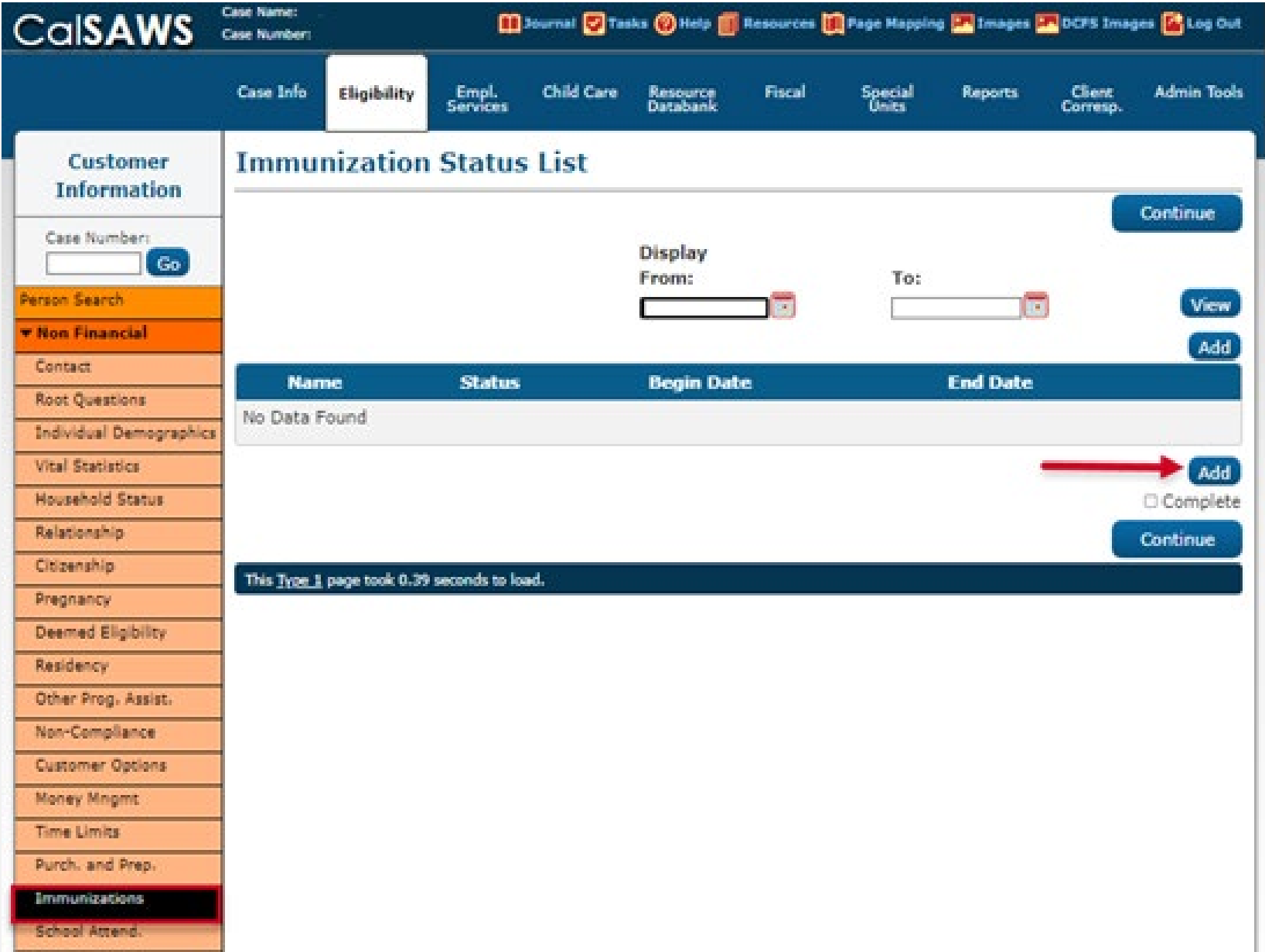
Type	Name	Request Date	Due Date	Extension Date	Postponed ES	
<input type="checkbox"/> <a href="#">Pregnancy</a>	35F	01/11/06	01/23/06			<input type="button" value="Postpone"/> <input type="button" value="Edit"/> <input type="button" value="Verify"/> <input type="button" value="View History"/>
<input type="checkbox"/> <a href="#">Vital Statistics Identity</a>	62F	03/14/06	03/24/06			<input type="button" value="Postpone"/> <input type="button" value="Edit"/> <input type="button" value="Verify"/> <input type="button" value="View History"/>
<input type="checkbox"/> <a href="#">Vital Statistics US Citizenship</a>	62F	03/14/06	03/24/06			<input type="button" value="Postpone"/> <input type="button" value="Edit"/> <input type="button" value="Verify"/> <input type="button" value="View History"/>
<input type="checkbox"/> <a href="#">Country of Birth</a>	62F	03/14/06	03/24/06			<input type="button" value="Postpone"/> <input type="button" value="Edit"/> <input type="button" value="Verify"/> <input type="button" value="View History"/>
<input type="checkbox"/> <a href="#">Immunizations</a>	62F	11/07/18	04/08/22	06/17/2022		<input type="button" value="Postpone"/> <input type="button" value="Edit"/> <input type="button" value="Verify"/> <input type="button" value="View History"/>

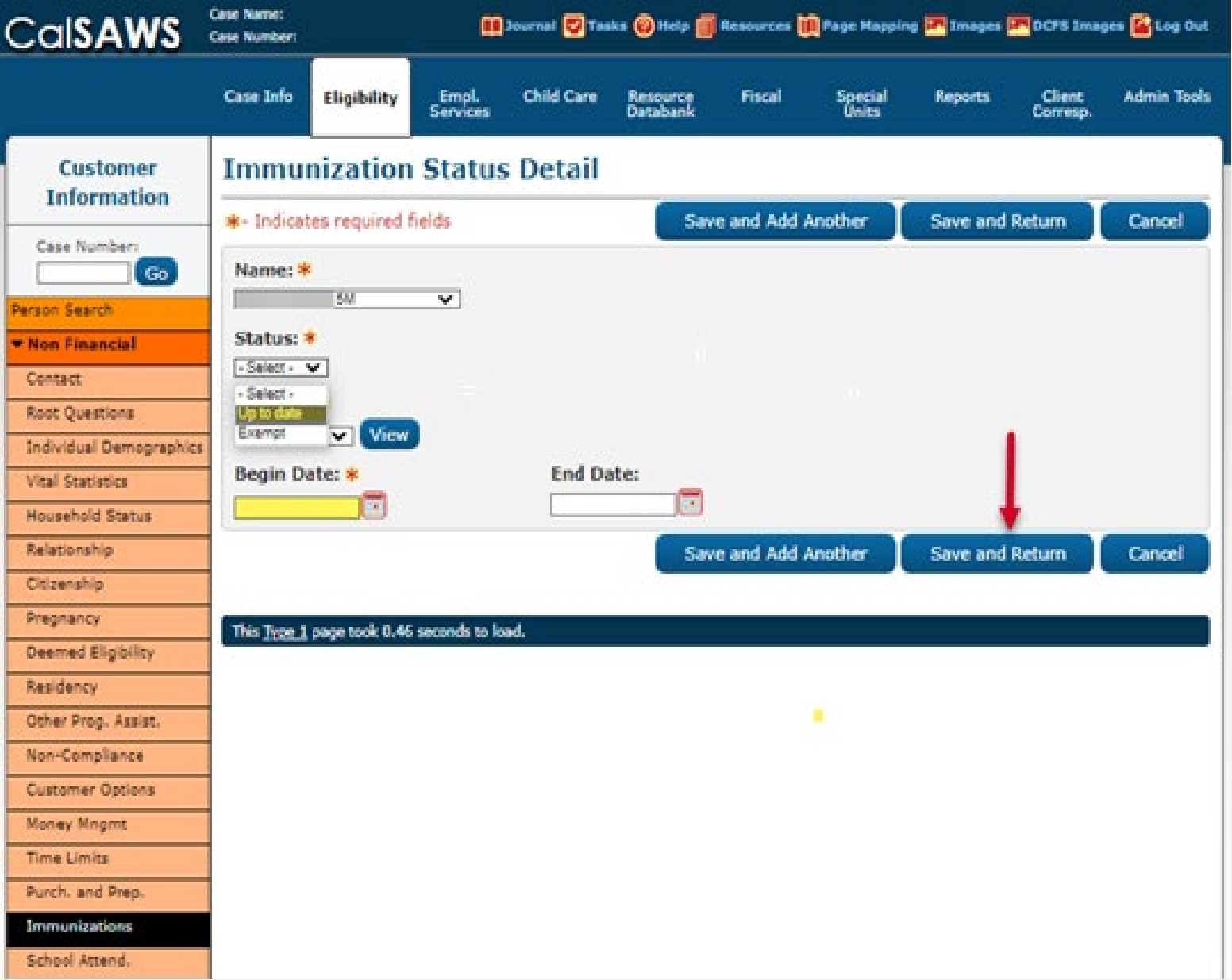
Generate Form

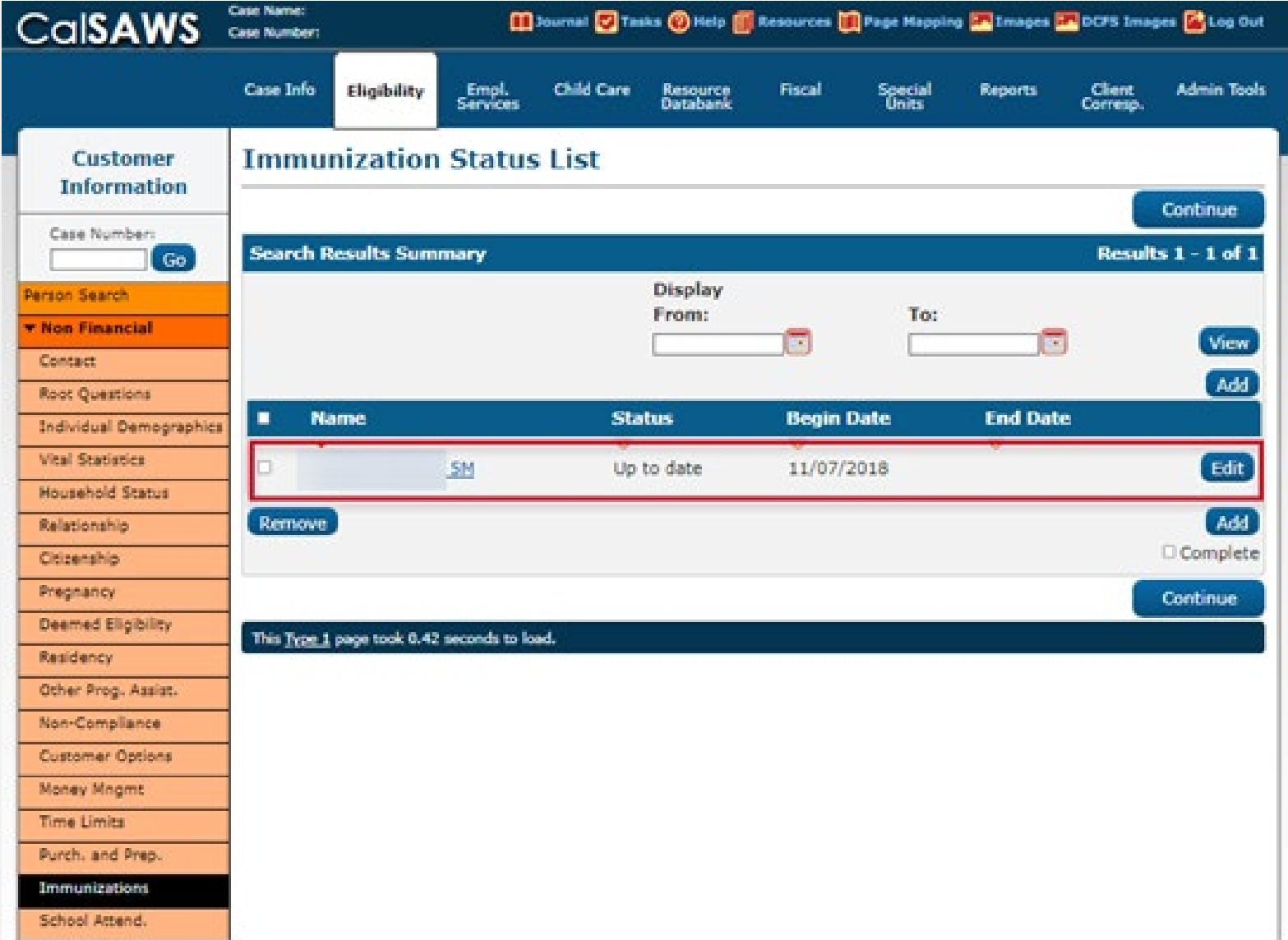
Add

Steps to Clear Alert		Screenshot
35	<p>The user will be directed to the Verification Detail page. The user will note that the verification has a pending status. The Description will read <b>CalWIN Conversation Immunization</b>, an indication to the user that the immunization record previously had a <b>Good Cause</b> entry in CalWIN.</p> <p>The User will need to click on the <b>Immunization</b> tab located in the orange navigation bar to the left of the screen. Located under the <b>Non-Financial</b> column.</p>	



Steps to Clear Alert		Screenshot
36	<p>The user will be directed to the Immunization Status List.</p> <p>Any existing Immunization records that converted over from CalWIN will be visible on this page.</p> <p>The user will need to create an Immunization record for the child in order to update the status.</p> <p>To add an Immunization record, the user will click the <b>Add</b> button located at the lower right side of the page.</p>	

Steps to Clear Alert		Screenshot
37	<p>The user will be directed to the <b>Immunization Status Detail</b>, where the user will be required to:</p> <ol style="list-style-type: none"><li>1. Select the <b>Child's</b> name from the drop-down menu.</li><li>2. Select the <b>Status</b> for the immunization record.<ol style="list-style-type: none"><li>a. <b>Up to date:</b> This will be the primary option to indicate the child has their immunization up to date, or if the child is granted what was previously known as “<b>Good Cause</b>” in CalWIN.</li><li>b. <b>Exempt:</b> This status will be selected if the child meets one of the exemptions to immunization set forth by program rules and regulations.</li></ol></li><li>3. The user will enter a <b>Begin Date</b></li><li>4. Click <b>Save and Return</b></li></ol>	 <p>The screenshot shows the CalSAWS interface. On the left is a sidebar menu with categories like Customer Information, Person Search, Non Financial, and various data entry sections. The main area is titled 'Immunization Status Detail'. It contains a form with the following fields: 'Name' (a dropdown menu), 'Status' (a dropdown menu with 'Up to date' selected), 'Begin Date' (a date picker), and 'End Date' (a date picker). There are two sets of buttons: 'Save and Add Another', 'Save and Return', and 'Cancel' at the top and bottom of the form. A red arrow points to the 'Save and Return' button at the bottom. A status bar at the bottom of the page indicates 'This page took 0.46 seconds to load.'</p>

Steps to Clear Alert		Screenshot
38	The user will be navigated back to the Immunization Status List, where the newly created Immunization record will display.	



Steps to Clear Alert

- 39
- In this example, the CalWORKs program is discontinued for: **No Appl – Req Person**

Users must include all mandatory household members in the CalFresh/CalWORKs program after conversion.

Verify all AU/HH Members have a correct **Household Status** on the bottom of the Case Summary Page

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient 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

CalWORKs EDBC Summary

\*- Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
10/2022		08/31/2022	Not Accepted	

EDBC Information

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

Program Status: Discontinued

Program Status Reason: No Appl - Req Person

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Person 1		MEM		Discontinued	No Appl - Req Person
Person 2		MEM		Discontinued	No Appl - Req Person

Override Program Configuration

► Reporting Configuration

► Work Eligibility

Steps to Clear Alert

- 1. Place the cursor over **Eligibility** on the Global navigation bar and select Case Summary from the Local navigator.
- 2. Under the impacted program block, click the **View Details** button to navigate to the Program Detail page.
- 3. Click the **Edit** button in the upper righthand corner of the page to access the Program Detail page in Edit mode.
- 4. Under the Program Persons block, click the **Add** or **Reapply** button and associate the mandatory household member(s) to the program.

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

Case Summary

Case Number: 

Go

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

CalWORKs Detail

\*- Indicates required fields

View History

Save and Return

Cancel

Date: \*

View Date

Program Information

Status: \*

Active

Status Reason:

Source: \*

Self-Service Portal

Application Date: \*

Edit

RE Begin Month:

07/2021

RE Due Month: \*

Reporting Type:

Semi-Annual Reporting

SAR Due Month:

12/2021

Automatically Reassign When Activated:

No

Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees
	Primary Applicant/Recipient	09/01/2021		<div>Edit</div>
	Payee	05/26/2021		<div>Edit</div>
<div>Add</div>				

Program Persons

Name	Role	Role Reason	Status	Status Reason
Person 1	MEM		Active	<div>Edit</div>
Person 2	MEM		Active	<div>Edit</div>
Person 3	MEM		Denied	
<div>Rescind</div> <div>Reapply</div>				

Steps to Clear Alert

Now that the case updates have been made, navigate back to **Run EDBC** page to complete the eligibility determination on the program.

Confirm all required **AU/HH Members** persons have been added to the Program.

The following Job Aids are available to assist in CalSAWS:

**JA Add a Person to an Existing Case and Existing Program**

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number:  
  
Go

Person SearchEBT Account SearchApplication RegistrationCase SummaryContactAuthorized RepresentativeApplication QuestionsNegative ActionNew ProgramNew PersonHide PersonEBT Account ListIssuance HistoryAuxiliary Authorization ListExpungement History

New / Reapplication Detail

\*- Indicates required fields

View Date:  
10/01/2022

Program Type:  
CalWORKs

Primary: \*

Application Date: \*

Requested BDA: \*

Source:  
Self-Service Portal

Cash-based Medi-Cal BDA:

<input checked="" type="checkbox"/>	Name *	DOB	Role	Role Reason	Status	Status Reason
<input type="checkbox"/>	Person 2		MEM		Active	
<input checked="" type="checkbox"/>	Person 3		MEM		Denied	
<input type="checkbox"/>	Person 1		MEM		Active	

Save and Return

Cancel

This Type 1 page took 0.41 seconds to load.

Steps to Clear Alert		Screenshot
40	<p>Once all data collection pages have been updated, the User can run EDBC, review and accept program determinations, and save the new EDBC results.</p> <p>Review and send any applicable Notices of Action. If the NOA is not reviewed it will go out due to an overnight batch process. Journal the action taken according to county policy.</p> <p>Navigate back to the <b>Case Summary</b> page.</p> <p>The case review is complete!</p>	 <p>The screenshot shows the CalSAWS interface. At the top, there's a navigation bar with the CalSAWS logo and links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a secondary navigation bar with tabs for Case Info, Eligibility, 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 a sidebar with links like Case Number, Person Search, EBT Account Search, Application Registration, Case Summary (highlighted), Contact, Authorized Representative, Application Questions, and Negative Action. The main panel shows fields for Case Name and County, a section for Companion Cases with Case Number and Case Name, and a Display section with a date (07/01/2022) and a View button. A large red text overlay reads 'Yellow Banner cleared!'.</p>