



Program Person Status Mismatch

Priority Level: 1

Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care, GA/GR, Medi-Cal, Nutrition Benefits, 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 is run during conversion cutover in CalSAWS, the Program Person Status Mismatch does not match what was determined in the CalWIN System. Person Statuses are mismatched like Active or Denied or Discontinued between the last saved CalWIN EDBC results and the converted data in CalSAWS.

Run EDBC in CalSAWS to find the Person Status mismatches and compare to the last saved and converted CalWIN EDBC. Based on the differences, Users will need to verify the results, update the data collection records, if applicable, take action based on county policy and authorize the EDBC results.

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

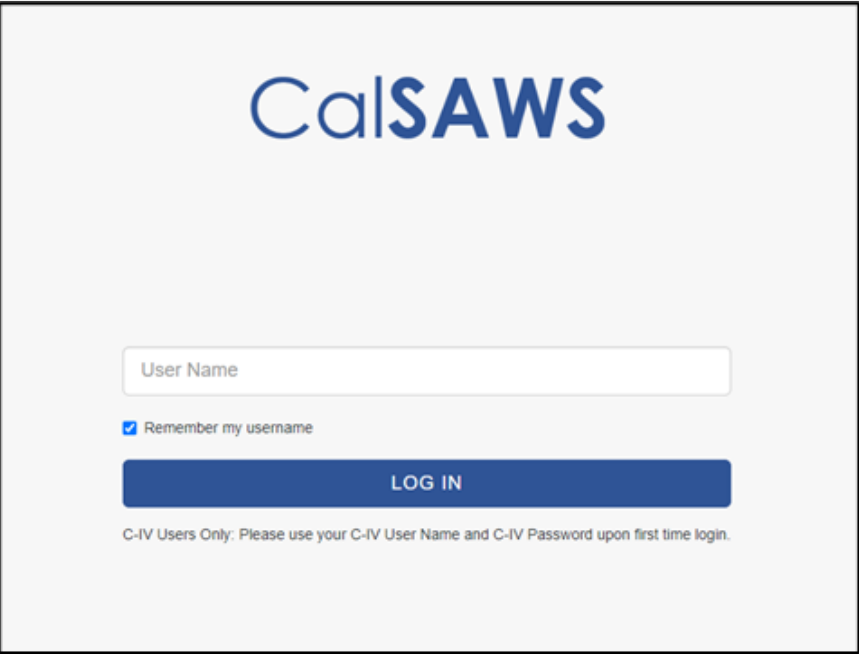

COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY	SSA_INCOMESSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalWORKs	Program Person Status Mismatch	06/30/2022		1	

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.



Example

Program Person Status Mismatch

Steps To Clear Alert		Screenshot
1	Log in to CalSAWS by entering your Username and Password	
2	<p>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 displays the CalSAWS Case Summary page. 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 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 search bar for Case Name and County. Below the search bar is a section for 'Companion Cases' with a table for Case Number and Case Name, and an 'Add' button. At the bottom of the page, there is a yellow banner with the following 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 to this banner.



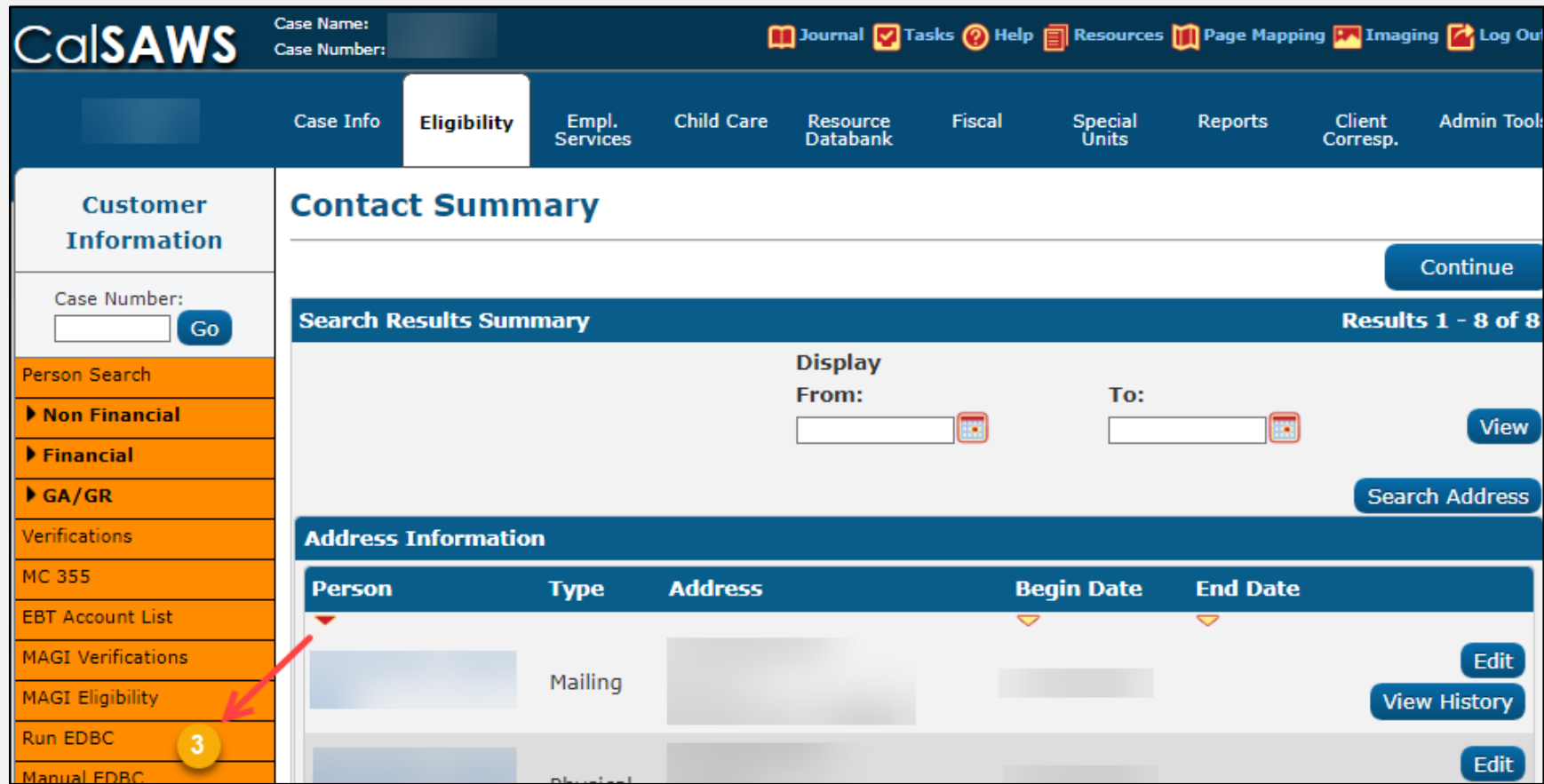
Steps To Clear Alert

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

Screenshot



- From the Contact Summary page:
3. Click on **Run EDBC** 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.

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. Follow your county policy.

★ **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

5 Run EDBC in CalSAWS to find the Person Status mismatches compared with the last CalWIN run Conversion EDBC.

The last saved CalWORKs EDBC results were for **02/2022**. In this example, Users will compare the **07/2022** future month CalWORKs EDBC result against the **02/2022** EDBC result.

Users should review EDBC results to ensure accuracy before accepting results.

Screenshot

The screenshot shows the CalSAWS interface with the 'Eligibility' tab selected. The 'EDBC List' section is active, displaying a table of results. The table has the following columns: Begin Month, End Month, Program, Type, Run Status, Auth Amount, Date Run, and EDBC Source. The data rows are as follows:

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
06/2011		Immediate Need	Regular	Accepted - Saved	Fail	06/20/2011	Conversion
02/2022		CalWORKs	Regular	Accepted - Saved	1,116.00	01/04/2022	Conversion
02/2022		CalFresh	Regular	Accepted - Saved	826.00	01/04/2022	Conversion
02/2022		Medi-Cal	Regular	Accepted - Saved	Details	01/04/2022	Conversion
07/2022		CalWORKs	Regular	Not Accepted	1,116.00	06/08/2022	Online EDBC Rules
07/2022		CalFresh	Regular	Not Accepted	900.00	06/08/2022	Online EDBC Rules
07/2022		Medi-Cal	Regular	Not Accepted	Details	06/08/2022	Online EDBC Rules



Steps To Clear Alert

6

When comparing the last saved CalWORKs EDBC Summary results, there is an EDBC Program Person Status Mismatch as **Kaden, 18M** person status and status reason changed from **Active** in 02/2022, to showing **Discontinued** with a status reason of having reached **Age 18 Requirements**.



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 county policy when Troubleshooting EDBC Results.

Additional Job Aids are available in CalSAWS in the **Help Icon** located in the Utilities navigator:

JA EDBC – Troubleshooting Incorrect Results

JA EDBC - Online Definitions and Troubleshooting

Continue to review and authorize EDBC results for any CalFresh and Medi-Cal programs.

Screenshot

The screenshot displays the CalWORKs EDBC Summary interface. It includes a navigation menu at the top with options like Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is divided into sections: Customer Information, EDBC Information, and Program Configuration. A table at the bottom lists individuals with columns for Name, DOB, Role, Role Reason, Status, and Status Reason. In the left screenshot, the row for 'Kaden 18M' is highlighted in red, and red arrows point to the 'Status' (Active) and 'Status Reason' (Doesn't Meet Program Req.) columns. In the right screenshot, the status for 'Kaden 18M' has changed to 'Discontinued' and the status reason to 'Age 18 Requirements', with yellow arrows pointing to these updated values.



Steps To Clear Alert

7 When comparing the last saved CalFresh EDBC Summary results from **2/2022** against the CalFresh EDBC Summary results for **07/2022**, the entire household status corresponds with the CalWORKs EDBC Summary results.



Remember to check for any missing verifications, reports received, or images awaiting review for potential case changes prior to running EDBC and authorizing future benefit EDBC results for both CalFresh (possible TCF) and Medi-Cal programs. Accept EDBC results if results are as expected.

The **Medi-Cal EDBC Summary** page will display the following:

- Benefit Month and Program Status
- EDBC Information
- Program Configuration
- Reporting Configuration
- Medi-Cal Summary

The eligibility for this household should reflect the accurate eligibility for the benefit program (Medi-Cal). The EDBC results can be saved by clicking the **Accept** button located on the top right or bottom right of the summary. Once the Medi-Cal program results have been saved, this will redirect Users to the **EDBC List** page.

Screenshot

The screenshots show the CalFresh EDBC Summary interface. The left screenshot is for the month of 02/2022, showing a table of household members with the following data:

Name	DOB	Role	Role Reason	Status	Status Reason
[Redacted]	[Redacted]	MEM		Active	
[Redacted]	[Redacted]	MEM		Discontinued	Separate P&P
[Redacted]	[Redacted]	MEM		Active	
[Redacted]	[Redacted]	MEM		Active	
[Redacted]	[Redacted]	MEM		Active	
[Redacted]	[Redacted]	MEM		Active	

The right screenshot is for the month of 07/2022, showing a table of household members with the following data:

Name	DOB	Role	Role Reason	Status	Status Reason
[Redacted]	[Redacted]	MEM		Active	
[Redacted]	[Redacted]	MEM		Active	
[Redacted]	[Redacted]	MEM		Active	
[Redacted]	[Redacted]	MEM		Active	
[Redacted]	[Redacted]	MEM		Active	

The screenshots show the Medi-Cal EDBC Summary interface. The left screenshot is for the month of 02/2022, showing a table of household members with the following data:

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
Kevin 22M	[Redacted]	MEM		Active		

The right screenshot is for the month of 07/2022, showing a table of household members with the following data:

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
Kevin 48M	[Redacted]	UP	Gets CalWORKs	Active		
[Redacted]	[Redacted]	MEM		Active		
[Redacted]	[Redacted]	UP	Gets CalWORKs	Active		
[Redacted]	[Redacted]	UP	Gets CalWORKs	Active		
[Redacted]	[Redacted]	MEM		Active		
[Redacted]	[Redacted]	UP	Gets CalWORKs	Active		



Steps To Clear Alert

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The **EDBC List** page will display the following:

- A message to inform the user that a Notice of Action was created.
- A **Preview NOA** button, which allows the user to view the notice prior to distribution.
- A **Save and Continue** button, which allows the user to save all the actions taken.

Review the NOA's for accuracy:

1. Click the **Save and Continue** button. This will direct the user to the **Distributed Documents Search** page, where the NOA will be in a **Pending Review** status.

Screenshot

The screenshot shows the CalSAWS interface with the 'EDDB List' page. A message at the top states: 'Medi-Cal NOA run is complete - NOA generated'. Below this is a search filter section with fields for Program, Type Reason, Run Status, From, and To. A table titled 'Search Results Summary' displays the following data:

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDDB Source
		Homeless - Temp	Regular	Accepted - Saved		08/03/2020	Conversion
		CalWORKs	Regular	Accepted - Not Saved		05/11/2022	Online EDDB Rules
		CalFresh	Regular	Accepted - Not Saved		05/11/2022	Online EDDB Rules
		Medi-Cal	Regular	Accepted - Saved		12/08/2021	Online EDDB Rules
		Medi-Cal	Regular	Accepted - Not Saved		05/11/2022	Online EDDB Rules

Red annotations in the screenshot include a box around the success message, a box around the 'Preview NOAs' and 'Save and Continue' buttons at the top, and a red arrow pointing to the 'Save and Continue' button at the bottom. A red arrow also points to the 'Save and Continue' button in the bottom right corner of the table area.



Steps To Clear Alert

Screenshot

9

In the **Distributed Documents** Search:

1. Click on the hyperlink for the NOA with the **"Pending Review"** status to view the NOA and select a method of distribution. If the NOA is not reviewed it will go out due to an overnight batch process.

The screenshot displays the CalSAWS 'Distributed Documents Search' page. On the left is a 'Customer Information' sidebar with a 'Case Number' field and a 'Go' button. Below this are navigation links for 'Person Search', 'Non Financial', 'Financial', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC', and 'Manual EDBC'. The main content area is titled 'Distributed Documents Search' and includes a 'Refine Your Search' link. Below this is a 'Search Results Summary' section showing 'Results 1 - 1'. A table lists the search results:

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
05/11/2022 7:54 AM	NOA - MC - MIXED HA HT - MAGI Approval and Discontinuance		Medi-Cal	Pending Review	Detail

Red arrows point to the document name and the 'Pending Review' status. A yellow circle with the number '1' is placed over the document name.

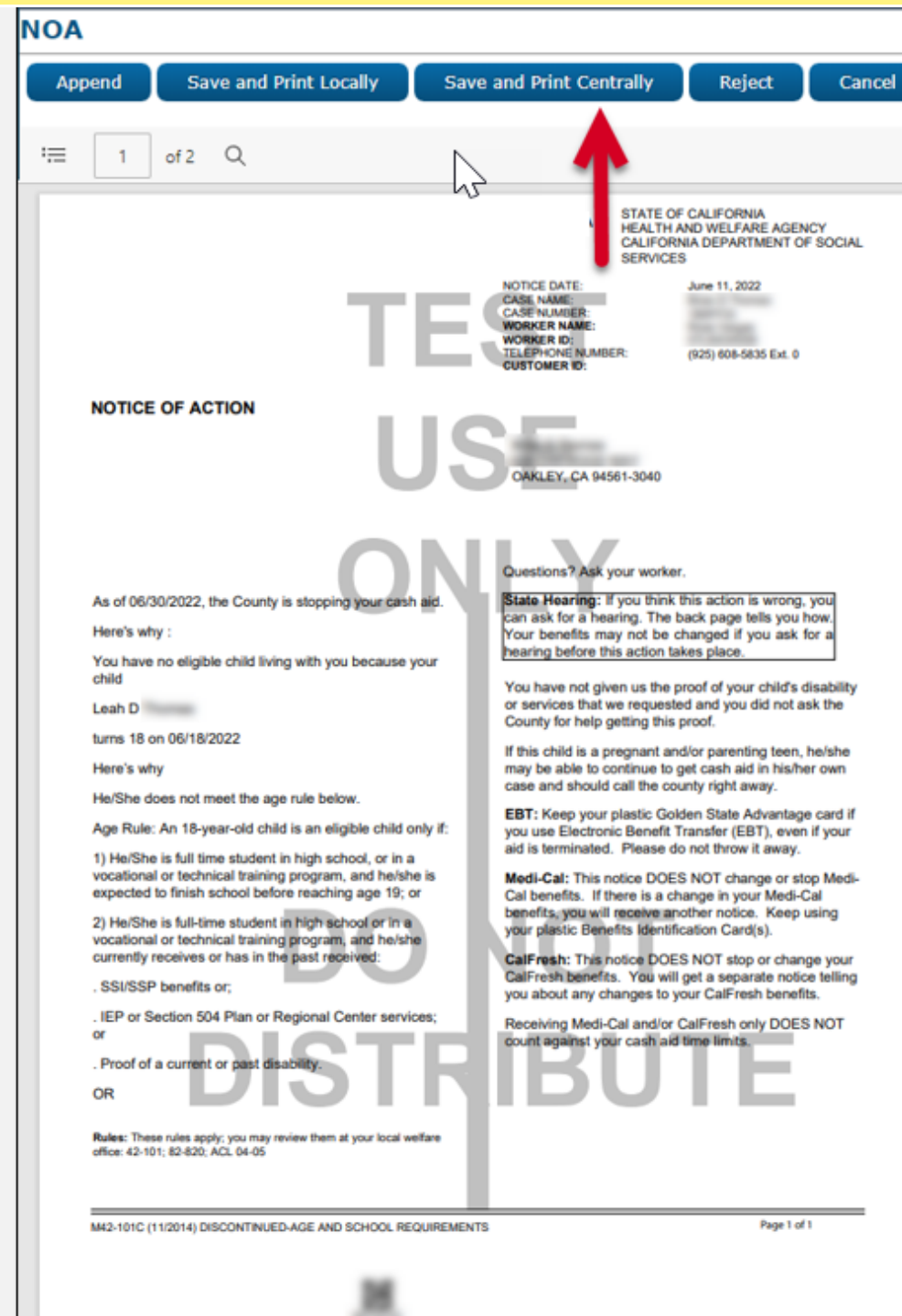


Steps To Clear Alert

- 10 Users will be directed to a PDF preview of the NOA. Users will have the following options:
- **Append:** User can make limited edits to NOA if necessary
 - **Save and Print Locally:** User will save NOA to the case and will need to manually print the NOA for distribution.
 - **Save and Print Centrally:** User will save the NOA to the case and the NOA will be sent out by central printing during nightly batch.
 - **Reject:** User will reject the NOA, the NOA will still display in the case as a rejected status
 - **Cancel:** User can cancel, this will leave the NOA in a “pending review” status.

Select the appropriate status for the NOA. This will update the status in the **Distributed Document Search** page.

Screenshot





Steps To Clear Alert

- 13 Once the Notices of Actions are reviewed, accepted and saved, journal the action taken according to county policy.
- Navigate back to the **Case Summary** page.
- The Yellow Banner will no longer appear on the case.
- The case review is complete!

Screenshot

The screenshot shows the CalSAWS interface. At the top, there is a navigation bar with the CalSAWS logo and various utility icons (Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, 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 a search bar for Case Name and County. Below the search bar is a 'Companion Cases' section with a table for Case Number and Case Name, and an 'Add' button. A prominent red banner message reads 'Yellow Banner cleared!'. At the bottom, there is a 'Display:' section with a date selector (07/01/2022) and a 'View' button, followed by a 'Case Flags' section.