



CalWIN ISS

Implementation Support Services

Case Review Report and Guide (CRG)

Go-Live Packet (GLP) – Appendix G06 –
Guide #06: Update Missing Pay Codes

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1 INTRODUCTION

Missing pay codes on Payment Amount used by screen will required to be cleaned up by users.

2 BACKGROUND

User will see missing mandatory entry in the *Pay Code* field on the **Payment Amount Used By EDBC** page.

The screenshot displays the 'Payment Amount Used By EDBC' page. On the left is a sidebar with 'Customer Information' and a list of categories including '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 Mgmt', 'Time Limits', and 'Birth and Pren.'. The main content area has a title 'Payment Amount Used By EDBC' and a red asterisk indicating required fields. It contains four fields: 'Pay Code' (required), 'Amount' (44.12), 'Begin Month' (09/2008), and 'End Month' (09/2008). Each field has an 'Edit' button. Below the fields, it says 'Last Updated On 10/14/2021 12:00:00 AM By: 07'. At the bottom, a status bar indicates 'This Type.1 page took 0.29 seconds to load.'

Figure 2-1 – Payment Amount Used By EDBC Page

3 IMPACT ANALYSIS

If the pay code is not populated, the source of historical issuances cannot be tracked if they were supposed to be for a certain pay type. For ongoing money management records pay codes would be required; or else payments would get created without pay code under regular funding.

4 CLEAN-UP INSTRUCTIONS

Pay codes can be edited from the front-end pages.

If the pay code does not need to be edited, then no action is required.

If pay code needs to be updated

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Money Mgmt* link in the **Task** navigation bar.
3. On the **Money Management List** page, click the *Edit* button for the record you need.
4. On the **Money Management Detail** page under the Payment Amount used by EBDC, click the *Edit* button for the record you need.
5. On the **Payment Amount used by EBDC** page, you can edit the *Pay Code* field to update the appropriate pay code type as applicable.
6. Click the *Save and Return* button.

Note: For ongoing money management entries, the pay code will be required.

5 ADDITIONAL INFORMATION

Not applicable.