Program Person Role Mismatch

Priority Level: 2

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 is run in CalSAWS, the Program Person Role does not match the last saved CalWIN EDBC determination. Person roles such as MEM (Member), UP (Unaided Person), FRE (Financially Responsible – excluded) or FRI (Financially Responsible – Excluded) are mismatched between converted CalWIN EDBC data and the new CalSAWS EDBC run.

Run EDBC in CalSAWS to find the Person Role mismatches and compare to the last saved 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.

Eligibility Roles	Role Definition	Examples
MEM (Member)	An applicant who has applied for or is eligible for assistance.	• Assistance unit member • MFBU member • Aided CFHH member
MMO (Medi-Cal Member Only)	A person who is not eligible for cash assistance but is eligible for categorical cash-based Medi-Cal. These case members are financially responsible to the case. They are also included in the unit size.	• CalWORKs or RCA penalized person 18 or older, CalWORKs IPV (after 12/31/1997) • CalWORKs penalized 16–17-year-old. • Infant Supplemental Payment child
FRI (Financially Responsible - Included)	A person who is not eligible for assistance but is financially responsible to the program and is included in the unit size. A person who has declined eligibility is also assigned the FRI role.	• CalWORKs and Medi-Cal unaided step relative • CalWORKs undocumented alien • CalWORKs fleeing or drug felons (after 12/31/1997) if they have countable income • CalWORKs IPV (before 1/1/1998) person • Medi-Cal non-cooperating Customer • Medi-Cal person with no linkage • Medi-Cal declined eligible person
FRE (Financially Responsible - Excluded)	A person who is not eligible for assistance but is financially responsible to the program and is excluded from the unit size.	• CalWORKs and CalFresh sanctioned person • CalFresh undocumented alien

		• CalWORKs fleeing or drug felons (after 12/31/1997) if they do not have countable income • CalFresh IPV or fleeing felon • Medi-Cal spouse or parent of a Pickle person • Medi-Cal QMB, SLMB, QI –1 person when the SSI budget methodology is used
FSO (Family Size Only)	A person who is not eligible for assistance and is not financially responsible to the program but is included in the unit size.	• Unaided step sibling of an eligible child with a parent who is financially responsible
UP (Unaided Person)	A person who is not receiving aid in the program and is not financially responsible to the program. A person who receives another type of assistance (for example SSI) is assigned this role. It is important that these people still apply for aid since they may link another person to the program.	

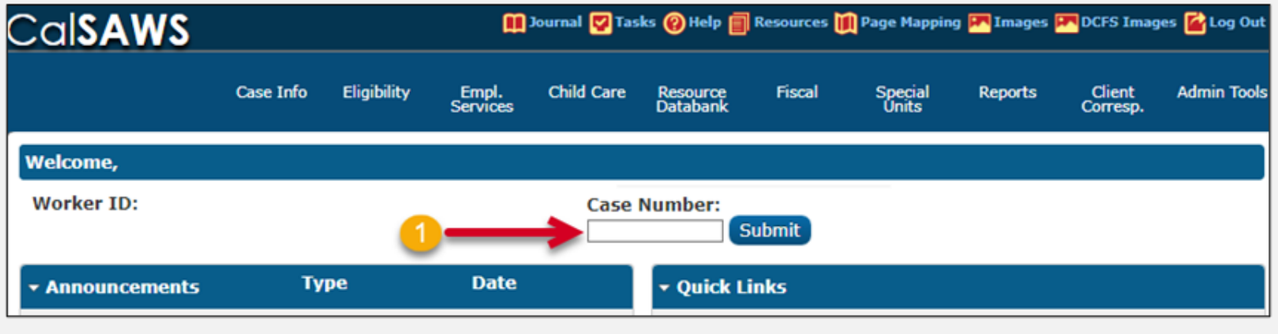
These cases will be identified in the **Conversion EDBC Case Review Report** as follows:

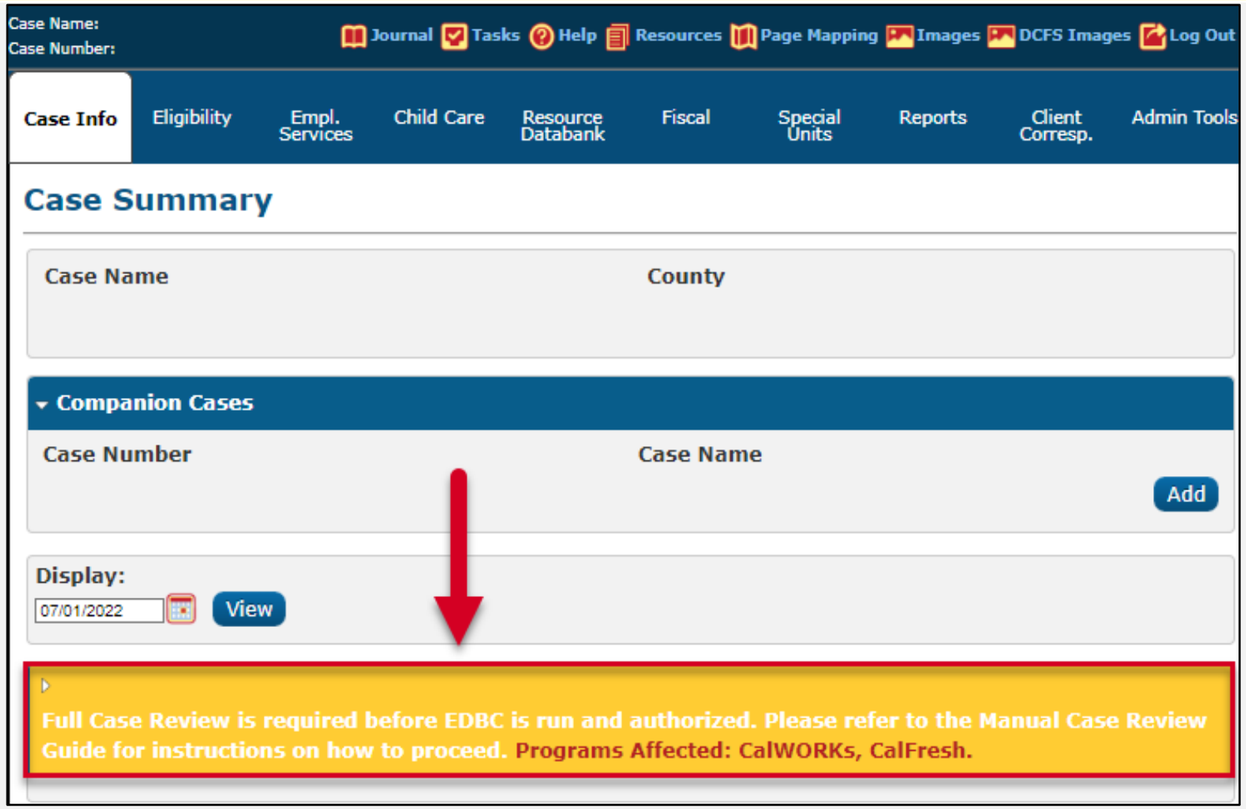
COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY	SSA_INCOME	SSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalWORKs	Program Person Role Mismatch	06/30/2022		3		

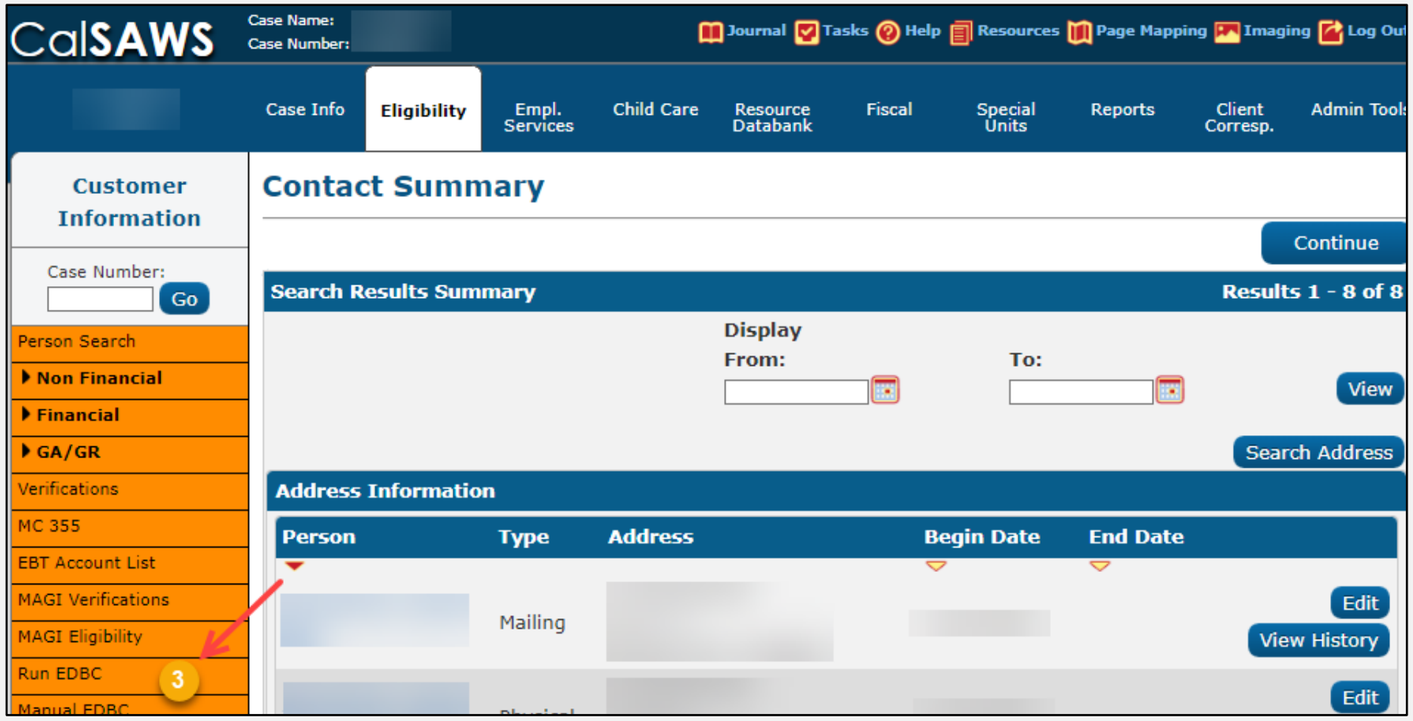
Note: The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided below are intended to direct users to the most impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all the information is entered as accurately as possible to allow for a correct determination to be made.

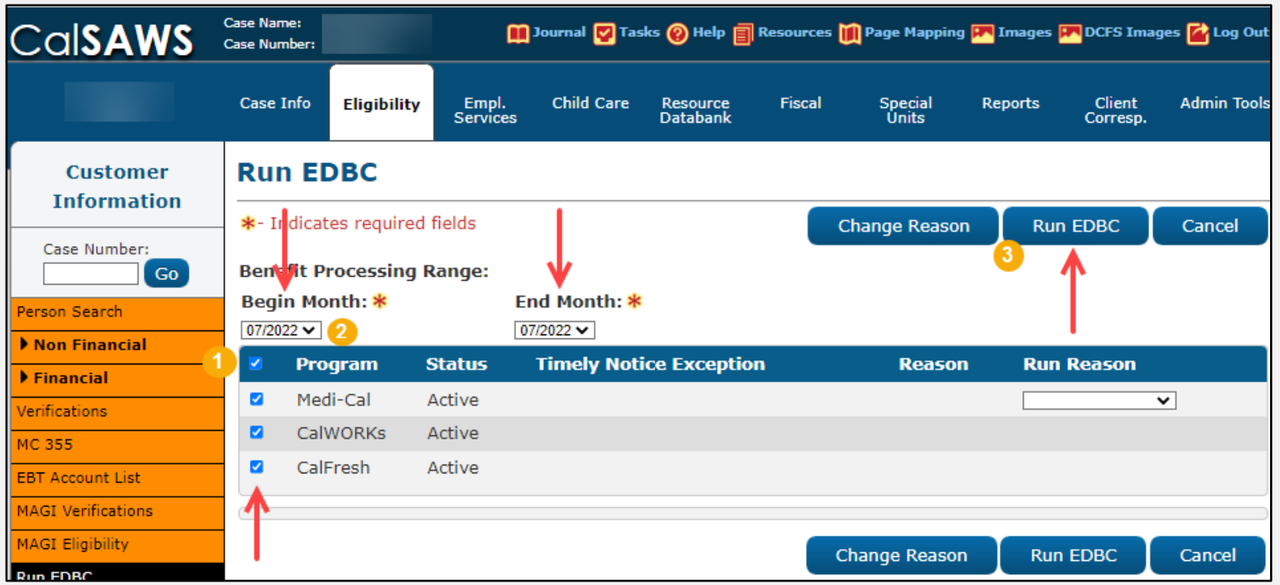
Example

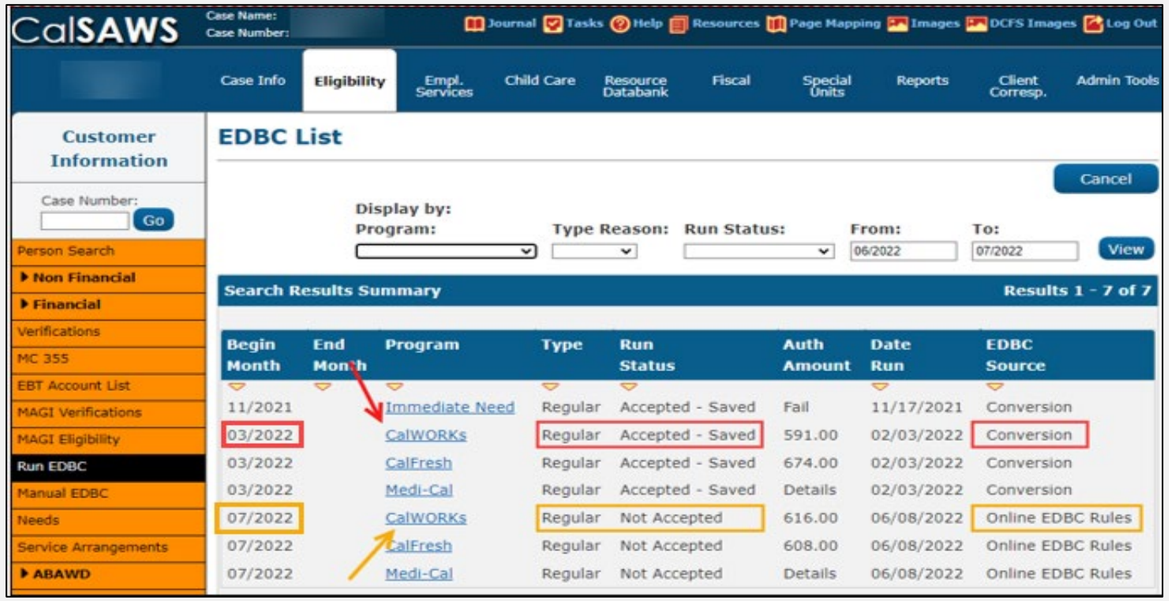
Program Person Role Mismatch

	Steps To Clear Alert	Screenshot
1	Log in to CalSAWS by entering your Username and Password	
2	On the Homepage: 1. Enter the case number and click on the submit button to be directed to the **Case Summary** page. ★ Note: this step is not necessary if already in the **Case Summary** page for the desired case	

Steps To Clear Alert	Screenshot
★ Note the **Yellow Banner** on the **Case Summary** Page	
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.	

Steps To Clear Alert	Screenshot
From the Contact Summary page: 3. Click on **Run EDBC** tab on the Task navigator.	

Steps To Clear Alert	Screenshot
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.	

Steps To Clear Alert	Screenshot
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 EBDC and remove the Yellow Banner, the pending verifications may result in a negative case action and/or potential over issuance. Follow your county policy.	
5 Run EDBC in CalSAWS to find the Person Role mismatches compared with the last CalWIN run Conversion EDBC. The last saved CalWORKs EDBC results were for 03/2022. In this example, Users will compare the **07/2022 future month** CalWORKs EDBC result against the **03/2022 EDBC** result.	

Steps To Clear Alert

When comparing the last saved EDBC results, there is an EDBC Program Person Role Mismatch as a person role and role reason changed from **FRE**, **CW Time Limit** in **03/2022**, to **MEM** having been added back as an active household member in **07/2022**.

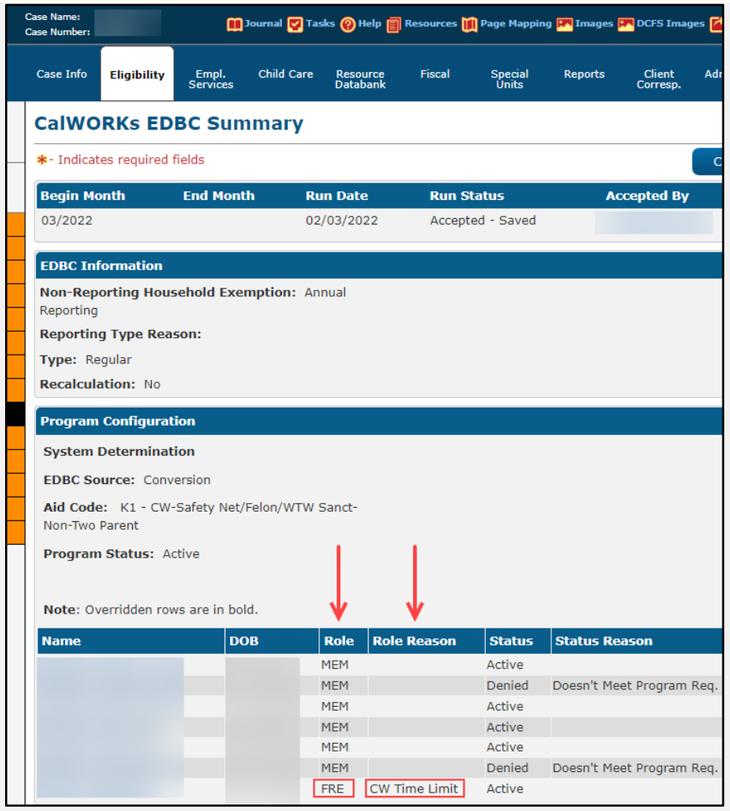
Due to the recent CalWORKs policy change that took effect on May 1, 2022, active adult household members received an increase to their CalWORKs time limits from 48 months to 60 months' time on aid (ACL 20-113).

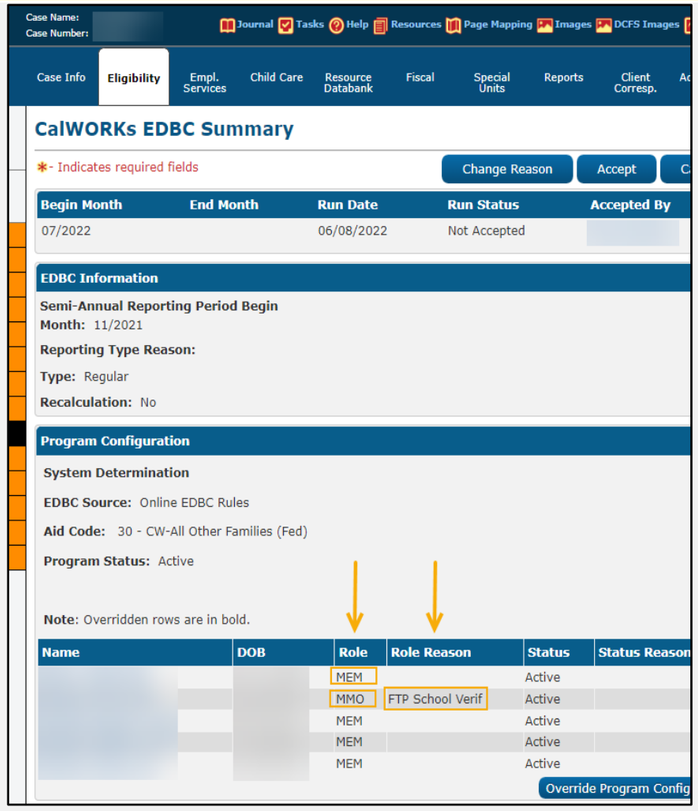
In the example to the right, the addition of 12 months' time on aid for the parent in the case in 07/2022, changed her program person role from **FRE** to **MEM**.

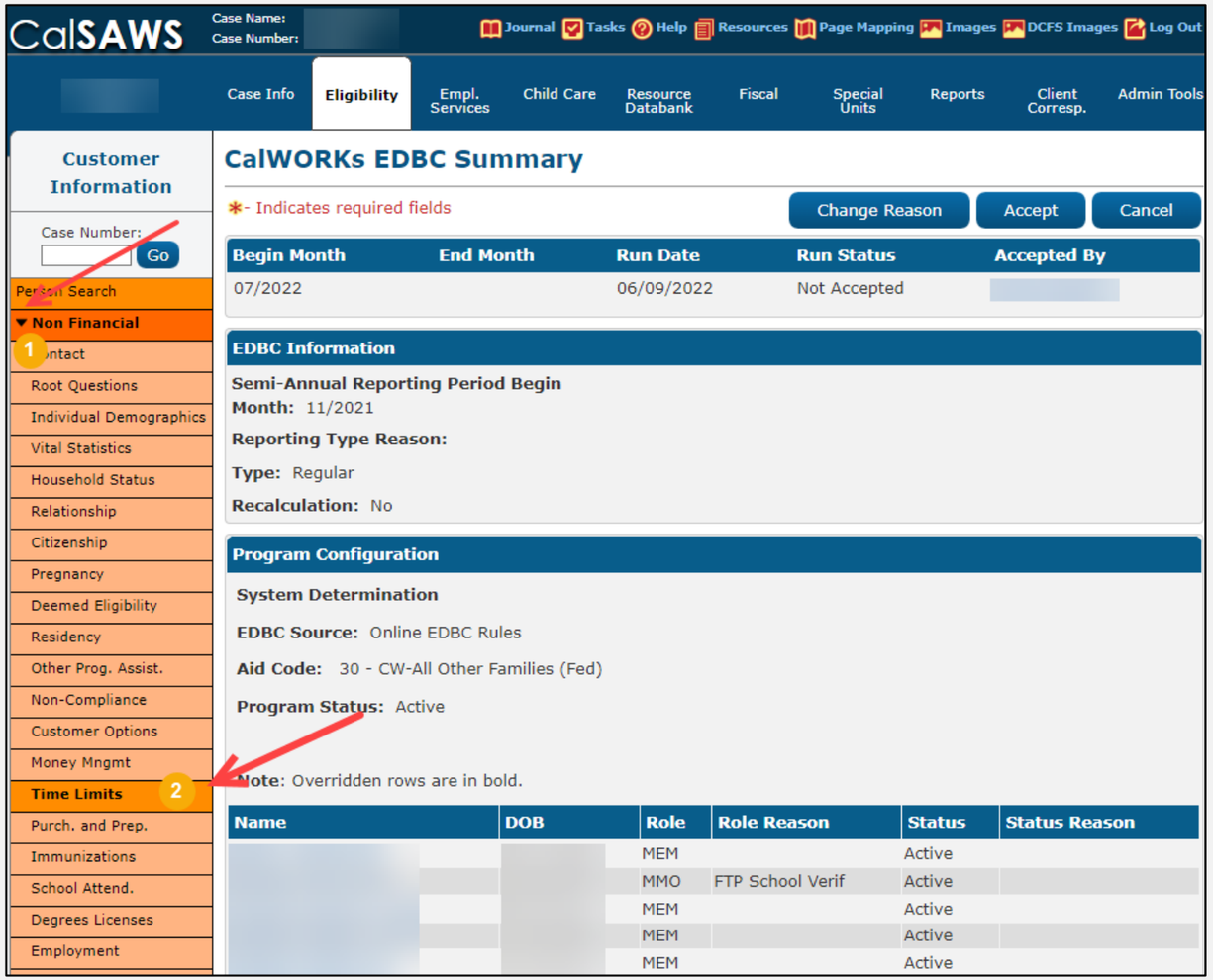
★ Note: A change in program policy is **not** the only reason a person's role and role reason will show an EDBC Mismatch.

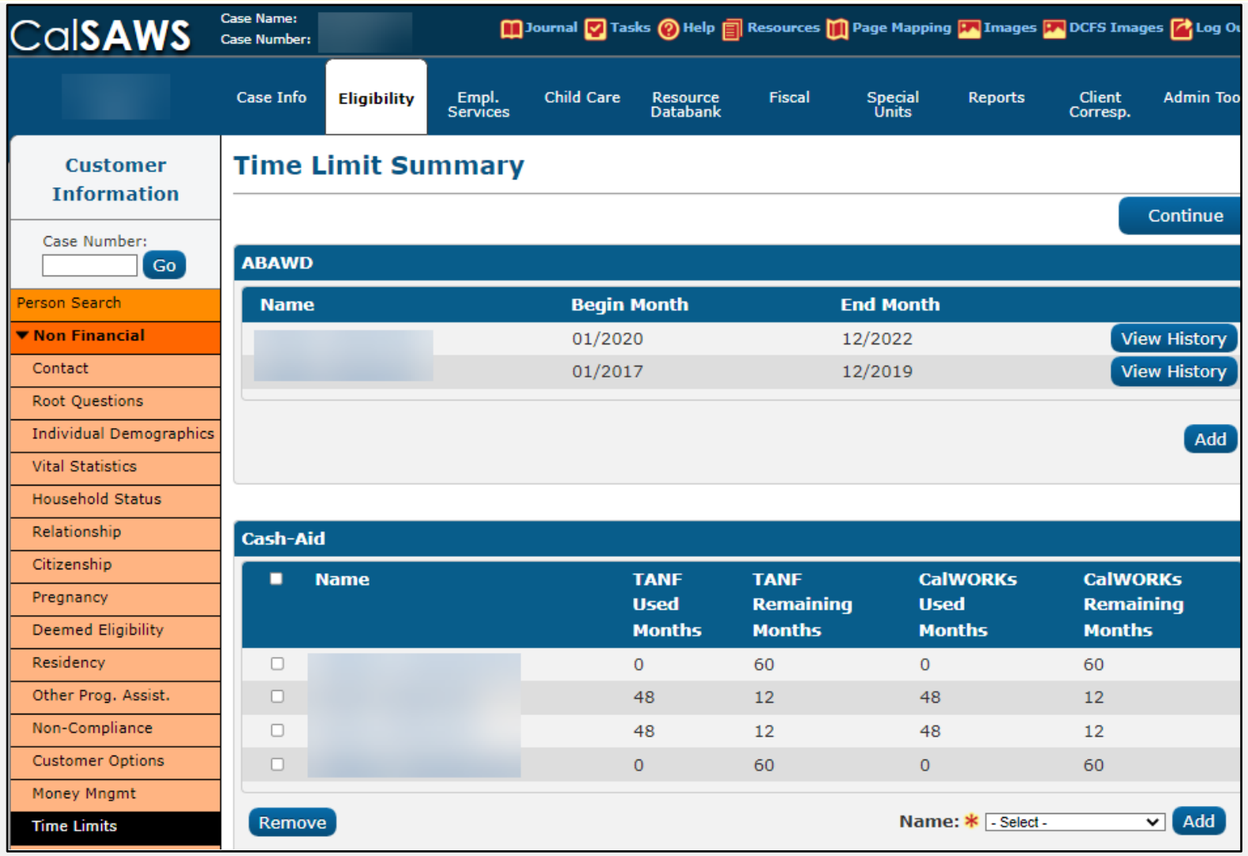
There was also an EDBC Program Person Role Mismatch going from **MEM** to **MMO** for **Failure to Provide School Verification**.

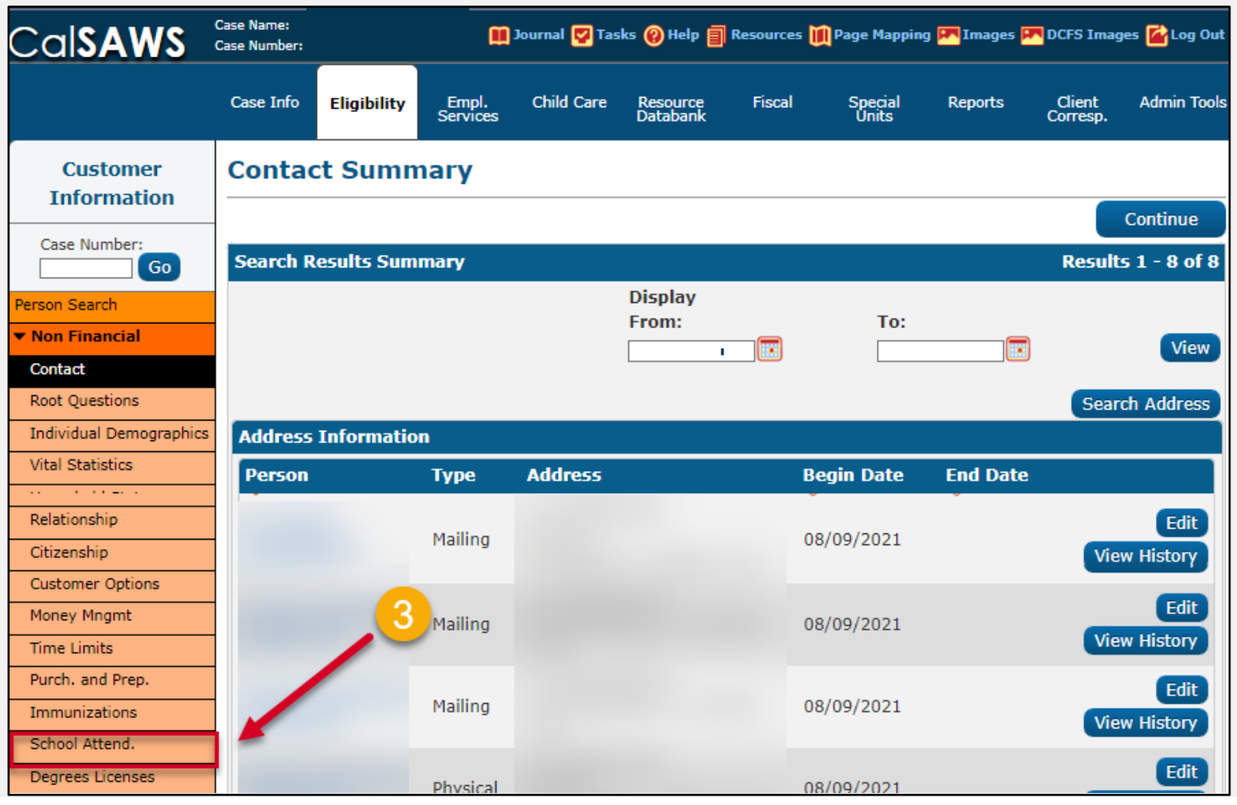
Screenshot

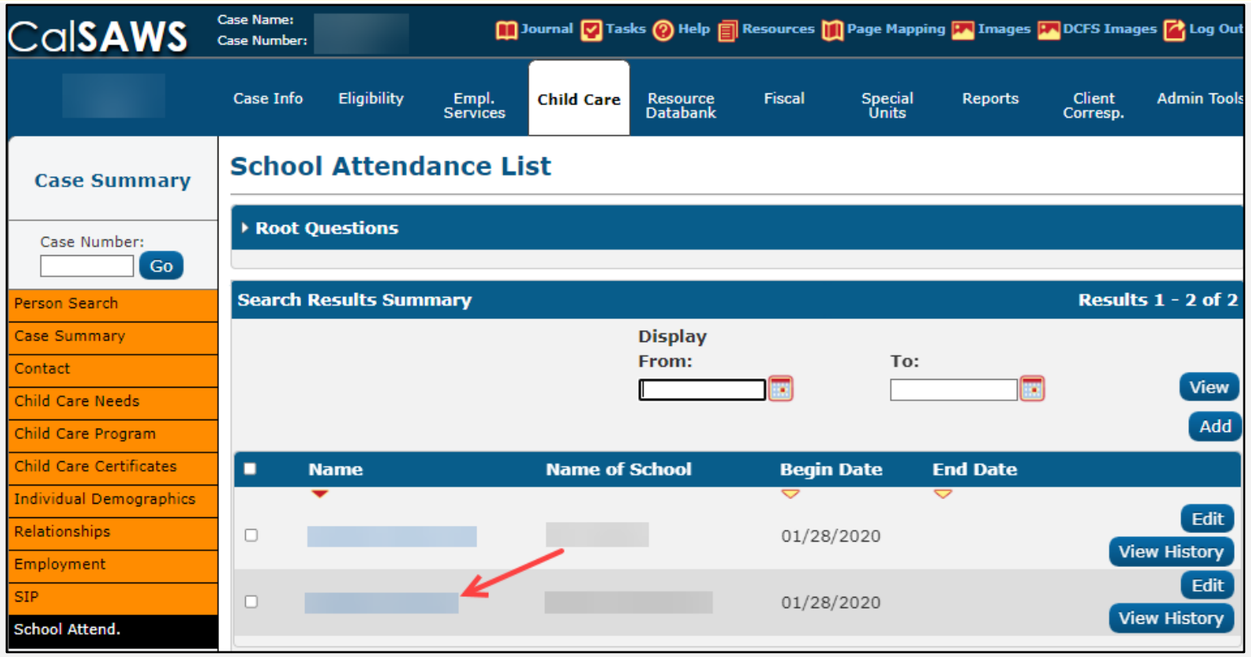




Steps To Clear Alert	Screenshot
6 From the **CalWORKs EDBC Summary** page, navigate to the Time Limits Summary page to review time limit records. 1. In the **Task** navigation bar, click on the **Non-Financial** caret. 2. Click the **Time Limits** hyperlink in the **Task** navigation bar.	

Steps To Clear Alert	Screenshot
7 For instruction on how to add, correct or remove cash aid time limit records, refer to **Job Aid: JA Case Aid Time Limits.** Job Aid Case Aid Time Limits also provides instructions on requesting, approving, or denying time limit extensions.	

Steps To Clear Alert	Screenshot
8 To navigate to the **School Attendance Status Detail** Page: 1. Click on the **Eligibility** tab on the Global navigator. 2. Click on the **Customer Information** tab on the Local navigator. 3. Click the **School Attend.** hyperlink on the **Task** navigator bar.	 

Steps To Clear Alert	Screenshot
9 For instruction on how to add and edit school attendance information, refer to **Job Aid: JA School Attendance Information-Add and Edit** ★ **Note**: While school enrollment information is entered on the **School Attendance Detail** page, school attendance status information is entered on the **School Attendance Status Detail** page.	

Steps To Clear Alert	Screenshot

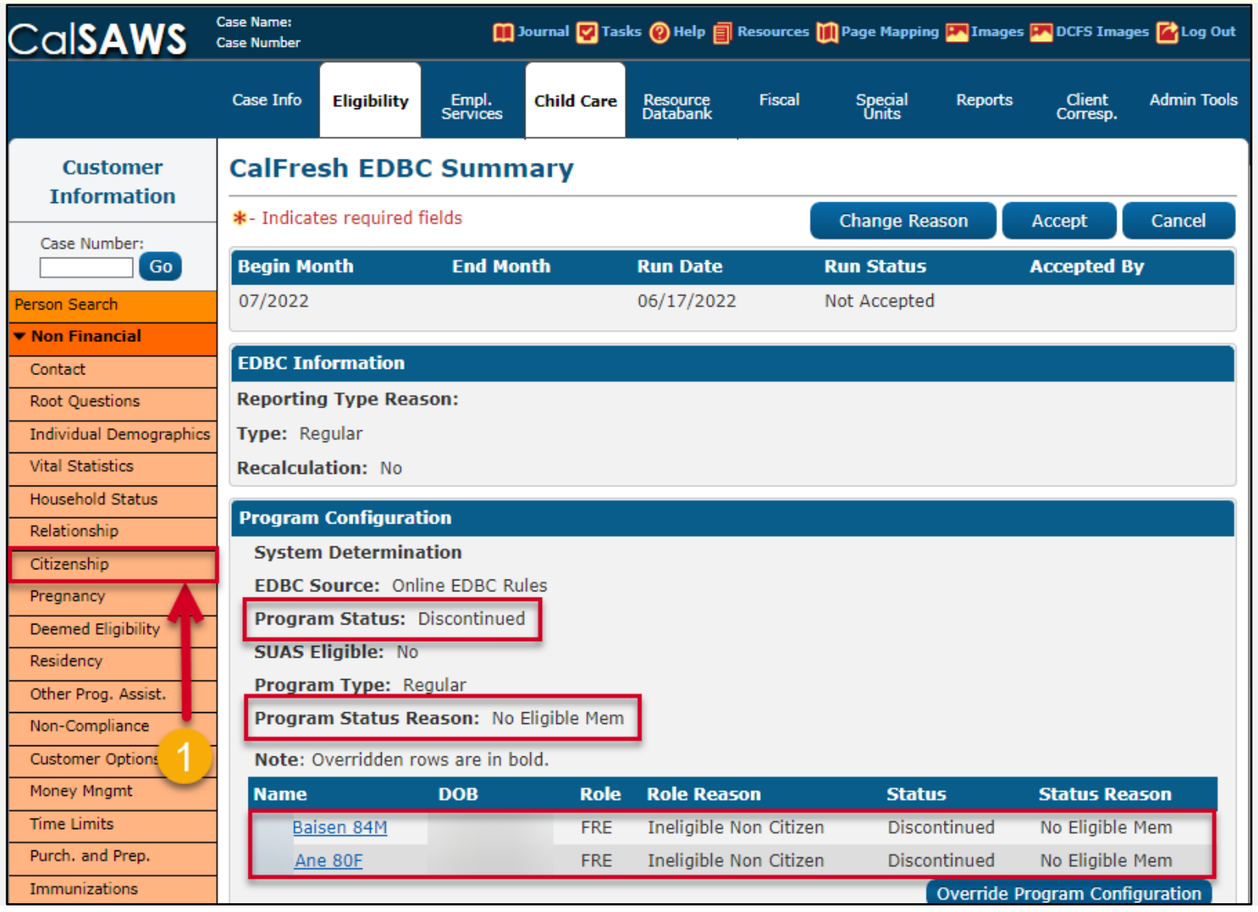
10 The User will need to review EDBC Summary within the **Program Configuration** section of the EDBC Summary to identify and update the data collection pages that may impact the eligibility determination.

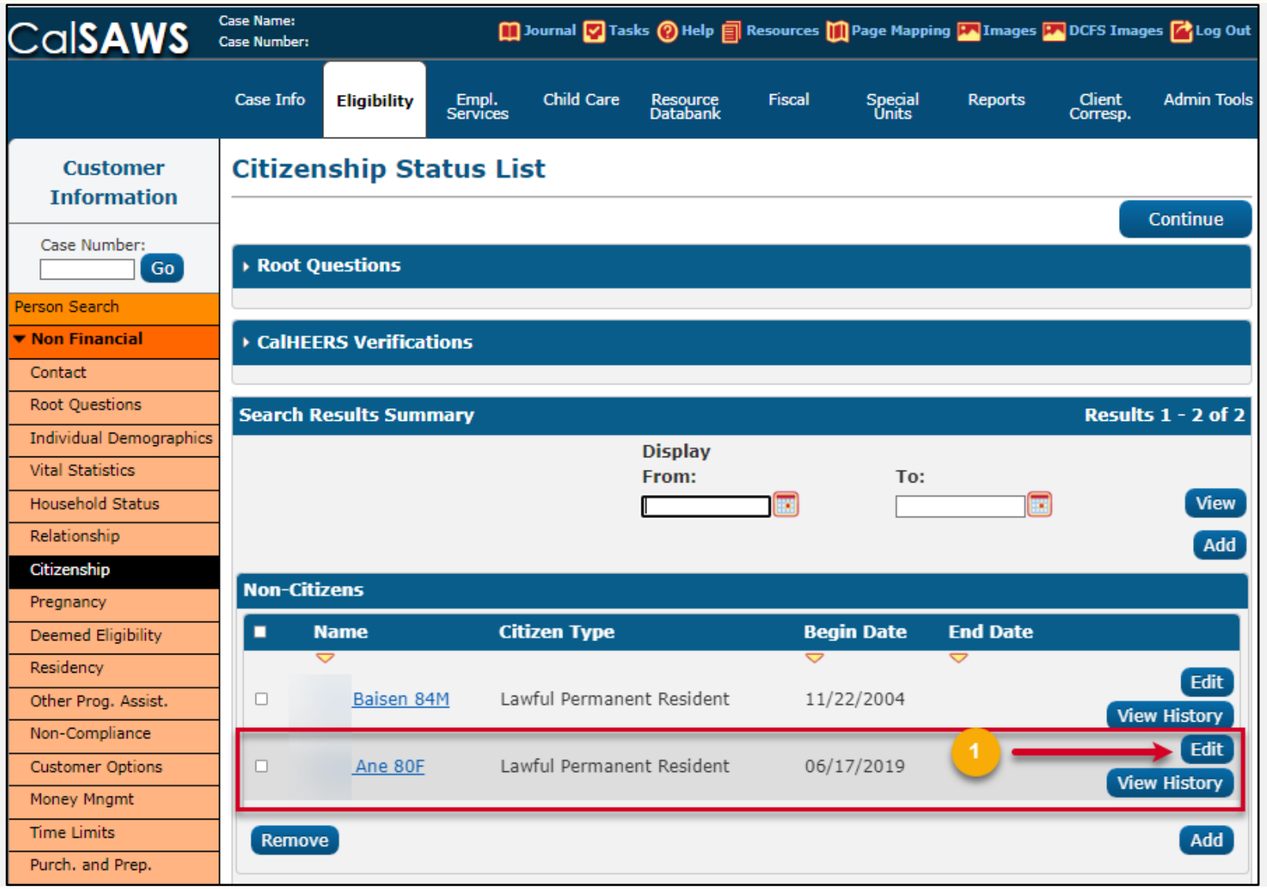
Both HH Members are Discontinued for "Ineligible Non-Citizen" Role Reason. This can be caused due to a required update to the Citizenship Section Code.

1. Navigate to the **Citizenship link** to review the Citizenship Detail Page for information that may need to be updated.

The following Job Aids are available to assist in CalSAWS:

Citizenship and Sponsorship - Add or Edit
Vital Statistics



Steps To Clear Alert	Screenshot
11 From the **Citizenship Status List** Page: Select the **Edit** button next to the HH Member to review and edit the Individual's Citizenship Status Detail page.	

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

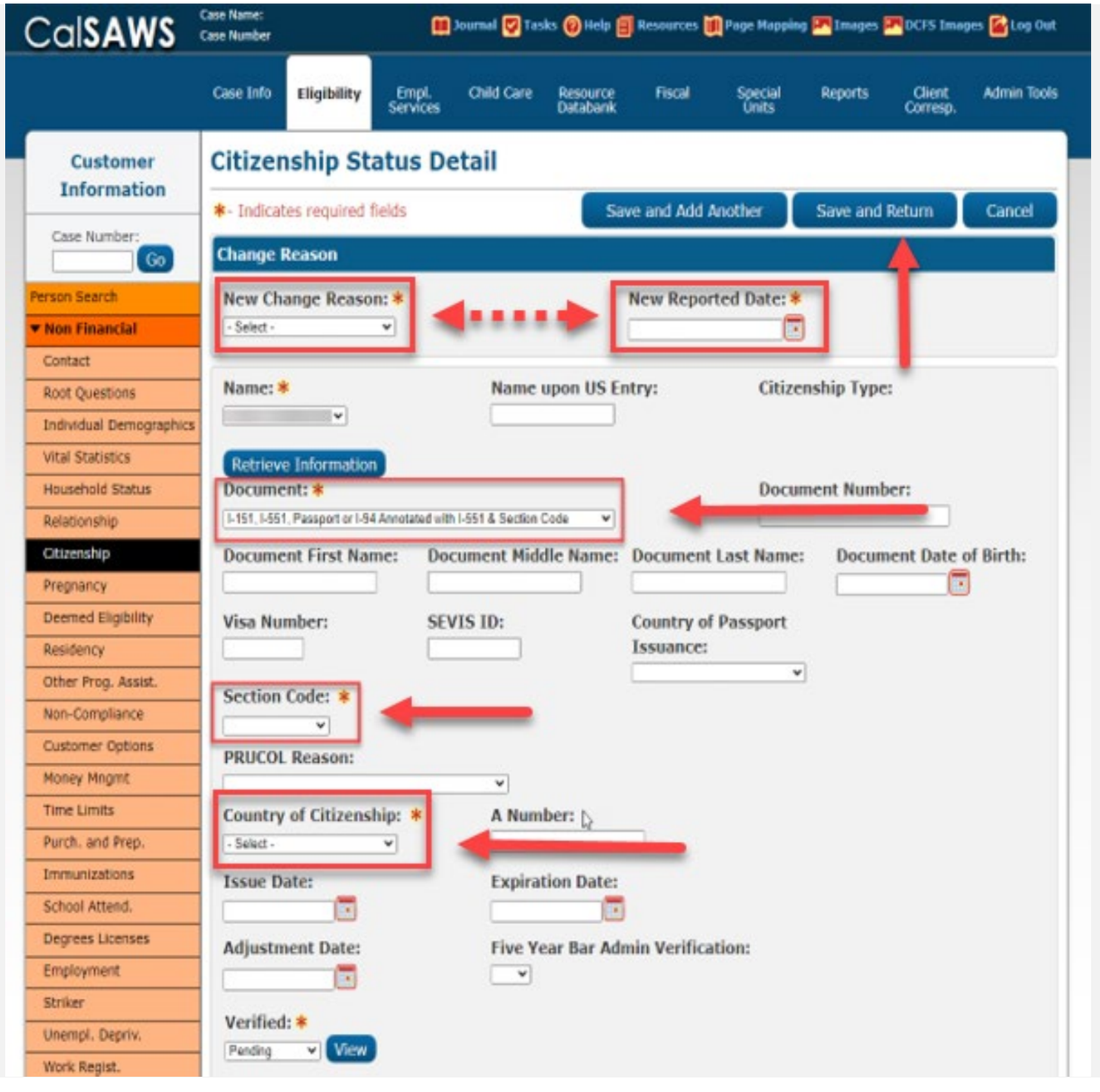
1. Enter **New Change Reason** and **New Reported Date**, as applicable.
2. Select the **Country of Citizenship** as reported and/or verified by the Individual.
3. Enter the correct **Document** Type if not already listed.
4. Select the correct **Section Code** if not already listed.
5. After reviewing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

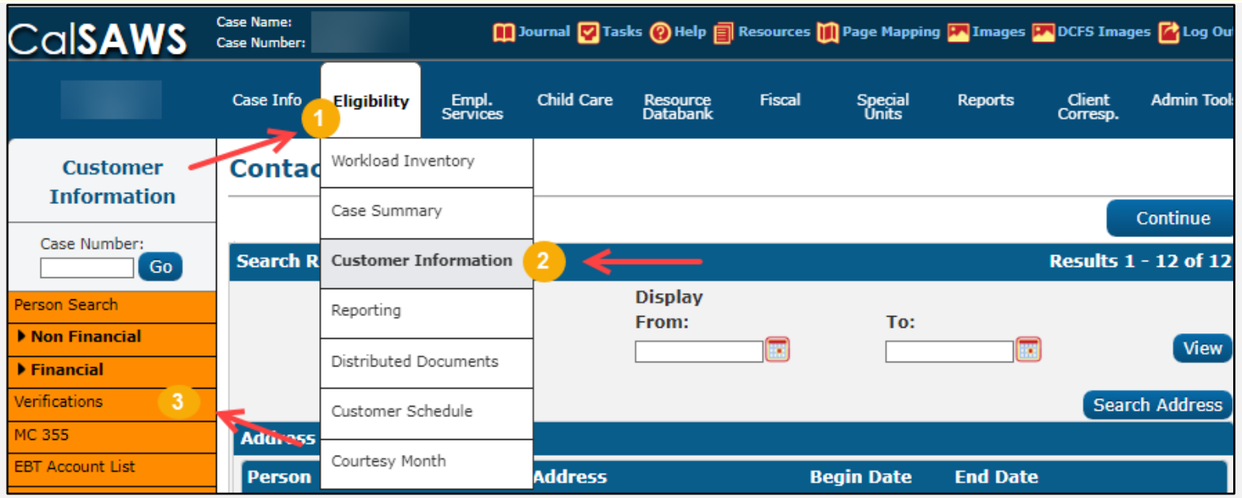
The following CalSAWS Reference Guide is available in the LMS:

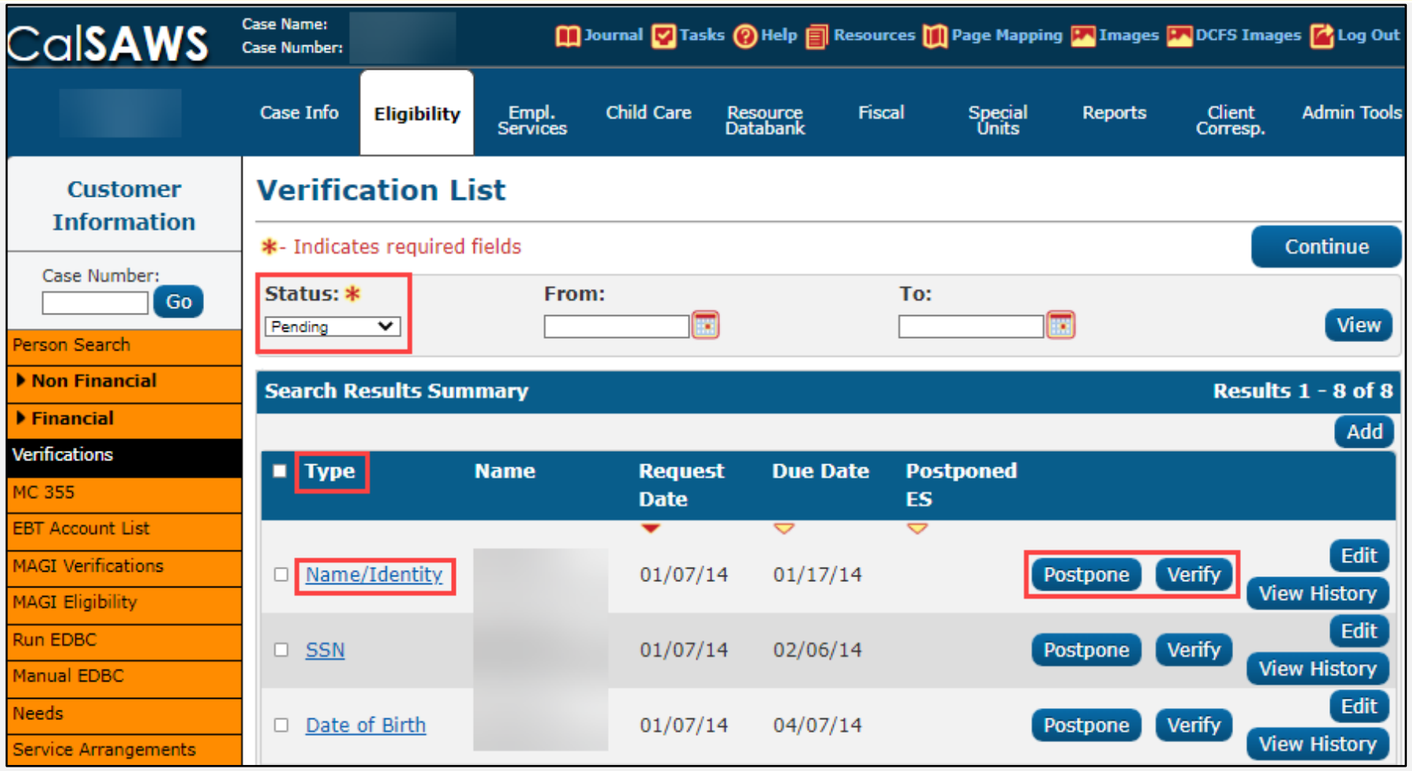
CalSAWS Reference Guide – Change Reason

Additional data collection pages to review for completion:

Individual Demographics, Vital Statistics, Sponsorship, Verifications



	Steps To Clear Alert	Screenshot
13	⚠ When information on a case is pending, Users should review and/or update the **Verification List** and **Verification Detail** pages to manage pending verifications. To navigate and access the **Verification List Page**: 1. Place the curser over **Eligibility** on the **Global** navigation bar. 2. Select **Customer Information** from the **Local** navigator. 3. Click **Verifications** on the **Task** navigation bar. 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 send out a CW 2200 form. Follow 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**	

Steps To Clear Alert	Screenshot
	

Steps To Clear Alert	Screenshot

14 Once Users review all active case programs for any potential data collection discrepancies and make appropriate updates, Users will navigate back to the Run EDBC page to access, review, and accept the new EDBC budget results.

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

⚠ 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.

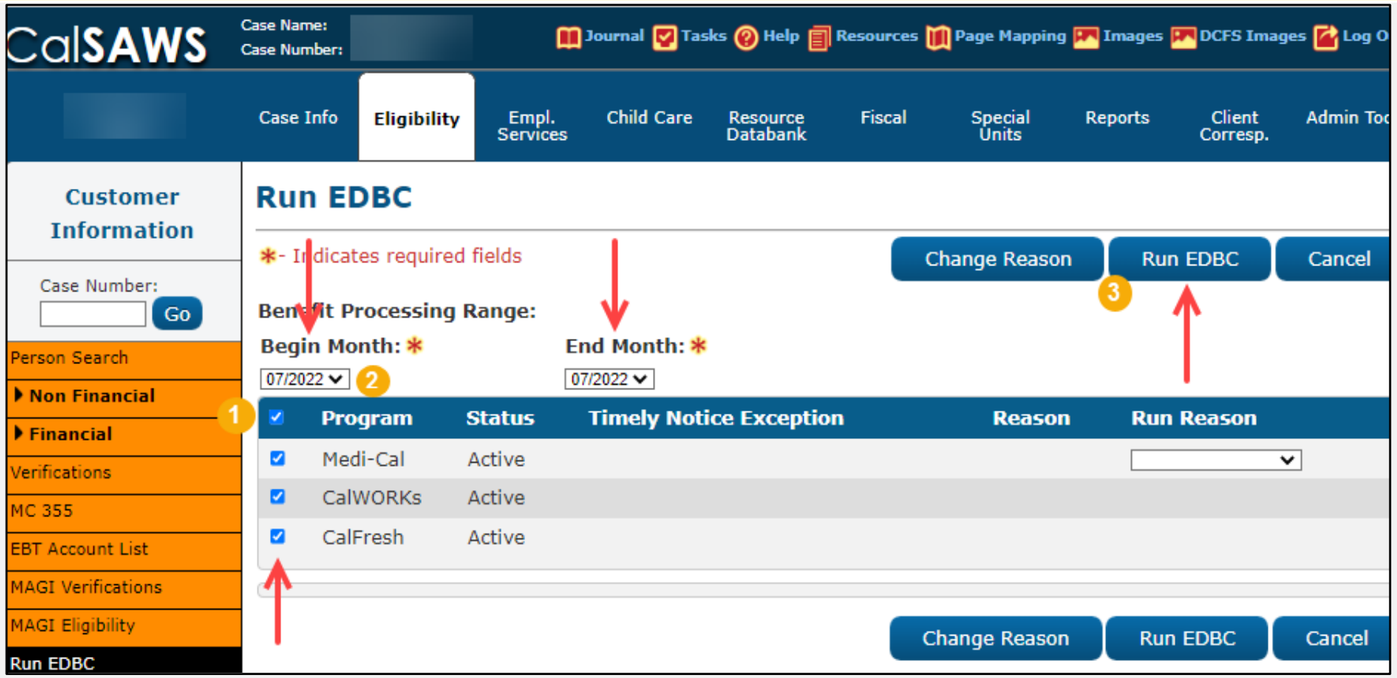
Do **NOT** Accept or Save EDBC Results that you think may be wrong.

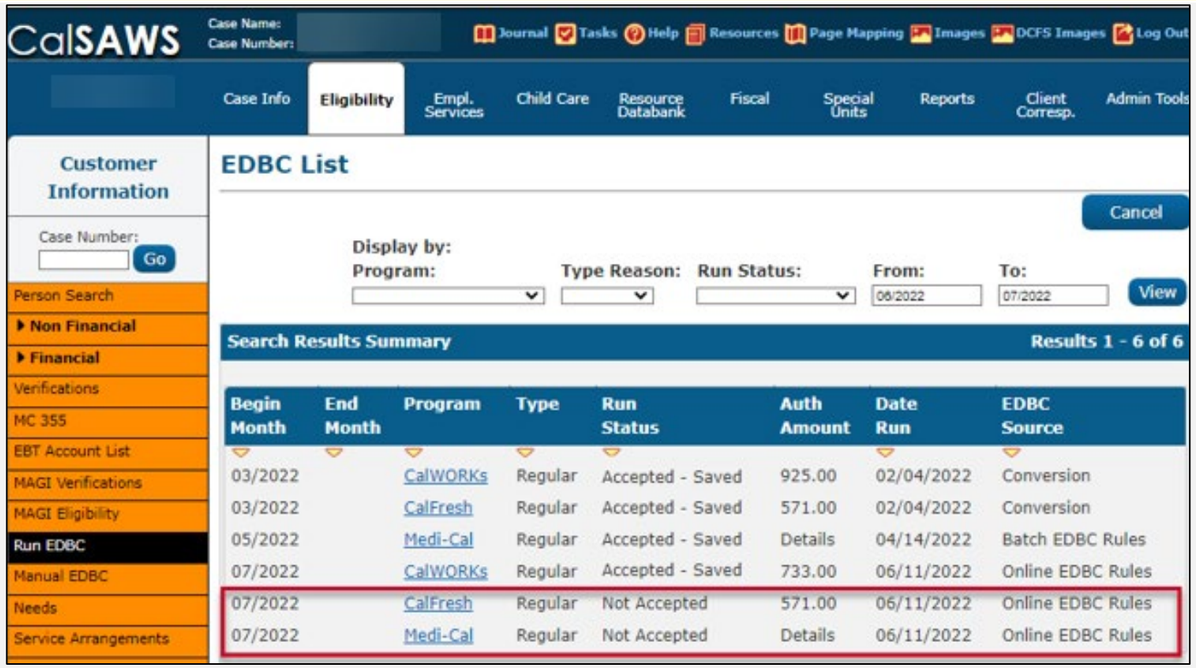
You will have the option to preview the NOA before it is sent out to the Applicant/Participant, by clicking the Preview NOAs button after EDBC results have been accepted.

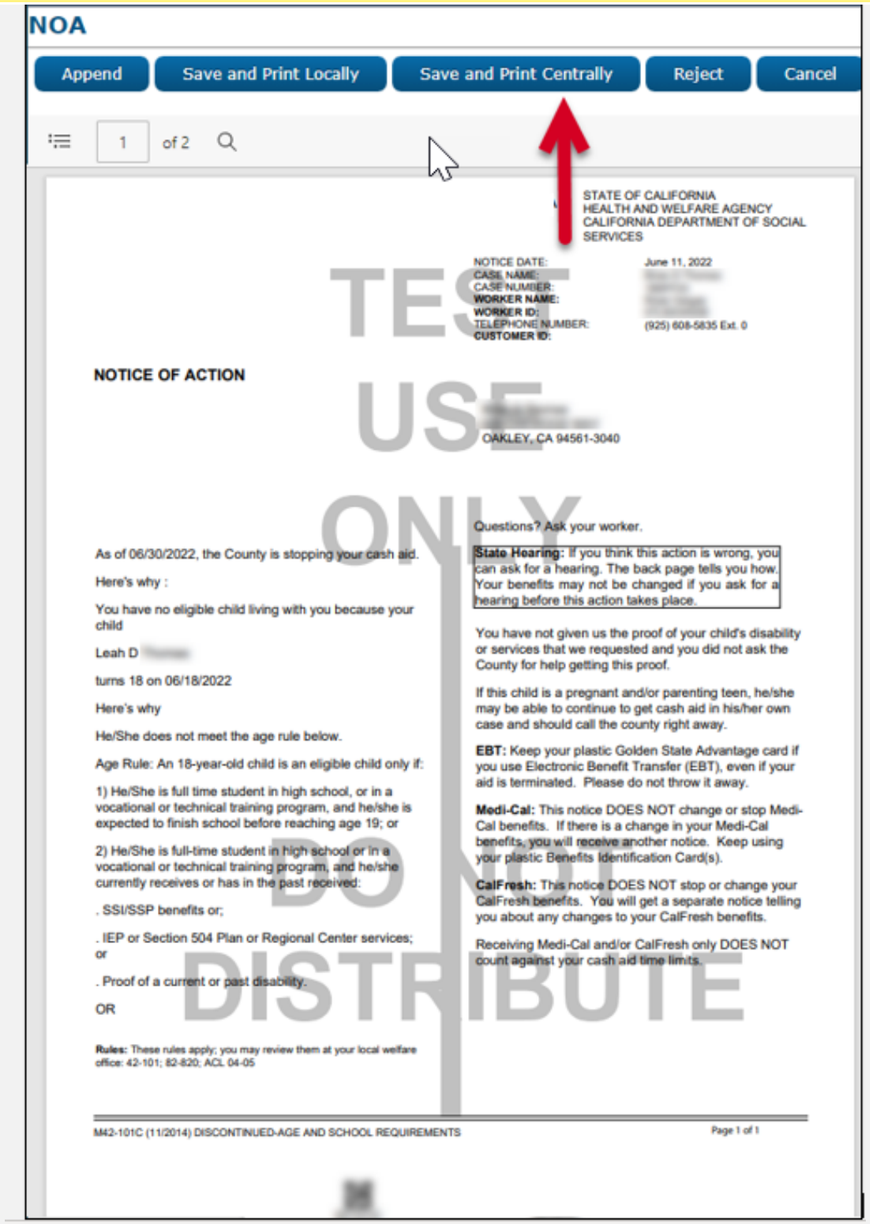
Follow county policy when Troubleshooting EDBC Results.

Additional CalSAWS 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



Steps To Clear Alert		Screenshot
15	On the **EDBC List** page, click on the Program hyperlink to review each EDBC run. Once all the EDBC's have been accepted the user will be able to Save and Continue. Once all active programs have been accepted and saved, CalSAWS will navigate Users to the **Distributed Documents Search** page. Review all pending Notices of Action for accuracy.	

Steps To Clear Alert		Screenshot
16	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. Once the NOA are reviewed, accepted, and saved, journal the actions taken according to navigate back to the **Case Summary** page. Note: If the NOA is not reviewed, it will go out by way of an overnight batch process.	

Steps To Clear Alert		Screenshot
17	Journal the action taken according to county policy. The Yellow Banner will no longer appear on the case. The case review is complete!	