

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.	<ul style="list-style-type: none"><li>Assistance unit member</li><li>MFBU member</li><li>Aided CFHH member</li></ul>
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.	<ul style="list-style-type: none"><li>CalWORKs or RCA penalized person 18 or older, CalWORKs IPV (after 12/31/1997)</li><li>CalWORKs penalized 16–17-year-old.</li><li>Infant Supplemental Payment child</li></ul>
FRI (Financially Responsible - Included)	<p>A person who is not eligible for assistance but is financially responsible to the program and is included in the unit size.</p> <p>A person who has declined eligibility is also assigned the FRI role.</p>	<ul style="list-style-type: none"><li>CalWORKs and Medi-Cal unaided step relative</li><li>CalWORKs undocumented alien</li><li>CalWORKs fleeing or drug felons (after 12/31/1997) if they have countable income</li><li>CalWORKs IPV (before 1/1/1998) person</li><li>Medi-Cal non-cooperating Customer</li><li>Medi-Cal person with no linkage</li><li>Medi-Cal declined eligible person</li></ul>
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.	<ul style="list-style-type: none"><li>CalWORKs and CalFresh sanctioned person</li><li>CalFresh undocumented alien</li></ul>

		<ul style="list-style-type: none"><li>CalWORKs fleeing or drug felons (after 12/31/1997) if they do not have countable income</li><li>CalFresh IPV or fleeing felon</li><li>Medi-Cal spouse or parent of a Pickle person</li><li>Medi-Cal QMB, SLMB, QI –1 person when the SSI budget methodology is used</li></ul>
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.	<ul style="list-style-type: none"><li>Unaided step sibling of an eligible child with a parent who is financially responsible</li></ul>
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.	

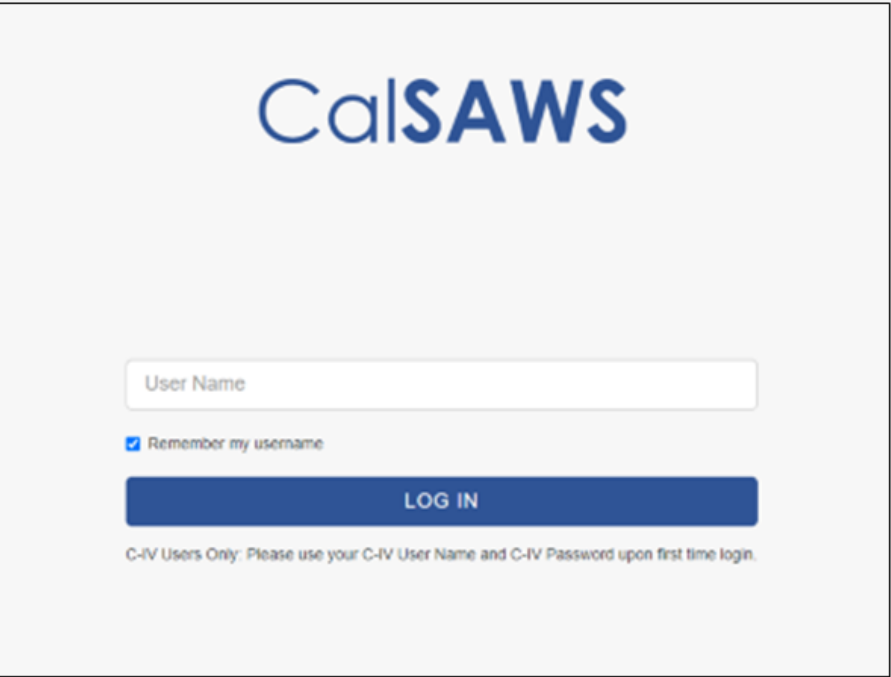

These cases will be identified in the **Conversion EDBC Case Review Report** as follows:

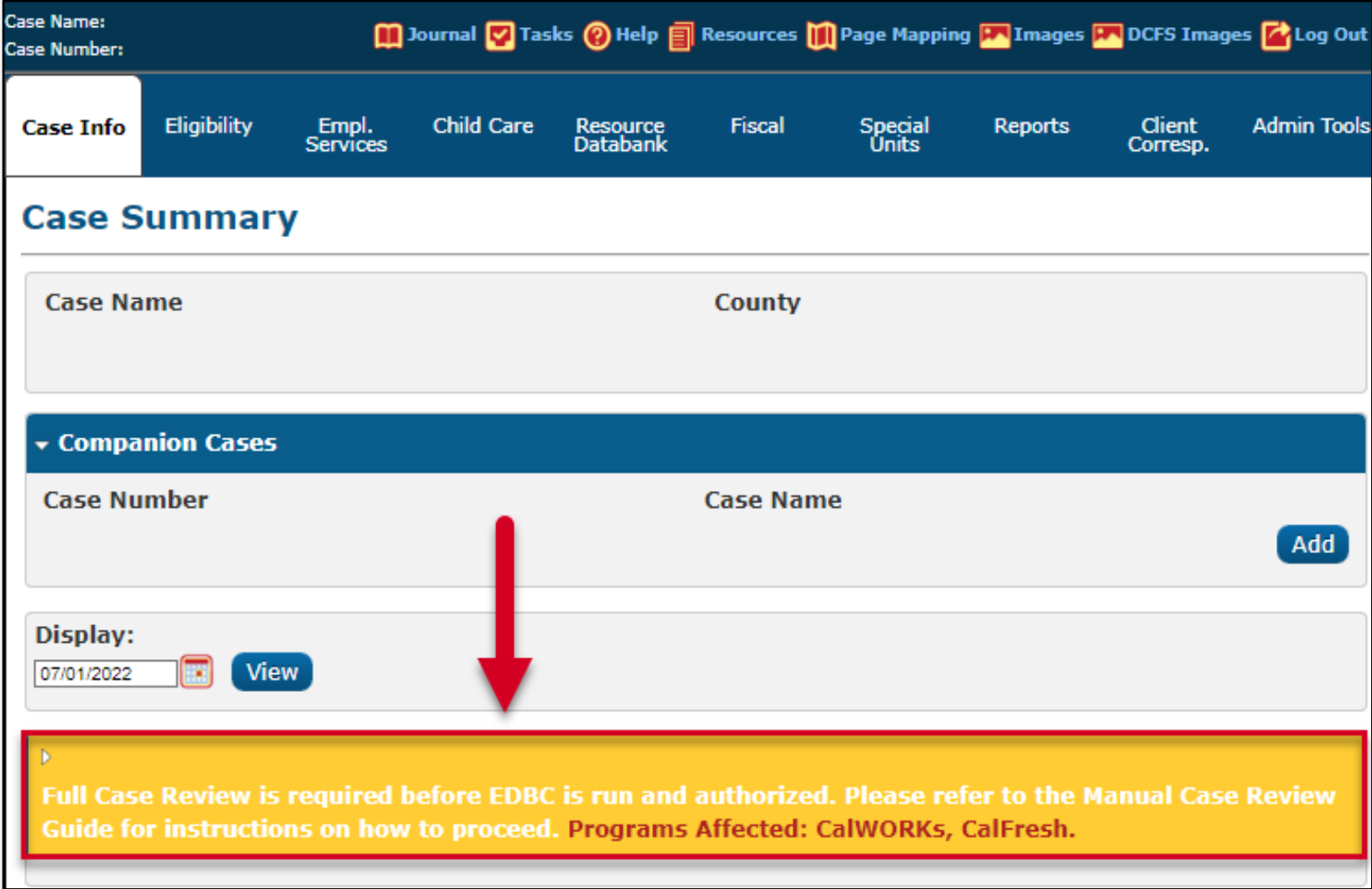

COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY	SSA_INCOME	SSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalWORKs	Program Person Role Mismatch	06/30/2022		3		

**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	 The screenshot shows the CalSAWS login page. At the top is the CalSAWS logo. Below it is a 'User Name' input field. Underneath the field is a checkbox labeled 'Remember my username' which is checked. Below the checkbox is a blue 'LOG IN' button. At the bottom of the login area, there is a small note: 'C-IV Users Only: Please use your C-IV User Name and C-IV Password upon first time login.'
2	<p>On the Homepage:</p> <p>1. Enter the case number and click on the submit button to be directed to the <b>Case Summary</b> page.</p> <p>★ Note: this step is not necessary if already in the <b>Case Summary</b> page for the desired case</p>	 The screenshot shows the CalSAWS homepage. At the top is a dark blue header with the CalSAWS logo and several icons with labels: Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below the header is a navigation bar with links: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area has a 'Welcome,' message, a 'Worker ID:' label, and a 'Case Number:' label. There is an input field for the case number and a blue 'Submit' button. A red arrow with the number '1' in a yellow circle points to the case number input field. At the bottom, there are two sections: 'Announcements' with columns for 'Type' and 'Date', and 'Quick Links'.

Steps To Clear Alert		Screenshot
<div>★ Note the <b>Yellow Banner</b> on the <b>Case Summary</b> Page</div>		 <p>This screenshot shows the 'Case Summary' page in CalSAWS. At the top, there is a navigation bar with links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a sub-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 contains fields for Case Name and County. Below these is a section for 'Companion Cases' with a table for Case Number and Case Name, and an 'Add' button. A 'Display:' section shows a date of 07/01/2022 and a 'View' button. A large red arrow points down to a yellow banner at the bottom of the page with the 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: CalWORKs, CalFresh.'</p>
3	<div>On the <b>Case Summary</b> Page:</div> <div><div>1. Click on the <b>Eligibility</b> tab on the Global navigator.</div><div>2. Click on the <b>Customer Information</b> tab on the Local navigator.</div></div>	 <p>This screenshot shows the 'Case Summary' page with the 'Eligibility' tab selected in the global navigation bar. In the local navigation bar on the left, the 'Customer Information' tab is highlighted with a red arrow and a yellow circle labeled '2'. Another red arrow and a yellow circle labeled '1' point to the 'Eligibility' tab in the global navigation bar. The main content area shows a table with columns for Case Name, Case Number, and Case Summary. The 'Customer Information' tab is active, showing a 'County' field and a 'Case Name' field. A red flag icon is visible next to the 'County' field. The 'Case Summary' tab is also visible in the local navigation bar.</p>

Steps To Clear Alert

From the Contact Summary page:

3. Click on **Run EDBC** tab on the Task navigator.

Screenshot

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, Imaging, 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, a 'Customer Information' sidebar contains a 'Case Number' field with a 'Go' button and a list of tasks. The 'Run EDBC' task is highlighted with a yellow circle and a red arrow pointing to it. The main content area is titled 'Contact Summary' and includes a 'Continue' button. Below this is a 'Search Results Summary' section showing 'Results 1 - 8 of 8'. It has a 'Display' section with 'From' and 'To' date pickers and a 'View' button. Below that is an 'Address Information' table with columns: Person, Type, Address, Begin Date, and End Date. The table has two rows, with the first row showing 'Mailing' as the type. To the right of the table are 'Edit' and 'View History' buttons. At the bottom right of the table is another 'Edit' button.

Steps To Clear Alert		Screenshot
4	<div>On the <b>Run EDBC</b> page:</div> <div><div>1. Select all applicable <b>Programs</b>.</div><div><div>★</div><div>Note: Program fields must be selected first or the Begin and End Months will show grayed out.</div></div><div>2. 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></div><div>3. Click <b>Run EDBC</b></div><div><div>⚠</div><div>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.</div></div></div>	<p>The screenshot displays the CalSAWS 'Run EDBC' interface. On the left sidebar, under 'Customer Information', the 'Non Financial' program category is selected, indicated by a red arrow and the number '1'. The main content area shows the 'Benefit Processing Range' section with 'Begin Month' and 'End Month' dropdown menus, both set to '07/2022', with a red arrow and the number '2' pointing to them. Below this is a table with columns: Program, Status, Timely Notice Exception, Reason, and Run Reason. Three programs are listed: Medi-Cal (Active), CalWORKs (Active), and CalFresh (Active), each with a checked checkbox. A red arrow points to the bottom of this table. At the top right of the main area, there are buttons for 'Change Reason', 'Run EDBC' (highlighted with a red arrow and the number '3'), and 'Cancel'. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out.</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. 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

The screenshot shows the CalSAWS 'Run EDBC' interface. The 'Eligibility' tab is selected. The 'Run EDBC' section has a 'Change Reason' button, a 'Run EDBC w/o Verifications' button (highlighted with a red arrow), and a 'Cancel' button. Below these are fields for 'Benefit Processing Range' with 'Begin Month' (07/2022) and 'End Month' (07/2022). A table lists programs: CalWORKs, CalFresh, and Medi-Cal, all with 'Active' status. A red box at the bottom states: 'To run EDBC without these verifications, click on the "Run EDBC w/o Verifications" button.'

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.

The screenshot shows the CalSAWS 'EDBC List' interface. The 'Eligibility' tab is selected. The 'EDBC List' section has a 'Display by:' dropdown set to 'Program'. Below are filters for 'Type Reason', 'Run Status', 'From' (06/2022), and 'To' (07/2022). A 'Search Results Summary' table shows results 1-7 of 7. The table has columns: Begin Month, End Month, Program, Type, Run Status, Auth Amount, Date Run, and EDBC Source. The '07/2022' row is highlighted with a yellow box, and the '03/2022' row is highlighted with a red box. A red arrow points to the '07/2022' row, and a yellow arrow points to the '03/2022' row.

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
11/2021		Immediate Need	Regular	Accepted - Saved	Fail	11/17/2021	Conversion
03/2022		CalWORKs	Regular	Accepted - Saved	591.00	02/03/2022	Conversion
03/2022		CalFresh	Regular	Accepted - Saved	674.00	02/03/2022	Conversion
03/2022		Medi-Cal	Regular	Accepted - Saved	Details	02/03/2022	Conversion
07/2022		CalWORKs	Regular	Not Accepted	616.00	06/08/2022	Online EDBC Rules
07/2022		CalFresh	Regular	Not Accepted	608.00	06/08/2022	Online EDBC Rules
07/2022		Medi-Cal	Regular	Not Accepted	Details	06/08/2022	Online EDBC Rules

Steps To Clear Alert

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

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS Images

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Adr

CalWORKs EDBC Summary

\* Indicates required fields

Begin Month	End Month	Run Date	Run Status	Accepted By
03/2022		02/03/2022	Accepted - Saved	

EDBC Information

Non-Reporting Household Exemption: Annual Reporting

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Conversion

Aid Code: K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
		MEM		Active	
		MEM		Denied	Doesn't Meet Program Req.
		MEM		Active	
		MEM		Active	
		MEM		Active	
		MEM		Denied	Doesn't Meet Program Req.
		<b>FRE</b>	<b>CW Time Limit</b>	Active	

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS Images

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Ac

CalWORKs EDBC Summary

\* Indicates required fields

Change ReasonAcceptC

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/08/2022	Not Accepted	

EDBC Information

Semi-Annual Reporting Period Begin Month: 11/2021

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
		MEM		Active	
		MMO	FTP School Verif	Active	
		MEM		Active	
		MEM		Active	
		MEM		Active	

Override Program Config



Steps To Clear Alert

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.

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

1 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 2

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		06/09/2022	Not Accepted	<div></div>

EDBC Information

Semi-Annual Reporting Period Begin Month: 11/2021

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
		MEM		Active	
		MMO	FTP School Verif	Active	
		MEM		Active	
		MEM		Active	
		MEM		Active	

### Steps To Clear Alert

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.

### 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

Time Limit Summary

Continue

ABAWD

Name	Begin Month	End Month	
<div></div>	01/2020	12/2022	<div>View History</div>
<div></div>	01/2017	12/2019	<div>View History</div>

Add

Cash-Aid

<input type="checkbox"/>	Name	TANF Used Months	TANF Remaining Months	CalWORKs Used Months	CalWORKs Remaining Months
<input type="checkbox"/>	<div></div>	0	60	0	60
<input type="checkbox"/>	<div></div>	48	12	48	12
<input type="checkbox"/>	<div></div>	48	12	48	12
<input type="checkbox"/>	<div></div>	0	60	0	60

Remove

Name: \* 

- Select -

Add

Steps To Clear Alert

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.

Screenshot

Steps To Clear Alert

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.

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

Case Summary

Case Number:

Person Search

Case Summary

Contact

Child Care Needs

Child Care Program

Child Care Certificates

Individual Demographics

Relationships

Employment

SIP

School Attend.

School Attendance List

Root Questions

Search Results Summary

Results 1 - 2 of 2

Display From:  To:

☐

Name

Name of School

Begin Date

End Date

☐

01/28/2020

Edit

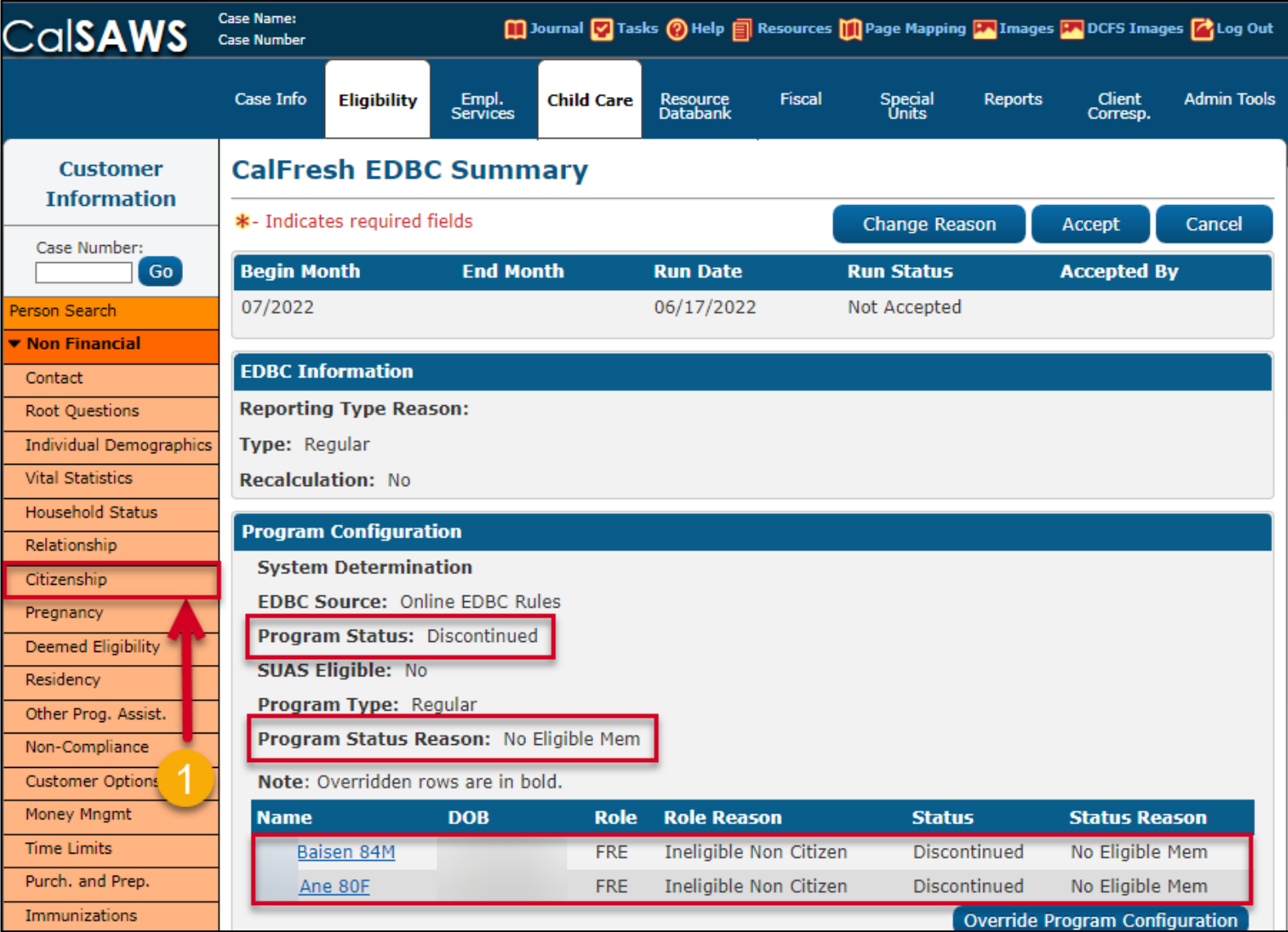
View History

☐

01/28/2020

Edit

View History

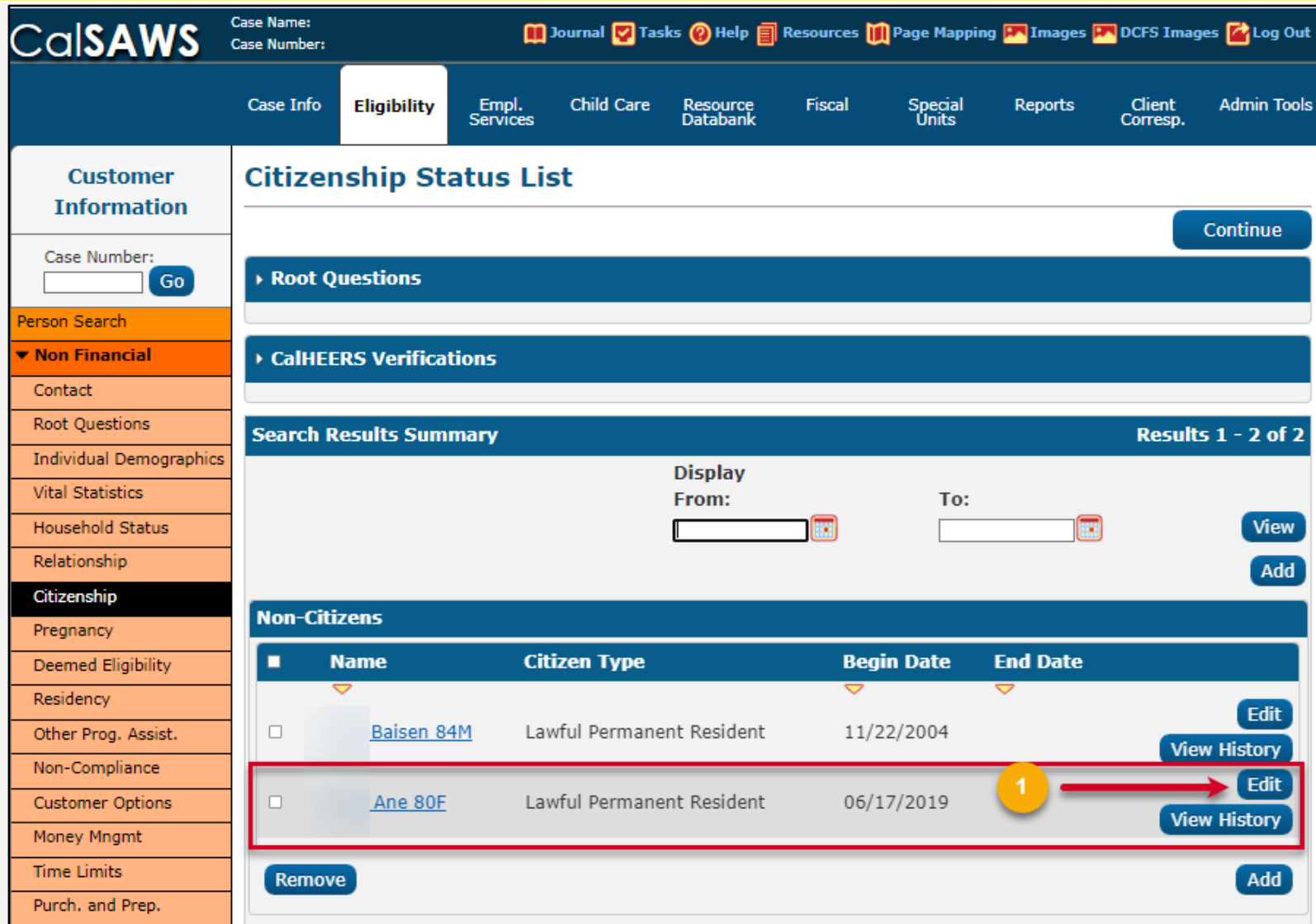
Steps To Clear Alert		Screenshot
10	The User will need to review EDBC Summary within the <b>Program Configuration</b> section of the EDBC Summary to identify and update the data collection pages that may impact the eligibility determination.	
	<p>Both HH Members are Discontinued for "Ineligible Non-Citizen" Role Reason. This can be caused due to a required update to the Citizenship Section Code.</p> <p>1. Navigate to the <b>Citizenship</b> link 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</b></p> <p><b>Vital Statistics</b></p>	

## 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.



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 has tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The left sidebar lists various options, with 'Citizenship' highlighted. 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'. A table titled 'Non-Citizens' 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.

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



- 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

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

Employment

Striker

Unempl. Depriv.

Work Regist.

Citizenship Status Detail

\* Indicates required fields

Save and Add AnotherSave and ReturnCancel

Change Reason

New Change Reason: \*  
- Select -

New Reported Date: \*

Name: \*

Name upon US Entry:

Citizenship Type:

Retrieve Information

Document: \*  
I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code

Document Number:

Document First Name:

Document Middle Name:

Document Last Name:

Document Date of Birth:

Visa Number:

SEVIS ID:

Country of Passport Issuance:

Section Code: \*  
- Select -

PRUCOL Reason:

Country of Citizenship: \*  
- Select -

A Number:

Issue Date:

Expiration Date:

Adjustment Date:

Five Year Bar Admin Verification:

Verified: \*  
Pending View

Steps To Clear Alert

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**

Screenshot

The screenshot shows the CalSAWS web application interface. At the top, there's a dark blue header 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 (highlighted with a red arrow and a yellow circle labeled '1'), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tool. The main content area is divided into two columns. The left column has a 'Customer Information' section with a 'Case Number' input field and a 'Go' button, and a 'Person Search' section with a list of filters: Non Financial, Financial, Verifications (highlighted with a red arrow and a yellow circle labeled '3'), MC 355, and EBT Account List. The right column shows a 'Search Results' section with a list of filters: Workload Inventory, Case Summary, Customer Information (highlighted with a red arrow and a yellow circle labeled '2'), Reporting, Distributed Documents, Customer Schedule, and Courtesy Month. Below this is a 'Display From' to 'To' range with calendar icons and a 'View' button. At the bottom, there's a 'Search Address' button and a table header with columns for Address, Begin Date, and End Date.

Steps To Clear Alert

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

Verification List

\*- Indicates required fields

Status: \*  
Pending

From:

To:

Continue

View

Search Results Summary

Results 1 - 8 of 8

Add

Type	Name	Request Date	Due Date	Postponed ES	
<input type="checkbox"/> Name/Identity		01/07/14	01/17/14	<div>PostponeVerify</div>	<div>EditView History</div>
<input type="checkbox"/> SSN		01/07/14	02/06/14	<div>PostponeVerify</div>	<div>EditView History</div>
<input type="checkbox"/> Date of Birth		01/07/14	04/07/14	<div>PostponeVerify</div>	<div>EditView History</div>

Page 17

Steps To Clear Alert

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

Screenshot

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog O

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Toc

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Run EDBC

\*- Indicates required fields

Benefit Processing Range:

Begin Month: \*End Month: \*

07/202207/2022

Change Reason

Run EDBC

Cancel

Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	Medi-Cal	Active		
<input checked="" type="checkbox"/>	CalWORKs	Active		
<input checked="" type="checkbox"/>	CalFresh	Active		

Change Reason

Run EDBC

Cancel

Page 18



Steps To Clear Alert

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.

Screenshot

The screenshot displays the CalSAWS application interface. The top navigation bar includes the CalSAWS logo, case information fields, and various utility links like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this, a secondary navigation bar shows 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 "EDBC List". On the left, there is a sidebar for "Customer Information" with a "Case Number:" field and a "Go" button. Below this is a list of navigation options: Person Search, Non Financial, Financial, Verifications, MC 355, EBT Account List, MAGI Verifications, MAGI Eligibility, Run EDBC (highlighted), Manual EDBC, Needs, and Service Arrangements.

The "EDBC List" section includes search filters: "Display by:" (Program), "Type Reason:", "Run Status:", "From:" (06/2022), and "To:" (07/2022). There are "Cancel" and "View" buttons. Below the filters is a "Search Results Summary" header indicating "Results 1 - 6 of 6".

The results are presented in a table with the following columns: Begin Month, End Month, Program, Type, Run Status, Auth Amount, Date Run, and EDBC Source. The table contains six rows of data. The last two rows, representing "CalFresh" and "Medi-Cal" programs for the month of 07/2022, are highlighted with a red border, indicating they are "Not Accepted".

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
03/2022		<a href="#">CalWORKs</a>	Regular	Accepted - Saved	925.00	02/04/2022	Conversion
03/2022		<a href="#">CalFresh</a>	Regular	Accepted - Saved	571.00	02/04/2022	Conversion
05/2022		<a href="#">Medi-Cal</a>	Regular	Accepted - Saved	Details	04/14/2022	Batch EDBC Rules
07/2022		<a href="#">CalWORKs</a>	Regular	Accepted - Saved	733.00	06/11/2022	Online EDBC Rules
07/2022		<a href="#">CalFresh</a>	Regular	Not Accepted	571.00	06/11/2022	Online EDBC Rules
07/2022		<a href="#">Medi-Cal</a>	Regular	Not Accepted	Details	06/11/2022	Online EDBC Rules

Steps To Clear Alert	Screenshot
<p>16 Users will be directed to a PDF preview of the NOA. Users will have the following options:</p> <ul style="list-style-type: none"><li>- <b>Append:</b> User can make limited edits to NOA if necessary</li><li>- <b>Save and Print Locally:</b> User will save NOA to the case and will need to manually print the NOA for distribution.</li><li>- <b>Save and Print Centrally:</b> User will save the NOA to the case and the NOA will be sent out by central printing during nightly batch.</li><li>- <b>Reject:</b> User will reject the NOA, the NOA will still display in the case as a rejected status</li><li>- <b>Cancel:</b> User can cancel, this will leave the NOA in a "pending review" status.</li></ul> <p>Select the appropriate status for the NOA. This will update the status in the <b>Distributed Document Search</b> page.</p> <p>Once the NOA are reviewed, accepted, and saved, journal the actions taken according to navigate back to the <b>Case Summary</b> page.</p> <p>Note: If the NOA is not reviewed, it will go out by way of an overnight batch process.</p>	



Steps To Clear Alert		Screenshot
17	<p>Journal the action taken according to county policy.</p> <p>The Yellow Banner will no longer appear on the case.</p> <p>The case review is complete!</p>	 <p>The screenshot shows the CalSAWS interface. At the top, there's a navigation bar with 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The 'Eligibility' tab is selected. On the left, there's a sidebar with a 'Case Summary' section containing links like 'Person Search', 'EBT Account Search', 'Application Registration', 'Case Summary' (highlighted), 'Contact', 'Authorized Representative', 'Application Questions', and 'Negative Action'. The main content area is titled 'Case Summary' and includes fields for 'Case Name' and 'County'. Below this is a 'Companion Cases' section with a table for 'Case Number' and 'Case Name', and an 'Add' button. At the bottom, there's a 'Display:' section with a date '07/01/2022' and a 'View' button. A large red text overlay reads 'Yellow Banner cleared!'.</p>