



## **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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**TABLE OF CONTENTS**

|          |                                     |          |
|----------|-------------------------------------|----------|
| <b>1</b> | <b>INTRODUCTION .....</b>           | <b>4</b> |
| <b>2</b> | <b>BACKGROUND .....</b>             | <b>5</b> |
| <b>3</b> | <b>IMPACT ANALYSIS.....</b>         | <b>6</b> |
| <b>4</b> | <b>CLEAN-UP INSTRUCTIONS .....</b>  | <b>7</b> |
| <b>5</b> | <b>ADDITIONAL INFORMATION .....</b> | <b>8</b> |

## 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. The form contains the following data:

|              |            |
|--------------|------------|
| Pay Code:    | Amount:    |
|              | 44.12      |
| Begin Month: | End Month: |
| 09/2008      | 09/2008    |

At the top right of the form are 'Edit' and 'Close' buttons. Below the form, it says 'Last Updated On 10/14/2021 12:00:00 AM By: 07' with another 'Edit' and 'Close' button. A status bar at the bottom states '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.