☐ **CalSAWS M&E**   ☒ **CalWIN Migration**

Distribution Date:	July 6, 2023
To:	PPOC.Alameda; PPOC.Fresno; PPOC.Sonoma; Consortium.RegionalManagers.All; Implementation.TOSS; Consortium.SectionDirectors
CIT Name:	**Wave 5: Yellow Banner Case Review Process**
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

☒ General
☐ Policy
  ☐ CW
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  ☐ MC
  ☐ CMSP
  ☐ FC/KG/AAP
  ☐ Child Care
  ☐ WtW
  ☐ Other Program(s)_____
☐ BenefitsCal   ☐ MyBCW
☐ Customer Correspondence
☐ Other_____

☐ Reports
  ☐ Fiscal
  ☐ Caseload Movement
  ☐ Management
☐ Fiscal
☐ Security
☐ Batch and Interfaces
☐ Imaging
☒ Migration
☒ Conversion
☐ Technical
☐ Training
☐ Help Desk

Description: (Including any step-by-step instructions)	**Purpose** The purpose of this CIT is to provide the Wave 5 CalWIN counties (Alameda, Fresno, and Solano) instructions on how to identify, prioritize, and review Yellow Banner Cases. **Background** During the conversion cutover from CalWIN to CalSAWS, CalSAWS will run Batch EDBC 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 the EDBC. If the EDBCs do **not** match, the case will be flagged with a yellow banner and the Batch EDBC is **not** saved. These flagged cases will require further case review by a County Worker to determine the difference in the EDBC results and make appropriate case updates to resolve the issue. Post Go-Live, CalSAWS Users from converting CalWIN Counties may see a yellow case banner on some of their active cases due to an EDBC Mismatch.

| Display:		
EBT Account List	02/18/2016 📅 View	
Issuance History		
Expungement History	▸ **Full Case Review is required, before EDBC is run and authorized. Please refer to the Manual Case Review Job Aid for instructions on how to proceed. Programs Affected: CalFresh.**	
Child Support Collections		
Time Limit Aid Summary		
Case Flag	▸ **Case Flags**	

The CalSAWS Project will provide a listing of impacted cases with the associated EDBC Mismatch Reason for each Wave 5 County, along with a guide on county actions that can be taken to clear the yellow banners.

Batch EDBC will not be run on these cases until the User performs the case review, takes appropriate action, and accepts and saves the EDBC. These cases will be identified via exception reports after each batch job.

Some Negative Action Batch jobs will still apply to these cases, as appropriate, and EDBC will be run and saved. A list of these Negative Action Batch jobs is highlighted in the Yellow Banner Case Review Report Mismatch Reasons, Priorities and Scenarios Guide.

Throughout the year, CalSAWS will run various Cost of Living Adjustment (COLA) batch jobs. A review of cases with Yellow Banners should be performed **before** the next COLA run. If the review is **not** complete prior to the COLA run, CalSAWS will not automatically apply the COLA increase. The worker will have to apply the COLA increase **manually**. A separate CIT will be sent to the counties after each COLA run identifying these cases.

CalSAWS counties will have the ability to track the number of cases with Yellow Banners using the Reporting Dashboard introduced in **CIT 0316-22: CA-243555 CalSAWS Converted Case Review Dashboard.** Below is an example of the Dashboard that CalSAWS counties can access.
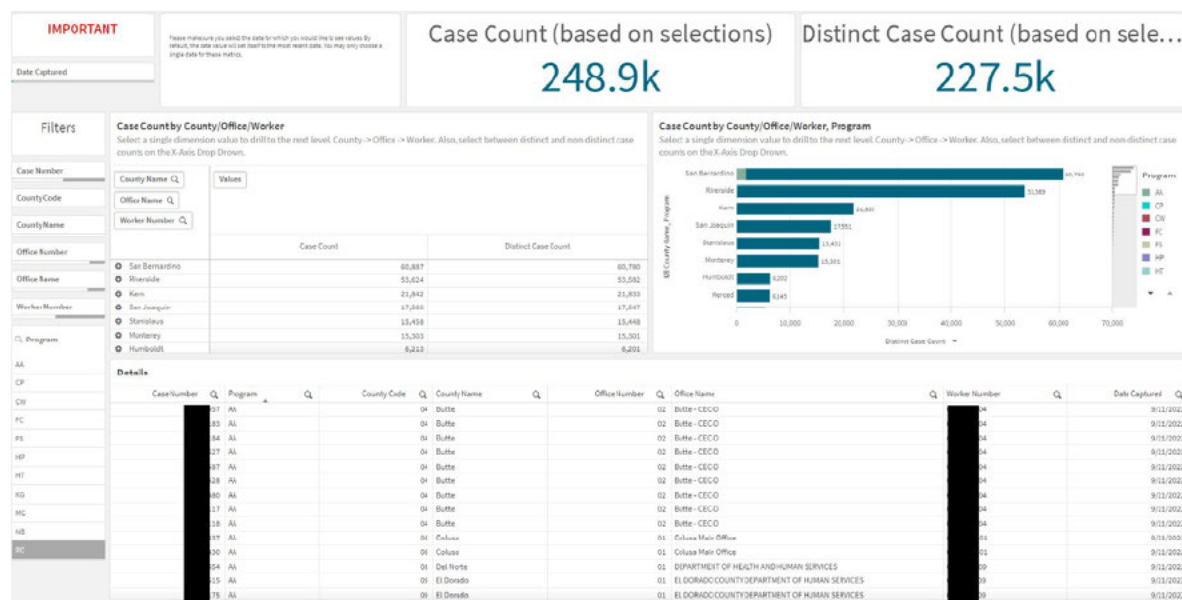
Additional Information

The CalSAWS team created guides for each of the EDBC Mismatch reasons listed in the chart below. The guides will further help the CalWIN counties navigate through CalSAWS to clear yellow banners post Go-Live.

Each Mismatch Reason is assigned a priority of 1, 2, or 3. Cases labeled with a priority of 1 being the highest priority.

The Yellow Banner cases should be cleared based on priority, with the highest priority as follows:

- Cases that resulted in discontinuance or failure,
- Recoupment mismatch,
- Person status mismatch,
- Case Program not Authorized.

Mismatch Reason	Description	Priority
Program Discontinued	When EDBC is run in CalSAWS, active Programs in the CalWIN System are resulting in a Program Discontinuance in CalSAWS.	1
Recoupment Mismatch	When EDBC is run in CalSAWS, the Recoupment amount in CalSAWS differs from what was determined in the CalWIN System.	1
Program Person Status Mismatch	When EDBC is run in CalSAWS, the Program Person Status does not match what was determined in the CalWIN System.	1
Cash Program not Authorized	When EDBC is run in CalSAWS, the Cash Program fails due to a mismatch; therefore, the associated CalFresh (CF) Program also fails.	1
Program Person Role Mismatch	When EDBC is run in CalSAWS, the Program Person Roles are mismatched (such as MEM, UP, FRE, or FRI) between the converted CalWIN EDBC and the CalSAWS run EDBC.	2
Benefit Amount Mismatch	When EDBC is run in CalSAWS, the Benefit Amount does not match with what previously determined in the CalWIN System.	3
Aid-Code Mismatch	When EDBC is run in CalSAWS, the Aid Code does not match with what was determined in the CalWIN System.	3

Prior Or Current EDBC Not Found	EDBC run in CalSAWS is unsuccessful due to no Prior or Current EDBC result to compare against in the CalWIN System.	3
MAGI Determination Pending	Based off the last CalWIN MAGI eligibility determination on the DER, the EDBC run in CalSAWS results in MAGI Determination Pending for an individual(s).	3
Exclusion/Exception	EDBC results are not matching based on one of the following reasons: • There is no active or pending person for this program. • Exception • At least one day in the child placement has a missing rate. • Program does not have at least one active person for the benefit month. • Overridden Program Case • Overdue or Incomplete Periodic Report • Overdue or Incomplete RE Packet • Soft Paused • Medi-Cal person on 38 aid code • Medi-Cal person on 4M Aid Code • Requested MC Type is FFY with a person 26 years of age or older. • Requested Medi-Cal types must apply to all or none of the household members. • The following information is missing: KinGap Dates • County Arrival Date is missing for the applicant (GA Only)	3
Full Case Review	EDBC run in CalSAWS is resulting in an uncategorized mismatch reason.	3

NOTE: *All Foster Care, Kin-GAP, and AAP related items may be found under the Appendix: **Required Actions for Foster Care, Kin-Gap, and Adoption Assistance Program***

County Action

Prior to Go-Live, Wave 5 Counties will attend a Yellow Banner Process Overview which will take place during the **July Wave 5 & 6 CNC Meeting** on **07/11/2023** from **1:30 – 3:00 pm**. Attendance should include PPOC, IPOC, and CNCs'. The meeting will be recorded, and the recording link will be sent to Wave 5 counties.

After Go-Live, a list will be provided to counties identifying cases with an EDBC Mismatch that will need to be reviewed and authorized to clear the yellow banner from the Case Summary page. Taking this step will allow upcoming automated actions, batch processes, and COLA runs to apply to cases on schedule.

The Yellow Banner scenarios are designed to be shared in multiple ways such as:
- Printed and posted in the office,
- Posted on internal county sites (SharePoint, etc.),
- Displayed during meetings/presentations.

IPOCs/PPOCs should distribute the CIT and guides to county staff.

The Yellow Banner Guides can be found on the Web Portal here:

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If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.

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Attachments:	CIT 0248-23 Wave 5 Yellow Banner Case Review Guide and Scenarios • Yellow Banner Case Review Mismatch Scenario Overview • Yellow Banner – Aid Code Mismatch • Yellow Banner – Program Discontinued • Yellow Banner – Recoupment Mismatch • Yellow Banner – Benefit Amount Mismatch • Yellow Banner – Cash Program Not Authorized • Yellow Banner – MAGI Determination Pending • Yellow Banner – Prior or Current EDBC Not Found • Yellow Banner – Program Person Role Mismatch • Yellow Banner – Program Person Status Mismatch • Yellow Banner – Full Case Review – Medi-Cal Only • Yellow Banner – Full Case Review – CW/CF • Yellow Banner – Appendix - Required Actions for Foster Care, Kin-Gap, and Adoption Assistance Program • Yellow Banner – Exclusion/Exception
Web Portal Link:	██████ OR You may also retrieve the CIT document and attachments by following these steps: 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2023" folder. 4. Click on the appropriate CIT # folder.