Benefit Amount Mismatch

Priority Level: 3

Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care, Medi-Cal

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, if the last saved CalWIN EDBC benefit result that was determined in the CalWIN system does not match the converted CalSAWS EDBC benefit result. Run EDBC in CalSAWS to find the benefit amount mismatches and compare to the last saved converted CalWIN EDBC. Based on the differences, Users will need to verify the new CalSAWS results, update the data collection records, if applicable, take action based on county policy and authorize the EDBC results.

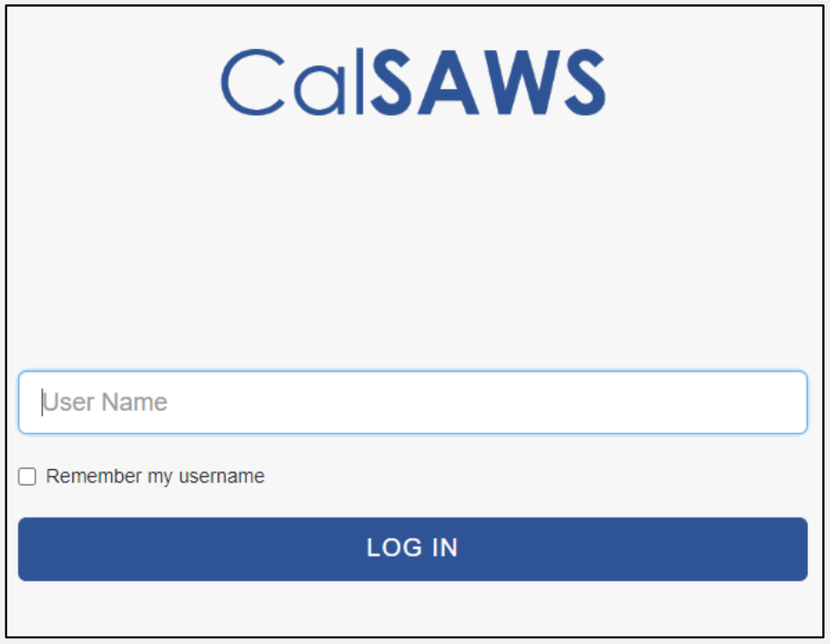
These cases will be identified in the **Conversion EDBC Case Review Report** as follows:

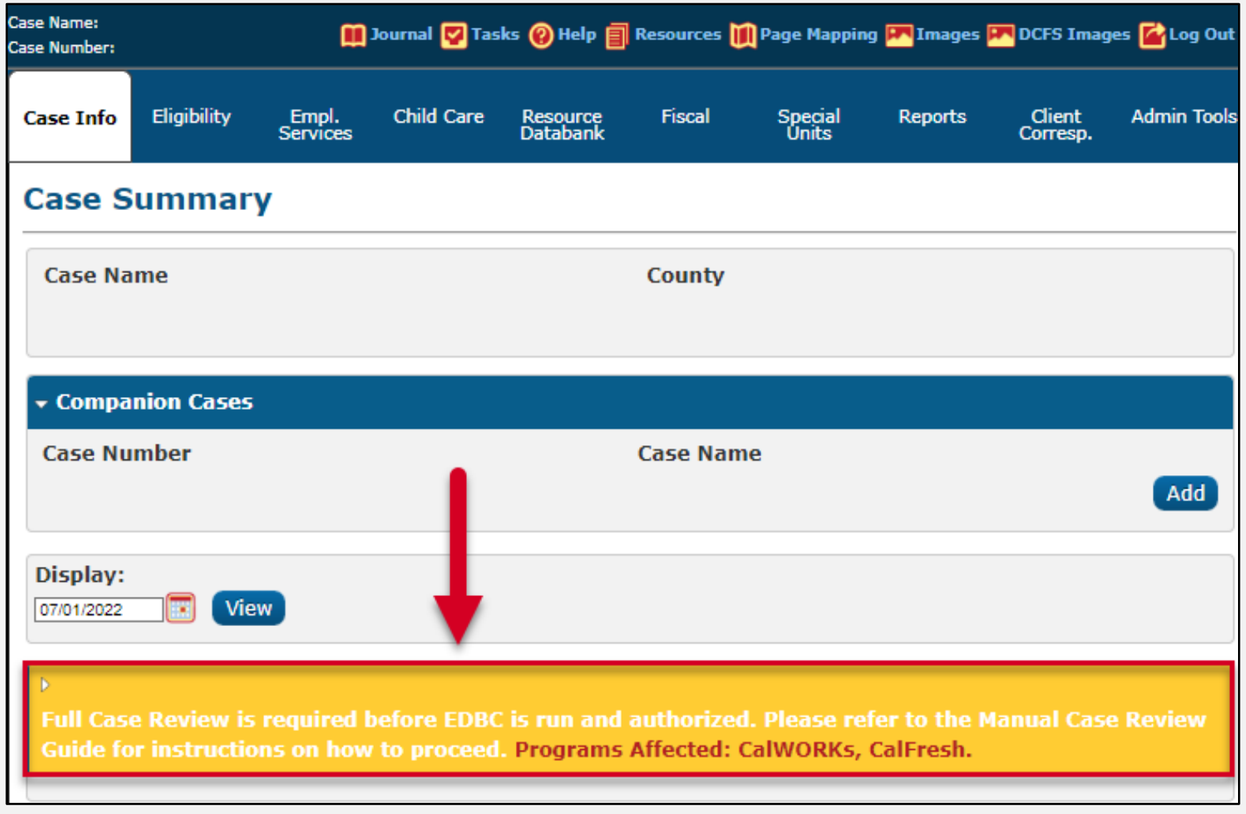
COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY	SSA_INCOME	SSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalFresh	Benefit Amount Mismatch	11/30/2022		3		

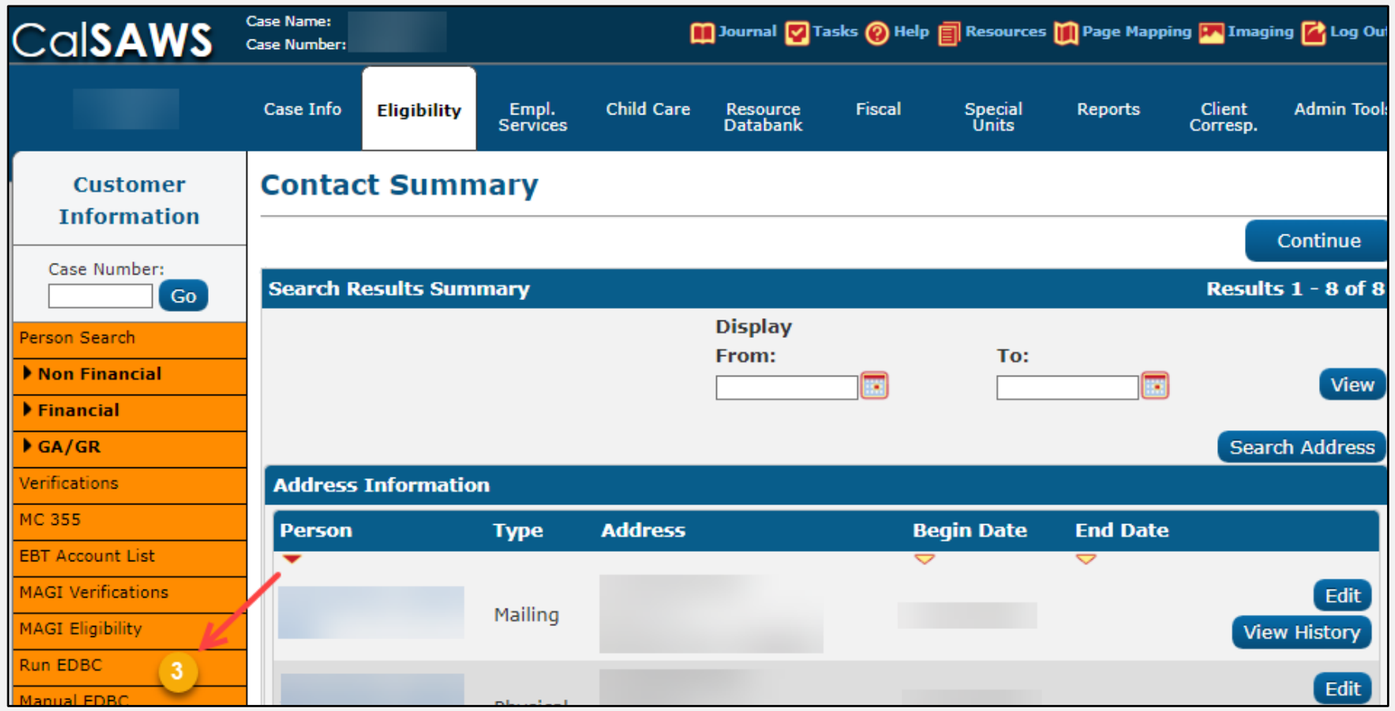
Note: The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided below are intended to direct users to the most impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all the information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

Example

Benefit Amount Mismatch

	Steps To Clear Alert	Screenshot
1	Log in to CalSAWS by entering your Username and Password	

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

Steps To Clear Alert	Screenshot
3 On the Case Summary Page: 1. Click on the **Eligibility** tab on the Global Navigator 2. Click on the **Customer Information** link on the Local Navigator 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**

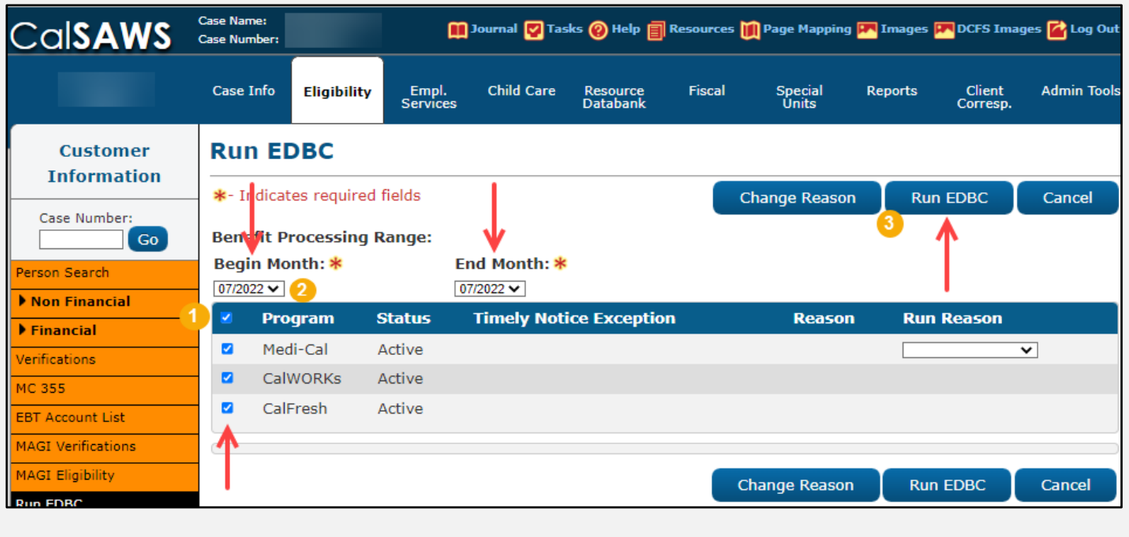
⚠ Ensure all programs on a case are selected when running EDBC as each program can have its own EDBC Mismatch reason. EDBC Mismatch follows program hierarchy and requires all programs be run at the same time to clear all EDBC Mismatch reasons on a case.

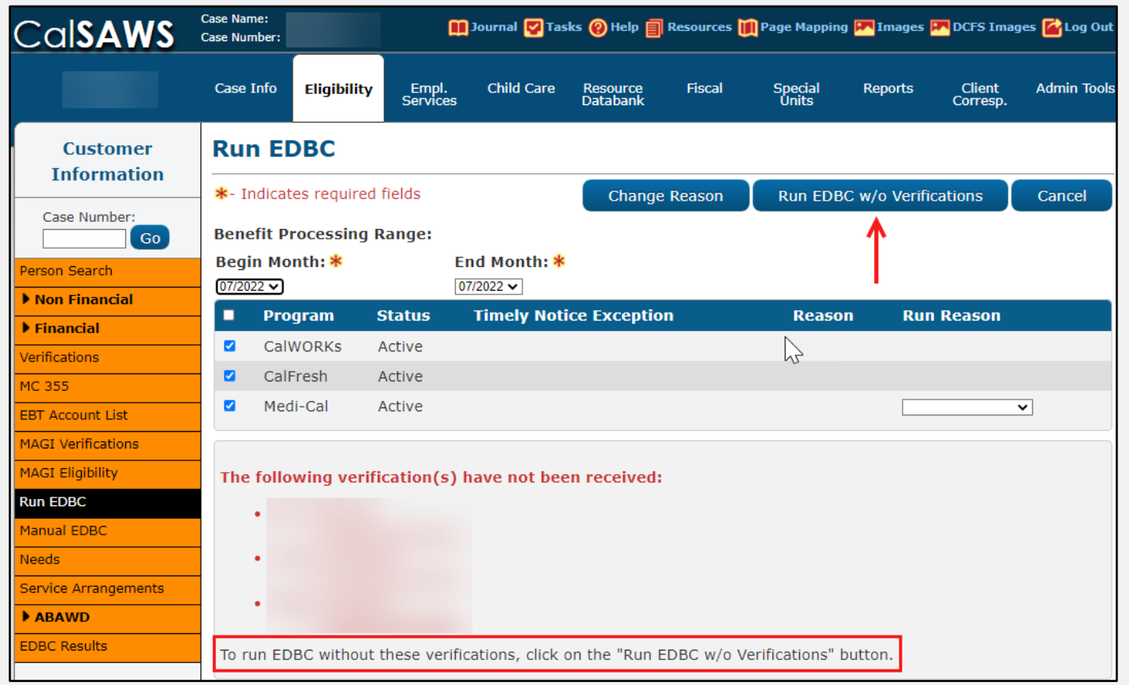
When running EDBC, there are two types of validations that a User may experience if eligibility criteria is missing or pending.

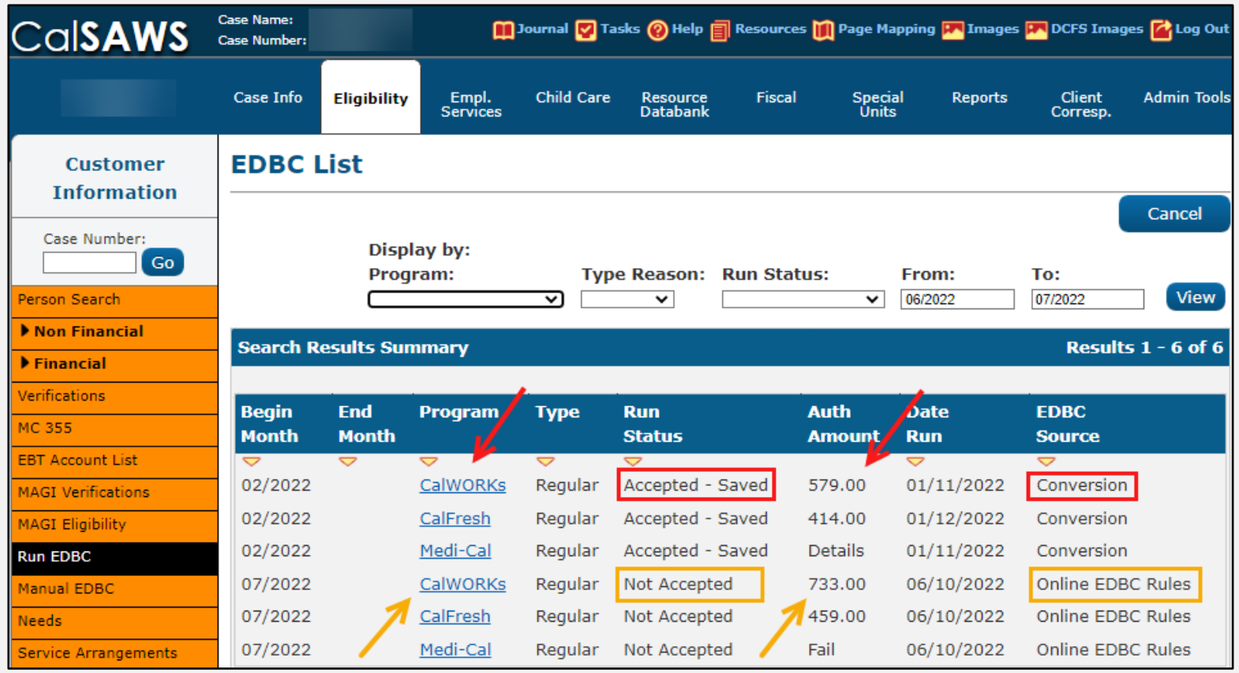
When experiencing a **Hard Validation**, EDBC cannot be run without the appropriate updates made to the data collection pages.

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.

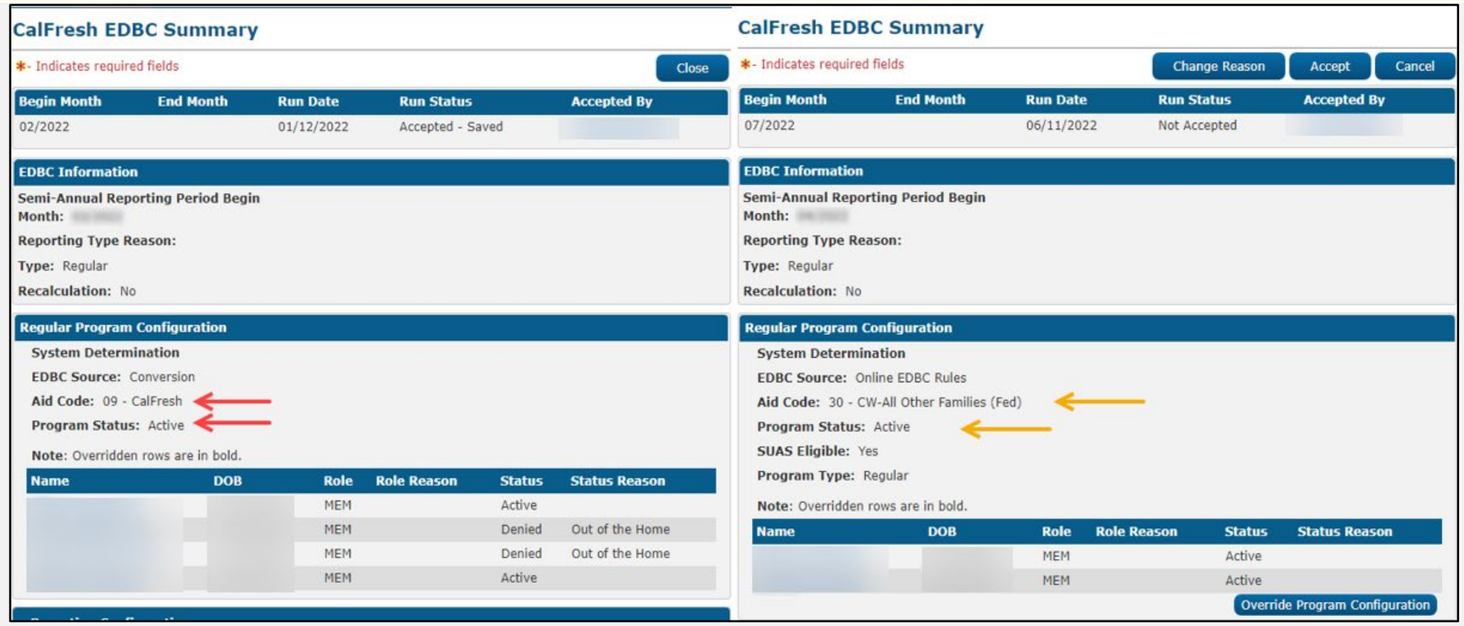




Steps To Clear Alert	Screenshot
5 Compare the benefit amount mismatch details with the last CalWIN **Conversion** EDBC run. Users will need to identify any mismatches in the following areas: income, household size, living expenses, Other Program Assistance (OPA), Non-compliance/Sanctions/Penalties, etc. Review for any discrepancies within data collection pages that could potentially change the last authorized Benefit Issuance Amount. In this example, we will review the Converted CalWORKs Budget by first clicking the **CalWORKs link for 02/2022** and compare it against the new CalWORKs Budget by clicking the **CalWORKs link for 7/2022.**	

Steps To Clear Alert	Screenshot
In the CalWORKs Budget block, staff can quickly review, compare, and find any **Unearned Income**, **Earned Income** and **MAP Family Unit Size** discrepancies. Users can click on the hyperlinks to view income used in the EDBC budget. In the side-by-side example to the right, the ***biggest*** discrepancy between the converted CalWORKs Budget and the newly run 07/2022 CalWORKs Budget is in **MAP Family Unit Size.** Staff should begin by reviewing all reported and verified household changes in the case. **Note:** This side-by-side comparison view is for example purposes only and is not a default view within CalSAWS.	

CalWORKs Budget	Regular	CalWORKs Budget	Regular
Unearned Income	$ 0.00	Unearned Income	$ 0.00
Unearned Income Disregards	- 0.00	Unearned Income Disregards	- 0.00
Net Unearned Income	= 0.00	Net Unearned Income	= 0.00
Earned Income	$ 0.00	Earned Income	$ 0.00
Earned Income Disregards	- 0.00	Earned Income Disregards	- 0.00
Net Earned Income	= 0.00	Net Earned Income	= 0.00
Total Net Nonexempt Income	$	Total Net Nonexempt Income	$ 0.00
MAP Family Unit Size	1	MAP Family Unit Size	2
Family MAP	$ 579.00	Family MAP	$ 733.00
Family MAP Test	Pass	Family MAP Test	Pass
Family Special Needs	$ 0.00	Family Special Needs	$ 0.00
Potential Grant	$ 579.00	Potential Grant	$ 733.00
Assistance Unit Size	1	Assistance Unit Size	2
Assistance Unit MAP	$	Assistance Unit MAP	$ 733.00
Assistance Unit Special Needs	$ 0.00	Assistance Unit Special Needs	$ 0.00
Aid Payment	$ 579.00	Aid Payment	$ 733.00

Steps To Clear Alert	Screenshot
The screenshots to the right display the CalFresh EDBC Summary. Staff can view: • Semi-Annual Reporting Period Begin Month • System Determination EDBC Source • Aid Code • Program Status ★ **Note:** This side-by-side comparison view is for example purposes only and is not a default view within CalSAWS.	

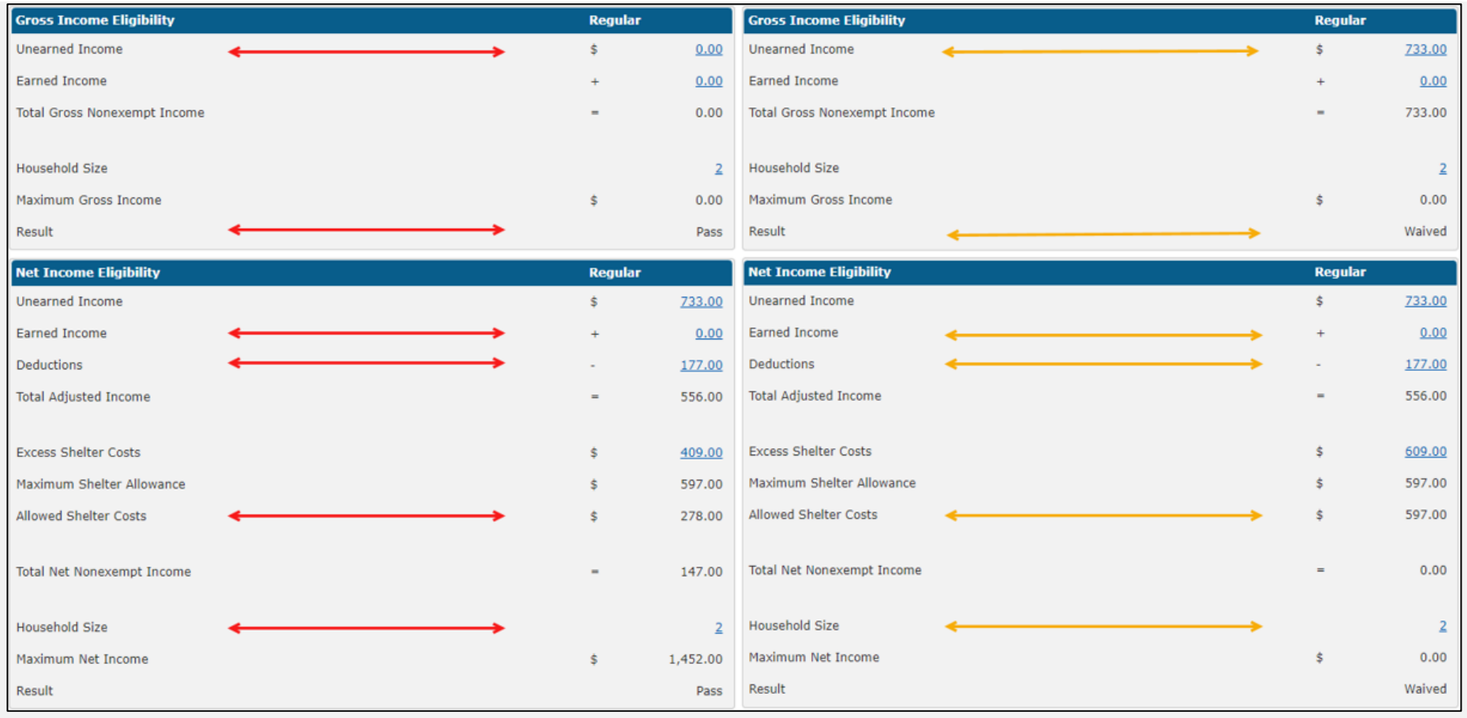
Steps To Clear Alert	Screenshot

In the Gross Income Eligibility block, staff can quickly review, compare, and find any **Unearned Income**, **Earned Income** and **Household size** discrepancies.

In the Net Income Eligibility block, staff can quickly review, compare, and find any **Excess Shelter Costs and Deduction** discrepancies.

Staff should review all reported and verified **Earned** and **Unearned Income** in the case.

Note: This side-by-side comparison view is for example purposes only and is not a default view within CalSAWS.

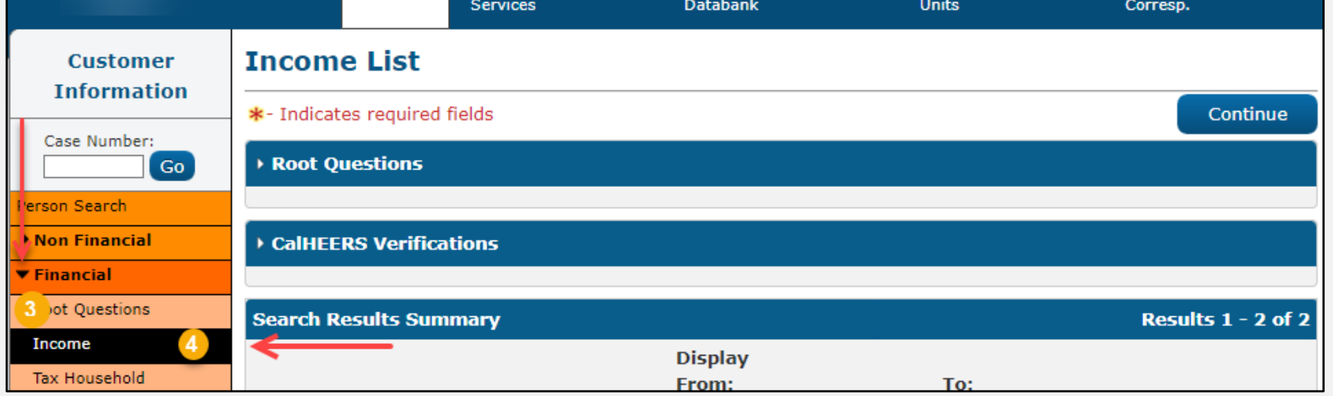


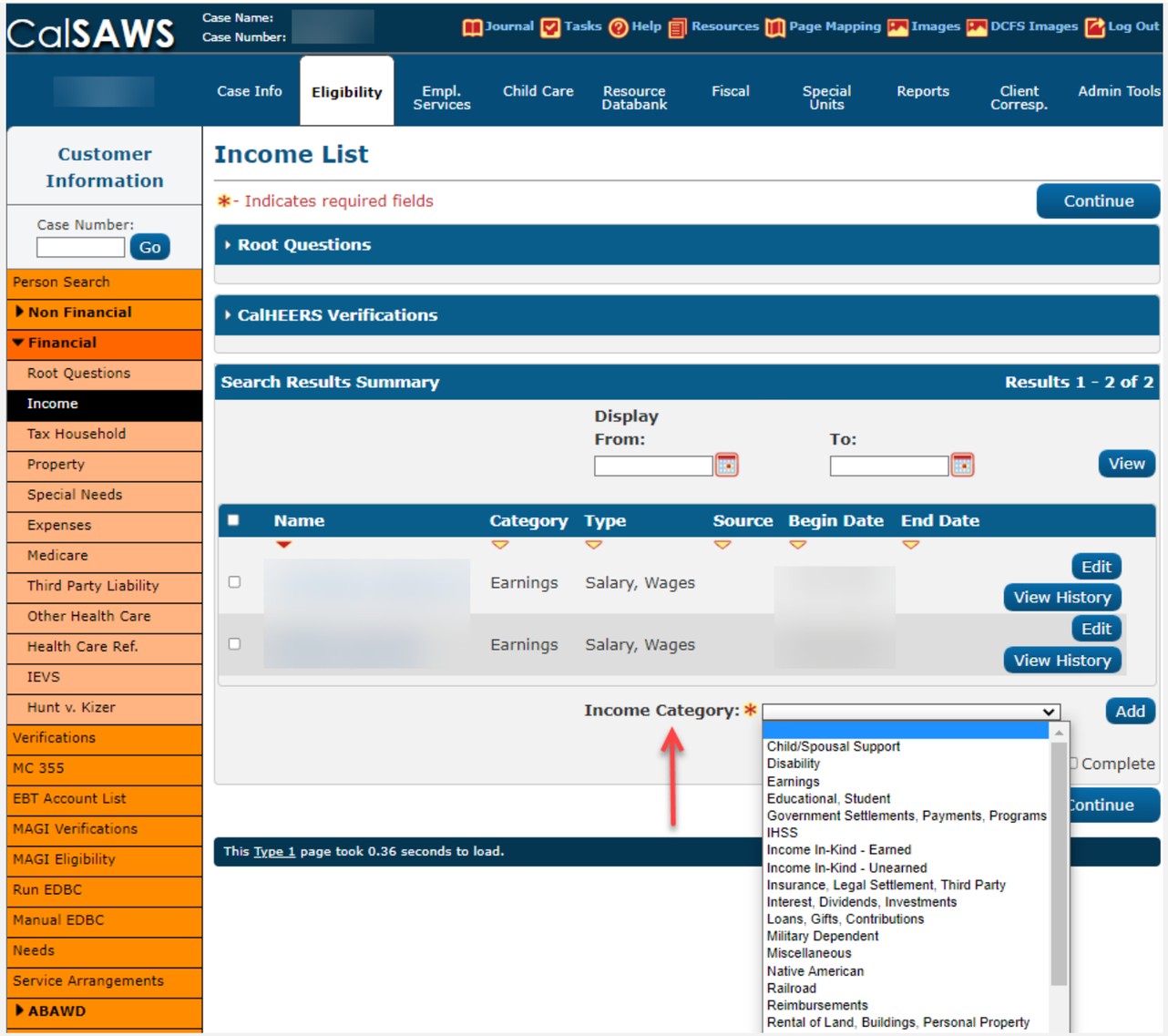
Gross Income Eligibility		Regular
Unearned Income	$	0.00
Earned Income	+	0.00
Total Gross Nonexempt Income	=	0.00
Household Size		2
Maximum Gross Income	$	0.00
Result		Pass

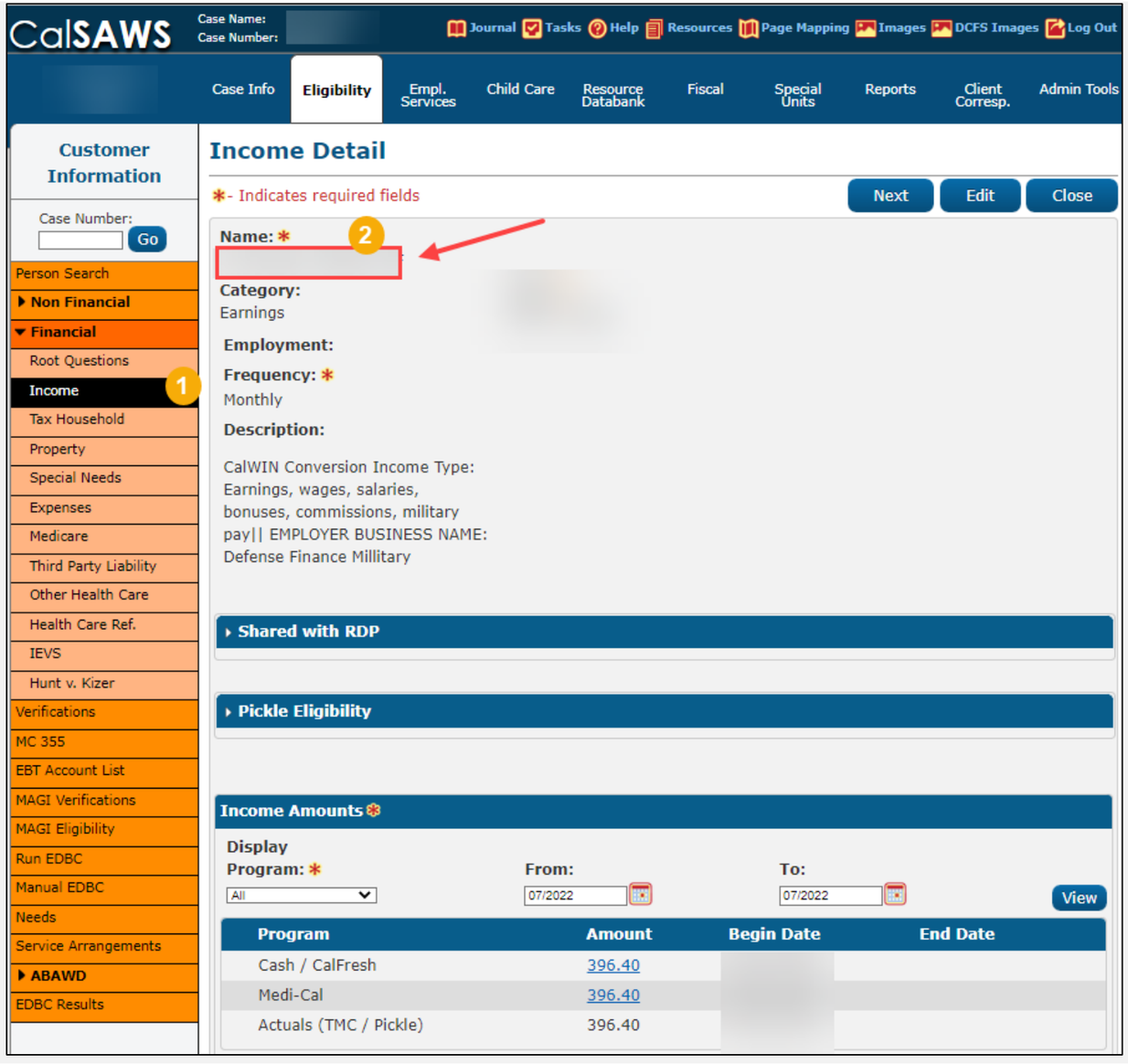
Gross Income Eligibility		Regular
Unearned Income	$	733.00
Earned Income	+	0.00
Total Gross Nonexempt Income	=	733.00
Household Size		2
Maximum Gross Income	$	0.00
Result		Waived

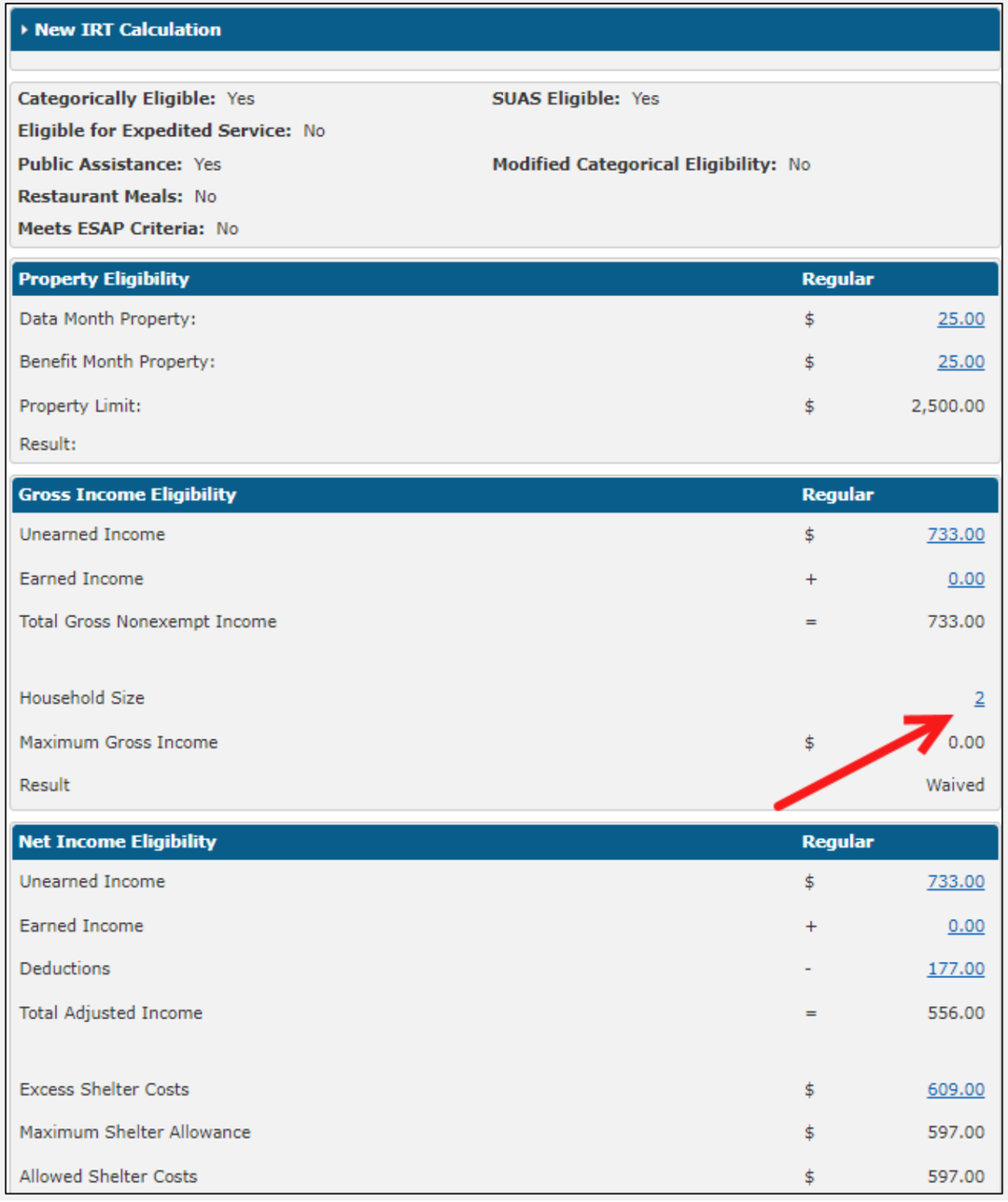
Net Income Eligibility		Regular
Unearned Income	$	733.00
Earned Income	+	0.00
Deductions	-	177.00
Total Adjusted Income	=	556.00
Excess Shelter Costs	$	409.00
Maximum Shelter Allowance	$	597.00
Allowed Shelter Costs	$	278.00
Total Net Nonexempt Income	=	147.00
Household Size		2
Maximum Net Income	$	1,452.00
Result		Pass

Net Income Eligibility		Regular
Unearned Income	$	733.00
Earned Income	+	0.00
Deductions	-	177.00
Total Adjusted Income	=	556.00
Excess Shelter Costs	$	609.00
Maximum Shelter Allowance	$	597.00
Allowed Shelter Costs	$	597.00
Total Net Nonexempt Income	=	0.00
Household Size		2
Maximum Net Income	$	0.00
Result		Waived

Steps To Clear Alert	Screenshot
6 For income discrepancies and/or review: 1. Click on the **Eligibility** tab located on the **Global navigation** bar. 2. Select **Customer Information** from the **Local** navigator. 3. To expand the **Financial** section, click on the carrot in the **Task** navigation. 4. Click on the **Income** link on the **Task** navigation bar.	 

Steps To Clear Alert	Screenshot
For Income Categories, Income Types, Adding, Editing, Viewing, or Removing all income for all persons associated to the case, refer to Job Aid: **JA Income Categories and Types in the System.** Additional **Income Quick Guides** available in LMS and **Job Aids** available in CalSAWS: **CalSAWS Quick Guide: Potentially Available Income** (needs updating, contains C-IV references) **CalSAWS Quick Guide: Sponsorship and Deemed Income** (needs updating, contains C-IV references) **JA Foster Care Income and Property Detail Page** **JA Medi-Cal – Income In-Kind – Unearned** **JA SSIAP – SSI (Disability)**	

Steps To Clear Alert	Screenshot
In Benefit Mismatch scenarios, there may be an increase in earned/unearned income. To review or correct any Income discrepancies, navigate to the **Income List Page** under the Financial tab: 1. Navigate from the **Income List Page** 2. Click on the blue, hyperlinked **Customer name**. Review income amounts, active/discontinued Programs, Begin and End Dates. Correct any discrepancies, if needed.	

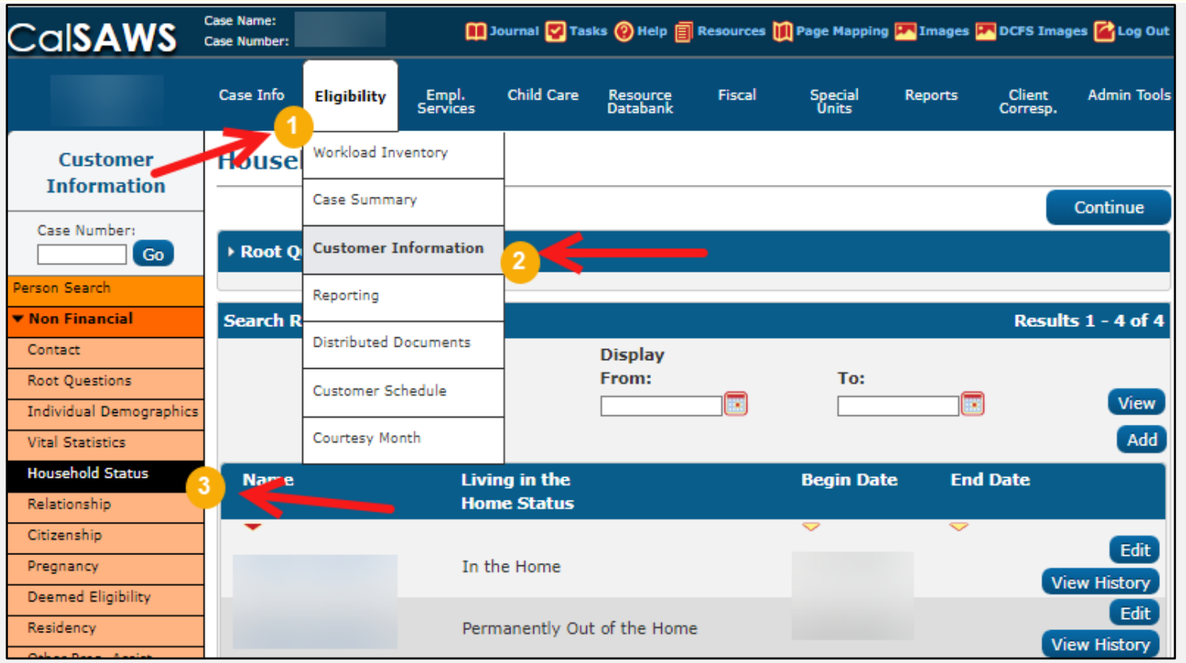
7	Steps for Household composition discrepancies: Review the **Gross Income Eligibility block** and correct any **Household size** discrepancies in the case, if applicable. (*Refer back to **Step 5** to find Household Size in the Gross Income Eligibility block*) Review all active Household members within the Program Configuration section of the budget. Ensure appropriate household members are **all listed** and show **active** on the case.	

Steps To Clear Alert	Screenshot

To add, edit or view household status information for all individuals associated to the case:

1. Place the cursor over **Eligibility** on the **Global navigation bar**.
2. Select **Customer Information** from the **Local navigator.**
3. Click on the **Household Status link** on the **Task navigation bar** to access the **Household Status List** page.

Refer to the following Job Aid available via the **Help Icon** on the Utility Navigator: **Household Status Detail**



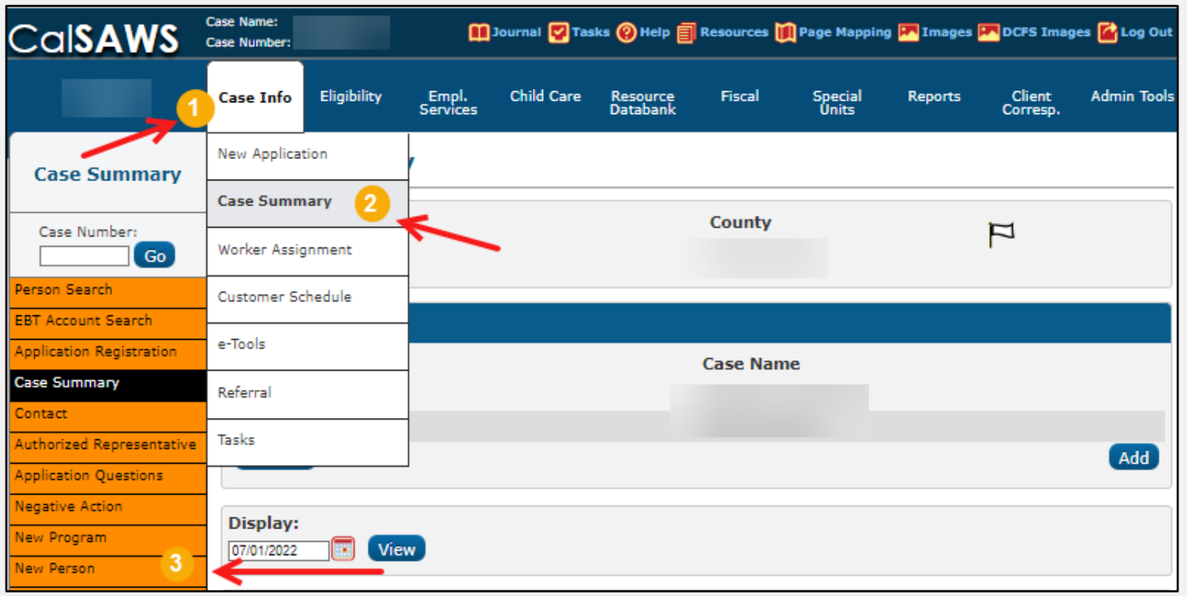
To add a person that exists in CalSAWS/to add a person that does not exist in CalSAWS:

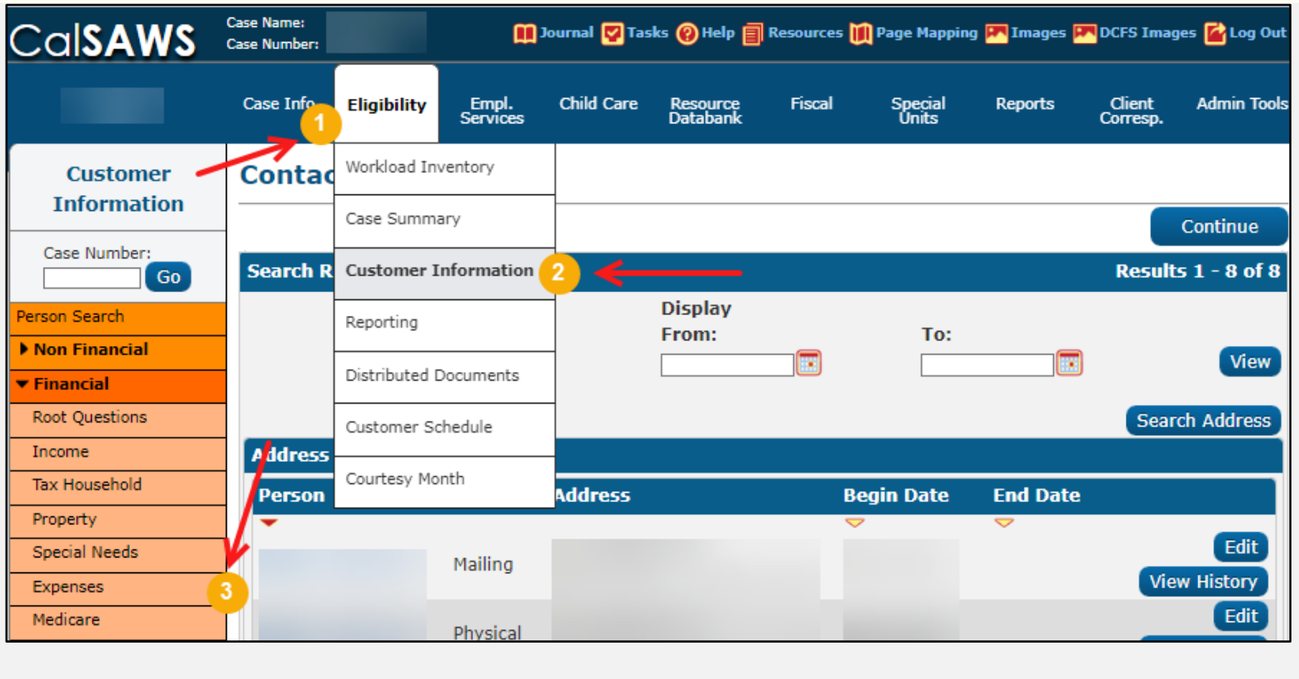
1. Place the cursor over **Case Info** on the **Global** navigation bar.
2. Select **Case Summary** from the **Local** navigator.
3. Expand the **New Person** link on the **Task** navigation bar.

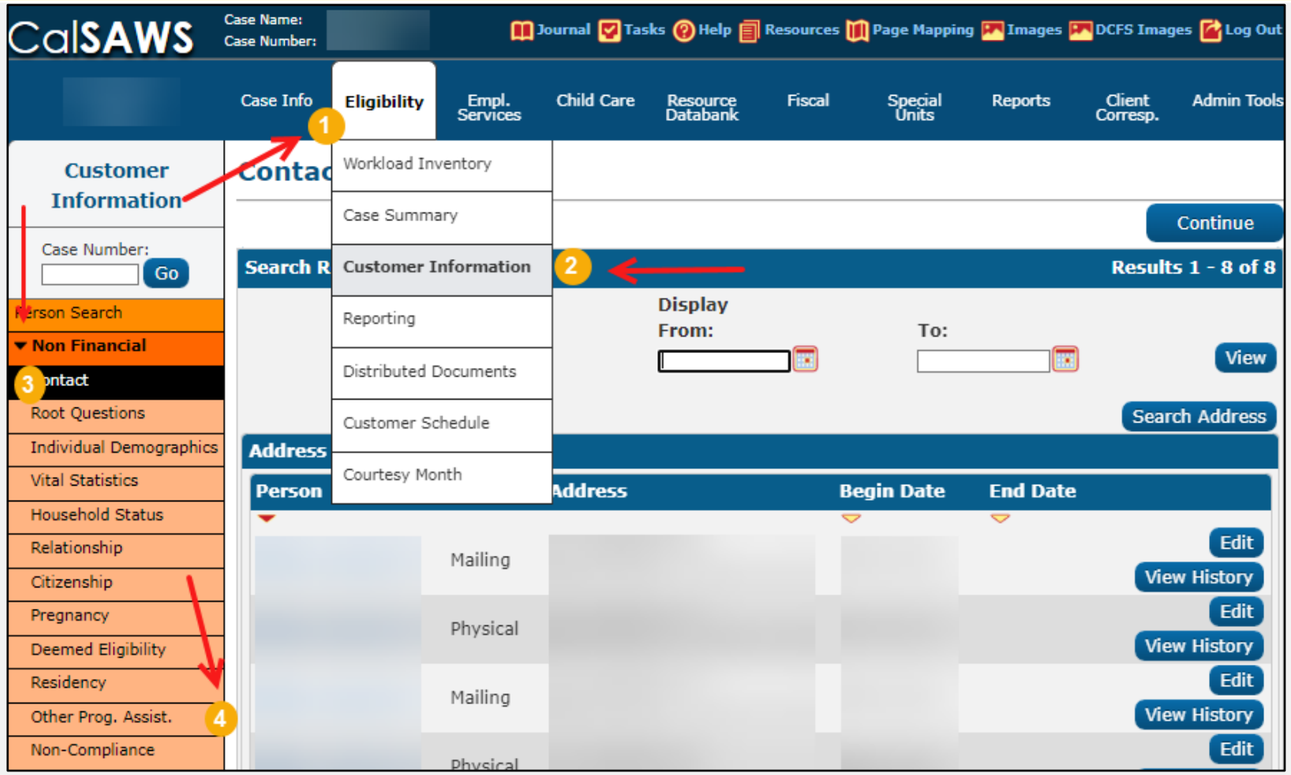
Refer to the following Job Aid available via the **Help Icon** on the Utility Navigator: **JA Add a Person to an Existing Case and Existing Program**

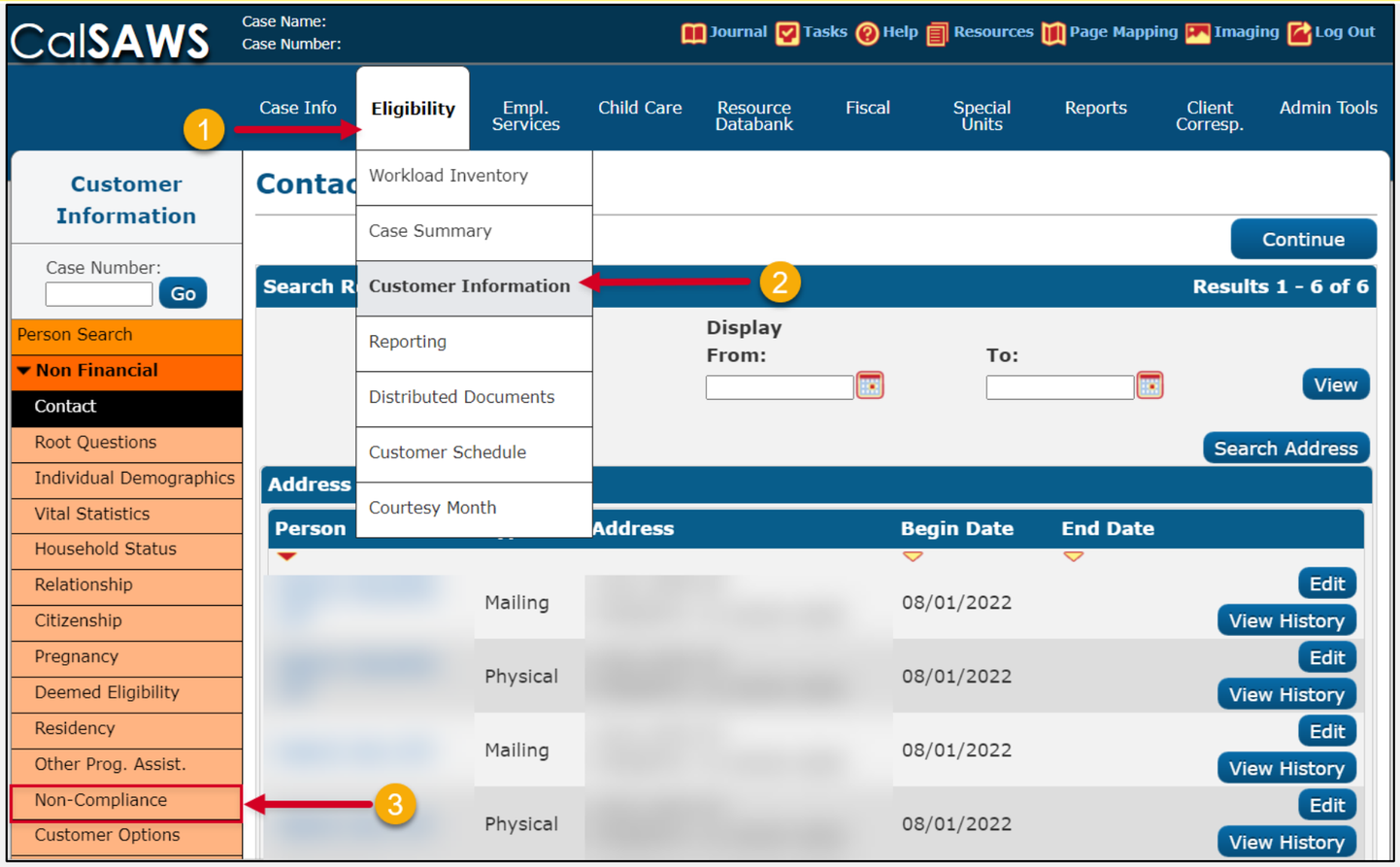
Additional **Quick Guides** available in LMS **and Job Aids** available in CalSAWS:

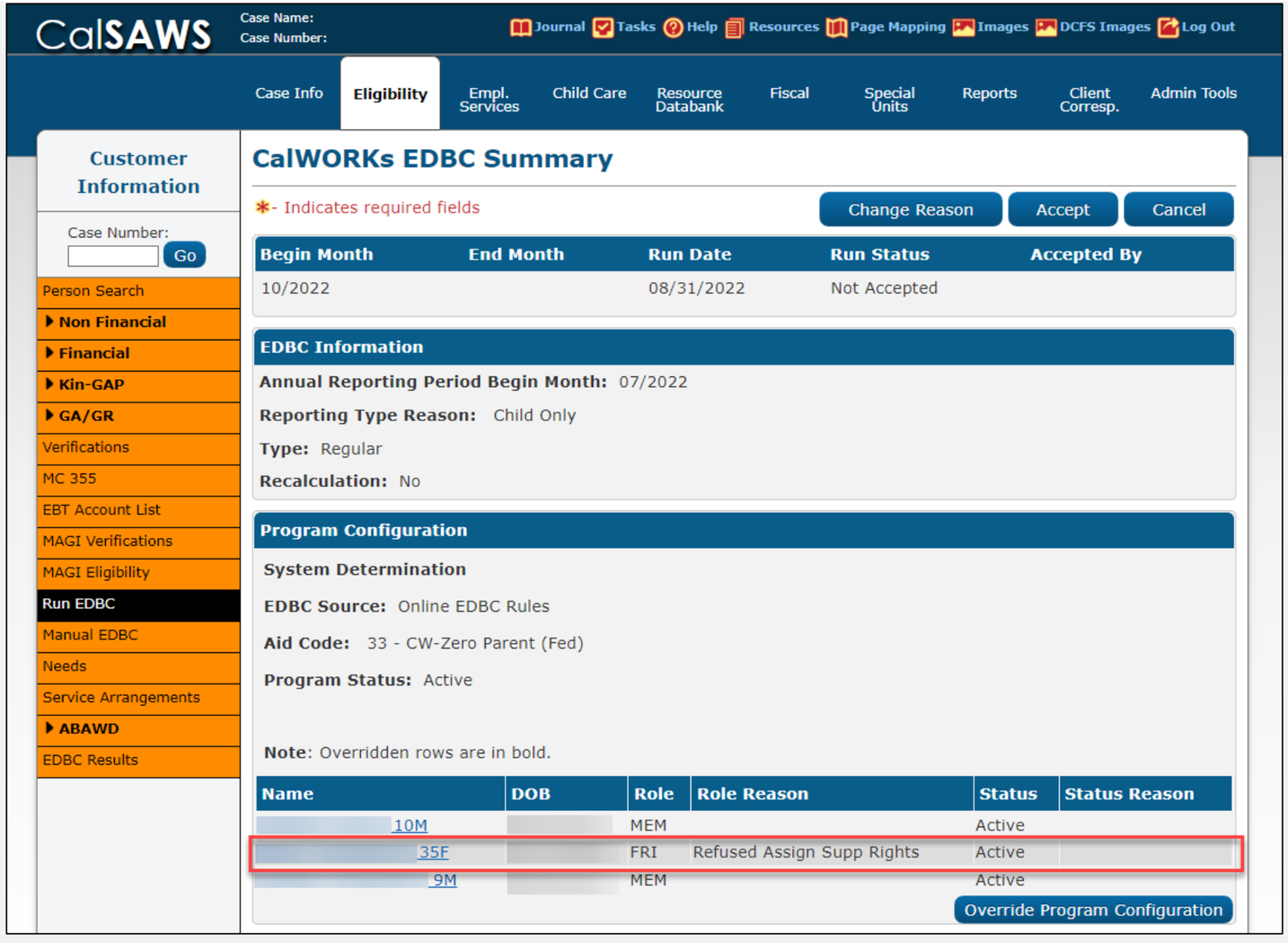
Duplicate Persons (CIN) – Identify and Document

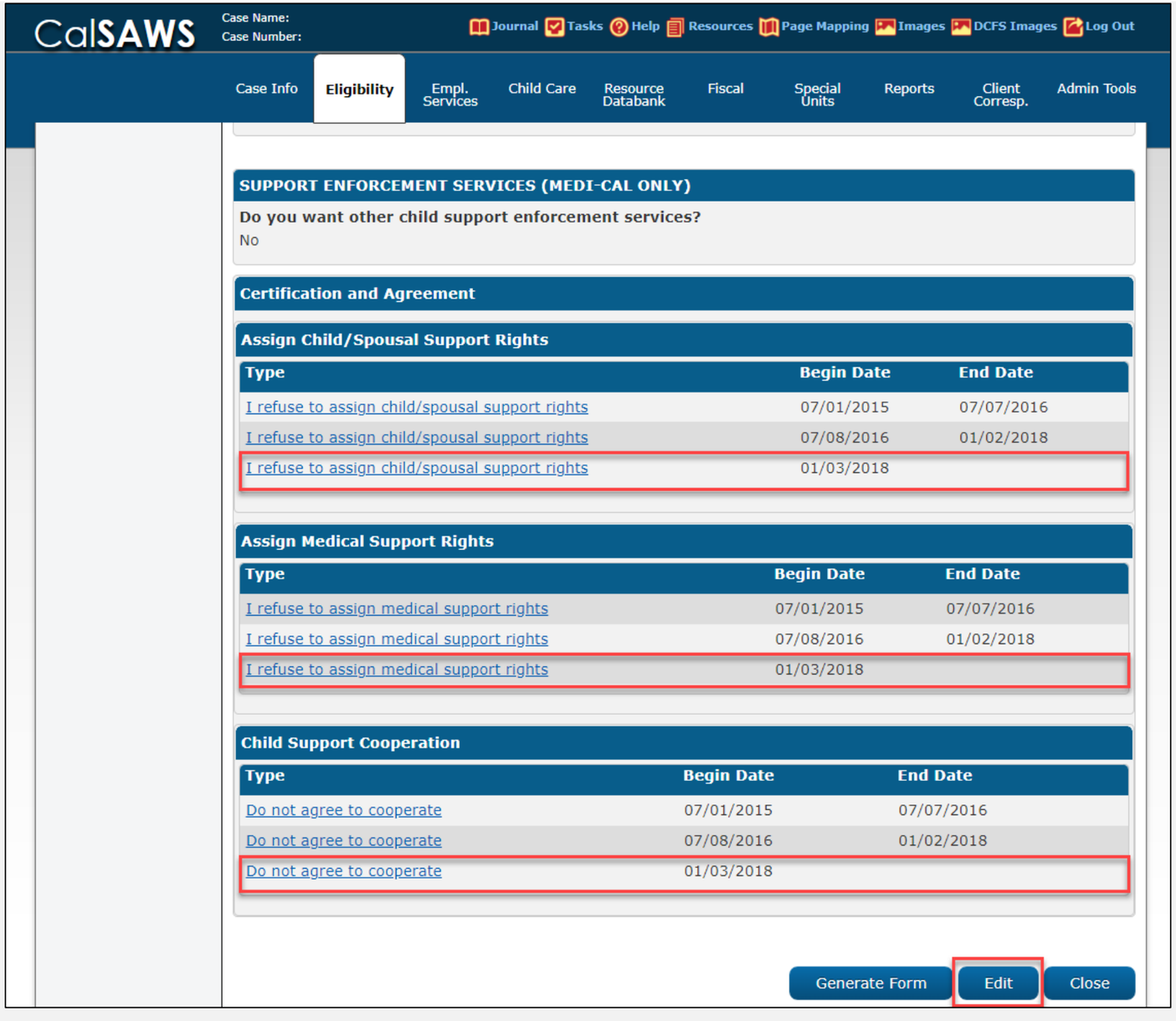


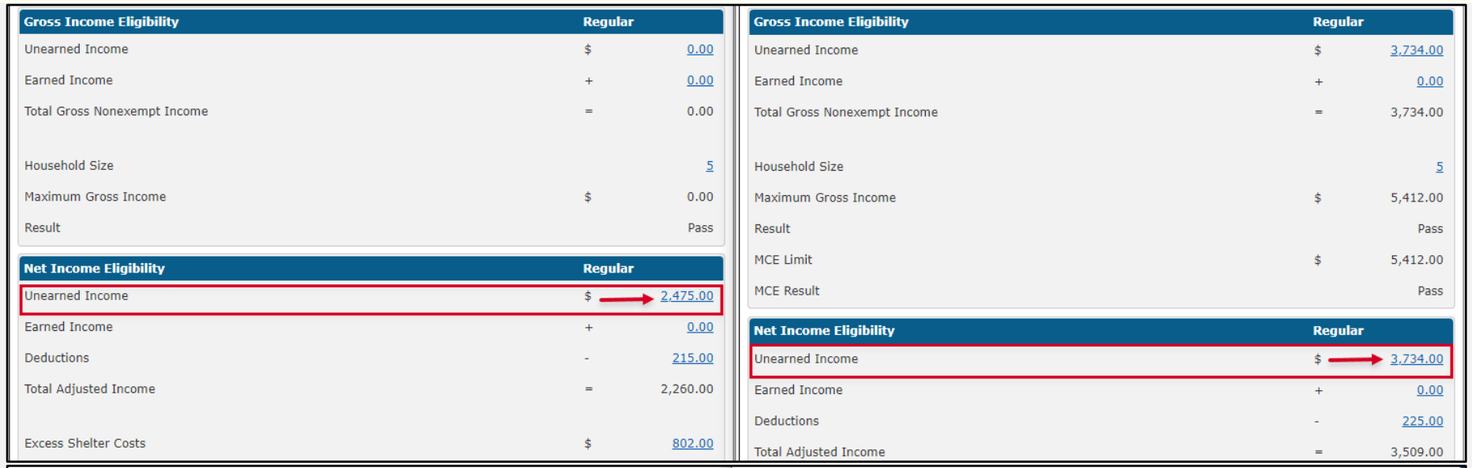
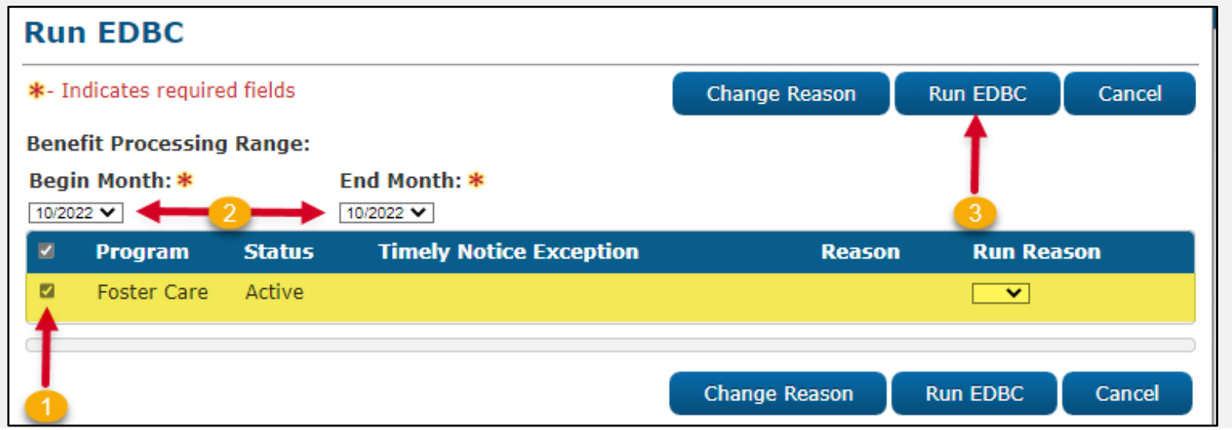
Steps To Clear Alert		Screenshot
8	To correct any Living Expense discrepancies, navigate to the **Expense Amount Detail** page. 1. Click on the **Eligibility** tab on the **Global navigation** bar. 2. Select **Customer Information** from the **Local** navigator to expand the **Financial** link on the **Task** navigation bar. 3. Click on the **Expenses** link. To view, add, or edit the details of an expense, refer to the following Job Aid located in the **Help Icon** on the Utility Navigator: **JA Expense Management** • Expense Categories • Expense List Page • Complete Expense Detail Page • Add/Edit Self-Employment Expense • Add/Edit SUA/LUA/TUA • Add/Edit Shelter/Utility Expense • Shared Expenses	

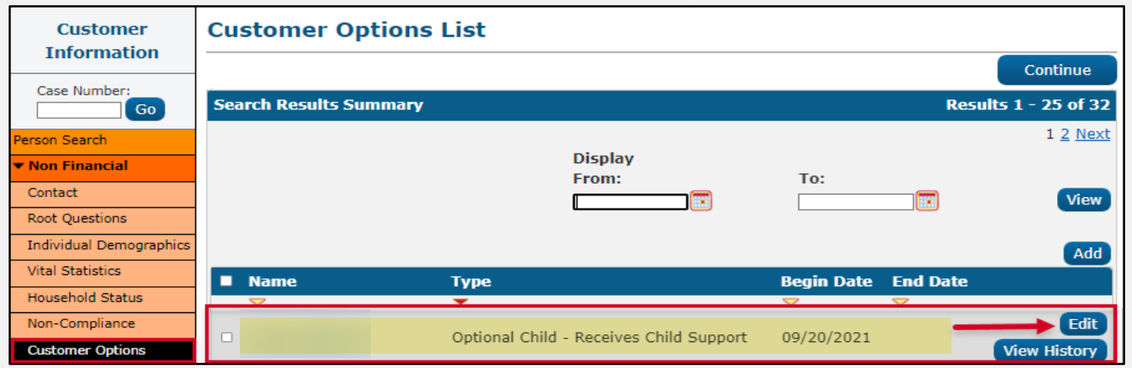
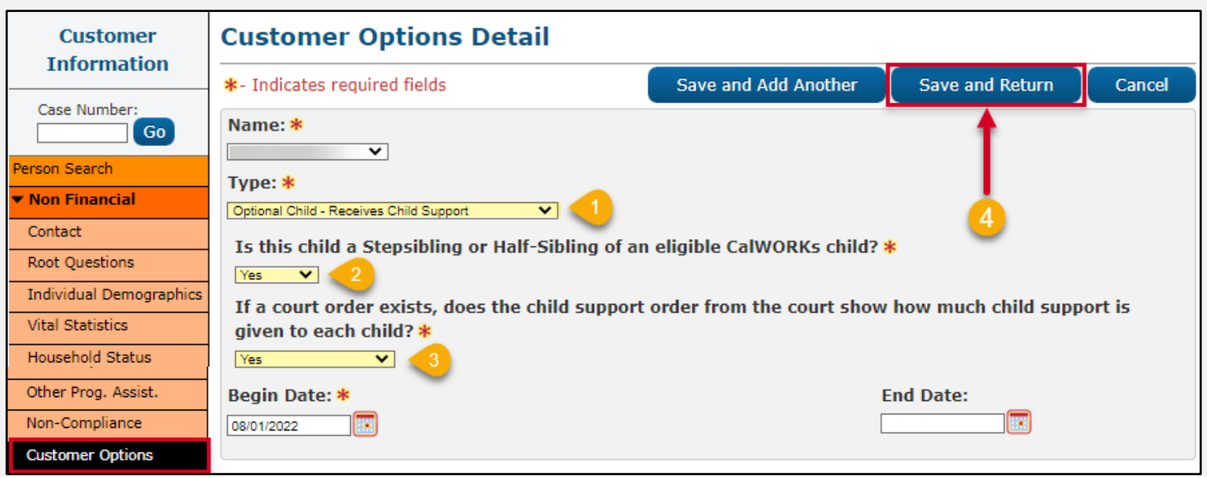
Steps To Clear Alert	Screenshot
9 For Other Program Assistance (**OPA**) discrepancies, navigate to the Other Program Assistance Detail page: ★ **OPA** – when an applicant receives benefits or assistance from another program such as: Adoption Assistance Program, Adult Protective Services, CAPI, Cal-Learn, SSI/SSP, etc. 1. Click on the **Eligibility** tab on the **Global navigation** bar. 2. Select **Customer Information** from the **Local** navigator. 3. Expand on the **Non-Financial** link in the **Task** navigation bar. 4. Click the **Other Program Assistance** link on the **Task navigation** bar. To view, add, or edit the details of an expense, refer to the following Job Aid located in the **Help Icon** on the Utility Navigator: **JA Other Program Assistance (OPA) Detail Page**	

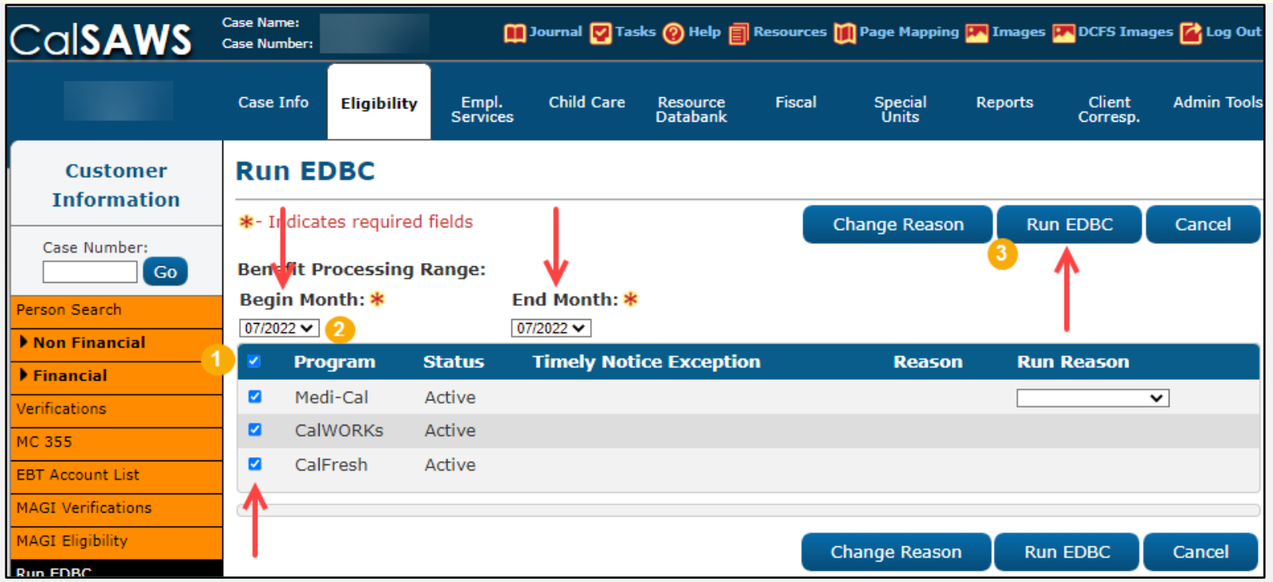
Steps To Clear Alert		Screenshot
10	To view and/or correct any Non-compliance, Sanctions or Penalty discrepancies on a case: 1. Place cursor over **Eligibility** on the **Global** navigation bar. 2. Select **Customer Information** from the **Local** navigator. 3. Click the **Non-Compliance** link within the **Non-Financial** dropdown pane in the task navigation bar.	

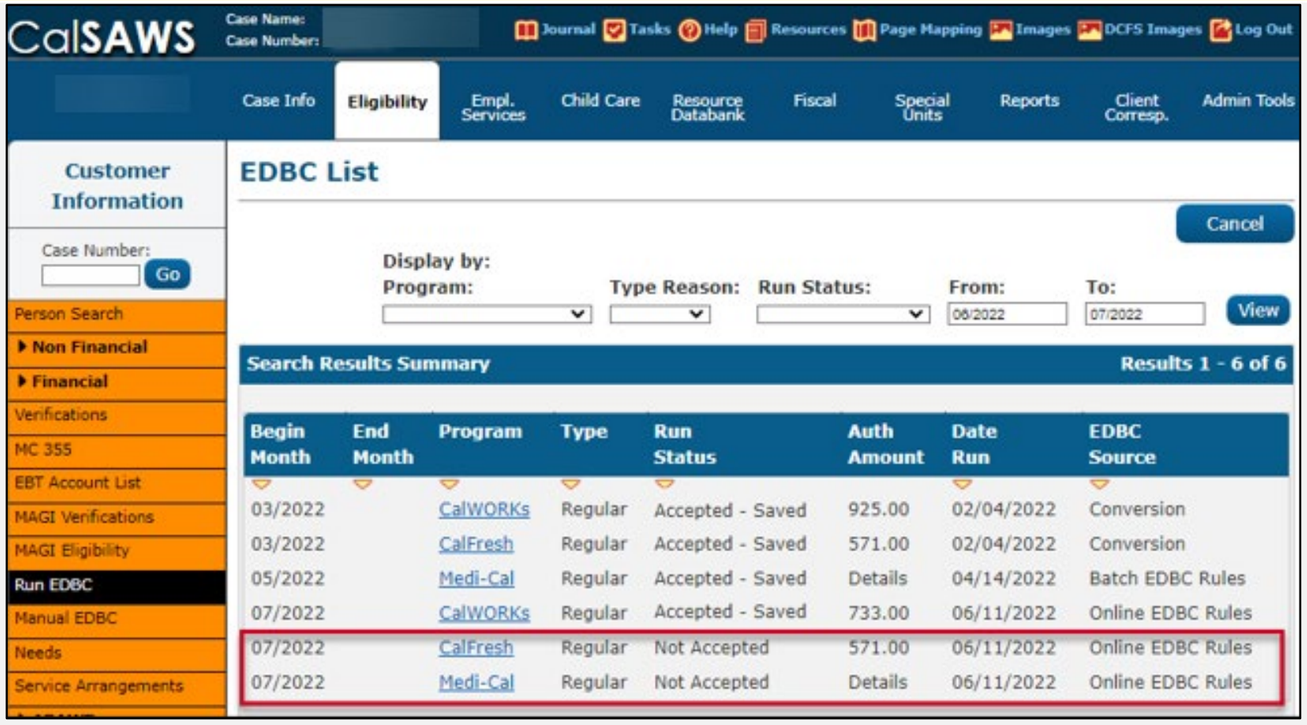
Steps To Clear Alert	Screenshot
11 To view and correct and benefit discrepancies that may arise from a Household member being penalized for "**Refused to Assign Supp Rights**:"	

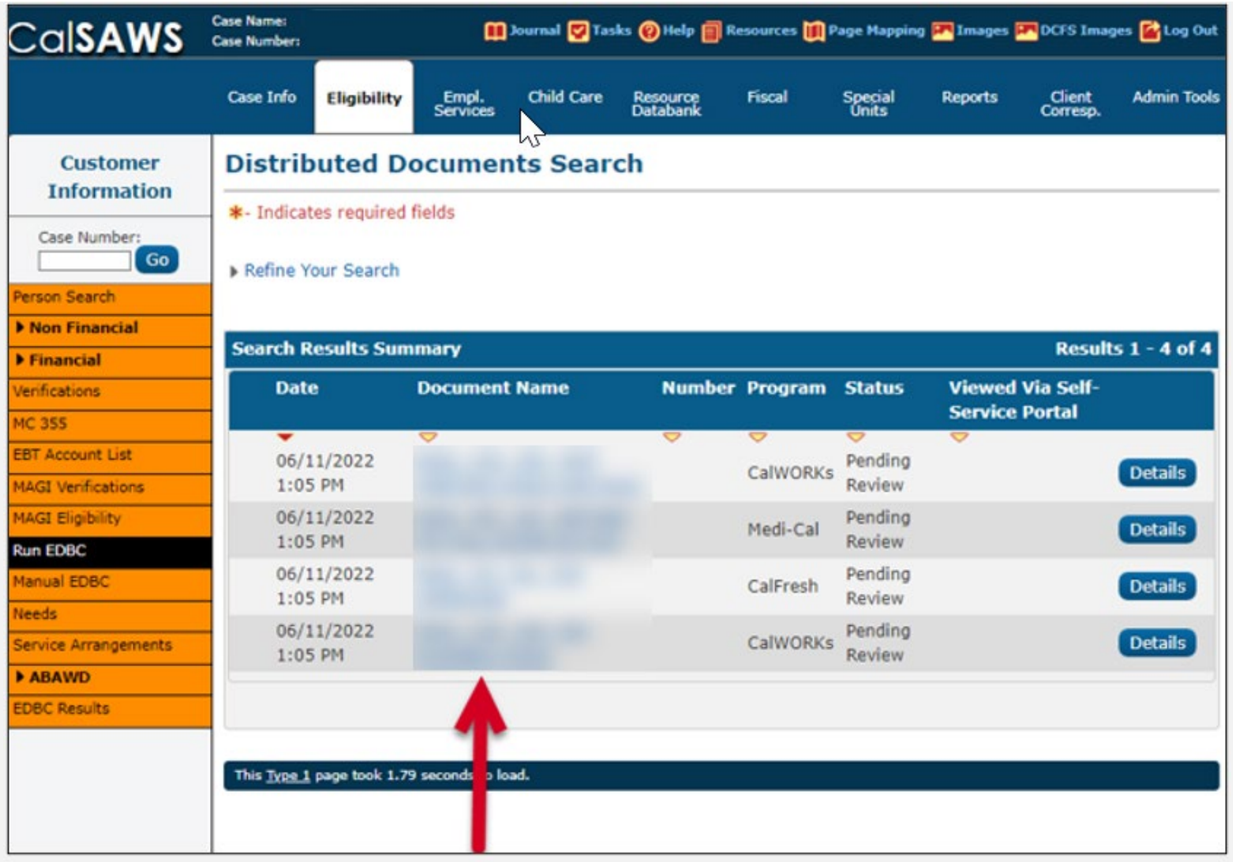
Steps To Clear Alert	Screenshot
1. Place the cursor over **Eligibility** on the Global navigation bar. 2. Select **Customer Information** from the Local navigator. 3. Click the **Absent Parents** link on the Task navigation bar to access the Absent/Unmarried Parent List page. 4. Click the **Name** hyperlink, the **Add** button or the **Edit** button to access the Support Questionnaire page in View, Add, or Edit mode, respectively. 5. Review the information to determine if the support rights information is correct. If this information must be changed, select either the **Edit** button to update the existing entry, or the **Add** button to add a new entry. 6. Click **Save** to confirm any updates.	

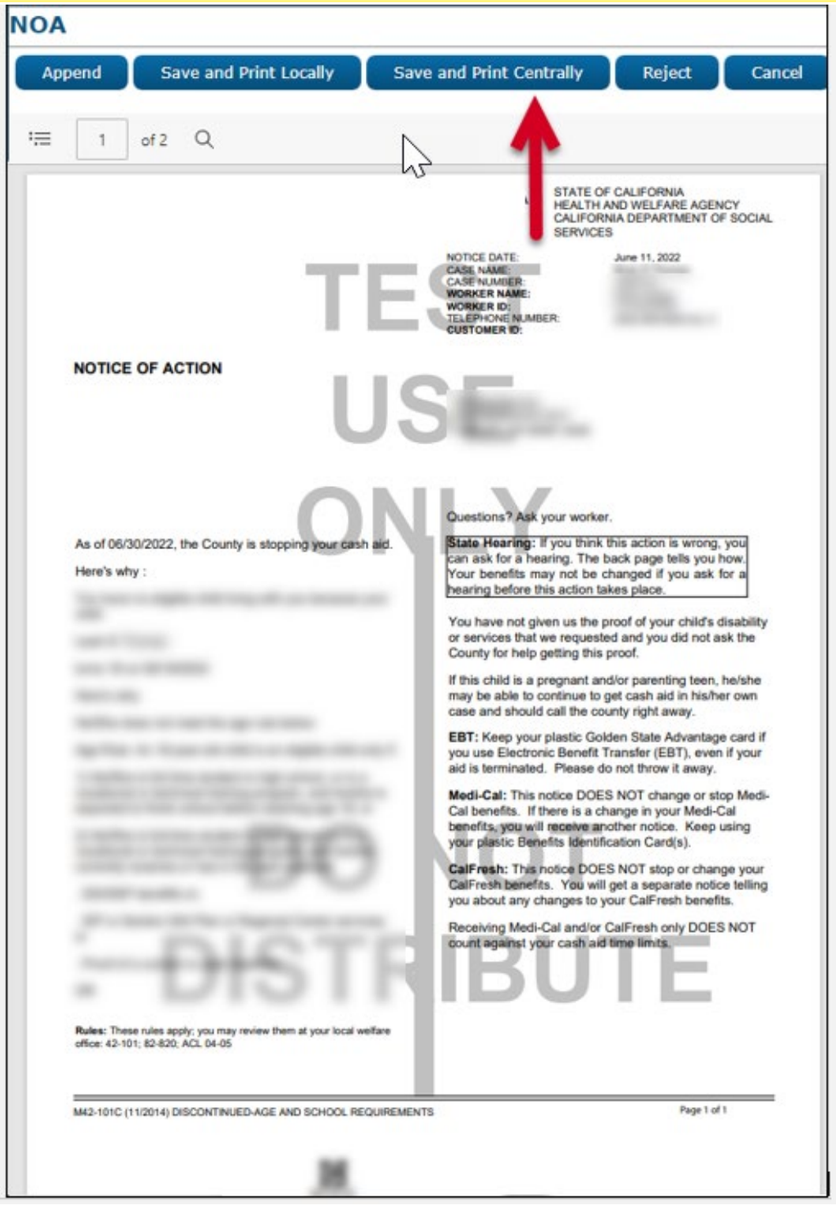
	Steps To Clear Alert	Screenshot
12	To view and correct CalFresh benefit discrepancies that arise from **"Foster Care Transitional Housing Payments"** being counted toward CF EDBC results: Users will need run EDBC for the Foster Care and CalFresh Programs in a specific sequence. Converted EDBCs may not be populating the **Transitional Housing Benefit** Amount, and thus the income is not excluded from the CF case. EDBCs for the come-up month exclude that amount as expected. Review and compare details within the **Unearned Income** hyperlink to review the type and amount of Foster Care income used in CF budgeting. Access the active **Foster Care** case of the HH member feeding into the CalFresh budget and **run EDBC for the Foster Care Program** separately to determine the appropriate Foster Care payment rate and type. Accept and Save the Foster Care EDBC results before navigating back to the CalFresh Case to run EDBC with the appropriate payment levels and types. (An override may be needed to correct the benefit amount.)	 

Steps To Clear Alert	Screenshot
13 To view and correct Benefit Mismatches resulting from a **CalWORKs child receiving Child Support requesting exclusion** due to Senate Bill 380 (MMO - Medi-Cal Member Only Role): Users will need to review the **Income List** in the case to ensure that the child requesting exclusion has an Income record for **Child Support** received. The **Customer Options** page allows you to specify which child(ren) is being excluded from the CalWORKs MAP determination. Navigate to **Customer Options** link in the task navigation pane and select the record of the **Optional Child** to review and ensure the appropriate options have been set. Failure to do so may result in incorrect benefits being issued. In **Customer Options Detail** page: 1. Select: **Optional Child – Receives Child Support** 2. Indicate whether the child is stepsibling/half-sibling of an eligible CW AU member. 3. Indicate whether a court order for support exists and indicates a specific support amount per child. 4. Click **Save and Return**, then navigate back to Run EDBC. EDBC will determine if the child meets all requirements to exclude from the CalWORKs AU MAP based on the information on the Customer Option Detail page and the Income page.	  

	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, accept and save the new EDBC budget 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 your county policy when Troubleshooting EDBC Results.	

Steps To Clear Alert		Screenshot
13	Click on **EDBC Summary hyperlinks** for each program to review all eligibility factors for budgeting. Accept and save EDBC results. Additional **Quick Guides** available in LMS **and Job Aids** available in CalSAWS: **JA EDBC – Troubleshooting Incorrect Results** **JA EDBC – Online Definitions and Troubleshooting**	

	Steps To Clear Alert	Screenshot
14	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. If the NOA is not reviewed it will go out due to an overnight batch process.	

	Steps To Clear Alert	Screenshot
15	Once the Notice of Actions are reviewed, accepted, and Save and Print Centrally, journal the action taken according to county policy. Navigate back to the **Case Summary** page.	

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