



## Yellow Banner Case Review Report

### Mismatch Reasons, Priorities and Scenarios

#### **Background**

During the conversion cutover from CalWIN to CalSAWS, the system will run a Batch EDBC job for October 2023 on 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.**

However, the flagged cases will require further case review by a Case Worker to determine the difference in the EDBC results and make appropriate case updates to resolve the issue.

Post Go-Live, CalSAWS users across all CalWIN Counties may see a yellow case banner on active cases due to an EDBC Mismatch. The CalSAWS Project will provide the Counties with a listing of impacted cases with the associated EDBC Mismatch Reason, along with a guide on county actions that can be taken to clear the Yellow Banners.

The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided 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.



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:  Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Application Questions

Negative Action

New Program

New Person

Hide Person

EBT Account List

Case Summary

Case Name County

Companion Cases

Case Number Case Name Add

Display: 07/01/2022 View

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.

**Batch EDBC will not be run on these cases until the User performs the case review, takes appropriate action, accepts, and saves EDBC.**



## Mismatch Reasons and Priorities

Mismatch Reason	Description	Priority
<b>Program Discontinued</b>	When EDBC is run in CalSAWS, active Programs in the CalWIN System are resulting in a Program Discontinuance in CalSAWS.	1
<b>Recoupment Mismatch</b>	When EDBC is run in CalSAWS, the Recoupment amount in CalSAWS differs from what was determined in the CalWIN System.	1
<b>Program Person Status Mismatch</b>	When EDBC is run in CalSAWS, the Program Person Status does not match what was determined in the CalWIN System.	1
<b>Cash Program not Authorized</b>	When EDBC is run in CalSAWS, the Cash Program fails due to a mismatch; therefore, the associated CalFresh (CF) Program also fails.	1
<b>Program Person Role Mismatch</b>	When EDBC is run in CalSAWS, the Program Person Roles are mismatched (such as MEM, UP, FRE, or FRI) between converted CalWIN EDBC and CalSAWS run EDBC.	2
<b>Benefit Amount Mismatch</b>	When EDBC is run in CalSAWS, the Benefit Amount does not match with what previously determined in the CalWIN System.	3
<b>Aid-Code Mismatch</b>	When EDBC is run in CalSAWS, the Aid Code does not match with what was determined in the CalWIN System.	3
<b>Prior Or Current EDBC Not Found</b>	EDBC run in CalSAWS is unsuccessful due to no Prior or Current EDBC result to compare against in the CalWIN System.	3



Mismatch Reason	Description	Priority
<b>MAGI Determination Pending</b>	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
<b>Exclusion/Exception</b>	<p>EDBC results are not matching based on one of the following reasons:</p> <ul style="list-style-type: none"><li>• There is no active or pending person for this program.</li><li>• Exception</li><li>• At least one day in the child placement has a missing rate.</li><li>• Program does not have at least one active person for the benefit month.</li><li>• Overridden Program Case</li><li>• Overdue or Incomplete Periodic Report</li><li>• Overdue or Incomplete RE Packet</li><li>• Soft Paused</li><li>• Medi-Cal person on 38 aid code</li><li>• Medi-Cal person on 4M Aid Code</li><li>• Requested MC Type is FFY with a person 26 years of age or older.</li><li>• Requested Medi-Cal types must apply to all or none of the household members.</li><li>• The following information is missing: KinGap Dates</li><li>• County Arrival Date is missing for the applicant (GA Only)</li></ul>	3
<b>Full Case Review</b>	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**

Batch EDBC will **not** be run on Yellow Banner cases. However, some Negative Action Batch jobs **will** still apply to these cases, as appropriate.

Counties were given the option to Opt In or Opt Out\* of these Batch jobs. Previous Opt In/Out decisions made via CRFI were reconfirmed with each county prior to Go-Live. The table below shows a list of the county Negative Action Batch jobs that applies to all counties, as well as any Opt In/Opt Out jobs elected by each county.

Negative Action Batch Jobs that will run for all counties	County elected Opt In/Opt Out Batch Jobs – DDID 1110*
CalWORKs RE Discontinuance	CalWORKs 60 Month Time Limit Discontinuance
CalFresh RE Discontinuance	RCA Discontinuance
SAR7 Due Discontinuance	Postponed Verification Past Due for Expedited CalFresh
TNB RE Due	Deny CalFresh for Missed Interview
MAGI Medi-Cal Discontinuance	
Medi-Cal RE Discontinuance	
CAPL RD Not complete	
CalWIN EICT Inbound Disposition Received	



These cases should be reviewed prior to the Negative Batch run to avoid program and/or case discontinuance.

Throughout the year, the CalSAWS system runs various Cost of Living Adjustments (COLA) batch jobs. A review of cases with Yellow Banners should be performed before the next COLA run. If users review the Yellow Banner cases and run EDBC on-line prior to the next COLA run, the system will apply the COLA run values automatically. If the review is **not** completed prior to the COLA run, users will have to apply the COLA increase manually. A separate CIT will be sent to the counties after each COLA run, identifying these cases. The table shown below is a list of COLA runs that could potentially impact Yellow Banner cases.



## COLA List

(Dates are subject to change)

Release #/ Priority Release	Targeted Release Date	CalSAWS Production Deployment Date	COLA Multiple Day Processing	Notes
23.07.27	<b>7/28/2023</b>	7/27/2023		Rate Increase - AAP CNI Rate Increase 2023-2024 (CA-243008) Rate Increase - FC, KG CNI Rate Increase 2023-2024 (CA-243006)
23.08.05	<b>8/06/2023</b>	8/05/2023		Batch COLA - AAP CNI Rate Increase 2023-2024 (CA-243010) Batch COLA - FC, KG CNI Rate Increase 2023-2024 (CA-243007)
23.08.31	<b>9/1/2023</b>	8/31/2023	Yes	Rate Increase - 2023-2024 CF COLA; CW MAP 2023-2024 (CA-243002)
23.09.09	<b>9/10/2023</b>	9/9/2023		Batch COLA - 2023-2024 CF COLA; CW MAP (CA-243001)
23.12.02	<b>12/3/2023</b>	12/2/2023		Rate Increase -2024 SSA COLA (CA-242762)
23.12.07	<b>12/8/2023</b>	12/7/2023		Rate Increase - 2024 CAPI COLA (CA-243003)
23.12.09	<b>12/10/2023</b>	12/9/2023		Batch COLA - 2024 SSA COLA (CA-242763) Batch COLA 2024 CAPI COLA (CA-243004)