## Full Case Review

**Priority Level: 3** 

## Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care

## 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_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	Full Case Review	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.

# <u>Example</u>

Full	Case Review		
	Steps To Clear A	lert	Screenshot
1	Log in to CalSAWS by entering you	r Username and Password	CalSAW
			User Name
			Remember my username
			LOG IN



- 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



Case Name: Case Number:			lournal 🕎 Tas	ks 🔞 Help 🧧	Resources 🔟	Page Mappin	g 🎮 Images 🖡	PDCFS Imag	es 🚰 Log Out
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🗕 Compa	nion Cases								
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Display: 07/01/2022	Vie Vie	W	÷						
⊧ Full Case Guide fo	e Review is r instructio	required b ns on how	efore EDBC to proceed	is run and . Programs	authorized. Affected: Ca	Please re IWORKs,	f <mark>er to the</mark> M CalFresh.	lanual Case	e Review



Note the **Yellow Banner** on the Case Summary Page

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- **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



Run EDBC

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- 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 <u>cannot</u> be run without the appropriate updates made to the data collection pages.

When experiencing a **Soft Validation**, EDBC <u>can</u> 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.



**Screenshot** 

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EBT Account List		Med	i-Cal	Acti	ve			
MAGI Verifications								
MAGI Eligibility	The	follo	wina veri	ificat	ion(s) l	nave not bee	n received	
Run EDBC								
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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), Noncompliance/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**.



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			Results	1 - 6 of 6
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1	414.00	01/12/2022	Conversion	
	Details	01/11/2022	Conversion	
	Details 733.00	01/11/2022 06/10/2022	Online EDBC	Rules
1	Details 733.00 459.00	01/11/2022 06/10/2022 06/10/2022	Online EDBC	Rules

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.

		Scre	enshot			
[	02/2022 CalWORKs Budget - Converted			07/2022 CalWORKs Budget – Online EDBC		
CalWORKs Budget		Regular	CalWORKs Budget		Regular	
Unearned Income	<→	\$ 0.00	Unearned Income	→	\$	0.00
Unearned Income Disregards		- 0.00	Unearned Income Disregard	s	-	0.00
Net Unearned Income		- 0.00	Net Unearned Income		-	0.00
Earned Income	<→	\$ 0.0	Earned Income	<u> </u>	\$	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 Incom	e	\$	0.00
MAP Family Unit Size	<→	1	MAP Family Unit Size	$\leftarrow$		2
Family MAP	<>	\$ 579.00	Family MAP	<>	\$	733.00
Family MAP Test		Pas	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 Need	is	\$	0.00
Aid Payment	$\longleftrightarrow$	\$ 579.00	Aid Payment	$\leftarrow$	\$	733.00

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.

					Sc	reenshot
CalFresh ED	BC Summary					CalFresh EDBC S
*- Indicates require	ed fields				Clo	se *- Indicates required field
Begin Month	End Month	Run Date	Run Status		Accepted By	Begin Month
02/2022		01/12/2022	Accepted - S	aved		07/2022
EDBC Information	n					EDBC Information
Semi-Annual Rep Month: Reporting Type R Type: Regular Recalculation: No	orting Period Begin eason:					Semi-Annual Reporting Month: Reporting Type Reason Type: Regular Recalculation: No
Regular Program System Determ EDBC Source: ( Aid Code: 09 - Program Status Note: Overridder	Configuration ination Conversion CalFresh s: Active n rows are in bold.	-				Regular Program Config System Determinatio EDBC Source: Online Aid Code: 30 - CW-All Program Status: Activ SUAS Eligible: Yes
Name	DOB	Role	Role Reason	Status	Status Reason	Program Type: Regula
		MEM		Active		Note: Overridden rows
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		MEM		Active		

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puration n EDBC Rules Other Families ( /e ar ar are in bold. DOB	(Fed)	Role Reason	Status Active Active	Status Reas	on

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.

Screenshot							
Gross Income Eligibility		Regular		Gross Income Eligibility		Regular	
Unearned Income	<→	\$	0.00	Unearned Income	~ <b>&gt;</b>	\$	733.00
Earned Income		+	<u>0.00</u>	Earned Income		+	0.00
Total Gross Nonexempt Income		-	0.00	Total Gross Nonexempt Income		-	733.00
Household Size			2	Household Size			2
Maximum Gross Income		\$	0.00	Maximum Gross Income		\$	0.00
Result	← →		Pass	Result	<	•	Waived
Net Income Eligibility		Regular	Ì	Net Income Eligibility		Regular	
Unearned Income		\$	<u>733.00</u>	Unearned Income		\$	733.00
Earned Income	← →	+	0.00	Earned Income	<→	+	0.00
Deductions	← →		<u>177.00</u>	Deductions	<	-	177.00
Total Adjusted Income		=	556.00	Total Adjusted Income		-	556.00
Excess Shelter Costs		\$	<u>409.00</u>	Excess Shelter Costs		\$	<u>609.00</u>
Maximum Shelter Allowance		\$	597.00	Maximum Shelter Allowance		\$	597.00
Allowed Shelter Costs	← →	\$	278.00	Allowed Shelter Costs	<	\$	597.00
Total Net Nonexempt Income		-	147.00	Total Net Nonexempt Income		=	0.00
				University of Cine			2
Household Size	<>		2	Housenblu Size	<u>,                                     </u>		2
Maximum Net Income		\$	1,452.00	Maximum Net Income		\$	0.00
Result			Pass	Result			Waived

- **6** For income discrepancies and/or review:
  - 1. Click on the **Eligibility** tab 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.



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#### **Steps To Clear Alert Screenshot** For Income Categories, Income Types, Adding, Editing, Case Name: 🛄 Journal 💟 Tasks 🔞 Help 🗐 F Case Number: Viewing, or Removing all income for all persons associated to the case, refer to Job Aid: **JA Income Categories and Types** Empl. Services Eligibility Child Care Case Info Resource Databank in the System. Customer Income List Additional Income Quick Guides available in LMS and Job Information Aids available in CalSAWS: \*- Indicates required fields Case Number: Root Questions Go CalSAWS Quick Guide: Potentially Available Income (needs Person Search updating, contains C-IV references) Non Financial • CalHEERS Verifications Financial CalSAWS Quick Guide: Sponsorship and Deemed Income Root Questions Search Results Summary (needs updating, contains C-IV references) Income Display Tax Household From: JA Foster Care Income and Property Detail Page Property Special Needs Name Category Type JA Medi-Cal – Income In-Kind – Unearned Expenses Medicare Earnings Salary, Wages Third Party Liability JA SSIAP – SSI (Disability) Other Health Care Earnings Salary, Wages Health Care Ref. IEVS Hunt v. Kizer **Income Categor** /erifications 4C 355 EBT Account List MAGI Verifications This <u>Type 1</u> page took 0.36 seconds to load. MAGI Eligibility Run EDBC Manual EDBC

Needs

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Service Arrangements

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Some Full Case Review 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.

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			000.40			

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.

Ensure that all Household members who Purchase and Prepare together are listed on the **Purchase and Prepare** Detail Page.

#### New IRT Calculation

Categorically Eligible: Yes	
Eligible for Expedited Service: No	
Public Assistance: Yes	

Restaurant Meals: No

Meets ESAP Criteria: No

SUAS Eligible: Yes

Modified Categorical Eligibility: No

#### **Property Eligibility**

Data Month Property:

Benefit Month Property:

Property Limit:

Result:

#### Gross Income Eligibility

Unearned Income

Earned Income

Total Gross Nonexempt Income

#### Household Size

Maximum Gross Income

Result

Net Income Eligibility

Unearned Income

Earned Income

Deductions

Total Adjusted Income

Excess Shelter Costs

Maximum Shelter Allowance

Allowed Shelter Costs

## . . . . . . . . .

Regula	r
\$	25.00
\$	25.00
\$	2,500.00

Regula	r
\$	<u>733.00</u>
+	<u>0.00</u>
=	733.00
	2
\$	0.00
	Waived

Regular	
\$	<u>733.00</u>
+	<u>0.00</u>
-	<u>177.00</u>
=	556.00
\$	<u>609.00</u>
\$	597.00
\$	597.00

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

![](_page_13_Picture_14.jpeg)

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- 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

![](_page_14_Figure_15.jpeg)

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- **9** For Other Program Assistance (**OPA**) discrepancies, navigate to the Other Program Assistance Detail page:
  - $\bigstar$
- 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** 

![](_page_15_Figure_11.jpeg)

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**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.

				Scree	enshot					
Cal <b>SAWS</b>	Case Name: Case Number:				🛾 Journal 💟 Ta	asks 🔞 Help	Resources	ୂ Page Mappi	ng 🎮 Imagi	ng <mark></mark> Log Out
(1)	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer	Contac	Workload Inv	ventory							
Information		Case Summa	ary							Continue
Case Number:	Search R	Customer I	nformation		<u> </u>				Result	s 1 - 6 of 6
Person Search		Reporting			Display From:		To:			
Non Financial     Contact		Distributed D	Documents	-					)	View
Root Questions		Customer Sc	hedule	_					Sear	ch Address
Individual Demographics	Address	Courtesy Mo	nth	-						
Household Status	Person			Address		Be	egin Date	End Date		
Relationship			Mailing			08	/01/2022	<b>`</b>	Min	Edit
Pregnancy	-								VIE	Edit
Deemed Eligibility			Physical			08	/01/2022		Vie	w History
Residency Other Prog. Assist			Mailing			08	/01/2022			Edit
Non-Compliance		-3							Vie	Edit
Customer Options		-	Physical			08	/01/2022		Vie	w History

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

				Scre	enshot					
Cal <b>SAWS</b>	Case Name: Case Number:									
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Customer	CalWO	RKs ED	BC Sun	nmary						
Information	*- Indicat	es required f	ields				Change Rea	son	Accept	Cancel
Case Number:	Begin Mo	nth	End Mo	nth	Run Date		Run Status		Accented F	łv
Person Search	10/2022				08/31/20	22	Not Accepted			
Non Financial										
Financial	EDBC Inf	ormation								
Kin-GAP	Annual R	eporting Pe	riod Begir	Month: 07	7/2022					
GA/GR	Reporting	g Type Reas	on: Child	Only						
/erifications	Type: Re	gular								
MC 355	Recalcula	tion: No								
EBT Account List	Dreaman	Configurati								
MAGI Verifications	program	Configurati	on							
MAGI Eligibility	System I	Determinati	on							
Run EDBC	EDBC So	urce: Online	e EDBC Rul	es						
Manual EDBC	Aid Code	: 33 - CW-	Zero Parent	(Fed)						
Veeds	Program	Status: Ac	tive							
Service Arrangements										
ABAWD	Note: Ov	erridden row	s are in bol	d						
EDBC Results	Note. Ov	ennuuen 10w	s are in Doi	u.						
	Name		DO	B	Role Rol	e Reason		Statu	is Status	Reason
		<u>10M</u>		1	MEM		Curren Di Li	Active		
		35		F	-RI Refu	sed Assign	Supp Rights	Active		
		9	11	ľ				Active		

- 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.

				Scree	nshot	
CalSAWS	Case Name: Case Number:		m	Journal 🕎 Tas	ks 🔞 Help 🗐	Resou
	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fis
_						
	SUPPORT Do you w No	T ENFORCE	MENT SERV	VICES (MED	I-CAL ONLY	) 5?
	Certificat	tion and Ag	reement			
	Assign C	hild/Spous	al Support	Rights		
	Туре					
	I refuse t	to assign chi	ld/spousal s	upport rights		
	<u>I refuse t</u>	<u>to assign chi</u>	ld/spousal s	upport rights		
	<u>I refuse t</u>	<u>to assign chi</u>	<u>ld/spousal s</u>	upport rights		
	Assign M	ledical Sup	port Rights	;		
	Туре					
	I refuse t	to assign me	dical suppo	rt rights		
	<u>I refuse t</u>	<u>to assign me</u>	<u>dical suppo</u>	<u>rt rights</u>		
	<u>I refuse t</u>	<u>to assign me</u>	<u>dical suppo</u>	<u>rt rights</u>		
	Child Su	pport Coop	eration			
	Туре				1	Begin
	Do not a	<u>gree to coop</u>	<u>erate</u>			07/01
	Do not a	<u>gree to coop</u>	<u>erate</u>			07/08
	<u>Do not a</u>	<u>gree to coop</u>	<u>erate</u>			01/03

Special Units	Reports	Client Corresp.	Admin Tools
Begin	Date	End Date	
07/01,	/2015	07/07/2016	
07/08,	/2016	01/02/2018	
01/03,	/2018		
Begin Da	te	End Date	
07/01/20	15	07/07/2016	
07/08/20	16	01/02/2018	
01/03/20	18		
te	End D	ate	
5	07/07	/2016	
,	01/02	,2010	

To view and correct CalFresh benefit discrepancies that arise 12 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** <u>separately</u> 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.)

#### Gross Income Eligibility Regular Gross Income Eligi Unearned Income 0.00 Unearned Income \$ Earned Income <u>0.00</u> Earned Income Total Gross Nonexempt Income 0.00 Total Gross Nonexemp Household Size 5 Household Size Maximum Gross Income 0.00 Maximum Gross Incom Result Pass Result MCE Limit Net Income Eligibility Regular MCE Result Unearned Income <u>2,475.00</u> Earned Income 0.00 Net Income Eligibi Deductions 215.00 Unearned Income Total Adjusted Income 2,260.00 Earned Income Deductions Excess Shelter Costs \$ 802.00 Total Adjusted Income

#### EDBC Person Line Item Detail - Unearned Income

Name

12F

16F

Close Description Amount Name Туре Child Support -CalWIN Conversion: Source Income Type: Child/Spousal 337.50 12F \$ Direct Support Direct From A/P or DA 37F 8M Child Support -CalWIN Conversion: Source Income Type: Child/Spousal \$ 337.50 8M Direct Support Direct From A/P or DA 16F Other Unearned All CalWIN Conversion: Source Income Type: May Cash Benefit \$ 1,125.00 13 38 37F Spousal Support - CalWIN Conversion: Source Income Type: Alimony - Spousal 337.50 \$ Direct Support Child Support -CalWIN Conversion: Source Income Type: Child/Spousal 337.50 Direct Support Direct From A/P or DA This <u>Type 1</u> page took 0.45 seconds to k Total \$ 2,475.00

![](_page_19_Picture_13.jpeg)

#### **Screenshot**

lity	Regula	ır
	\$	<u>3,734.00</u>
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y .	Regular	
	\$>	<u>3,734.00</u>
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	-	225.00
	=	3,509.00

#### **EDBC Person Line Item Detail - Unearned Income**

			Close
Туре		Description	Amount
Child	Support - Direct	(10/01/2022) \$337.50	\$ 337.50
Spous	sal Support - Direct	(10/01/2022) \$337.50	\$ 337.50
Child	Support - Direct	(10/01/2022) \$337.50	\$ 337.50
Child	Support - Direct	(10/01/2022) \$337.50	\$ 337.50
F Foster	r Care	08/2022 EDBC run 07/09/2022	\$ 2,384.00

Total \$ 3,734.00

Close

13 To view and correct Full Case Review Banners 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.

![](_page_20_Figure_12.jpeg)

Continue	
Poculte 1 - 7 of 7	
To:	
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t Order 01/01/2021 Edit View History	
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	1
Add Another Save and Return Cancel	
WORKs child? *	
he court show how much child support is	
End Date:	

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.

![](_page_21_Picture_3.jpeg)

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.

![](_page_21_Picture_8.jpeg)

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iscal	Special Units	Reports	Client Corresp.	Admin Tools
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	Reaso	n Run	Reason	
				~
C	hange Reaso	n Run	EDBC	Cancel

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

				Scre	enshot					
	Case Name: Case Number:			Journal 🕎 T	asks 🔞 Help 🗐	Resources	🚺 Page Ha	apping 🎮 Images	DCFS Images 🙆 Log	Ou
	Case Info	Eligibility	Empl. Services	Child Care	e Resource Databank	Fiscal	Speci Unit:	al Reports s	Client Admin 1 Corresp.	Tool
Customer	EDBC I	ist								
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Non Financial	Search R	esults Su	mmary						Results 1 - 6 o	f 6
Non Financial Financial	Search R	esults Su	mmary						Results 1 - 6 o	f 6
Non Financial Financial erifications C 355	Search R Begin Month	esults Su End Month	mmary Program	Туре	Run Status	1	\uth \mount	Date Run	Results 1 - 6 o EDBC Source	f 6
Non Financial Financial rifications : 355 T Account List	Search R Begin Month	esults Su End Month	mmary Program	Type	Run Status	, ,	Auth Amount	Date Run	Results 1 - 6 o EDBC Source	f 6
Non Financial Financial rifications 355 T Account List AGI Verifications	Search R Begin Month	esults Su End Month	mmary Program	Type Regular	Run Status Accepted - S	aved 9	Auth Amount 925.00	Date Run ©2/04/2022	Results 1 - 6 o EDBC Source	f 6
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Non Financial Financial rifications C 355 IT Account List AGI Verifications AGI Eligibility In EDBC Inual EDBC eds	Search R Begin Month 03/2022 03/2022 05/2022 07/2022	esults Su End Month	Program  CalWORKs CalFresh Medi-Cal CalWORKs CalFresh	Type Regular Regular Regular Regular Regular	Run Status Accepted - S Accepted - S Accepted - S Accepted - S Accepted - S Not Accepted	aved 9 aved 5 aved 0 aved 0 aved 7	Auth Amount 925.00 571.00 Details 733.00 571.00	Date Run ♥ 02/04/2022 02/04/2022 04/14/2022 06/11/2022	Results 1 - 6 o EDBC Source Conversion Conversion Batch EDBC Rules Online EDBC Rules	f 6

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.

![](_page_23_Picture_3.jpeg)

	Special Units	Reports Client Corresp	Admin Tools
		Resu	ilts 1 - 4 of 4
ogram	Status	Viewed Via Self- Service Portal	
IWORKs	Pending Review	<	Details
di-Cal	Pending Review		Details
lFresh	Pending Review		Details
	Pending Review		Details
IWORKs			
IWORKs			

![](_page_24_Picture_1.jpeg)

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	June 11, 2022	
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ou thin ng. The not be action	It this action is wrong, you e back page tells you how. e changed if you ask for a takes place. e proof of your child's disability sted and you did not ask the	
ting thi gnant a tinue ti	and/or parenting teen, he/she o get cash aid in his/her own	
all the o astic G Benefi Please	county right away. olden State Advantage card if t Transfer (EBT), even if your do not throw it away.	
ice DO re is a ceive a	ES NOT change or stop Medi- change in your Medi-Cal another notice. Keep using tification Card(s).	
You w	DES NOT stop or change your vill get a separate notice telling o your CalFresh benefits.	
and/o cash a	x CalFresh only DOES NOT id time limits.	
	Page 1 of 1	
-		

**16** Journal the action taken according to county policy.

The Yellow Banner will no longer appear on the case.

The case review is complete!

				Scree	enshot					
	Case Name: Case Number:		m	Journal 🕎 Tas	sks 🔞 Help 📋	Resources	🗍 Page Mappin	g 🎮 Images	🞮 DCFS Imag	jes 🚰 Log Out
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Case Summary	Case S	Summar	у							
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Case Summary	Case Nu	ımber				Case Nam	1e			_
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Application Questions	07/01/2022	🗔 🔽 Vie	w Y	ellow	v Ban	ner d	clear	ed!		
Negative Action										
New Program	- CalWO	RKs								
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