

Prior or Current Eligibility Determination Budget Calculation (EDBC) Not Found

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.

These cases are identified because the Eligibility Determination Budget Calculation (EDBC) run in CalSAWS is unsuccessful due to not having a Prior or Current EDBC in the CalWIN System to compare the benefits match results.

This is applicable only when converted CalWIN EDBC results are not found to compare the results.

The user will need to Run EDBC in CalSAWS and compare the results to the last EDBC results in CalWIN prior to conversion. If the results in CalSAWS match the last eligibility determination in CalWIN, users can accept and save the EDBC results. Users will need to document that the review took place using the Journal functionality. This will clear the Yellow Banner. If EDBC results in CalSAWS **do not** match, users will need to update the applicable data collection pages based on county policy, and re-run EDBC upon completion of their review. If the results are as expected, users will accept and save the EDBC results; documenting the review took place. This will clear the Yellow Banner.

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_INCOMESSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	Medi-Cal	Prior or Current EDBC Not Found	11/30/2022		3	

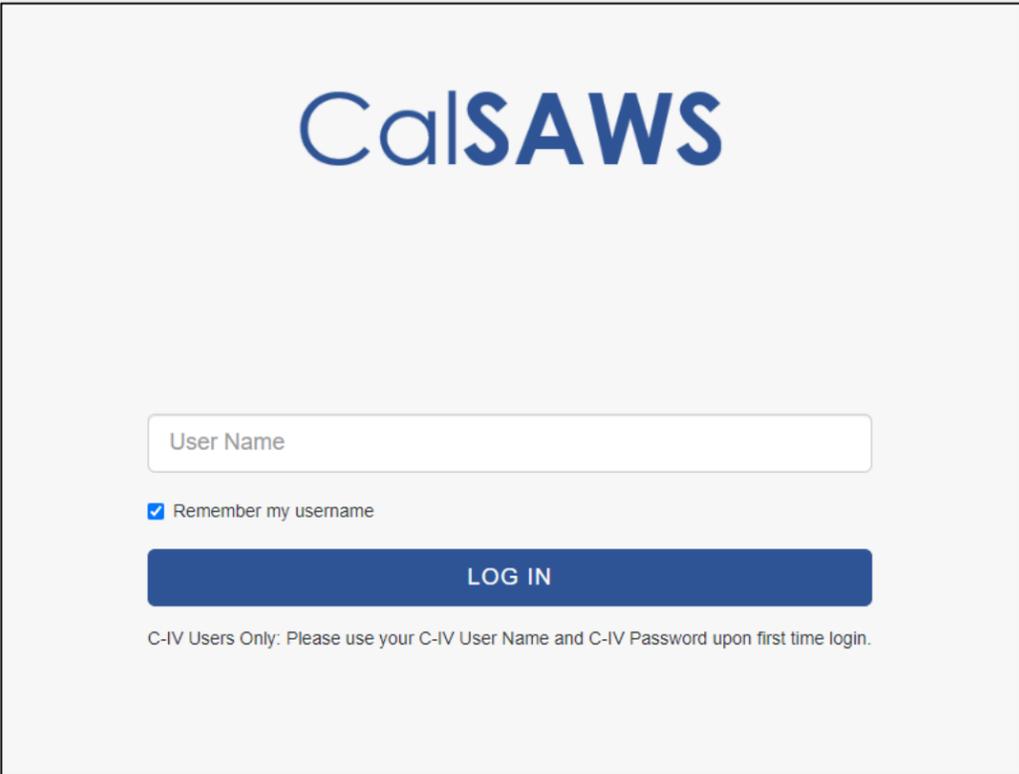
Note: The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided below are intended to direct users to the most impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all the information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

Example:

User will need to conduct a case review for this CalWORKs program case with a Yellow Banner.

The user will need to verify the last known EDBC Results in the CalWIN System. The user will conduct a review of the case for the program(s) for both non-financial and financial eligibility requirements. The user will proceed to update all required data collection pages in accordance with program rules. The user will run EDBC in CalSAWS once the review is complete, ensuring the household received accurate program benefits.

Prior or Current EDBC Not Found

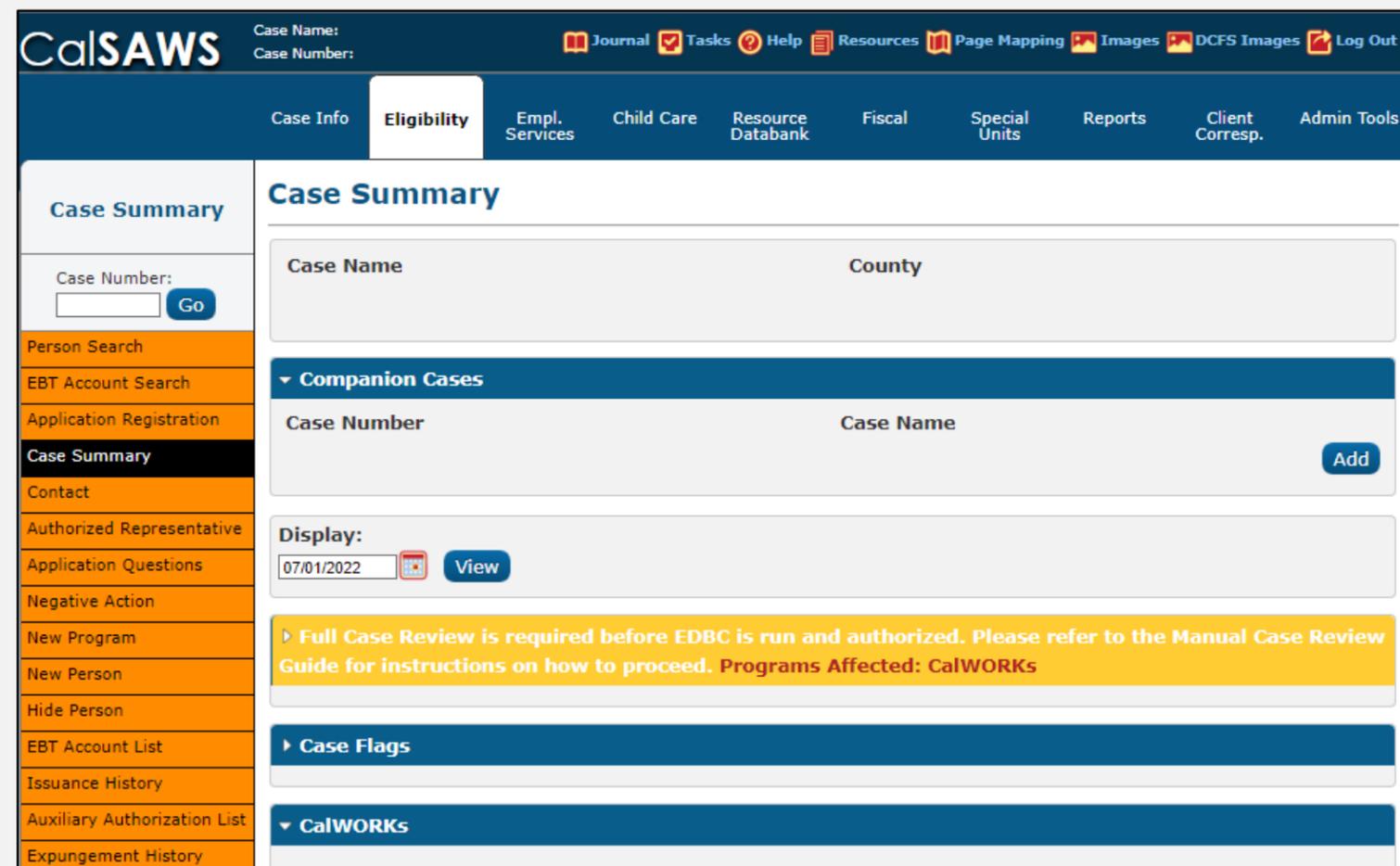
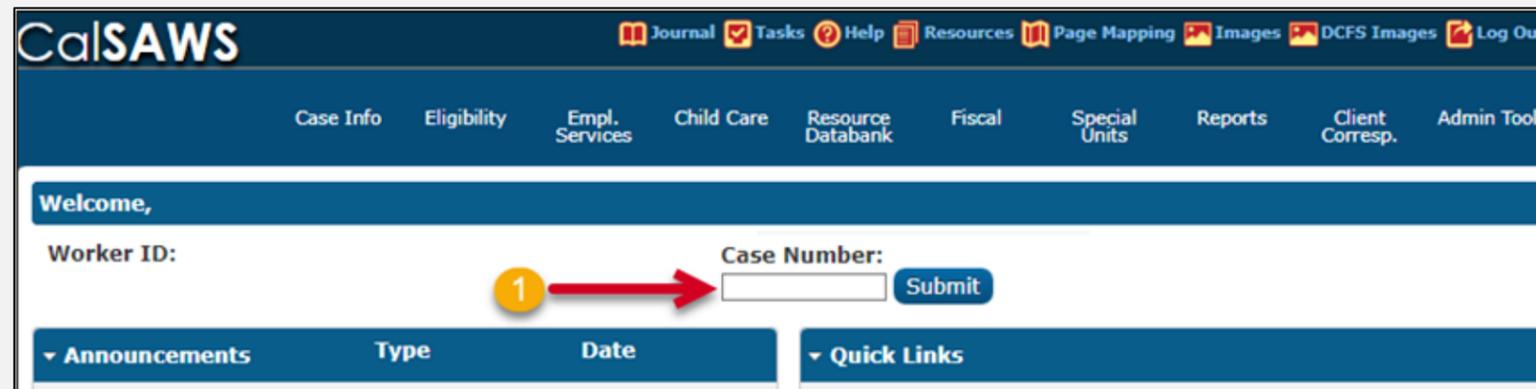
Steps to Clear Alert	Screenshot
<p>1 Log in to CalSAWS by entering your Username and Password</p>	

Steps to Clear Alert

- 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.

Screenshot

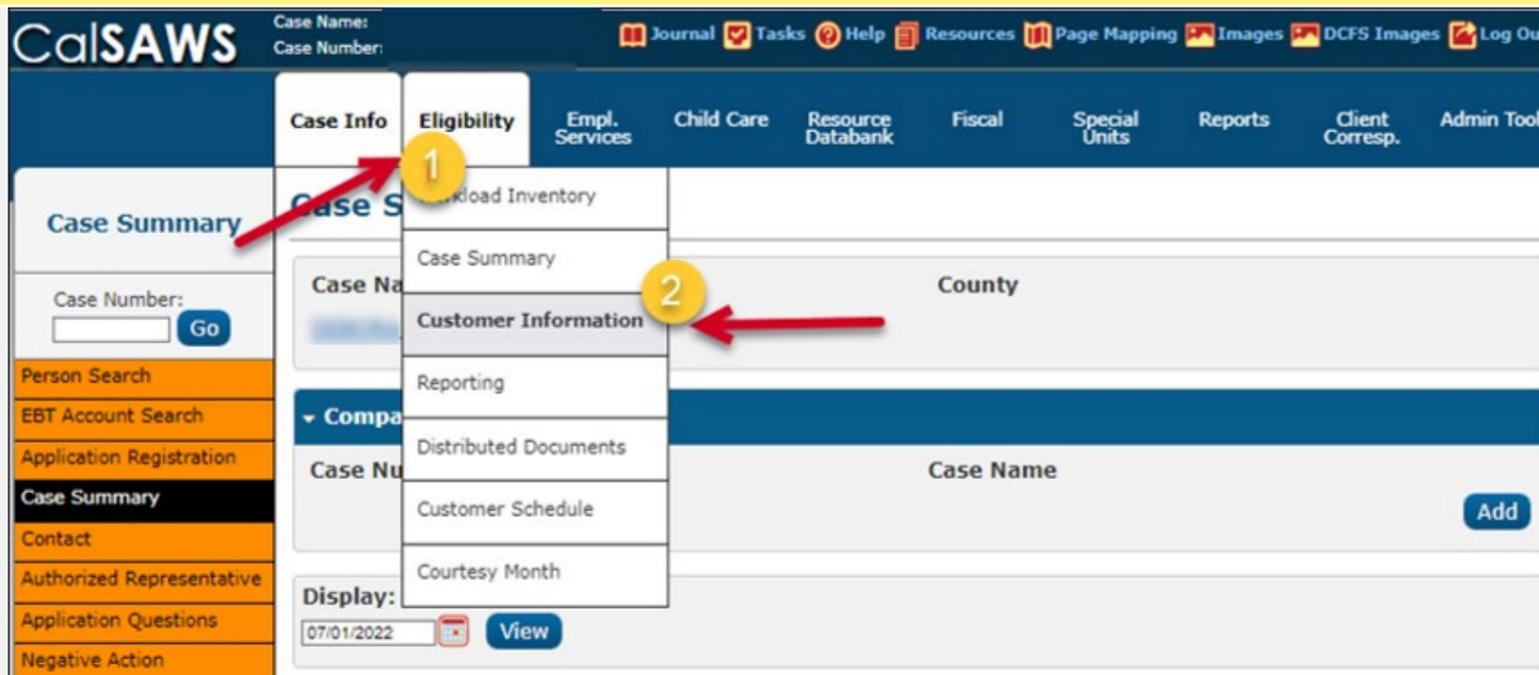


★ Note the **Yellow Banner** on the Case Summary Page

Steps to Clear Alert

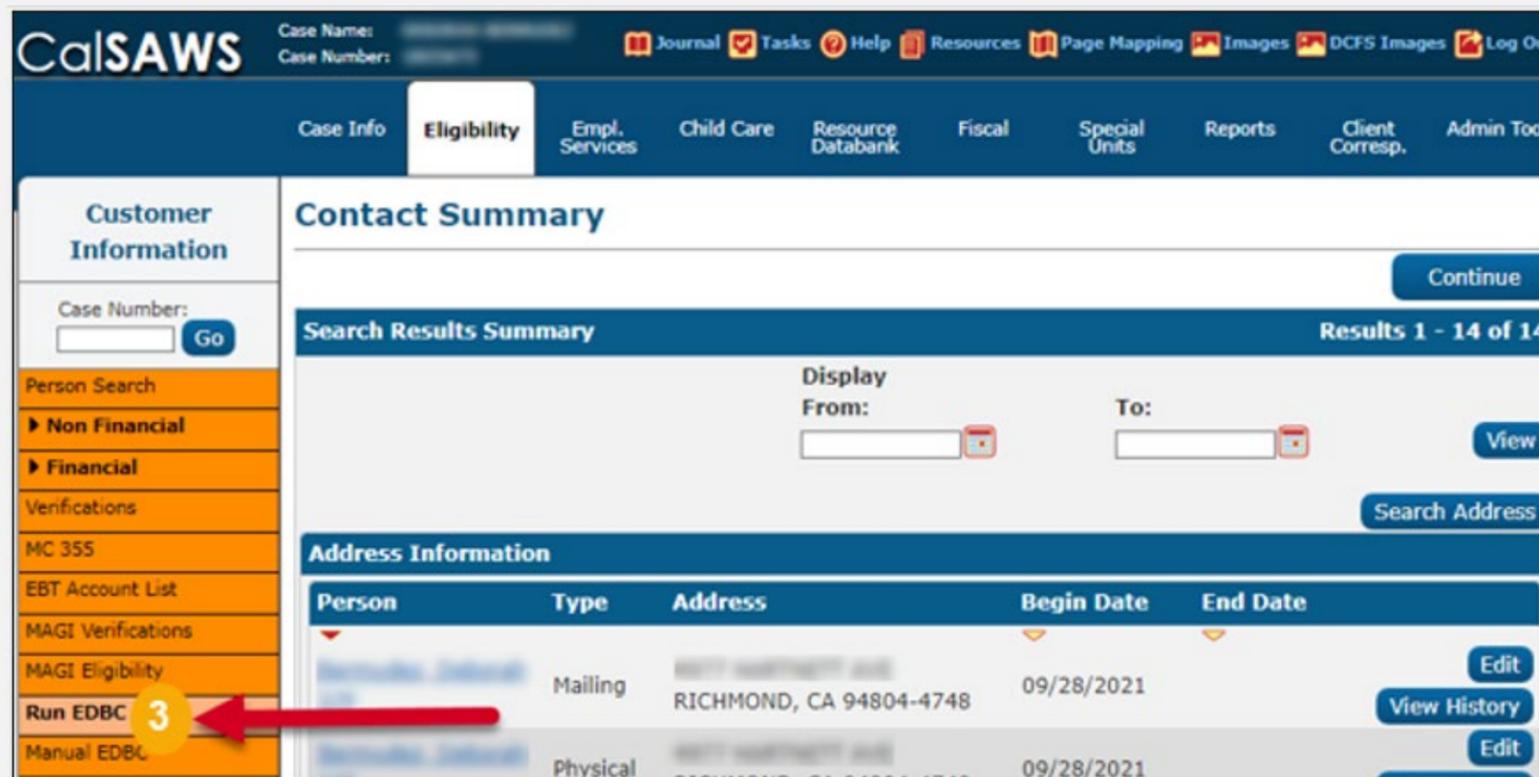
- 3 On the Case Summary Page:
1. Click on the **Eligibility** link on the Task navigator.
 2. Click on the **Customer Information** link on the Local navigator.

Screenshot



From the Contact Summary page:

3. Click on the **Run EDBC** link on the Task navigator.



Steps to Clear Alert

4 On the **Run EDBC** page:

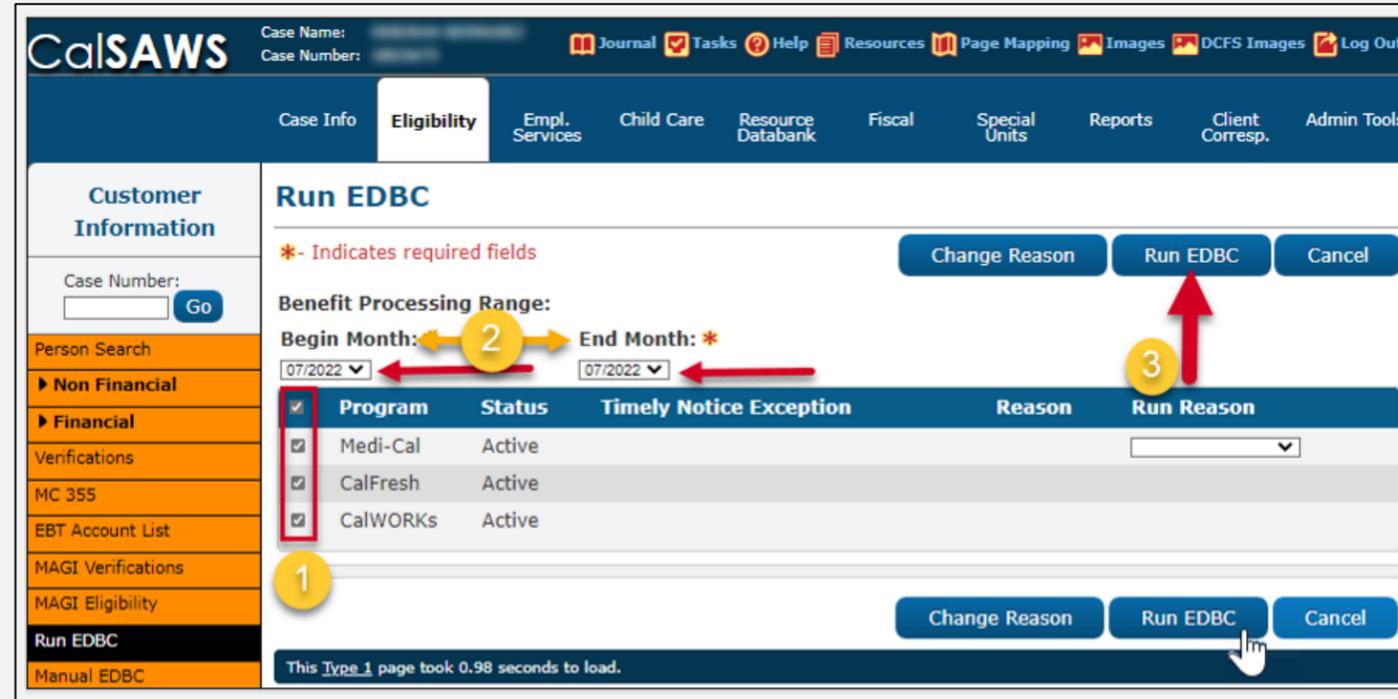
1. Select all applicable **Programs**.

★ 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.**

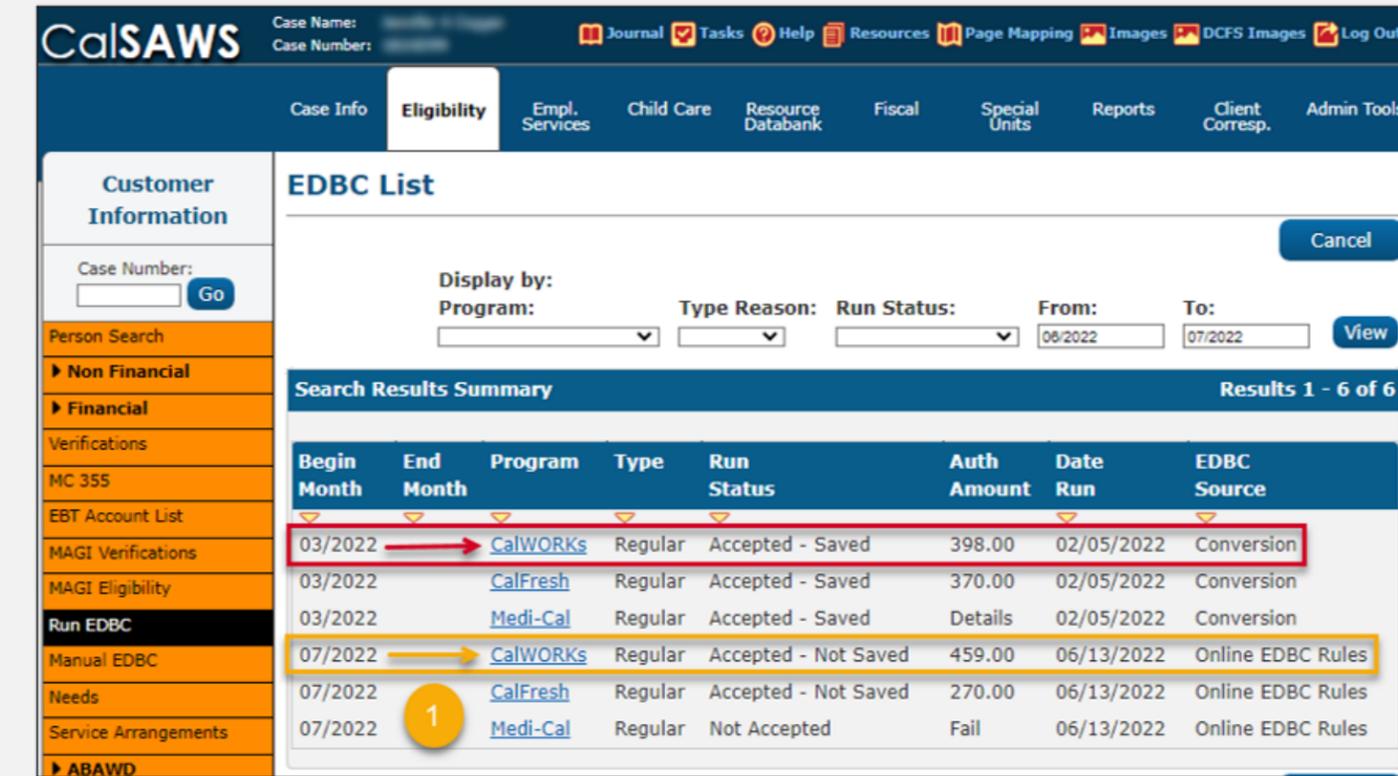
3. Click **Run EDBC**

Screenshot



5 In the **EDBC List** page, the user will click on the hyperlink for the most recent EDBC results to conduct a review.

1. Click the newly run **CalWORKs** hyperlink to navigate to the EDBC Summary Page.



Steps to Clear Alert

6 The EDBC Summary page will display the following eligibility criteria:

- Benefit month(s)
- EDBC Information
- Program Configuration
- Reporting Configuration
- Work Registration
- ABAWD Status
- Property Eligibility
- Income Eligibility
- Allotment
- WINS amount

As a previously saved CalWIN EDBC determination was **not** found, users will conduct a full case review to address any outstanding tasks, reports (IEVS), pending verifications, etc.

Screenshot

CalWORKs EDBC Summary

* - Indicates required fields

Change Reason Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/11/2022	Not Accepted	Carrie White

EDBC Information

Semi-Annual Reporting Period Begin Month: 05/2022

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 30 - CW-All Other Families (Fed)

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Deborah 37F		MEM		Active	
Gabriela 13F		MEM		Active	
Kevin 12M		MMO	FTP School Verif	Active	

Override Program Configuration

Steps to Clear Alert

7 Users will need to identify any mismatches in the following areas: income, household size, living expenses, (OPA) Other Program Assistance, Non-compliance/Sanctions/Penalties (dependent on program), etc.

Review all data collection pages that effect eligibility determination and update program/s accordingly.

Screenshot

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		\$ 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

8 Once this review is complete, the user will proceed to run EDBC for the desired program/s.

Users will:

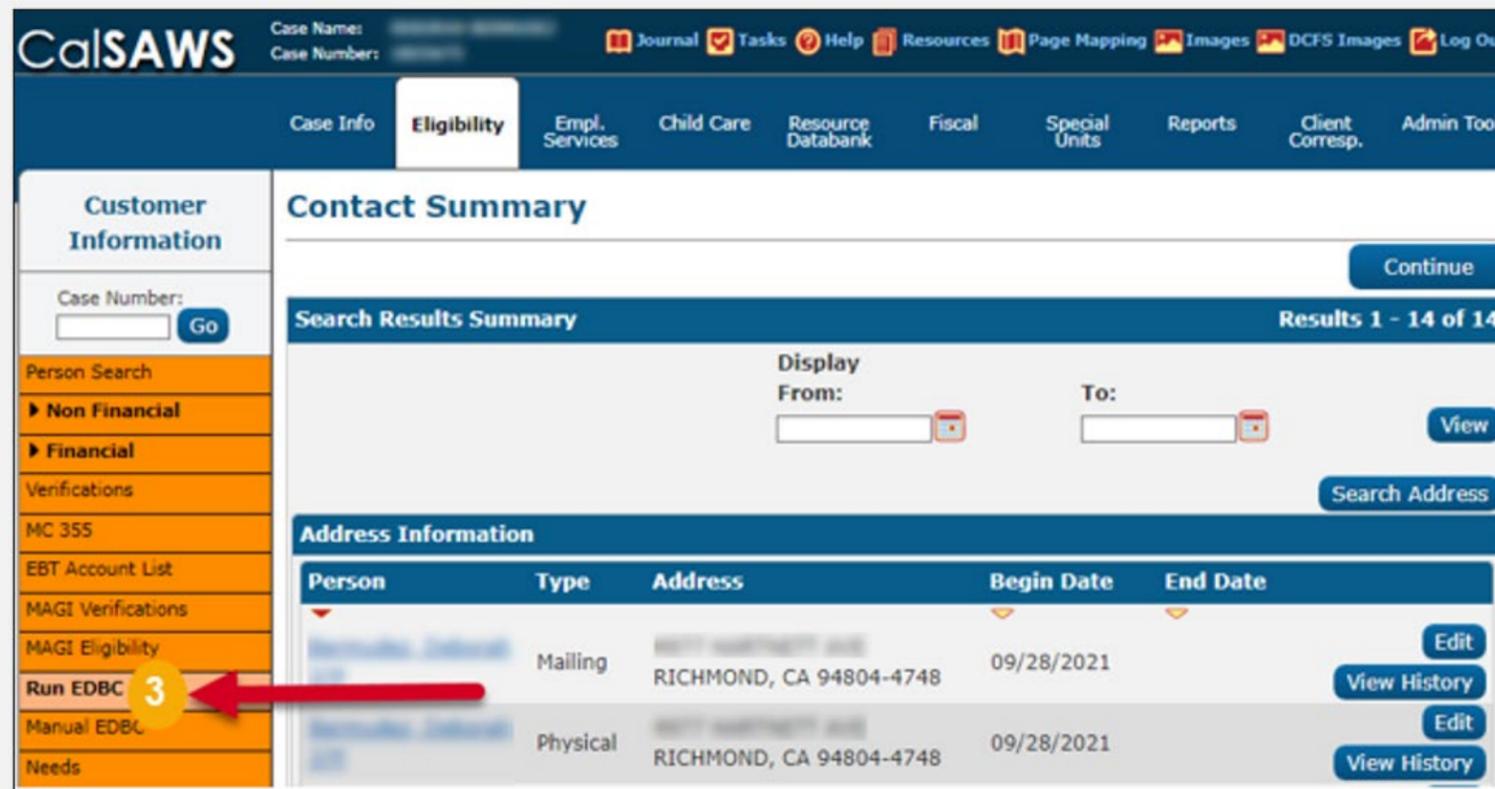
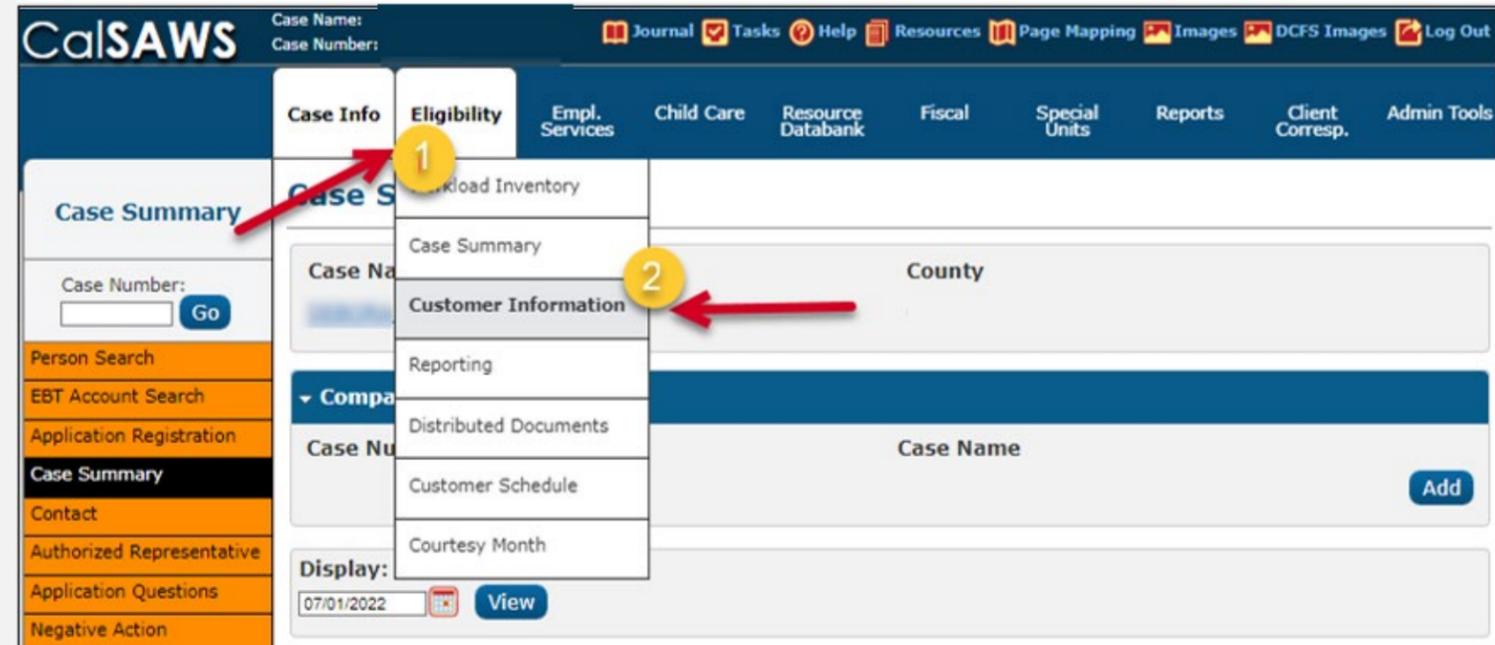
1. Click the **Eligibility** tab located at the top of the CalSAWS Navigation Bar
2. Click on the **Customer Information** on the local navigator.

This action will navigate the user to the **Contact Detail** page.

From the **Contact Summary** page:

3. Click on **Run EDBC** on the Task navigator.

Screenshot



Steps to Clear Alert

9 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.

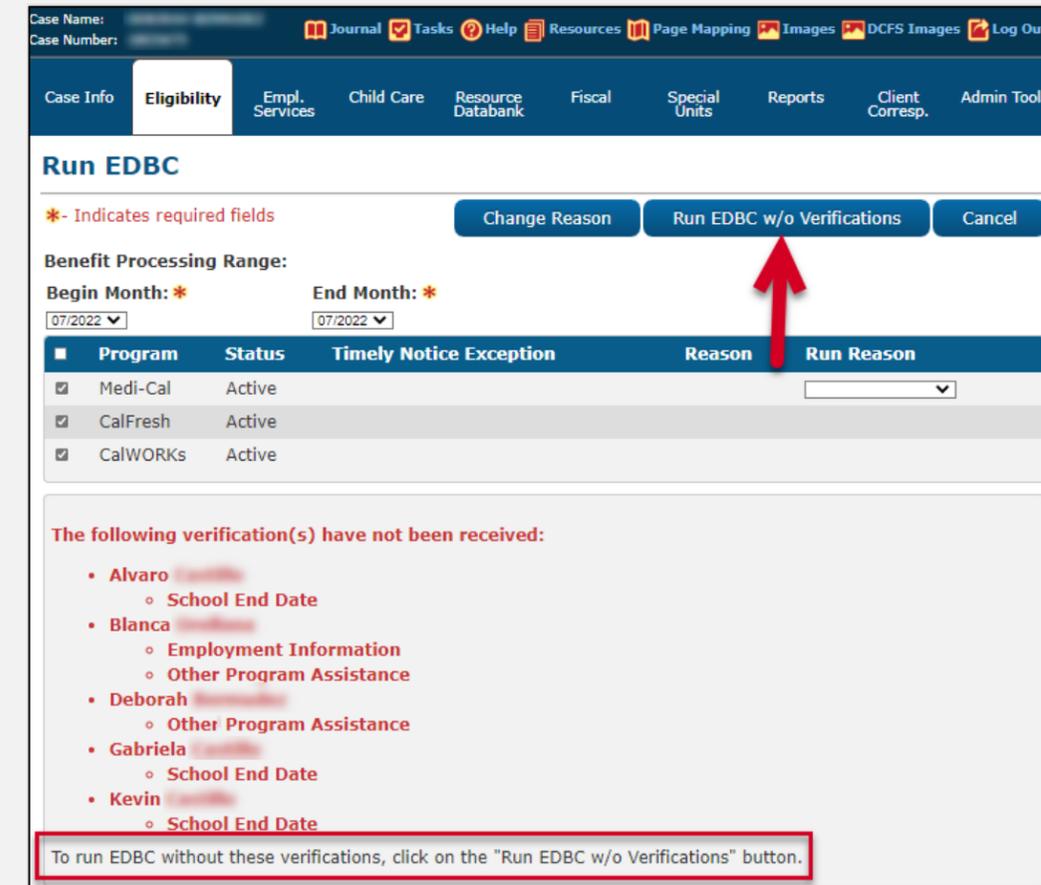
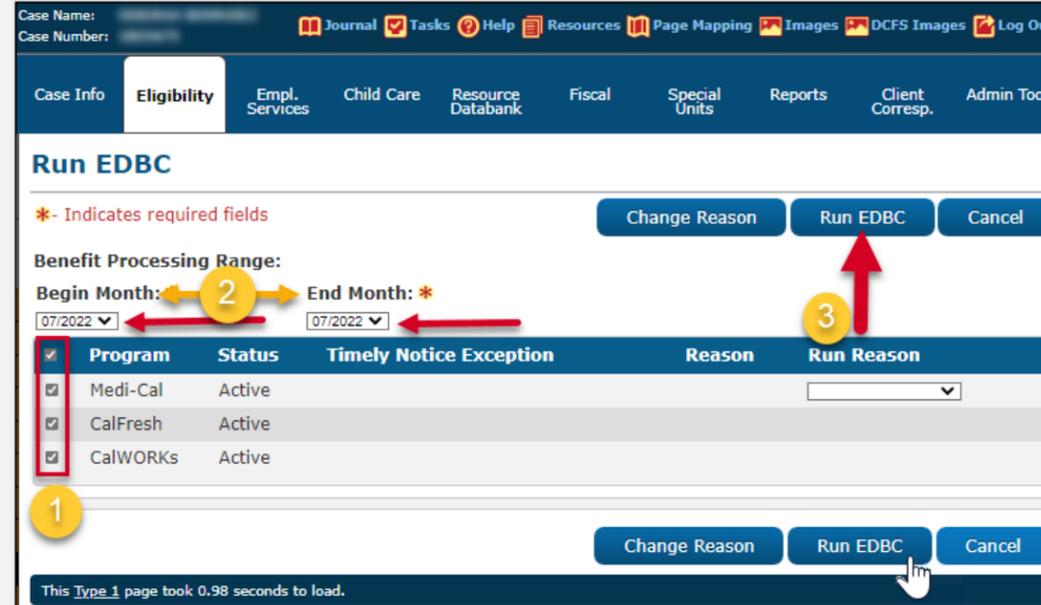
When running EDBC, there are two types of validations that a User may experience if eligibility criteria is missing or pending.

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 EDBC and remove the Yellow Banner, the pending verifications may result in a negative case action. Follow your county policy.

Screenshot



Steps to Clear Alert

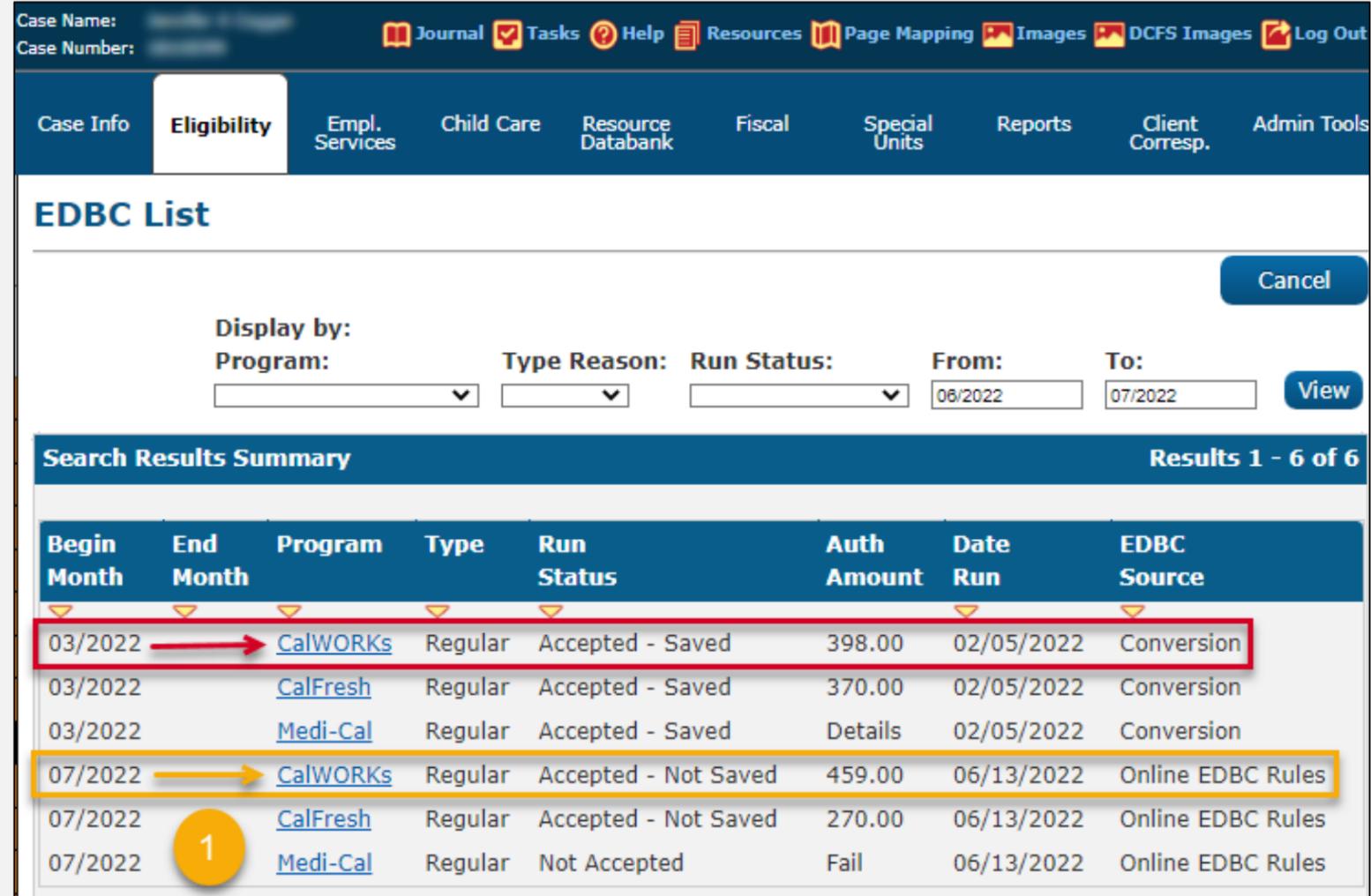
10 The **EDBC List** page will display the most recent EDBC results for all programs associated to the case.

★ If necessary, you can search for a specific budget by selecting the following criteria: Program, Type Reason, Run Status, From/To

1. Click on the hyperlink for the program (Medi-Cal). This will direct you to the **Medi-Cal EDBC Summary** page, where once can view the eligibility determination results.

 **(Note: The EDBC results that were requested will show a run status of “Not Accepted”)**

Screenshot



The screenshot shows the 'EDBC List' page in the CalSAWS system. At the top, there are navigation tabs: Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. Below the tabs, there are search filters for Program, Type Reason, Run Status, From, and To. A 'View' button is present next to the filters. Below the filters is a 'Search Results Summary' section showing 'Results 1 - 6 of 6'. The main table has columns: Begin Month, End Month, Program, Type, Run Status, Auth Amount, Date Run, and EDBC Source. The first row (03/2022) is highlighted with a red box and a red arrow pointing to the 'CalWORKs' program. The second row (07/2022) is highlighted with a yellow box and a yellow arrow pointing to the 'CalWORKs' program. A yellow circle with the number '1' is placed over the 'Medi-Cal' program in the last row.

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
03/2022		CalWORKs	Regular	Accepted - Saved	398.00	02/05/2022	Conversion
03/2022		CalFresh	Regular	Accepted - Saved	370.00	02/05/2022	Conversion
03/2022		Medi-Cal	Regular	Accepted - Saved	Details	02/05/2022	Conversion
07/2022		CalWORKs	Regular	Accepted - Not Saved	459.00	06/13/2022	Online EDBC Rules
07/2022		CalFresh	Regular	Accepted - Not Saved	270.00	06/13/2022	Online EDBC Rules
07/2022		Medi-Cal	Regular	Not Accepted	Fail	06/13/2022	Online EDBC Rules

Steps to Clear Alert

11 The **EDBC Summary** page will display the following:

- Benefit Month and Program Status
- EDBC Information
- Program Configuration
- Reporting Configuration
- Medi-Cal Summary

The user should conduct a review of both **Non-Financial & Financial** data collection pages and update, as necessary.

The EDBC results can be saved by clicking the **Accept** button located on the top right or bottom right of the summary. This will redirect you to the **EDBC List** page.

Screenshot

Case Name: [REDACTED]
Case Number: [REDACTED]

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

CalWORKs EDBC Summary

*- Indicates required fields Change Reason Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/11/2022	Not Accepted	Carrie White

EDBC Information

Semi-Annual Reporting Period Begin Month: 05/2022
Reporting Type Reason:
Type: Regular
Recalculation: No

Program Configuration

System Determination
EDBC Source: Online EDBC Rules
Aid Code: 30 - CW-All Other Families (Fed)
Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Deborah 37F	[REDACTED]	MEM		Active	
Gabriela 13F	[REDACTED]	MEM		Active	
Kevin 12M	[REDACTED]	MMO	FTP School Verif	Active	

Steps to Clear Alert

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.

Additional CalSAWS Job Aids are available in CalSAWS under the **Help Icon** on the Utilities navigator:

JA EDBC – Troubleshooting Incorrect Results
JA EDBC - Online Definitions and Troubleshooting

Screenshot

Assistance Unit MAP	\$	733.00
Assistance Unit Special Needs	\$	<u>0.00</u>
Aid Payment	\$	733.00

Aid Payment	Regular
Full Month Aid Payment	\$ 733.00
Dates to Prorate	1-31
Aid Payment	\$ 733.00
Combined Aid Payment	\$ 733.00
Final Aid Payment	\$ 733.00
Overridden Aid Payment	\$
	Override Payment
Penalties	- <u>0.00</u>
Potential Benefit	= 733.00
Previous Potential Benefit	- <u>0.00</u>
Overpayment Adjustment Amount	- <u>0.00</u>
Authorized Amount	= 733.00

Pay Code:

Delivery Method: *
Immediacy Indicator: *
Issuance Method: EBT



Steps to Clear Alert

12 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.

In the **Distributed Documents** Search:

Click on the hyperlink for the NOA with the “**Pending Review**” status to view the NOA and select a method of distribution. If the NOA is not reviewed it will go out due to an overnight batch process.

Screenshot

Case Name: [Redacted]
Case Number: [Redacted]

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

Distributed Documents Search

*- Indicates required fields

▶ Refine Your Search

Search Results Summary Results 1 - 4 of 4

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
06/11/2022 1:05 PM	NOA - CW - DS - NOT MEETING CHILD AGE RULE		CalWORKs	Pending Review	Details
06/11/2022 1:05 PM	NOA - MC - AP - APP REG MC FULL SCOPE NO SOC		Medi-Cal	Pending Review	Details
06/11/2022 1:05 PM	NOA - CF - TA - TCF APPROVED		CalFresh	Pending Review	Details
06/11/2022 1:05 PM	NOA - CW - DS - NO ELIGIBLE CHILD		CalWORKs	Pending Review	Details

This Type 1 page took 1.79 seconds to load.

Steps to Clear Alert

- 13 Users will be directed to a PDF preview of the NOA. Users will have the following options:
- **Append:** User can make limited edits to NOA if necessary
 - **Save and Print Locally:** User will save NOA to the case and will need to manually print the NOA for distribution.
 - **Save and Print Centrally:** User will save the NOA to the case and the NOA will be sent out by central printing during nightly batch.
 - **Reject:** User will reject the NOA, the NOA will still display in the case as a rejected status
 - **Cancel:** User can cancel, this will leave the NOA in a “pending review” status.

Select the appropriate status for the NOA. This will update the status in the **Distributed Document Search** page.

Once the NOA are reviewed, accepted, and saved, journal the actions taken according to navigate back to the **Case Summary** page.

- 14 The Yellow Banner will no longer appear on the case. The case review is complete!

Screenshot

