

Aid-Code Mismatch

Priority Level: 3

Programs Impacted: 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.

To clear the Yellow Banner, review the Aid-Code mismatch between the last saved and converted CalWIN EDBC. Based on the differences, Users will need to **confirm the results, and/or update the data collection records, as applicable**. The user will be required to take action based on county policy rules 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 | Aid-Code Mismatch | 06/30/2022  |                   | 3        |            |             |

Users may encounter a CalFresh program moving between Non-Assistance/Mixed Household CalFresh aid codes (for example, “09”) and a Public-Assistance CalFresh aid code (30, 32, 33, 3R, 91, 92, etc.). Users may also see a change in CalFresh aid codes in households moving to or from a Work Incentive Nutritional Supplement (WINS) program benefit (R4, R5, R6, R7, R8, R9). For Medi-Cal, any change in Aid-Code for an individual will flag the program/case with a Yellow Banner EDBC Mismatch.

**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 accurately to allow for a correct determination.

Example

Aid-Code Mismatch

| Steps To Clear Alert |                                                                                                                                                                                                                                                  | Screenshot |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 1                    | Log in to CalSAWS by entering your Username and Password                                                                                                                                                                                         |            |
| 2                    | <p>On the Homepage:</p> <p>1. Enter the case number and click on the submit button to be directed to the <b>Case Summary</b> page.</p> <p>★ Note: this step is not necessary if already in the <b>Case Summary</b> page for the desired case</p> |            |

Steps To Clear Alert

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

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number:  
Go

Person SearchEBT Account SearchApplication RegistrationCase SummaryContactAuthorized RepresentativeApplication QuestionsNegative ActionNew ProgramNew PersonHide PersonEBT Account ListIssuance HistoryAuxiliary Authorization ListExpungement HistoryChild Support CollectionsTime Limit Aid SummaryHousing SupportHome VisitingLegacy CaseConfidentialityICT SummaryIAT SummaryMAGI Case SearchCustomer Contact HistorySB 87Invoice HistoryLinkages

Case Summary

Case NameCounty

Companion Cases

Case NumberCase NameAdd

Display:  
09/01/2022View

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: CalFresh.

Child Care

CalWORKs

CalFresh

Worker:  
Worker ID:  
Program Status:Active  
RE Due Month:11/2022Re-Evaluate  
Reporting Type:Semi-Annual Reporting  
SAR Due Month:05/2022  
Aid Code:R4-WINS Non-Two-Parent  
Meets ESAP Criteria:

Primary Applicant/Recipient:  
Language:English  
Phone Number:  
Email:  
Payee:  
Application Date:05/01/2019

3

On the Case Summary Page:

- Click on the **Eligibility** tab on the Global Navigator
- Click on the **Customer Information** link on the Local Navigator

Screenshot

The screenshot shows the CalSAWS Case Summary page. The Global Navigator on the left has the 'Eligibility' tab highlighted with a red arrow and a yellow circle labeled '1'. The Local Navigator on the right has the 'Customer Information' link highlighted with a red arrow and a yellow circle labeled '2'.

From the Contact Summary page:

- Click on the **Run EDBC** tab on the Task Navigator.

Screenshot

The screenshot shows the CalSAWS Contact Summary page. The Task Navigator on the left has the 'Run EDBC' tab highlighted with a red arrow and a yellow circle labeled '3'.

Page 4

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**
- ⚠

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.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:  
 Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Run EDBC

\*- Indicates required fields

Change ReasonRun EDBCCancel

Benefit Processing Range:

Begin Month: \*End Month: \*

09/202209/2022

1

| <input checked="" type="checkbox"/> | Program  | Status | Timely Notice Exception | Reason | Run Reason |
|-------------------------------------|----------|--------|-------------------------|--------|------------|
| <input checked="" type="checkbox"/> | CalFresh | Active |                         |        |            |
| <input checked="" type="checkbox"/> | Medi-Cal | Active |                         |        |            |

2

3

Change ReasonRun EDBCCancel

This Type 1 page took 0.68 seconds to load.

Steps To Clear Alert

When running EDBC, there are two types of validations; Hard and Soft 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 business processes and procedures.

★ **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 and/or potential over issuance. Follow your county business processes and procedures.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:  
 Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Run EDBC

\*- Indicates required fields

Change ReasonRun EDBC w/o VerificationsCancel

Benefit Processing Range:

Begin Month: \*09/2022End Month: \*09/2022

|                                     | Program  | Status | Timely Notice Exception | Reason | Run Reason |
|-------------------------------------|----------|--------|-------------------------|--------|------------|
| <input checked="" type="checkbox"/> | CalFresh | Active |                         |        |            |
| <input checked="" type="checkbox"/> | Medi-Cal | Active |                         |        |            |

There is no Absent/Unmarried Parent record for the following child(ren):

There is no ongoing School Attendance record for the following child(ren):

The following verification(s) have not been received:

To run EDBC without these verifications, click on the "Run EDBC w/o Verifications" button.

Change ReasonRun EDBC w/o VerificationsCancel

This Type 1 page took 1.08 seconds to load.

Steps To Clear Alert

- 5
- Compare the Aid-Code mismatch details with the last CalWIN **Conversion** EDBC run.

Staff will need to identify if there are any mismatches in the following Data Collection Pages: 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 CalFresh Budget by first clicking the **CalFresh link for 02/2022 (circled in yellow)**. Compare the converted CalFresh aid code against the new CalSAWS Budget by clicking the **CalFresh link for 9/2022 (red arrow)**.

Clicking on the CalFresh hyperlink in the Program column will navigate Users to the CalFresh EDBC Summary page.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:  
  
Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

EDBC List

Display by:  
Program:  
Type Reason:  
Run Status:  
From:  
To:

Cancel

View

Search Results SummaryResults 1 - 5 of 5

| Begin Month | End Month | Program  | Type    | Run Status       | Auth Amount | Date Run   | EDBC Source       |
|-------------|-----------|----------|---------|------------------|-------------|------------|-------------------|
| 07/2019     |           | CalWORKs | Regular | Accepted - Saved | Fail        | 06/12/2019 | Conversion        |
| 02/2022     |           | CalFresh | Regular | Accepted - Saved | 319.00      | 12/27/2021 | Conversion        |
| 05/2022     |           | Medi-Cal | Regular | Accepted - Saved | Details     | 04/14/2022 | Batch EDBC Rules  |
| 09/2022     |           | CalFresh | Regular | Not Accepted     | 319.00      | 07/29/2022 | Online EDBC Rules |
| 09/2022     |           | Medi-Cal | Regular | Not Accepted     | Details     | 07/29/2022 | Online EDBC Rules |

Steps To Clear Alert

6 In the example to the right, the converted 2/2022 CalFresh EDBC Summary page displays the CalFresh budget aid code of **R4-WINS Non-Two-Parent**. The new CalSAWS budget on the CalFresh EDBC Summary page for 9/2022 shows a different aid code of **09 – CalFresh**.

In the 2/2022 Work Registration block, the CalFresh household members do not show a Work Registration status. Alternatively, the new CalSAWS 9/2022 budget shows an **Exempt** Work Registration status.

★ **Note:** If the status in the Work Registration block does not match, Users should review the **Work Registration List** page.

On the CalFresh EDBC Summary page:

- 1. Click on the Income tab located on the Task Navigator. This will navigate Users to the Income List page.

Screenshot

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

CalFresh EDBC Summary

★ - Indicates required fields

| Begin Month | End Month | Run Date   | Run Status       | Accepted By |
|-------------|-----------|------------|------------------|-------------|
| 02/2022     |           | 12/27/2021 | Accepted - Saved |             |

EDBC Information

Semi-Annual Reporting Period Begin Month: 05/2022

Reporting Type Reason: Type: Regular Recalculation: No

Regular Program Configuration

System Determination EDBC Source: Conversion

Aid Code: R4-WINS Non-Two-Parent

Program Status: Active

Note: Overridden rows are in bold.

| Name | DOB | Role | Role Reason | Status | Status Reason   |
|------|-----|------|-------------|--------|-----------------|
|      |     | MEM  |             | Active |                 |
|      |     | MEM  |             | Active |                 |
|      |     | MEM  |             | Denied | Out of the Home |
|      |     | MEM  |             | Active |                 |
|      |     | MEM  |             | Denied | Out of the Home |

Reporting Configuration

Work Registration

| Name          | Status | Status Reason |
|---------------|--------|---------------|
| No Data Found |        |               |

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

CalFresh EDBC Summary

★ - Indicates required fields

Change Reason Accept Cancel

| Begin Month | End Month | Run Date   | Run Status   | Accepted By |
|-------------|-----------|------------|--------------|-------------|
| 09/2022     |           | 08/02/2022 | Not Accepted |             |

EDBC Information

Semi-Annual Reporting Period Begin Month: 06/2022

Reporting Type Reason: Type: Regular Recalculation: No

Regular Program Configuration

System Determination EDBC Source: Online EDBC Rules

Aid Code: 09 - CalFresh

Program Status: Active

SUAS Eligible: Yes

Program Type: Regular

Note: Overridden rows are in bold.

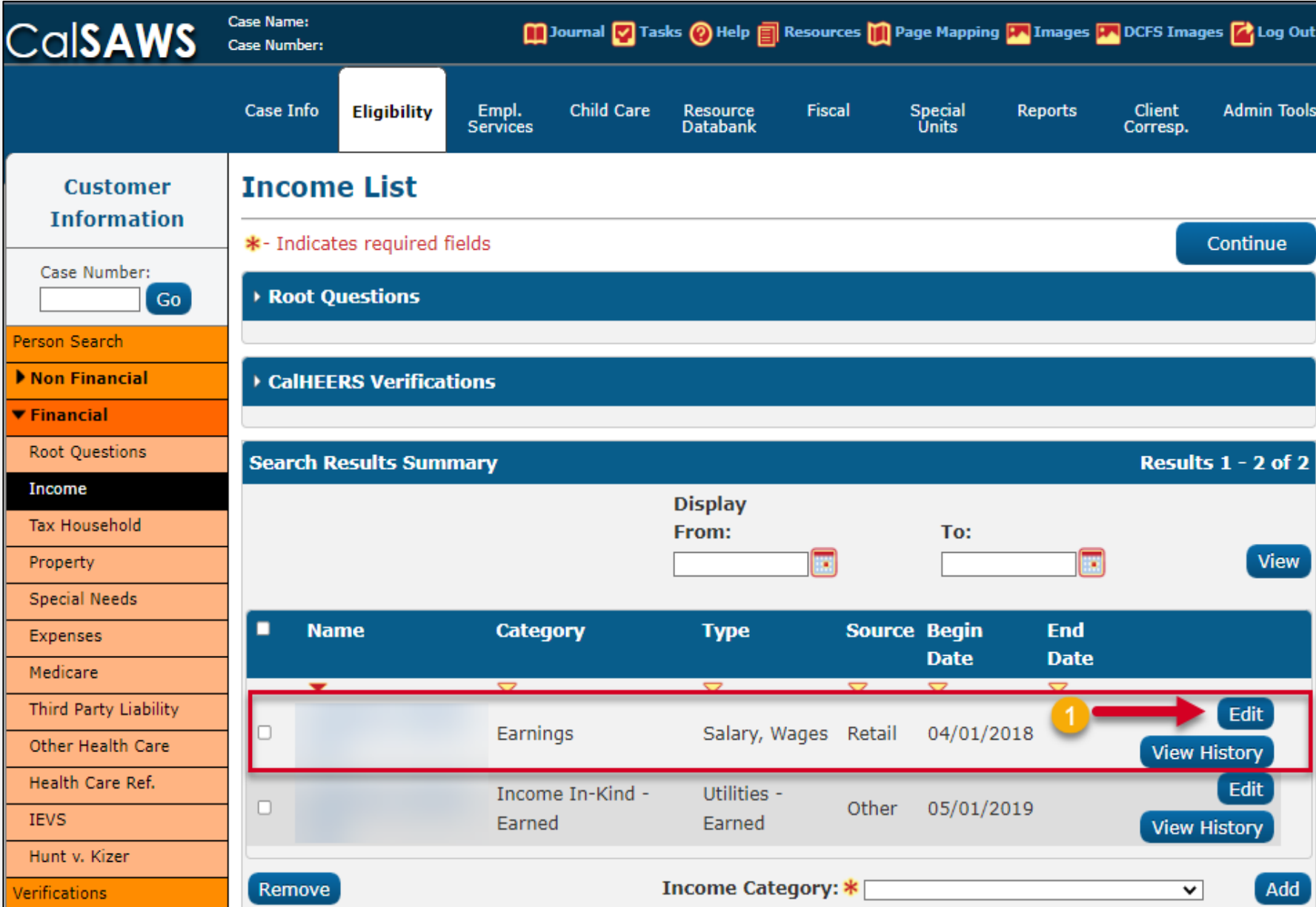
| Name | DOB | Role | Role Reason | Status | Status Reason |
|------|-----|------|-------------|--------|---------------|
|      |     | MEM  |             | Active |               |
|      |     | MEM  |             | Active |               |
|      |     | MEM  |             | Active |               |

Override Program Configuration

Reporting Configuration

Work Registration

| Name | Status | Status Reason                              |
|------|--------|--------------------------------------------|
|      | Exempt | Weekly Earnings = Fed Minimum Wage x 30hrs |
|      | Exempt | Child under 16                             |
|      | Exempt | Child under 16                             |

| Steps To Clear Alert |                                                                                                                                                             | Screenshot                                                                           |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 7                    | <p>On the <b>Income List</b> page, review all current income records.</p> <p>1) Click the <b>Edit</b> button for the Category of Earnings income entry.</p> |  |

Steps To Clear Alert

On the **Income Detail** page, there are two hyperlinked Amount entries in the Income Amounts section under the Program field, one for Cash / CalFresh and the other for Medi-Cal.

- 1) Click the **Edit** button on the Cash / CalFresh income record.

Screenshot

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

Customer Information

Case Number:  

Go

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

Income Detail

\* - Indicates required fields

Save and Return

Cancel

Name: \*

Category: Earnings

Type: \* Salary, Wages

Employment: Retail Remove

Frequency: \* Monthly

Description: CalWIN Conversion Income Type: Earnings, wages, salaries, bonuses, commissions, military pay|| EMPLOYER BUSINESS

Shared with RDP

Pickle Eligibility

Income Amounts \*

Display Program: \* From: 09/2022 To: 09/2022 View

| Program                                  | Amount                   | Begin Date | End Date                     |
|------------------------------------------|--------------------------|------------|------------------------------|
| <input type="checkbox"/> Cash / CalFresh | <a href="#">1,691.26</a> | 11/01/2021 | <div>1</div> <div>Edit</div> |
| <input type="checkbox"/> Medi-Cal        | <a href="#">1,442.63</a> | 06/01/2021 | <div>Edit</div>              |
| Actuals (TMC / Pickle)                   | 1,442.63                 | 06/01/2021 |                              |

Remove

Steps To Clear Alert

Users should review all listed income amounts for accuracy. Users can select and/or adjust between proxy or actual work hours.

On the **Income Amount Detail** page:

- 1. Select **Actual** from the **Work Hours** drop list and edit the **<Number of Hours>** in the **Work Hours** field.
  - 2. Enter the appropriate **<Date>** in the **Begin Date** field.
  - 3. Enter the appropriate **<Date>** in the **End Date** field, if applicable.
- ★ **Note:** The System prorates the actual hours based on the Begin and End dates entered.
- 4. Select a **<Status>** from the **Verified** drop list.
  - 5. Click the **Save and Return** button on the **Income Amount Detail** page.

★ **Note:** The System uses a value of 0 when calculating the WINS Weekly Hours if you select Actual and enter a value of 0 or no value at all in the Work Hours field.

The System does not automatically default to using the proxy calculation when no selection is made. Once Proxy is selected, the proxy calculation divides the income amount by the State minimum wage plus \$0.50 to determine the WINS Weekly Hours for the income record.

★ **Note:** The proxy calculation for the WINS weekly hours must not be used on a regular basis; it should only be used when the actual hours worked information cannot be obtained from the CalFresh household.

Additional WINS information can be found in the **CalSAWS Quick Guide – WINS** in LMS.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:  
Go

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Income Amount Detail

\*- Indicates required fields

Save and Add AnotherSave and ReturnCancel

Program: Cash / CalFresh

Change Reason

New Change Reason: \*  
- Select -

New Reported Date: \*  
11/01/2021

Change Reason:  
Participant Provided - Written

Reported Date:  
11/01/2021

View

Average Calculator

| Amount                            | Date Received | Count in Average | Work Hours  |
|-----------------------------------|---------------|------------------|-------------|
| <input type="checkbox"/> 1,691.26 | 11/01/2021    | No               | Actual 23.0 |
| <input type="checkbox"/>          |               | Yes              | Actual      |
|                                   |               |                  | Proxy       |

Add

Remove

Average Amount:  
0

Reported Amount: \*  
0

Unreported Amount:  
0.00

Begin Date: \*  
11/01/2021

End Date:  
11/01/2021

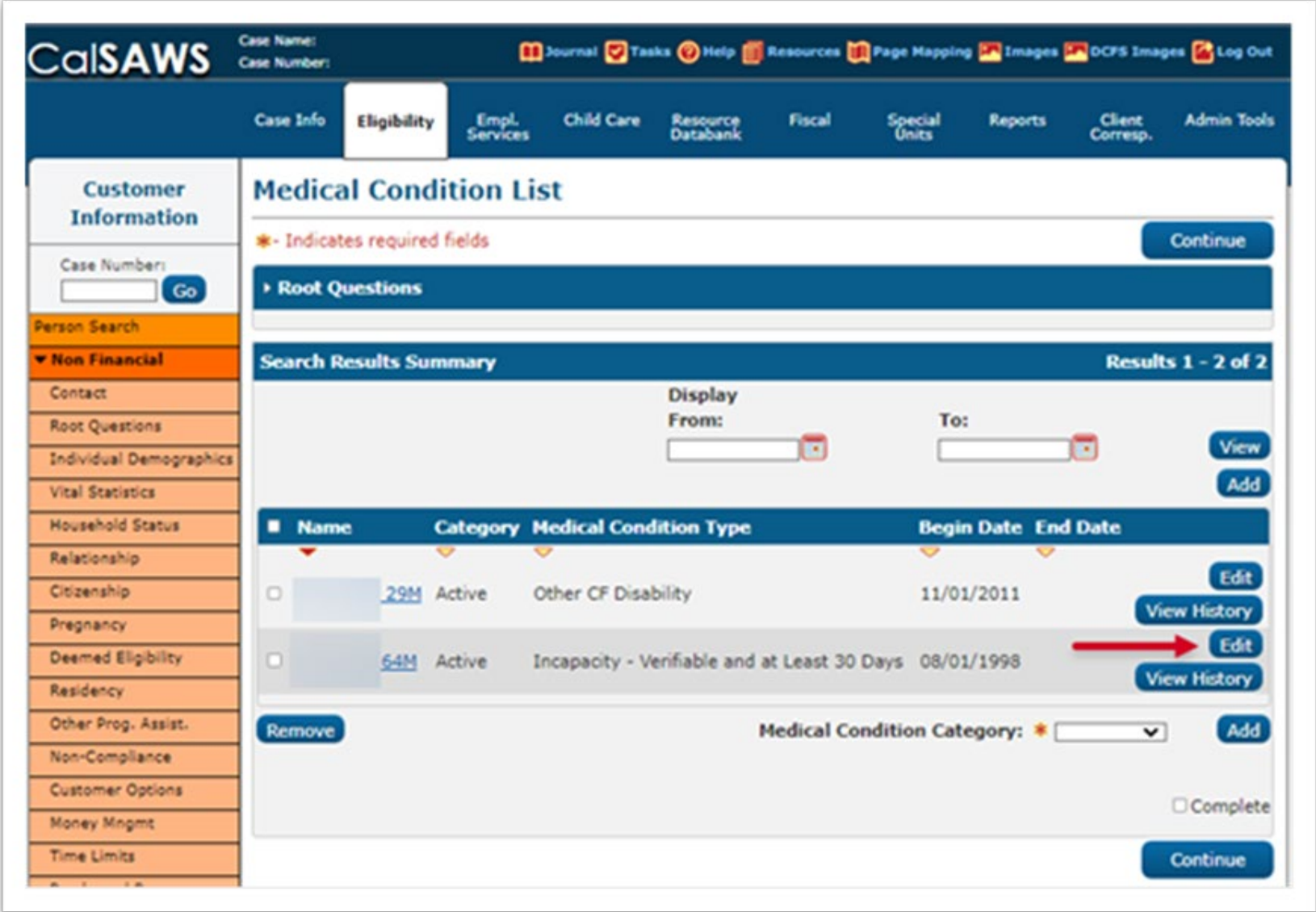
Verified: \*  
Verified

View

Save and Add AnotherSave and ReturnCancel

Last Updated On 04/10/2022 12:00:00 AM By: 07

This Type 1 page took 0.45 seconds to load.

| Steps To Clear Alert |                                                                                                                                                                                                            | Screenshot                                                                           |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 8                    | <p>On the <b>Medical Condition List</b> page, review all current medical condition records.</p> <p>1. Click the <b>Edit</b> button for the person record whose Medical Condition Type requires review.</p> |  |

Steps To Clear Alert

Users should review all listed medical condition records for accuracy. Users can select and/or adjust the Medical Condition Type using the dropdown menu.

On the **Medical Condition Detail** page:

- 1. Under the **Medical Condition Type** section, select the appropriate choice from the drop-down menu based on the case info and county process.
- 2. Review remaining mandatory fields and make any adjustments, if applicable.
- 3. Click the **Save and Return** button.

The following Job Aids are available to assist in CalSAWS located by clicking **Help** in the Utilities navigation bar:

- **JA Medical Condition Detail - Disabled or SP-DDSD**
- **JA Medical Condition Detail - Fry v Saenz**

Screenshot

The screenshot displays the CalSAWS Medical Condition Detail page. The interface includes a top navigation bar with links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. A secondary navigation bar contains tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The left sidebar lists various categories under 'Customer Information', with 'Medical Condition' currently selected. The main content area is titled 'Medical Condition Detail' and features a 'Save and Return' button at the top right, highlighted by a red arrow. Below this, the 'Change Reason' section includes fields for 'New Change Reason' (set to 'Participant Provided - Written') and 'New Reported Date' (03/01/2022). The 'Medical Condition Type' dropdown menu is open, showing options such as 'Incapacity - Verifiable and at Least 30 Days', 'FC/KG - Physical or Mental Disability', 'Fry v. Saenz Disability', and 'SSA Disabled'. Other fields include 'Name' (64M), 'Medical Condition Category' (Active), 'DDSD Re-Exam Date', 'Verified' (Verified), 'Does this person need care so that...', 'Does this person need help with act...', 'Does this person work and have medical expenses that are needed to help them keep working?', 'Begin Date' (08/01/1998), 'End Date', and 'Expected Length of Condition' (30 days or more). The page footer indicates it was last updated on 04/09/2022 at 12:00:00 AM by user 07.

| Steps To Clear Alert |                                                                                                                                                                                                                                                                                                                                                                           | Screenshot                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |             |        |                         |      |             |        |               |                  |     |     |  |        |  |      |                         |      |             |        |               |                  |          |     |  |        |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--------|-------------------------|------|-------------|--------|---------------|------------------|-----|-----|--|--------|--|------|-------------------------|------|-------------|--------|---------------|------------------|----------|-----|--|--------|
| 9                    | <p>A single case must be established in CalSAWS for a household who contains at least one individual who is receiving Long Term Care (LTC) and other household members are receiving MediCal.</p> <p>Separating the individual receiving LTC onto their own individual case in CalSAWS will result in incorrect eligibility determinations for each household member.</p> | <div><div><div>Case Info</div><div>Eligibility</div><div>Empl. Services</div><div>Child Care</div><div>Resource Databank</div><div>Fiscal</div><div>Special Units</div><div>Reports</div><div>Client Corresp.</div><div>Admin Tools</div></div><div><div>10/01/2022</div><div>View</div></div></div> <div><div>New Program</div><div>New Person</div><div>Hide Person</div><div>EBT Account List</div><div>Issuance History</div><div>Auxiliary Authorization List</div><div>Expungement History</div><div>Child Support Collections</div><div>Time Limit Aid Summary</div><div>Housing Support</div><div>Home Visiting</div><div>Legacy Case</div><div>Confidentiality</div><div>ICT Summary</div><div>IAT Summary</div><div>MAGI Case Search</div><div>Customer Contact History</div><div>SB 87</div><div>Invoice History</div><div>Linkages</div><div>General Ledger</div><div>Valuable History</div><div>Point Of Service</div><div>Case Copy List</div></div>                                                                                                                                                                                                                                                                                                                                                                                   |             |        |                         |      |             |        |               |                  |     |     |  |        |  |      |                         |      |             |        |               |                  |          |     |  |        |
|                      |                                                                                                                                                                                                                                                                                                                                                                           | <div><div><div><div>▼ Medi-Cal #1</div><div><div>Worker:</div><div>Worker ID:</div><div>Program Status:</div><div>RE Due Month:</div></div><div><div>Active</div><div>03/2023</div><div>Re-Evaluate</div></div><div><div>Primary Applicant/Recipient:</div><div>Language:</div><div>Phone Number:</div><div>Email:</div><div>Authorized Representative(s)</div><div>Application Date:</div></div></div><div><table><tr><th>Name</th><th>Requested Medi-Cal Type</th><th>Role</th><th>Role Reason</th><th>Status</th><th>Status Reason</th></tr><tr><td>▶ <div>87M</div></td><td>LTC</td><td>MEM</td><td></td><td>Active</td><td></td></tr></table><div>View Details</div></div></div><div><div><div><div>▼ Medi-Cal #2</div><div><div>Worker:</div><div>Worker ID:</div><div>Program Status:</div><div>RE Due Month:</div></div><div><div>Active</div><div>08/2023</div><div>Re-Evaluate</div></div><div><div>Primary Applicant/Recipient:</div><div>Language:</div><div>Phone Number:</div><div>Email:</div><div>Application Date:</div></div></div><div><table><tr><th>Name</th><th>Requested Medi-Cal Type</th><th>Role</th><th>Role Reason</th><th>Status</th><th>Status Reason</th></tr><tr><td>▶ <div>83F</div></td><td>Medi-Cal</td><td>MEM</td><td></td><td>Active</td><td></td></tr></table><div>View Details</div></div></div></div></div> |             | Name   | Requested Medi-Cal Type | Role | Role Reason | Status | Status Reason | ▶ <div>87M</div> | LTC | MEM |  | Active |  | Name | Requested Medi-Cal Type | Role | Role Reason | Status | Status Reason | ▶ <div>83F</div> | Medi-Cal | MEM |  | Active |
| Name                 | Requested Medi-Cal Type                                                                                                                                                                                                                                                                                                                                                   | Role                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Role Reason | Status | Status Reason           |      |             |        |               |                  |     |     |  |        |  |      |                         |      |             |        |               |                  |          |     |  |        |
| ▶ <div>87M</div>     | LTC                                                                                                                                                                                                                                                                                                                                                                       | MEM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |             | Active |                         |      |             |        |               |                  |     |     |  |        |  |      |                         |      |             |        |               |                  |          |     |  |        |
| Name                 | Requested Medi-Cal Type                                                                                                                                                                                                                                                                                                                                                   | Role                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Role Reason | Status | Status Reason           |      |             |        |               |                  |     |     |  |        |  |      |                         |      |             |        |               |                  |          |     |  |        |
| ▶ <div>83F</div>     | Medi-Cal                                                                                                                                                                                                                                                                                                                                                                  | MEM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |             | Active |                         |      |             |        |               |                  |     |     |  |        |  |      |                         |      |             |        |               |                  |          |     |  |        |

Steps To Clear Alert

On the Run EDBC page, both Medi-Cal programs must be selected to run EDBC simultaneously for the system logic to allocate income and property appropriately in the eligibility determination.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagingLog Out

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Customer Information

Case Number:  
 Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Run EDBC

\*- Indicates required fields

Change ReasonRun EDBCCancel

Benefit Processing Range:

Begin Month: \*End Month: \*

10/202210/2022

| Program     | Status | Timely Notice Exception | Reason | Run Reason |
|-------------|--------|-------------------------|--------|------------|
| Medi-Cal #1 | Active |                         |        |            |
| Medi-Cal #2 | Active |                         |        |            |

Change ReasonRun EDBCCancel

This Type 1 page took 0.77 seconds to load.

Steps To Clear Alert

In this example, if the household's eligibility was determined in two separate CalWIN cases, both cases will convert to CalSAWS. These cases in CalSAWS must be combined into a single case record.

The Case Summary page allows users to view companion cases associated with the case. Note that companion cases are not automatically added to a case, they must be added manually.

1. Identify the case numbers for each spouse and LTC case and determine which case to establish as the master record.
2. On the case chosen to remain open, place the cursor over **Eligibility** on the Global navigation bar and select **Case Summary** from the Local navigator.
3. Click the **New Program** link on the Task navigation bar to access the Program Detail page.
4. Select the Medi-Cal program under the Select Program dropdown menu and click the **Go** button to navigate to the New/Reapplication Detail page.
5. Ensure the appropriate details are entered (e.g., Application Date, Requested Medi-Cal Type, etc.) and check the box next to the name of the appropriate spouse for the newly added program and click the **Save and Return** button.
6. Continue forward until CalSAWS navigates the user back to the **Case Summary** page.
7. Place the cursor over **Eligibility** on the Global navigation bar and select **Customer Information** from the Local navigator.
8. Review the data collection pages to ensure that the appropriate information is available for the newly added spouse and update pages, as necessary.
9. Click the **Run EDBC** link on the Task navigation bar to access the Run EDBC page.

Screenshot

CalSAWS

Case Name:  
Case Number:

Journal

Tasks

Help

Resources

Page Mapping

Imaging

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

Case Summary

ImagesCaptureGenerate Coversheet

Case Name

County

Case Name

Butte

Companion Cases

Case Number

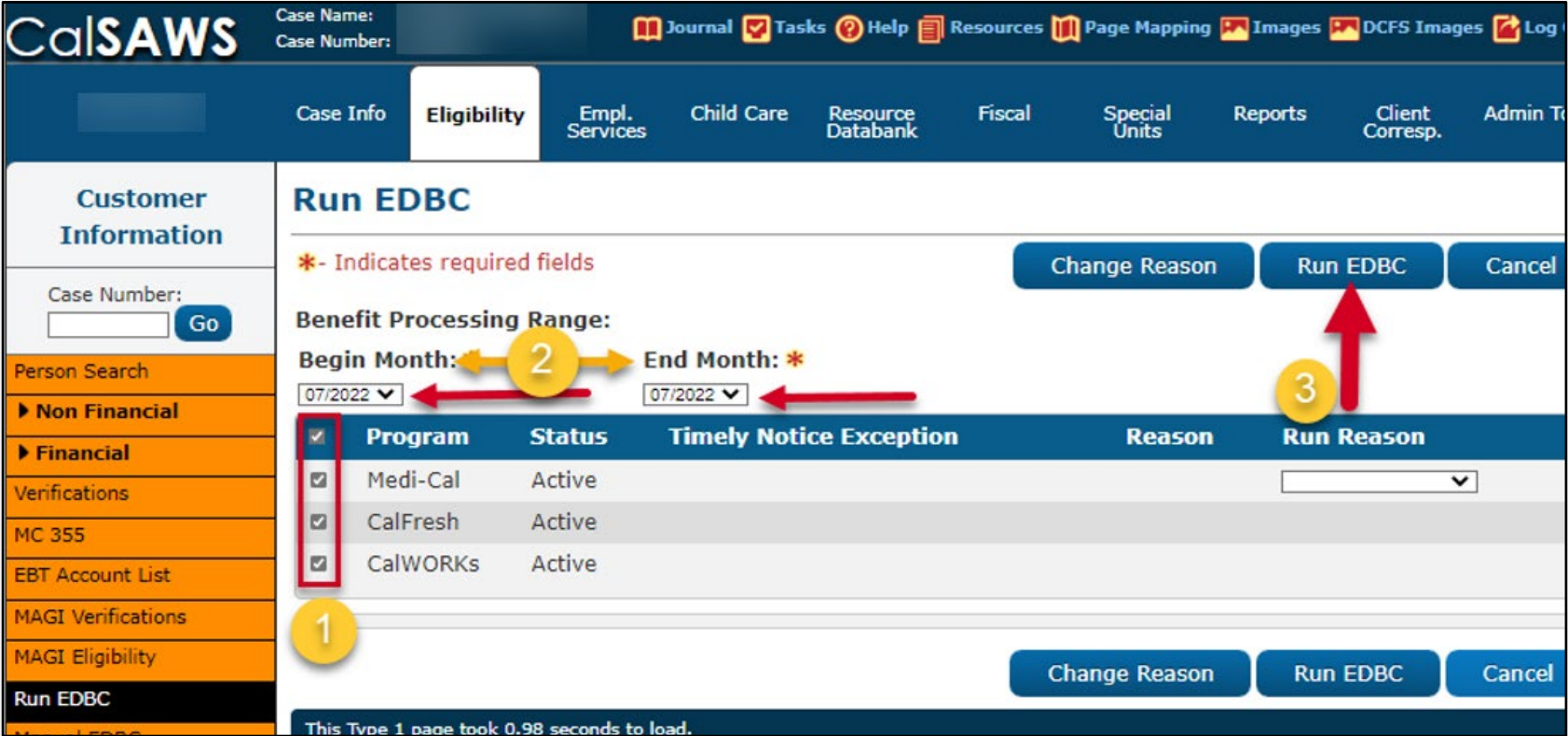
Case Name

Add

Display:

10/01/2022

View

| Steps To Clear Alert                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                       | Screenshot                                                                            |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|--|
| <div>10. Check the box for both Medi-Cal programs and select the appropriate Run Reason from the Run Reason dropdown menu, as necessary.</div> <div>11. Click the <b>Run EDBC</b> button to navigate to the <b>EDBC List</b> page.</div> <div>12. Click the program hyperlink with a Run Status of Not Accepted, review the results for accuracy, and click the <b>Accept</b> button to navigate back to the <b>EDBC List</b> page.</div> <div>13. Click the <b>Save and Return</b> button.</div> <div>On the duplicate case, take negative action per your county's business process.</div> <div>The following Job Aids are available to assist in CalSAWS located by clicking <b>Help</b> in the Utilities navigation bar:</div> <div><ul style="list-style-type: none"><li>JA Medi-Cal - Long Term Care (LTC)</li></ul></div> |                                                                                                                                                                                                                                                                                                                                       |                                                                                       |  |
| 10                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <div>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, and accept the new EDBC budget results.</div> <div>Users should review EDBC results to ensure accuracy before accepting results.</div> |  |  |

Steps To Clear Alert



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's procedure when Troubleshooting EDBC Results.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:  
 Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

CalFresh EDBC Summary

\*- Indicates required fields

Change ReasonAcceptCancel

| Begin Month | End Month | Run Date   | Run Status   | Accepted By |
|-------------|-----------|------------|--------------|-------------|
| 09/2022     |           | 07/29/2022 | Not Accepted |             |

EDBC Information

Semi-Annual Reporting Period Begin  
Month: 06/2022

Reporting Type Reason:  
Type: Regular

Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 09 - CalFresh

Program Status: Active

SUAS Eligible: Yes

Program Type: Regular

Note: Overridden rows are in bold.

| Name | DOB | Role | Role Reason | Status | Status Reason |
|------|-----|------|-------------|--------|---------------|
|      |     | MEM  |             | Active |               |
|      |     | MEM  |             | Active |               |
|      |     | MEM  |             | Active |               |

Override Program Configuration

Reporting Configuration

Work Registration

| Name | Status | Status Reason                              |
|------|--------|--------------------------------------------|
|      | Exempt | Weekly Earnings = Fed Minimum Wage x 30hrs |
|      | Exempt | Child under 16                             |
|      | Exempt | Child under 16                             |

Steps To Clear Alert

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

**JA EDBC – Troubleshooting Incorrect Results**

**JA EDBC - Online Definitions and Troubleshooting**

Screenshot

| Case Info                  | Eligibility | Empl. Services | Child Care | Resource Databank | Fiscal | Special Units | Reports | Client Corresp. | Admin Tools           |
|----------------------------|-------------|----------------|------------|-------------------|--------|---------------|---------|-----------------|-----------------------|
| Total Adjusted Income      |             |                |            |                   |        |               |         | =               | 1,176.01              |
| Excess Shelter Costs       |             |                |            |                   |        |               |         | \$              | <a href="#">49.00</a> |
| Maximum Shelter Allowance  |             |                |            |                   |        |               |         | \$              | 597.00                |
| Allowed Shelter Costs      |             |                |            |                   |        |               |         | \$              | 49.00                 |
| Total Net Nonexempt Income |             |                |            |                   |        |               |         | =               | 1,127.00              |
| Household Size             |             |                |            |                   |        |               |         |                 | <a href="#">3</a>     |
| Maximum Net Income         |             |                |            |                   |        |               |         | \$              | 1,830.00              |
| Result                     |             |                |            |                   |        |               |         |                 | Pass                  |

Allotment

Regular

|                                      |    |                      |
|--------------------------------------|----|----------------------|
| Full Month Allotment                 | \$ | 319.00               |
| Dates to Prorate                     |    | 1-30                 |
| Allotment                            | \$ | 319.00               |
| Combined Allotment                   | \$ | 319.00               |
| CFAP Amount                          | \$ | 0.00                 |
| Overridden CFAP Amount               | \$ |                      |
| Final Allotment                      | \$ | 319.00               |
| Overridden Allotment                 | \$ |                      |
| <div>Override Allotment</div>        |    |                      |
| Previous Potential Benefit Allotment | -  | <a href="#">0.00</a> |
| Overissuance Adjustment Amount       | -  | <a href="#">0.00</a> |
| Authorized Amount                    | =  | 319.00               |

Work Incentive Nutritional Supplement

|             |    |                      |
|-------------|----|----------------------|
| WINS Amount | \$ | <a href="#">0.00</a> |
|-------------|----|----------------------|

Delivery Method: \*

Immediacy Indicator: \*

Issuance Method:

Mail

Routine

EBT

Change Reason

Accept

Cancel



| Steps To Clear Alert |  | Screenshot |
|----------------------|--|------------|
|                      |  |            |

Steps To Clear Alert

- 9
- On the **EDBC List** page, click on the Program hyperlink to review each EDBC run. Once all the EDBC's have been accepted the User will be able to Save and Continue.

Screenshot

CalSAWS

Case Name:  
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number:  
  
Go

Person Search

► Non Financial

► Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

► ABAWD

EDBC Results

EDBC List

Preview NOAsSave and ContinueCancel

• CalFresh NOA run is complete – NOA generated

Display by:  
Program:Type Reason:Run Status:From:To:View

Search Results SummaryResults 1 - 5 of 5

| Begin Month | End Month | Program                  | Type    | Run Status           | Auth Amount | Date Run   | EDBC Source       |
|-------------|-----------|--------------------------|---------|----------------------|-------------|------------|-------------------|
| 07/2019     |           | <a href="#">CalWORKs</a> | Regular | Accepted - Saved     | Fail        | 06/12/2019 | Conversion        |
| 02/2022     |           | <a href="#">CalFresh</a> | Regular | Accepted - Saved     | 319.00      | 12/27/2021 | Conversion        |
| 05/2022     |           | <a href="#">Medi-Cal</a> | Regular | Accepted - Saved     | Details     | 04/14/2022 | Batch EDBC Rules  |
| 09/2022     |           | <a href="#">CalFresh</a> | Regular | Accepted - Not Saved | 319.00      | 07/29/2022 | Online EDBC Rules |
| 09/2022     |           | <a href="#">Medi-Cal</a> | Regular | Accepted - Not Saved | Details     | 07/29/2022 | Online EDBC Rules |

Preview NOAsSave and ContinueCancel

This Type 1 page took 0.46 seconds to load.

## Steps To Clear Alert

10 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.

## Screenshot

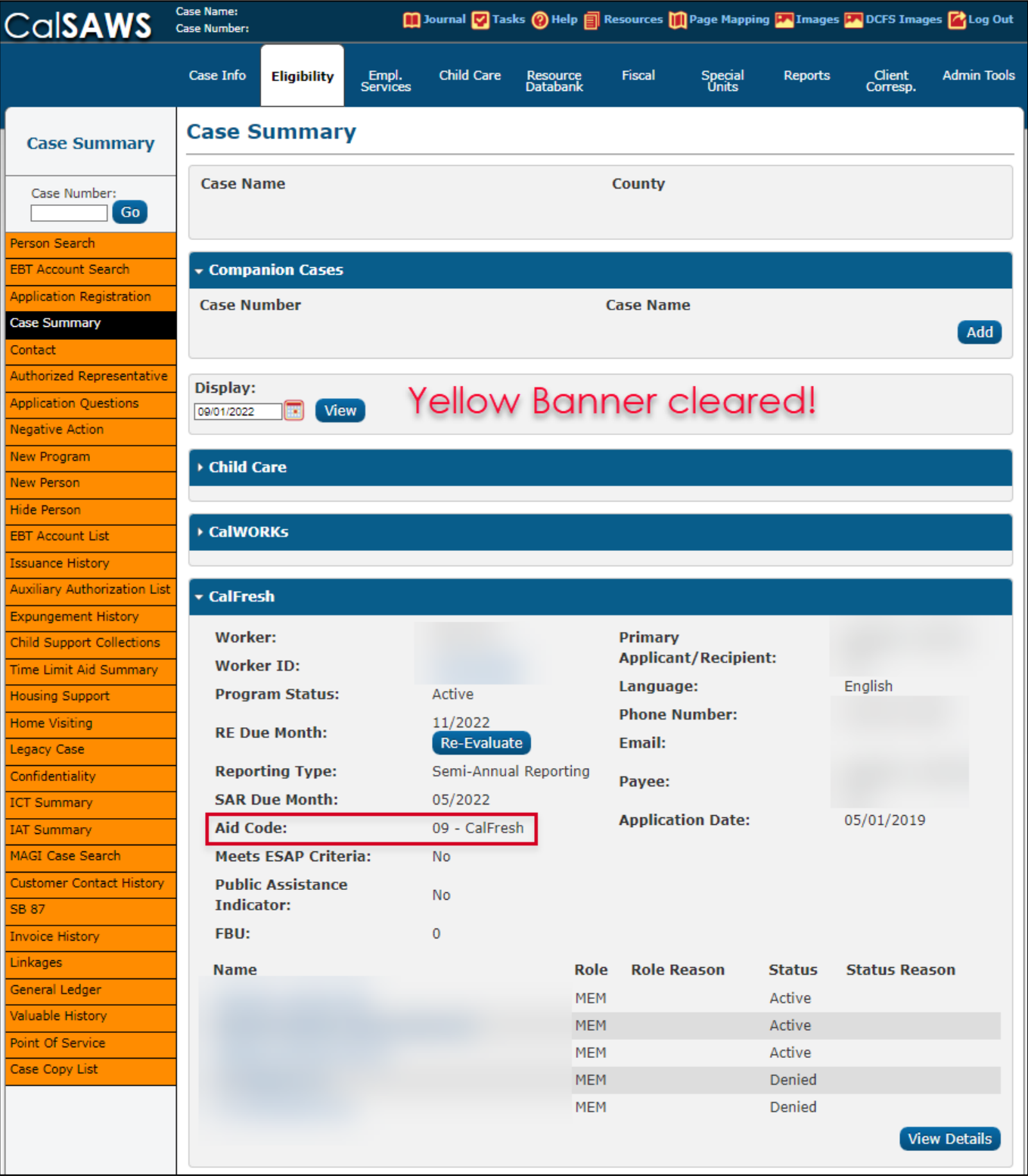
The screenshot displays the CalSAWS interface. At the top, there is a header with the CalSAWS logo and navigation links: Case Name, Case Number, Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a secondary navigation bar with tabs: Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools.

The main content area is titled "Distributed Documents Search". It includes a "Customer Information" sidebar on the left with a "Case Number:" field and a "Go" button. Below this are several orange buttons: "Person Search", "Non Financial", "Financial", "Verifications", "MC 355", "EBT Account List", "MAGI Verifications", "MAGI Eligibility", "Run EDBC", and "Manual EDBC".

The main search area contains a "Refine Your Search" link and a "Back to EDBC List page" button. Below this is a "Search Results Summary" section showing "Results 1 - 1 of 1". The results are displayed in a table with columns: Date, Document Name, Number, Program, Status, and Viewed Via Self-Service Portal. The first result is dated 07/29/2022 10:00 AM, with the document name "NOA - CF - NC - WINS:Work hr is < minimum reqd". A red arrow points to the document name. The program is "CalFresh" and the status is "Preview". A "Details" button is located to the right of the result.

| Date                | Document Name                                  | Number | Program  | Status  | Viewed Via Self-Service Portal |
|---------------------|------------------------------------------------|--------|----------|---------|--------------------------------|
| 07/29/2022 10:00 AM | NOA - CF - NC - WINS:Work hr is < minimum reqd |        | CalFresh | Preview | <a href="#">Details</a>        |

| Steps To Clear Alert |                                                                                                                                                                                                                                                                           | Screenshot                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11                   | <p>Once the Notice of Actions are reviewed, accepted, and saved, journal the action taken according to County business processes. If the NOA is not reviewed, it will go out due to an overnight batch process.</p> <p>Navigate back to the <b>Case Summary</b> page.</p> | <div><div>NOA</div><div><div>Reject</div><div>Cancel</div><div>Preview Only Do not Distribute</div></div><div><div>STATE OF CALIFORNIA<br/>HEALTH AND WELFARE AGENCY<br/>CALIFORNIA DEPARTMENT OF SOCIAL SERVICES</div><div>NOTICE DATE: July 29, 2022<br/>CASE NAME:<br/>CASE NUMBER:<br/>WORKER NAME:<br/>WORKER ID:<br/>TELEPHONE NUMBER:<br/>CUSTOMER ID:</div><div>CALFRESH<br/>NOTICE OF TERMINATION<br/>WORK INCENTIVE NUTRITIONAL<br/>SUPPLEMENT (WINS) BENEFITS</div><div>As of 08/31/2022, your WINS benefits is being stopped.<br/>Here's why:<br/>Your work hours have fallen below the minimum required for WINS eligibility.<br/><b>EBT:</b> Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away.<br/><b>Medi-Cal:</b> This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s).</div><div>Questions? Ask your worker.<br/><b>State Hearing:</b> If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.</div><div>DO NOT<br/>DISTRIBUTE</div><div>Rules: These rules apply; you may review them at your local welfare office: ACL 13-71, ACIN I-14-14, Welfare &amp; Institutions Code 15525.</div><div>WINS 1239-TPage 1 of 1</div></div></div> |

| Steps To Clear Alert |                                                                                                                                                                           | Screenshot                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 12                   | <p>Journal the action taken according to County business processes.</p> <p>The Yellow Banner should no longer appear on the case.</p> <p>The case review is complete!</p> |  <p>The screenshot shows the CalSAWS Case Summary page. The 'Case Summary' tab is selected in the top navigation bar. The 'Case Number' field is empty, and the 'Go' button is visible. The 'Person Search' menu is open, showing various search options. The 'Case Summary' section displays the 'Case Name' and 'County'. The 'Companion Cases' section shows a table with 'Case Number' and 'Case Name' columns. The 'Display' section shows the date '09/01/2022' and a 'View' button. The 'Child Care' and 'CalWORKs' sections are visible. The 'CalFresh' section shows the 'Worker' information, including 'Worker ID', 'Program Status', 'RE Due Month', 'Reporting Type', 'SAR Due Month', 'Aid Code', 'Meets ESAP Criteria', 'Public Assistance Indicator', and 'FBU'. The 'Aid Code' is highlighted with a red box and labeled '09 - CalFresh'. The 'Primary Applicant/Recipient' section shows 'Language' as 'English' and 'Phone Number' as 'English'. The 'Payee' section shows 'Application Date' as '05/01/2019'. The 'Status' section shows a table with columns 'Name', 'Role', 'Role Reason', 'Status', and 'Status Reason'. The table contains five rows of data, with the first three rows showing 'Active' status and the last two rows showing 'Denied' status. A 'View Details' button is located at the bottom right of the 'Status' section.</p> |