

Program Discontinued

Priority Level: 1

Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care, GA/GR, Medi-Cal, RCA

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 was run in CalSAWS, active Programs in the CalWIN system are now reflecting a Program Discontinuance in CalSAWS. Discontinuance reasons include but are not limited to: Failure to Provide (FTP) Verifications, Over Income, Over Resources, CF Recert Expired, No Eligible Member, etc... Users will need to run EDBC in CalSAWS to find the actual discontinuance reason. Based on the reason for discontinuance, the User may need to update the appropriate data collection pages (Individual Demographics, Citizenship, Household Status, Relationship, Income, Customer Reporting, Verifications, etc.) and rerun EDBC.

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	MESSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalWORKs	Program Discontinued	06/30/2022	Over Income	1		

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.

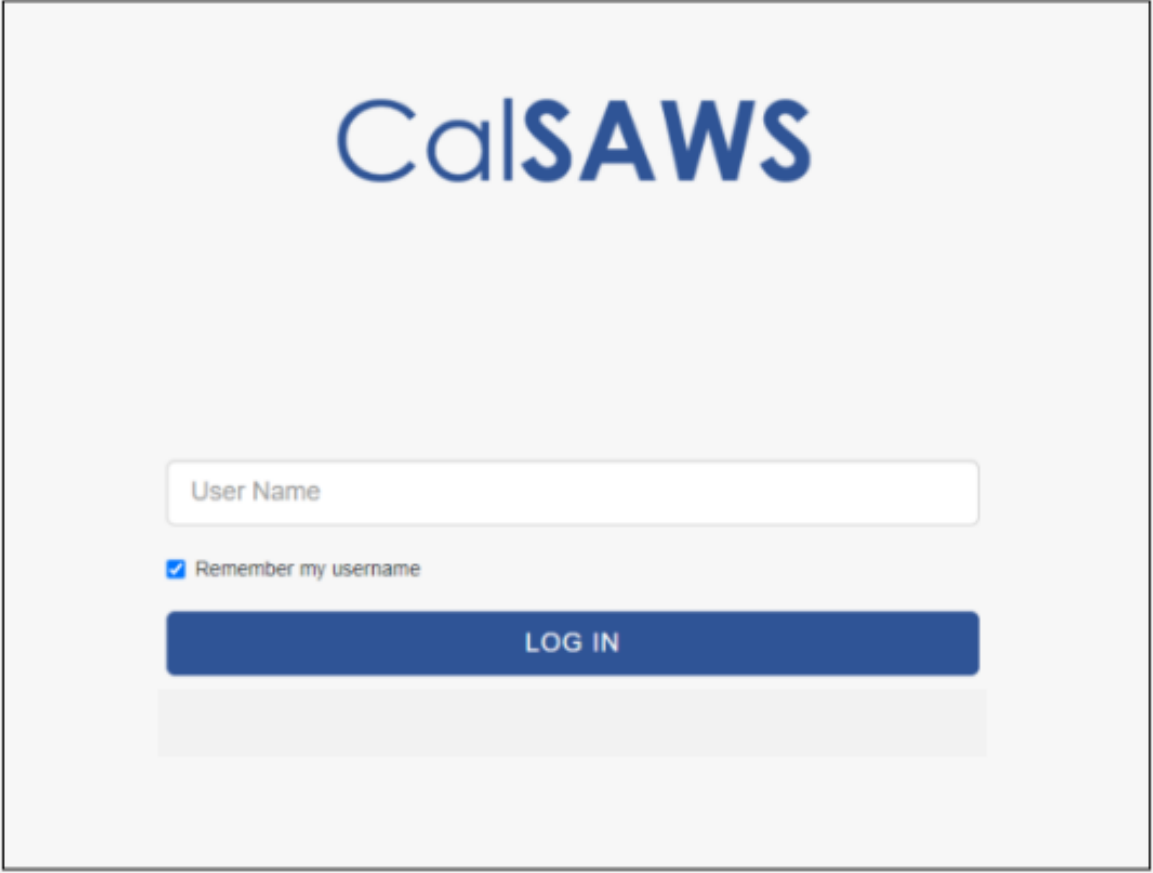
In the steps to clear the Yellow Banner detailed below, we will review a variety of examples showing failed EDBC results for Program Discontinued EDBC mismatch reasons.

Program Status Reason EDBC Mismatch Reasons			
No Eligible Member: Ineligible Non-Citizen	CalFresh Recertification Expired	Unrelated Primary Applicant	No Eligible Child - No Deprivation

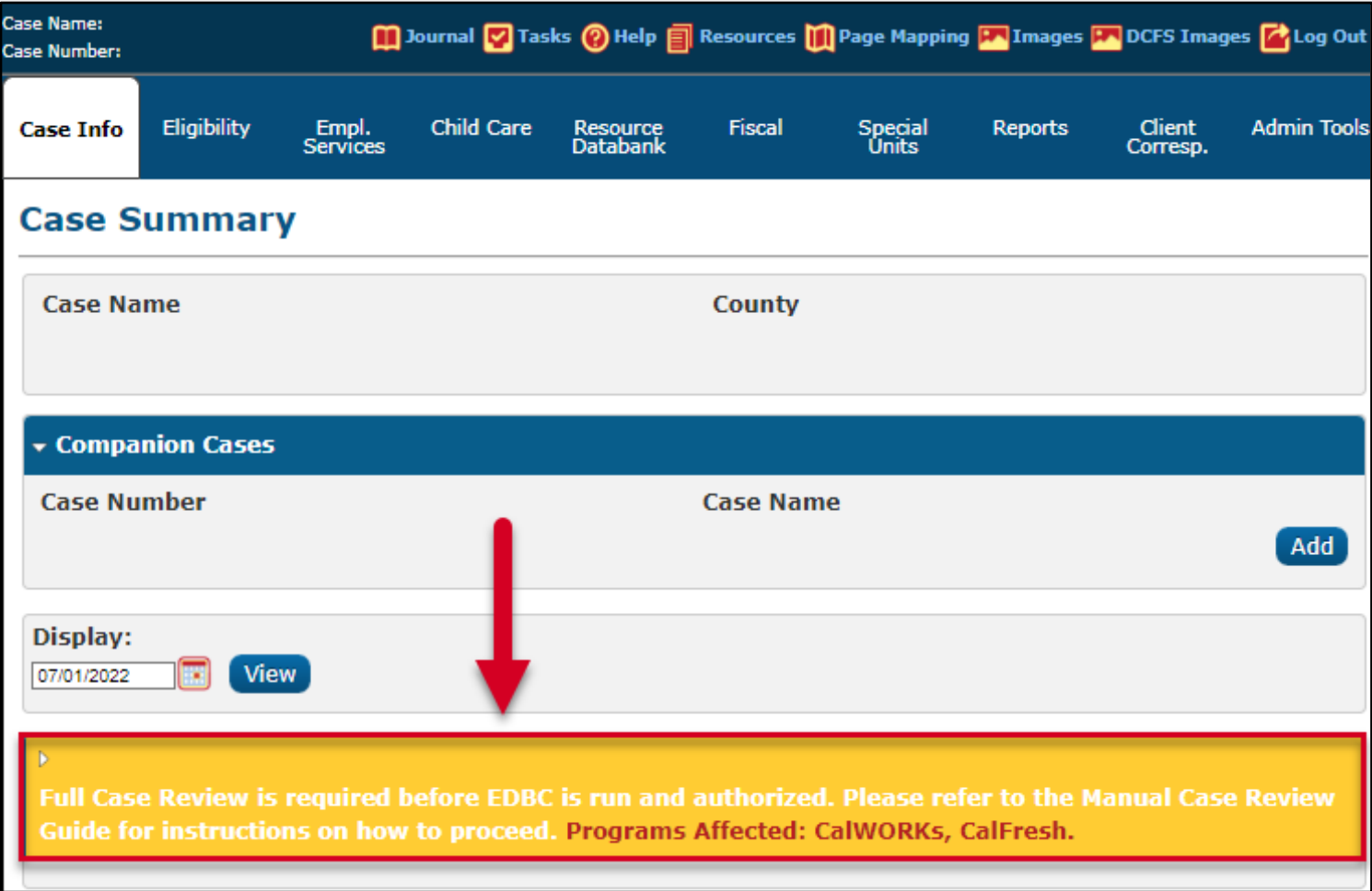
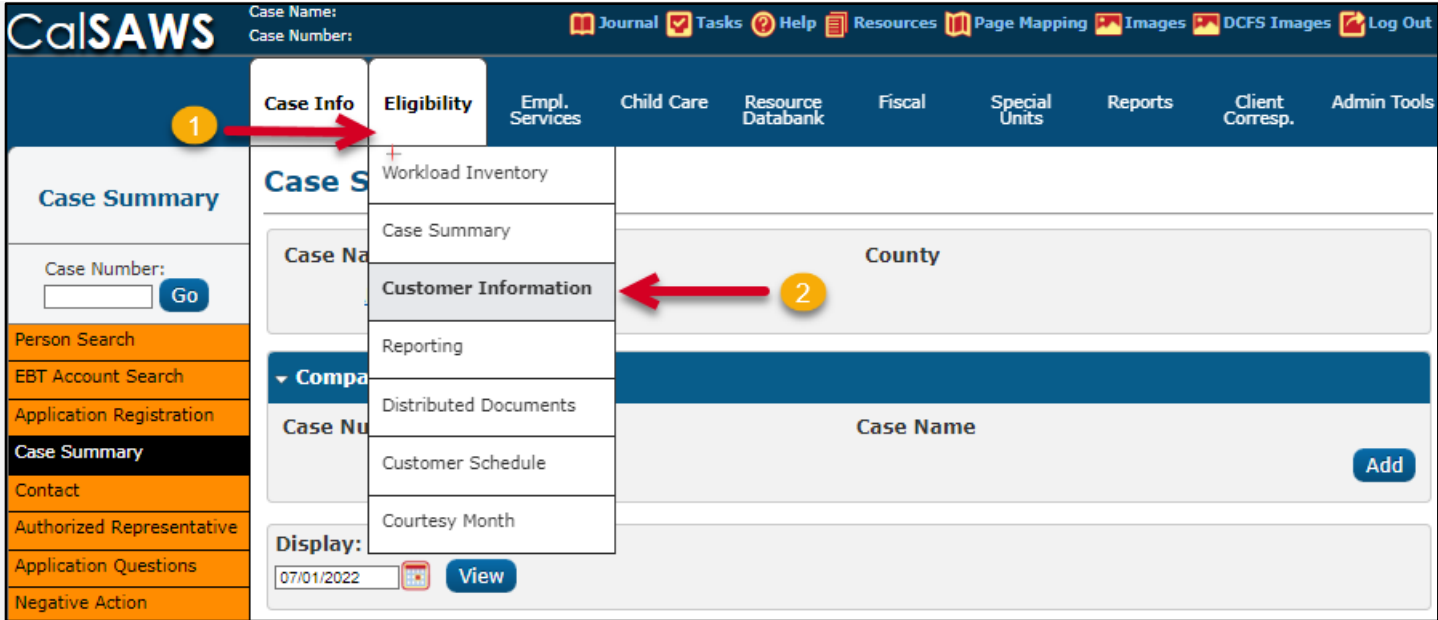
Country of Citizenship Not Populated and/or Section Code Update	No Eligible Member – Failed MAGI	Over Resources	No Eligible Child – Mandatory/Optional Rules
HH Members Discontinued for “Gets SSI” Role Reason	Failure To Provide County Residence	Over Income	Update Good Cause Option for Immunization
Failure To Provide Verification	Failure To Provide Name/Identity	No Absent/Unmarried Parent Record	No Appl – Req Person

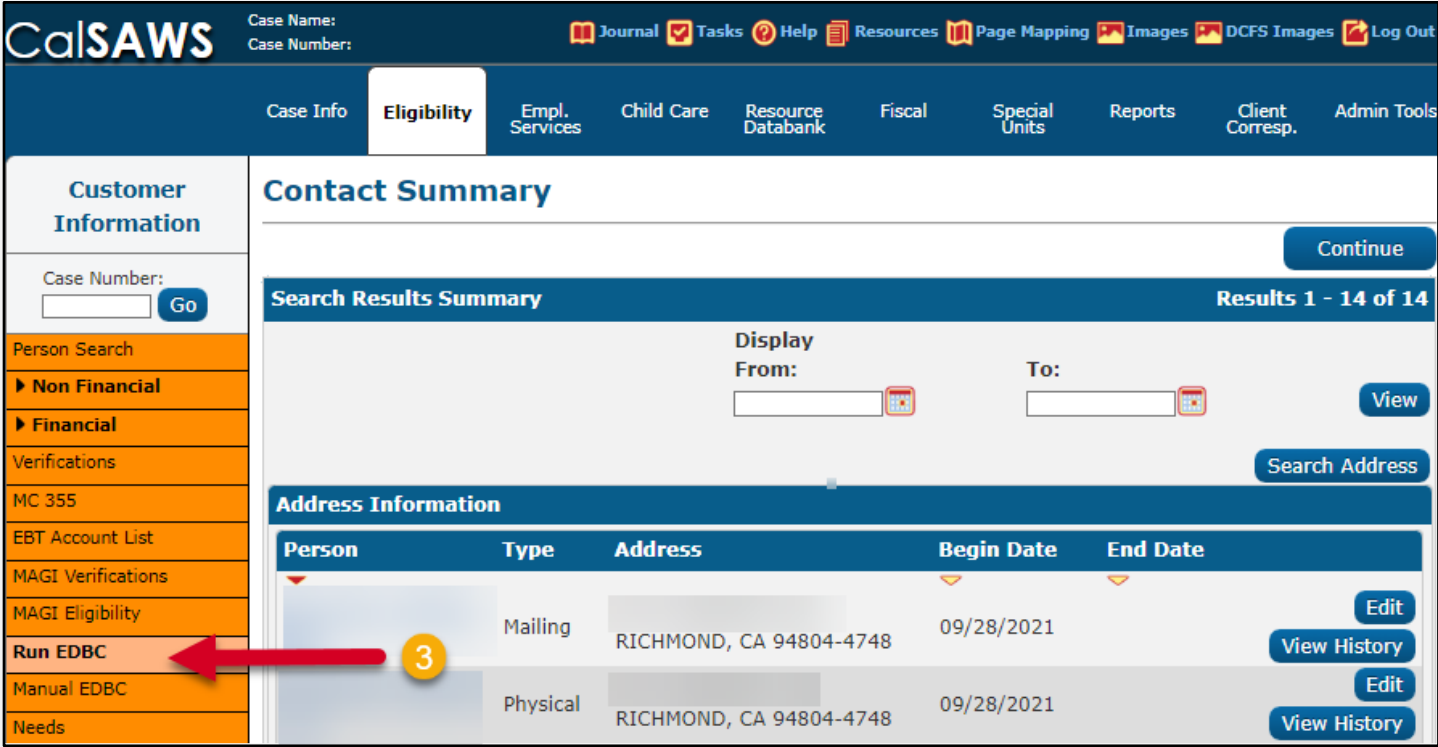
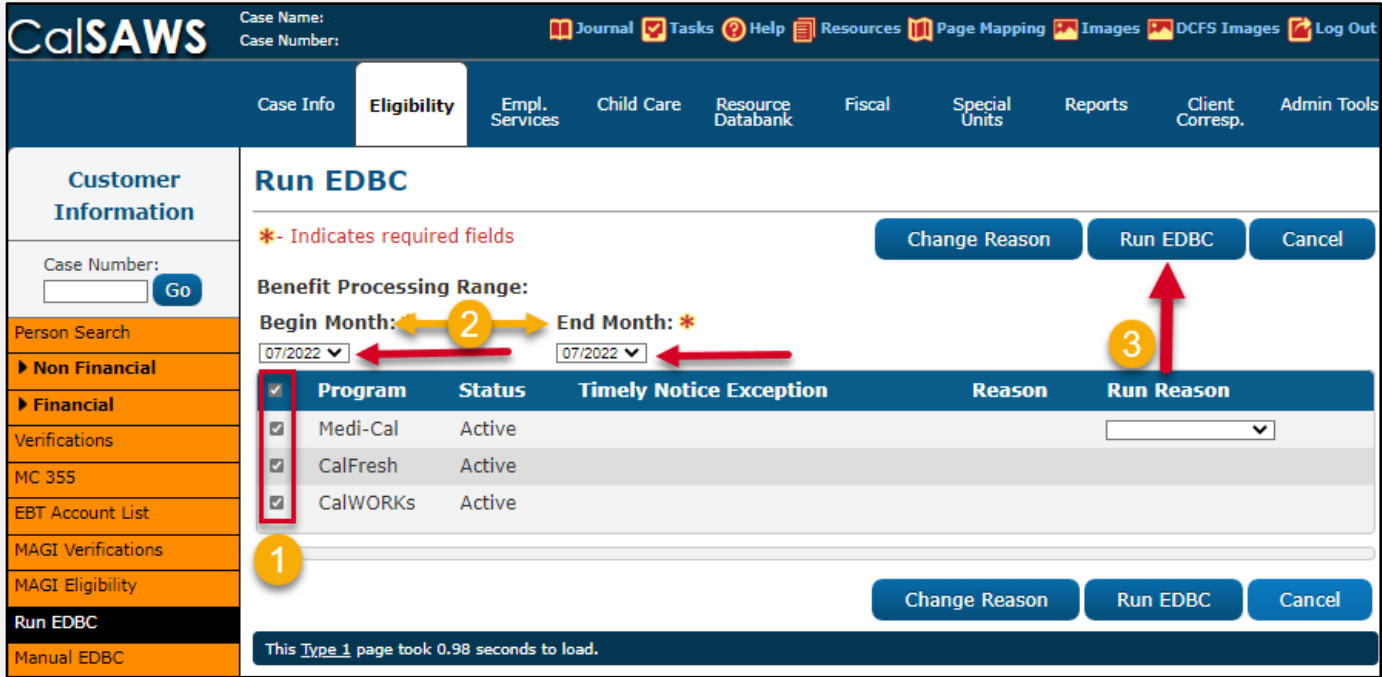
Examples

Program Discontinued

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

Steps to Clear Alert		Screenshot
2	On the Homepage: 1. Enter the case number and click on the Submit button to be navigated to the Case Summary page. ★ Note: This step is not necessary if already on the Case Summary page for the desired case ★ Note the Yellow Banner on the Case Summary Page	

Steps to Clear Alert		Screenshot
		
3	On the Case Summary Page: 1. Click on the Eligibility tab on the Global navigator. 2. Click on the Customer Information tab on the Local navigator.	

Steps to Clear Alert		Screenshot
	From the Contact Summary page: Click on Run EDBC tab on the Task navigator.	
4	On the Run EDBC page: - Select all applicable Programs. ★ Note: Program fields must be selected first or the Begin and End Months will show grayed out. - 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. - 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.	

Steps to Clear Alert

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.

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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 policy.

Screenshot

Steps to Clear Alert

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In the following examples, we will review a variety of failed EDBC results for **Program Discontinued** EDBC mismatch reason and identify the corresponding Data Collection pages to review for updates prior to re-running EDBC.

Note: If the discontinuance reason appears correct after case review, the User can accept and save the failed EDBC results.

Access the EDBC List page

1. Click on the **Program Link** to access the EDBC Summary Page and review the results.

The following Job Aids are available to assist in CalSAWS located in the **Help Icon** in the Utilities navigator:

EDBC - Online Definitions and Troubleshooting
EDBC - Troubleshooting Incorrect Results

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

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

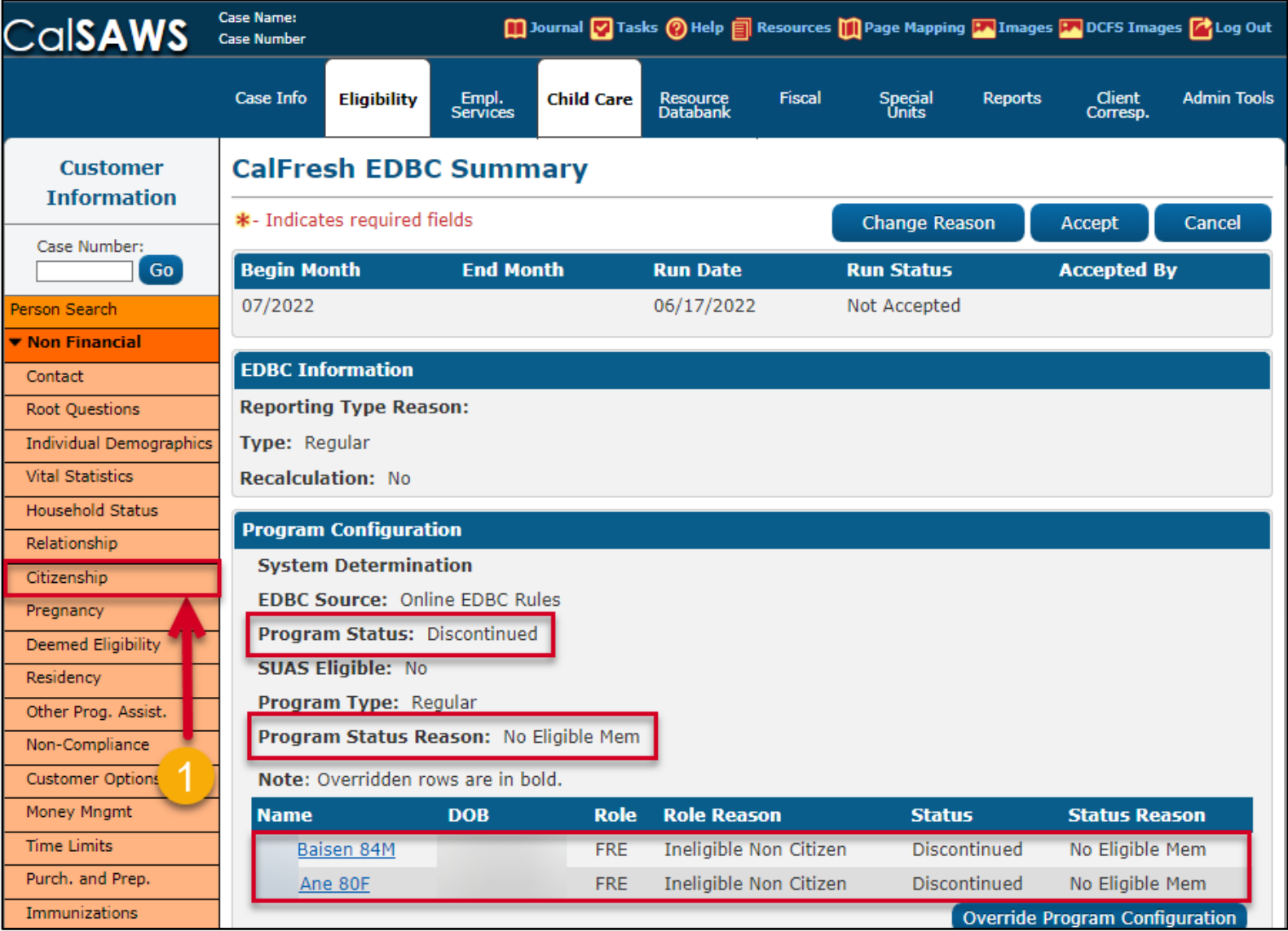
Service Arrangements

EDBC List

Display by: Program: Type Reason: Run Status: From: 06/2022 To: 07/2022 View

Search Results Summary Results 1 - 4 of 4

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
03/2022		CalFresh	Regular	Accepted - Saved	63.00	02/05/2022	Conversion
03/2022		Medi-Cal	Regular	Accepted - Saved	Details	02/05/2022	Conversion
07/2022		CalFresh	Regular	Not Accepted	Fail	06/17/2022	Online EDBC Rules
07/2022		Medi-Cal	Regular	Not Accepted	Fail	06/17/2022	Online EDBC Rules

Steps to Clear Alert		Screenshot
6	The User will need to review discontinuance details within the Program Configuration section of the EDBC Summary to identify and update the data collection pages that may impact the eligibility determination. In this first example, both HH Members are Discontinued for “Ineligible Non-Citizen” Role Reason. 1. Navigate to the Citizenship link to review the Citizenship Detail Page for information that may need to be updated. The following Job Aids are available to assist in CalSAWS: Citizenship and Sponsorship - Add or Edit Vital Statistics	

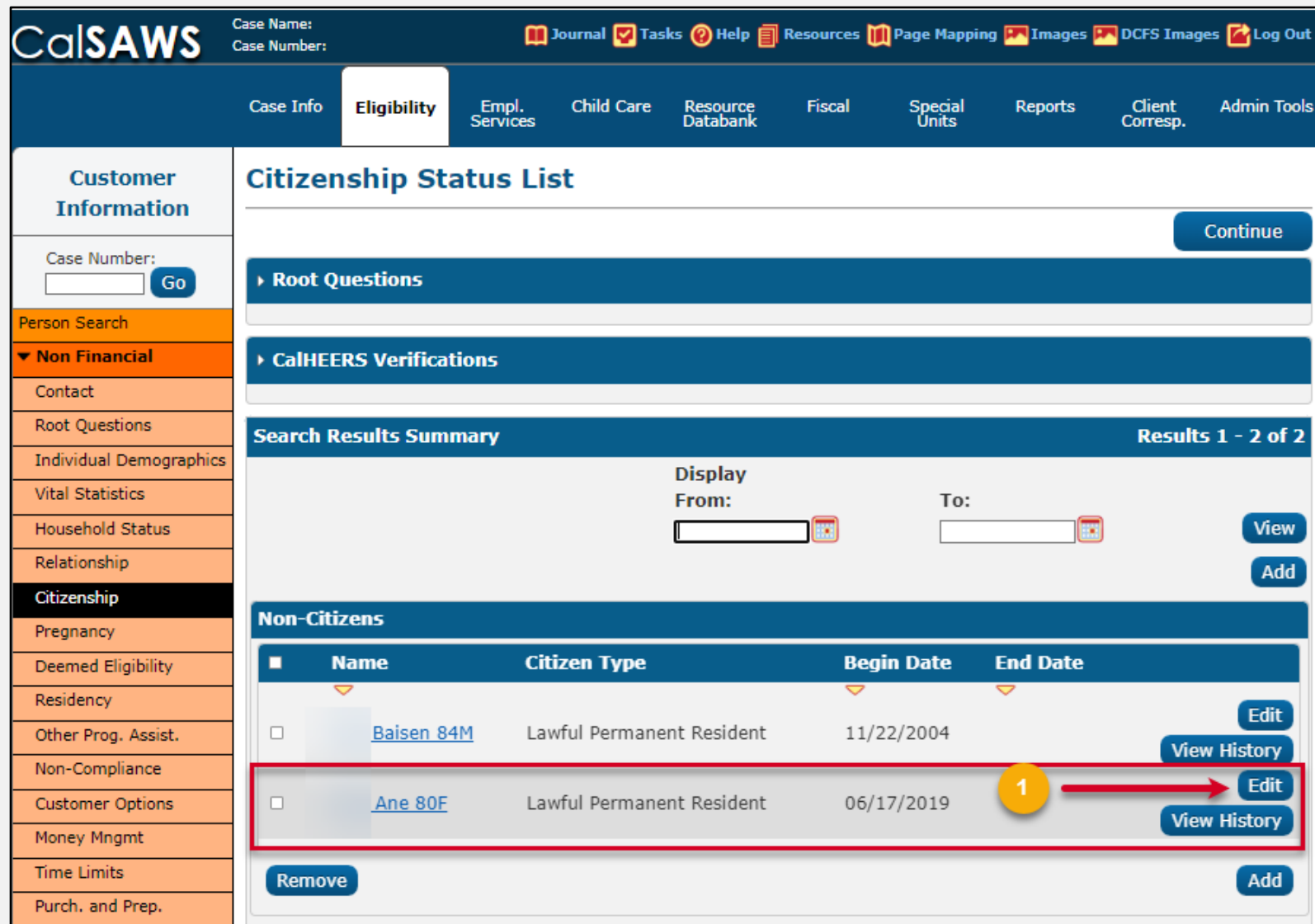
Steps to Clear Alert

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From the **Citizenship Status List** Page:

1. Select the **Edit** button next to the HH Member to review and edit the Individual's Citizenship Status Detail page.

Screenshot



The screenshot displays the CalSAWS interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main navigation bar lists various modules: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The left sidebar shows a 'Customer Information' menu with options like Person Search, Non Financial, Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship, Citizenship (highlighted), Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, Customer Options, Money Mngmt, Time Limits, and Purch. and Prep.

The main content area is titled 'Citizenship Status List' and includes a 'Continue' button. Below this are sections for 'Root Questions' and 'CalHEERS Verifications'. A 'Search Results Summary' section shows 'Results 1 - 2 of 2'. The 'Non-Citizens' table lists two individuals:

Name	Citizen Type	Begin Date	End Date	Actions
Baisen 84M	Lawful Permanent Resident	11/22/2004		Edit, View History
Ane 80F	Lawful Permanent Resident	06/17/2019		Edit, View History

A red box highlights the row for 'Ane 80F', and a yellow circle with the number '1' points to the 'Edit' button for this row. The 'Remove' and 'Add' buttons are at the bottom of the table.

8 In this example, the mandatory field **Country of Citizenship** and/or **Section Codes** were not populated and will need to be updated.

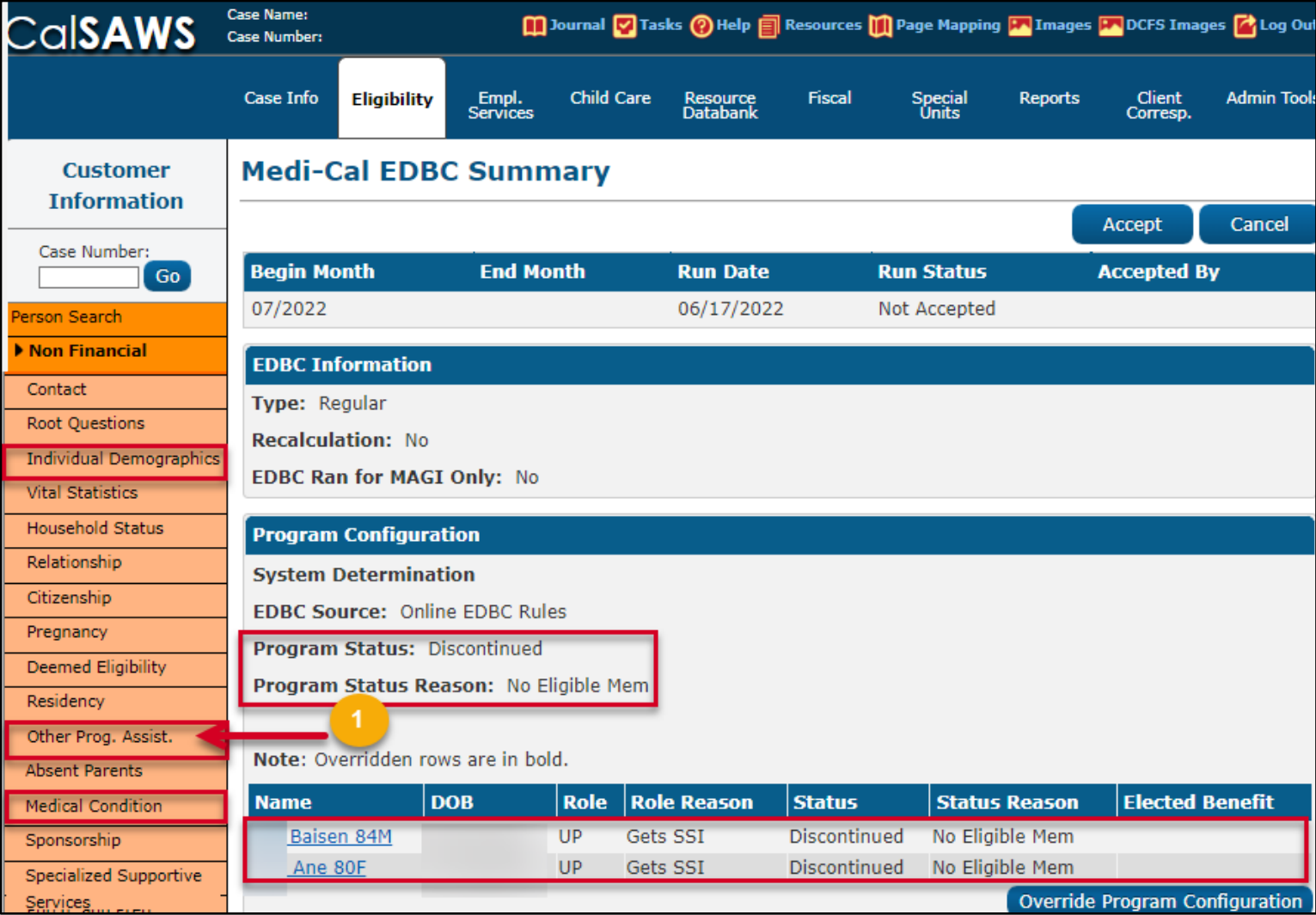
- 1. Enter **New Change Reason** and **New Reported Date**, as applicable.
- 2. Select the **Country of Citizenship** as reported and/or verified by the Individual.
- 3. Enter the correct **Document** Type if not already listed.
- 4. Select the correct **Section Code** if not already listed.
- 5. After reviewing and updating all other areas of the Citizenship Status Detail page, click **Save and Return**.

The following CalSAWS Reference Guide is available in the LMS:

CalSAWS Reference Guide – Change Reason

Additional data collection pages to review for completion:
Individual Demographics, Vital Statistics, Sponsorship, Verifications

The screenshot shows the 'Citizenship Status Detail' page in the CalSAWS system. The page has a top navigation bar with 'Case Info' and 'Eligibility' tabs. A left sidebar lists various data collection areas, with 'Citizenship' currently selected. The main form area contains several fields: 'New Change Reason' (dropdown), 'New Reported Date' (calendar icon), 'Name', 'Name upon US Entry', 'Citizenship Type', 'Document' (dropdown), 'Document Number' (text), 'Document First Name', 'Document Middle Name', 'Document Last Name', 'Document Date of Birth' (calendar icon), 'Visa Number', 'SEVIS ID', 'Country of Passport Issuance' (dropdown), 'Section Code' (dropdown), 'PRUCOL Reason' (dropdown), 'Country of Citizenship' (dropdown), 'Issue Date' (calendar icon), 'Adjustment Date' (calendar icon), 'A Number' (text), 'Expiration Date' (calendar icon), 'Five Year Bar Admin Verification' (dropdown), and 'Verified' (dropdown). Red annotations include: a double-headed arrow between 'New Change Reason' and 'New Reported Date'; a red arrow pointing to the 'Save and Return' button; a red arrow pointing to the 'Document Number' field; a red arrow pointing to the 'Section Code' dropdown; and a red arrow pointing to the 'Country of Citizenship' dropdown.

Steps to Clear Alert		Screenshot
9	Now on the Medi-Cal EDBC Summary Page, the User will need to review the Program Configuration section for the discontinuance details to identify the data collection pages that could potentially affect the program discontinuance. In this example, both HH Members are Discontinued for “Gets SSI” Role Reason. 1. Navigate to the Other Prog. Assist. (Other Program Assistance) link to review for information that may need to be updated. The following Job Aids are available to assist in CalSAWS: Other Program Assistance (OPA) Detail Page Additional Data Collection pages to review for completion: Individual Demographics, Medical Condition, Income.	 The screenshot displays the CalSAWS interface. On the left is a sidebar with a 'Customer Information' section containing a 'Case Number' field and a 'Go' button. Below this is a list of navigation links: 'Person Search', 'Non Financial', 'Contact', 'Root Questions', 'Individual Demographics', 'Vital Statistics', 'Household Status', 'Relationship', 'Citizenship', 'Pregnancy', 'Deemed Eligibility', 'Residency', 'Other Prog. Assist.', 'Absent Parents', 'Medical Condition', 'Sponsorship', 'Specialized Supportive Services', and 'Services'. The 'Other Prog. Assist.' link is highlighted with a red box and a yellow circle with the number 1. The main content area is titled 'Medi-Cal EDBC Summary' and includes 'Accept' and 'Cancel' buttons. Below this is a table with columns: 'Begin Month', 'End Month', 'Run Date', 'Run Status', and 'Accepted By'. The table contains one row with values: '07/2022', '06/17/2022', 'Not Accepted'. Below the table is the 'EDBC Information' section, which includes 'Type: Regular', 'Recalculation: No', and 'EDBC Ran for MAGI Only: No'. The 'Program Configuration' section follows, with 'System Determination' showing 'EDBC Source: Online EDBC Rules'. Below this, 'Program Status' is 'Discontinued' and 'Program Status Reason' is 'No Eligible Mem'. A note states: 'Note: Overridden rows are in bold.' At the bottom is a table with columns: 'Name', 'DOB', 'Role', 'Role Reason', 'Status', 'Status Reason', and 'Elected Benefit'. It contains two rows: 'Baisen 84M' and 'Ane 80F', both with a role of 'UP', a reason of 'Gets SSI', and a status of 'Discontinued'. The 'Status Reason' for both is 'No Eligible Mem'. A red box highlights the entire table, and a yellow circle with the number 1 is placed over the 'Other Prog. Assist.' link in the sidebar.

Steps to Clear Alert

10

In this example, the CalWORKs program is discontinued for: **FTP Verification**.

1. Navigate to the **Verifications** link to review the items outstanding on the Verification List Page.

The following Job Aids are available to assist in CalSAWS:

Verifications - Manage

Screenshot

CalSAWS

Case Name:
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog 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

GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

CalWORKs EDBC Summary

* - Indicates required fields

Change Reason

Accept

Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/17/2022	Not Accepted	

EDBC Information

Annual Reporting Period Begin Month: 02/2022

Reporting Type Reason: Child Only

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

Program Status: Discontinued

Program Status Reason: FTP Verification

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Famous 12F		MEM		Discontinued	FTP Verification
Calleon 11M		MEM		Discontinued	FTP Verification

Override Program Configuration

Steps to Clear Alert

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From the **Verification List** page, review the requested item hyperlink to view and edit the item requested, or:

1. Click **Verify** to confirm the item received and update the case record.

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Note: Pending items can also be “verified” by adjusting the item’s status within the appropriate Data Collection page. Clicking on any of the items’ hyperlinks will allow you to address each item individually.

Screenshot

CalSAWS

Case Name:
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog 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

GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Verification List

*- Indicates required fields

Status: *
Pending

From:

To:

Continue

View

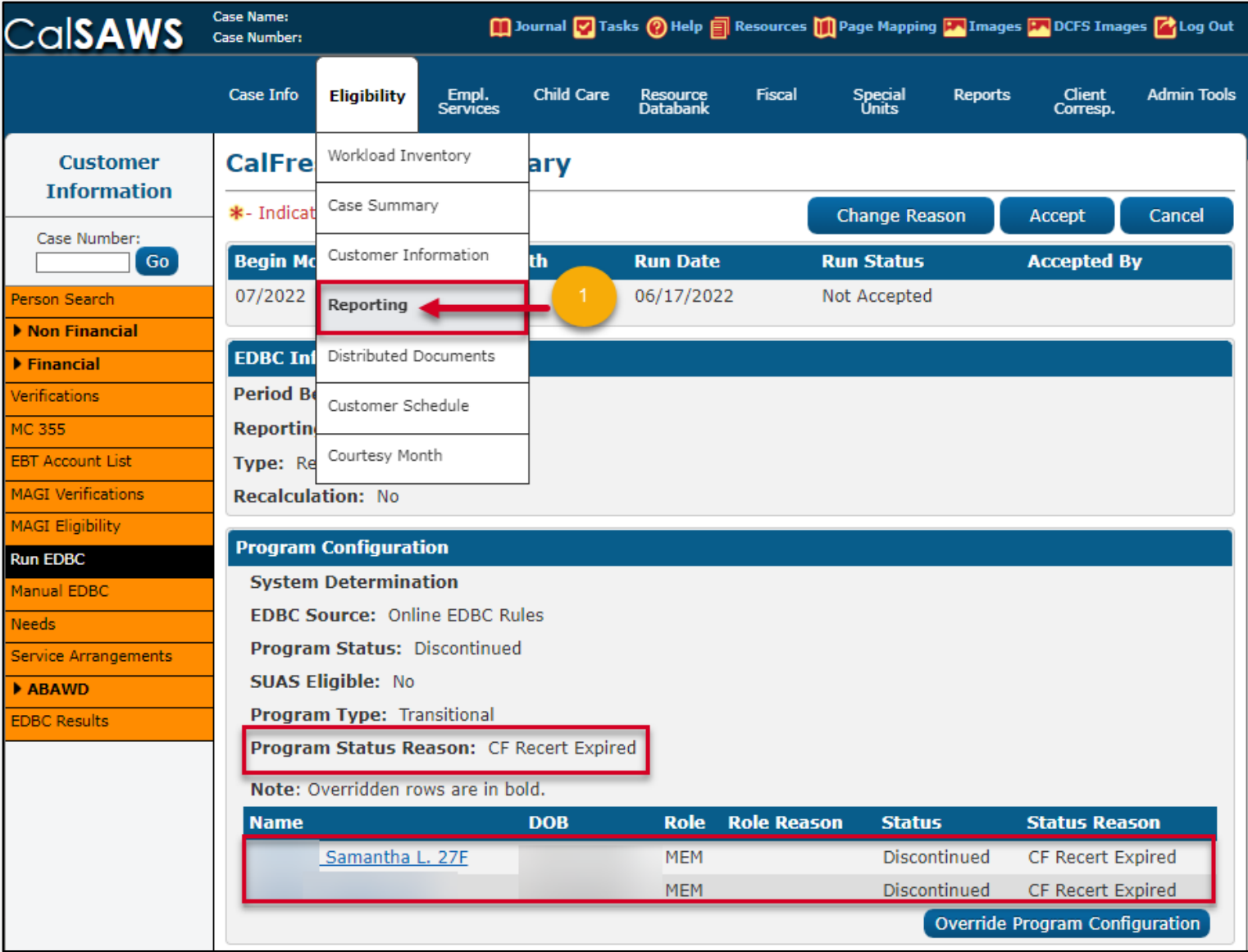
Search Results Summary

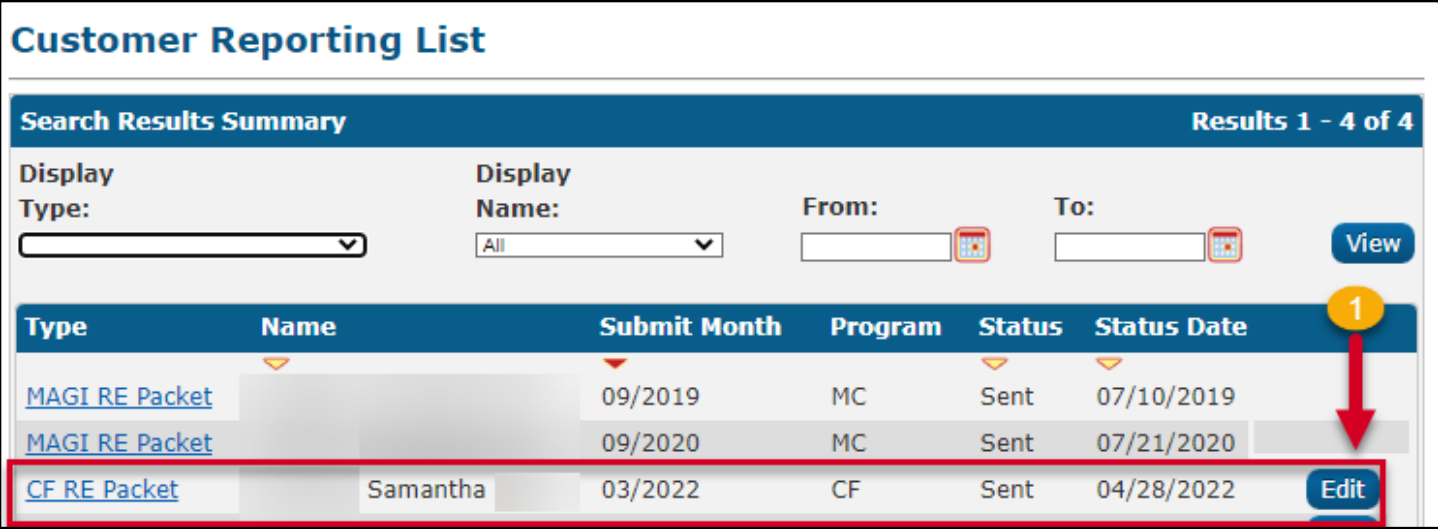
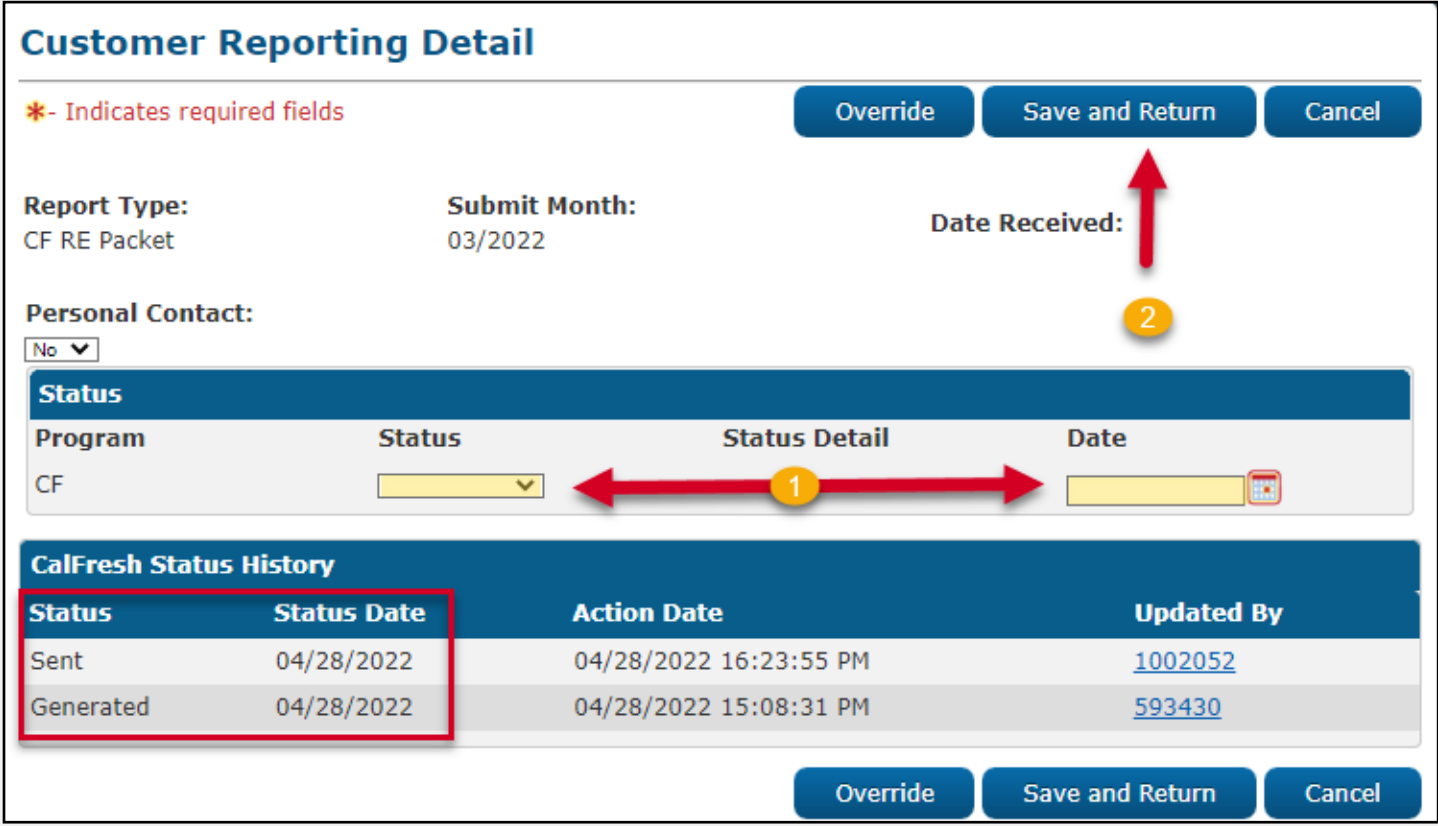
Results 1 - 17 of 17

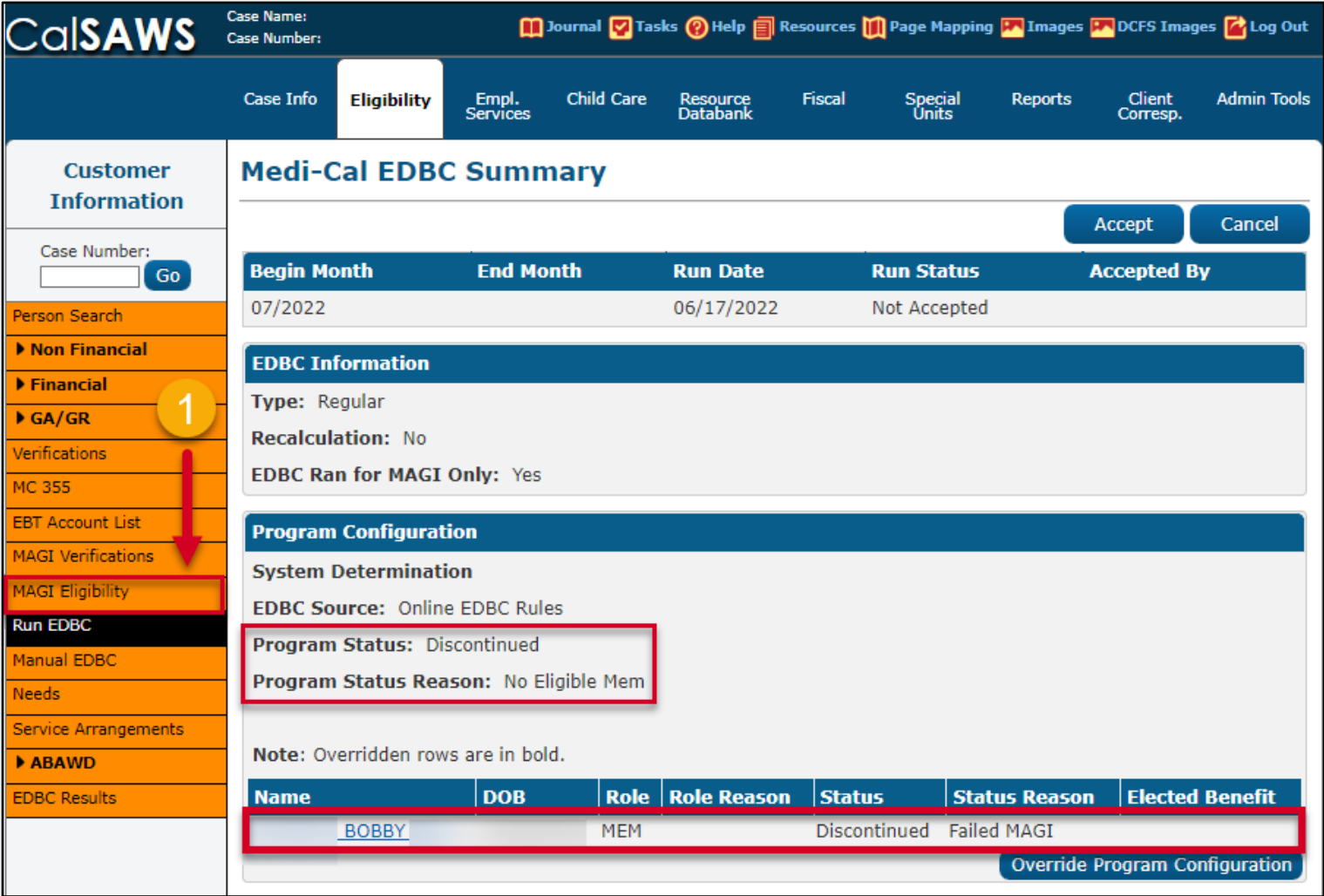
Add

Type	Name	Request Date	Due Date	Postponed ES	
☐	Income	05/01/06	05/11/06	Postpone	VerifyEditView History
☐	Income	05/01/06	05/11/06	Postpone	VerifyEditView History
☐	School End Date	08/23/07	09/02/07	Postpone	VerifyEditView History
☐	School End Date	08/23/07	09/02/07	Postpone	VerifyEditView History
☐	Other Program Assistance	10/01/11	10/01/11	Postpone	VerifyEditView History
☐	Name/Identity	11/03/16	11/13/16	Postpone	VerifyEditView History
☐	Country of Birth	02/26/21	03/03/21	Postpone	VerifyEditView History
☐	Vital Statistics	02/26/21	03/03/21	Postpone	VerifyEditView History
☐	US Citizenship	02/26/21	03/03/21	Postpone	VerifyEditView History
☐	School Attendance	02/26/21	03/08/21	Postpone	VerifyEditView History

Page 13

Steps to Clear Alert		Screenshot
12	In this example, the CalFresh program is discontinued for: CF Recert Expired 1. Navigate to the Eligibility tab and click on the Reporting link to review the outstanding Customer Report. The following Job Aids are available to assist with review and processing of Customer Reports in CalSAWS: CalWORKs CalFresh Re-Evaluation and Periodic Reporting Transitional CalFresh (TCF) Processing Barcoding Semi-Annual Report (SAR 7) - Process Medi-Cal Renewal Packets	 The screenshot displays the CalSAWS interface. At the top, there's a navigation bar with tabs: Case Info, Eligibility (selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The left sidebar shows a 'Customer Information' menu with options like Person Search, Non Financial, Financial, Verifications, MC 355, EBT Account List, MAGI Verifications, MAGI Eligibility, Run EDBC, Manual EDBC, Needs, Service Arrangements, ABAWD, and EDBC Results. The main content area shows the 'Eligibility' tab for a specific case. It includes a 'Begin Month' dropdown set to 07/2022 and a 'Reporting' link highlighted with a red box and an arrow. Below this is a table with columns: Run Date, Run Status, and Accepted By. The first row shows 06/17/2022, Not Accepted, and an empty cell. The 'Program Configuration' section shows 'System Determination' with 'EDBC Source: Online EDBC Rules', 'Program Status: Discontinued', 'SUAS Eligible: No', and 'Program Type: Transitional'. The 'Program Status Reason' is highlighted with a red box and shows 'CF Recert Expired'. A note states 'Note: Overridden rows are in bold.' Below this is a table with columns: Name, DOB, Role, Role Reason, Status, and Status Reason. The first row shows 'Samantha L. 27F', a blank DOB, 'MEM', a blank Role Reason, 'Discontinued', and 'CF Recert Expired'. The second row shows a blank Name, a blank DOB, 'MEM', a blank Role Reason, 'Discontinued', and 'CF Recert Expired'. An 'Override Program Configuration' button is at the bottom right.

Steps to Clear Alert		Screenshot
13	On the Customer Reporting List page, review the CF RE Packet in Sent status to access the Customer Reporting Detail Page. 1. Click Edit to access the CF RE Packet sent 04/28/2022	
14	On the Customer Reporting Detail page, review the CalFresh Status History 1. Update the Status field as appropriate and enter the applicable Date. 2. Click Save and Return to save changes to the CF RE Packet status	

Steps to Clear Alert		Screenshot
15	In this example, the Medi-Cal program is discontinued for: No Eligible Member – Failed MAGI 1. Navigate to the MAGI Eligibility link to begin review of MAGI results. The following CalSAWS Quick Guide is available in the LMS: CalSAWS Quick Guide – MAGI Determination Request The following Job Aids are available to assist with MAGI and Medi-Cal eligibility review in CalSAWS: Customer Options Detail - Add Medi-Cal - Tax Household Medi-Cal - MAGI Referrals and Eligibility Determinations Medi-Cal – MAGI Discontinuances Medi-Cal CalHEERS MAGI Eligibility Review	 The screenshot displays the CalSAWS interface. On the left, the 'Customer Information' sidebar lists various options, with 'MAGI Eligibility' highlighted by a red arrow and a yellow circle with the number 1. The main area shows the 'Medi-Cal EDBC Summary' page. At the top, there are buttons for 'Accept' and 'Cancel'. Below this is a table with columns: 'Begin Month', 'End Month', 'Run Date', 'Run Status', and 'Accepted By'. The first row shows '07/2022', '06/17/2022', and 'Not Accepted'. The 'EDBC Information' section shows 'Type: Regular', 'Recalculation: No', and 'EDBC Ran for MAGI Only: Yes'. The 'Program Configuration' section shows 'System Determination' with 'EDBC Source: Online EDBC Rules'. Below this, 'Program Status: Discontinued' and 'Program Status Reason: No Eligible Mem' are highlighted with a red box. A note states 'Note: Overridden rows are in bold.' At the bottom, a table with columns: 'Name', 'DOB', 'Role', 'Role Reason', 'Status', 'Status Reason', and 'Elected Benefit' is shown. The first row, for 'BOBBY', has 'MEM' as the role, 'Discontinued' as the status, and 'Failed MAGI' as the status reason. This row is also highlighted with a red box. An 'Override Program Configuration' button is at the bottom right.

Steps to Clear Alert

16

On the MAGI Determination List page, the **Begin Month**, **End Month** and **Program Identifier** must be selected before the User can **Request MAGI**.

1. A soft validation is presented when attempting to **Request MAGI** without the minimum requirements being met to make a MAGI determination.
2. Navigate to the **Tax Household** link to review and update Tax Household information as prompted.

Note: Users can review any previous MAGI **Determination** by clicking on the hyperlink to the applicable benefit month.

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](#)

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

► GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

► ABAWD

EDBC Results

MAGI Determination List

*- Indicates required fields

A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- Tax household information is missing for the following person(s):
 - BOBBY

Request MAGI Determination

Begin Month: *

07/2022 ▼

End Month: *

07/2022 ▼

Program Identifier: *

Medi-Cal ▼

Life Change Event:

▼

☐ Bypass Primary Contact Matching Criteria

☐ Request Lift Options

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

Request MAGI

Display MAGI Determinations

Begin Date:

End Date:

View

Search Results Summary

Results 1 - 1 of 1

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
07/2016	Determination	Complete	06/05/2016 8:38 AM	CalHEERS	Not Eligible

Steps to Clear Alert		Screenshot
17	On the Tax Household Detail Page, review and update the following mandatory fields: 1. Select the Primary Tax Filer from the dropdown box. 2. Indicate whether the Individual is required to file taxes for the current year. 3. Indicate whether the Individual is planning to file taxes for the current year. 4. Click Save to add the record. User can now navigate back to the MAGI Eligibility page or run full Medi-Cal hierarchy, as applicable, to assess for appropriate Medi-Cal eligibility and accept and save the results.	The screenshot shows the CalSAWS interface for the 'Tax Household Detail' page. The left sidebar contains a navigation menu with categories like 'Customer Information', 'Non Financial', 'Financial', 'Tax Household', 'GA/GR', and 'Verifications'. The 'Tax Household' section is expanded, showing options like 'Property', 'Special Needs', 'Expenses', 'Medicare', 'Third Party Liability', 'Other Health Care', 'Health Care Ref.', 'IEVS', 'Hunt v. Kizer', 'GA/GR', 'Verifications', 'MC 355', 'EBT Account List', and 'MAGI Verifications'. The main content area is titled 'Tax Household Detail' and includes a 'Save' and 'Cancel' button at the top right. Below this, there are several fields and questions, some marked with an asterisk (*) to indicate they are required. Callout 1 points to the 'Primary Tax Filer' dropdown menu. Callout 2 points to the 'Is this person expected to be required to file taxes for the current year?' dropdown menu. Callout 3 points to the 'Is this person planning to file taxes for the current year?' dropdown menu. Callout 4 points to the 'Save' button at the bottom right. The page also includes a 'Projected Annual Income' section with a text input for the amount and a dropdown for 'Is the Projected Annual Income amount correct?'.

Steps to Clear Alert

18 In this example, the CalWORKs program is discontinued for: **FTP County Residence**

1. Navigate to the **Residency** Page to update and verify Residency information prior to re-running EDBC.

Additional Data Collection pages to review for completion:
Contact, Living Arrangement, Household Status, etc.

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](#)

Customer Information

Case Number:

Go

Person Search

Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Employment

Striker

Unempl. Depriv.

Work Regist.

Living Arrgmt

Homeless Assistance

CalWORKs EDBC Summary

* - Indicates required fields

Change Reason

Accept

Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/17/2022	Not Accepted	

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:

Program Status: Discontinued

Program Status Reason: FTP County Residence

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Amethyst N. 3F		MEM		Discontinued	FTP County Residence
David A. 33M		MEM		Discontinued	FTP County Residence
Izziak A. 7M		MEM		Discontinued	FTP County Residence

Override Program Configuration

Reporting Configuration

Work Eligibility

Steps to Clear Alert

Screenshot

19 In this example, the CalWORKs program is discontinued for: **FTP Name/Identity**

1. Navigate to the **Individual Demographics** Page to update and verify and Individual information prior to re-running EDBC.

Additional Data Collection pages to review for completion:
Vital Statistics, Citizenship, Verifications, etc.

CalSAWS

Case Name:
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog 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

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Employment

Striker

Unempl. Benefit

CalWORKs EDBC Summary

* - Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/17/2022	Not Accepted	

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:

Program Status: Discontinued

Program Status Reason: FTP Name/Identity

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Omar 10M		MEM		Discontinued	FTP Name/Identity
Sandra 47F		FRE	CW Time Limit	Discontinued	FTP Name/Identity
Luis E. 50M		MEM		Discontinued	FTP Name/Identity
Joanna O. 15F		MEM		Discontinued	FTP Name/Identity

Override Program Configuration

Steps to Clear Alert

20

1. Click **Verify** to confirm receipt of any item that has been verified by the Participant. This will confirm the previous entry made by the user on the corresponding data collection page. In this example, the Individual Demographics page would be updated for Name/Identity, and the Vital Statistics page for Vital Statistics Identify if the user select either or both options.

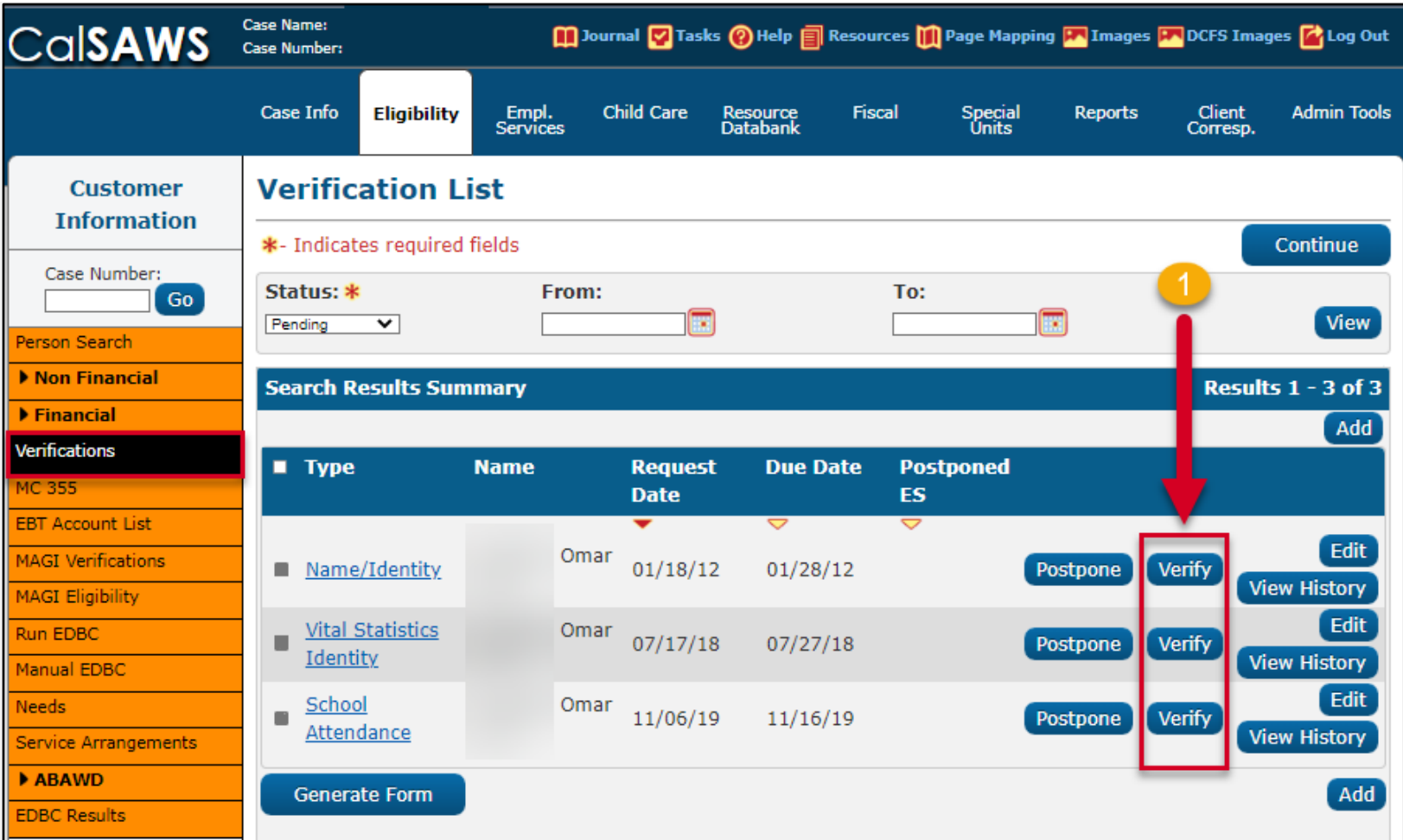
The Verification list page will list and display any verifications that are in a pending status on the data collection pages.

On this page, Users can verify verifications and send out a CW 2200 form, if needed.

Follow your county policy when adding verifications to the **Verification List** page.

For information on how to add, edit and view the details of verification requests, see Job Aid: **JA Verifications – Manage**

Screenshot



The screenshot shows the CalSAWS interface. On the left is a sidebar with a 'Verifications' menu item highlighted. The main content area is titled 'Verification List' and includes search filters for Status (set to 'Pending'), From, and To. Below the filters is a 'Search Results Summary' table with 3 results. The table has columns for Type, Name, Request Date, Due Date, and Postponed ES. Each row has a 'Verify' button. A red box highlights the 'Verify' button for the first row, and a red arrow points to it with the number '1'.

Type	Name	Request Date	Due Date	Postponed ES
Name/Identity	Omar	01/18/12	01/28/12	
Vital Statistics Identity	Omar	07/17/18	07/27/18	
School Attendance	Omar	11/06/19	11/16/19	

Steps to Clear Alert

21

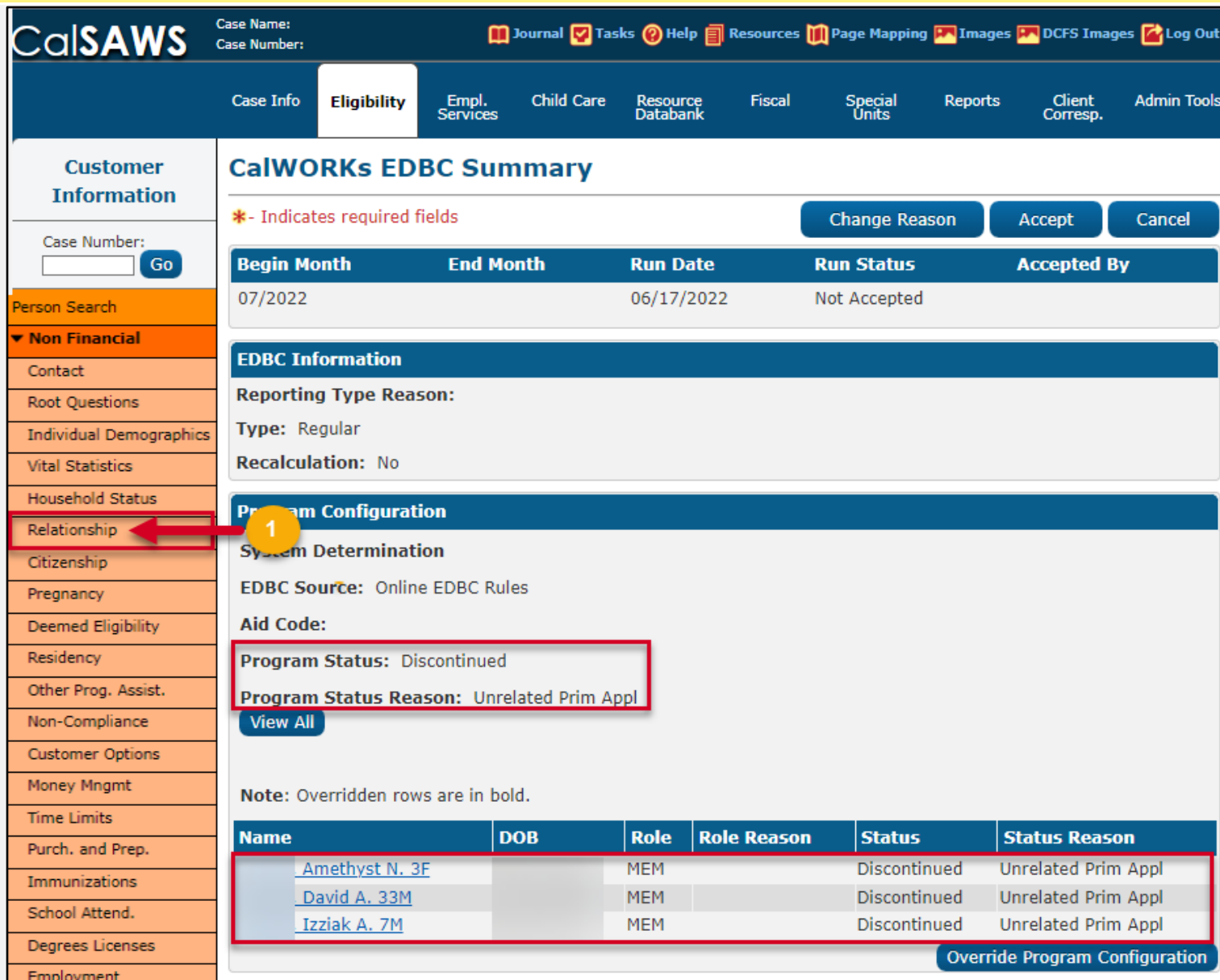
In this example, the CalWORKs program is discontinued for: **Unrelated Prim Appl** (Unrelated Primary Applicant)

1. Navigate to the **Relationship** Page to review and update any missing or incomplete records prior to re-running EDBC.

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

Create a Case – New Applicant
Establish a Case - Existing Person
JA Relationship Information – Add

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**

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Employment

CalWORKs EDBC Summary

*- Indicates required fields

Change Reason Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/17/2022	Not Accepted	

EDBC Information

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

Program Status: Discontinued

Program Status Reason: Unrelated Prim Appl

View All

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Amethyst N. 3F		MEM		Discontinued	Unrelated Prim Appl
David A. 33M		MEM		Discontinued	Unrelated Prim Appl
Izziak A. 7M		MEM		Discontinued	Unrelated Prim Appl

Override Program Configuration

Steps to Clear Alert

22 The status message on the **Relationship List** page reflects there are *no missing relationships* needing to be added to this case record.

There are **Parental Control** records reflecting **Yes**.

Users should navigate back to **Case Summary** page to review the Primary Applicant and Payee information within the CW Program.

Screenshot

CalSAWS

Case Name:
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog 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

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

Relationship List

Number of relationships remaining to be created: 0

Continue

Search Results Summary

Results 1 - 6 of 6

Display by Relationship:
All Related

From:

To:

View

Add

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
David 33M	Parent (Biological/Adoptive)	Amethyst 3F	No			Edit View History
	Parent (Biological/Adoptive)	Izziak 7M	Yes			Edit View History
Izziak 7M	Sibling (full or half)	Amethyst 3F	No			Edit View History
Mikayla 27F	Spouse	David 33M	No			Edit View History
	Parent (Biological/Adoptive)	Izziak 7M	Yes			Edit View History
	Parent (Biological/Adoptive)	Amethyst 3F	Yes			Edit View History

Steps to Clear Alert

23

On the **Case Summary Page**, review the **Case Name** (editable field), **Primary Applicant** and **Payee** information.

Review Program Members in Active Status and all Persons Associated to Case and their respective household status.

In this example the Primary Applicant, Mikayla, has been discontinued: out of the home.

Case Name: David

Primary Applicant/Recipient: Mikayla (out of home)

Payee: David

Follow county policy for case setup and Primary Applicant/Payee designation.

If a new case needs to be established, the following Job Aid is available to assist:

Create a Case – New Applicant Establish a Case - Existing Person

If it is determined that a new Primary Applicant/Payee can be added since the Case Name remains In the Home, proceed to next steps:

1. Click **View Details** to navigate to the CalWORKs Detail page.

Screenshot

CalSAWS

Case Name: David
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 HistoryLinkagesGeneral LedgerValuable HistoryPoint Of ServiceCase Copy List

Case Summary

Case Name: DavidCounty:

Companion Cases

Case Number	Case Name

RemoveAdd

Display: 07/01/2022 View

Full Case Review is required before EDBC is run and authorized. Please refer to the Manual Case Review Guide for instructions on how to proceed. Programs Affected: CalWORKs, CalFresh, Medi-Cal.

CalWORKs

Worker:

Worker ID:

Program Status: Active

RE Due Month: 10/2022 Re-Evaluate

Reporting Type: Semi-Annual Reporting

SAR Due Month: 04/2022

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

Public Assistance Indicator:

FBU: 0

Primary Applicant/Recipient: Mikayla 27F

Language: English

Phone Number:

Email: johndoe@testcalsaws.org

Payee: David 33M

Additional Correspondence Recipient: David 33M

Application Date: 08/03/2018

Name	Deprivation	Role	Role Reason	Status	Status Reason
David 33M	Absence	MEM		Active	
Mikayla 27F	Absence	MEM		Discontinued	

View WPRView Details

Steps to Clear Alert

24

On the **CalWORKs Detail** page, review the **Administrative Roles** and **Program Persons** identified on the case.

1. Click **Add** to enter a new **Administrative Role**

Screenshot

CalSAWS

Case Name: David
Case Number:

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResourceDatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number:
 Go

Person Search
EBT Account Search
Application Registration
Case Summary
Contact
Authorized Representative
Application Questions
Negative Action
New Program
New Person
Hide Person
EBT Account List
Issuance History
Auxiliary Authorization List
Expungement History
Child Support Collections
Time Limit Aid Summary
Housing Support
Home Visiting
Legacy Case
Confidentiality
ICT Summary
IAT Summary
MAGI Case Search
Customer Contact History
SB 87
Invoice History
Linkages
General Ledger
Valuable History
Point Of Service
Case Copy List

CalWORKs Detail

* - Indicates required fields

View HistorySave and ReturnCancel

Date: *
07/01/2022View Date

Program Information

Status: *ActiveStatus Reason:Source: *Self-Service Portal

Application Date: *08/03/2018EditRE Begin Month: 11/2021RE Due Month: *10/2022

Reporting Type: Semi-Annual ReportingSAR Due Month: 04/2022

Automatically Reassign When Activated: No

Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees	
Mikayla 27F	Primary Applicant/Recipient	05/05/2021			Edit
David 33M	Payee	05/05/2021			Edit
David 33M	Additional Correspondence Recipient	05/05/2021			Edit

1Add

Program Persons

Name	Role	Role Reason	Status	Status Reason	
Amethyst 3F	MEM		Active		Edit
David 33M	MEM		Active		Edit
Izziak 7M	MEM		Active		Edit
Mikayla 27F	MEM		Discontinued		

RescindReapply

Secondary Assignment

Worker

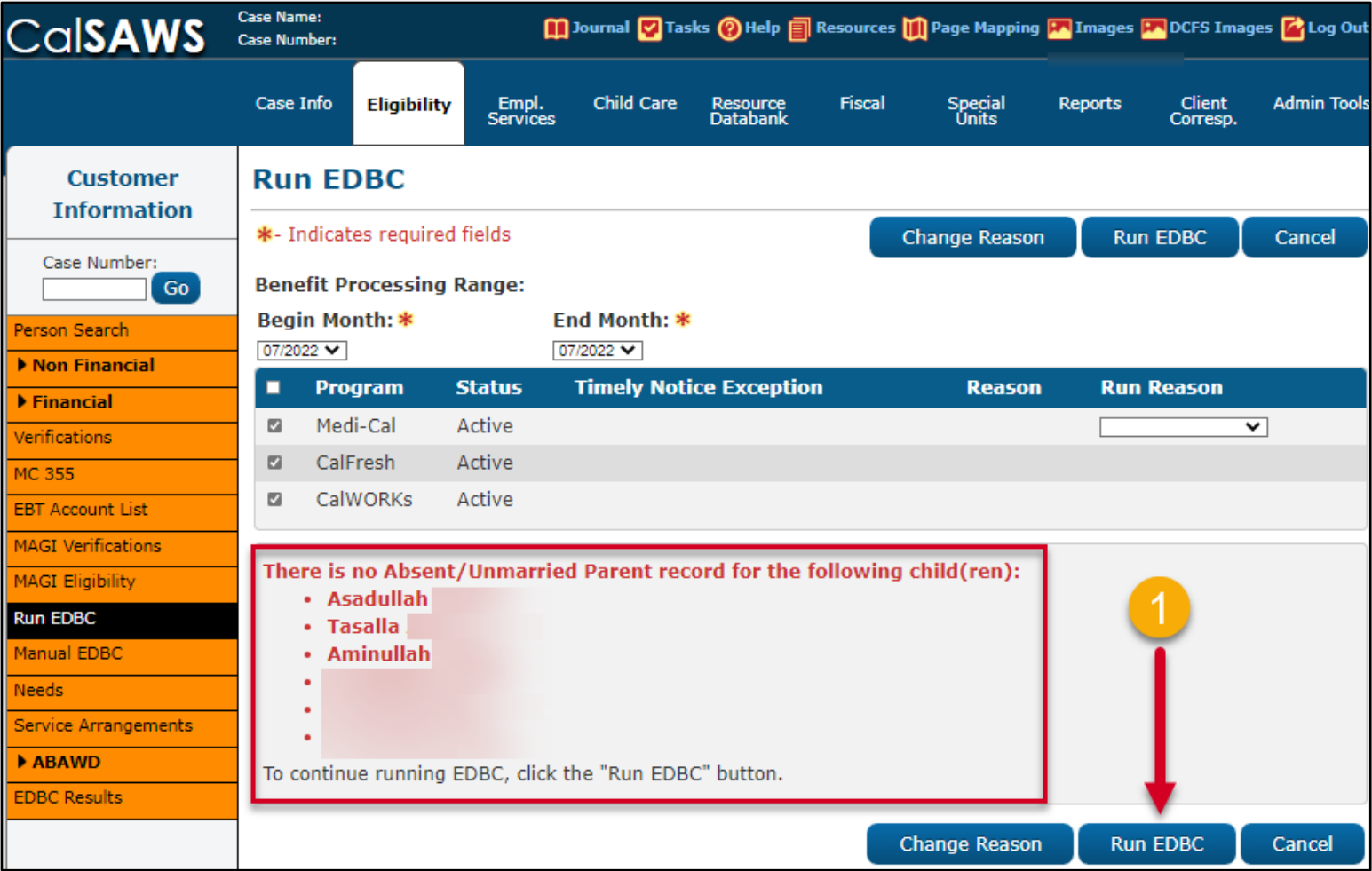
Select

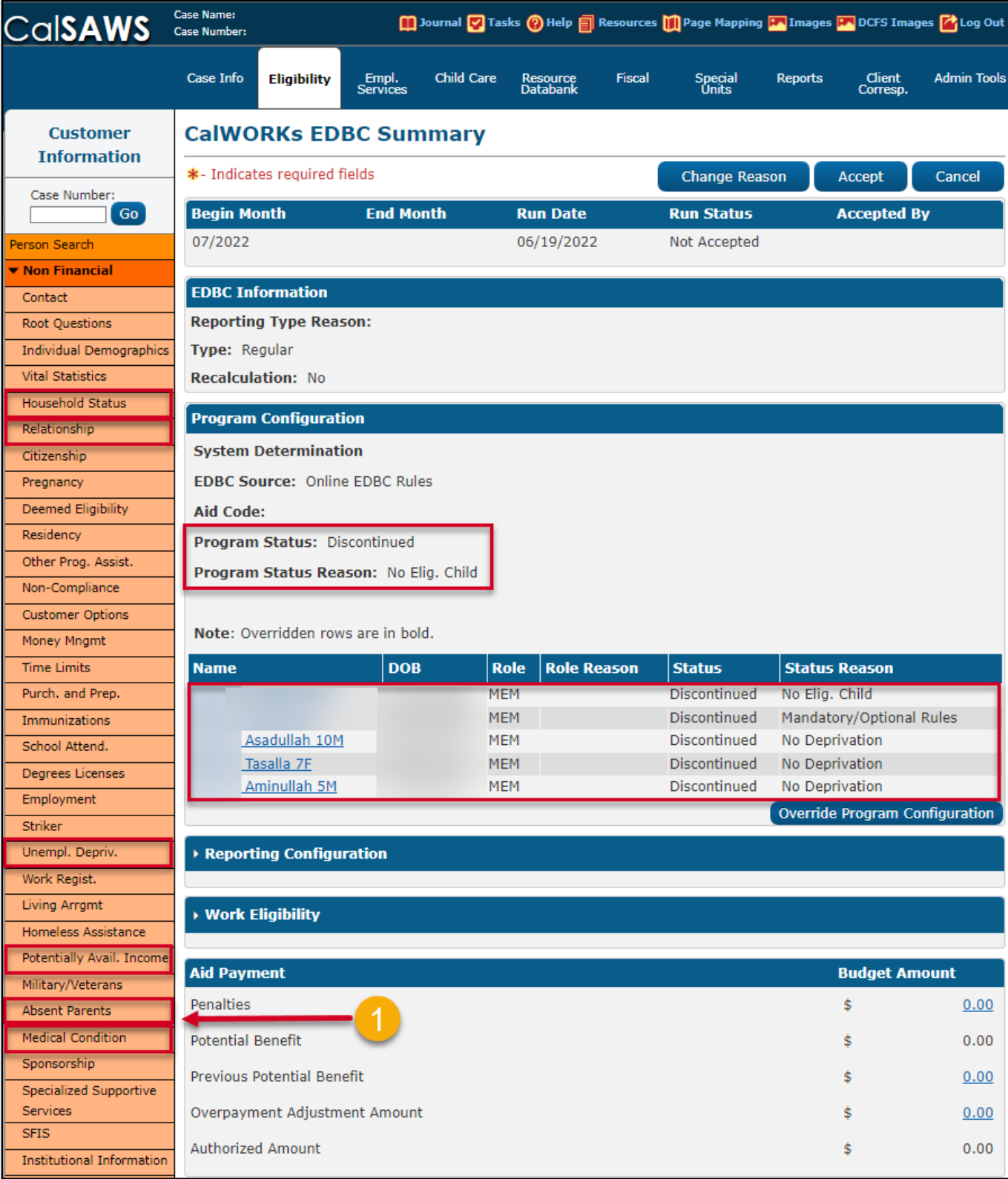
View HistorySave and ReturnCancel

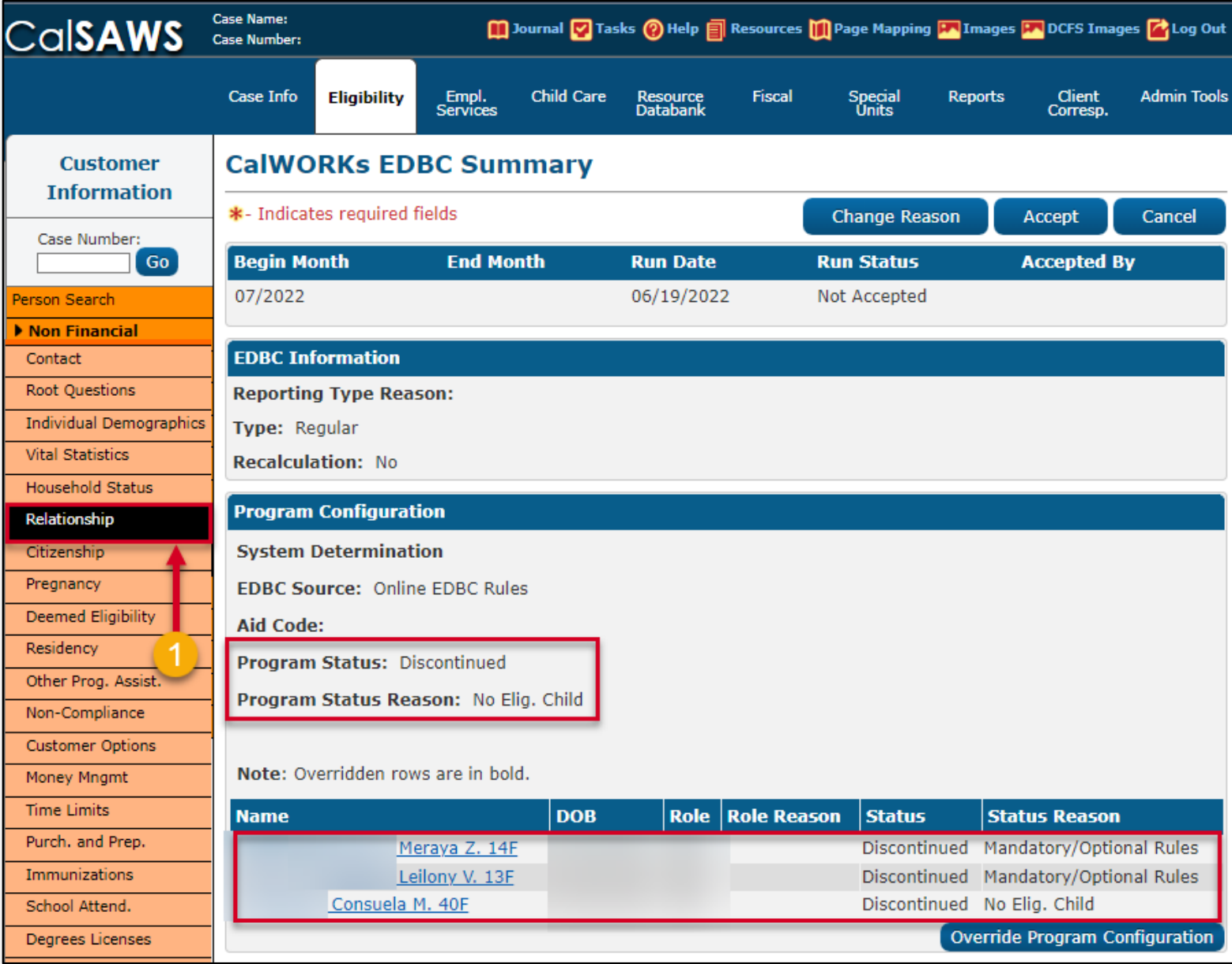
Steps to Clear Alert		Screenshot
25	In the Administrative Role Detail page: 1. Select Primary Applicant/Recipient from the dropdown selection window. 2. Select the new Primary Applicant (Case) Name. 3. Enter the Begin Month of the change. 4. Click Save and Return to update the record.	The screenshot shows the CalSAWS interface. At the top, there's a header with the CalSAWS logo and navigation links like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a sub-header with tabs for 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 'Administrative Role Detail'. It includes a 'Case Summary' sidebar on the left with links like Person Search, EBT Account Search, Application Registration, Case Summary (highlighted), Contact, Authorized Representative, Application Questions, and Negative Action. The main form has fields for 'Administrative Role' (dropdown), 'Name' (dropdown), 'Begin Month' (calendar), and 'End Month' (calendar). Red arrows and numbered circles (1-4) point to these fields: 1 points to 'Primary Applicant/Recipient' in the Administrative Role dropdown, 2 points to 'David 33M' in the Name dropdown, 3 points to the Begin Month calendar, and 4 points to the 'Save and Return' button. A status bar at the bottom indicates 'This Type 1 page took 0.54 seconds to load.'

Steps to Clear Alert		Screenshot
26	In this example, the CalFresh program is discontinued for: Over Resources 1. Navigate to the Property Page to update and verify and Individual information prior to re-running EDBC. ★ Categorically Eligible: No Public Assistance: No Modified Categorical Eligibility: No Other factors may contribute to the need for a Resource determination for this CF Program, as this HH is not conferred CE or MCE. Additional Data Collection pages to review for completion: Income, Expenses, Medical Condition, Medicare, Other Program Assistance, etc. Additional Quick Guides available in LMS and Job Aids available in CalSAWS: Property Management Income Categories and Types in the System Expense Management	 The screenshot displays the CalSAWS CalFresh EDBC Summary page. The left sidebar contains a list of sections, with 'Medical Condition' and 'Property' highlighted in red. The main content area shows the 'CalFresh EDBC Summary' with various sections. The 'Regular Program Configuration' section is highlighted with a red box, showing 'Program Status: Discontinued' and 'Program Status Reason: Over Resources'. The 'Property Eligibility' table at the bottom is also highlighted with a red box, showing 'Data Month Property: \$ 18,000.00', 'Benefit Month Property: \$ 18,000.00', 'Property Limit: \$ 3,750.00', and 'Result: Fail'. The 'Gross Income Eligibility' section is highlighted with a yellow box, showing 'Unearned Income: \$ 0.00'. A yellow circle with the number '1' is placed over the 'Gross Income Eligibility' section.

Steps to Clear Alert		Screenshot
27	In this example, the CalWORKs program is discontinued for: Over Income 1. Navigate to the Income link to review and update any Income information for prior to re-running EDBC. Ensure income is correctly entered on the Income Detail page. Ensure Begin and End Dates are correct for each income record. Additional Data Collection pages to review for completion: Other Program Assistance, Expenses, Medicare, etc. The following Job Aids are available to assist in CalSAWS: Income Categories and Types in the System Verifications - Manage	

Steps to Clear Alert		Screenshot
28	In this example, we are receiving a validation message indicating there is no Absent/Unmarried Parent record for this two-parent CalWORKs AU. 1. Click Run EDBC to navigate to the EDBC Results page.	

Steps to Clear Alert		Screenshot
29	On the CalWORKs EDBC Summary, results show the two-parent CW AU has been discontinued for: No Elig. Child (No Eligible Child) - No Deprivation. In this example, we have received the Soft Validation message indicating there was no Absent/Unmarried Parent record, so we will begin our review there. 1. Click the Absent Parent page to update Data Collection as prompted by the soft validation error message. Once updated, additional Data Collection pages to review for completion and accuracy, as this is a two-parent AU requiring a Deprivation determination: Unemployment Deprivation, Medical Condition, Potentially Available Income, Household Status, Relationship, Individual Demographics (deceased parent record if previously in the home), etc.... The following Job Aids are available to assist in CalSAWS: Child Support - Support Questionnaire Unemployment Deprivation Detail - PWE Worksheet and Detail Page Employment Detail - Add or Edit Medical Condition Detail – Disabled or SP-DDSD	 The screenshot displays the CalSAWS interface for the 'CalWORKs EDBC Summary'. The left sidebar contains a navigation menu with various sections, including 'Customer Information', 'Non Financial', 'Household Status', 'Relationship', 'Citizenship', 'Pregnancy', 'Deemed Eligibility', 'Residency', 'Other Prog. Assist.', 'Non-Compliance', 'Customer Options', 'Money Mngmt', 'Time Limits', 'Purch. and Prep.', 'Immunizations', 'School Attend.', 'Degrees Licenses', 'Employment', 'Striker', 'Unempl. Depriv.', 'Work Regist.', 'Living Arrgmt', 'Homeless Assistance', 'Potentially Avail. Income', 'Military/Veterans', 'Absent Parents', 'Medical Condition', 'Sponsorship', 'Specialized Supportive Services', 'SFIS', and 'Institutional Information'. The main content area shows the 'CalWORKs EDBC Summary' page. It includes a table for 'Begin Month', 'End Month', 'Run Date', 'Run Status', and 'Accepted By'. Below this is the 'EDBC Information' section, which includes 'Reporting Type Reason', 'Type', and 'Recalculation'. The 'Program Configuration' section shows 'System Determination', 'EDBC Source', 'Aid Code', and 'Program Status'. The 'Program Status' is 'Discontinued' and the 'Program Status Reason' is 'No Elig. Child'. A note states 'Note: Overridden rows are in bold.' Below this is a table for 'Name', 'DOB', 'Role', 'Role Reason', 'Status', and 'Status Reason'. The table lists four family members: Asadullah 10M, Tasalla 7F, and Aminullah 5M, all with a status of 'Discontinued'. The 'Aid Payment' section shows a table with 'Penalties', 'Potential Benefit', 'Previous Potential Benefit', 'Overpayment Adjustment Amount', and 'Authorized Amount', all with a budget amount of 0.00. A red arrow points to the 'Penalties' row, which is marked with a yellow circle containing the number 1.

Steps to Clear Alert		Screenshot
30	In this example, the CalWORKs program is discontinued for: No Elig. Child (No Eligible Child) – Mandatory/Optional Rules 1. Click on the Relationship link to review data collection page prior to re-running EDBC. Confirm Relationships are correctly established and verified. Verify all AU/HH Members have an In the Home record is effective as of the Application Date/BDA or earlier. Confirm all required AU/HH Members persons have been added to the Program. Additional Data Collection pages to review for No Eligible Child: Individual Demographics, Household Status, Citizenship, School Attendance, Immunizations, Other Program Assistance, Absent Parent, Unemployed Parent, Vital Statistics, Citizenship, Verifications, etc. The following Job Aids are available to assist in CalSAWS: Relationship Information – Add School Attendance Information-Add and Edit Medical Condition Detail - Fry v Saenz Welfare to Work Exemptions – Adding and Editing Sanction Process – Curing a Sanction with a Cure Sanction Activity	 The screenshot displays the CalSAWS interface. On the left, a sidebar menu under 'Customer Information' has the 'Relationship' link highlighted with a red box and a yellow circle with the number '1'. The main content area is titled 'CalWORKs EDBC Summary'. It includes a table with columns: Begin Month, End Month, Run Date, Run Status, and Accepted By. Below this is the 'EDBC Information' section, followed by 'Program Configuration' which shows 'System Determination' and 'EDBC Source: Online EDBC Rules'. The 'Aid Code' section shows 'Program Status: Discontinued' and 'Program Status Reason: No Elig. Child', both highlighted with a red box. At the bottom, a table lists individuals with columns: Name, DOB, Role, Role Reason, Status, and Status Reason. Three individuals are listed: Meraya Z. 14F, Leilony V. 13F, and Consuela M. 40F, all with a status of 'Discontinued' and reasons 'Mandatory/Optional Rules' or 'No Elig. Child'. A red box highlights this table. The 'Override Program Configuration' button is at the bottom right.

Steps to Clear Alert

31

On the **Relationship List** page, there is no **Parental Control** indicated within the record for the Primary Applicant/Parent.

1. Click **Edit** to access the **Relationship Detail** page and update the information the parental control.

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

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

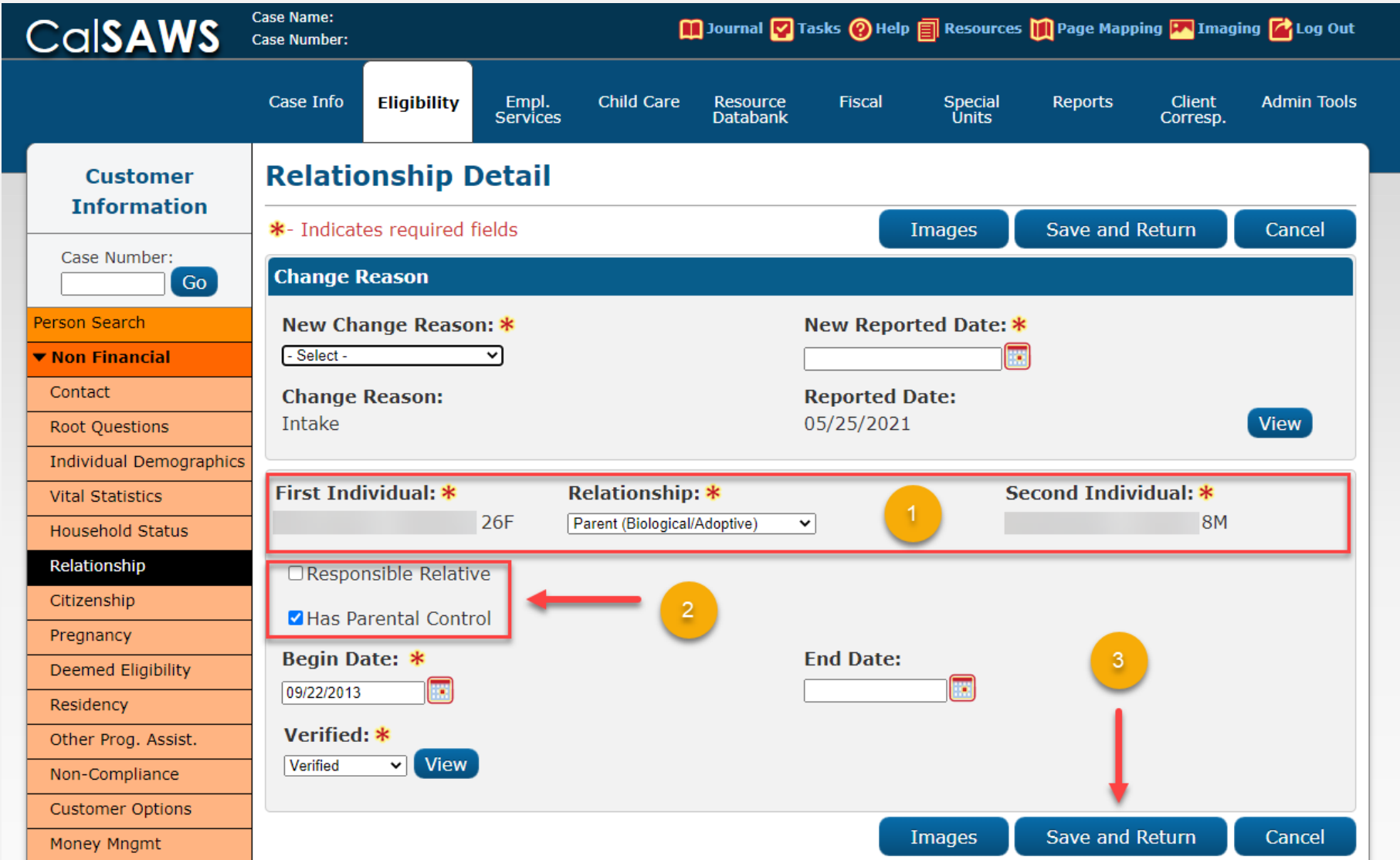
Relationship List

Number of relationships remaining to be created: 0Continue

Search Results SummaryResults 1 - 6 of 6

Display by Relationship:From:To:ViewAdd

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
Leilony 13F	Child	Consuela 40F	No	2010		EditView History
Meraya 14F	Sibling (full or half)	Leilony 13F	No	2009		EditView History
Meraya 14F	Child	Consuela 40F	No	2010	1	EditView History
Reina 17F	Child	Consuela 40F	No	2010		EditView History
	Sibling (full or half)	Meraya 14F	No	2009		EditView History
	Sibling (full or half)	Leilony 13F	No	2009		EditView History

Steps to Clear Alert		Screenshot
32	On the Relationship Detail page, Indicate the New Change Reason and New Reported Date as applicable before updating the record. 1. Confirm the Parent/Child Relationship is indicated between the First Individual and Second Individual. 2. Select the checkbox Has Parental Control and/or Responsible Relative, as applicable. 3. Click Save and Return to update the record. Quick Guide Change Reason is available in the LMS for additional information	

Steps to Clear Alert

33 On the **Relationship** List page, confirm that the **Parental Control** indicator is marked **Yes** to reflect the Primary Applicant/Payee with Parental Control is indicated on this page.

Now that the case updates have been made, navigate back to **Run EDBC** page to complete the eligibility determination on the program.

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

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Relationship List

Number of relationships remaining to be created: 0Continue

Search Results SummaryResults 1 - 6 of 6

Display by Relationship:
(All Related)

From:

To:

View

Add

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date	
Consuela 40F	Parent (Biological/Adoptive)	Leilony 13F	Yes	2010		Edit View History
	Parent (Biological/Adoptive)	Meraya 14F	Yes	2010		Edit View History
Meraya 14F	Sibling (full or half)	Leilony 13F	No	2009		Edit View History

Steps to Clear Alert

33 Once back on **CalWORKs EDBC Summary** page, note that the CW program is now Active, and all AU members are currently aided.

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

CalWORKs EDBC Summary

* - Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2022		06/19/2022	Not Accepted	

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

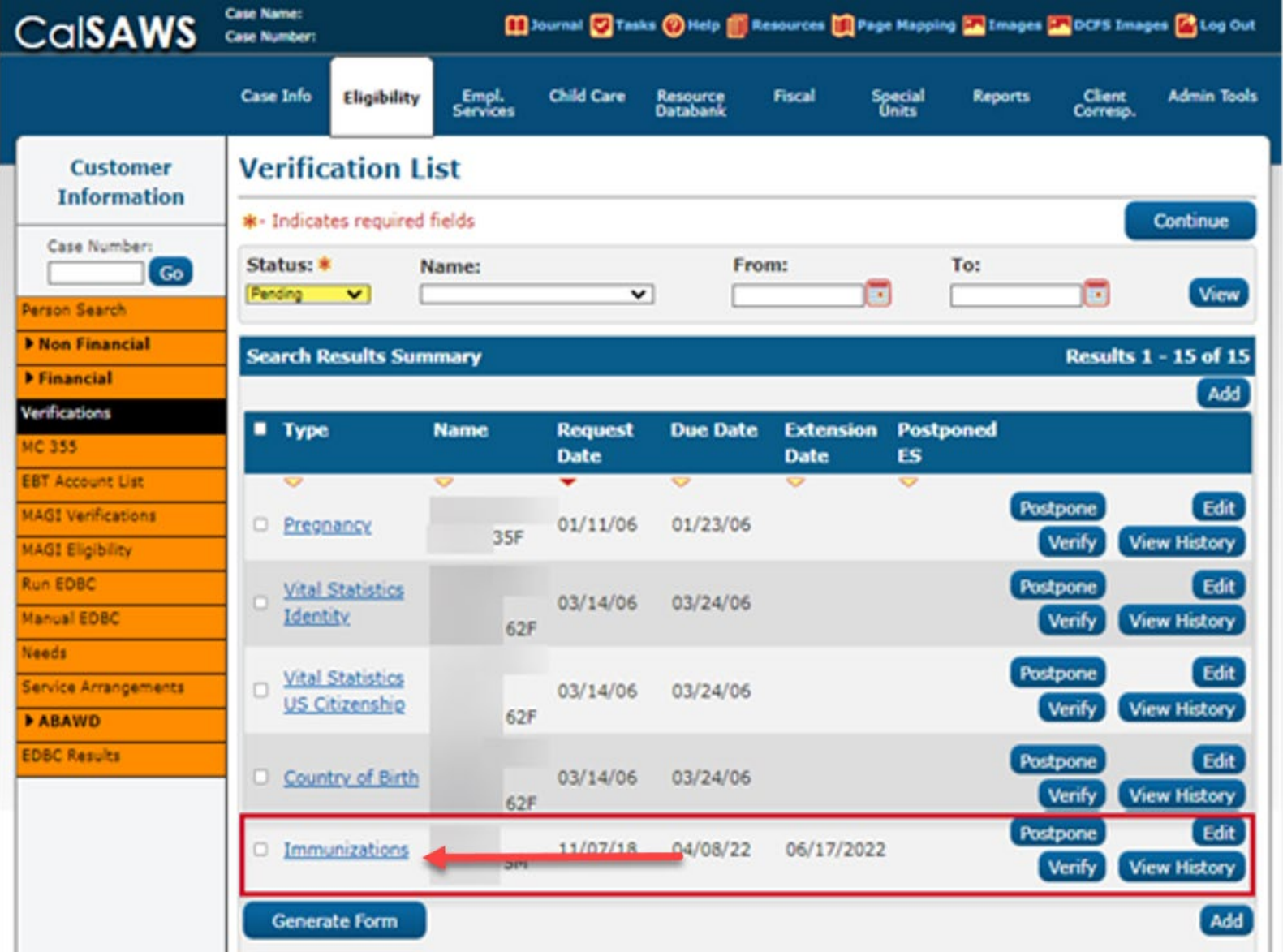
Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Meraya Z. 14F		MEM		Active	
Leilony V. 13F		MEM		Active	
Consuela M. 40F		MEM		Active	

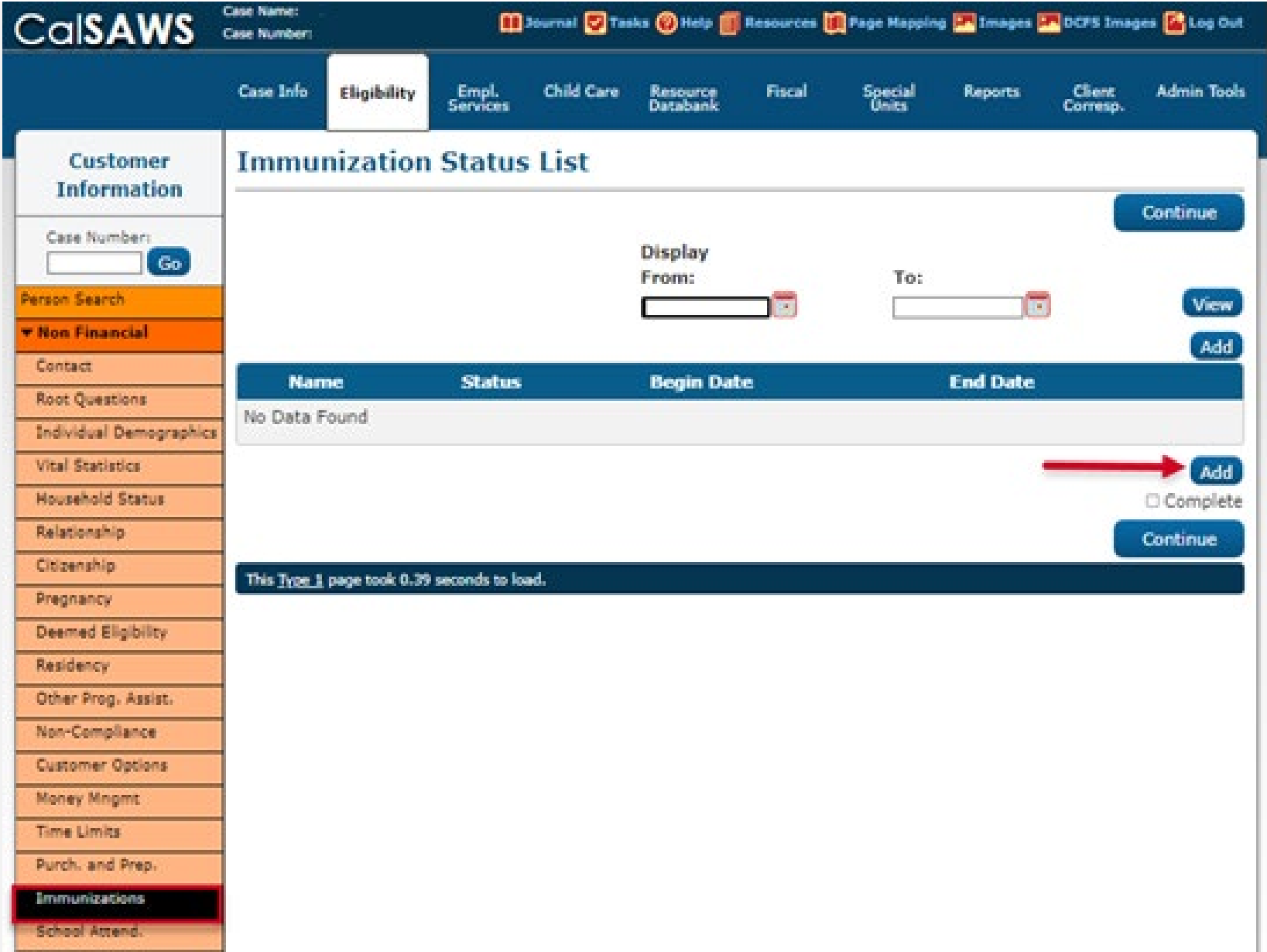
Override Program Configuration

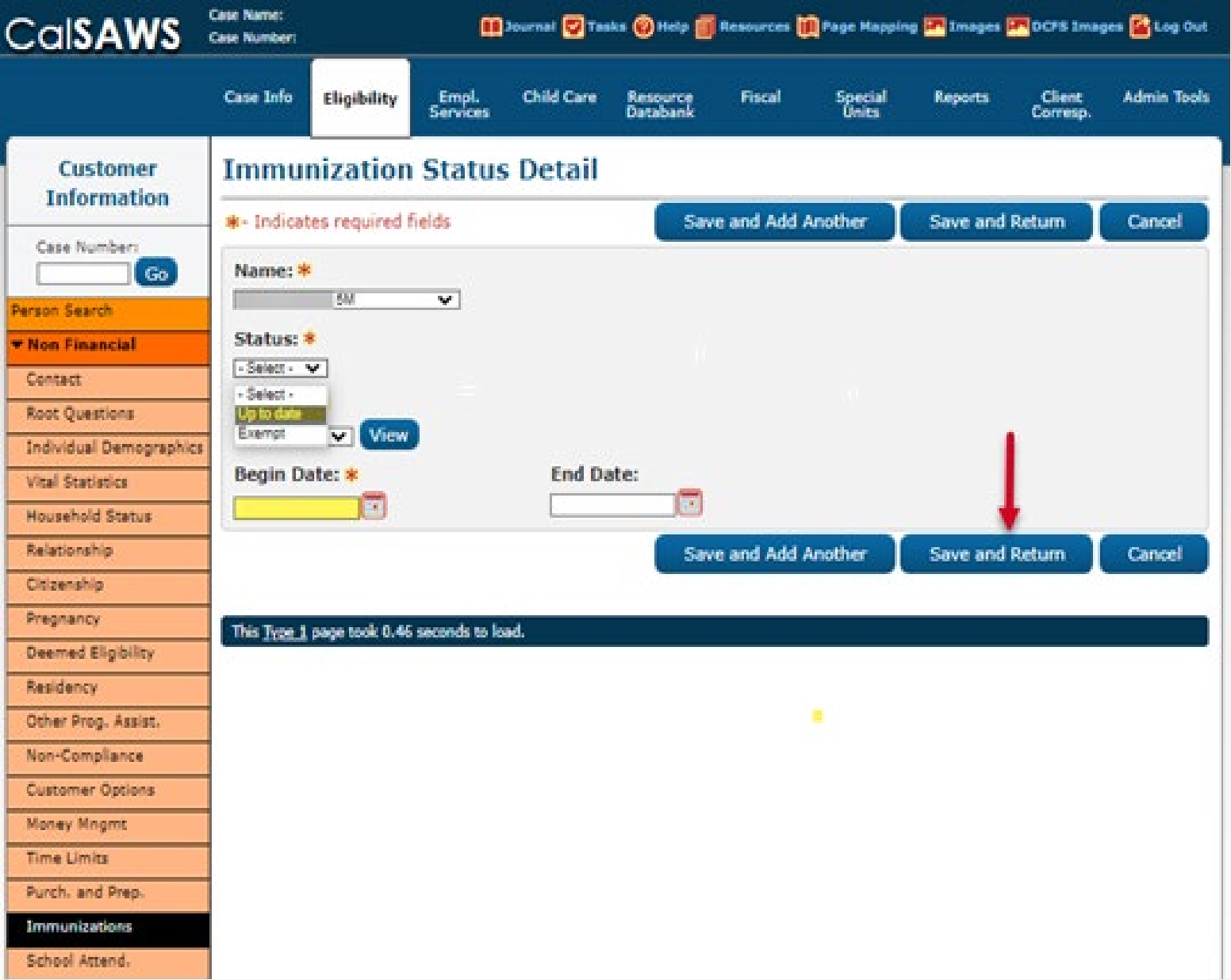
▼ Reporting Configuration

Name	Role	Adult/Child	Claiming	Deprivation
Meraya Z. 14F	MEM	Child	Federal	Absence
Leilony V. 13F	MEM	Child	Federal	Absence
Consuela M. 40F	MEM	Adult	Federal	

Steps to Clear Alert		Screenshot
34	In this example, the CalWORKs program can be impacted with a negative action if the immunization record in CalSAWS does not indicate the appropriate status such a Good Cause. In CalWIN there is an option to document a "Good Cause" entry when a child is behind on immunizations. There is no "Good Cause" option in CalSAWS. If a customer is in the process of bringing a child up to date on immunizations, it is considered that they are meeting requirements and the option of "Up to Date" would be selected. The Verification List Page would indicate if a child had a previous "Good Cause" status in CalWIN and requires an update in CalSAWS. The user can access the immunization information by clicking on the verification hyperlink labeled Immunization.	 The screenshot displays the CalSAWS interface. On the left is a sidebar with navigation links including 'Customer Information', 'Person Search', 'Non Financial', 'Financial', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC', 'Manual EDBC', 'Needs', 'Service Arrangements', 'ABAWD', and 'EDBC Results'. The main content area is titled 'Verification List' and includes search filters for Status (set to Pending), Name, From, and To. Below the filters is a 'Search Results Summary' showing 'Results 1 - 15 of 15'. A table lists verification items with columns: Type, Name, Request Date, Due Date, Extension Date, and Postponed ES. The items are: Pregnancy (35F, 01/11/06, 01/23/06), Vital Statistics Identity (62F, 03/14/06, 03/24/06), Vital Statistics US Citizenship (62F, 03/14/06, 03/24/06), Country of Birth (62F, 03/14/06, 03/24/06), and Immunizations (SM, 11/07/18, 04/08/22, 06/17/2022). The 'Immunizations' row is highlighted with a red box, and a red arrow points to the 'Immunizations' link in the Type column. Action buttons (Postpone, Edit, Verify, View History) are visible for each row. A 'Generate Form' button is at the bottom left, and an 'Add' button is at the bottom right.

Steps to Clear Alert		Screenshot
35	The user will be directed to the Verification Detail page. The user will note that the verification has a pending status. The Description will read CalWIN Conversation Immunization, an indication to the user that the immunization record previously had a Good Cause entry in CalWIN. The User will need to click on the Immunization tab located in the orange navigation bar to the left of the screen. Located under the Non-Financial column.	The screenshot displays the CalSAWS interface. On the left is a navigation menu with an orange bar containing the following items: Person Search, Non Financial (expanded), Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship, Citizenship, Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, Customer Options, Money Mgmt, Time Limits, Purch. and Prep., Immunizations (highlighted), School Attend., Degrees Licenses, Employment, Striker, Unempl. Depriv., and Work Regist. The main panel is titled 'Verification Detail' and includes tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The 'Eligibility' tab is active. The page shows a 'Type: Immunizations' section with fields for Name (SM), Status (Pending), Request Date (11/07/2018), Due Date (04/08/2022), and Date Received. The description is 'CalWIN Conversion: Immunization'. Below this are two tables: 'Extension Type' (Interim Verification, 60 Day, 04/08/2022 to 06/17/2022) and 'Program' (CalFresh, Homeless - Perm, Immediate Need, all due 04/08/2022 and received 06/30/2021). Red arrows highlight the 'Immunizations' tab, the 'Status: Pending' field, and the 'CalWIN Conversion: Immunization' description.

Steps to Clear Alert		Screenshot
36	The user will be directed to the Immunization Status List. Any existing Immunization records that converted over from CalWIN will be visible on this page. The user will need to create an Immunization record for the child to update the status. To add an Immunization record, the user will click the Add button located at the lower right side of the page.	 The screenshot shows the CalSAWS interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCPS Images, and Log Out. The sidebar on the left lists various navigation options, with 'Immunizations' highlighted. The main content area is titled 'Immunization Status List' and contains a table with columns for Name, Status, Begin Date, and End Date. The table currently shows 'No Data Found'. A red arrow points to the 'Add' button located at the bottom right of the main content area. Below the table, there is a status bar indicating 'This Type 1 page took 0.39 seconds to load.'

Steps to Clear Alert		Screenshot
37	The user will be directed to the Immunization Status Detail, where the user will be required to: 1. Select the Child's name from the drop-down menu. 2. Select the Status for the immunization record. a. Up to date: This will be the primary option to indicate the child has their immunization up to date, or if the child is granted what was previously known as “Good Cause” in CalWIN. b. Exempt: This status will be selected if the child meets one of the exemptions to immunization set forth by program rules and regulations. 3. The user will enter a Begin Date 4. Click Save and Return	 The screenshot shows the CalSAWS interface. On the left is a sidebar menu with categories like 'Customer Information', 'Person Search', 'Non Financial', and 'Immunizations'. The 'Immunizations' section is highlighted. The main area is titled 'Immunization Status Detail'. It contains a form with the following fields: 'Name' (a dropdown menu), 'Status' (a dropdown menu with 'Up to date' selected), 'Begin Date' (a date input field), and 'End Date' (a date input field). There are two sets of buttons: 'Save and Add Another', 'Save and Return', and 'Cancel' at the top and bottom of the form. A red arrow points to the 'Save and Return' button at the bottom. A message at the bottom of the page states 'This page took 0.46 seconds to load.'

Steps to Clear Alert

38 The user will be navigated back to the Immunization Status List, where the newly created Immunization record will display.

Screenshot

The screenshot displays the CalSAWS (California State Automated Welfare System) interface. The top navigation bar includes the CalSAWS logo, a 'Case Name: Case Number:' field, and links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a secondary navigation bar with tabs for 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 'Immunization Status List'. On the left is a sidebar menu with categories like Customer Information, Person Search, Non Financial, Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship, Citizenship, Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, Customer Options, Money Mngmt, Time Limits, Purch. and Prep., Immunizations (highlighted), and School Attend.

The 'Immunization Status List' section includes a 'Continue' button, a 'Search Results Summary' header, and a 'Results 1 - 1 of 1' indicator. Below this is a search filter section with 'Display From:' and 'To:' date pickers, and 'View' and 'Add' buttons. A table lists the immunization records:

Name	Status	Begin Date	End Date
SM	Up to date	11/07/2018	

Each record has an 'Edit' button. Below the table are 'Remove' and 'Add' buttons, and a 'Complete' checkbox. A 'Continue' button is at the bottom right. A footer message states: 'This Type 1 page took 0.42 seconds to load.'

39

In this example, the CalWORKs program is discontinued for: **No Appl – Req Person**

Users must include all mandatory household members in the CalFresh/CalWORKs program after conversion.

Verify all AU/HH Members have a correct **Household Status** on the bottom of the Case Summary Page

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

CalWORKs EDBC Summary

*- Indicates required fields

Change ReasonAcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
10/2022		08/31/2022	Not Accepted	

EDBC Information

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code:

Program Status: Discontinued

Program Status Reason: No Appl - Req Person

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Person 1		MEM		Discontinued	No Appl - Req Person
Person 2		MEM		Discontinued	No Appl - Req Person

Override Program Configuration

► Reporting Configuration

► Work Eligibility

Steps to Clear Alert

- 1. Place the cursor over **Eligibility** on the Global navigation bar and select Case Summary from the Local navigator.
- 2. Under the impacted program block, click the **View Details** button to navigate to the Program Detail page.
- 3. Click the **Edit** button in the upper righthand corner of the page to access the Program Detail page in Edit mode.
- 4. Under the Program Persons block, click the **Add** or **Reapply** button and associate the mandatory household member(s) to the program.

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

Case Summary

Case Number:

Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Application Questions

Negative Action

New Program

New Person

Hide Person

EBT Account List

Issuance History

Auxiliary Authorization List

Expungement History

Child Support Collections

Time Limit Aid Summary

Housing Support

Home Visiting

Legacy Case

Confidentiality

ICT Summary

IAT Summary

MAGI Case Search

Customer Contact History

SB 87

Invoice History

CalWORKs Detail

*- Indicates required fields

View History

Save and Return

Cancel

Date: *

View Date

Program Information

Status: *

Active

Status Reason:

Source: *

Self-Service Portal

Application Date: *

Edit

RE Begin Month:

07/2021

RE Due Month: *

Reporting Type:

Semi-Annual Reporting

SAR Due Month:

12/2021

Automatically Reassign When Activated:

No

Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees
	Primary Applicant/Recipient	09/01/2021		Edit
	Payee	05/26/2021		Edit
Add				

Program Persons

Name	Role	Role Reason	Status	Status Reason
Person 1	MEM		Active	Edit
Person 2	MEM		Active	Edit
Person 3	MEM		Denied	
Rescind Reapply				

Steps to Clear Alert

Now that the case updates have been made, navigate back to **Run EDBC** page to complete the eligibility determination on the program.

Confirm all required **AU/HH Members** persons have been added to the Program.

The following Job Aids are available to assist in CalSAWS:

JA Add a Person to an Existing Case and Existing Program

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 History

New / Reapplication Detail

*- Indicates required fields

View Date:
10/01/2022

Program Type:
CalWORKs

Primary: *

Application Date: *

Requested BDA: *

Source:
Self-Service Portal

Cash-based Medi-Cal BDA:

☒	Name *	DOB	Role	Role Reason	Status	Status Reason
☐	Person 2		MEM		Active	
☒	Person 3		MEM		Denied	
☐	Person 1		MEM		Active	

Save and Return

Cancel

This Type 1 page took 0.41 seconds to load.

Steps to Clear Alert		Screenshot
40	Once all data collection pages have been updated, the User can run EDBC, review and accept program determinations, and save the new EDBC results. Review and send any applicable Notices of Action. If the NOA is not reviewed it will go out due to an overnight batch process. Journal the action taken according to county policy. Navigate back to the Case Summary page. The case review is complete!	 The screenshot shows the CalSAWS interface. At the top, there's a header with the CalSAWS logo and navigation links: Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a sub-header with tabs: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Case Summary' and includes a search bar for Case Number with a 'Go' button. Below the search bar is a list of links: Person Search, EBT Account Search, Application Registration, Case Summary (highlighted), Contact, Authorized Representative, Application Questions, and Negative Action. To the right of the search bar is a section for 'Companion Cases' with fields for Case Number and Case Name, and an 'Add' button. At the bottom, there's a 'Display:' section with a date field set to 07/01/2022 and a 'View' button. A large red text overlay reads 'Yellow Banner cleared!'.