

EDBC – Overriding Program Configuration

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Purpose

The purpose of this job aid is to provide instructions for overriding an EDBC program configuration for persons and programs on a case.

Override a Program Configuration

It is recommended that you override the program or persons configuration when the System's determination is incorrect for a reason other than incorrect data entry. Refer to your County's policy for determining when to override an EDBC.

The following steps assume you are in the context of a case.

Step	Action
1.	Place the cursor over Eligibility on the Global navigation bar.
2.	Select Customer Information from the Local navigator.
3.	Click Run EDBC on the Task navigation bar.
4.	On the Run EDBC page: a) Confirm or select <Begin Month> from the Begin Month drop list. b) Confirm or select <End Month> from the End Month drop list. c) Confirm or select the checkbox next to <Program> . d) Click the Run EDBC button.
5.	On the EDBC List page: a) Click the <Program> hyperlink with a Run Status of Not Accepted .
6.	On the <Program> EDBC Summary page: a) Click the Override Program Configuration button. Note: Depending on assigned security rights, you may or may not have access to this button.

Program Configuration Override List Page

The Program Configuration Override List page displays the System's determination of eligibility to benefits and allows you to override the program configuration. When processing an EDBC override, you must select an EDBC Override Reason.

Depending on the program you are overriding, the System Determination section may display the following information:

- EDBC Source Code
- Aid Code
- Program Status
- Program Status Reason
- Reporting Type
- Reporting Type Reason

The User Override section is where you override the program configuration. If you select a program status other than Active, then a Program Status Reason is required. If a reporting type is displayed in the System Determination section, then one is required in the User Override section.

The Program Configuration section is where you override the configuration for a person. Each person on the program is listed in this section. Click the Override button next to the person you wish to override to access the Program Configuration Override Detail page.

Note: When a person's configuration was previously overridden, the System determined person configuration is bolded.

Program Configuration Override Detail Page

The Program Configuration Override Detail page allows you to override the program configuration for a specific person.

The System Determination section displays the System's determination for the person.

Complete the User Override section to override the person's configuration. When a role other than MEM is selected, a Role Reason is required.

Note: The System automatically assigns roles based on the information entered on the data collection pages. For more information on the System's eligibility roles, refer to **JA Eligibility Role Assignment**.

Complete the Status Reason drop list when a Status other than Active is selected.

When a mixed aid code is selected on the Program Configuration Override List page, Federal or Non-Federal must be selected from the Claiming Code drop list.

Adult or Child must be selected from the Adult Child Code drop list.

Saving Program Configuration Override

To save the override, the following pages must be accepted and saved:

- Program Configuration Override Detail
- Program Configuration Override List
- <Program> EDBC
- EDBC List

Note: If you click the Cancel button on any of these pages, the program configuration override will not be saved.

Override Medi-Cal EDBC Summary

The Medi-Cal EDBC Override Summary page allows you to override the configuration for persons on the Medi-Cal (MC) program. To start the override process, click the Override Medi-Cal Summary button on the Medi-Cal EDBC Summary page. Depending on your assigned security rights, you may or may not have access to this button.

By clicking the Override Medi-Cal Summary button, you access the Medi-Cal EDBC Override List page. On this page, you must select an EDBC Override Reason.

Click the Override button in the Medi-Cal Summary page section to override the person's configuration. On the Medi-Cal EDBC Override Detail page, the following fields are required:

- Test Result
- SOC
- % Obligation
- Members Tested
- Role
- Role Reason
- Aid Code

Note: The Role Reason is only required when FRI or UP is selected as the Role. When a person is eligible to multiple aid codes, click the Add button to add additional aid codes.

Override Medi-Cal Share of Cost (SOC)

There are situations that require overriding the Share of Cost.

The following step action will walk you through changing the SOC and assumes you are on the Medi-Cal EDBC Summary page.

Step	Action
1.	On the Medi-Cal Summary page: a) Click the Override Medi-Cal Summary button.
2.	On the Medi-Cal EDBC Override List page: a) Click the Override button for the passing MC Income budget.
3.	On the Medi-Cal EDBC Override Detail page: a) In the User Override page section, enter <SOC> in the SOC field. b) Click the Save and Return button.
4.	On the Medi-Cal EDBC Override List page: a) Select <EDBC Override Reason> from the EDBC Override Reason drop list. b) Click the Save and Return button.
5.	On the Medi-Cal EDBC Summary page: a) Click the Accept button.
6.	On the EDBC List page: a) Click the Save and Continue button.

Note: Depending on your role, the EDBC Run Status will update from Not Accepted to Pending Authorization. Follow your County policy for authorizing overridden budgets. Supervisor authorization may be required for overridden budgets.

Saving Medi-Cal EDBC Summary Override

To save the override, the following pages must be accepted and saved:

- Medi-Cal EDBC Override Detail
- Medi-Cal EDBC Override List
- Medi-Cal EDBC Summary
- EDBC List

Note: If you click the Cancel button on any of these pages, the Medi-Cal EDBC Summary override will not be saved.

Override Foster Care Aid Code

The Foster Care EDBC Override Detail page allows you to override an aid code for persons on the Foster Care program.

The following fields are required on the Foster Care Aid Code Override Detail page:

- EDBC Override Reason
- Aid Code
- Begin Date
- Rate Structure

Note: You can only access the Foster Care Override Detail page for a single-month EDBC. The Edit button does not display for multi-month EDBCs. If you need to override multiple months, you will need to complete the process below for each month.

Step	Action
1.	Run EDBC for Foster Care for the desired month.
2.	On the EDBC List page: a) Click the Program hyperlink with a Run Status of Not Accepted .
3.	On the Foster Care EDBC Summary page: a) Click the Edit button in the Aid Code Information page section.
4.	On the Foster Care EDBC Override Detail page: a) Select <Override Reason> from the EDBC Override Reason drop list. b) Select <Aid Code> from the Aid Code drop list. c) Confirm that the correct Begin Date populates in the Begin Date field. d) Confirm that the correct Rate Structure populates in the Rate Structure field. e) Click the Save and Return button.
5.	On the Foster Care EDBC page: a) Review the EDBC results. b) Click the Accept button.
6.	Review and accept the EDBC results for any other months for which EDBC was run.
7.	On the EDBC List page: a) Click the Save and Continue button.

CalWORKs (CW) Family Reunification

CW Family Reunification program provides for the continuation of CW services for up to 180 days when a child has been removed from the home and is receiving out-of-home care. CW services include Welfare to Work activities and supportive services.

CW recipients that are eligible to participate in the Family Reunification program are processed using Program Configuration Override.

In order for the parent(s) to receive services through the CW Family Reunification program, they are to remain active members on the CW program.

To set up the case for CW Family Reunification, take the following actions:

Step	Action
1.	Confirm that the CalWORKs program is assigned to a worker.
2.	Reassign the program if needed. Note: (JA Workload Assignment for instructions on reassigning a case from one worker to another; or the Worker Assignment section in JA Establish a Case: New Applicant for instructions on assigning an unassigned program to a worker).
3.	On the Household Status Detail page: a. Add a new household status record for the child. b. Select Child in Foster Care/Kin-GAP from the New Change Reason drop list, c. Select the name of the minor child from the Name drop list, d. Select Permanently Out of the Home from the Living in the Home Status drop list, e. Enter the date the change was reported in the Begin Date field. f. Click Save and Return
4.	Run EDBC for all programs. Note: You can only access the override pages for a single-month EDBC. The Override buttons do not display for multi-month EDBCs. If you need to override multiple months, you will need to complete the process below for each month.

Complete the steps below to override the EDBC results:

Step	Action
1.	On the EDBC List page: a) Click the CalWORKs hyperlink to access the CalWORKs EDBC Summary page.
2.	On the CalWORKs EDBC Summary page: a) Click the Override Program Configuration button.
3.	On the Program Configuration List page: a) Select CalWORKs Family Reunification from the EDBC Override Reason drop list. b) Select <Appropriate CW Family Reunification Aid Code> from the Aid Code drop list; either 4P for a single parent or 4R for a two-parent household. c) Select Active from the Program Status drop list. d) Select <SAR or ARCO, as appropriate> from the Reporting Type drop list. e) Click the Override button for the parent.

Step	Action
4.	<p>On the Program Configuration Override Detail page:</p> <ul style="list-style-type: none"> a) Confirm that MEM is selected from the Role drop list. b) Select Active from the Status drop list. c) Confirm that Adult is selected from the Adult Child Code drop list. d) Click the Save and Return button. <p>Note: For a two-parent household, repeat Steps 3e through 4d for the second parent.</p>
5.	<p>On the Program Configuration List page:</p> <ul style="list-style-type: none"> a) Click the Override button for the child.
6.	<p>On the Program Configuration Detail page:</p> <ul style="list-style-type: none"> a) Select UP from the Role drop list. b) Select CalWORKs Family Reunification from the Role Reason drop list. c) Select Active from the Status drop list. d) Select Blank from the Status Reason drop list. e) Select Blank from the Adult Child Code drop list. f) Click the Save and Return button. <p>Note: Repeat Steps 5a through 6f for each child on the program.</p>
7.	<p>On the Program Configuration Override List page:</p> <ul style="list-style-type: none"> a) Click the Save and Return button.
8.	<p>On the CalWORKs EDBC Summary page:</p> <ul style="list-style-type: none"> a) Click the Payment Override button. <p>Note: The Payment Override button does not display on the EDBC Summary page if the Authorized Amount from the online EDBC is zero. In such cases, you do not need to override the payment amount. Proceed to Step 10.</p>
9.	<p>On the Payment Override Detail page:</p> <ul style="list-style-type: none"> a) Select CalWORKs Family Reunification from the Override Reason drop list. b) Enter "0.00" in the Override Amount field. c) Click the Save and Return button.
10.	<p>On the CalWORKs EDBC Summary page:</p> <ul style="list-style-type: none"> a) Click the Accept button.
11.	<p>Review and accept the EDBC results for any other programs for which EDBC was run.</p>
12.	<p>On the EDBC List page:</p> <ul style="list-style-type: none"> a) Click the Save and Continue button.

All overridden EDBC results require supervisor authorization. The previous CW program configuration and aid code will continue to display on the Case Summary page until the overridden EDBC is authorized.

Generate a Manual NOA

Once an EDBC is overridden and saved, the System will not auto-generate a NOA. Follow your County policy when generating a NOA when overriding EDBC.

Refer to **JA Forms and NOA's** for step-by-step instructions on generating a NOA.

Add a Journal Entry

Follow County policy when adding journal entries to a case.

Refer to **JA Journal and Reminders** for step-by-step instructions on adding a journal entry to a case.