

CalSAWS

California Statewide Automated Welfare System



Design

CA-295132

End-Date EDBC Authorization after Rejection of High-Dated EDBC

DOCUMENT APPROVAL HISTORY

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CA-295132 – End-Date EDBC Authorization after Rejection of High-Dated EDBC

1 OVERVIEW

An EDBC that may require supervisor authorization and gets rejected by the supervisor will need to have the high dated EDBC benefit period end dated so that CalSAWS does not show the rejected benefit period for the case at the next EDBC determination.

1.1 Current Design

An EDBC may require supervisor authorization, which may be approved or rejected. If the EDBC is rejected, it remains a saved EDBC still viewable in EDBC results. A rejection status can be met within one of the following conditions:

- a. A worker's random sampling limit has been reached, and authorization needs to be completed by a supervisor. The Supervisor rejects the benefit period months due to any authorization rejection reason.
- b. Program requires 2nd level county authorization and worker does not have security rights to authorize the case. Supervisor rejects the benefit period due to any authorization rejection reason.

1.2 Requests

When a supervisor rejects a high-dated EDBC, that EDBC remains saved with a high-dated end date. This causes that program to remain subject to EDBC authorization, even when future EDBC's are run, including EDBC's run by staff that do not require authorization.

1.3 Overview of Recommendations

1. Update EDBC rejection logic to end-date the determination when a benefit period is rejected.
2. DCR to End date existing records with rejected status and a high-dated EDBC end date

1.4 Assumptions

1. This change will be made irrespective of EDBC being run at intake, mid-period, rescind, RE or SAR periods.
2. There is no effective date for the changes added with this SCR. Running EDBC for a month prior to the implementation of this SCR will apply the logic from this SCR.
3. There will be no impact to EDBC's that are accepted by supervisor(s).
4. There will be no impact to EDBC's that have not yet received a status.

5. When a supervisor or deputy rejects one benefit period, it will reject all benefit periods that are in pending authorization status for the same rejection reason. Rejection logic updates all EDBC benefit months at once.
6. This SCR will not apply any additional functionality check on programs if one program is set to pending authorization, but another program is not. When EDBC is attempted to re-run for other program, validation message will appear that a "pending authorization record exists, if you run EDBC, these records will be deleted"

2 RECOMMENDATIONS

When a county worker runs an EDBC determination that requires supervisor approval to accept and save, the supervisor may either approve or reject the high-dated EDBC benefit period. If the high-dated EDBC benefit period is instead rejected by the supervisor, CalSAWS will end the benefit period so that it is no longer viewable the next time an EDBC determination is performed on the CalSAWS case.

2.1 [Page Name] - No Impact

2.2 Eligibility Rules Update to end date Rejected High dated Supervisor EDBC determination

2.2.1 Overview

EDBC determination for the program will not maintain a high-dated benefit period when the program's run status is rejected. An end date will populate for the benefit period so that it is not an open-ended benefit period.

2.2.2 Description of Changes

1. EDBC rejection Java rules needs to populate an end date upon rejection of a benefit period month (as seen in picture example below) for any program that is run in CalSAWS:

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
04/2025	08/2025	Medi-Cal	Regular	Accepted - Saved	Details	02/27/2025	Online EDBC Rules
08/2025	08/2025	CalFresh	Regular	Rejected	Fail	07/09/2025	Online EDBC Rules
08/2025	08/2025	CalFresh	Regular	Accepted - Saved	482.00	07/29/2025	Online EDBC Rules
09/2025	09/2025	CalFresh	Regular	Accepted - Saved	482.00	08/18/2025	Batch EDBC Rules
09/2025	12/2025	Medi-Cal	Regular	Accepted - Saved	Details	08/18/2025	Batch EDBC Rules
10/2025	12/2025	CalFresh	Regular	Accepted - Saved	499.00	09/14/2025	Batch EDBC Rules
01/2026	01/2026	CalFresh	Regular	Accepted - Saved	494.00	12/13/2025	Batch EDBC Rules
01/2026	03/2026	Medi-Cal	Regular	Accepted - Saved	Details	12/13/2025	Batch EDBC Rules
02/2026	02/2026	CalFresh	Regular	Rejected	545.00	02/25/2026	Online EDBC Rules
02/2026	02/2026	CalFresh	Regular	Accepted - Saved	97.00	02/25/2026	Online EDBC Rules
03/2026	03/2026	CalFresh	Regular	Accepted - Saved	545.00	02/25/2026	Online EDBC Rules
03/2026	03/2026	CalFresh	Regular	Rejected	545.00	02/25/2026	Online EDBC Rules
03/2026	03/2026	CalFresh	Regular	Accepted - Saved	0.00	03/05/2026	Online EDBC Rules
04/2026	04/2026	CalFresh	Regular	Rejected	545.00	02/25/2026	Online EDBC Rules

2. The Run_stat_code will be in 'RR' or 'RE' status in the EDBC table with a high dated – end date record.
 - a. Authorization rejection reason can be any of the following:
 - i. Incorrect Case Information
 - ii. Incorrect EDBC Determination
 - iii. Missing Documents
 - iv. Missing Journals
 - v. Other
3. Upon rejection of a benefit period, EDBC rejection logic will allow EDBC to be accepted and saved at the time of re-run for future EDBC benefit months created so that new EDBC determination can be properly determined and not pend authorization. The following caveats will persist:
 - a. If the same eligibility worker that triggered the initial 'pending authorization' for the case is re-running EDBC and the eligibility worker attempts to accept and save EDBC benefit months post rejection, then the case will re-trigger 'pending authorization' status for supervisor to review EDBC again.

- b. If a new worker who didn't initially trigger the initial 'pending authorization' status is re-running EDBC on a case that was previously rejected and worker has the ability to accept and save the case then EDBC will not return to a 'pending authorization' status and instead will accept and save the EDBC determination.

Note: A worker with a worker level of 'Eligibility Worker' can trigger pending authorization. A Supervisor or Deputy with 1st level authorization and 2nd level authorization will have ability to accept and save a case without triggering 'Pending authorization' status unless a 2nd level authorization is required then 1st level authorization supervisor will trigger a pending authorization as well.

2.2.3 Example Scenarios

Disclaimer: The below scenarios are not requirements. They are meant to help guide understanding and testing and may mention items that are not being changed by the specific language in the requirements.

1. County Worker A is working on a CF case that requires second level county authorization. Worker A runs EDBC and attempts to approve benefit periods for February, March, and April 2026. Because a second level authorization is required, the following will occur:
 - The case is set to a status of pending authorization for supervisor to review.
 - The supervisor reviews the EDBC determination and rejects it due to an incorrect eligibility determination. As a result, the benefit months 2/2026, 3/2026, and 4/2026 are now in rejected status, and those benefit periods receive an end date in the system.
 - If County Worker B later runs EDBC again, the system will re-trigger a pending authorization status as second level authorization is required, and the case will require another supervisor review before benefits can be approved.
 - If County Worker A later runs EDBC again, as County Worker A initially triggered the pending authorization then upon re-run of EDBC, benefit status will return to pending authorization.
2. County Worker A is working on a CF case. Worker A runs EDBC and attempts to approve benefit periods for February, March, and April 2026. Because the worker has reached 100% random sampling, the following will occur:
 - The case is set to a status of pending authorization for supervisor to review.
 - The supervisor reviews the EDBC determination and rejects it due to an incorrect eligibility determination. As a result, the benefit months 2/2026, 3/2026, and 4/2026 are now in rejected status, and those benefit periods receive an end date in the system.
 - If County Worker B later runs EDBC again, as County Worker B has NOT reached 100% random sampling and the case does not require

second level authorization then County Worker B is able to accept and save benefit months 2/2026, 3/2026, and 4/2026.

- If County Worker A later runs EDBC again, as County Worker A initially triggered the pending authorization then upon re-run of EDBC, benefit status will return to pending authorization.

2.2.4 Programs Impacted

All programs

2.2.5 Performance Impacts

No Performance Impact

2.3 DCR to end date high dated rejected benefit months

2.3.1 Overview

A one-time Data change request is needed to end date all high dated records in the EDBC table with a rejected status code.

2.3.2 Description of Changes

1. Create a one-time data change to end date any high dated record with a run_stat_code of 'RR' or 'RE'

- a. The end date needs to be set to match the end of the month of the begin date for that record

Ex: Begin date is set to 3/2026 then End date is set to 3/2026

2.3.3 Estimated Number of Records Impacted/Performance

1,193,805 Potentially impacted records/ Performance test

Note: When running DCR, suggest skipping event streaming and super trigger.

2.4 [Batch Name] - No Impact

2.5 [Interface Name] - No Impact

2.6 [eHIT] - No Impact

2.7 [Form/NOA Name] - No Impact

2.8 [Report Name] - No Impact

2.9 [Data Warehouse Name] - No Impact

2.10 [Data Change] - No Impact

2.11 Automated Regression Test

2.11.1 Overview

Create new and update existing regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.11.2 Description of Change

1. Evaluate each system test scenario for the potential of automation. Known exclusionary criteria:
 - a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
 - b. Technical limitations (ex., visual comparison of a static document against a template)
 - c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
 - d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
 - a. Repeatability: The script must be able to execute multiple times between data refreshes.
 - b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario.

3 SUPPORTING DOCUMENTS

No Impact

4 OUTREACH

4.1 Lists – No Impact

5 APPENDIX

No Impact