CalSAWS | Information Transmittal (CIT) 0043-20

☐ **CalSAWS DD&I** ☒ **C-IV M&O** ☐ **CalWIN M&O** ☒ **LRS M&E**

Distribution Date:	April 2, 2020
To:	PPOC.40, Consortium.RegionalManagers.All, Consortium.CalWORKs_CalFresh.All
CIT Name:	COVID-19 Interim Instructions to Run EDBC Beyond RE/RC Month
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

☐ General
☒ Policy
    ☒ CW
    ☒ CF
    ☐ MC
    ☐ CMSP
    ☐ FC/KG/AAP
    ☐ Child Care
    ☐ WtW
    ☐ Other Program(s):
☐ C4Yourself   ☐ Your Benefits Now!
☐ Customer Correspondence
☐ Other_____

☐ Reports
    ☐ Fiscal
    ☐ Caseload Movement
    ☐ Management
☐ Fiscal
☐ Security
☐ Batch and Interfaces
☐ Imaging
☐ Migration
☐ Conversion
☐ Technical
☒ Training
☒ Help Desk

| Description:
(Including any step-by-step instructions) | **Purpose**
This CIT affects LRS and the 39 C-IV Counties. The purpose of this CIT is to provide instructions on running EDBC for a benefit month following the Redetermination/Recertification (RE) due month when action must be taken on the case, but the RE was not completed.

Background
The California Department of Social Services (CDSS), in response to the State of California Executive Order N-29-20, approved suspending the automated system (batch) processing to discontinue CalWORKs (CW) and CalFresh (CF) programs due to SAR 7 and RE (refer to CIT 0034-20 COVID-19/Governor's Executive Order – Suspension of Semi-Annual Reporting/Re-Determinations/Re-Certifications).
This was done to allow for ongoing benefits to continue during the COVID-19 emergency following the Governor's Executive Order.

SCR CA-214505/CIV-106735 (Suspend Skip Issuance and Disc Sweeps for Incomplete RE/SAR 7 COVID-19) was implemented on 3/20/20 to suspend |

automatic batch discontinuances for cases that were targeted to be discontinued effective April and May due to not submitting or completing the RE or SAR process.

Additional Information
SCRs CA-214635/C-IV-106787 (Advance CW/CF RE Due Month for March - May 2020) will implement system updates to move out RE dates per direction from CDSS. These SCRs are scheduled for implementation on April 30, 2020. Until those changes are implemented, users will encounter EDBC Validations that will prevent them from running EDBC for any months beyond the RE due month.

<u>C-IV System:</u>

Currently in C-IV, a user is unable to select the EDBC RE run reason unless the RE packet is marked as 'N/A,' or 'Reviewed – Ready to run EDBC' on the 'Customer Reporting Detail' page. If a user runs EDBC for a month after the RE due month without selecting the RE run reason, C-IV will display a hard validation message when the user clicks 'Accept' on the 'CalFresh EDBC Summary' or 'CalWORKs EDBC Summary' page. This functionality exists to prevent benefits from being erroneously issued after the RE due month.

<u>LRS System:</u>

Currently in LRS, the EDBC RE run reason is automated and is not available for a user to select. If the user attempts to run EDBC for the month immediately following the RE due month, and the RE packet is in 'Reviewed – Ready to run EDBC' status on the 'Customer Reporting Detail' page, LRS will automatically apply the RE run reason, mark the RE packet as 'Complete' and advance the RE period when the user saves the EDBC results. If the user attempts to run EDBC for any other month after the RE due month, LRS will display a hard validation message that prevents the user from running EDBC.

County Action
In general, Counties should not run EDBC on cases that are still active but have a RE due in March, April or May. However, there may be instances in which changes need to be made on the case. Until the project implements CA-214635/C-IV-106787 to move out RE due dates per direction from CDSS, Counties should take the following steps when action needs to be taken on the case, the RE was not completed, and EDBC needs to be run for a month after the RE date.

<u>C-IV Counties:</u>
1. On the 'Barcode Detail' page, scan/enter the RE barcode number to set it as 'Received'.

   If the household did not return the RE packet, open the RE packet from the 'Distributed Documents' page, copy the barcode number from the form, and paste it into the 'Barcode Detail' page. If the RE packet was not sent, but there is a RE record on the 'Customer Reporting Detail' page, then the user would need to manually generate a RE packet (Do not send the RE packet), then enter the barcode number on the 'Barcode Detail' page.

	2. Then, on the 'Customer Reporting Detail' page, update the status of the RE packet to 'Reviewed – Ready to run EDBC'. 3. On the 'CalFresh EDBC Summary' or 'CalWORKs EDBC Summary' page, select the appropriate Benefit Month and Program and 'Run EDBC'. 4. After clicking 'Save and Continue' for the EDBC results, C-IV will advance the RE Due Month. 5. Users with the appropriate security access will need to navigate to the 'Program Detail' page and manually update the RE period out 6 months (Example: REs originally due in April 2020 will need to be changed to be due October 2020). 6. Review, Suppress and/or Manually generate the appropriate NOAs (Example: CF 377.1 CalFresh Approval Notice, etc.). 7. Add a Journal Entry; refer to your county policy for more information. C-IV Job Aids: • Job Aid-Barcoding • Job Aid-CalWORKs and CalFresh Re-Evaluation Process • Job Aid-Forms and NOAs LRS: 1. On the 'Customer Reporting Detail' page, update the status of the RE packet to 'Received'. Click 'Save' and 'Enter'. 2. Then, update the status of the RE packet to 'Reviewed – Ready to run EDBC'. 3. On the 'Run EDBC' page, select the appropriate Program(s), Benefit Begin and End Month. Click 'Run EDBC'. 4. After clicking 'Accept' and 'Save and Continue' for the EDBC results, LRS will advance the RE Due Month. 5. Users with the appropriate security access will need to go to the 'Program Detail' page, click 'Edit', and manually update the RE period out 6 months (Example: REs originally due in April 2020 will need to be changed to be due October 2020). 6. Review, Suppress and/or Manually generate the appropriate NOAs (Example: CF 377.1 CalFresh Approval Notice, etc.). 7. Add a journal entry; refer to your county policy for more information. LRS Job Aids: • JA CalWORKs and CalFresh Re-Evaluation Process
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Attachments:	None
Web Portal Link:	██████████ OR You may also retrieve the CIT document and attachments by following these steps: 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2020" folder. 4. Click on the appropriate CIT # folder.