

Diversion – Process and Issue Benefits

[Purpose](#)

[Adding the Diversion Program to the Case](#)

[Entering Data Collection Information](#)

[Entering Diversion Employment and Income Information](#)

[Running EDBC](#)

[NOAs](#)

[Denying Diversion](#)

[Issuing Diversion Benefits](#)

[Issuance Method](#)

[Creating a Payment Request](#)

[Issuing a Warrant](#)

[Closing the Service Arrangement](#)

[Time Limits and Diversion](#)

Purpose

The purpose of this job aid is to provide instructions on processing a Diversion program and issuing benefits.

Adding the Diversion Program to the Case

The following table provides step-by-step instructions on adding a Diversion program to a case. The following steps assume you are in the context of a case.

Refer to the Job Aids: Reapplications and Rescissions and Re-Evaluation Process for information on repending a Diversion program that already exists for a case.

Step	Action
a)	Place the cursor over Case Info on the Global navigation bar.
b)	Select Case Summary from the Local navigator.
c)	Click the New Program link on the Task navigation bar.
d)	On the Program Detail page: <ol style="list-style-type: none"> Select Diversion from the Select Program drop list. Click the Go button.
e)	On the New/Reapplication Detail page: <ol style="list-style-type: none"> Enter the <Diversion Date of Application> in the Application Date field OR Use the Calendar icon to select a date. Enter the <Beginning Date of Aid> in the Beginning Date of Aid field OR Use the Calendar icon to select a date. Select <Source> from the Source drop list. Click the appropriate check boxes to select the members of the Diversion program.

	e) Click the Save and Return button.
f)	On the Diversion Detail page: a) Click the Add button in the Administrative Roles section.
g)	On the Administrative Role Detail page: a) Select Primary Applicant/Recipient from the Administrative Role drop list. b) Select the < Primary Applicant > from the Name drop list. c) Enter the < Begin Month > in the Begin Month field. OR Use the Calendar icon to select a date. d) Click the Save and Return button.
h)	On the Diversion Detail page: a) Click the Add button in the Administrative Roles section.
i)	On the Administrative Role Detail page: a) Select Payee from the Administrative Role drop list. b) Select Regular from Payee Sub-Type drop list. c) Select the < Payee > from the Name drop list. d) Enter the < Diversion application month > in the Begin Month field. OR Use the Calendar icon to select a date. e) Click the Save and Return button.
j)	On the Diversion Detail page: a) Click the Save and Return button.
k)	Place the cursor over Case Info on the Global navigation bar.
l)	Select Worker Assignment from the Local navigator.
m)	On the Pending Assignment List page: a) Click the Diversion check box. b) Select the Manual Assignment radio button to manually assign the program to a worker. c) Click the Select button.
n)	On the Select Worker page: a) Enter search criteria. b) Click the Search button. c) Confirm the appropriate worker is selected OR Select the radio button for the appropriate worker. d) Click the Select button.
o)	On the Pending Assignment List page: a) Confirm or select < Whether the Program Should Be Reassigned After Approval > from the Automatically Reassign When Activated drop list. b) Click the Assign button.

Entering Data Collection Information

In order to approve a Diversion program, you must enter all necessary data collection information including employment and income records.

An income record for the appropriate type and correct begin date is necessary to approve Diversion. The income category should be Earnings. The type should then be Earnings Anticipated w/Diversion. The begin date of the income is the date of the conditional job offer. This may be the same date as the Diversion BDA.

The income record should also be end dated. This end date depends on County policy and the months for which you want to issue Diversion benefits.

The steps below provide instruction for entering the employment and income information related to Diversion.

You must also enter all other relevant case information.

Entering Diversion Employment and Income Information

Step	Action
1.	Place the cursor over Eligibility on the Global navigation bar.
2.	Select Customer Information from the Local navigator.
3.	Click the Employment link on the Task navigation bar.
4.	On the Employment List page: <ul style="list-style-type: none"> a) Select <Change Reason> from the Change Reason drop list. b) Enter <Reported Date of Change> in the Reported Date field. c) Click the Add button.
5.	On the Employment Detail page: <ul style="list-style-type: none"> a) Select <Name of the Applicant with the Conditional Job Offer> from the Name drop list. b) Select <Category> from the Category drop list. c) Select <Type> from the Type drop list. d) Enter <Employer's Name> in the Employer field. Note: You may use the Select button if the Employer has a record in the RDB according to County policy. e) Enter <Work Address> in the Address field. f) Enter <Job> in the Job Title field. g) Enter <Date of the Job Offer> in the Date Hired field. <p>OR</p> <ul style="list-style-type: none"> Use the Calendar icon to select a date. h) Click the Add button in the Status Information section.
6.	On the Employment Status Detail page: <ul style="list-style-type: none"> a) Select <Change Reason> from the Change Reason drop list. b) Enter <Enter Reported Change Date> in the Reported Date field. c) Select Active from the Status drop list. d) Select Employed from the Status Reason drop list. e) Enter <Hourly Rate of Pay> in the Hourly Wage field. f) Enter <Number of Hours per Week> in the Hours/Week field.

	<p>g) Enter the <Date of the Conditional Job Offer> in the Begin Date field OR Use the Calendar icon to select a date.</p> <p>h) Click the Save and Return button.</p>
7.	<p>On the Employment Detail page:</p> <p>a) Select <Verification Status> from the Verified drop list at the bottom of the page to indicate if the employment information has been verified.</p> <p>b) Click the Save and Return button.</p>
8.	Expand the Financial section of the Task navigation bar by clicking the Financial expand caret.
9.	Click the Income link on the Task navigation bar.
10.	<p>On the Income List page:</p> <p>a) Select Earnings from the Income Category drop list.</p> <p>b) Click the Add button.</p>
11.	<p>On the Income Detail page</p> <p>a) Select <Change Reason> from the Change Reason drop list.</p> <p>b) Enter <Report Change Date> in the Reported Date field.</p> <p>c) Select the <Name of the Applicant with the Conditional Job Offer> from the Name drop list.</p> <p>d) Select Earnings Anticipated w/Diversion from the Type drop list.</p> <p>e) Click the Select button next to the Employment field.</p>
12.	<p>On the Select Employment page:</p> <p>a) Select the radio button for the appropriate employment record.</p> <p>b) Click the Select button.</p>
13.	<p>On the Income Detail page:</p> <p>a) Select the <Anticipated Frequency> from the Frequency drop list.</p> <p>b) Select <Day of the Month> from the 1st Pay Day drop list if displayed.</p> <p>c) Select <Day of the Month> from the 2nd Pay Day drop list if displayed.</p> <p>d) Select Cash/CalFresh in the Display Program drop list.</p> <p>e) Click the Add button.</p>
14.	<p>On the Income Amount Detail page:</p> <p>a) Enter the <Anticipated Earnings per Pay Period> in the Average Calculator Amount field.</p> <p>b) Enter the <Anticipated Receive Date for Earnings> in the Date Received field OR Use the Calendar icon to select a date.</p> <p>c) Click the Calculate button.</p> <p>d) Click the Use button.</p> <p>e) Confirm <Calculated Average Earnings Amount> displays in the Reported Amount section.</p>

	f) Enter the < Diversion BDA > in the Begin Date field OR Use the Calendar icon to select a date. g) Enter the < End Date > in the End Date field if appropriate OR Use the Calendar icon to select a date. h) Select < If Verified > from the Verified drop list to indicate if the income information has been verified. i) Click the Save and Return button.
15.	On the Income Detail page: a) Click the Save and Return button.

Running EDBC

It is important to run EDBC for the Diversion BDA month first.

- When you run EDBC for CalWORKs and Diversion together for the Diversion BDA month, the LRS returns the correct results for both programs.
- When the Diversion program is approved, CalWORKs is denied and the LRS auto-tests for Medi-Cal.
- When the Diversion program is denied, CalWORKs is approved if the case is otherwise eligible.
- If you do not run the CalWORKs and Diversion EDBCs together, you need to take action on the second program separately.

The following steps provide instructions on running EDBCE and assume that you are in the context of a case.

Step	Action
1.	Click the Run EDBC link on the Task navigation bar.
2.	On the Run EDBC page: a) Select the < Diversion BDA Month > from the Begin Month drop list if necessary. b) Click the Diversion check box to select the program. c) Click the CalWORKs check box to select the program. d) Click the Run EDBC button.
3.	On the EDBC List page: a) Click the Diversion hyperlink.
4.	On the Diversion EDBC page: a) Review EDBC results. b) Click the Accept button if the results are correct. c) c) If the results are incorrect, click the Cancel button and review the case information.
5.	On the EDBC List page: a) Click the CalWORKs hyperlink.
6.	On the CalWORKs EDBC Summary page. a) Review EDBC results.

	<ul style="list-style-type: none"> b) The program should be denied with a reason of Accepted Diversion if Diversion is approved. c) Select <Potential CalWORKs Aid Code> from the Potential Aid Code drop list. d) Click the Accept button if the results are correct. e) If the results are incorrect, click the Cancel button and review the case information.
7.	On the EDBC List page: <ul style="list-style-type: none"> a) Click the Medi-Cal hyperlink if displayed.
8.	On the Medi-Cal EDBC Summary page: <ul style="list-style-type: none"> a) Review the EDBC results. b) Click the Accept button.
9.	On the EDBC List page: <ul style="list-style-type: none"> a) Click the Save and Continue button.

NOAs

NOAs are automatically generated when you save the EDBC results. You must review the NOAs before printing and saving them.

Denying Diversion

Diversion may be denied when you run EDBC. You may also use the Negative Action Detail page to deny the program.

Issuing Diversion Benefits

EDBC is used to approve Diversion but not to issue the benefits. Service arrangements are used to issue Diversion benefits. The following table provides step-by-step instructions on adding need and service arrangements and assumes you are in the context of a case.

Adding the Need and Service Arrangement:

Step	Action
1.	Place the cursor over Eligibility on the Global navigation bar.
2.	Select Customer Information from the Local navigator
3.	Click the Needs link on the Task navigation bar.
4.	On the Needs List page: <ul style="list-style-type: none"> a) Click the Add Need button.
5.	On the Need Detail page: <ul style="list-style-type: none"> a) Select the <Diversion Applicant with the Conditional Job Offer> from the Name drop list. b) Select Diversion Services from the Category drop list. c) Select the <Type of Service> from the Type drop list. d) Enter the <Diversion BDA> in the Begin Date field. e) Select Indicated from the Status drop list. <p>Note: A need must have a status of Indicated to be associated with a service arrangement.</p>

	<ul style="list-style-type: none"> f) Select Documented from the Status Reason drop list. g) Select Service Arrangement from the Save & Add New drop list and click the Go button. OR h) Click the Save and Return button if you are not ready to create the service arrangement at this time.
6.	<p>On the Service Arrangement Detail page:</p> <ul style="list-style-type: none"> a) Confirm or select the radio button of the need for which you want to create the service arrangement. b) Enter the <Beginning Date for the Service Arrangement> in the Arrangement Period From field. OR c) Use the Calendar icon to select a date. d) Enter the <Ending Date for the Service Arrangement> in the Arrangement Period To field. OR e) Use the Calendar icon to select a date. f) Confirm Diversion displays on the Program Type field. g) Confirm or select <Correct Aid Code> is selected from the Aid Code drop list. h) Select <Payee> from the Payee drop list. i) Click the Provider Select button if Same as Provider or C/O Customer is selected from the Payee drop list. OR Go to step 6.
7.	<p>On the Select Service and Provider page:</p> <ul style="list-style-type: none"> a) Enter search criteria. b) Click the Search button. c) Confirm or select the radio button for the appropriate Service Provider. d) Click the Select button
8.	<p>On the Service Arrangement Detail page:</p> <ul style="list-style-type: none"> a) Enter <Description of the Service the Customer Is to Receive> in the Service Type Description field. b) Enter <Total to be Issued> in the Total field if appropriate. c) Select <Status of the Service Arrangement> from the Status drop list. d) Select <Reason for the Status> from the Status Reason drop list. e) Enter <Date of the Status> in the Status Date field OR f) Use the Calendar icon to select a date. g) Enter <Any Comments> in the Comments field if appropriate. h) g) Click the Save and Return button.

Issuance Method

If the issuance method is Voucher, the voucher may be issued according to County policy after the service arrangement is saved. Refer to the Job Aid: Valuables – Issue a Valuable for information on issuing a voucher.

Creating a Payment Request

If the issuance method is Warrant, a payment request must be created before the warrant can be issued. The following table provides step-by-step instructions for creating a payment request and assumes 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 the Service Arrangement link on the Task navigation bar.
4.	On the Service Arrangement List page: a) Click the <Need Type> hyperlink.
5.	On the Service Arrangement Detail page: a) Click the Create Payment Request button. Note: The Create Payment Request button only displays if the latest status of the service arrangement is Approved, Closed, or Discontinued.
6.	On the Payment Request Detail page: a) Enter the <Amount of the Warrant> in the Requested Amount field. b) Select the <Diversion BDA Month> from the Service Month drop list. c) Confirm or enter the <Date the Request Was Received> in the Received Date field OR d) Use the Calendar icon to select the date. e) Select <Issuance Method> from the Issuance Method drop list. f) Confirm or select <Mail or Pickup> from the Delivery Method drop list. g) Confirm or select <Manually Issued, Routine, or Rush> from the Immediacy drop list. h) Click the Save button.

Issuing a Warrant

After the payment request is saved, it is ready to be processed according to County procedures to generate the warrant.

Refer to the Job Aid: Payment Requests – Manage for information on approving a Payment Request.

Closing the Service Arrangement

After the service has been provided to the participant, the service arrangement must be closed. Follow County policy regarding closing the service arrangement.

Time Limits and Diversion

The need type selected on the Need Detail page determines which time of the month that the Diversion payment was issued.

When a participant reapplies for CalWORKs during the Diversion period, the LRS counts the Diversion months if a recovery account is created prior to the CalWORKs approval. If a participant opts to repay the Diversion payment, you must manually calculate the overpayment and create an external recovery account before approving the CalWORKs program. If the external recovery account is created after the CalWORKs is approved, you must manually adjust the time limit records. Refer to Job Aid: Time Limit Aid for information about adjusting Time Limit records.