Reapplications and Rescissions

Purpose

The purpose of this job aid is to provide instructions for pending applications / programs and viewing application history in the LRS.

<Program> and <Person> History

To view the history of a program:

Step	Action
1.	Place the cursor over **Eligibility** on the **Global** navigation bar.
2.	Select **Case Summary** from the **Local** navigator.
3.	On the **Case Summary** page: a) Click the **View Details** button in the <**Program**> block.
4.	On the <Program> Detail page, click the View History button.

To view the history of a person:

Step	Action
1.	Place the cursor over **Eligibility** on the **Global** navigation bar.
2.	Select **Case Summary** from the **Local** navigator.
3.	On the **Case Summary** page: a) Click the <**Person Name**> hyperlink in the <**Program**> block.

When viewing the <Program> History page, there are four sections: Application History, Detail History, Re-Evaluation History, and Worker History.

When viewing the <Person> History page, there are three sections: Name, Person Application History, Person Detail History.

Application History

This section shows all applications logged for the person/program. The "App #" represents the order of applications submitted/entered into the LRS and is based on the Application Date.

Detail History

This section displays the status of the person/program over time. The "App #" represents the application that is valid for the time period of that row's status record.

Re-Evaluation History

This section gives the history of redeterminations/recertifications/re-evaluations for the program. For more information on Re-Evaluations, see the Re-Evaluation Process job aid

Worker History

This section gives the history of Worker IDs assigned to the program.

Application Events

When an action is taken on an application, the action is logged in the LRS as an "event" with the correlating reasons and effective date of the event.

To view the events on the Program or Person Application, click the App Date on the <Program> History or <Person> History page. This will take you to the Program History Detail or Person History Detail page, respectively.

Starting Point:

Step	Action
1.	Place the cursor over **Eligibility** on the **Global** navigation bar.
2.	Click **Case Summary** from the **Local** navigator.
3.	On the **Case Summary** page: a) Click the **View Details** button in the **<Program>** section. b) Click the **View History** button on the **<Program> Detail** page. c) Click the <**App Date**> hyperlink on the **<Program> History** page.

Events are not logged for programs that are not managed applications (for example: external programs and auto-generated programs like WTW and GROW). Programs that fall into this category display an application type of "NM" (Non Managed). Cases with this application type does not have a hyperlink on the <Program> History page.

Below is a list of events that are tracked:

- **New Application**

- **Pended** - This event is logged when an application is created. This type has two reasons - New Application or Reapplication.

- **Approved** - This event is logged when the last event on the application was Pended, and the Worker takes an action to approve the application. This type has no associated reason(s).

- **Denied** - This event is logged when the worker takes an action to deny the application. This type lists the denial reason determined by EDBC for EDBC programs. For Child Care, the LRS uses the denial reason the worker provides.

- **Disc'd** - This event is logged when a worker takes an action to discontinue the application. This event can only occur when a program was previously approved. This type lists the associated discontinuance reason as determined by EDBC for EDBC programs. For Child Care, the LRS uses the discontinuance reason the Worker provides.

One Month EDBC

When a one month EDBC is saved to close a pending person or program, the LRS creates a denied/discontinued status record for the remainder of the person's/program's consecutive pending months. The EDBC result is applied to all of the pending months. Users do not have to run EDBC to action remaining pending months unless an active person/program has additional pending months. In this scenario, you receive the following Validation message: [Program] has at least one additional pending month starting in [month]. Please action this month through EDBC.

How to Rescind a Case

If you need to undo a denial or discontinuance of a person and/or program, without logging a new application, then you use the Rescind button on the <Program> Detail page to complete the process.

The Rescind button can only rescind a group of people that share the same event effective date and event type (Denial or Discontinuance) and will not display when there is a pending application for ANY persons in the future.

The Rescind button is available based on the view date of denial/discontinuance for all EDBC programs except General Assistance/General Relief. When clicking the Rescind button, the BDA and application date are automatically populated based on the last valid application. If it is necessary to rescind two different groups of people,

the process below will need to be repeated for each group. Start with the earliest effective date.

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 **Case Summary** from the **Local** navigator.
3.	On the **Case Summary** page: a) Change the <**Display Date**> to the month in which you want to rescind. b) Click the **View** button to refresh the page with the new display date. c) Click the **View Details** button in the **<Program>** block.
4.	On the **<Program> Detail** page: a) Click the **Edit** button. b) Click the **Rescind** button.
5.	On the **Rescind Detail** page: a) Select a **Rescind Reason** from the drop list. b) Confirm the **Comply Date** field when displayed. **Note:** This label displays the date of the compliance that the rescind will apply to. c) In the **Section Effective Date to Rescind page section**, select the radio button next to the date you wish to rescind **Note:** This page section displays a list of denials by date and allows you to rescind one of them by date selection. d) Click the **Save and Return** button.
6.	On the **<Program> Detail** page: a) Click the **Save and Return** button.

Below is a list of Rescind Reasons:

Program	Rescission Reasons
CalWORKs	The options are: • - Select – • 1st Month Ineligible • 2nd Month Ineligible • Appeal • Erroneous Disc/Deny • Good Cause • QR7 • Rescind Disc/Deny • Restoration Aid Waiver • SAR7

	Note: When a CW segment is rescinded during the first month of TCF and the TCF benefits have already been issued, you need to run EDBC for all programs initially for one month only, then run EDBC again for all other months. The run reason for CalFresh should be "Elect Regular" (this run reason only displays on the very first month of TCF). You should not rescind TCF after 5 months. A validation message prevents users from rescinding a TCF program once the RE Due Month has passed.
General Relief	The options are: • - Select – • Erroneous Disc/Deny • Good Cause • QR7 • Admin Decision • Rescind Disc/Deny • Other
Medi-Cal	The options are: • - Select – • 1st Month Ineligible • 2nd Month Ineligible • Appeal • Erroneous Disc/Deny • Good Cause • MC176S • Rescind Disc/Deny
Immediate Need	The options are: • - Select – • 1st Month Ineligible • Appeal • Erroneous Disc/Deny • Good Cause • IN Second Request • Rescind Disc/Deny
CalFresh	The options are: • - Select – • 1st Month Ineligible • 2nd Month Ineligible

	• Appeal
	• Erroneous Disc/Deny
	• Good Cause
	• Verification after 30 days
	• QR7
	• Rescind Disc/Deny
	• Restoration Aid Waiver
	• SAR7
All Other Programs	The options are:
	• - Select –
	• 1st Month Ineligible
	• 2nd Month Ineligible
	• Appeal
	• Erroneous Disc/Deny
	• Good Cause
	• Rescind Disc/Deny

Reapplications

If the reapplication does not require an application to be registered, skip to the table for Reapplications / No Application Registered.

Note: The Reapply button will not display for a denied or discontinued case if there is an approved application for ALL persons in the future, or if there is already a Pending application for all persons.

The following table provides step by step instructions on how to initiate the Clearance task and process a reapplication for a program from a registered application in the LRS.

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select the **Tasks** from the **Local** navigator.
3.	Click the **Worklist** link from the **Task** navigator bar.
4.	On the **Worklist** page: a) Select the appropriate **Clearance** hyperlink.
5.	On the **Task Detail** popup:

	a) Review the information and then click the X in the upper right-hand corner to close the window.
6.	On the **Application Registration Search** page: a) Select the appropriate <**Search Criterion**> from the **Search By** drop list. b) Enter the information into the dynamically populated <**Search Criterion**>field. OR c) Click the Select button next to the dynamically populated <**Search Criterion**> search field.
7.	On the **Select** <**Search Criterion**> page: a) Enter the appropriate search criteria. b) Click the **Search** button. c) Confirm the radio button is selected for the appropriate option and click the **Select** button
8.	On the **Application Registration Search** page: a) Enter < **Date**> in the **Beginning Date** field. b) Complete all other applicable search criteria. c) Click the **Select** button d) Click the <**App Num**> hyperlink.
9.	On the **Application Registration Summary** page: a) Click the **Link to Case** button.
10.	On the **New Person Search** page: a) Confirm < **Last Name**> in the **Last Name** field. b) Confirm < **First Name**> in the **First Name** field. c) Confirm < **Social Security Number**> in the **Social Security Number** field, if known. d) Confirm < **Birth Date**> in the **Date of Birth** field. e) Confirm < **Gender**> from the **Gender** drop list. f) Click the **Search** button.
11.	On the **New Person Search Results** page: a) Confirm the radio button is selected for the correct person. b) Click the **Select** button.
12.	On the **New Person Detail** page: a) Confirm all information is correct. b) Click the **Continue** button under
13.	On the **Previous Case List** page: a) Click the radio button for the case the new application should be linked to. b) Click the **Select** button.
14.	On the **Case Member List** page: a) Click the **Save and Continue** button.
15.	On the **Program Application List** page: a) Click the **Reapply** button next to the program being reapplied for.
16.	On the **New/Reapplication Detail** page: a) Enter < **Application Date**> in the **Application Date** field.

	b) Enter < **Beginning Date of Aid**> in the **Requested BDA** field. c) Select < **Yes** or **No**> from the **Inter-County Transfer** drop list. d) Click the checkbox for each individual reapplying for the program. **Note:** The page defaults to not have any case members selected when it loads. e) Complete all other applicable information. Refer to the table below for a list of fields displayed depending on the program being applied for. f) Click the **Save and Return** button.
17.	On the **Program Application List** page: a) Repeat steps 8 and 9 for each program being applied for. b) Click the **Continue** button.
18.	On the **Application Registration Summary** page: a) Click the **Close** button.

Reapplications – No Application Registered

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 **Case Summary** from the **Local** navigator.
3.	On the **Case Summary** page: a) Change the <**Display Date**> to the month the reapplication takes affect (the BDA month). b) Click the **View** button to refresh the page with the new display date. c) Click the **View Details** button in the **<Program>** section.
4.	On the **<Program> Detail** page: a) Click the **Edit** button. b) Click the **Reapply** button.
5.	On the **New/Reapplication Detail** page: a) Confirm the Primary Applicant correctly displays on the Primary field. **Note**: The Primary field displays the name of the Primary Applicant already existing on the Program. You can update/change the Primary Applicant from the <Program's> **Administrative Role Detail** page. Follow County policy when updating the Program's Primary Applicant. **OR** Select <**Primary Applicant**> from the **Primary** field. b) Enter < **Application Date**> in the **Application Date** field. c) Enter the <**Beginning Date of Aid**> in the **Requested BDA** field. d) Enter the <**Source**> from the **Source** drop list. e) If the reapplication is for Medi-Cal, select <**Requested Type**> from the **Requested Medical Type** drop list.

	f) If available, select <**Yes or No**> from the **Inter-County Transfer** drop list. g) Click the **Name** check box for each person that is applying for aid. **Note**: You can add additional case persons to the program in this step. h) Click the **Save and Return** button.
6.	On the **<Program> Detail** page: a) Click the **Save and Return** button.

The following fields display depending on the program selected.

Page Element	Description
Beginning Date of Aid	You use the Beginning Date of Aid to enter the appropriate begin date for aid.
Inter-County Transfer	This dropdown allows you to select if this is an Inter-County Transfer. Possible Options are: • Yes • No
Have any of the Expedited Services Been Answered	This dropdown allows you to select if the Applicant has answered any of the Expedited Service questions. Possible Options are: • -Select- • Ye • No
Cash-based Medi-Cal BDA	You use the Cash-based Medi-Cal BDA to enter the appropriate begin date for aid.
MFG Informing Notice	The Maximum Family Grant (MFG) Informing Notice section displays for appropriate programs.
Status	**Editing Program Details:** This dropdown allows you to indicate if the Participant signed the informing notice. Options include: • <Blank> • Refused • Signed
Date	You use the Date field to enter the date for the status listed.
RE Status	**Editing Program Details:** This dropdown allows you to indicate if the Participant signed the re-evaluation informing notice.

	Options include:
	<Blank> - Refused - Signed
Date	You use the Date field to enter the RE Date.
Parental Rights	This page section displays the dates that Parental Rights have been terminated for appropriate programs.
Mother's Rights Terminated Date	You use this field to enter the date that the Mother's rights are terminated.
Father's Rights Terminated Date	You use this field to enter the date the Father's rights are terminated.
Requested Medical Type	Possible Options are: <Blank> - DDS HCBS Waiver - Former Foster Care Children - LTC - Manual EDBC - Medi-Cal - Medi-Cal - No Property Information - Medi-Cal - Property Disregard - Medi-Cal In Home Operations Waiver - Medicare Premium Payment Programs - Minor Consent (12-21) FP/MntlHlth - Minor Consent (12-21) FP/STD/D&A - Minor Consent (<12) FP/STD - Minor Consent (<21) Pregnancy
Assign to Medi-Cal Only	Possible Options are: <Blank> - Yes - No

Move the BDA Forward

The LRS allows a BDA to be moved in the future, as long as it does not go past an Active month or overlap a benefit month that belongs to another application. A benefit month belongs to an application when the application is valid for the benefit month.

If the program is Active, you can move the BDA to any subsequent day within the first Active month (usually the month of the original BDA), but not into the next. If

the program is Pending, then the BDA can move forward up until the next application.

Refer to your County policy to determine when the BDA can be moved forward.

Note: For TCF recertification, when the BDA for a person or program is moved forward, a Pending status is created.

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

Step	Action
1.	On the **Case Summary** page: a) Click the **View Details** button.
2.	On the **<Program> Detail** page: a) Click the **Edit** button. b) Click the **Edit** button for the **Application Date** in the **Program Information** page section.
3.	On the **Application Detail** page: a) Select the <**Application You Need to Update**> from the **View Application** drop list. b) Click the **View** button. c) Select < **Appropriate Reason**> from the **Change Reason** drop list. d) Enter < **Correct Application Date**> in the **Application Date** field. e) Enter < **Correct Application Date**> in the **Application Date** field for each program person. f) Enter < **Beginning Date of Aid**> in the **Beginning Date of Aid** field for each program person. **Note**: For TCF recertification, the **Requested BDA** field is non-editable. You need to update the **View Date** field on the **CalFresh Detail** page. g) If applicable, enter the **Cash-based MC Beginning Date of Aid.** h) Click the **Save and Return** button.
4.	On the **<Program >Detail** page: a) Click the **Save and Return** button.

Moving the BDA Backward

The LRS allows a BDA to be moved backwards until the month after the prior BDA, or to the last Active month. Unlike the forward moving, a BDA can never move backwards into an Active month.

Refer to your county's policy to determine when the BDA can be moved backward.

Refer to the steps above for moving the BDA backward.

Note: The ability to edit BDAs is limited to specific groups of Users and changes based on the status of the application.

1st and 2nd Eligible Month

If the Rescind Reason of 1st Month Ineligible (or 2nd Month Ineligible) is selected, the Effective Date moves by one (or two) months from the original (Denial or Discontinuance) Effective Date.

Refer to your county's policy to determine when 1st Month Ineligible or 2nd Month Ineligible should be selected.

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

Step	Action
1.	On the **Case Summary** page: a) Change the <**Display Date**> to the **Beginning Date of Aid** month. b) Click the **View** button to refresh the page with the new display date. c) Click the **View Details** button in the **<Program>** block.
2.	On the **<Program> Detail** page: a) Click the **Edit** button. b) Click the **Rescind** button in the **Program Persons** page section.
3.	On the **Rescind Detail** page: a) Select < **Rescind Reason**> from the **Rescind Reason** drop list. b) Select the radio button for the persons and **Effective Date to Rescind**. c) Click the **Save and Return** button.
4.	On the **<Program> Detail** page: a) Click the **Save and Return** button.

Verifications After 30 Days

If the Rescind Reason of Verifications after 30 days is selected, then you must enter the date the verifications were received. Upon saving the rescission, LRS navigates you to the Application Detail page, where the BDA of the persons defaults to the Verifications Provided Date. After saving this page, the rescission is complete and the BDAs updated.

This reason is only available for the CalFresh program.

Refer to your county's policy to determine when Verifications after 30 days should be selected.

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

Step	Action

1.	Place the cursor over **Eligibility** on the **Global** navigation bar.
2.	Select **Case Summary** from the **Local** navigator.
3.	On the **Case Summary** page: a) Change < **Display Date**> to the Beginning Date of Aid month. b) Click the **View** button to refresh the page with the new display date. c) Click the **View Details** button in the **<Program>** block.
4.	On the **<Program> Detail** page: a) Click the **Edit** button. b) Click the **Rescind** button in the **Program Persons** page section.
5.	On the **Rescind Detail** page: a) Select < **Verifications after 30 days**> from the **Rescind Reason** drop list. b) Select the radio button for the persons and **Effective Date to Rescind**. c) Enter **<Verifications Provided Date>** in the **Verifications Provided Date** filed. d) Click the **Save and Return** button.
6.	On the **Application Detail** page: a) Review the information for accuracy. b) Click the **Save and Return** button.
7.	On the **CalFresh Detail** page: a) Click the **Save and Return** button.

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