

# JOB AID

## CONTINUING PAYMENT FOR NMD TURNING 21 YEARS OF AGE

### Continuing to Pay Benefits for a NMD Turning 21 Years of Age

When you have a NMD turning 21 and the Jurisdiction Termination hearing has not happened, this requires the County to keep paying for the 21-year-old until the hearing is heard and the case is dismissed by the court. **The County will be paying this population under Aid Code 43.**

#### I. Case/Program is Closed and Payment needs to Continue:

When the case is closed the first step is to re-run online EDBC for the month of the NMD's 21<sup>st</sup> birthday and override the issuance amount to the full month's payment  
 Note: Make sure to check to see what the full month payment is because there may be an infant supplement on the case.

To continue ongoing payment, the case/program needs to be rescinded back to the month of discontinuance.

- Steps to Over-Ride Potential Benefit Amount:

Step	Action
1.	On the <b>Foster Care EDBC Summary</b> page: Under the <b>Foster Care Budget</b> section a) Click the <b>&lt;Override Payment&gt;</b> button.
2.	On the <b>Payment Override Detail</b> page a) Select the <b>&lt;Override Reason - Administrative Decision&gt;</b> from the Override Reason dropdown. b) Enter the <b>&lt;Override Amount&gt;</b> in the Override Amount field. <b>Note:</b> Total full month payment (including all supplemental payments) c) Click the <b>&lt;Save and Return&gt;</b> button.
3.	On the <b>Foster Care EDBC Summary</b> page a) Click the <b>&lt;Save and Return&gt;</b> button.
4.	On the <b>Foster Care EDBC List</b> page a) Click the <b>&lt;Save and Continue&gt;</b> button.
5.	A Manual Notification will be mailed to the Client.

- Steps to Rescind a Closed Case:

Step	Action
1.	Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar.
2.	Select <b>Case Summary</b> from the <b>Local</b> navigator.
3.	On the <b>Case Summary</b> page: a) Change the <b>&lt;Display Date&gt;</b> to the date in which you want to rescind. <i>*1<sup>st</sup> day of the month after NMD's 21<sup>st</sup> birthday*</i>

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	<ul style="list-style-type: none"> <li>b) Click the <b>&lt;View&gt;</b> button to refresh the page with the new display date.</li> <li>c) Click the <b>&lt;View Details&gt;</b> button in the <b>&lt;Foster Care&gt;</b> block.</li> </ul>
4.	<p>On the <b>Foster Care Detail</b> page:</p> <ul style="list-style-type: none"> <li>a) Click the <b>&lt;Edit&gt;</b> button.</li> <li>b) Click the <b>&lt;Rescind&gt;</b> button in the program person section on the page.</li> </ul>
5.	<p>On the <b>Rescind Detail</b> page:</p> <ul style="list-style-type: none"> <li>a) Select the <b>&lt;Rescind Reason – Erroneous Disc/Deny&gt;</b> from the drop list.</li> <li>b) In the <b>Select Effective Date to Rescind page section</b>, Confirm or Select the radio button next to the date you wish to rescind. <b>Note:</b> This page section displays a list of denials by date and allows you to rescind one of them by date selection.</li> <li>c) Click the <b>&lt;Save and Return&gt;</b> button.</li> </ul>
6.	<p>On the <b>Foster Care Detail</b> page:</p> <ul style="list-style-type: none"> <li>a) Click the <b>&lt;Save and Return&gt;</b> button.</li> </ul>
7.	<p>On the <b>Case Summary</b> Page:</p> <ul style="list-style-type: none"> <li>a) The Foster Care program is now Pending.</li> </ul>

- **Steps to Create Manual EDBC:**

When you are in the context of a case follow the steps to create a Manual EDBC to issue benefits.

*\*Before you start these steps please write down the full benefit amount and the vendor ID for the placement.*

Step	Action
1.	Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar.
2.	Click the <b>Customer Information</b> link on the <b>Local</b> navigator.
3.	Click the <b>Manual EDBC</b> link on the <b>Task</b> navigation bar.
4.	<p>On the <b>Create Manual EDBC</b> page:</p> <ul style="list-style-type: none"> <li>a) Select the <b>&lt;Benefit Month after the 21<sup>st</sup> birthday&gt;</b> from the <b>Benefit Month</b> drop list. For a multi-month EDBC, this will be the initial month.</li> <li>b) Select or deselect the appropriate Program checkboxes.</li> <li>c) Select the <b>&lt;Reason for the Manual EDBC – COVID-19&gt;</b> from the <b>Manual EDBC Reason</b> drop list.</li> <li>d) Click the <b>Create Manual EDBC</b> button.</li> </ul>
5.	<p>On the <b>EDBC List</b> page:</p> <ul style="list-style-type: none"> <li>a) Click the <b>&lt;Foster Care&gt;</b> hyperlink. <b>Note:</b> Choose the <u>Manual</u> EDBC Source</li> </ul>
6.	<p>On the <b>Foster Care EDBC Manual</b> page:</p> <ul style="list-style-type: none"> <li>a) Click the <b>&lt;Set Program Configuration&gt;</b> button.</li> </ul>
7.	On the <b>Program Configuration List</b> page:

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	<ul style="list-style-type: none"> <li>a) Select or confirm "<b>Active</b>" on the &lt;<b>Program Status</b>&gt; drop list under the User System Configuration Field.</li> <li>b) Under Program Configuration click "<b>Edit</b>" on Member</li> </ul>
8.	<p>On the <b>Program Configuration Detail</b> page:</p> <ul style="list-style-type: none"> <li>a) Select or confirm the &lt;<b>Person's Role - MEM</b>&gt; from the Role drop list.</li> <li>b) Confirm Status Field is "<b>Active</b>".</li> <li>c) Select &lt;<b>Claiming Code – Non Federal</b>&gt; from the Claiming Code drop list.</li> <li>d) Select or confirm &lt;<b>Child Code</b>&gt; from the Adult Child Code drop list.</li> <li>e) Click the &lt;<b>Save and Return</b>&gt; button.</li> </ul>
9.	<p>On the <b>Program Configuration List</b> Page:</p> <ul style="list-style-type: none"> <li>a) Click the &lt;<b>Save and Return</b>&gt; button.</li> </ul>
10.	<p>On the <b>Foster Care EDBC (Manual)</b> page:</p> <ul style="list-style-type: none"> <li>a) Click the &lt;<b>Add</b>&gt; button in the Aid Code Information page section.</li> </ul>
11.	<p>On the <b>Foster Care Aid Code Override Detail</b> page:</p> <ul style="list-style-type: none"> <li>a) Select &lt;<b>Aid Code – 43</b>&gt; from the Aid Code drop list.</li> </ul> <p><b>Note:</b> For Resource Family Home providers, selecting <b>Emergency Approval</b> from the Sub Type Code drop list allows you to differentiate between placements that have been <b>Approved</b> and those with <b>Emergency Approval</b> only.</p> <ul style="list-style-type: none"> <li>b) Enter the &lt;<b>Begin Date</b>&gt; in the Begin Date field. <b>Note:</b> 1<sup>st</sup> of the month of EDBC.</li> <li>c) Select &lt;<b>Rate Structure Option – Non CCR</b>&gt; from the Rate Structure drop list.</li> <li>d) Click &lt;<b>Save and Return</b>&gt; button.</li> </ul>
12.	<p>On the <b>Foster Care EDBC (Manual)</b> page:</p> <ul style="list-style-type: none"> <li>a) Click the &lt;<b>Select</b>&gt; button for the <b>Organization</b> field in the Aid Code Information section.</li> </ul>
13.	<p>On the <b>Select Foster Care Resource</b> page:</p> <ul style="list-style-type: none"> <li>a) Enter the &lt;<b>Name</b>&gt; or &lt;<b>Vendor Number</b>&gt; of the resource in the field.</li> <li>b) Click the &lt;<b>Search</b>&gt; button.</li> </ul>
14.	<p>On the <b>Search Results Summary</b> page:</p> <ul style="list-style-type: none"> <li>a) Select the &lt;<b>Radio</b>&gt; button for the desired resource.</li> <li>b) Click the &lt;<b>Select</b>&gt; button.</li> </ul>
15.	<p>On the <b>Program EDBC (Manual)</b> page:</p> <ul style="list-style-type: none"> <li>a) Enter the &lt;<b>Benefit Amount</b>&gt; Total Full month payment (including all supplemental payments) in the Potential Benefit/Allotment field.</li> <li>b) Enter &lt;<b>Any Benefit that Has Already Been Issued for the Benefit Month</b>&gt; in the Previous Potential Benefit/Allotment field. If the client has already received any benefits in the month.</li> <li>c) Click the &lt;<b>Calculate</b>&gt; button.</li> <li>d) Select the &lt;<b>Delivery Method - Mail</b>&gt; from the Delivery Method drop list.</li> </ul>

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	<ul style="list-style-type: none"> <li>e) Select the &lt;<b>Immediacy of the Payment - Routine</b>&gt; from the Immediacy Indicator drop list.</li> <li>f) Click the &lt;<b>Accept</b>&gt; button.</li> </ul>
16.	On the <b>EDBC List</b> page: <ul style="list-style-type: none"> <li>a) Click the &lt;<b>Save and Continue</b>&gt; button.</li> </ul>
17.	The case is now active and a Manual Notice is required to be sent to the Client.

### II. Case/Program is Still Open and Payment Needs to Continue:

Create Manual EDBC the month after the NMD's 21<sup>st</sup> Birthday to continue paying benefits for the NMD under **Aid Code 43**.

- **Steps to Create Manual EDBC:**

When you are in the context of a case follow the steps to create a Manual EDBC to issue benefits.

Step	Action
1.	Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar.
2.	Click the <b>Customer Information</b> link on the <b>Local</b> navigator.
3.	Click the <b>Manual EDBC</b> link on the <b>Task</b> navigation bar.
4.	On the <b>Create Manual EDBC</b> page: <ul style="list-style-type: none"> <li>a) Select the &lt;<b>Benefit Month after the 21<sup>st</sup> birthday</b>&gt; from the <b>Benefit Month</b> drop list. For a multi-month EDBC, this will be the initial month.</li> <li>b) Select or deselect the appropriate Program checkboxes.</li> <li>c) Select the &lt;<b>Reason for the Manual EDBC - COVID-19</b>&gt; from the <b>Manual EDBC Reason</b> drop list.</li> <li>d) Click the <b>Create Manual EDBC</b> button.</li> </ul>
5.	On the <b>EDBC List</b> page: <ul style="list-style-type: none"> <li>a) Click the &lt;<b>Foster Care</b>&gt; hyperlink. <b>Note:</b> Choose the <u>Manual</u> EDBC Source.</li> </ul>
6.	On the <b>Foster Care EDBC Manual</b> page: <ul style="list-style-type: none"> <li>a) Click the &lt;<b>Set Program Configuration</b>&gt; Button.</li> </ul>
7.	On the <b>Program Configuration List</b> page: <ul style="list-style-type: none"> <li>a) Select or confirm "<b>Active</b>" on the &lt;<b>Program Status</b>&gt; drop list under the User System Configuration Field.</li> <li>b) Under Program Configuration click "<b>Edit</b>" on Member</li> </ul>
8.	On the <b>Program Configuration Detail</b> page: <ul style="list-style-type: none"> <li>a) Select or confirm the &lt;<b>Person's Role - MEM</b>&gt; from the Role drop list.</li> <li>b) Confirm Status Field is "<b>Active</b>".</li> <li>c) Select &lt;<b>Claiming Code - Federal or Non Federal</b>&gt; from the Claiming Code drop list.</li> </ul>

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	<p>d) Select or confirm &lt;<b>Child Code</b>&gt; from the Adult Child Code drop list.</p> <p>e) Click the &lt;<b>Save and Return</b>&gt; button.</p>
9.	<p>On the <b>Program Configuration List</b> Page:</p> <p>a) Click the &lt;<b>Save and Return</b>&gt; button.</p>
10.	<p>On the <b>Foster Care EDBC (Manual)</b> page:</p> <p>a) Click the &lt;<b>Add</b>&gt; button in the Aid Code Information page section.</p>
11.	<p>On the <b>Foster Care Aid Code Override Detail</b> page:</p> <p>a) Select &lt;<b>Aid Code - 43</b>&gt; from the Aid Code drop list.</p> <p><b>Note:</b> For Resource Family Home providers, selecting <b>Emergency Approval</b> from the Sub Type Code drop list allows you to differentiate between placements that have been <b>Approved</b> and those with <b>Emergency Approval</b> only.</p> <p>b) Enter the &lt;<b>Begin Date</b>&gt; in the Begin Date field. <b>Note:</b> 1<sup>st</sup> of the month of EDBC.</p> <p>c) Select &lt;<b>Rate Structure Option - Non CCR</b>&gt; from the Rate Structure drop list.</p> <p>d) Click &lt;<b>Save and Return</b>&gt; button.</p>
12.	<p>On the <b>Foster Care EDBC (Manual)</b> page:</p> <p>a) Click the &lt;<b>Select</b>&gt; button for the <b>Organization</b> field in the Aid Code Information section.</p>
13.	<p>On the <b>Select Foster Care Resource</b> page:</p> <p>a) Enter the &lt;<b>Name</b>&gt; or &lt;<b>Vendor Number</b>&gt; of the resource in the field.</p> <p>b) Click the &lt;<b>Search</b>&gt; button.</p>
14.	<p>On the <b>Search Results Summary</b> page:</p> <p>a) Select the &lt;<b>Radio</b>&gt; button for the desired resource.</p> <p>b) Click the &lt;<b>Select</b>&gt; button.</p>
15.	<p>On the <b>Program EDBC (Manual)</b> page:</p> <p>a) Enter the &lt;<b>Benefit Amount</b>&gt; Total Full month payment (including all supplemental payments) in the Potential Benefit/Allotment field.</p> <p>b) Enter &lt;<b>Any Benefit that Has Already Been Issued for the Benefit Month</b>&gt; in the Previous Potential Benefit/Allotment field. If the client has already received any benefits in the month.</p> <p>c) Click the &lt;<b>Calculate</b>&gt; button.</p> <p>d) Select the &lt;<b>Delivery Method - Mail</b>&gt; from the Delivery Method drop list.</p> <p>e) Select the &lt;<b>Immediacy of the Payment - Routine</b>&gt; from the Immediacy Indicator drop list.</p> <p>f) Click the &lt;<b>Accept</b>&gt; button.</p>
16.	<p>On the <b>EDBC List</b> page:</p> <p>a) Click the &lt;<b>Save and Continue</b>&gt; button.</p>
17.	<p>The case is now active and a Manual Notice is required to be sent to the Client.</p>

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### III. Associating a Flag to a Case:

The following steps assume you are in the context of the case that the case flag is being associated to.

Step	Action
1.	Place the cursor over <b>Case Info</b> on the <b>Global</b> navigation bar.
2.	Select <b>Case Summary</b> from the <b>Local</b> navigator.
3.	Click the <b>Case Flag</b>  link on the <b>Task</b> navigation bar.
4.	On the <b>Case Flag List</b> page: a) Click the <b>Add</b> button.
5.	On the <b>Case Flag Detail</b> page: a) Click the <b>Select</b> button under <b>Title</b> .
6.	On the <b>Select Flag</b> page: a) Click the radio button for the appropriate flag < <b>CWS COVID-19 Over 21</b> >. b) Click the <b>Select</b> button.
7.	On the <b>Case Flag Detail</b> page: a) Select < <b>Person(s)</b> > from the <b>Person</b> multi-select list. b) Enter < <b>Begin Date of the Case Flag – Date Manual EDBC starts</b> > in the <b>Begin Date</b> field. c) Enter < <b>End Date of the Case Flag</b> > in the <b>End Date</b> field, if applicable. d) Enter < <b>Notes</b> > in the <b>Notes</b> field, if applicable. e) Click the < <b>Save</b> > button.

### IV: Journal Entry:

The following steps instruct the user how to add a **Journal Entry** when in the context of a case.

Step	Action
1.	Click the < <b>Journal</b> > link on the <b>Utilities</b> navigation bar.
2.	On the < <b>Journal Search</b> > page Under Search Results Summary: a) Select < <b>Template</b> > from the drop list and choose " <b>Classic</b> ". b) Click the < <b>Add Entry</b> > button.
3.	On the Journal Detail Page Under Entry Information: a) Select from < <b>Journal Category Drop List – Eligibility</b> >. b) Select from < <b>Journal Type Drop List – Program Status Update</b> >. c) Select from < <b>Method of Contact Drop List – Written</b> >. d) Under < <b>Short Description – Applying work around to keep case open past 21 due to no Jurisdiction Terminated date</b> >.

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	<p>e) Under &lt;<b>Long Description – Rescinding case to continue payment until Jurisdiction Terminated date is received. Added manual EDBC for the month after 21<sup>st</sup> birthday to continue payment until Jurisdiction Terminated date is received</b>&gt;.</p> <p>f) Click &lt;<b>Save</b>&gt;.</p>
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#### V. Multi-Month Manual EDBC:

**Note:** These steps are only necessary if multiple month's need to be run due to the high date being several months in the future.

The LRS supports multi-month processing for Manual EDBC's; you are not required to manually create each individual budget. Also, you can create Manual EDBC's for multiple months (up to six months) by copying one budget.

**Note:** Multi-month Manual EDBC is available for DCFS and DPSS programs for which Manual EDBC is currently possible. The exception to this is Diversion, Immediate Need, and Homeless programs. The LRS does not allow multi month manual EDBC's for these program types to be replicated.

The list of manual EDBC programs and whether they can be replicated is shown in the table below.

Manual EDBC Program	Replication Allowed
AAP	Yes
CAPI	Yes
CalWORKs	Yes
Diversion	No
Foster Care	Yes
CalFresh (including TCF)	Yes
General Assistance / General Relief	Yes
Homeless - Perm	No
Homeless - Temp	No
Immediate Need	No
Kin-GAP	Yes
Medi-Cal	Yes
RCA	Yes

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- **Automatic Run Reason:**

When creating Multi-Month Manual EDBC's, LRS makes the following determinations:

- If the original/created Manual EDBC month has an EDBC Run Reason, the reason is not to be copied over into the following copied months.
- If the original/created Manual EDBC month does not have an EDBC Run Reason but the RE/Periodic Reporting Due month falls into one of the month copies, the EDBC Run Reason logic is applied and the applicable (copied) Manual EDBC are updated, if appropriate, with the corresponding EDBC Run Reason.

Refer to the "**Manual EDBC - Automatic Run Reasons**" section of this job aid for more information on the EDBC Run Reason logic.

- **Process Multi-Month Manual EDBC:**

The following table provides step-by-step instructions and assumes you are in the context of a case and have created and accepted a one month Manual EDBC for one of the programs listed above where replication is marked as Yes.

If there exists a program and program person with Active statuses, replication is allowed for months prior to conversion.

As per current system design, manual EDBC cannot be run for months prior to the program application date. The same is applicable even for running the multi-month manual EDBC's.

**Note:** The functionality below is only available after the one-month EDBC is accepted.

Step	Action
1.	<p>On the <b>EDBC List</b> page:</p> <ul style="list-style-type: none"> <li>a) Select &lt; <b>Yes</b>&gt; from the <b>Do you want to replicate the EDBC for multiple months (Select Yes/No to proceed)</b> drop list.</li> <li>b) Confirm the <b>Begin Month</b>  <b>Note:</b> The Begin Month will be the month after the budget just created and accepted. If incorrect, you must recreate the correct Manual EDBC benefit month. For example: If the Manual EDBC was created and accepted for March, then the Begin Month will be April.  <b>Note:</b> If No is selected from the drop list, the Save and Continue button will be available for selection.</li> <li>c) Select &lt; <b>MM/YYYY</b>&gt; from the <b>End Month</b> drop list.            Note: You can select a maximum of five (5) additional months. But if the initial budget is in the Come-Up Month, then no option will display in the End Month drop list.</li> </ul>

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	d) Click the <b>Multi Month EDBC</b> button.
2.	EDBC budgets for the selected time period (copied budgets from the Accepted one-month EDBC) are listed in the <b>EDBC List</b> page.

All generated multi-month EDBC's will be in Not Accepted status. You will be required to manually accept all the EDBC's.

### Notes for Multi Month EDBC

- Begin (Begin date is system determined. User cannot change it.) / End dates cannot be past the come-up month.
- The Begin Date defaults to the month following the initial Accepted one month manual EDBC. This cannot be altered by the User.
- User can select the End Date to 1) the Come-Up Month or 2) the initial month plus five months, whichever is earlier.

**Example:** Conversion month was February 2016, however, due to a policy change, a Manual EDBC needs to be completed for December 2015 and February 2016. December discontinued 12/31/2015 due to missed verifications (HH is ineligible). As of February 1st, participant re-applied for benefits and program was approved.

In this scenario, a separate one-month Manual EDBC should be created and authorized for 12/15. Another one-month Manual EDBC should be created for 02/16, accepted, and then run multi-month starting 03/16 and onwards. Follow County policy when determining when to run multi-month EDBC and for which months.

### Reviewing and Accepting Copied Multi-Month Budgets

Each budget will have to be accepted separately. Reviewing EDBC's separately provides you the opportunity to update the EDBC program information and budget. If there is no change, then you can click on the calculate button, accept the budget, and the same benefit amount entered in the initial manual EDBC will be issued. If certain changes are needed, the full process for accepting a replicated EDBC may include the following:

- **Adjustment to Program and/or Budget:** Make any adjustments for each month that differs from the original (initial month)
- **Over Issuance:** Add any Over Issuance adjustment amounts by selecting the appropriate Recovery Account and defining the adjustment amount

**Note:** Over Issuance adjustment amount (if it exists) is not copied over from the initial EDBC. This is to ensure the correct Recovery Account is used and that the user does not unintentionally overdraw the recovery account. If there is an overpayment, you must associate any overpayment to the appropriate Recovery Account upon accepting the EDBC.

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- **Changes to Grant Amount:** If there are any changes that would impact grant amount, select the Calculate button to update the Authorized Amount and the Over Issuance. This calculation includes the Over Issuance Adjustment Amount.

**Note:** If there are changes to values that impact the grant amount, a validation will prevent you from accepting the EDBC until you have first completed this calculation step.

After all changes are made and all months are accepted, click the Save and Continue button.

#### **Manual NOA**

The LRS does not automatically generate a NOA for a manual EDBC nor does a task get created to notify user to create a NOA; you must manually generate the NOA (refer to JA 057 Template Repository). No tasks will get created.

#### **Online vs Manual**

A manual EDBC may be run for some programs that are also supported by online EDBC. Refer to your County policy for when to run a manual EDBC.

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