



[CA-213719] ACL 19-76: Batch EDBC Run to Apply 2021 Earned Income Disregard and Reevaluate IRT Tier 2

Issue Type:	SCR	Team Responsible:	Eligibility	Assignee:	Praveen Badabhagni
Fix Version/s:	[21.03]	Designer Contact:	Thomas Lazio	Change Type (SCR):	New Policy
Minor Version:	21.05.08	Expedite Changes:	Production Deployment	Estimate:	430
Reporter:	Jason M. Francis	Regulation Reference:	ACL 19-76	Created:	02/19/2020 04:08 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Binh Tran	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Funding Source ID:	EID		
Other Agency Cross Reference:	CIV-106463				

Current Design: SCR CA-212912 updated the CalWORKs Earned Income Disregard to \$550 (per ACL 19-76) and also updated the Tier 2 IRT based on the Assistance Unit Size rather than the Family Unit Size (per CRPC 2225).

Request: CalWORKs benefits must be updated based on the new Earned Income Disregard. A SAR 7 with an updated Income Reporting Threshold must be generated and sent.

Recommendation:

1. Run batch EDBC for the benefit month of 06/2021 for all open programs (except Medi-Cal) on cases with an active or ineligible CalWORKs or RCA program in targeted program mode (including CF and SNB on targeted cases) that meet either of the following conditions:
 - a) Has an active person that has income effective for 06/2021.
 - b) Has an active 'FRI' or 'FSO' member in the program for the benefit month of 06/2021.
 - c) Exclude the following programs:
 - i) The benefit month is past the latest RE due date for the program.
 - ii) The program has a SAR7 Due Month of 05/2021 and the report status is Sent, Received, or Incomplete
 - iii) An EDBC has already been processed for the 06/2021 benefit month since the implementation of SCR CA-212912 / CIV-106461.

d) Run EDBC for the population in 1a) and not in 1b) with Run Reason 'CW EID Update' (CT744-XX) and Sub Type code 'CW EID Update' (CT942-XX). Batch EDBC will insert the following Journal entry:
 Short Description: Batch EDBC ran for <month, year>
 Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: CW EID Update

Note: New CTCR will be needed for adding Run Reason 'CW EID Update' (CT744-XX) and Sub Type code 'CW EID Update' (CT942-XX).

e) Run EDBC for the population in 1b) with Run Reason 'CW IRT Update' (CT744-IR) and Sub Type code 'CW IRT Update' (CT942-C4). Batch EDBC will insert the following Journal entry:
 Short Description: Batch EDBC ran for <month, year>
 Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: CW IRT Update

2) Run the DCR to update the SAR 2 Effective month as high dated EDBC month i.e. June 2021 (in SYS_TRANSACT table) to populate the latest IRT limit on SAR 2 form for the cases run through this batch run.

3) Generate the following lists from the batch EDBC process. Each of the lists will include the Standard List Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name

Worker ID

a) List of cases discontinued by the batch EDBC process. The case listing will be named "List of Cases Discontinued by Batch EDBC Process".

Note: Include additional columns to indicate program type and program closure reason

b) List of cases where the batch EDBC process closed a person. The case listing will be named "List of Cases Where Batch EDBC Process Closed a Person".

Note: Include additional columns to indicate program type

c) List of cases where the CW EDBC resulted in a benefit reduction. The case listing will be named "List of CW Cases that Resulted in Benefit Reduction".

Note: Include additional columns to indicate each of the benefit reduction type reasons in separate columns (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change, Benefit Month)

d) List of cases which resulted in a read-only EDBC. The case listing will be named "List of Cases That Resulted in Read-Only EDBC".

Note: Include additional columns to indicate program type and read-only reason

e) List of cases skipped in the batch run. The case listing will be named "List of Cases Skipped in Batch Run".

Note: Include additional columns to indicate the skip reason and program type.

4) Batch Operations:

a. Run the DCR for recommendation 1a to insert records into SYS_TRANSACT for targeted programs on the case for the month of 06/2021.

b. Run the DCR for recommendation 1b to insert records into SYS_TRANSACT for targeted programs on the case for the month of 06/2021.

c. Run batch EDBC.

d. Run the DCR for recommendation 2.

Outreach

Description:

Lists of affected cases will be posted to the CalSAWS Web Portal in the following location:
CalSAWS Web Portal>System Changes> SCR and SIR Lists > 2021 > SCR CA-213719

Operational Impact: