CalSAWS CalSAWS Consortium, CalSAWS System

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Memorandum	CalSAWS Project	
	Regulations:	**ACL 21-55**
	Meeting:	**June 09, 2021**
To:	PPOCs, RPMs, Committee Members	
From:	CalSAWS Project	
Attendees:	PPOCs, RPMs, Committee Members, CalSAWS Project	

Memorandum Purpose:
This memorandum is intended to convey the batch EDBC scope for SCR CA-228338/CIV-108983 Batch EDBC for Cost of Living Adjustment (COLA) for Income In-Kind (IIK) for 2021-2022, county actions and schedule for the referenced program changes.

Scope:

Per All County Letter (ACL) 21-55, policy will be implemented in C-IV through SCR CIV-108979 and in CalSAWS through SCR CA-228323 as part of the 21.06.10 release on 06/10/2021.

To minimize the work required by the counties, the project will take the following actions:

1. **Batch:**
   a. Run a Batch EDBC in Targeted program mode, for all cases with CalWORKs and RCA programs with an active or ineligible program person who has an income record of type 'Income In-Kind', effective for 07/2021. The Targeted program mode will process EDBCs for CW, RCA, CF, NB, IN, and DV programs from the identified cases which includes all the CW/CF(including NB) combo cases.
   Note: Because EDBC applies the lower of the standard amount and the Amount Provided, both populations are included.
   Exclude the following cases:
       i) The benefit month is past the latest RE due date for the program.
       ii) The program has a SAR7 Due Month of 06/2021 and the report status is Sent, Received, or Incomplete
       iii) CW/RCA EDBC has already been processed for the benefit month since SCR CA-228323/CIV-108979 went to production.

   b. CalSAWS only: Run the above population with run reason ''In-kind Income COLA'.

2. **NOAs:**
   All notices will be sent to the Central Printing facility the night of the batch EDBC process.

3. **Journal:**
   CalSAWS: A journal entry will be created for each program run by the batch EDBC process. This will be the standard journal entry added by the batch EDBC process.
       Journal Category: Eligibility

Journal Type: Batch EDBC
Short Description: Batch EDBC ran for [MONTH/YEAR].
Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the [Program Type] program for the following reasons: In-kind Income COLA Update

CIV: Create a DCR to insert a journal with the following information for each case processed through the one-time batch process. There will be only one journal per case, per benefit month successfully processed.
Journal Category: Eligibility
Journal Type: Batch EDBC
Short Description: Batch EDBC ran for [MONTH/YEAR].
Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the [Program Type] program for the following reasons: In-kind Income COLA Update

List Details:
The project will post the following lists to the web portal in the following location:
CalACES Web Portal > System Changes > SCR and SIR Lists > 2021
   i. The lists will be posted for C-IV cases to the 'SCR CIV-108983 folder.
   ii. The lists will be posted for CalSAWS cases to the 'SCR CA-228338 folder.

List	County Action
2.a. Cases where a program was discontinued by the batch EDBC process. Include additional columns to indicate program type and program closure reason	These are likely the result of household changes or ongoing data collection which were not yet processed through EDBC. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.
2.b. Cases where the batch EDBC process closed a person on a program. Include an additional column to indicate program type	These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC. Since the purpose of this Batch EDBC process was not to close persons, review these cases to verify the closure was accurate.
2.c. Cases where the batch EDBC process resulted in CalWORKs benefit reduction. Include additional columns to indicate each of the benefit reduction type in a separate column (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)	These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC. Since the purpose of this Batch EDBC process was not to reduce benefits, review these cases to verify the benefit reduction was accurate.

List	County Action
2.d. Cases where the batch EDBC process resulted in a Read-Only EDBC on a program. Include additional columns to indicate program type and read-only reason	Since Batch EDBC couldn't automatically apply the intended change to these cases, users may process EDBC to apply intended changes, if applicable.
2.e. Cases that were skipped through the batch EDBC process. Include additional columns to indicate the program type and skip reason.	Since Batch EDBC couldn't automatically apply the intended change to these cases, users may process EDBC to apply intended changes if applicable. **Reminder**: When run EDBC on these cases, remember to run for **both** CalWORKs and CalFresh.

2.f. Cases that meet all the following criteria:
   i) Has an active CW program person for benefit month of June 2021 with an MMO and role reason 'Optional Child - Receives Child Support'
   ii) That same program person has an active status and role of MEM for the benefit month of July 2021
   iii) Latest accepted and saved CW EDBC for the July benefit month has a source of 'Batch EDBC Rules'
   iv) None of the following conditions exist:
      1) RE or SAR period ended in June 2021
      2) Program person has a Customer Option of type 'Optional Child - Receives Child Support' with an end-date in June 2021
	The July 2021 IIK COLA Batch EDBC process added some opted-out children back into the assistance unit mid-period. Review these cases and take corrective action. Follow instructions provided in CIT 0029-19.

List	County Action

2.g. Cases where CW or RCA programs that meets all the following criteria:
 	
  i) An active or ineligible program person for the 07/2021 benefit month
 	
  ii) That person has an income record of type 'Income In-Kind'
 	
  iii) That income has a begin date prior to 07/01/2021
 	
  iv) That income has an end date on or after 07/01/2021, or no end-date
 	
  v) That income Amount Provided field is set to 'Yes'
 	
  vi) That income has a Reported Amount that matches the 2020 - 2021 IIK table lookup:
 	
    1) The household size is determined by the 'MAP Family Unit Size' from the latest saved EDBC, effective for the 07/2021 benefit month
	Review the cases and determine if the amount record(s) should be updated to the 2021-2022 chart level or another amount.

Development Schedule
1. Review the batch process schedule with counties on 06/09/2021.
2. Deliver the driving query and list queries to the System Test team on 06/11/2021.
3. System Testing will occur between 06/11/2021 and 06/19/2021.
4. Run batch EDBC in production for both systems on 06/19/2021.

Things to remember about these batch EDBC processes:
- All impacts from SIRs and SCRs which have not been implemented will continue to occur during the batch processing.
- There are multiple reasons why a program may not be successfully run through batch EDBC processing. Some examples include: No Worker Assigned, Overridden Program Case, and Pending Program/Person/Application. Please review tasks and the Batch Eligibility Report daily.
- The EDBCs will have an EDBC Source of 'Batch EDBC Rules'.
- When a user runs EDBC in which a prior pending month exists, the EDBC will have a type of Read-Only. When running Batch EDBC that restriction does not apply and these EDBCs will not be Read-Only.
- Any updates or lack of updates made/not made to cases will impact the batch EDBC results. This means programs may be discontinued (due to non-compliances, etc.) unexpectedly.
- All notices will be generated normally.

County Action:
- Review cases included in the lists and take necessary action.
- Review the Batch Eligibility Report and action cases which could not be processed. This report is an on-request report available under Global: Reports > Local: On Request >

Task: Administrative. If you do not see this report, please contact your Security Administrator for rights. To see cases not processed select a status of 'Not Processed' on the Reports Parameters pages

Schedule Considerations:
- Both systems will not be down during batch processing on Saturday, June 19, 2021
- Batch jobs scheduled for each evening will run after the batch EDBC process completes.
- Approximately 1000 active programs will be processed in C-IV for the benefit month of 07/2021.
- Approximately 700 active programs will be processed in CalSAWS for the benefit month of 07/2021.
- Approximately 50,000 programs processed per hour via batch EDBC.
- The System cannot run batch EDBC processing during the following:
  - Main Payroll
  - Foster Care Main Payroll
  - SAR7 Discontinuance
  - RE Discontinuance
  - 10-day Discontinuance
  - CalFresh Recertification Discontinuance
  - Primary Period of Maintenance (PPM) [C-IV Only]
    - 6:30 AM – 9:00 PM, Monday through Saturday

Timeline:
- Expected CIV Batch EDBC processing: 06/19/2021.
- Expected CalSAWS Batch EDBC processing: 06/19/2021.

CalSAWS **CalSAWS Consortium, CalSAWS System**

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■ = C-IV Batch Process
■ = CalACES South Batch Process

June 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 SAR7 Discontinuance	2 SAR7 Discontinuance	3	4 CF/CW RE Appointment 1	5 CF/CW RE Appointment 2
6	7	8	9	10	11	12 NA 960X NA 960X
13	14	15 CW/CF RE Packets CW/CF RE Packets	16	17 Ten-Day Discontinuance/NA RE X	18	19 **IIK COLA CIV Batch run** **IIK COLA CalSAWS Batch run** Ten-Day Discontinuance
20	21	22	23	24 Send SAR7/SAR2	25 Main Payroll / Send Sar 7 Main Payroll	26
27	28	29	30 CW/CF Disc CW/CF Disc			