

## Memorandum

# CalSAWS Project

Regulations: ACL 22-60, ACL 22-53, ACIN-I-XX-22

Meeting: N/A

To: PPOCs, RMs, Committee Members

From: CalSAWS Project

Audience: PPOCs, RMs, Committee Members, CalSAWS Project

### Memorandum Purpose:

This memorandum is intended to convey the batch EDBC scope, county actions and schedule for the referenced program changes.

### Scope:

Per ACL 22-53, SCRs CA-239411 will implement the CalWORKs Tier 1 and Tier 2 IRT increase on 09/08/2022.

Per ACL 22-60, SCRs CA-239411 will implement the CalWORKs MAP increase on 09/08/2022.

Per ACIN I-XX-22 and Nutrition Service SNAP COLA Memo FY 2023, SCRs CA-239411 will implement the CalFresh COLA on 09/08/2022.

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

### CalWORKs MAP, Tier1 and Tier 2 IRT, CalFresh COLA Batch EDBC Processing on 09/10/2022:

#### 1. Batch:

- a. Run batch EDBC on 9/10/2022 for the benefit month of 10/2022 for:
  - i. All cases with an active or ineligible Foster Care program with ARC aid codes 2T, 2S, or 2U effective for 10/2022 in single program mode.  
Exclude the following cases:
    1. EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month.
    2. EDBC will not run if a regular EDBC has already been processed for the benefit month since SCR CA-239411 went into production.
  - ii. In CalSAWS: run the above population with Run Reason 'CW/CF COLA' (CT744\_CF).
  - iii. In CalSAWS: run the above population with Sub Type code 'CW/CF COLA' (CT942\_C1)
- b. Run batch EDBC on 9/10/2022 for the benefit month of 10/2022 for:

- i. All cases with an active or ineligible CalWORKs or RCA program in targeted program mode. Targeting program mode will include CF and NB programs on the CW/CF combo cases.  
Exclude the following cases:
  - 1. The benefit month is past the latest RE due date for the program.
  - 2. The program has a SAR7 Due Month of 09/2022 and the report status is Sent, Received, or Incomplete.
  - 3. A regular EDBC has already been processed for the benefit month since SCR CA-239411 went to production.
- ii. In CalSAWS: run the above population with Run Reason 'CW/CF COLA' (CT744\_CF).
- iii. In CalSAWS: run the above population with Sub Type code 'CW/CF COLA' (CT942\_C1)

NOTE: Batch shall process recommendation b. only after the completion of recommendation a. This is to ensure that active Foster Care programs are accurately updated prior to the processing of CalFresh program.

- c. Run batch EDBC on 9/10/2022 for the benefit month of 10/2022 for:
  - i. All active or ineligible CF (including TCF) programs in targeted program mode and include NB program.  
Exclude the following cases:
    - 1. The benefit month is past the latest RE due date for the program.
    - 2. The program has a SAR7 Due Month of 09/2022 and the report status is Sent, Received, or Incomplete.
    - 3. EDBC has already been processed for the benefit month since SCR CA-239411 went to production.
  - ii. In CalSAWS: Run the above population with run reason 'CF COLA' (CT744\_FS).
  - iii. In CalSAWS: Run the above population with Sub Type code 'CF COLA' (CT942\_C3).

NOTE: Batch shall process recommendation c. only after the completion of recommendation b. This is to ensure that an active CalFresh program with household members active on a different CalWORKs case gets processed accurately.

## 2. NOAs:

In CalSAWS: DCR will update the SAR 2 Effective month as high dated EDBC month i.e. October 2022 (in SYS\_TRANSACT table) to populate the latest IRT limit in SAR 2 form for the cases run with 'CW/CF COLA' or 'CF COLA' run reason.

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

3. **Journal:**

In 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. The long description will read:

- a. Foster Care EDBC run with Sub Type code 'CW/CF COLA':  
"Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: 'CW/CF COLA'"
- b. CalWORKs and CalFresh EDBC run with Sub Type code 'CW/CF COLA':  
"Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: 'CW/CF COLA'"
- c. CalFresh EDBC run with Sub Type code 'CF COLA':  
"Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: 'CF COLA'"

4. **List Details:**

The project will post the following lists to the web portal in the following location:  
CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2022 > SCR CA-242906

<u>List</u>	<u>County Action</u>
a. List of Cases Discontinued by Batch EDBC Process.  Include additional columns to indicate program type and program closure reason	These cases 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 discontinue households, review these cases to verify the closure was accurate.
b. List of Cases Where Batch EDBC Process Closed a Person.  Include an additional column to indicate program type	These cases 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.
c. List of CW Cases that Resulted in a Benefit Reduction.  Include additional columns to indicate each benefit reduction type in a separate column (Household/ AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)	These cases 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
<p>d. List of Cases That Resulted in Read-Only EDBC</p> <p>Include additional columns to indicate program type and read-only reason</p>	<p>Since Batch EDBC couldn't automatically apply the intended change to these cases, users may process EDBC to apply intended changes, if applicable.</p>
<p>e. List of Cases Skipped in Batch Run.</p> <p>Include additional columns to indicate the program type and skip reason.</p>	<p>Since Batch EDBC couldn't automatically apply the intended change to these cases, users may process EDBC to apply intended changes if applicable.</p> <p><b>Reminder:</b> When processing EDBC on these cases, remember to run for <b>both</b> CalWORKs and CalFresh.</p>
<p>f. List of Cases where an Optional Child was Added Back into the Household by Batch EDBC. Cases that meet all the following criteria:</p> <ul style="list-style-type: none"> <li>i. Has an active CW program person for benefit month of 09/2022 with an MMO role and role reason 'Optional Child - Receives Child Support'</li> <li>ii. That same program person has an active status and role of MEM for the benefit month of 10/2022</li> <li>iii. Latest accepted and saved CW EDBC for the October benefit month has a source of 'Batch EDBC Rules'</li> <li>iv. None of the following conditions exist: <ul style="list-style-type: none"> <li>1. RE or SAR period ended in 09/2022</li> <li>2. Program person has a Customer Option of type 'Optional Child - Receives Child Support' with an end date in 09/2022</li> </ul> </li> </ul>	<p>The October CW COLA Batch EDBC process may have added previously opted-out children back into the assistance unit mid-period. Review these cases and take corrective action, if necessary. County staff may reference instructions provided in CIT 0029-19.</p>

<u>List</u>	<u>County Action</u>
<p>g. List of Cases Discontinued Or Denied for Over Income Prior to COLA Increase. Cases that meet the following criteria:</p> <p>i. EDBC run between 8/22/2022 and prior to deployment of CTCR SCR CA-239411 for the benefit month of 10/2022 has a denial or discontinuance reason of "Over Income" or "Over Income-\$0 Allotment".</p> <p>Include additional columns to indicate program type and program status reason</p>	<p>The October benefit month may have been ran prior to COLA increases being added into Production. Review these cases and take corrective action, if necessary.</p>
<p>h. List of CW and/or CF cases that meet the following criteria. The case listing will be named 'List of Cases with at least one overridden EDBC for COLA Months'</p> <p>i. There is at least one overridden EDBC effective for the current or the Prior Benefit month</p> <p>ii. Batch EDBC is run for the COLA Month (10/2022)</p> <p>iii. Program is CalFresh, CalWORKs, RCA or Nutritional Benefit</p> <p>Note: Include additional column to indicate program type. The case information will display only once on the list even if more than one month may be impacted.</p>	<p>Review these cases and take corrective action, including manually generating the appropriate NOA, as appropriate.</p>

NOTE: For list a, d, and e, a separate list for FC programs will be included as part of recommendation 1a.

### Development Schedule

1. Deliver the FC/CW/CF driving query and list queries to the System Test team on 08/26/2022.
2. System Testing of the FC/CW/CF batch process will occur between 08/26/2022 and 09/09/2022.
3. Run FC/CW/CF batch EDBC in production for both systems on 09/10/2022.

**Things to remember about these batch EDBC processes:**

- All impacts from Defects 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 on a case where 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.

**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:**

- CalSAWS will not be down during batch processing on Saturday, September 10, 2022
- Batch jobs scheduled for each evening will run after the batch EDBC process completes.
- Approximately 1.7 million active programs will be processed during the FC/CW/CF batch EDBC process in CalSAWS for the benefit months of 10/2022.
- 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 FC/CW/CF Batch EDBC processing: 09/10/2022.

■ = CalSAWS Batch Process

## September 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 SAR 7 Discontinuous	2	3
4	5	6 CW/CF RE appt Day 1(county 19)	7 CW/CF RE appt Day 2(county 19)	8	9	10 EC/CW/CF COLA Batch run TNB - 4
11	12 NA 960X	13 Non Magi Redeter(MC 210), Magi Redeter(MC 216), Mixed Redeter(MC 217)	14	15 CW/CF RE Packets	16	17
18	19 10-Day Cutoff	20	21	22 Main Payroll (C-IV Counties)	23 Main Payroll (county 19)	24 Send SAR7 Main Payroll (C-IV Counties)
25	26	27	28	29	30 CW/CF Redetermination	