# Cal**SAWS**

accenture

## Cal**SAWS** | **Batch Memorandum** for 2023 SSA COLA

| Regulation: ACWDL 22-30, ACWDL 22-29 ACIN I-72-22 | |
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## Memorandum Purpose

This memorandum is intended to convey the batch EDBC scope, county actions and schedule for 2023 SSA COLA changes.

## Scope

- ### *CA-242752*

On Sunday, December 04, 2022, The System will update the SSA income and Medicare Part B Premium records as per the 2023 SSA COLA ACWDL 22-29, AWCDL 22-30, ACIN I-72-22.

- ### *CA-242753*

On Saturday, December 10, 2022, The System will process Batch EDBC to apply the 2023 SSA COLA values. Any program that had an SSI Income Record, Medicare Part B record, and OPA record update from CA-243012, was not updated with this SCR. They have been put 'On Hold' to be processed with CA-253595.

- ### *CA-243012*

On Monday, December 5, 2022, The System will update the OPA record as per the 2023 SSA COLA ACIN I-74 22. This change will be visible in the system on the following morning.

- ### *CA-252956*

On Tuesday, December 6, 2022, The System will update the OPA record as per the 2023 SSA COLA ACIN I- 74-22 (Placer, Yolo). This change will be visible in the system on the following morning.

- ### *CA-253595*

On Thursday, December 15, 2022, the System will revert the OPA records updated with CA-243012 and release to run through Batch EDBC the records that are 'On Hold' in SYS_TRANSACT that have not been ran through EDBC by user, and generate new SSA COLA lists for this population.

- ### *CA-253956*

With priority release 23.01.XX (Date TBD contingent on DHCS), the System will run Batch EDBC for CalFresh program only for February 2023 on cases with updated OPA records.

**Note**: Separate CITs for lists related to the COLAs will be sent after the data update and batch job is completed and the lists are available.

**Batch**
The Systems will identify the targeted population as below:

**Batch EDBC**
**SSA COLA (All programs)**: Run batch EDBC processing for:
Medi-Cal (non-Modified Adjusted Gross Income (non-MAGI) or mixed MAGI/non-MAGI),
CalFresh (CF),
Kin-GAP (KG),
Foster Care (FC),
Adoption Assistance (AAP)
Diversion
Immediate Need (IN)
CalWORKs (CW),
Refugee Cash Assistance (RCA),
Nutrition Benefit (NB)
Cash Assistance Program for Immigrants (CAPI),
General Assistance/General Relief (GA/GR)
- o Automated Solution
- o 'LA GAGR'

on cases that have an active program with an active person receiving SSA income or Medicare Premium Part B, that was updated by CA-242752.

Do not run batch EDBC on programs where an EDBC has already been ran for their respective months after CA-242752, was released.

*Note: Batch EDBC will not process cases if the income has already been updated by the worker or user.*

The Systems will exclude some cases from the targeted populations based on the following exceptions:

- CalWORKs, CalFresh, Medi-Cal and General Relief (Annual Agreement) cases will not be run through Batch EDBC if the SAR7 or RE packet with a submit month of December has a status of Generated, Sent, Received, or Incomplete. This will prevent these cases from receiving a change notice after the NA 960X, NA 960Y, or NA RE X. Users will apply the policy updates as a result of running EDBC as a normal part of the SAR/RE process.
- Medi-Cal program only cases that are aided by MAGI only.
- CalFresh programs that are Transitional.
- CalWORKs, CalFresh, Refugee Cash Assistance and General Relief cases will not be run if their Redetermination is due through the end of December 2023.
- Programs where the SSA Income Record and/or Medicare Part B record was updated and if they had an OPA record updated with CA-243012. These records will be marked

==as 'On Hold' in SYS_TRANSACT and will be updated through Batch with CA-253595 Reverse OPA record updates from SSI COLA import.==

While these programs will not be targeted, they may still be included in the batch EDBC process if another program on the same case is targeted.

**Journal Entry**

In CalSAWS, a standard Journal Entry will be created automatically based on the Sub Type code = 'CT942-SA' – Annual SSA COLAs and Related Changes when the batch is run.

**List Details**

Lists will be posted on Monday, December 12, 2022 for CalSAWS to aid the counties to review the cases to verify accurate action was taken after Batch EDBC completes. The lists will be available to the counties at the following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2022>CA-242753

The lists will display the standard columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

1. **List Name**: Cases with Program Closed by Batch
   **List Criteria**: Cases where this Batch EDBC process closed a program.
   **Additional Column(s)**: Program Type, Program Closure Reason
   **County Action**: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.

2. **List Name**: Cases with Person Closed by Batch
   **List Criteria**: Cases with Active programs where this Batch EDBC closed a person.
   **Additional Column(s)**: CIN#, Person Name, DOB, Program Type, Person Closure Reason
   **County Action**: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close persons, review these cases to verify the closure was accurate.

3. **List Name**: Cases with Read-Only EDBCs by Batch
   **List Criteria**: Cases where this Batch EDBC resulted in a Read-Only EDBC with all the Read-Only Reasons except the Read-Only Reason of "Protection due to Public Health Crisis/Natural Disaster".
   **Additional Column(s)**: Program Type, Read-Only Reason
   **County Action**: Since Batch EDBC could not automatically apply the intended change to these cases, users may process EDBC to apply intended changes, if applicable.

4. **List Name**: Medi-Cal Cases with FPL $1 under Limit
   **List Criteria**: Cases that have a passed Medi-Cal FPL program with a person receiving SSA whose net income is one dollar under the FPL limit.
   **County Action**: These cases could have passed the FPL program in error due to rounding in the 'Back Out' process. Counties can use this list to verify that the income test results are correct and take action if needed.

5. **List Name**: Cases Skipped by Batch
   **List Criteria**: Cases skipped in the Batch EDBC run including cases with a skip reason of 'EDBC has not been run since conversion'.
   **Additional Column(s)**: Program Type, Skip Reason
   **County Action**: Since Batch EDBC did not automatically apply the intended change to these cases, users may process EDBC to apply intended changes, if applicable.

Note: CA-243012 will provide a list of cases where the OPA record was not updated. Please refer to CA-243012 for list details.

*Please Note:*
- Review cases included in the lists and take necessary action.
- Review the Batch Eligibility Report each morning 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 Parameter pages.
- Cases with Potential Over Payment/Over Issuance will not be posted with 2023 SSA COLA as the changes are being implemented timely this year.

**Things to remember about this batch process**
- Cases that have a yellow banner requiring case review as a result of the benefit match process will skip if a worker has not processed EDBC since conversion. These cases will show on the Batch eligibility Report with a reason of "EDBC has not been run since conversion"

- The programs targeted for batch processing are determined once upfront. For batch processes that take more than one business day, cases are not removed or added to the batch processing based on user updates.
- There are multiple reasons why a case may not be successfully run through batch EDBC processing. Some examples include: No Worker Assigned, Overridden Program Case, Pending Program / Person / Application, EDBC results in an overpayment /over issuance. Please review tasks and the Batch Eligibility Report daily.
- The EDBCs run for this batch process will have a run reason of 'SSA COLA'. The EDBCs will have an EDBC Source of 'Batch EDBC Rules'.
- NOAs will not be held and will be printed and mailed the same night.
- The NA 960X notice for the benefit month of January will be sent on December 12, 2022.
- The NA RE X notice for the benefit month of January will be sent on December 15, 2022.
- When a user runs EDBC in which a prior pending month exists, the EDBC will result in a Read-Only status. However, when running a Batch EDBC process, 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 late reports, non-compliances, etc.) unexpectedly.
- The Ad-Hoc reporting database will be updated by Monday, December 12, 2022 when the CalSAWS system becomes available.
- The Medi-Cal Eligibility Data System (MEDS) file will transfer from C-IV to MEDS by Sunday, December 11, 2022; but MEDS will not process the file until 3:00pm on Monday, December 12, 2022 (Note: this is the normal process for files sent over the weekend).

# CalSAWS



## Development Schedule

| Task | The Systems |
|------|-------------|
| November 23, 2022 | Deliver the changes to the System Test team |
| November 28, 2022 | Start System Testing the changes |
| December 10, 2022 | Run Batch EDBC in production for The System |
| December 12, 2022 | Post lists to the CalSAWS Web Portal>System Changes>SCR and SIR Lists>2022>CA-242753 |

## Schedule Considerations
- Approximate count of programs for the Benefit Month of January,2023 to be processed for Batch EDBC approximately 1.1 Mil programs.

## Timeline
- Expected start of Batch EDBC processing
  - December 10, 2022- 5:00 PM
- Expected completion of Batch EDBC processing
  - December 11, 2022– 8:00 AM

### CalSAWS Calendar December 2022

| SUN | MON | TUES | WED | THUR | FRI | SAT |
|-----|-----|------|-----|------|-----|-----|
| | | | | 1<br><br>SAR 7 Discontinuance | 2 | 3<br><br>**CA-242752 2023 SSA COLA (CTCR/DCR)** |
| 4 | 5 | 6 | 7 | 8 | 9 | 10<br><br>**CA-242753 2023 SSA COLA Batch Run** |
| 11 | 12<br><br>**Post lists to the CalSAWS Web Portal>System Changes>SCR and SIR Lists>2022>CA-242753**<br>Send NA 960X Notice | 13 | 14 | 15<br><br>Send NA RE X Notice<br><br>CW/CF RE Packets | 16 | 17 |

| 18 | 19<br>Ten-Day<br>Discontinuance | 20 | 21<br>Main Payroll | 22 | 23 | 24 |
|---|---|---|---|---|---|---|
| 25 | 26<br>Send<br>SAR7/SAR2 | 27 | 28 | 39 | 30 | 31<br>CW/CF Disc |