

☒ CalSAWS M&E      ☐ CalWIN Migration

<b>Distribution Date:</b>	April 17, 2023
<b>To:</b>	PPOC.ContraCosta; PPOC.SantaClara; PPOC.Tulare; Consortium.RegionalManagers.R1; Consortium.RegionalManagers.R4
<b>CIT Name:</b>	<b>CA-259695 List of Skipped Cases</b>
<b>From:</b>	CalSAWS Project

**PPOCs, please forward to the appropriate impacted staff in your county:**

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| <input type="checkbox"/> General<br><input checked="" type="checkbox"/> Policy<br><input checked="" type="checkbox"/> CW<br><input checked="" type="checkbox"/> CF<br><input type="checkbox"/> MC<br><input type="checkbox"/> CMSP<br><input type="checkbox"/> FC/KG/AAP<br><input type="checkbox"/> Child Care<br><input type="checkbox"/> WtW<br><input checked="" type="checkbox"/> Other Program(s): GAGR Automated Sol<br><input type="checkbox"/> BenefitsCal<br><input type="checkbox"/> Customer Correspondence<br><input type="checkbox"/> Other _____<br><br><input type="checkbox"/> Reports | <input type="checkbox"/> Fiscal<br><input type="checkbox"/> Caseload Movement<br><input type="checkbox"/> Management<br><br><input type="checkbox"/> Fiscal<br><input type="checkbox"/> Security<br><input type="checkbox"/> Batch and Interfaces<br><input type="checkbox"/> Imaging<br><input type="checkbox"/> Migration<br><input checked="" type="checkbox"/> Conversion<br><input type="checkbox"/> Technical<br><input checked="" type="checkbox"/> Training<br><input checked="" type="checkbox"/> Help Desk |
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Description:	<p><b>Purpose</b> The purpose of this CIT is to inform the Wave 2 CalWIN migration counties about the lists of skipped cases associated with CA-259695.</p> <p><b>Background</b> CA-259695 was opened due to benefits being incorrectly skipped for incomplete/missing Periodic Reports (PR) and/or Redetermination/Recertification (RE) Packets. Although, the project has been working on different fixes, some cases require worker intervention.</p> <p><b>County Action</b> The case lists associated with CA-259695 have been posted to the CalSAWS Web Portal in the following location:   <div style="background-color: black; height: 30px; width: 100%;"></div> </p> <p>Users must review the Apr'23 Skips Report (there are 2 tabs-Current/future months and old months) for their county, identify the skip reason, and take appropriate action on the case.</p>
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**Identify the Skip Reason**

1. Go to the Program block for the affected program on Case Summary page.
2. Compare the Submit Month on the Skip report to the RE Due Month or SAR Due Month to identify what is causing the skip (i.e., whether it is a PR and/or RE related skip).
3. Follow the steps below once the skip reason is identified.

<b><u>Condition</u></b>	<b><u>County Action</u></b>
If the PR or RE Packet record is already present for the program.  PR or Redetermination/ Recertification status is not "Complete – EDBC Accepted" on the Customer Reporting List page.	Complete the Customer Reporting Detail page for the PR or RE Packet. To resolve the skip, mark the record "Reviewed – Ready to Run EDBC" for the Submit Month and run EDBC for the month after the Submit Month. After authorizing EDBC, the packet will be marked "Complete – EDBC Accepted."
If the PR or RE Packet is already present and marked as completed for the program for the given Submit Month but there is one more packet for the current and future months that is not marked as "Complete – EDBC Accepted"	Go to the Customer Reporting List page and sort the page where the most recent date is at the top. Review the PR and/or RE packets to be processed. <ul style="list-style-type: none"><li>• If the existing packet record is valid (if the PR or RE was due for the Submit Month), update the status to "Reviewed – Ready to Run EDBC", run EDBC for the month after the Submit Month. After authorizing EDBC, the packet will be marked "Complete – EDBC Accepted."</li><li>• If the existing packet record was incorrectly generated for the Submit Month, (Submit Month is not matching with either RE Due Month or SAR 7 Due Month), update the packet status to "Not Applicable" on the Customer Reporting Detail page, and run EDBC for the month after the Submit Month.</li></ul>

	<p>If the PR or RE Packet is not present for the programs.</p> <p><b>Note:</b> For GAGR, CalSAWS does not generate GAGR RE Packets, but the user may add a GAGR RE Packet record on the Customer Reporting List page.</p>	<p>Manually add a PR or RE Packet via the Template Repository. Click "Print Locally", select Print Reason of "Print for Case Record", followed by "Submit" and the PR or RE Packet record will be present in the Customer Reporting Detail page.</p> <p>To resolve the skip, mark the PR or RE Packet record "Reviewed – Ready to Run EDBC" for the Submit Month and run EDBC for the month after the Submit Month. After authorizing EDBC, the packet will be marked "Complete – EDBC Accepted."</p> <p><b>To add a GAGR RE Packet record</b></p> <p>On the Customer Reporting List page:</p> <ul style="list-style-type: none"> <li>• Select GA/GR RE Packet from the Display Type drop list and click the View button.</li> <li>• Enter the appropriate &lt;Submit Month&gt; in the RE Month field, then click the GA/GR RE Packet button. (The field and button only appear after the View button is clicked in the prior step).</li> <li>• Update the status on the Customer Reporting Detail page. RE Packet must be updated to "Reviewed – Ready to Run EDBC" for the Submit Month</li> <li>• Run EDBC for the month after the Submit Month. After authorizing EDBC, the packet will be marked "Complete – EDBC Accepted."</li> </ul>
	<p>CalFresh Case with SARN reporting type</p> <p>The reason for the skipped issuance is because there should be an RE packet 36 month prior to the current RE Due Date. For example, if the current RE Due Date is Dec 2023, one RE packet should exist for Dec 2020 with the status completed.</p>	<p>Manually add a CalFresh RE Packet via the Template Repository. Remember to enter RE Month (this would be the RE due month). Click "Print Locally", select Print Reason of "Print for Case Record", followed by "Submit" and the PR or RE Packet record will be present in the Customer Reporting Detail page.</p> <p>To resolve the skip, mark the PR or RE Packet record "Reviewed – Ready to Run EDBC" for the Submit Month and run EDBC for the month after the Submit Month.</p> <p><b>Reminder: Users cannot run regular EDBC for months prior to the migration month (March 2023); therefore, users must do a Manual EDBC as appropriate.</b></p> <p>After authorizing EDBC, the packet will be marked "Complete – EDBC Accepted."</p>
<p><b>Reminder:</b> Users cannot run regular EDBC for months prior to the migration month; therefore, users must do a Manual EDBC for these prior months.</p>		

	<p><b>Note:</b> If the RE was manually adjusted, the user must move the RE back to the prior RE Due Month before resolving the skip reason as described above.</p> <p>If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.</p>
Primary Project Contact:	<p>For CalFresh: Caroline Bui <a href="mailto:BuiC@CalSAWS.org">BuiC@CalSAWS.org</a></p> <p>For CalWORKs: Sarah Rich <a href="mailto:RichS@CalSAWS.org">RichS@CalSAWS.org</a></p> <p>For GAGR: Adelaide Mendoza <a href="mailto:MendozaAD@CalSAWS.org">MendozaAD@CalSAWS.org</a></p>
Backup Project Contact:	<p>For CalWORKs/CalFresh: <a href="mailto:Committee.CalWORKs_CalFresh.Facilitator@CalSAWS.org">Committee.CalWORKs_CalFresh.Facilitator@CalSAWS.org</a></p> <p>For GAGR: Caroline Bui <a href="mailto:BuiC@CalSAWS.org">BuiC@CalSAWS.org</a></p>
Attachments:	None
Web Portal Link:	<p>██████████</p> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> <li>1. Click on the CRFIs &amp; CITs link at the top of the page.</li> <li>2. Click on the "CalSAWS Information Transmittal (CIT)" folder.</li> <li>3. Click on the "2023" folder.</li> <li>4. Click on the appropriate CIT # folder.</li> </ol>