

## Memorandum

# CalSAWS Project

Regulations: ACL 23-XX, ACL 23-XX, ACIN-I-XX-23

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 23-XX, SCR CA-243002 will implement the CalWORKs Tier 1 and Tier 2 IRT increase on 08/17/2023.

Per ACL 23-XX, SCR CA-243002 will implement the CalWORKs MAP increase on 08/17/2023.

Per ACIN I-XX-23 and Nutrition Service SNAP COLA Memo FY 2024, SCR CA-243002 will implement the CalFresh COLA on 08/17/2023.

To minimize the work required by the counties, the project will begin running EDBCs on 8/26/2023. The EDBCs are expected to run from 8/26/2023 – 08/31/2023 with any remaining EDBCs ran on 09/09/2023. **NOTE: The WAVE 5 Counties (Alameda, Fresno and Sonoma) will not be included as part of the EDBC Batch population in CalSAWS.**

**CalWORKs MAP, Tier1 and Tier 2 IRT, CalFresh COLA Batch EDBC Processing will start on 08/26/2023 with SCR CA-243001:**

#### 1. Batch:

- a. Run batch EDBC beginning 8/26/2023 for the benefit month of 10/2023 including past RE due date cases for:
  - i. All cases with an active or ineligible Foster Care program with ARC aid codes 2T, 2S, or 2U effective for 10/2023 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-243002 went into production.
    3. EDBC will not run for 'Yellow Banner' programs. NOTE: Counties can check 'Yellow Banner' programs daily with the latest Qlik report.

- ii. Run the above population with Run Reason 'CW/CF COLA' (CT744\_CF).
- iii. Run the above population with Sub Type code 'CW/CF COLA' (CT942\_C1)
- b. Run batch EDBC beginning 8/26/2023 for the benefit month of 10/2023 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 09/2023, and the report status is Sent, Received, or Incomplete.
    3. A regular EDBC has already been processed for the benefit month since SCR CA-243002 went to production.
    4. EDBC will not run for 'Yellow Banner' programs. NOTE: Counties can check 'Yellow Banner' programs daily with the latest Qlik report.
  - ii. Run the above population with Run Reason 'CW/CF COLA' (CT744\_CF).
  - iii. 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 beginning 8/26/2023 for the benefit month of 10/2023 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 09/2023, and the report status is Sent, Received, or Incomplete.
    3. EDBC has already been processed for the benefit month since SCR CA-243002 went to production.
    4. EDBC will not run for 'Yellow Banner' programs. NOTE: Counties can check 'Yellow Banner' programs daily with the latest Qlik report.
  - ii. Run the above population with run reason 'CF COLA' (CT744\_FS).
  - iii. 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:**

SCR CA-219921 updated the SAR 2 to generate via EDBC so no DCR is needed to trigger or update the SAR 2.

TEMP 2250 will be mass mailed with the SCR CA-265790 targeted for 8/24/2023.

Notices will be generated with each County EDBC population and sent to the Central Printing facility in the evening at the time the County EDBC's are completed (08/26/2023 -08/31/2023). Any remaining County EDBC's ran on 09/09/2023 will have their NOAs generated and printed at that time.

3. **Journal:**

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's run with Sub Type code 'CW/CF COLA':  
"Batch EDBC ran for <month, year>. Batch EDBC Ran for <Effective Month>.  
Batch EDBC processed for the program for following reasons: CW/CF COLA. "
- b. CalWORKs and CalFresh EDBC's run with Sub Type code 'CW/CF COLA':  
"Batch EDBC ran for <month, year>. Batch EDBC Ran for <Effective Month>.  
Batch EDBC processed for the program for following reasons: CW/CF COLA. "
- c. CalFresh EDBC's run with Sub Type code 'CF COLA':  
"Batch EDBC ran for <month, year>. Batch EDBC Ran for <Effective Month>.  
Batch EDBC processed for the program for following reasons: CW/CF COLA. "

4. **List Details:**

**The listings below will be generated when all Counties' EDBC's have been processed and a separate CIT will be sent to inform Counties when the lists are available.** To reduce the size of the list files for easier downloading, the listings for SCR CA-243001 below will be generated by the following Regions:

Region	Counties
1	Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma
2	Alpine, Amador, Calaveras, El Dorado, Mono, Nevada, Placer, Sacramento, Sierra, Sutter, Tuolumne, Yolo, Yuba
3	Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity
4	Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, San Joaquin, San Luis Obispo, Stanislaus, Tulare
5	Imperial, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, Ventura
6	Los Angeles

**NOTE:** Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be 'List of Cases Discontinued by Batch EDBC Process-R1'. Also, for list a, d, and e, a separate list for FC programs will run as part of recommendation 1a.

The project will post the following lists to the web portal in the following location:

The **non-Foster Care program** lists will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-243001

The **Foster Care program** lists for **a, d** and **e** below will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-243001 > Foster Care Lists

List	County Action
<p>a. List of Cases Discontinued by Batch EDBC Process.</p> <p><u>Note:</u> Each region will have its own list. FC programs will have their own separate listings for this list type.</p> <p>Include additional columns to indicate program type and program closure reason</p>	<p>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.</p>
<p>b. List of Cases Where Batch EDBC Process Closed a Person.</p> <p><u>Note:</u> Each region will have its own list.</p> <p>Include an additional column to indicate program type</p>	<p>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.</p>
<p>c. List of CW Cases that Resulted in a Benefit Reduction.</p> <p><u>Note:</u> Each region will have its own list.</p> <p>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)</p>	<p>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.</p>

<u>List</u>	<u>County Action</u>
<p>d. List of Cases That Resulted in Read-Only EDBC</p> <p><i>Note:</i> Each region will have its own list. FC programs will have their own separate listings for this list type.</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><i>Note:</i> Each region will have its own list. FC programs will have their own separate listings for this list type.</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>

List	County Action
<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 09/2023 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 10/2023</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 09/2023</li> <li>2. Program person has a Customer Option of type 'Optional Child - Receives Child Support' with an end date in 09/2023</li> </ul> </li> </ul> <p><i>Note:</i> Each region will have its own list. CA-205112 will update the functionality to only allow Optional Child back into the household mid-period if user makes the request. This listing will no longer be needed once CA-205112 is implemented in CalSAWS.</p>	<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>

List	County Action
<p>g. List of Cases Discontinued Or Denied for Over Income Prior to COLA Increase. Cases that meet the following criteria:</p> <ul style="list-style-type: none"> <li>i. EDBC run between 7/31/2023 and prior to deployment of CTCR SCR CA-243002 for the benefit month of 10/2023 has a denial or discontinuance reason of "Over Income" or "Over Income-\$0 Allotment".</li> </ul> <p>Include additional columns to indicate program type and program status reason</p> <p><u>Note:</u> Each region will have its own list.</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> <ul style="list-style-type: none"> <li>i. There is at least one overridden EDBC effective for the current or the Prior Benefit month</li> <li>ii. Batch EDBC is run for the COLA Month (10/2023)</li> <li>iii. Program is CalFresh, CalWORKs, RCA or Nutritional Benefit</li> </ul> <p>Include additional column to indicate program type.</p> <p><u>Note:</u> Each region will have its own list. 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>

### Development Schedule

1. Deliver the FC/CW/CF driving query and list queries to the System Test team on 08/09/2023.
2. System Testing of the FC/CW/CF batch process will occur between 08/09/2023 and 08/25/2023.
3. FC/CW/CF batch EDBC processing will begin in production on 08/26/2023.

**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.
- Counties can check 'yellow banner' programs daily with the latest Qlik report.

**Schedule Considerations:**

- CalSAWS will not be down when the batch processing begins on Saturday, August 26, 2023. **Note:** The CalSAWS application will be unavailable on Sunday, August 27, 2023, for scheduled system maintenance.
- There will be no interruption to the regularly scheduled batch jobs during the COLA batch processing.
- Approximately 2.3 + million active programs will be processed during the FC/CW/CF batch EDBC process in CalSAWS for the benefit month of 10/2023.
- Approximately 50,000 programs processed per hour via batch EDBC.

**Timeline:**

- FC/CW/CF Batch EDBC processing will begin on 08/26/2023 and continue thru 08/31/2023.
- Any remaining EDBCs after 8/31/2023 will be ran on 09/09/2023.



## August 2023

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 SAR 7 Discontinuance  Run Monthly Payroll - Foster Care (JBxxF124M)	2	3 FC/KG/AAP/ /CF CNI CalSAWS CTCR Rate Update	4 CW/CF RE appt Day 1 (County 19) and Non Transition Food stamps NEC - Generate and Balance(JB00R509)	5 FC/KG/AAP/ /CF CNI CalSAWS Batch run  CW/CF RE appt Day 2 (County 19)
6	7	8	9	10 NA 960X Non Magi Redeter(MC 210), Magi Redeter(MC 216), Mixed Redeter(MC 217) Medi-Cal RE Packet	11	12
13	14	15 C-IV CW/CF RE Packets	16	17 CW/CF COLA CTCR Rate Update	18	19 10-Day Cutoff
20	21	22	23	24 Main Payroll (40 Counties Day 1)	25 Main Payroll (County 19 Day 1)  Main Payroll (Riverside County Day 1)  Send SAR7  Find Balderas Cases (JB00R700M)	26 FC/CW/CF COLA Batch run will begin.
27 MEDS Recon (Former C-IV Counties)  FC/CW/CF COLA Batch run will continue.	28 FC/CW/CF COLA Batch run will continue.	29 FC/CW/CF COLA Batch run will continue.	30 CW/CF Redetermination  FC/CW/CF COLA Batch run will continue.	31 FC/CW/CF COLA Batch run will continue.		