

# [CA-257579] Batch EDBC for 2024 CalFresh SSI COLA

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Henry Thamas</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.11]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>24.01.06</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>814</b>
Reporter:	<b>Cynthia Ridley</b>	Regulation Reference:	<b>ACIN I-XX-XX</b>	Created:	<b>03/02/2023 03:10 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Batch Performance, Business Process, Central Print]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Review and approved by Caroline Bui 10/5/2023

**Expedite Approval:**

**Current Design:**

On 01/05/2024, DHCS provided the file for SSI COLA and the file was run in production with SCR CA-266913.

**Request:**

CalSAWS will run import file from DHCS with SCR CA-266913 to update new SSI Only, SSP Only or SSI/SSP amounts and batch EDBC must run to calculate new benefit amounts for affected CalFresh (CF) households.

**Recommendation:**

- 1) On 01/06/2024, run Batch EDBC in targeted-program mode for the February 2024 benefit month for the cases that meet the following criteria:
  - a) All active CF programs (this includes Transitional, or TCF programs) and any NB or CW programs linked to those CF programs with an active person whose SSI Only, SSP Only or SSI/SSP income amount was modified by CA-266913 (PI00E426 job name on 01/05/2024).
  - b) Exclude the following cases:
    - i ) The benefit month is past the latest RE due date for the CF (or CW if applicable) program.
    - ii) The CF (or CW if applicable) program has a SAR7 Due Month of 01/2024 and the report status is 'Generated', 'Sent', 'Received', or 'Incomplete'.
    - iii) CF EDBC has already been processed for the benefit month since changes from CA-266913 went to production.
    - iv) OPA record has been modified or replaced by user since changes from CA-266913 went to production. User will be responsible for running EDBC.
    - v) Batch EDBC will not run EDBC for 'Yellow Banner' programs where the high-dated EDBC has a source of 'Conversion'. Counties can check 'Yellow Banner' programs daily with the latest Qlik report.
  - c) Run the above population with Run Reason 'SSA COLA' (CT744\_SS).
  - d) Run the above population Sub Type code 'CT942-SA' to create the following Journal entry:
 

Short Description: Batch EDBC ran for <month, year>  
 Long Description: Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: 'Annual SSA COLAs and Related Changes'.

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

- 2) Generate a statistical report called 'COLA Stats by County Report' that summarizes the EDBC count for each program included in the COLA by County and contains the following fields:
  - <program> EDBC Counts
  - <program> EDBC Processed
  - <program> EDBC Skipped (Exception)
  - <program> Success %
  - Total EDBC Count
  - Total EDBC Processed
  - Total EDBC Skipped (Exception)

- Overall Success Rate %
- Total NOAs Generated

Note: The 'Total' and 'Overall Success' fields above will include all programs in the COLA.

This report will be posted at:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2024 > SCR CA-257579.

3) Generate the following lists from the batch EDBC process. The listings below will be generated by the following Regions:

R1 - Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma

R2 - Alpine, Amador, Calaveras, El Dorado, Mono, Nevada, Placer, Sacramento, Sierra, Sutter, Tuolumne, Yolo, Yuba

R3 - Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity

R4 - Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, San Joaquin, San Luis Obispo, Stanislaus, Tulare

R5 - Imperial, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, Ventura

R6 - Los Angeles

The lists below will display these standard columns:

- 1) Case Name
- 2) Case Number
- 3) County
- 4) Unit
- 5) Unit Name
- 6) Office Name
- 7) Worker ID

a) List of programs discontinued by the batch EDBC process. Include these additional columns:

- Program Type
- Program Closure Reason

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be 'List Name -R1'

b) List of cases where the batch EDBC process closed a person. Include these additional columns:

- CIN #
- Person Name
- DOB
- Program Type
- Person Closure Reason

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be 'List Name -R1'

c) List of cases which resulted in a read-only EDBC. Include these additional columns:

- Program Type
- Read-Only Reason

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be 'List Name -R1'

d) Unprocessed cases where the batch EDBC process skipped a program. Include these additional columns:

- Program Type
- Skip Reason

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be 'List Name -R1'

e) List of cases excluded from COLA. Include these additional columns:

- Program Type
- Reason for Exclusion Description

3e NOTE: These would be cases that are excluded from the driving query (i.e. criteria in 1b i-iv above). The population for criteria 1b v 'yellow banner' cases can be viewed in the Qlik dashboard report "Converted Case

Review Dashboard' and will not be part of this listing. Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be 'List Name -R1'

General Note: A list of cases where the OPA records were not updated by the imported DHCS file will be provided with CA-266913.

These lists will be posted at:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2024 > SCR CA-257579.

4) Batch Operations:

a. Run the new COLA batch sweep for CF programs with associated NB and CW programs (population from recommendation 1a in SCR CA-257579) to insert records into SYS\_TRANSACT\_COLA for targeted programs on the case for the month of 02/2024.

b. Run COLA Batch EDBC framework for CF programs with associated NB and CW programs (population from recommendation 1a in SCR CA-257579) in SYS\_TRANSACT\_COLA.

A list of affected cases will be posted to the CalACES Web Portal in the following location:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2024 > SCR CA-257579.

Run Online EDBC.

**Outreach Description:**

**Alternative Procedure Description:**

**Operational Impact Estimate:**

**814**

Automated Test :	0	Batch/Interfaces :	56	Batch Operations :	40
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	30	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	395	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	0	Performance :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	175
Tech Arch :	0	Tech ForgeRock :	0	Tech Support :	0
Tech Ops :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

**Content Revision Status-1:**

Pending SCRIB

**Content Revision Description-1:**

1. Recommendation Change: Management decided against doing separate COLA lists by region. Removed region breakout from listing recommendations. Also added EDBC Read Only and EDBC Stack Trace columns to the COLA Stats Report. See update below:

Before:

2) Generate a statistical report called 'COLA Stats by County Report' that summarizes the EDBC count for each program included in the COLA by County and contains the following fields:

- <program> EDBC Counts
- <program> EDBC Processed
- <program> EDBC Skipped (Exception)
- <program> Success %
- Total EDBC Count
- Total EDBC Processed
- Total EDBC Skipped (Exception)
- Overall Success Rate %
- Total NOAs Generated

Note: The 'Total' and 'Overall Success' fields above will include all programs in the COLA.

3) Generate the following lists from the batch EDBC process. The listings below will be generated by the following Regions:

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R2 - Alpine, Amador, Calaveras, El Dorado, Mono, Nevada, Placer, Sacramento, Sierra, Sutter, Tuolumne, Yolo, Yuba

R3 - Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity

R4 - Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, San Joaquin, San Luis Obispo, Stanislaus, Tulare

R5 - Imperial, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, Ventura

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General Note: A list of cases where the OPA records were not updated by the imported DHCS file will be provided with CA-266913.

These lists will be posted at:

After: -Removed Regions for listings and added new columns to COLA stat report:

2) Generate a statistical report called 'COLA Stats by County Report' that summarizes the EDBC count for each program included in the COLA by County and contains the following fields:

- <program> EDBC Counts
- <program> EDBC Processed
- <program> EDBC Skipped (Exception)
- <program> EDBC Read Only
- <program> EDBC Stack Trace
- <program> Success %
- Total EDBC Count
- Total EDBC Processed
- Total EDBC Skipped (Exception)
- Total EDBC Read Only
- Total EDBC Stack Trace
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2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After: