Homeless Assistance – Permanent

This CalSAWS Quick Guide (QG) provides the end-user with functional instructions on Homeless Assistance - Permanent in the System.

The QG can be used as a training medium for the following situations:

- For displaying CalSAWS functional processes and changes
- To summarize and repeat key points from a Web-Based Training (WBT) or Job Aid

The QG may include functional instructions, as well as screenshots from the System. It may highlight new functional processes, pages, page sections, fields, drop lists, etc.

CalSAWS Process

In CalSAWS, Homeless Assistance – Permanent data collection information is entered on the following pages:

- Homeless Assistance List - Displays Temporary and Permanent Homeless Assistance records for the case
- Homeless Assistance Detail – Permanent - Allows you to enter Permanent Homeless Assistance information for documentation which may be factored into the EDBC results
- Money Management Detail - Used when making benefit payments directly to the vendor
- Payment Amount Used By EDBC – Captures information EDBC uses to determine the vendor payment
- Expense Detail - Captures shelter expense information for Permanent Homeless Assistance which may be factored into the EDBC results

You may access these pages from Eligibility on the Global navigation bar and Customer Information from the Local navigator.

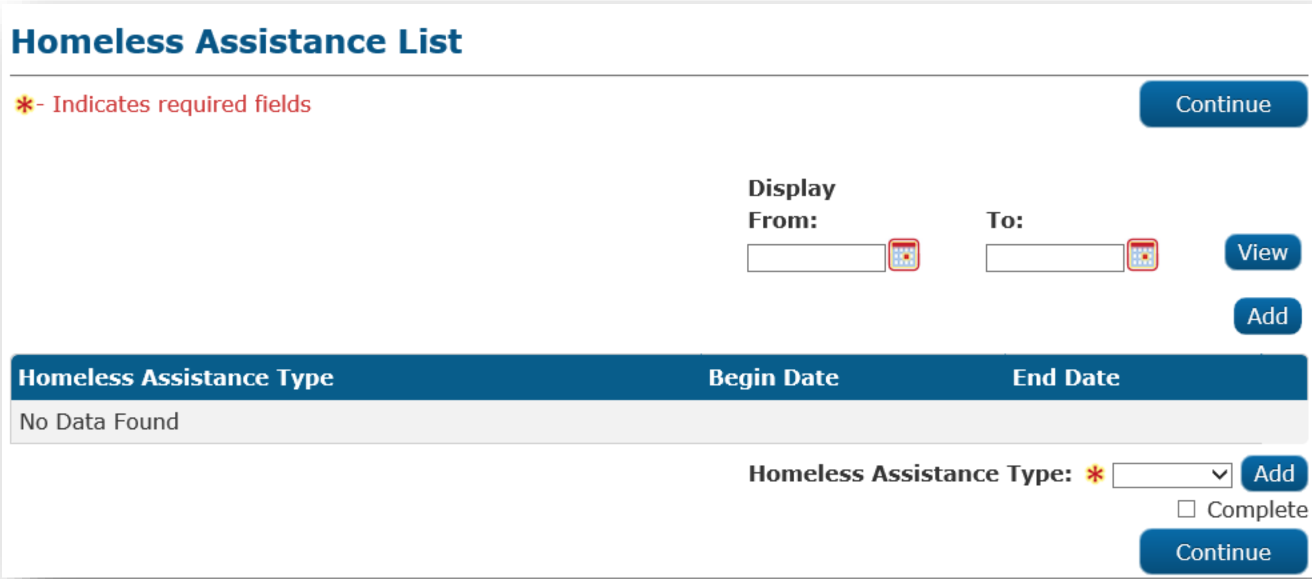
After entering Homeless Assistance data collection information, run EDBC to approve or deny the Homeless Assistance program and issue benefits. Although you may create a service arrangement to issue a voucher, the vendor payment is created through EDBC and not a payment request.

Note: Information manually entered on the Homeless Assistance time limits pages does not trigger a HA20 MEDS transaction. MEDS transactions are only triggered when Homeless Assistance benefits are issued.

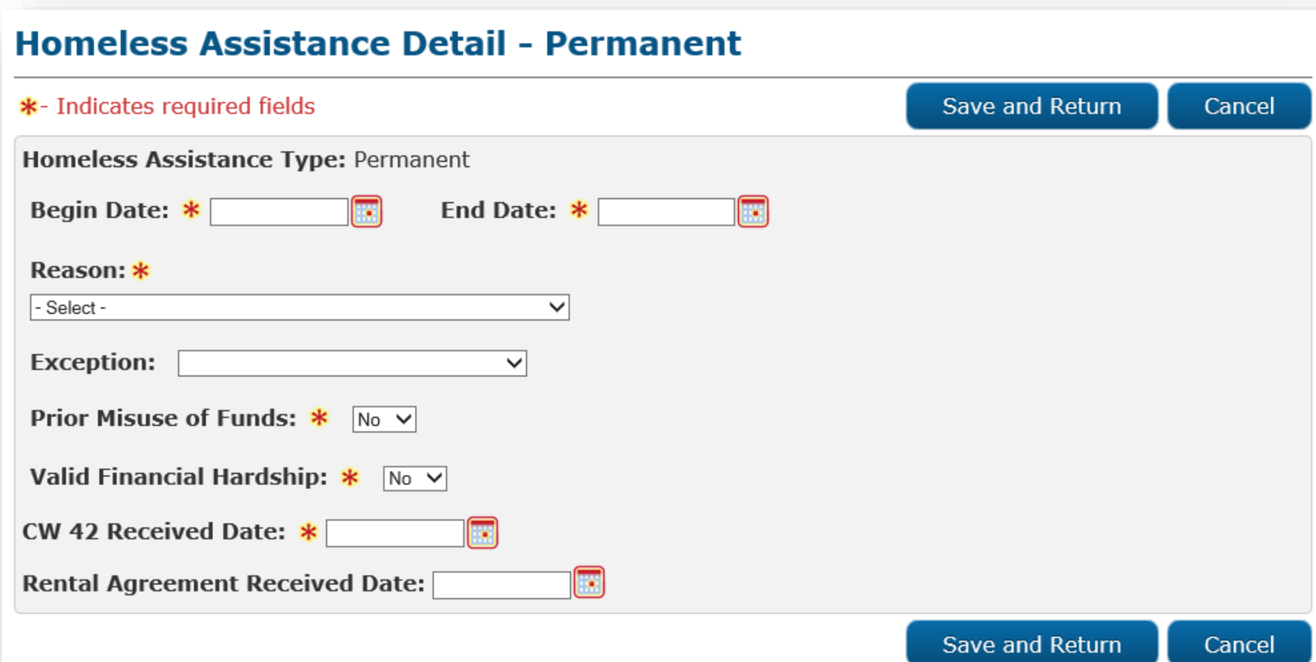
Homeless Assistance - Permanent – Data Collection

The steps below outline how to enter Homeless Assistance – Permanent data collection:

1. Click the **Homeless Assistance** link in the **Non Financial** section of the **Task** navigation bar to access the **Homeless Assistance List** page



2. Select **Permanent** from the **Type** drop list
3. Click the **Add** button to access the **Homeless Assistance Detail – Permanent** page in Add mode



4. Enter the **Begin Date**, **End Date** and select the appropriate **Reason** from the **Reason** drop list

Reason drop list selection options are:

- Lacks regular, fixed night time residence
- Living in place not designed as sleeping place for people
- Notice that could lead to eviction

- Primary night time residence is supervised shelter for temp living
- Received Notice to Pay Rent or Quit or eviction notice (Select this option to issue past due rent)
- Sharing residence with family/friends on temp basis

5. Depending on the **Reason** selected you may need to select a **Exception** from the **Exception** drop list

Exception drop list selection options are:

- State/Federal Declared Disaster (Select this option monthly during a state or federally declared disaster)
- Domestic Violence
- Former Residence Uninhabitable
- Physical Mental Illness

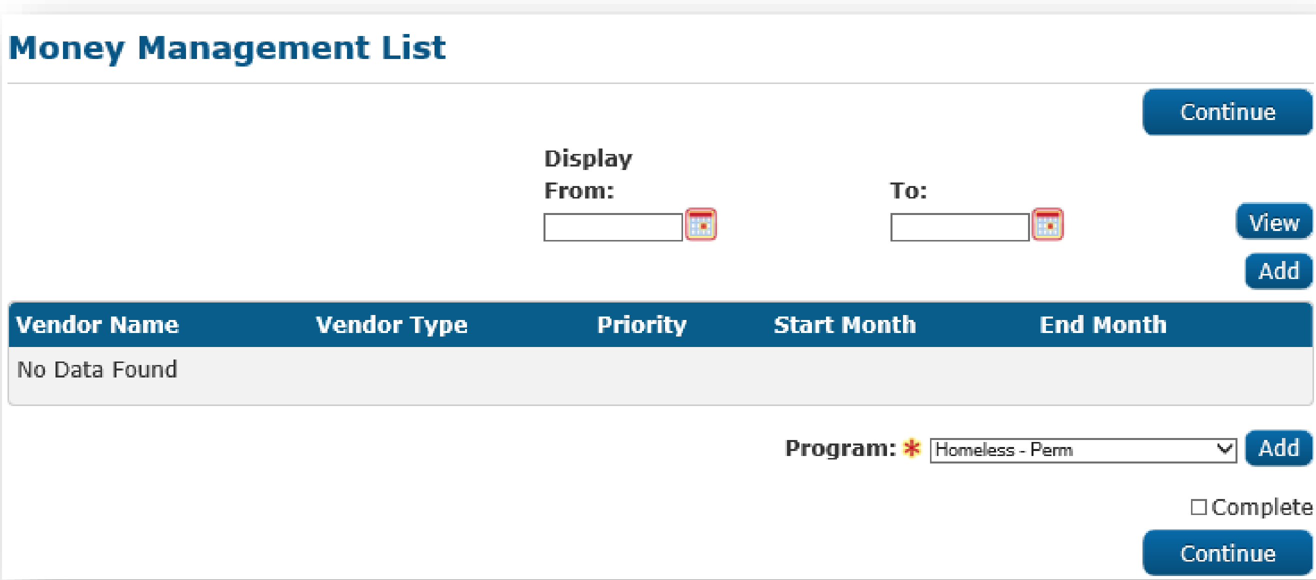
6. Enter the date you receive the Statement of Facts – Homeless Assistance, CW 42 in the **CW 42 Received Date** field. The System automatically generates the CW 42 when you add the Homeless Assistance program to the case
7. Enter the **Rental Agreement Received Date** if appropriate. This field is not required but EDBC does not approve Permanent Homeless Assistance unless it is completed
8. Click the **Save and Return** button

Issuing a Payment to a Vendor

Data for vendor payments is entered on the Money Management pages and the issuance is created through EDBC.

The steps below outline the process:

1. Click the **Money Mngmt** link on the **Task** navigation bar to access **the Money Management List** page



2. Select **Homeless – Perm** from the **Program** drop list
3. Click the **Add** button to access the **Money Management Detail** page in Add mode

4. Complete the fields at the top of the **Money Management Detail** page.

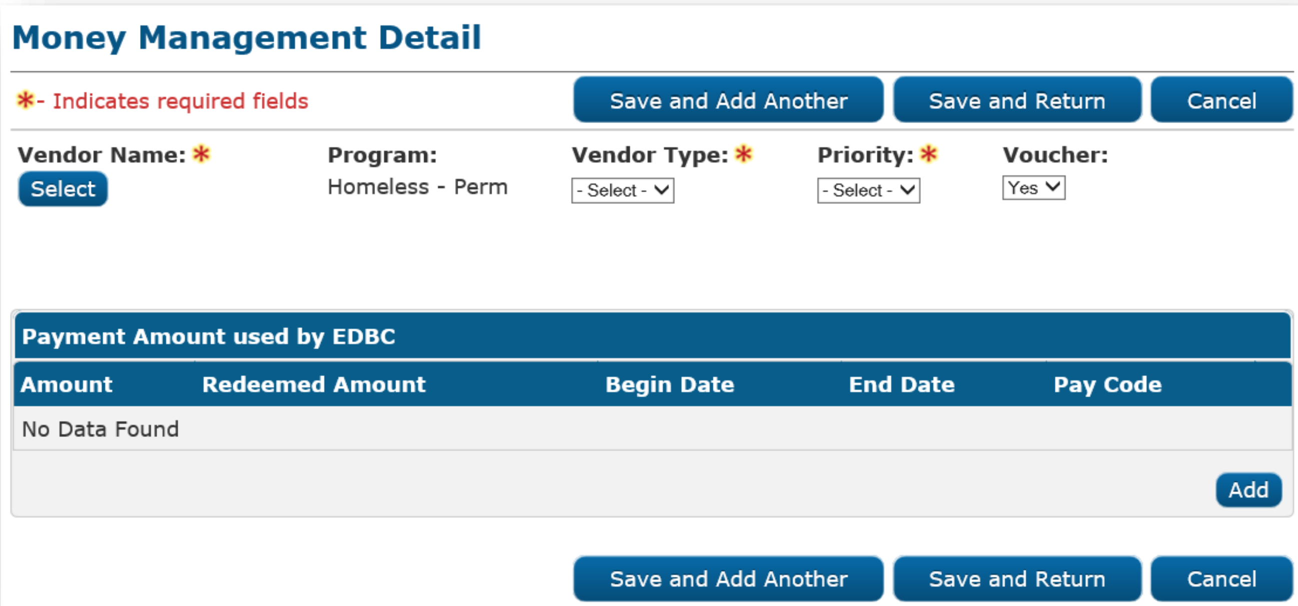
A. Click the **Select** button under the **Vendor Name** field
B. The **Select Money Management Resource** page displays.
C. Enter the search criteria and click the **Search** button
D. The **Search Results Summary** displays, select the appropriate vendor
E. Click the **Select** button

5. The **Money Management Detail** displays

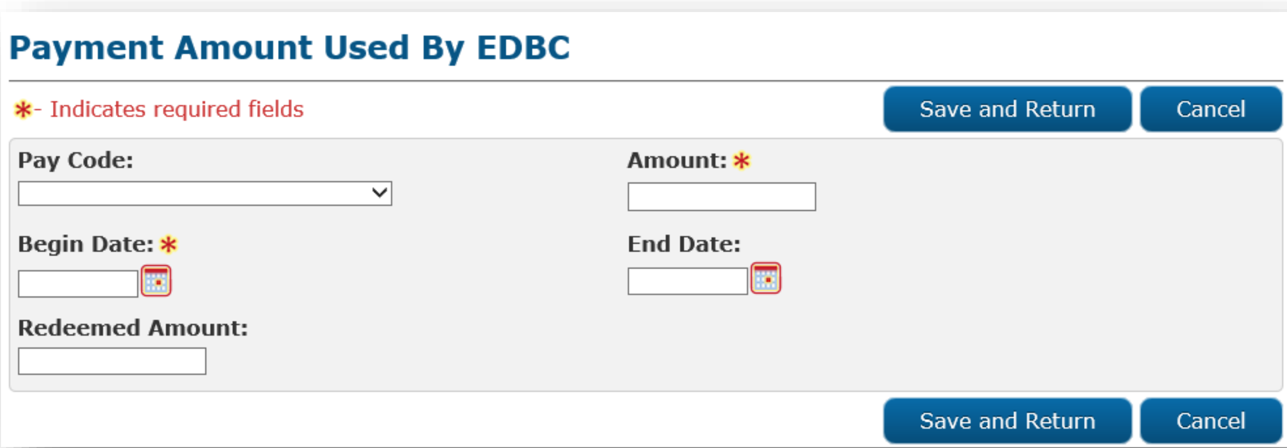
F. Select the **<Vendor Type>** from the **Vendor Type** drop list
G. Select the **<Priority Rank>** from the **Priority** drop list.

Note: follow your County policy when determining Priority.

H. If you are issuing a voucher, select **Yes** from the **Voucher** drop list.



6. Click the **Add** button in the **Payment Amount used by EDBC** page section to access the **Payment Amount Used By EDBC** page in Add mode



7. Select the **Pay Code** from the **Pay Code** drop list, if appropriate
8. Enter **<Payment Amount>** in the **Amount** field

9. Enter **<Date>** in the **Begin Date** field
10. The **Redeemed Amount** field displays if you selected **Yes** from the **Voucher** drop list on the **Money Management Detail** page. Follow your County's process for updating the **Redeemed Amount** field
11. Click the **Save and Return** button, then click the **Save and Return** button on the **Money Management Detail** page

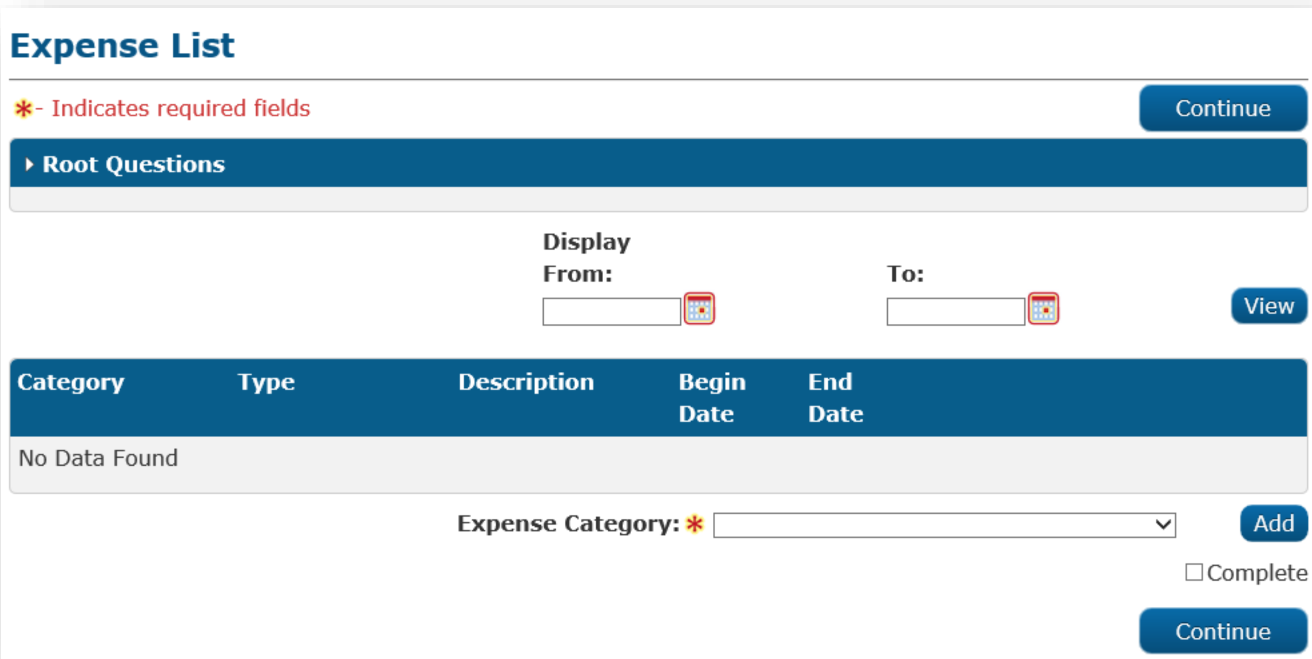
Entering Expenses

Shelter and utility expense types for Permanent Homeless Assistance are:

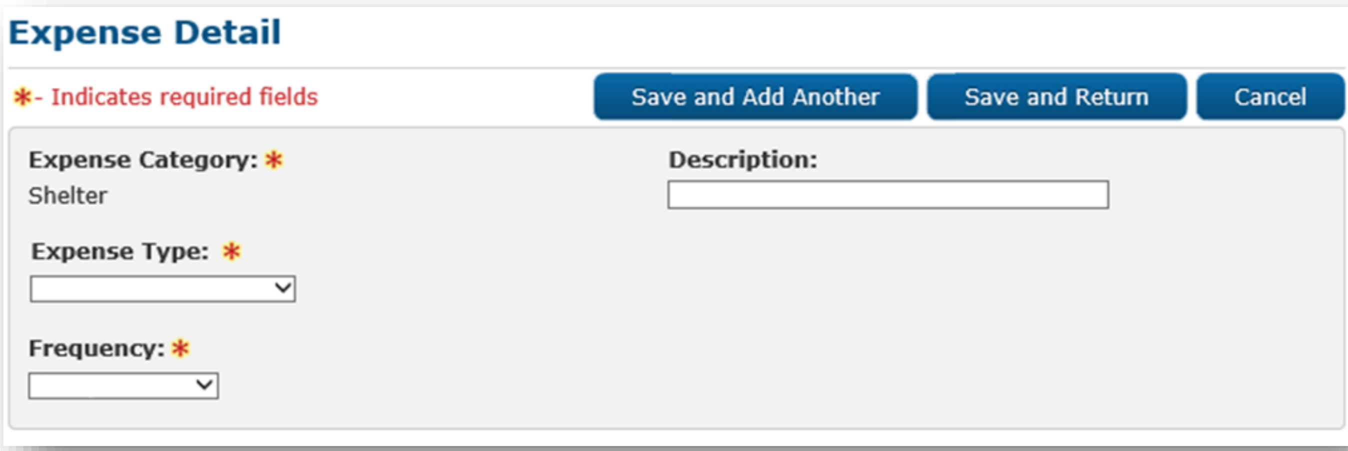
- Homeless-Past Due Rent
- Homeless-Security Deposit
- Utilities

The steps below outline how to enter shelter and utility costs:

1. Click the **Expenses** link in the **Financial** section of the **Task** navigation bar to access the **Expense List** page



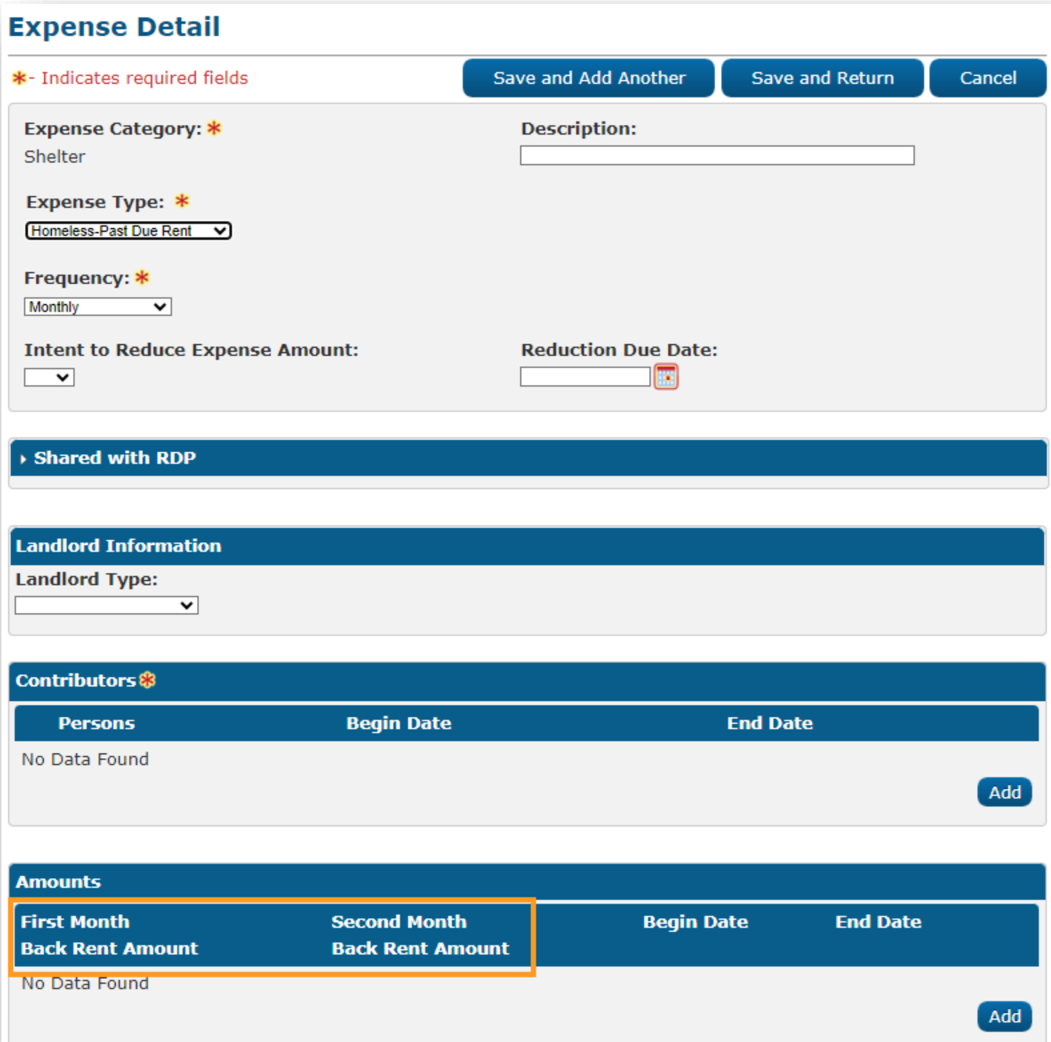
2. Select **Shelter** from the **Expense Category** drop list and click the **Add** button to access the **Expense Detail** page in Add mode



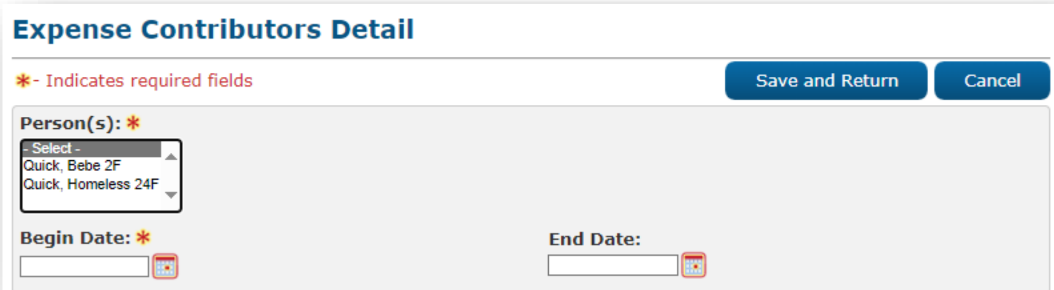
3. Select the appropriate **<Expense>** from the **Expense Type** drop list

Note: The steps for the different expense options previously mentioned are discussed below.

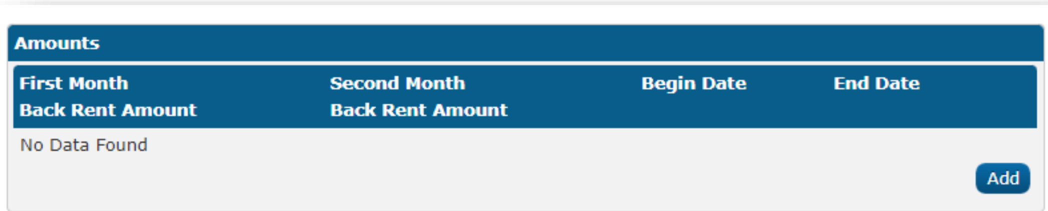
4. For past due rent select **Homeless-Past Due Rent** from the **Expense Type** drop list
   Note: The columns in the **Amounts** page section update to display **First Month Back Rent Amount** and **Second Month Back Rent Amount.** These amounts are entered on the **Expense Amount Detail** page.

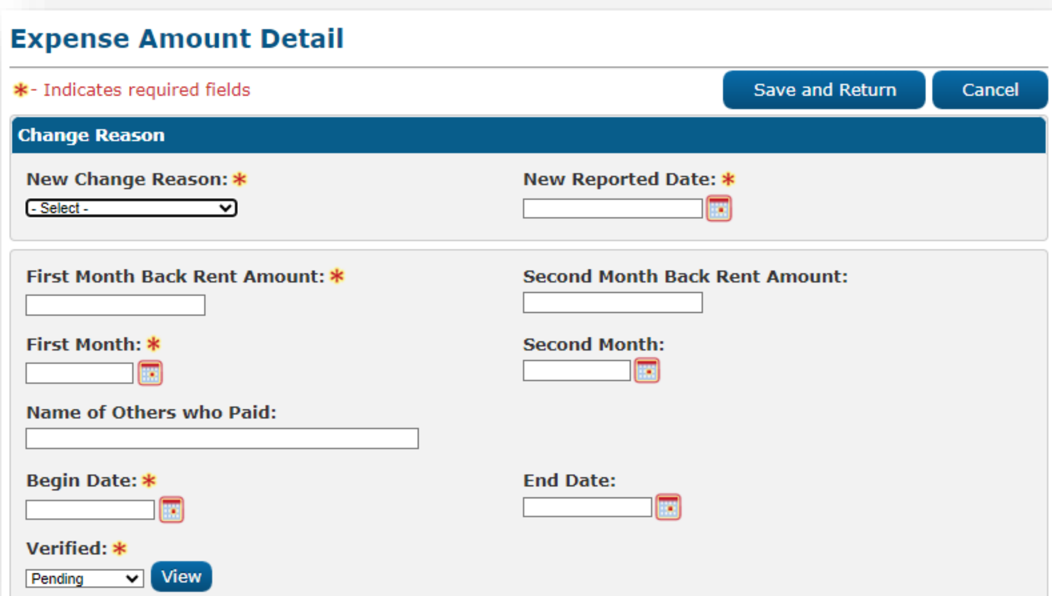


5. Click the **Add** button in the **Contributors** page section to access the **Expense Contributors Detail** page



6. Select the contributors from the **Person(s)** multi-select list
7. Enter **<Begin Date>** in the **Begin Date** field
8. Click the **Save and Return** button
9. The **Expense Detail** page displays, click the **Add** button in the **Amounts** page section

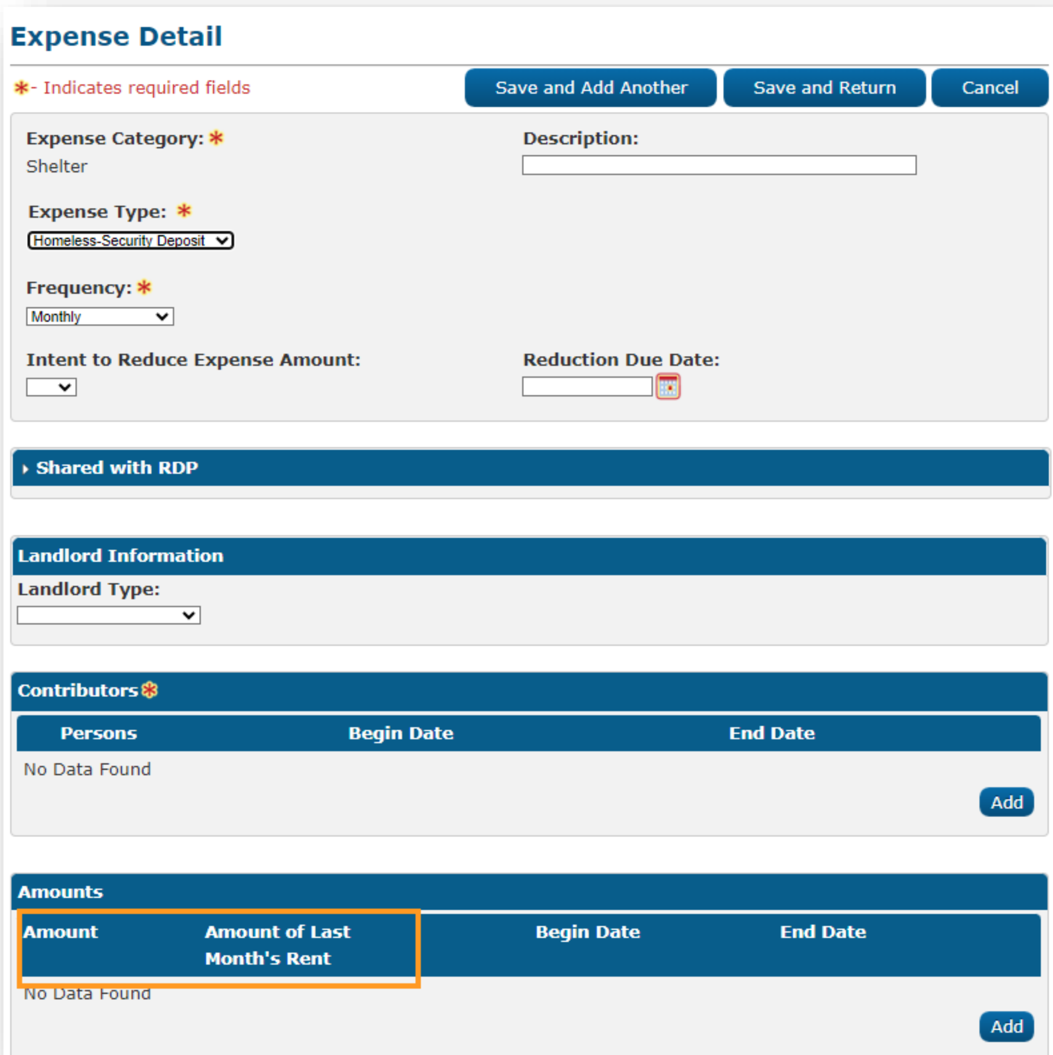




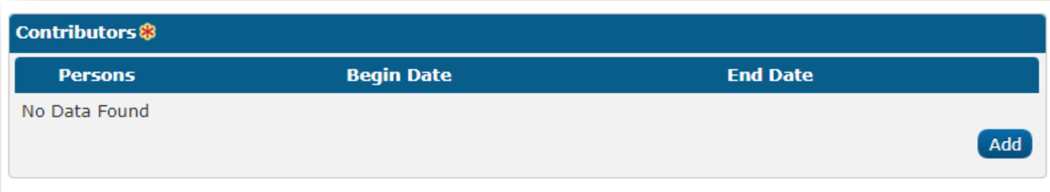
10. On the **Expense Amount Detail** page, select the **New Change Reason** and enter the **New Reported Date**
11. Enter **<First Month Back Rent Amount>** in the **First Month Back Rent Amount** field
12. Enter **<Second Month Back Rent Amount>** in the **Second Month Back Rent Amount** field, if appropriate

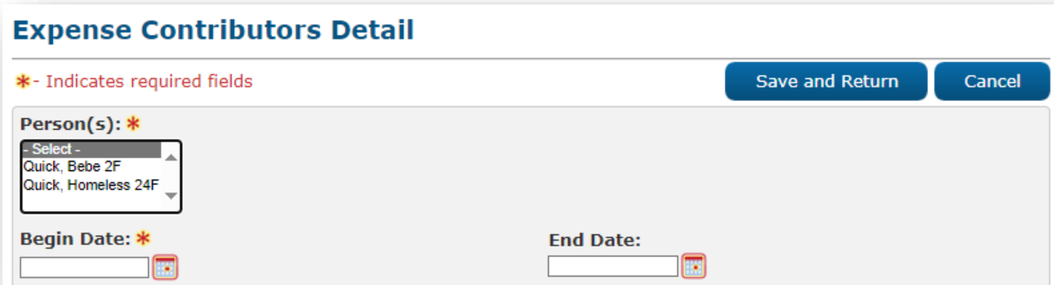
13. Enter **<First Month>** in the **First Month** field
14. Enter **<Second Month>** in the **Second Month** field, if appropriate
15. Enter **<Begin Date>** in the **Begin Date** field
16. Select **Verified** from the **Verified** drop list
17. Click the **Save and Return** button
18. The **Expense Detail** page displays, click the **Save and Return** button
19. When a customer is requesting a security deposit payment, select **Homeless-Security Deposit** from the **Expense Type** drop list

Note: The columns in the **Amounts** page section update to display **Amount** and **Amount of Last Month's Rent.** These amounts are entered on the **Expense Amount Detail** page.

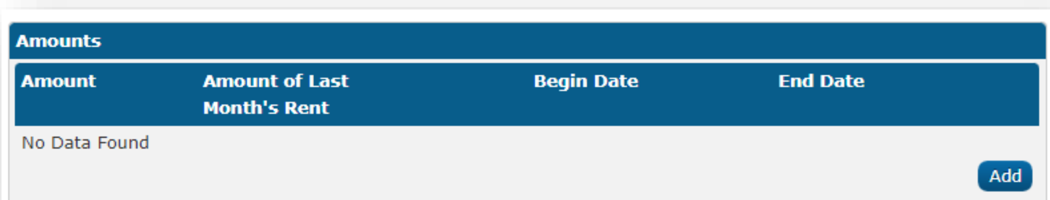


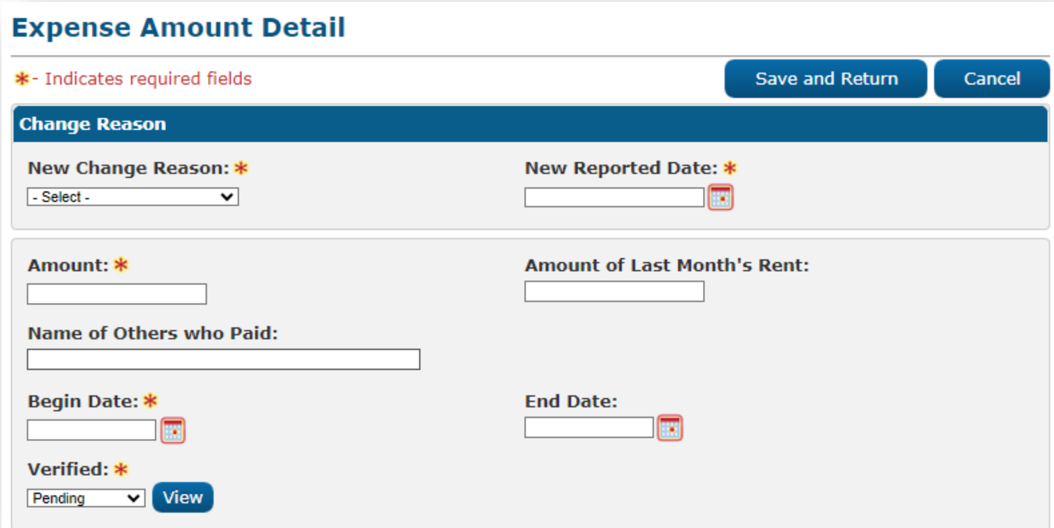
20. Click the **Add** button in the **Contributors** page section



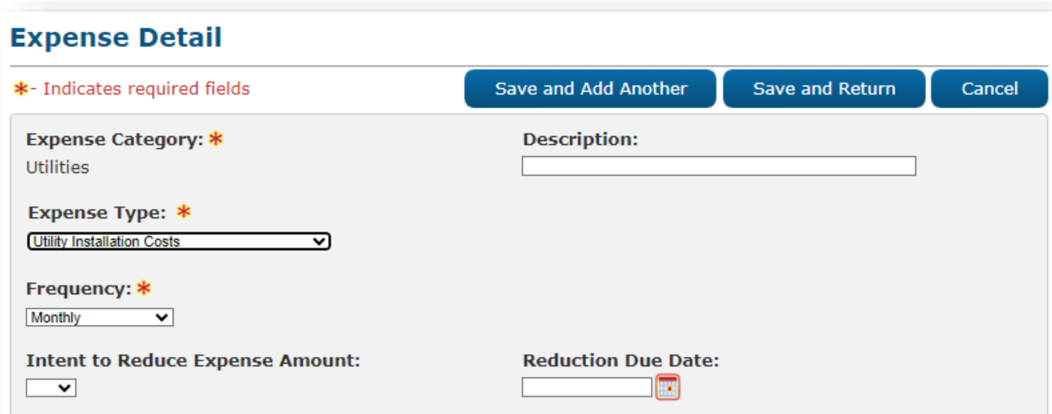


21. On the **Expense Contributors Detail** page, select the **<Contributors>** from the **Person(s)** multi-select list
22. Enter **<Begin Date>** in the **Begin Date** field
23. Click the **Save and Return** button
24. The **Expense Detail** page displays, click the **Add** button in the **Amounts** page section

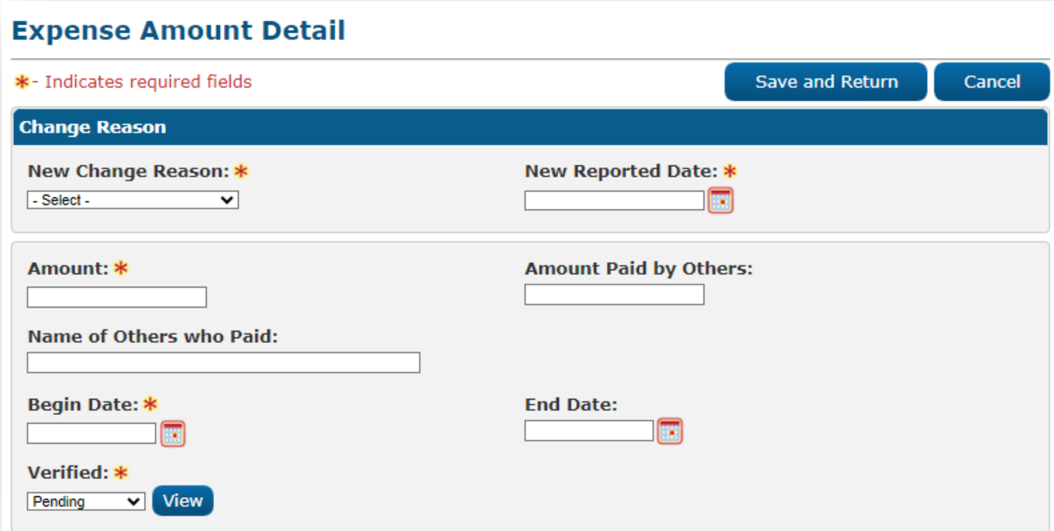




25. On the **Expense Amount Detail** page, select the **New Change Reason** and enter the **New Reported Date**
26. Enter **<Amount>** of the security deposit in the **Amount** field
27. Enter **<Amount>** of the last month's rent in the **Amount of Last Month's Rent** field, when a customer's rent is covered by a subsidy or Section 8 leave this field blank
28. Enter **<Begin Date>** in the **Begin Date** field
29. Select **Verified** from the **Verified** drop list
30. Click the **Save and Return** button
31. The **Expense Detail** page displays, click the **Save and Return** button
32. If the customer is also eligible to a payment for utilities, select **Utilities** from the **Expense Category** drop list on the **Expense List** page and click the **Add** button



33. On the **Expense Detail** page, select **Utility Installation Costs** from the **Expense Type** drop list
34. Click the **Add** button in the **Contributors** page section and complete the **Expense Contributors Detail** page
35. Click the **Add** button in the **Amounts** page section



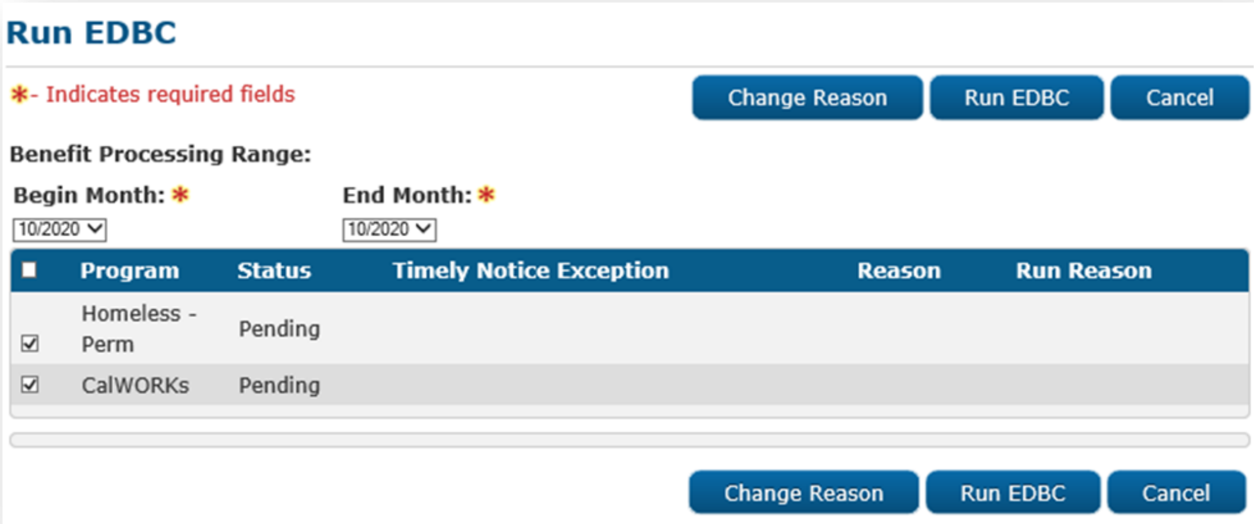
36. On the **Expense Amount Detail** page, select the **New Change Reason** and enter the **<New Reported Date>**
37. Enter **<Amount>** of the utility installation cost in the **Amount** field
38. Enter **<Begin Date>** in the **Begin Date** field
39. Select **Verified** from the **Verified** drop list
40. Click the **Save and Return** button
41. The **Expense Detail** page displays, click the **Save and Return** button

Homeless Assistance - Permanent – EDBC

The steps below outline the process to run and accept EDBC results:

1. Click the **Run EDBC** link in the **Task** navigation bar to access the **Run EDBC** page

Note: EDBC only approves Permanent Homeless Assistance if the CalWORKs program is active or you are running CalWORKs EDBC to approve the program at the same time as the Permanent Homeless Assistance.



Run EDBC

*- Indicates required fields

Change Reason | Run EDBC | Cancel

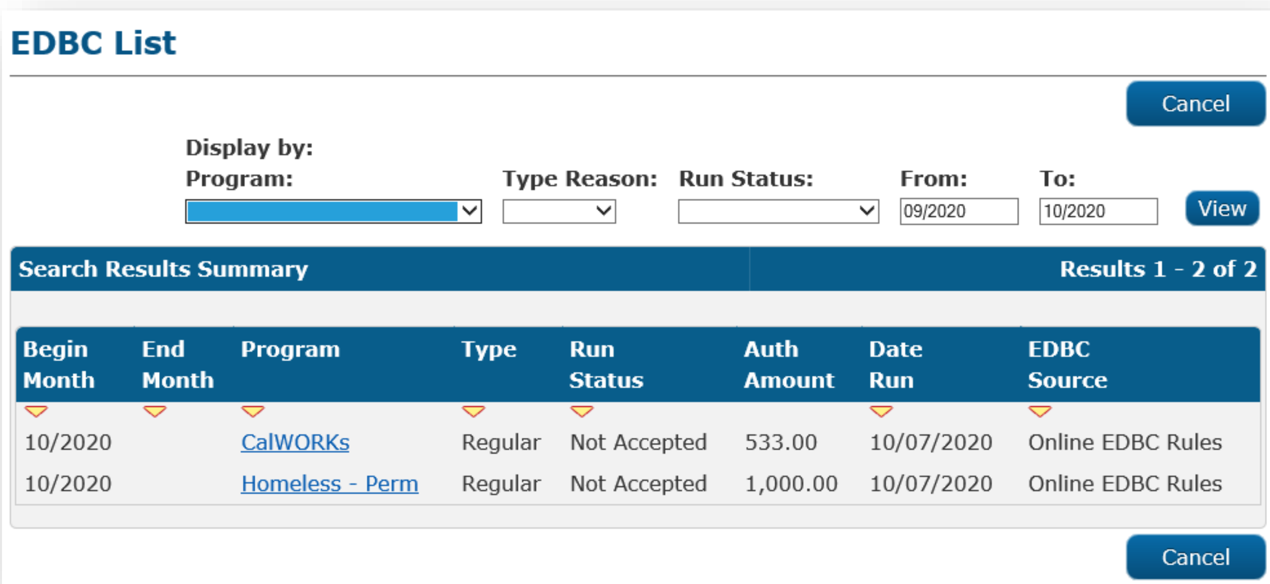
Benefit Processing Range:

Begin Month: * 10/2020 **End Month:** * 10/2020

	Program	Status	Timely Notice Exception	Reason	Run Reason
☑	Homeless - Perm	Pending			
☑	CalWORKs	Pending			

Change Reason | Run EDBC | Cancel

2. On the **Run EDBC** page, select the **<Appropriate Program(s)>** checkboxes
3. Select the **<Months>** from the **Begin Month** and **End Month** drop lists if necessary
   Note: Permanent Homeless Assistance is a one-month program. You should select the BDA month from both the Begin Month and End Month drop lists. If you run EDBC for the month after the month the customer is eligible to Homeless Assistance, that month fails.
4. Click the **Run EDBC** button



EDBC List

Cancel

Display by:

Program: **Type Reason:** **Run Status:** **From:** 09/2020 **To:** 10/2020 View

Search Results Summary **Results 1 - 2 of 2**

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
10/2020		CalWORKs	Regular	Not Accepted	533.00	10/07/2020	Online EDBC Rules
10/2020		Homeless - Perm	Regular	Not Accepted	1,000.00	10/07/2020	Online EDBC Rules

Cancel

5. On the **EDBC List** page, click the **Homeless – Perm** hyperlink to access the Homeless – Perm EDBC page.

Note: When EDBC denies the Homeless Assistance - Perm program, Fail displays in the Auth Amount column on the EDBC List page.

6. Review the EDBC results.

- The Homeless – Perm Applicant Financial Eligibility Test and Homeless – Perm Budget page sections looks similar to the CalWORKs EDBC Summary page
- The Aid Payment page section displays Homeless – Perm specific information
- The Money Management page section displays if the benefits are being issued to a vendor

Note: When EDBC denies the Homeless Assistance - Perm program, the Program Configuration page section displays the Denied status and the appropriate status reason.

If the results are not what you expect, review and edit the data collection pages as necessary and re-run EDBC.

When reviewing the Aid Payment page section the hyperlinks allow you to view pages that display the details for the corresponding calculation.

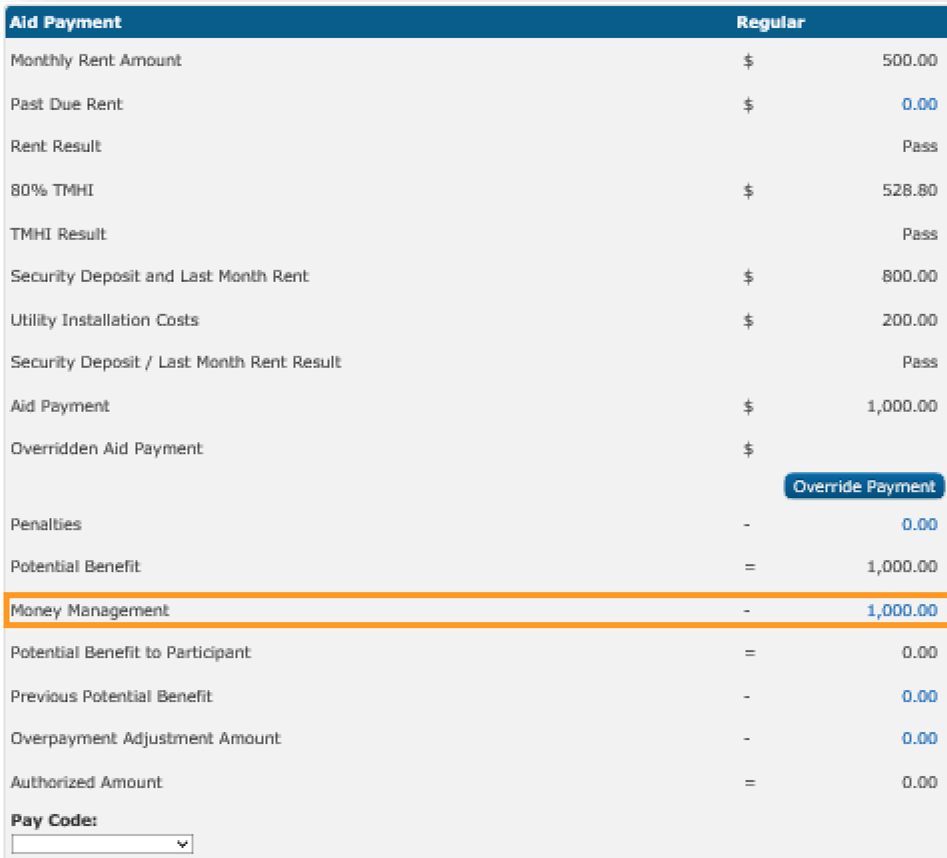
Aid Payment	Regular	
Monthly Rent Amount	$	500.00
Past Due Rent	$	0.00
Rent Result		Pass
80% TMHI	$	528.80
TMHI Result		Pass
Security Deposit and Last Month Rent	$	800.00
Utility Installation Costs	$	200.00
Security Deposit / Last Month Rent Result		Pass
Aid Payment	$	1,000.00
Overridden Aid Payment	$	
		Override Payment
Penalties	-	0.00
Potential Benefit	=	1,000.00
Previous Potential Benefit	-	0.00
Overpayment Adjustment Amount	-	0.00
Authorized Amount	=	1,000.00
Pay Code:		

Delivery Method: *	Immediacy Indicator: *	Issuance Method:
Mail	Rush	

Change Reason | Accept | Cancel

When issuing the Permanent Homeless payment to a vendor(s) the **Aid Payment** page section contains a **Money Management** hyperlink, this link navigates you to the **Money Management EDBC Detail** page which contains the details of the vendor payment(s).

- The amount in the Authorized Amount field does not include the amount issued to the vendor.



Aid Payment	Regular	
Monthly Rent Amount	$	500.00
Past Due Rent	$	0.00
Rent Result		Pass
80% TMHI	$	528.80
TMHI Result		Pass
Security Deposit and Last Month Rent	$	800.00
Utility Installation Costs	$	200.00
Security Deposit / Last Month Rent Result		Pass
Aid Payment	$	1,000.00
Overridden Aid Payment	$	
		Override Payment
Penalties	-	0.00
Potential Benefit	=	1,000.00
Money Management	-	1,000.00
Potential Benefit to Participant	=	0.00
Previous Potential Benefit	-	0.00
Overpayment Adjustment Amount	-	0.00
Authorized Amount	=	0.00
Pay Code:		

The **Money Management** page section displays information for each vendor payment when there are multiple vendors the information for each vendor displays separately.

- The Total Vendor Authorized Amount displays the sum of the amounts for all vendors.

Money Management				Regular	
Vendor	Pay Code	Voucher			
Gas and Electric	Homeless - Applicant	No			
Vendor Potential Amount				$	200.00
Vendor Requested Amount				$	200.00
Vendor Previous Potential Benefit Amount				-	0.00
Vendor Authorized Amount				=	200.00
Magnolia Apartments	Homeless - Applicant	No			
Vendor Potential Amount				$	800.00
Vendor Requested Amount				$	800.00
Vendor Previous Potential Benefit Amount				-	0.00
Vendor Authorized Amount				=	800.00
Total Vendor Potential Amount				$	1,000.00
Total Vendor Requested Amount				$	1,000.00
Total Vendor Previous Potential Benefit Amount				-	0.00
Total Vendor Authorized Amount				=	1,000.00

Delivery Method: *	Immediacy Indicator: *	Issuance Method:
Mail	Rush	

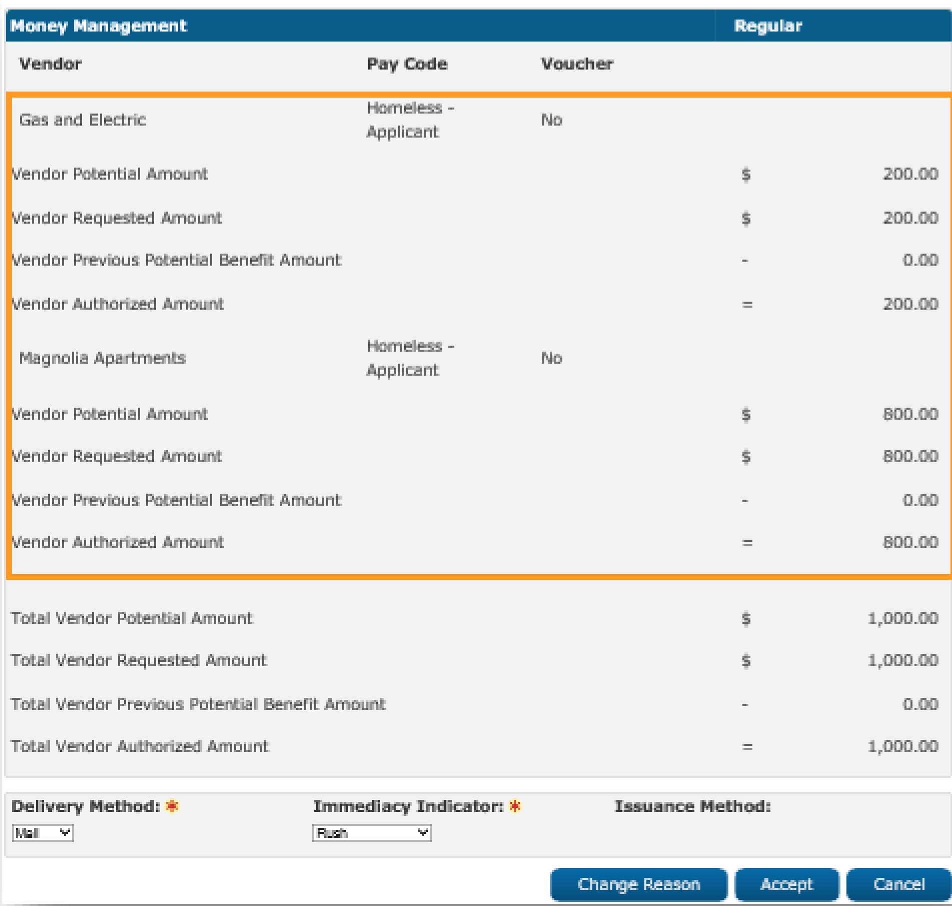
Change Reason | Accept | Cancel

When issuing a voucher, Aid Payment page section displays the same information as it would if issuing the payment directly to the vendor.

The Money Management page section when issuing a voucher displays:

- For each vendor payment. When there is more than one vendor, each vendor displays separately.
- The Voucher field displays **Yes**.
- The Total Vendor Authorized Amount does not include the amounts issued by voucher(s).

Note: See the Homeless Assistance – Voucher Vendor Payment quick guide for information in processing EDBC to issue the vendor payment after the vendor returns the voucher for payment.



Money Management				Regular
Vendor	Pay Code	Voucher		
Gas and Electric	Homeless - Applicant	No		
Vendor Potential Amount			$	200.00
Vendor Requested Amount			$	200.00
Vendor Previous Potential Benefit Amount			-	0.00
Vendor Authorized Amount			=	200.00
Magnolia Apartments	Homeless - Applicant	No		
Vendor Potential Amount			$	800.00
Vendor Requested Amount			$	800.00
Vendor Previous Potential Benefit Amount			-	0.00
Vendor Authorized Amount			=	800.00
Total Vendor Potential Amount			$	1,000.00
Total Vendor Requested Amount			$	1,000.00
Total Vendor Previous Potential Benefit Amount			-	0.00
Total Vendor Authorized Amount			=	1,000.00

Delivery Method: * Mail
Immediacy Indicator: * Rush
Issuance Method:

Change Reason | Accept | Cancel

7. After reviewing the results, accept and save the EDBC. Then, review/generate the Notice of Action(s) and document your actions with a journal entry according to your County procedures.
8. If appropriate, follow your County procedures to add the need and service arrangement and then issue the voucher(s).

After approving Permanent Homeless Assistance, batch completes the following:

- Issues benefits based on the EDBC results
- Creates Permanent Homeless Assistance time track records. The HA20 MEDS transaction is triggered when benefits are issued.
- Discontinues Temporary Homeless Assistance when Permanent Homeless Assistance is issued unless the customer qualifies for an exception