Homeless Assistance – Temporary

This CalSAWS Quick Guide (QG) provides the end-user with functional instructions on Homeless Assistance 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, when Homeless Assistance – Temporary is added to a case the data collection information is entered on the following pages:

- Homeless Assistance Detail – Temporary – used to enter Temporary Homeless applicant information, this information is used by EDBC to determine eligibility
- Homeless Assistance Detail - Temporary – Payments – used to enter payment information for Temporary Homeless assistance, this information is used by EDBC to determine issuance amounts
- Money Management Detail - used when making benefit payments directly to a vendor.
- Payment Amount Used By EDBC page – used in combination with the Money Management Detail page to issue a payment to a vendor
- Living Arrangement Detail – used to enter the customer's housing situation, EDBC uses this data to determine Homeless Shelter deduction and Restaurant Meals eligibility for the CalFresh program

After entering Homeless Assistance data collection information, run EDBC to approve or deny the Homeless Assistance program and issue benefits. A service arrangement can be entered to issue a voucher but, 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 you issue Homeless Assistance benefits.

Homeless Assistance – Temporary Data Collection

The Homeless Assistance data collection pages are accessed from the Eligibility Global navigation bar and the Customer Information Local navigator.

The steps below outline the process:

1. Click the **Homeless Assistance** link in the **Non Financial** section of the **Task** navigation bar to access the **Homeless Assistance List** page. The Homeless Assistance List page displays Temporary and Permanent Homeless Assistance records for the case.
   A. Select **Temporary** from the **Type** drop list
   B. Click the **Add** button to access the **Homeless Assistance Detail – Temporary** page in Add mode

Homeless Assistance List

✱- Indicates required fields

Continue

Display
From: To:

View

Add

Homeless Assistance Type	Begin Date	End Date
No Data Found		

Homeless Assistance Type: ✱ [____ ▾] Add

☐ Complete

Continue

2. Enter Temporary Homeless Assistance information on the **Homeless Assistance Detail – Temporary** page.

   A. **Reason** drop list selection options:
      - Expanded Temp-HA for Victims of Domestic Abuse (Select this reason to allow Expanded Homeless Assistance when CalWORKs is pending)
      - 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
      - Sharing residence with family/friends on temp basis

   B. **Exception** drop list selection options:
      - State/Federal Declared Natural Disaster (Select this only during a state or federally declared natural disaster)
      - Domestic Violence
      - Former Residence Uninhabitable
      - Physical Mental Illness

Homeless Assistance Detail - Temporary

✱- Indicates required fields

Save and Return   Cancel

Type: Temporary

Reason: ✱
[- Select - ▾]

Exception: [____ ▾]

C. When **Expanded Temp-HA for Victims of Domestic Abuse** is selected from the **Reason** drop list the following fields dynamically display:

   - **Sworn Statement Received Date**
   - **Initiate Additional 16 Day Period**

D. When **Yes** is selected from the Initiate Additional 16 Day Period drop list the following fields dynamically display:

   - **Additional Period CW 42 Received Date**
   - **Additional Period Sworn Statement Received Date**

Initiate Additional 16 Day Period: ✱ [Yes ▾]

Additional Period CW 42 Received Date: ✱ [_____] 📅

Additional Period Sworn Statement Received Date: ✱ [_____] 📅

E. The **Prior Misuse of Funds** drop list defaults to No, update if appropriate.

F. In the **CW 42 Received Date** field enter the date you receive the CW 42, Statement of Facts – Homeless Assistance. The System automatically generates the CW 42 when you add the Homeless Assistance program to the case.

Homeless Assistance Detail - Temporary

✱- Indicates required fields   [Save and Return] [Cancel]

Type: Temporary

Reason: ✱
[Expanded Temp-HA for Victims of Domestic Abuse ▾]

Exception: [▾]

Prior Misuse of Funds: ✱ [No ▾]

CW 42 Received Date: ✱ [_____] 📅

Sworn Statement Received Date: ✱ [_____] 📅

Initiate Additional 16 Day Period: ✱ [No ▾]

Note: In CalSAWS, the 12-month period begin date is based on the Homeless Assistance payment begin date.

3. To enter the payment dates for the Temporary Homeless Assistance, click the **Add** button in the **Payments** page section to access the **Homeless Assistance Detail – Temporary – Payments** page in Add mode

4. The **Homeless Assistance Detail – Temporary – Payments** page displays.

   A. Enter the **Payment Begin Date** and **Payment End Date**

Note: If the Payment End Date is more than seven days after the Payment Begin date a validation message ~~displays~~displays, and the record cannot be saved. Add additional payment records when necessary.

5. If you selected Expanded Temp-HA for Victims of Domestic Abuse from the **Reason** drop list on the **Homeless Assistance Detail – Temporary** page, the **Additional 16 Day Period** drop list displays on this page.

Homeless Assistance Detail - Temporary - Payments

✳️- Indicates required fields   [Save and Return] [Cancel]

Payment Begin Date: ✳️   **Additional 16 Day Period:** ✳️
[_____] 📅   [- Select - ▾]

Payment End Date: ✳️
[_____] 📅

Verified:
[____ ▾]

CW 74 Received:
[_____ ▾]

Note: If you selected **State/Federal Declared Natural Disaster** from the **Exception** drop list, the System does not count the days of homeless benefits issued towards first or second 16-day count.

6. CW 74 Received: Allows you to indicate if you received the Permanent Housing Search Document, CW 74. It is not a required field, but you cannot add a second payment record if there is no entry in this field for the first record.

CW 74 Received:
[_____ ▾]

7. Click the **Save and Return** button after completing the appropriate fields

8. The **Homeless Assistance Detail – Temporary** page displays, 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 – Temp** from the **Program** drop list
3. Click the **Add** button to access the **Money Management Detail** page in Add mode

Money Management List

Continue

Display
From: To:
[   ] 📅   [   ] 📅   View
                                                      Add

Vendor Name	Vendor Type	Priority	Start Month	End Month
No Data Found				

Program: * [Homeless - Temp ▾] Add

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.

Money Management Detail

✱- Indicates required fields   [Save and Add Another]   [Save and Return]   [Cancel]

Vendor Name: ✱	Program:	Vendor Type: ✱	Priority: ✱	Voucher:
[Select]	Homeless - Temp	[- Select - ▾]	[- Select - ▾]	[No ▾]

Payment Amount used by EDBC

Amount	Redeemed Amount	Begin Date	End Date	Pay Code
No Data Found				

Add

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. The **Payment Amount Used By EDBC** page displays:
   A. Enter the **Begin Date** and the **Amount** of the payment

B. If you have selected **Yes** in the **Voucher** drop list on the **Money Management Detail** page the **Redeemed Amount** field displays

C. The **Pay Code** drop list is not mandatory but allows you to identify which pay code applies to the payment

Payment Amount Used By EDBC

*- Indicates required fields

[Save and Return] [Cancel]

Pay Code:
[⌄]

Amount: *
[   ]

Begin Date: *
[   ][📅]

End Date:
[   ][📅]

Redeemed Amount:
[   ]

Access the Money Management Detail page in Edit mode to add additional payment amounts for the vendor when necessary.

Note: Although, vouchers are issued through service arrangements according to your County processes, all issuances to vendors and customers are created via EDBC.

Living Arrangements

Data for living arrangements is entered on the Living Arrangements pages.

The steps below outline the process:

1. Click the **Living Arrgmt** link on the **Task** navigation bar
2. The **Living Arrangement List** page displays:
    A. Click the **Add** button to access the **Living Arrangement Detail** page in Add mode

Living Arrangements List

			Continue
▸ Root Questions			
▸ CalHEERS Verifications			

Display
From: To: View
[   ] 📅   [   ] 📅   Add

Name	Type	Arrival Date	Departure Date
No Data Found			
			Add

3. The **Living Arrangement Detail** page displays
   A. Select the customer from the **Name** drop list
   B. Select **Homeless** from the **Living Arrangement Type** drop list, the **Sub Type** drop list dynamically displays allowing you to enter more specific information about the customer's living situation
   C. The **Sub Type** drop list selection options are:
      ✖ Car
      ✖ Street
      ✖ Church
      ✖ Mission
      ✖ Motel/Hotel
      ✖ Room in someone else's house
      ✖ Shelter Facility
      ✖ Skid Row

D. Click the **Save and Return** button

Note: There is a General Assistance/General Relief page section, complete only if appropriate to your customer.

Homeless Assistance – Temporary EDBC

After completing the data collection pages, Run EDBC. The Run EDBC page is accessed from the Eligibility Global navigation bar and the Customer Information Local navigator.

The steps below outline the process:

1. Click the Run EDBC link in the Task navigation bar to access the **Run EDBC** page
2. The **Run EDBC** page displays:
    A. Select the **<Appropriate Program(s)>** checkboxes
    B. Select the **<Months>** from the **Begin Month** and **End Month** drop lists if necessary.
        I. When Running EDBC for the Homeless – Temporary program, the **Begin Month** and **End Month** should be the month they are applying benefits, when the dates cover two months Run EDBC for both months.

C. Click the **Run EDBC** button

Note: If you run EDBC for the month after the month the Customer is eligible to the Homeless Assistance, that month will fail.

3. The **EDBC List** page displays

4. Click the **Homeless – Temp** hyperlink to access the **Homeless – Temp EDBC** page
   Note: When EDBC denies the Homeless Assistance - Temp program, Fail displays in the Auth Amount column on the EDBC List page.
5. The Homeless – Temp EDBC page displays
6. Review the EDBC result.

The Homeless – Temp Applicant Financial Eligibility Test and Homeless – Temp Budget page sections look similar to the CalWORKs EDBC Summary page

The Aid Payment page section displays Homeless – Temp aid specific information

Aid Payment		Regular
Payment Dates		From: 10/03/2020
		To: 10/09/2020
Amount per day	$	85.00
Number of days	x	7
Aid Payment	$	595.00
Combined Aid Payment	$	595.00
Final Aid Payment	$	595.00
Overridden Aid Payment	$	
		Override Payment
Penalties	-	0.00
Potential Benefit	=	595.00
Previous Potential Benefit	-	0.00
Overpayment Adjustment Amount	-	0.00
Authorized Amount	=	595.00

Pay Code:
[_____ ▾]

Delivery Method: ✱	Immediacy Indicator: ✱	Issuance Method:
[Mail ▾]	[Rush ▾]	

[Change Reason] [Accept] [Cancel]

Note: If the results are not what you expect, review and edit the data collection pages as necessary.

The Money Management page section displays if the benefits are being issued to the vendor, when a vendor is receiving the payment the Authorized Amount in the Aid Payment page section will not include the Vendor Authorized Amount

Note: If any information is incorrect, cancel the EDBC. Then, access the Money Management Detail and the Payment Amount Used By EDBC pages to correct the information.

The **Voucher** field displays **Yes** in the Money Management Page section when the Homeless – Temporary payment will be paid to a vendor via voucher

The Total Vendor Authorized Amount does not include the amounts issued by voucher(s) until you run EDBC after the **Redeemed Amount** field **Payment Amount Used by EDBC** page has been entered

When issuing a subsequent Homeless – Temporary payment you will see two budgets in the **Aid Payment** page section

Aid Payment	Regular	Regular
Payment Dates	From: 09/29/2020 To: 10/05/2020	From: 10/06/2020 To: 10/12/2020
Amount per day	$ 85.00	$ 85.00
Number of days	x 5	x 7
Aid Payment	$ 425.00	$ 595.00
Combined Aid Payment		$ 1,020.00
Final Aid Payment		$ 1,020.00
Overridden Aid Payment		$
Penalties		- 0.00
Potential Benefit		= 1,020.00
Previous Potential Benefit		- 0.00
Overpayment Adjustment Amount		- 0.00
Authorized Amount		= 1,020.00

Pay Code:
[⌄]

Delivery Method: ✱   **Immediacy Indicator:** ✱   **Issuance Method:**
[Mail ⌄]   [Rush ⌄]

[Change Reason]   [Accept]   [Cancel]

When you select Expanded Temp-HA for Victims of Domestic Abuse from the **Reason** drop list on the **Homeless Assistance Detail – Temporary** page and enter a 16-day period on the **Homeless Assistance Detail – Temporary – Payments** page all 16 days will be issued and the dates will be included in the Payment Dates in the Aid Payment page section

Aid Payment		Regular
Payment Dates		From: 10/02/2020 To: 10/17/2020
Amount per day	$	85.00
Number of days	x	16
Aid Payment	$	1,360.00
Combined Aid Payment	$	1,360.00
Final Aid Payment	$	1,360.00
Overridden Aid Payment	$	
		Override Payment
Penalties	-	0.00
Potential Benefit	=	1,360.00
Previous Potential Benefit	-	0.00
Overpayment Adjustment Amount	-	0.00
Authorized Amount	=	1,360.00

Pay Code:
[▼]

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

[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).

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.

After approving Temporary Homeless Assistance, batch completes the following:

- Issues benefits based on the EDBC results
- Creates Homeless Assistance time track records for Temporary Homeless Assistance and Temporary Homeless Assistance with exceptions. However, batch only creates Domestic Abuse Assistance time track records when those benefits are first calculated by EDBC
- Sends the HA20 MEDS transaction

- Discontinues Temporary Homeless Assistance after customers receive the allowable number of days within the 12-month period, the 12-month period ends or when Permanent Homeless Assistance is issued