

COLA Mass Change Exception Report

How to Clear an Income Exception

Clearing an **income exception** has never been easier!
Just follow these steps if you would like to clear an income exception **all in one place**.

1 Access the **SSA COLA** tab to find the **End SSA COLA** page.

2 The system will automatically populate a list of clients whose SSA income was not updated with current SSA COLA numbers. The name of the client will be displayed **not the HOH**. This list will be sorted by county. If the **Record Status** is set to **'Pending'**, the record can be processed. If it is set to **'Worked'** it means that the client's income has already been updated and no further action is needed. Worked records will clear when EDDB batch is run overnight as long as authorization is successful.

3 Click on the **SVES Request** button to pull data from SVES without leaving the End SSA COLA page. A message will be displayed to warn you if another user has already done a SVES request for this

4 The **SSA Unearned Income** related list will be displayed on this page. Enter the new amount(s) of the client's income here and **save**. When the record is saved, CBMS will Effective End Date the current record for 12/31 and create a new unearned income record on the client's case(s). You do not need to go to the case or take any other manual actions.

Case ID	Client Name	County	Office	Unit	Record Status	Programs
1B00000	Client, First	Adams	Adams - ASC	Unit	Pending	SNAP, MA
1B00000	Client, Second	Adams	Adams - ASC	Unit	Pending	SNAP, MA
1B00001	Client, First	Adams	Adams - ASC	Unit	Pending	SNAP, CW
1B00001	Client, Second	Adams	Adams - ASC	Unit	Pending	SNAP, CW

SSA Unearned Income					
Date	Type	Gross Amount			
01/01/2023	Social Security Retirement	600.00			
01/01/2023	Social Security Dependent	500.00			

SVES Data					
Report Type	Report Date	Case #	SSN	Individual	
Title II	11/01/2022	1B00000	000-01-0000	Client, First	
Title XVI	11/01/2022	1B00000	000-01-0000	Client, First	

Heads Up!
Make sure you are entering the correct income dollar amount for the correct type of income. If data entry is done incorrectly and saved, you **should go directly to the case and modify the record that has been created**.

Best Practice!
All team members should use the End SSA COLA page for COLA income updates to eliminate duplicate work and significantly reduce the amount of time to do manual COLA updates. If anyone in your county is using the END SSA COLA page, only non income related COLA exceptions should be worked from the Cognos report.



GREAT CONTENT!

Refer to **The SSA COLA Process WBT** for other options to work income COLA exceptions.

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Case Id	Client Name	Exception Reason
Case001	CLIENT001	Case Eligibility Status is in Pending mode
Case002	CLIENT002	Unearned Income not updated by COLA

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Exception Reason	How to Fix
Case Eligibility Status is in Pending mode ELIGIBILITY ERROR - Please validate the effective begin date or data entry on Collect Case Individual window for CWIN xxxxx.0, HPLG CW, Period 201604.0	At least one HPLG is Pending on Display Eligibility Summary page. Go to the case #. Verify the Effective Begin Date (EBD) on Case Individual and Demographics for the CWIN (client id). You may need to also look at Individual Demographics. The EBD/Food Assistance (FA) use months should be the same on both pages. Then Re-run Eligibility Determination Benefit Calculation (EDBC) and online authorize if results are correct.
Case requires supervisory review	This is really due to Supervisory Authorization. Someone with Supervisor security needs to online authorize this case. There are different reasons why a case requires Supervisor Authorization.
Case Needs online Authorization for Burial benefit	Online authorize the case.
ERROR ENCOUNTERED IN AU00255	Most of these are the same as the online 513 error received, usually due to a sanction record having an Effective End Date (EED) Or Medical Assistance (MA) is passing for a pregnancy aid code; however, the pregnancy record has been incorrectly EED'd or deleted. As per shift F1, the pregnancy record should only be end dated when adding a new pregnancy record.
POST AUTHORIZATION UPDATES	Online authorize. A user may be able to authorize or a different error may be displayed online. If issue persists, submit an Help Desk Ticket (HDT).
ELIGIBILITY ERROR - Individual Demographic not loaded for Individual BAD RETURN FROM AA00345 FOR CS_ID: XXXXXXXX AND PROGRAM: MA	This error was "renamed" in June release project 9594.
No error text is provided	Run EDDB and online authorize. If issue persists, submit an HDT.
ELIGIBILITY ERROR - Date of Birth is missing for Individual	Go to Individual Demographics and Case Information (In the Home). EBD on Case Information should not be before the EBD on Individual Demographics.
THE PRIMARY USER COULD NOT BE DETERMINED FOR THE CASELOAD-THE PRIMARY USER MAY HAVE BEEN END DATED Case Eligibility Status is in Suspend mode Authorization process is unsuccessful	Due to one of the workers who a HPLG being assigned to has been EED'd by the Security Administrator, should transfer that HPLG to an active worker. At least one HPLG is in a Suspend status on Display Eligibility Summary page. Correct eligibility if possible. Online authorize. A user may be able to authorize OR a different error may be displayed online. If issue persists, submit a HDT.
ELIGIBILITY ERROR - Please validate the effective begin date or data entry on Collect Case Individual Program for CWIN xxxxx.0, HPLG FS, Period 201601.0	Go to Case Individual/Individual Demographics for the CWIN (client id) for the HPLG for the month provided. Be sure these two pages have the same Use month for that HPLG.
ERROR IN SELECT FROM INDY WHERE CWIN: xxxxxxxx	Online authorize. A user may be able to authorize OR a different error may be displayed online. If issue persists, submit a HDT.
ELIGIBILITY ERROR - Demographic not loaded for Individual	Validate EBD on Individual Demographic. Run EDDB online and online authorize. If issue persists, submit a HDT.

Refer to *The SSA COLA Process WBT* for other options to work COLA exceptions.

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How to Clear Exceptions Not Related to Income Interface

1 Filter the COGNOS report to remove Income Exceptions

2 Select the case and determine the exception reason

3 Take action on the reason

An MUE was present on the case - Use the Exceptions Quick Fix Desk Aid (pictured left) to fix the case based on the unique exception reason

Case Wrap Up - HPLG is marked No or Not Complete. If case is ready to run, change to 'Yes'

Pending VCL - if verification has been received, update data entry to clear VCL

ISM not updated due to current SSA ISM - Review SVES data and update the ISM page with new SSA ISM amount

4 Run EDDB
Review Wrap-Up
Authorize the case

You must online authorize the case to remove the exception from the COLA Mass Change Exception Report

