

## Acceptable Uses of the Refresh Button

### CLOSED PELICAN CASE

ORIGINAL CIS BUDGET OF PELICAN CASE	CURRENT CLOSED CASE CHILD CARE PROGRAM	NEW NEEDED CHILD CARE PROGRAM	ACTION NEEDED
C	TANF C	TANF C	REOPEN & REFRESH
C	*FT/LI/HS/PK	TANF C	REOPEN & REFRESH
C	TANF C	TANF U	PULL NEW CASE
U	TANF U	TANF U	REOPEN & REFRESH
U	*FT/LI/HS/PK	TANF U	REOPEN & REFRESH
U	TANF U	TANF C	PULL NEW CASE
FS	*FS/FT/LI/HS/PK	FS	REOPEN & REFRESH
GA	*GA/FT/LI/HS/PK	GA	REOPEN & REFRESH
None	FT/LI/HS/PK (Not Linked to CIS)	TANF/FS/GA	ASSESS NEW PUSHED CASE
None	*FT (Linked to CIS)	TANF/FS/GA	REOPEN & REFRESH

\* If reopened/refreshed case fails eligibility, see instructions below

### OPEN PELICAN CASE

ORIGINAL CIS BUDGET OF PELICAN CASE	CURRENT OPEN CASE CHILD CARE PROGRAM	NEW NEEDED CHILD CARE PROGRAM	ACTION NEEDED
C	FT/LI/HS/PK	TANF C	REFRESH
C	TANF C	TANF U	CLOSE OPEN CASE & PULL NEW CASE
U	FT/LI/HS/PK	TANF U	REFRESH
U	TANF U	TANF C	CLOSE OPEN CASE & PULL NEW CASE
FS	FT/LI/HS/PK	FS	REFRESH
GA	FT/LI/HS/PK	GA	REFRESH
None	FT/LI/HS/PK (Not Linked to CIS)	TANF/FS/GA	PROCEED ACCORDING TO POLICY & ASSESS NEW PUSHED CASE
None	FT (Linked to CIS)	TANF/FS/GA	REFRESH

#### NOTES:

- The Refresh button does not function like the Refresh button on your Internet browser. The Refresh button performs a Pull with History of CIS data into PELICAN should only be used for the situations listed in the above chart. Gray rows in the chart indicate scenarios where a Refresh should NOT be performed. White rows in the chart indicate scenarios where a case is linked to CIS and a Refresh would be performed. A case linked to CIS is determined by opening the CAO Program Eligibility Page in PELICAN. If a Budget Record exists on this page, the case is linked to CIS.
- It is important to be aware that when a PELICAN TANF, FS or GA case is refreshed, the following occurs:
  - Only active records are applied to PELICAN
    - If a record is inactive (end dated) in CIS and is active in PELICAN, the PELICAN record is deleted during the refresh
  - All records in PELICAN (affected by the refresh for both active and inactive) for the case are deleted and replaced by CIS information
  - All data deleted in PELICAN from the Refresh function can be viewed in History (Note: the CIS Case Summary page will NOT display the information as “Updated” if the record is inactive in CIS because the information was technically not updated in PELICAN: it was deleted)

#### IF ELIGIBILITY FAILS AFTER REOPENING, REFRESHING AND ASSESSING:

Data from CIS may not always transfer into PELICAN when a FT/LI/HS/PK case is reopened and refreshed. This most often occurs when a closed FT/LI/HS/PK case is reopened due to TANF reopening. The Refresh functionality can be affected by the way case ownership is determined in PELICAN. Case Ownership is established in PELICAN based on the last child care program under which eligibility was assessed and confirmed. Once eligibility is assessed and confirmed under TANF/FS/GA, PELICAN reassigns case ownership to CIS.

When reopening and refreshing a FT/LI/HS/PK case, eligibility has not yet been assessed and confirmed under TANF/FS/GA so PELICAN continues to assign case ownership to the CCIS and not CIS.

Follow these steps:

1. Check CIS for CURRENT EMPLOYMENT and TRAINING
2. Manually enter Employment and Training information from CIS that did not update during the initial refresh
3. Assess and Confirm Eligibility
4. If the case is ELIGIBLE, REFRESH the case again (this resolves the case ownership issue, CIS data will now replace PELICAN data and a link to CIS is established)
5. If case is still Ineligible, follow standard procedure