Questions & Answers

CPP Data Match

Original - July 2006

Housekeeping update – July 2008

Prevention and Loss Management Services Branch
Regional Services Division

Ministry of Housing and Social Development

Purpose of this document:

This self-study document is designed to provide information to staff so they can respond to client's inquires regarding CPP income and accurately interpret and input CPP income on client files.

The purpose of this manual is to enable staff to:

- recognize various types of CPP income
- understand confidentiality requirements related to the use of CPP information
- interpret the CPP payment details displayed on the CPP and INC screens
- add CPP income to GA files where the automated process receives insufficient information from Service Canada (SC)
- interpret CPP load reports and override reports
- address client inquires regarding CPP income.
- override the SC reported CPP amount if necessary

Contacts

If you have any questions, comments or suggestions regarding this manual, or the CPP information displayed, please contact:

Leslee Bolin

Wei Sun

Cheryl Mihalcheon

Judy Patience

Marilyn Sigouin

Sandi Shaw

Michael Thorne

Rupinder Deol

Thank you in advance.

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J:\PLMS HQ\Working Folders\Wei\CPP Streamline\CPP Training\CPP Q A's Revision - Updated July 2008.doc

CPP Override Information

CPP Income Code

Q1.   Why can't I update Income Code 11 on the INC Screen any more?

Income Code 11 is automatically generated by MIS based on CPP payment information supplied by SC.

CPP payment amounts are now automatically loaded by the system with a file received directly from SC. CPP payment amounts are displayed by person on the new CPP Q and CPP L Screens and summed for active involvements on the GA file INC Screen as Income Code 11.

If the GA file is a CIHR file, CPP data is not added to the person involved in the file and Income Code 11 not is displayed.

If you need to change the Income Code 11 amount, you can use the override feature on the CPP L screen by entering the Override Amount and an Override Code. As the expectation is that the SC reported amount will be correct, a District Supervisor profile is necessary to override an amount on an ongoing basis. Example 1-A shows an Override Amount of $300 with Override Code 1 which is One-Time override (for more information on Override Codes, please go to Questions 1 8 through 22). The new amount overrides the SC amount and Income Code 11 will be recalculated. See Example 1-B.

```
 Sys: G Scr: CPP Action: L Key: GA00000546


                                                            06JAN10
 XTSA0910                      CPP INCOME (LIST)             16:36:19

 Office ..... N81           File Name ..... G-HARTLEY, HARRY
 Caseload ... N81100        File Status ... OPEN            Comment? ... N
 Class ...... 03 EMPLOY     Category ... 14 1PAR

 CPP Payment Month ........ 2005DEC      Income Code 11 Amt ...   340.00
 CPP Applied to IA Month ... 2006FEB     CPP Tax Exemp ........     0.00

 Cmd: Q=QUERY

                                     Withhold  Reported by -- Override --
 Cmd Name                    SIN    Rel  Amount  Data Match  Amount   Code
     G-HARTLEY, HARRY     700392301  *    50.00      340.00  300.00      1
     G-HARTLEY, MARISE               DTR   0.00        0.00
     G-HARTLEY, MARTIN               SON   0.00        0.00
     G-HARTLEY, MARIA                DTR   0.00        0.00




 1HELP      3EXIT 4MAIL                       9SPLT 10CNCL      12RET
```

Example 1-A

```
 Sys: G Scr: CPP Action: L Key: GA00000546
 GCPPL012C  Override changed. Income code 11 adjusted.
                                                                    06JAN10
 XTSA0910                      CPP INCOME (LIST)                   16:38:12


 Office ..... N81             File Name ..... G-HARTLEY, HARRY
 Caseload ... N81100          File Status ... OPEN           Comment? ... N
 Class ...... 03 EMPLOY       Category ... 14 1PAR


 CPP Payment Month ........ 2005DEC    Income Code 11 Amt ...  300.00
 CPP Applied to IA Month ... 2006FEB    CPP Tax Exemp ........    0.00


 Cmd: Q=QUERY

                                        Withhold  Reported by -- Override --
 Cmd Name                    SIN    Rel  Amount   Data Match  Amount  Code
     G-HARTLEY, HARRY    700392301  *     50.00      340.00   300.00   1
     G-HARTLEY, MARISE              DTR    0.00        0.00
     G-HARTLEY, MARTIN             SON    0.00        0.00
     G-HARTLEY, MARIA              DTR    0.00        0.00




 1HELP      3EXIT 4MAIL                       9SPLT 10CNCL      12RET
```

Example 1-B

Q2.   Should I still use Income Code 29 for CPP retroactive payments?

No.

Do not use Income Code 29 for CPP retroactive payments. The newly loaded CPP payment is automatically loaded to the Lump Sum CPP Amount field on the INC screen. When a CPP payment reduces the person's IA to zero, the CPP payment amount populates the Lump Sum CPP field on the INC Screen in addition to updating income code 11 and turning off cheque production.

Income Code 29 continues to be a valid income code for other Unearned Income.

Q3.   Should I still reduce or override the CPP amount to compensate persons for Public Guardian and Trustee Administration fees?

No.

Do not adjust the CPP income to offset trustee or committee fees. The reported CPP income is an accurate reflection of the amount of Canada Pension Plan benefits that the person received from SC.

New Fields and Processing on INC screen

Q4.   What is the Lump Sum CPP amount on INC screen?

The CPP Lump Sum Amount field is an information field to help workers remember that the person received a large CPP payment.

The Lump Sum Amount field is populated when the CPP Payment uploaded by SC is greater than the person's IA payment. The Lump Sum field will be overwritten by a new CPP payment when that payment amount exceeds the amount already in the field (whether cheque production is on or off). Changes to the field made by the system are recorded in history, and reported in the Case Review List.

Staff can modify this field. There are no edit rules associated with the field. If the worker blanks it out, it will be set to zero. HST records are written when the field is changed by a user.

Q5. Does the CPP Lump Sum Amount include the current month's payment?

The CPP Lump Sum Amount field reflects CPP received in the month the field is populated. It does not include CPP payments received in subsequent months unless those payments are greater than the person's IA payment and greater than the amount already in the field.

Q6. How do I record a lump sum CPP payment that a person tells me about?

If the client confirms that they have received the CPP payment and if this payment is not already reflected on the CPP L screen for the person, record it using a one time override (Override Code 1) on the CPP L screen. This will update Income Code 11. You will also record this amount in the CPP Lump Sum amount on the INC screen.

Do not record the payment based only on notification that the client is eligible for CPP. If you record the payment before the client receives it, the client will be underpaid IA. Provided the client's SIN is recorded on MIS the CPP payment will be uploaded to MIS in the month after the client receives it.

Q7. What is the Income to Apply to LTC amount on INC screen?

This new information field on the INC screen displays the monthly amount of unearned income that is to be used by the person to cover the cost of a long term care facility for LTC cases (Category 05 / Class 21).

The amount equals the sum of the person's unearned income, plus any applicable Victoria Reduction, minus the total of the CPP Tax Exemption amount and amounts in Income Codes 17 (OAS), 27 & 28 (trusts). The amount will be recalculated when any of the income code information is changed. The amount recorded in this field does not impact the payment of any allowances including Comfort Allowances. Staff cannot directly modify this field.

```
 Sys: G Scr: INC Action: U Key: GA00000005


                                                                 03DEC20
 XTSA3679                      INCOME AND ASSETS (UPDATE)         09:18:10

 Office ..... M11          Appl Name ..... G-CARTER, BARBARA
 Caseload ... M11111       File Status ... OPEN       Comment? ... N

 Lump Sum CPP amount ............  1245.00   Family Assets ............     0
 Income to apply to LTC .........   604.73   Discret. Trust Balance ...  1200
 Year-to-Date Income Cd 28 Amt ...       0   Non-discret. Trust Bal ...     0
                                             Non-discret. Trust Tot ...     0
     EARNED INCOME             UNEARNED INCOME        TAX BENEFIT & CREDIT
   Code       Amount          Code      Amount         Code       Amount
    01        11.12            11       454.73
                              12       150.00
                              27       150.00


 Total .....   11.12   Total ..........   754.73      Total .....    0.00
                       CPP Tax Exemp...     0.00
 Amt Ded ...   11.12   Amt Ded .......      0.00       Amt Ded ...    0.00
 1HELP      3EXIT 4MAIL                    9SPLT 10CNCL       12RET
```

Q8. How Do I Apply the LTC amount on INC screen?

The person or their representative is responsible to pay the amount in the 'Income to Apply to LTC' field to the LTC facility. Subtract this amount, along with any earned income, from the long term care facility invoice and authorize a payment to the facility for the remaining amount owed (see examples below). Note: this applies to LTC cases only (Category 05 / Class 21).

If the 'Income to Apply to LTC' amount is less than the LTC invoice, the difference is the maximum amount that the Ministry should pay.

If the 'Income to Apply to LTC' amount is greater than the LTC invoice, the person's excess income plus any earned income should be used to reduce the Comforts Allowance (05 / 15).

Examples

Person A has an LTC invoice of $28.80 * 31 days ($892.80). Their 'Income to Apply to LTC' is $550.00 and there is no other income.	Authorize a payment of $342.80 to the LTC facility and set a Comforts Allowance of $95.00
Person B has an LTC invoice of $28.80 * 31 days ($892.80). Their 'Income to Apply to LTC' is $900.00 and there is no other income.	There is no payment to the LTC facility and set a Comforts Allowance of $87.80 ($892.80 + $95.00-$900.00)
Person C has an LTC invoice of $28.80 * 31 days ($892.80). Their 'Income to Apply to LTC' is $1000.00 and there is no other income.	There is no payment to the LTC facility and set a Comforts Allowance of $0 ($892.80 + $95.00 - $1000.00 = -$12.20, that is, less than$0)
Person D has an LTC invoice of $28.80 * 31 days ($892.80). Their 'Income to Apply to LTC' is $650.00 and their excess income of $300.00.	There is no payment to the LTC facility and set a Comforts Allowance of $37.80 ($892.80 + $95.00-$650.00 - $300.00)

Q9.   The INC, CPP and ALL screens don't always reflect changes to the CPP amount. Why?

The rate recalculation that occurs when the CPP payment information is uploaded will fail if the CPP payment is too high to enable suppliers to be paid.

The following fields will not reflect the correct amount until rate recalculation completes successfully:

- CPP Tax Exemp fields on both the INC Q and CPP L screens
- Amt Ded field on the INC Q screen
- Associated fields on ALL Q screen

The file will be reported on the Case Review List. You must adjust the suppliers **prior to** cut off. If you do not adjust the supplier amounts before cut off, month end processing will make necessary adjustments at cheque run according the existing rules.

CPP L, Q and U Screens

Q10.   What is the CPP L screen and when do I use the screen?

The CPP L screen displays the gross CPP payment made to each active person within a GA file for the current IA month under the heading Reported by Data Match. The CPP L screen also displays any overrides that have been established for a person. The Reported by Data Match is the amount used to calculate income assistance unless the amount has been overridden.

You use the CPP L screen when you need to:

- verify person's CPP income information
- update / override CPP income amount

This screen also displays the withhold amounts for information and discussion with clients only. Tax withholds and other withholds are summed in the Withhold Amount field. Amounts withheld by SC at source are not exempt income.

Q11.   What is the CPP Q screen and when do I use the screen?

The CPP Q screen is a person-based screen that displays the SC Reported CPP payment detail (i.e. CPP benefit type and CPP payment stub information for a specified person). CPP Q will always display the amount of CPP uploaded to the person by the data match process.

CPP payment history will be retained beginning in January 2006. The CPP Q screen will accumulate this history for up to 24 months. Payment history will be available for review by selecting the year and month you are interested in.

Note that there may be multiple payments for a person shown in any month. For example, regular CPP payment information and catch up payment information.

You use the CPP Q screen when you need to review a person's detailed CPP payment stub information for a specified month.

This screen also displays the withhold amounts for information and discussion with the specific person only (refer to Question 55 regarding confidentiality requirements). Tax withholds and other withholds are summed in the Withhold Amount field. Amounts withheld by SC at source are not exempt income.

```
 Sys: G Scr: CPP Action: Q Key: 00001179

                                                             06JAN10
 XTSA0910                     CPP INCOME (QUERY)              16:38:44

 Name ... G-HARTLEY, HARRY          CPP Applied to IA Month ... 2006FEB

 CPP Payment Month .......  2005DEC    Override Amount .......   300.00
 Reported by Data Match ...  340.00    Override Code ......... 1  ONE TIME
                                       Override Start Date ...    N/A

 Pmt Payee Name                    ----- CPP Benefit -----  Withhold Effectve
  #                                Type   ID       Amount    Amount   Date
  1  MR HARRY HARTLEY              DSB 700392301   100.00     50.00  2005MAY
                                   DCC MARIA        50.00            2005SEP


  2  MR HARRY HARTLEY              DSB 700392301   190.00      0.00  2005MAY


  1HELP      3EXIT 4MAIL                       9SPLT 10CNCL      12RET
```

Q12.   What does an '*' beside a CPP payment record on the CPP Q Screen indicate?

An '*' beside a CPP payment record indicates that the record was recorded manually by Prevention and Loss Management Services staff. A small number of the CPP payment records received from SC cannot upload to MIS automatically. These CPP payment records are recorded manually by PLMS staff in the month they are first received and are managed systematically in subsequent months. Refer to Question 28 for additional information on this process.

Q13.   What is the CPP U screen and when do I use this screen?

The CPP U screen is used to remove a manually placed CPP payment record from a specified person for the current month. This screen is only available to staff with DS or IO profiles. Type an 'x' over the '*' to remove the record from the person. It is anticipated that only designated data match IOs will use this screen.

The '*' beside the payment record indicates that the CPP payment record was recorded manually by Prevention and Loss Management Services staff and subsequently managed systematically by the "match unplaced payments" batch job. Only records denoted with an '*' can be removed.

Adjustments to CPP payment records without an '*' are made using the Override function. Please refer to Questions 18 through 22 for information on Overrides.

```
 Sys: G Scr: CPP Action: U Key: 00001179


                                                              05JUN13
  XTSA4329                       CPP INCOME (UPDATE)           09:34:24

  Name ... G-HARTLEY, HARRY          CPP Applied to IA Month ...  2005JUL

  CPP Payment Month ........  2005MAY     Override Amount .......   300.00
  Reported by Data Match ...   340.00     Override Code ......... 1  ONE TIME
                                          Override Start Date ... 2005JUN13

  Place Payee Name                    ----- CPP Benefit -----  Withhold Effectve
  Type                                Type   ID       Amount    Amount  Date
       MR HARRY G-HARTLEY             DSB 700392301   250.00     50.00  2004SEP
                                      DCC MARISE        50.00           2003DEC

   X   MR HARRY G-HARTLEY             DCC MARIA         40.00      0.00  2005JAN




 1HELP      3EXIT 4MAIL                        9SPLT 10CNCL       12RET
```

Note: **BOLD** indicates an updateable field.

Q14.   What is the Withhold Amount on the CPP L and Q screens?

The Withhold Amount field is an information only field. SC may withhold an amount from a person's CPP payment for redirection to a third party.

This may occur if a person requests that an amount be withheld for income tax or if SC received a Garnishing Order. The Withhold Amount on the CPP L and CPP Q screens is the sum of any Voluntary Tax Withhold and Other Withhold applied by SC. Withhold amounts are not exempt income (**legislative reference Section 1(b) and Section 6 to Schedule B of the EA and EAPWD Regulations**). The '*Reported by Data Match*' amount displayed on the CPP L screen includes the withheld amount and is the amount used to calculate income assistance unless it has been overridden for some other reason (refer to Questions 18 through 22 for information on Overrides).

Note: Service Canada recovers past CPP overpayments via a monthly deduction. This overpayment recovery is not reported to MHSD (it is not considered a withhold). MHSD would have considered the income in the month the client received the overpayment (or considered it in their assets when they applied for IA if they received the overpayment prior to coming onto IA) and therefore it should not be added to the CPP amount reported by the data match when calculating IA entitlement even if the client advises you of this deduction.

Q15.   Why is the amount a person shows me from SC on his/her bank statement / CPP cheque stub less than the Income Code 11 amount on the CPP L and INC screens?

The amount that is shown on the bank statement or on the CPP cheque stub is the net CPP amount that the client received (the gross CPP payment less any withhold amount).

In the example below, the Income Code 11 gross amount is $340 and the withhold amount is $50. The amount on the bank statement or cheque stub would be $290. The "*Reported by Data Match*" field on the CPP L screen displays the gross CPP amount ($340 in this example) which is the amount used to calculate income assistance. Amounts included in the '*Withhold Amount*'; field are not exempt income (**legislative reference Section 1(b) and Section 6 to Schedule B of the EA and EAPWD Regulations**).

```
Sys: G Scr: CPP Action: L Key: GA00000546

                                                                   06JAN10
 XTSA0910                        CPP INCOME (LIST)                 16:36:19

 Office ..... N81            File Name ..... G-HARTLEY, HARRY
 Caseload ... N81100         File Status ... OPEN          Comment? ... N
 Class ...... 03 EMPLOY      Category ... 14 1PAR

 CPP Payment Month ........ 2005DEC      Income Code 11 Amt ...   340.00
 CPP Applied to IA Month ... 2006FEB      CPP Tax Exemp ........     0.00

 Cmd: Q=QUERY

                                         Withhold  Reported by -- Override --
 Cmd Name                     SIN    Rel   Amount   Data Match   Amount  Code
     G-HARTLEY, HARRY      700392301  *     50.00      340.00
     G-HARTLEY, MARISE                DTR    0.00        0.00
     G-HARTLEY, MARTIN                SON    0.00        0.00
     G-HARTLEY, MARIA                 DTR    0.00        0.00




 1HELP      3EXIT 4MAIL                        9SPLT 10CNCL      12RET
```

Q16.   What if the client disagrees with the CPP payment amount (Income Code 11) reflected on the INC and CPP L screens?

Instruct the client to provide you with verification from Service Canada if they disagree with the amounts uploaded.

1. The person may have under reported the CPP they received (they may forget to include the Withhold Amount, a retroactive amount, or an amount that they are receiving for a child, etc).

2. The person may have reported additional CPP they received (they may be receiving CPP from a contributor SIN that is unknown to MIS, they may be receiving CPP through SC's International Agreements System (people who have federal pensions from two other countries plus Canada) or they may be receiving CPP for an individual for whom no SIN information was provided).

Note: CPP payments are income to the GA file on which the payment recipient / beneficiary is open regardless of how they spend or distribute the money. SC rules stipulate that SC will only pay Child of Disabled Contributor (DCC) or Orphan (ORP) benefits to the person with control and custody of the child. If payment is going to an adult who no longer has control and custody of the child it is still income to that adult's file. The person must report the change to SC so that SC can redirect future payments appropriately.

Q17.   What action do I take when the amount reported by the person on the EIA81 is not the same as the uploaded amount?

The payment information reported by the person should be compared to the data displayed on the CPP L and Q screens.

In the event that the person has under reported, the SC payment information should be reviewed with the client to verify that they received the payments as reported by SC. Amounts withheld by SC, including income tax and garnishments, are not exempt income. These withholds must be included as CPP income on the person's GA file.

In the event that the person has received and reported more CPP than SC indicates, their CPP payment information should be reviewed to verify the correct CPP payment amount. Use the 'Override Amount' and 'Override Code' fields if the self-reported amount is correct to record the CPP amount the person is actually receiving.

Amounts deducted by SC for recovery of past CPP overpayments are not considered income in the month the money is recovered by SC.   These CPP benefits were already considered as income in the month they were paid to

the client. The amount reported by Data Match displayed on the CPP L screen is the amount used to calculate income assistance. No override should be used in this situation.

For more information on Override Code "1", please refer to Question 18 and for Override Code "M" please refer to Question 20.

Q18. When do I use Override Code 1 (One Time)?

To record CPP when no payment information is reported by SC or when you want to record a temporary (1 month) variation in the CPP payment reported by SC.

1. If a person reports CPP income that MHSD doesn't get a record for (i.e. a CPP payment out of a contributor SIN that is unknown to MIS), record the CPP on the CPP L screen with an Override Code 1.

   At the next CPP upload:

   ▪ If a CPP payment record is received from SC, the associated override amount will be replaced on CPP L and in income 11 by the amount uploaded by SC.

   ▪ If no CPP payment record is received from SC, MIS converts Override Code '1' (one-time override) to Override Code 'R' (rolling override). The CPP amount will continue to roll forward, month after month if no SC CPP payment record is received.

2. If there is an SC reported amount in the current month but the person proves that they did not receive the amount reported by SC, record the client declared CPP on the CPP L screen with an Override Code 1.

   At the next CPP upload:

   ▪ If a CPP payment record is received from SC, the associated override amount will be replaced on CPP L and in income 11 by the amount uploaded by SC.

   ▪ If no CPP payment record is received from SC, the override code and amount will not roll forward (the client stopped receiving CPP).

Q19. What is Override Code R (Rolling)?

A system-generated conversion of Override Code 1.

▪ The system will convert an Override Code 1 to an Override Code R at the next upload if a worker enters client reported CPP income on the AP3 or CPP L screens and there is no record from SC for that person. The Override Code 1 is a one month override and any SC reported CPP payment amount will replace it.

Income code 11 amounts on GA files at initial upload of the electronic data match will be assigned to the primary applicant on the file with an Override Code R if no SC record is received for any active involvement on the file. It is possible that the person is receiving CPP that is not reported to MHSD (see Question 26 for reasons CPP payments may not be reported to MHSD) or that Old Age Security was miscoded as income code 11 on MIS (OAS should be income code 17).

Workers can change the override amount associated with the Override Code R. The new amount will roll forward in subsequent months.

It is important to review the CPP Override Report each month.

Q20. When do I use Override Code M (Monthly)?

Override Code M is used to override existing SC reported CPP payments. A DS will use Override Code M when the person has demonstrated that they are receiving an amount from SC on an ongoing basis that is different to the amount SC reported to MHSD.

> **Caution** should be exercised in using this code because the CPP amount associated with a code M will not be replaced by any subsequent upload from SC including retroactive (Lump Sum) payments.

A DS will also use override code M to reduce reported CPP for people who are grandfathered by the Tribunal Ruling regarding former Schedule C, Section 2(1)(l) (Nutritional Supplements).

Another appropriate use of override code M is to override a CPP benefit paid directly to a caregiver on behalf of a CIHR child (See Question 37).

When code "M" is entered, a warning message "Upload CPP pymts, (including Lump Sums) will not apply to (Client Name)" will be displayed on the screen.

It is important to review the CPP Override Report each month to ensure that the override is still appropriate.

> **Note:**
>
> Do **not** use override code M to record person's annual CPP COLA increase. The February upload of January CPP payment information will correctly capture the increased CPP amount each year.

Q21.   What is Override Code P (Combined)?

A system-generated code indicating that the CPP reflects the result of a person combine transaction.

When a person combine occurs, CPP amounts on both client files are summed. The P override code can only be removed by a DS once the CPP amount has been verified with the person.

Workers should not adjust the person's CPP amount by changing the override amount associated with the Override Code P. Once the correct CPP amount is verified, the Override Code P should be removed by a DS and the correct amount should be entered as a Override Code 1 (which will roll forward if no subsequent SC CPP payment record is received).

It is important to review the CPP Override Report each month.

Q22.   How do I remove an override amount and an override code?

An EAW can remove Override Code '1' or 'R', by blanking out the 'Override Code' and 'Amount' field.

A DS or IO can remove override codes '1', 'R' 'M' or 'P'.

Note that both the Override Amount and the Override Code must be blanked out to remove an Override. If only the 'Override Amount' is blanked or zeroed out, the override amount will become 0.

MIS will remove Override Code '1' or 'R' if a CPP payment record is received. MIS will remove Override Code 'M' if a CPP payment record is not received.
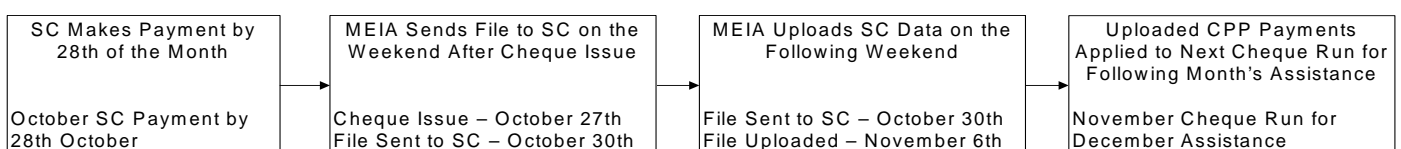
Income code 11 is always recalculated for the file if override amounts are changed.

CPP Upload Processing

Q23.   How does the timing of the CPP payment upload affect the client's IA payment?

CPP is paid by SC at the end of each month for the current month (for example, SC pays October CPP to their clients at the end of October). These CPP payments are uploaded onto MIS 10 days after IA cheque issue and applied to the next cheque run to impact the following month's assistance.

For example:

SC Makes Payment by 28th of the Month	MEIA Sends File to SC on the Weekend After Cheque Issue	MEIA Uploads SC Data on the Following Weekend	Uploaded CPP Payments Applied to Next Cheque Run for Following Month's Assistance
October SC Payment by 28th October	Cheque Issue – October 27th File Sent to SC – October 30th	File Sent to SC – October 30th File Uploaded – November 6th	November Cheque Run for December Assistance

Q24. How will I know which GA files are impacted by the CPP data match?

See CPP Reports (Questions 43 and 44)

Q25. Are there any situations where a person would <u>not</u> have received a CPP payment as reported in the upload by SC?

On very rare occasions, SC may pull a payment after the SIN match but before the cheque is mailed/EFT'd.

If the person has provided an incorrect SIN to MHSD, they may receive an SC record for that incorrect SIN.

It is the client's responsibility to provide evidence of this if they claim it has occurred.

Q26. Are there any situations where a person would receive an SC payment that is not reported to MHSD on the data match?

Yes.

This will occur if:

- the person was not an active involvement on a file or was CIHR at the time MHSD extracted the list of SINs to send to SC, or

- if MHSD does not have the person's SIN # recorded on MIS, or

- if SC makes a payment and does not report the IA client's SIN # in the payment record, or

- if SC makes the payment through their International Agreements System (people who have federal pensions from one or more other countries plus Canada) or,

- SC makes a CPP payment out of a separate cheque issue system (similar to MHSD's imprest cheque system). This rarely occurs.

Utilize the override function in CPP L to record these client reported CPP Payments. For more information on Override Code "1", please refer to Question 18 and for Override Code "M", please refer to Question 20.

Q27. How is the annual CPP COLA increase taken care of?

The February upload of January CPP payment information will correctly capture the increased CPP amount each year.

Overridden amounts are automatically increased by the COLA percentage as part of the February upload.

Q28. What is the Match Unplaced Payments batch job?

This job is part of the electronic upload of CPP data onto MIS.

Some CPP payment records received from Service Canada do not contain sufficient information for the records to upload onto MIS according to the data match SIN based rules. PLMS staff manually place these records in the month they are first received by MHSD. The Match Unplaced Payments job matches CPP payment records to records MHSD has manually placed previously using the combination of Contributor SIN, Payee Name and Stub Count to apply the payment to a Person ID on MIS. Refer to Questions 46 through 51 for more information regarding this process.

Recording CPP When a Person is Added to a GA file

Q29. How do I record CPP reported by a person upon application or reapplication?

Enter CPP income information on the AP3 screen when taking a new application.

OPN will calculate Income Code 11 based on the CPP income entered on AP3 and any current CPP payment information reported by SC for an involvement on the file:

- If a CPP Amount has been added on the Application Income (AP3 U) screen and there is no SC CPP payment record for the current IA month, the system will record the AP3 amount to the "Override Amount" field on CPP L with an Override Code 1. The system will check this for each person on the file.

- If any person on the file has an SC CPP payment record for the current IA month the CPP income reported on AP3 U will not be copied to CPP L. The SC information is considered to be correct. A message will be displayed on OPN U to request the EAW to verify the CPP Income on the CPP L screen. The INC Screen will reflect the SC CPP payment amount.

- If the person has CPP income with an override code in effect, the CPP income from AP3 will not be copied. The override amount is considered to be correct.

- If the person has an override on file but no SC CPP payment record, the override amount is considered to be correct.

If you did not record CPP income on AP3 for the person, use the Override Amount and Override Code 1 on CPP L to record the person's CPP payment information. MIS will roll the CPP payment information that you entered forward if no record is received from SC in subsequent months.

For more information on Override Code "1", please refer to Question 18 and for Override Code "M" please refer to Question 20.

If a client reports a Lump Sum CPP payment, ie. retroactive payment, that is not reflected on MIS, enter this amount manually on both the CPP L (override) and Lump Sum Amount fields.

Q30.   How do I add another individual's CPP payment information on the CPP L screen when adding a person to the file?

Add the individual to the GA file through the PER screen as usual.

Use the CPP L screen to enter the person's reported CPP income (override code 1). For more information on Override Code "1", please refer to Question 18 and for Override Code "M" please refer to Question 20.

Q31.   What happens when a person moves from one file to another?

A person's CPP income will move with them to the new file. Overrides are included in the move.

Removing CPP When a Person is Stopped on a GA file

Q32.   What happens when a person is stopped on a file?

When the person is stopped on a file, the person will not display on the CPP L screen and their CPP income will be subtracted automatically from Income Code 11.

The stopped person's CPP will remain on their person based CPP Q screen for 24 months. If there is a CPP Lump Sum Amount on the INC Screen that is associated with this person you will have to remove it manually (failing to do so will not impact the Income code 11 calculation or the client's IA payment amount but may be misleading if a worker is considering that information to determine the eligibility of the remaining people on the file).

Q33.   What happens when the person is stopped and then comes back onto IA within the same month?

When the person is stopped on a file, the person will not display on the CPP L screen and their CPP income will be subtracted automatically from Income Code 11.

If they come back onto IA in the same month, the person's CPP will automatically be added back into the new / updated file.

Q34.   What happens when the person is stopped and then comes back onto IA in a different month?

When the person is stopped on a file, the person will not display on the CPP L screen and their CPP income will be subtracted automatically from Income Code 11.

If they come back onto IA in a different month, verify their CPP income (review CPP Q screen) and record the amount using either AP3 or the override function on CPP L screen. MIS will roll the CPP payment information that you entered forward if no record is received from SC in subsequent months. A CPP payment record received from SC in a subsequent month will replace the override.

CIHR Files

Q35.   Why can't I add CPP data to CIHR files?

CPP income is not deducted from CIHR benefits.

CIHR files are excluded from the data match between MHSD and SC. CIHR payment records may still be provided to MHSD even if not requested. This can occur because the CPP payment record is based on the contributor's SIN and the contributor may be an active involvement on a non-CIHR file. CIHR payment records are not placed on the GA file where the child is attached and do not appear on the CPP L or INC Screens.

Q36.   What action do I take if CPP income has already been uploaded to a person that becomes CIHR later in the month?

You don't need to do anything.

Once the new CIHR file is created, no further CPP income will be added to or uploaded to the file.

Q37.   What action do I take if a CIHR child's CPP benefit is paid directly to their caregiver?

SC considers caregivers 'equivalent to parents' if the caregiver has court awarded custody and control of the child. A disabled 'equivalent to parent' caregiver may be eligible to receive DCC benefits for the child based on their own CPP contributions. These DCC benefits may be paid to the caregiver on behalf of the child along with their own DSB payment. If the caregiver is on IA and the child is in a CIHR file, it is necessary to reduce the caregiver's CPP amount by the DCC benefit using override code M.

OAS/GIS

Q38.   Is OAS/GIS included in the electronic data match?

No.

There is no data matching on Old Age Security or Guaranteed Income Supplement.

Q39.   Will MIS require Income Code 17 (OAS) to be entered when CPP Data is electronically uploaded to a file that is status 'O'?

No.

However, when you manually enter income other than CPP on the INC screen, the system will look for status "O" clients on the file and will require you to enter the OAS/GIS amount if it isn't already entered.

Person Combined

Q40.   What happens to CPP income when a Person Combine transaction occurs?

The two individuals' CPP amounts are summed on the resulting combined person file.

The CPP L screen will display the combined CPP amount with an Override Code P (Person Combined). The P override code can only be removed by a DS once the CPP income amount has been verified with the client.

- If the combined amount is correct, DS can simply remove the override code "P"
- If the combined amount is incorrect, first replace the override code "P" with code "1"(refer to Question 18) or "M" (refer to Question 20), and then enter the correct amount.

Q41.   What happens if the Person Combined CPP Income is too high to pay suppliers?

If a Person Combined transaction results from a change to the PER screen and the combined income is too high to pay suppliers, the rate recalculation will fail and the Person Combine transaction will not complete successfully.

If this occurs, it is necessary to consult the client to ensure the accurate CPP amount is indicated on CPP L screen. It will be necessary to adjust the suppliers on file if the correct CPP amount is too high.

Suppliers on Files with CPP

Q42.   What action do I take if the CPP amount is too high to allow payment to suppliers?

Electronic CPP Upload Process:

The electronic upload process will record the CPP payments on the file.

The rate recalculation will fail if the CPP payment is too high to enable suppliers to be paid. The following fields will not reflect the correct amount until rate recalculation completes successfully:

- CPP Tax Exempt fields on both the INC Q and CPP L screens
- Amt Ded field on the INC Q screen
- Associated fields on ALL Q screen

The file will be reported on the Case Review List.

Please make sure you adjust the suppliers **prior to** cut off. If you do not adjust the supplier amounts before cut off, month end processing will make necessary adjustments at cheque run according the existing rules.

> **Note**: It is not necessary to remove (override to zero) the CPP income on the CPP L screen to adjust suppliers.

Manual placement of CPP payment records by PLMS Staff:

If the CPP income is too high to enable suppliers to be paid, PLMS staff must remove the suppliers before MIS will enable them to place the CPP record manually.

CPP Reports

Q43. How will I know which files are impacted by the upload of CPP?

You review the Case Review List and the CPP Override Report available on Report to Web.

See the table below for detailed information about each report.

Q44. What kinds of CPP reports will we receive?

The following monthly reports are automatically generated based on the data within MIS:

Title	Description	Format	Review by
Control Totals	This report provides counts of records processed		IMB
Case Review List	This report supplies information about GA files where: ▪ IA is reduced to $0 because of the change in CPP income reported in the data match (Cheque Production turned off) ▪ IA is reduced or increased by more than the threshold amount because of CPP payments (currently set to report IA increased by more than $2 or reduced by more than $30) ▪ CPP income is too high on administered files causing the rate recalculation to fail ▪ CPP benefits were paid to an estate	Report to Web	EAWs
Unplaced SC records	This report supplies information about records that could not be placed during upload because the record: ▪ Has unknown or conflicting SIN information (SIN) ▪ Is unknown – insufficient data exists to place the record (UNK)	Report to Web	PLMS
CPP Override Report	This report supplies information about CPP payments that were overridden by EAWs (override code 1) and DSs (override code 1 or M) and by MIS (override code R or P).	Report to Web	EAWs PLMS
CPP Data Match Performance	This report supplies information of a statistical nature to show the effectiveness of the CPP data match process.	MARS	PLMS SPRB
Unplaced Payments Report	This report supplies information about records that could not be placed during upload because the record: ▪ Has unknown or conflicting SIN information (SIN) ▪ Is unknown – insufficient data exists to place the record (i.e. the CPP payment stub identifies only a first name) (UNK)	Report to Web	PLMS

Tribunal Ruling Schedule C

Q45.   What should be done if the person is former Schedule C?

A DS will use override code M to reduce reported CPP for people who are grandfathered by the Tribunal Ruling regarding former Schedule C, Section 2(1)(l) (Nutritional Supplements).

Manual CPP Record Placement

The Match Unplaced Payments batch job is part of the electronic upload of CPP data onto MIS.

Some CPP payment records received from Service Canada do not contain sufficient information for the records to upload onto MIS according to the data match SIN based rules. PLMS staff manually place these records in the month they are first received by MHSD. The Match Unplaced Payments job matches CPP payment records to records MHSD has manually placed previously using the combination of Contributor SIN, Payee Name and Stub Count to apply the payment to a Person ID on MIS.

Q46.   How can I tell if a CPP payment record was placed manually by PLMS staff and/or subsequently managed by the Match Unplaced Payments batch job and not by the regular CPP upload process?

Manually placed payments will appear on the CPP Q screen with an '*' beside them.

Q47.   How do PLMS staff manually place a record that appears on the CPP Unplaced Payments List (CPU L)?

Refer to Question 51 - What is the CPU U screen and when do I use this screen?

Q48.   How do I remove a record that was placed manually?

Refer to Question 13 – What is the CPU U screen and when do I use this screen?

Q49.   What is the CPU L screen and when do I use this screen?

Access to CPU L is restricted to staff with either DS or IO profiles. It is anticipated that only designated data match IOs will use this screen.

The CPU L screen displays the unplaced CPP payment records for the current CPP Applied IA Month. Type a Q beside the client's name to query the CPP payment stub details. PLMS staff type a U beside the client's name to assign the payment to a person or to change the unplaced payment status.

PLMS staff can select the specific Unplaced Status or Unplaced Reason in the key field to filter the list.

If neither the status or reason are selected:

All status codes and all reason codes except CIHR will be displayed. The list is sorted by Status Code and Payee Name.

Unplaced Status is blank, reason is non-blank:

Records with reason code specified and all statuses except CIHR will be displayed. The list is sorted by Status Code and Payee Name.

Unplaced Reason is blank, status is non-blank:

Records with status code specified and all reason codes except CIHR will be displayed. The list is sorted by Reason Code and Payee Name.

Both are non-blank:

Records with status code and reason code specified will be displayed. The list is sorted by Payee Name.

Records with reason or status 'CIHR' will only be displayed when specifically requested (by entering the code for CIHR in the reason or status field in the Key).

```
Sys: G Scr: CPU Action: L Key:  ; ;

                                                      05JUN13
XTSA4329                 CPP UNPLACED PAYMENTS (LIST)          09:34:24

Cmd: Q=QUERY, U=UPDATE                  CPP Applied to IA Month ... 2005JUL

                                        Gross    ----- Unplaced -----
Cmd  Payee Name                         Amount  Reason     Status
 _    MISS ANDREA G-HARTLEY             195.96  UNK        RVW - RTD
 _    MISS CANDACE G-IRWIN             195.96  UNK        RVW - RTD
 _    MISS JENNIFER MARYANNE JANE G-WILLIAMSON  400.00  SIN        RVW - RTD
 _    MISS MARIA G-WILSON               199.00  UNK        RVW - NEW
 _    MR ANDREW JAMES G-JONES           200.00  SIN        RVW - NEW
 _    MR HARRY G-HARTLEY                300.00  UNK        RVW - NEW
 _    MS EVELYN G-JACKSON               195.96  UNK        RVW - NEW
 _    MS MARISE G-HARTLEY               195.96  SIN        RVW - NEW
 _    MS MARISE G-HARTLEY               195.96  SIN        RVW - NEW
 _    MS NANCY G-OWENS                  195.96  UNK        RVW - NEW
 _    THE PUBLIC TRUSTEE OF BC          195.96  UNK        RVW - NEW
 _    MISS RACHEL G-ANDREWS             350.00  SIN        UNPLACED
 _    MR MARTIN G-PETERS                728.00  UNK        UNPLACED

   1HELP      3EXIT 4MAIL               8FWD 9SPLT 10CNCL       12RET
```

Q50.   What is the CPU Q screen and when do I use this screen?

Access to CPU Q is restricted to staff with either DS or IO profiles. It is anticipated that only designated data match IOs will use this screen.

The CPU Q screen is used to display the unplaced CPP payment record detail. It is accessed by entering 'Q' beside the Payee Name on CPU L. It is not possible to go directly to CPU/Q without going to CPU/L first. However, you can switch from CPU/Q to CPU/U without returning to CPU/L.

```
 Sys: G Scr: CPU Action: Q Key: 2005JUL;06;


                                                              05JUN13
 XTSA4329                 CPP UNPLACED PAYMENT (QUERY)         09:34:24

 CPP Payment Month .. 2005MAY      Contributor SIN ....... 726-123-456
 Unplaced Reason .... B SIN        Originating File ID ... GA12345678
 Unplaced Status .... A RVW - NEW  Address Locator ....... 20


 Payee Name                   ----- CPP Benefit -----  Withhold Effectve
                              Type  ID        Amount    Amount  Date
 MR HARRY G-HARTLEY           DSB 700392301   250.00     50.00  2004SEP
                              DCC MARISE        50.00           2003DEC








  1HELP       3EXIT 4MAIL                    9SPLT 10CNCL       12RET
```

Q51.   What is the CPU U screen and when do I use this screen?

Access to CPU U is restricted to staff with either DS or IO profiles. It is anticipated that only designated data match IOs will use this screen.

The CPU U screen is used to either assign the payment to a person or change the unplaced payment status.

The screen is accessed by entering 'U' beside the Payee Name on CPU L.

To assign a payment to a person, use the copy/paste function to enter the Person ID of the person to whom the payment belongs.

If the person is active on a CIHR file, an error message will be issued and the payment is not placed.

If the person is active in one GA file, income code 11 will be updated on the file and a rate recalculation will be performed. A history comment will be recorded under INC.

If the person is active in more than one GA file income code 11 is updated in all affected files. As above, HST will be updated to reflect the income change. A message is issued to indicate that the person is active on more than one file.

```
Sys: G Scr: CPU Action: U Key: 2005JUL;000006;

                                                           05JUN13
  XTSA4329               CPP UNPLACED PAYMENT (UPDATE)           09:34:24

  CPP Payment Month .. 2005MAY     Contributor SIN ....... 726-123-456
  Unplaced Reason .... SIN         Originating File ID ... GA12345678
  Unplaced Status .... A RVW - NEW   Address Locator ....... 20    Comment? ... N


  Payee Name                 ----- CPP Benefit -----  Withhold Effectve  PERSON
                             Type  ID       Amount    Amount   Date       ID
  MR HARRY G-HARTLEY         DSB 700392301  250.00     50.00  2004SEP _____
                             DCC MARISE      50.00            2003DEC








   1HELP        3EXIT 4MAIL                    9SPLT 10CNCL        12RET
```

Note: **BOLD** indicates an updateable field.

CPP Related Information

Q52.   Where can I obtain additional information regarding CPP Benefits?

Please visit the Government of Canada Web Site at:

http://www.sdc.gc.ca/en/isp/cpp/cpptoc.shtml

Q53.   Under what authority does the ministry obtain CPP payment information?

The Consents signed by the client on the Employment and Assistance application enable the ministry to request CPP payment information from the federal government under the ministry's Information Sharing Agreement with the Human Resources Development Canada (now Service Canada).

Q54.   What is the CPP Benefit Type on CPP Q Screen?

The CPP benefit type is a three character code supplied by SC that provides a brief description of why the person is receiving this payment.

The following table (T8E) provides further information on the benefit type codes.

CPP Benefit Code	Short Description	Long Description
ASG	ASSIGNED	Pension Splitting Assignment
DCC	CHILD	Child of Disabled Contributor
DSB	DISABILITY	Disability Benefit
DTH	DEATH	Death Benefit
ORP	ORPHAN	Orphan of Deceased

CPP Benefit Code	Short Description	Long Description
RTR	RETIREMENT	Retirement Benefit
SVR	SURVIVOR	Survivor

Q55.   Can I disclose a person's CPP information to their spouse?

CPP information cannot be shown to a spouse without the prior consent of the other spouse.

When there is a spousal situation, each person must be informed about the exchange of information between SC and MHSD, the purpose of the agreement (to assess eligibility for Employment and Assistance), and the confidentiality provision. The person needs to be individually questioned as to whether or not they assent to discussing their CPP income in the presence of their spouse.

Q56.   Why is it important to obtain person's SIN information?

SIN is the primary criteria used to match MHSD client's information with CPP payment information.

SIN is also used to determine which Person ID the CPP income should be applied to. Record SIN numbers for as many of the involvements on the file as possible (even children on the file if they have a SIN number). The more SIN numbers we have in MIS, the more thorough the match will be and the fewer unplaced records we will have.

Q57.   Where can I obtain additional information regarding the CPP payment records that are placed manually by PLMS staff in the month they are first received and managed systematically in subsequent months?

Please see the separate CPP Data Match – Unplaced Records Q & A document.

Q58.   Why might SC suddenly stop paying CPP?

SC will stop paying CPP benefits if they receive:

- notice of a recipient's death,
- return mail for the recipient's last known address,
- notice that the electronic funds transfer information is no longer correct
- notice that a child receiving Child of Disabled Contributor or Orphan's Benefits drops out of school
- confirmation that a person is eligible for federal pension benefits from a second country. SC will begin paying CPP out of their International Agreements System which is not currently reflected on the MHSD/SC data match.

You will become aware of the stopped CPP through the Case Review List (the List will report an increase in the client's IA).

Q59.   What is the CPP Tax Exemption?

It is the amount of income tax that is payable by the client to Canada Revenue Agency (CRA) on the client's reported CPP income. This amount is deducted from income by MHSD as the CPP Tax Exemption.

MIS calculates the CPP Tax Exemption amount according the formula specified in Employment and Assistance legislation and exempts the calculated amount from Income Code 11. If the CPP income amount is below the Canada Revenue Agency taxable income threshold, there will be no tax liability and the CPP Tax Exemption amount will be zero. Through implementation of this project we added a $100 maximum exemption. This is to

prevent clients receiving a substantial exemption when receiving large retroactive CPP payments (**Employment and Assistance Regulation, Schedule B, Section 7(e)).**

Q60.   What is an ISP 1613 form?

The ISP1613 Consent to Deduction and Payment is a form issued by SC and provided to MHSD.

Once signed by the client and submitted to SC, the ISP1613 provides SC with authority to pay the ministry the amount of money paid to the client by the ministry while the person was awaiting their CPP. For example, if a person is applying for CPP disability but requires immediate assistance from MHSD while that application is being processed, SC will pay MHSD back for assistance it pays while the CPP application is being processed if an ISP 1613 form is signed and submitted to SC. The form is located on the Ministry Forms Page, near the top of the Forms by Number list.

Q61.   How do I record Quebec Pension Plan (QPP) income?

Enter QPP income on the CPP L or AP3 screens. It will be summed as Income Code 11 on the INC screen. MIS will roll the QPP amount forward month after month so long as no SC CPP record is received (people do not receive both QPP and CPP). QPP is subject to the same tax exemption, and COLA increases as CPP.

CPP Override Information

Q62.   Override Code – Authority Matrix and Description

Note: Do not use the override function for CPP annual COLA Increase.
         The correct amount will be captured by the February upload process each year.

Override Code	Description	Who can set the code	Who can remove the code	Note
1	One time override	EAW/DS /IO/MIS	EAW/DS/ IO/MIS	Authorized worker sets the amount and code when a person reports CPP income on the application and there is no SC data available. If no SC record is received in the subsequent upload, the override code '1' will convert to an override code 'R' (rolling) and be rolled forward month after month by MIS until an SC record is received or the code is removed.
				Authorized worker may also use override code '1' to override the amount of a SC reported CPP payment for month. The override amount applies to this month only and is overwritten with any subsequently received SC record. If no SC record is received in the following month, the CPP amount is not rolled forward.
				To remove a one-time override, the worker will blank out the 'Override Code' field. The 'Override Amount' may also be blanked or zeroed out but the override will not be removed unless the 'Code' is blank. The income code 11 will be recalculated for the file.
				MIS will remove override code '1' if a CPP payment record is received.

R	Override rolled forward by the system	System	EAW/DS/ IO/MIS	This code is set by the system. EAWs, DSs or IOs can remove the override amount and code.

If a client had worker-entered CPP income last month and does not have any this month, the system automatically rolls forward the data and displays an override code 'R'.   A subsequent SC reported CPP payment record will replace an Override Code 'R'.

MIS will remove override code 'R' if a CPP payment record is received. |
| M | Monthly (ongoing) override | DS/IO | DS/IO/

MIS | Only a District Supervisor or Investigative Officer can set code M and enter the amount. The override amount applies to this month and future months. The amount associated with this code will not be overwritten by future SC uploads. CPP L will not allow an EAW to enter this code

After the ongoing override is added, the 'Override Amount' and 'Override Code' fields will be protected if the worker is not a DS or IO.

Only the DS or IO will have access to remove an ongoing override. The process is the same as for a worker removing a one-time override.

MIS will remove override code 'M' if a CPP payment record is not received. |
| P | Person Combine override | System | DS/IO | This code is set by the system when a Person Combine Transaction occurs on a file with CPP income. When a Person Combine occurs, the system sums the CPP income from both files and records it on the combined file with a Override Code "P".

Only a DS or IO can remove Override Code "P". The 'Override Amount' and 'Override Code' fields will be protected if the worker is not a DS or IO. |