

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-248713

Conditional CAPI

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	

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12/20/2023	2.0	<ul style="list-style-type: none"> - Updated Mockups 2.3.1 and 2.3.2 - Updated Section 2.3.3 (items 3 and 4) - Outreach Section 5.1 – removed 'Case Flag Title Description' from Additional Columns. 	T. Lazio, C. O'Donnell
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1 OVERVIEW

Per ACL 08-03, individuals who become naturalized citizens while receiving Cash Assistance Program for Immigrants (CAPI) benefits can continue receiving payments on a conditional basis if they sign a Request for Conditional CAPI form (SOC 830), apply for SSI in a timely manner, and fully cooperate in the application and appeal process of the Social Security Administration (SSA).

The purpose of this SCR is to update existing CAPI EDBC functionality to allow the continuation of CAPI benefit payments for naturalized citizens who signs the conditional CAPI (SOC 830) and are in the process of SSI application approval and/or appeal.

1.1 Current Design

When a CAPI recipient becomes a 'Naturalized US Citizen', CAPI benefit payments are discontinued.

1.2 Requests

Allow CAPI benefits to continue for 'naturalized' citizens who signs conditional CAPI (SOC 830) and are in the process of SSI application approval and/or appeal.

1.3 Overview of Recommendations

1. Add 'Conditional CAPI' field to Case Summary and CAPI Detail pages.
2. Add data collection fields and required field logic to SSIAP (Supplemental Security Income Advocacy Program) Detail Page.
3. Update CAPI EDBC functionality to continue benefits for naturalized citizens with 'pending' SSI applications.
4. Update CAPI EDBC logic to set 'Conditional CAPI' field to 'Yes' on CAPI program case summary page when conditional CAPI criteria is met.
5. Display 'Conditional CAPI' field in the CAPI EDBC Summary Page.
6. Add page mapping for the CAPI EDBC Summary Page.
7. Add 'Conditional CAPI' field to CAPI EDBC (Manual) Detail Page.
8. Add 'Conditional CAPI' field to Program Configuration Override List Detail for CAPI EDBC override.
9. Data change to update Conditional CAPI field default value for existing cases.
10. Generate case listing for CAPI cases with 'Conditional CAPI' case flag.

1.4 Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. The user will be responsible for running EDBC to discontinue conditional CAPI for 'Naturalized Citizen' if SSI application is approved or rejected and/or the SSI appeal is approved or denied.

3. CAPI Interim Assistance Reimbursement (IAR) payments are collected under GR/CAPI recoverable accounts created automatically through batch job PBXXF207 (GRCAPIREcoveryBatch) for counties that are opted in.
4. SOC 830 (Request for Conditional CAPI After Naturalization Pending SSI/SSP Eligibility Determination) form is available in the correspondence template repository.
5. While receiving conditional CAPI all other CAPI eligibility rules will apply. A naturalized citizen receiving conditional CAPI cannot be reinstated into CAPI once CAPI benefits have been terminated.
6. The user will be responsible for setting up recovery accounts for conditional CAPI overpayments due to applicant failure to comply with the SSI application and/or appeal process.
7. Existing CAPI discontinuance NOAs will be used for CAPI participants who are discontinued from conditional CAPI or they don't meet the requirements for conditional CAPI.
8. The user will be responsible for rescinding the CAPI program that is discontinued for 'US Citizen' when a SOC 830 form is signed after the discontinuance but before the 30-day application period has expired.
9. No report changes with this SCR.

2 RECOMMENDATIONS

2.1 Case Summary Page

2.1.1 Overview

The Case Summary page needs to be updated to include an indicator as to whether the CAPI program has qualified for Conditional CAPI.

2.1.2 Case Summary Mockup

▼ CAPI

Worker:	Connor O'Donnell	Primary Applicant/Recipient:	Smith, John 19M
Worker ID:	36AS009100	Language:	English
Program Status:	Pending	Phone Number:	
		Email:	
FBU:	1	Payee:	Smith, John 19M
		Application Date:	12/11/2023
		Conditional CAPI:	No

Name	Role	Role Reason	Status	Status Reason
Smith, John 19M	MEM		Pending	

[View Details](#)

Figure 2.1.1 – Case Summary Mockup

2.1.3 Description of Changes

1. Add a new field to the Case Summary page titled 'Conditional CAPI' directly below the 'Application Date' field. This field will default to 'No' upon case creation. It can be set to 'Yes' via EDBC as described in Section 2.4.2.2. This field is the same value that is being added to the CAPI Detail page described in Section 2.2.3.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping for the new field.

2.1.7 Accessibility

No issues found.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 CAPI Detail Page

2.2.1 Overview

The CAPI Detail page needs to be updated to include an indicator as to whether the CAPI program has qualified for Conditional CAPI.

2.2.2 CAPI Detail Mockup

CAPI Detail

*- Indicates required fields

View History

Issuance Method

Edit

Close

Date: *

01/01/2024

Program Information

Status: *

Pending

Status Reason:

Source: *

In Person

Application Date: *

[12/11/2023](#)

Automatically Reassign When Activated:

No

Conditional CAPI:

No

Figure 2.2.1 – CAPI Detail Mockup

2.2.3 Description of Changes

1. Add a new field to the CAPI Detail page titled 'Conditional CAPI' directly below the 'Automatically Reassign When Activated' field. This field will default to 'No' upon case creation. It can be set to 'Yes' via EDBC as described in Section 2.4.2.2. **This field will appear as a read-only value on the page in both View Mode and Edit Mode.** This field is the same value that is being added to the Case Summary page described in Section 2.1.3.

2.2.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**

- **Task: CAPI Detail**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mapping for the new field.

2.2.7 Accessibility

No issues found.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 SSIAP Detail Page

2.3.1 Overview

The SSIAP Detail page needs to be updated to indicate whether the individual applying for aid has signed the SOC 830 and applied for SSI in a timely manner.

2.3.2 SSIAP Detail Mockup

General Information

Worker Number * [Select](#) SSI Type: *

Is the SOC 830 Signed?:

Referred to Advocate Date: * Disability Type: *

SSI Level:

Refused SSIAP Services: *

Other/Self Representative:

Screened for Advocacy Services Date:

SSI Advocate Participation: IAP Advocate:

SSI Application Initiated:

Disposed:

Participant has their Own Lawyer: Cooperated within the Time Limit:

Follow-Up: Follow-Up Date:

Doctor's Recommendation:

Verified: * [View](#)

Application / Reconsideration

Application

Application Signed Date:

Title II Decision:

Application Reapplied: SSI Application Result:

Figure 2.3.1 – SSIAP Detail Mockup ('Is the SOC 830 Signed' not set to 'Yes')

General Information

Worker Number * SSI Type: *

Is the SOC 830 Signed?:

SOC 830 Signed Date: * Naturalization Report Date: *

SSI Level:

Other/Self Representative:

Screened for Advocacy Services Date:

SSI Advocate Participation: IAP Advocate:

SSI Application Initiated:

Disposed:

Participant has their Own Lawyer: Cooperated within the Time Limit:

Follow-Up: Follow-Up Date:

Doctor's Recommendation:

Verified: *

Application / Reconsideration

Application

Application Signed Date:

Title II Decision:

Application Reapplied: SSI Application Result:

Figure 2.3.2 – SSIAP Detail Mockup ('Is the SOC 830 Signed' set to 'Yes')

2.3.3 Description of Changes

1. Add a new select field titled 'Is the SOC 830 Signed' directly above the 'Referred to Advocate Date' field. The field will have the following options:
 - a. Blank space
 - b. 'No'
 - c. 'Yes'

2. Add a new date field titled 'SOC 830 Signed Date' directly below the 'Is the SOC 830 Signed' field. This field will dynamically appear and be required only when 'Is the SOC 830 Signed' is set to 'Yes'.
3. Add a new date field titled 'Naturalization Report Date' next to the 'SOC 830 Signed Date' field. This field will dynamically appear and be required only when 'Is the SOC 830 Signed' is set to 'Yes'.
4. Update the logic of the following fields to be hidden and not required when 'Is the SOC 830 Signed' is set to 'Yes'. The fields will otherwise remain visible and required:
 - a. Referred to Advocate Date
 - b. Disability Type
 - c. Refused SSIAP Services
5. Add the following validation:
 - a. SSI Application Result Validation
 - i. Condition: When 'Is the SOC 830 Signed' is set to 'Yes', the 'SSI Application Result' field must have a value selected.
 - ii. Message: "SSI Application Result – When 'Is the SOC 830 Signed' has a value of 'Yes', 'SSI Application Result' must have a value selected".
 - b. SOC 830 Signed Date Validation
 - i. Condition: The 'SOC 830 Signed Date' date entry must be on or after the 'Naturalization Report Date' date entry.
 - ii. Message: "SOC 830 Signed Date – The 'SOC 830 Signed Date' date entry must be on or after the 'Naturalization Report Date' date entry".

2.3.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: SSIAP**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update page mapping for new fields.

2.3.7 Accessibility

No issues found.

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 Update CAPI EDBC Functionality

2.4.1 Overview

When a CAPI recipient becomes a naturalized citizen, EDBC automatically discontinues benefits. However, per policy a naturalized citizen can request continuation of CAPI benefits by signing a request form for conditional CAPI (SOC 830) while their SSI application is still pending or while their appeal of an SSI eligibility rejection determination is still pending.

This SCR will update existing CAPI EDBC functionality to allow CAPI benefits to continue for naturalized citizens who have a signed SOC 830 and have a pending SSI application and/or appeal.

2.4.2 Description of Changes

1. Update existing CAPI EDBC logic to set 'Conditional CAPI' field to 'Yes' on CAPI program Case Summary and CAPI Detail pages when all the following are true:
 - a. Participant received CAPI benefits in the prior month.
 - b. There exists a SSIAP record for the participant that is effective any date within the benefit month.
 - c. Participant's Citizenship type is 'Naturalized US Citizen'. See Appendix.
 - d. 'Is the SOC 830 signed?' = 'Yes' on SSIAP detail page.
 - e. The 'SOC 830 Signed Date' must be within 30 days of the 'Naturalization Report Date' on the SSIAP detail page.

- AND -

One of the following is true:

- f. SSI Application Result is 'Pending' on SSIAP detail page.
- OR -
- g. SSI Appeals Council Decision on SSIAP detail page equals one of the following:
 - i. Pending
 - ii. Pending Other
 - iii. Pending Self

Note: The 'Conditional CAPI' field default value will be 'No'.

2. Update CAPI EDBC logic to grant CAPI benefits to recipients who meet the criteria from recommendation 1 above.

- 3. The 'Conditional CAPI' field should be displayed in CAPI EDBC Summary Page as shown below:

CAPI EDBC Summary

* - Indicates required fields Close

Begin Month	End Month	Run Date	Run Status	Accepted By
01/2024		01/12/2024	Accepted - Saved	Montie Jeffirs

EDBC Information

Non-Reporting Household Exemption: Change Reporting

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Conditional CAPI: Yes

Aid Code: 6T - CAPI-Limited Term

Program Status: Active

Figure 2.4.3.1 – CAPI EDBC Summary Page After SCR is Implemented

- 4. Add page mapping for the CAPI EDBC Summary Page.

2.4.3 Programs Impacted

CAPI

2.5 Update CAPI EDBC (Manual) Detail Page

2.5.1 Overview

The 'Conditional CAPI' option should be available for the user to choose on the CAPI EDBC (Manual) Detail page when performing a Manual CAPI EDBC.

2.5.2 CAPI EDBC (Manual) Detail Page Example

CAPI EDBC (Manual)

*- Indicates required fields Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
01/2024		12/06/2023	Not Accepted	Thomas Lazio

EDBC Information

Type: Regular
Recalculation: No

Program Configuration

Override Reason: New Policy

Conditional CAPI
 m Determination

EDBC Source: Manual

Aid Code:

Program Status: Active

Figure 2.5.2.1 – CAPI EDBC (Manual) Detail Page After SCR is Implemented

2.5.3 Description of Changes

1. Update the CAPI EDBC (Manual) Detail page with 'Conditional CAPI' dropdown field with the following options:
 - i. No
 - ii. Yes

Note: Default value will be set to 'No' in the 'Program Configuration' section where the user can update the dropdown field value. The 'Conditional CAPI' dropdown field will be displayed in the CAPI EDBC (Manual) page as shown in **Figure 2.5.2.1** above.

2.5.4 Programs Impacted

CAPI

2.5.5 Page Mapping

Update page mapping for new fields.

2.6 Update Override CAPI EDBC Page

2.6.1 Overview

The 'Conditional CAPI' option should be available for the user to choose on the Program Configuration Override List Detail page when overriding a CAPI EDBC.

2.6.2 Program Configuration Override List Detail Page Example (CAPI EDBC)

The screenshot displays the 'Program Configuration Override List' form. At the top, there is a header with the title and two buttons: 'Save and Return' and 'Cancel'. Below the header, a red asterisk indicates required fields. The 'EDBC Override Reason' field is set to 'Administrative Decision'. The 'System Determination' section includes fields for 'EDBC Source Code' (Online EDBC Rules), 'Conditional CAPI' (No), 'Aid Code' (6T - CAPI-Limited Term), 'Program Status' (Active), and 'Program Status Reason'. The 'User Override' section includes a 'Conditional CAPI' dropdown menu with 'No' selected, an 'Aid Code' dropdown menu, and a 'Clear' button. There are also two empty 'Program Status' dropdown menus and a 'Program Status Reason' dropdown menu.

Figure 2.6.2.1 – Program Configuration Override List Detail Page (CAPI EDBC) After SCR is Implemented

2.6.3 Description of Changes

1. Update the Program Configuration Override List Detail page (CAPI EDBC) with 'Conditional CAPI' dropdown field with the following options:
 - i. No
 - ii. Yes

Note: Default value will be set to 'No' in the 'User Override' section where the user can update the dropdown field value. The 'Conditional CAPI' dropdown field will be displayed in the Program Configuration Override List Detail page as shown in **Figure 2.6.2.1** above.

2.6.4 Programs Impacted

CAPI

2.6.5 Page Mapping

Update page mapping for new fields.

2.7 Data Change – Add Conditional CAPI

2.7.1 Overview

With the addition of the Conditional CAPI field, existing CAPI cases need to be updated to have the default value of 'No'.

2.7.2 Description of Change

1. Update all existing CAPI cases to have their Conditional CAPI value (added in Section 2.2) set to 'No'.

2.7.3 Estimated Number of Records Impacted/Performance

79,619

2.8 Automated Regression Test

2.8.1 Overview

Create new automated regression test scripts to verify the 'Conditional CAPI' options when running EDBC for the CAPI program, options on the SSIAP Detail page, and display on the Case Summary and CAPI Detail pages.

2.8.2 Description of Change

Create new regression scripts to provide the following coverage:

1. Verify the 'Conditional CAPI' field displays on the Case Summary page, with the following values:
 - a. 'No' for a new CAPI program in 'Pending' status
 - b. 'No' for a CAPI program in 'Active' status that was not determined to be conditionally eligible as outlined in Section 2.4.2
 - c. 'Yes' for a CAPI program in 'Active' status that was determined to be conditionally eligible as outlined in Section 2.4.2

- d. 'Yes' for a CAPI program in 'Discontinued' status that was previously determined to be conditionally eligible as outlined in Section 2.4.2
- 2. Verify the 'Conditional CAPI' field displays on the CAPI Detail page, with the same value as the same field displayed on the Case Summary page in each scenario outlined in the previous recommendation.
- 3. Verify the following on the SSIAP Detail page:
 - a. The 'Is the SOC 830 Signed' field displays in create and edit modes, with the following values available for selection:
 - i. -Select-
 - ii. No
 - iii. Yes
 - b. The 'SOC 830 Signed Date' field displays in create and edit modes only when 'Yes' is selected from the 'Is the SOC 830 Signed' field.
 - c. The 'Referred to Advocate Date' field is not required when 'Yes' is selected from the 'Is the SOC 830 Signed' field.
 - d. The 'SSI Application Result' field is required when 'Yes' is selected from the 'Is the SOC 830 Signed' field.
- 4. Verify the 'Conditional CAPI' field is available on the CAPI EDBC (Manual) Detail page in create mode, with 'No' and 'Yes' values available for selection. Verify that EDBC results can be accepted and saved with each value selected.
- 5. Verify the 'Conditional CAPI' field is available on the Program Configuration List page when overriding a CAPI EDBC result, with 'No' and 'Yes' values available for selection. Verify that EDBC results can be accepted and saved with each value selected.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.14	The LRS shall determine which individuals must be included in the eligibility determination and take appropriate action(s), based on program rules.	This SCR will update CAPI EDBC rules to allow naturalized citizens who apply for conditional CAPI to continue benefits while SSI application is still pending.

4 APPENDIX

As of 11/14/2023, the list below shows the Document Types for the Citizenship Status Detail page that result in the CAPI participant being a 'Naturalized US Citizen':

- Certificate of Citizenship-N-550, N-570, N-571 or N-578
- I-179 or I-197 - US Citizen Identification Card
- US Passport

5 OUTREACH

5.1 Lists

List Name: CAPI Cases With 'Conditional CAPI' Case Flags

List Criteria: All CAPI cases that meet the following criteria:

- CAPI program exists on the case.
- There exists a case flag record with one of the following title descriptions:
 - Conditional CAPI
 - Conditional CAPI Flag
 - Conditional CAPI-Naturalized
 - _zzzCAPI-Conditional CAPI

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- Program Status (**Note:** As of current system date)
- Program Status Reason (**Note:** Can be null)
- Case Flag Begin Date
- Case Flag End Date (**Note:** Can be null)

Frequency: One-Time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-248713

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-262222

Batch job for Kin-GAP and Foster Care when
Youth turns 18

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/14/2024	1.0	Initial version	Edgars Reinholds
4/12/2024	1.1	Updates from Region 6 comments. Move out requirements 2.1 and 2.2 that would create new KG Prorate and Disc EDBC Sweeps when child turns 18 into a separate SCR. Content Revision 1.	Edgars Reinholds

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1 OVERVIEW

This SCR will introduce new EDBC sweeps to prorate and discontinue participants from Foster Care, Kin-GAP, or Adoptions Assistance Program when they reach 18 or 21 years of age.

1.1 Current Design

The following batch EDBC sweep jobs exist trigger Foster Care (FC), Kin-GAP (KG) and Adoptions Assistance Program (AAP) when the participants reach 18 and 21 years of age.

SCR CA-201036 implemented the following batch EDBC jobs:

- PB00E906 – FC Child Turns 21 Prorate Benefit
 - Program type is Foster Care (FC). This condition will include the ARC program since FC or ARC program are in the same program type in CalSAWS – (FC).
 - Program status is active as of the Batch Date.
 - Child status is active as of the Batch Date.
 - There is an active child placement as of the Batch Date.
 - One calendar day before the child's 21st birthday is between the Last Success Batch Run Date and Batch Date.
 - There is no EDBC run (EDBC that has Accepted and Saved status) on the current month run.
 - Trigger Batch EDBC effective the current month that the child turns 21 years old. Even though the batch run date is after the Batch 10 days cutoff, the batch will trigger EDBC effective on the current month to prorate.
 - Trigger Batch EDBC in 'All Program' mode.
 - Trigger regular Batch EDBC rules.
 - Journal Entry batch name: 'Prorate NMD turned 21'.
 - Runs Daily.
 - Counties Opted In:
01,03,04,06,07,08,09,10,11,12,13,14,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,55,56,57,58

- PB00E907 – FC Child Turns 21 Discontinue Benefit
 - Program type is Foster Care (FC). This condition will include the ARC program since FC or ARC program are in the same program type in CalSAWS – (FC).
 - Program status is active as of the following month (the month after the child turns 21).
 - Child status is active as of the following month.
 - There is an active child placement as of the Batch Date.

- One calendar day before the child's 21st birthday is between the Last Success Batch Run Date and Batch Date, or child's age is over 21.
 - Trigger Batch EDBC effective the following month.
 - Trigger Batch EDBC in 'All Program' mode.
 - Trigger regular Batch EDBC rules.
 - Journal Entry batch name: 'Disc NMD turned 21'.
 - Runs Daily.
 - Counties Opted In:
01,03,04,06,07,08,09,10,11,12,13,14,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,55,56,57,58
- PB00E908 – KG Child Turns 21 Prorate Benefit
 - Program type is Kin-GAP (KG).
 - Program status is active effective the month following the batch date.
 - Child status is active effective the month following the batch date.
 - Child's 21st birthday is the month following the Batch Date.
 - Trigger Batch EDBC effective for the month in which the child turns 21.
 - Trigger Batch EDBC in 'All Program' mode.
 - Trigger regular Batch EDBC rules.
 - Journal Entry batch name: 'Prorate NMD turned 21'.
 - Runs Monthly 3rd Business Day.
 - Counties Opted In:
02,03,04,05,06,08,09,11,12,13,14,15,18,19,20,21,22,24,25,26,27,28,29,33,35,36,39,45,47,50,51,52,53,55,58
- PB00E909 – KG Child Turns 21 Discontinue Benefit
 - Program type is Kin-GAP (KG).
 - Program status is active in the following month.
 - Child status is active in the following month.
 - Child's 21st birthday is in the current month or child's age is over 21.
 - Trigger Batch EDBC effective the following month.
 - Trigger Batch EDBC in 'All Program' mode.
 - Trigger regular Batch EDBC rules.
 - Journal Entry batch name: 'Disc NMD turned 21'.
 - Runs Monthly before 10-day cutoff.
 - Counties Opted In:
02,03,04,05,06,08,09,11,12,13,14,15,18,19,20,21,22,24,25,26,27,28,29,33,35,36,39,45,47,50,51,52,53,55,58

LA County Only has the following batch EDBC Sweep jobs:

- PB19E201 – Non-Minor Dependent (NMD) Turns 18 Remove from AAP
 - Program Type is AAP and active as of the following month.

- Child turns 18 in the current month.
 - "Was the Initial AAP Agreement signed on or after the youth's 16th birthday?" – Answered No
 - "Does the AAP youth have a mental or physical disability that meets the requirements for extended benefits?" – Answered No or not answered.
 - "Is the AAP youth meeting participation requirements for extended benefits?" – Answered No or not answered.
 - Trigger DCFS EDBC effective the following month.
 - Trigger DCFS EDBC in 'Single Program' mode.
 - Trigger regular DCFS EDBC rules.
 - Runs Monthly on 10th calendar day.
 - Journal Entry batch name: NMD turned 18.
- PB19E202 – Non-Minor Dependent (NMD) Turns 21 Remove from AAP
 - Program Type is AAP and active as of the following month.
 - Child turns 21 in the current month.
 - Trigger DCFS EDBC effective the following month.
 - Trigger DCFS EDBC in 'Single Program' mode.
 - Trigger regular DCFS EDBC rules.
 - Runs Monthly on 10th calendar day.
 - Journal Entry batch name: NMD turned 21.

1.2 Requests

Create batch EDBC sweeps for FC and KG when child turns 18.

Opt-in Counties to existing FC/KG Child Turns 21 and AAP EDBC Sweep jobs.

1.3 Overview of Recommendations

1. ~~Create KG Child Turns 18 Prorate Benefit EDBC Sweep.~~
2. ~~Create KG Child Turns 18 Discontinue Benefit EDBC Sweep.~~
3. Create FC Child Turns 18 Prorate Benefit EDBC Sweep.
4. Create FC Child Turns 18 Discontinue Benefit EDBC Sweep.
5. Update AAP sweep jobs PB19E201 and PB19E202 to be all county jobs and Opt-in other counties. Rename the job to be an All-County Batch EDBC sweep job (00).
6. Opt-in Counties into FC/KG Child Turns 21 prorate and discontinue EDBC Sweeps.

1.4 Assumptions

1. Standard batch EDBC skips apply and will be available on the Batch Eligibility Report.
2. DCFS EDBC is separate batch EDBC run that runs only for LA County for DCFS programs after the regular Batch EDBC. The two AAP DCFS sweep jobs mentioned will become Batch EDBC sweep jobs. Remainder of DCFS batch jobs will be unchanged.

2 RECOMMENDATIONS

2.1 KG Child Turns 18 Prorate EDBC Sweep

2.1.1 Overview

Create a batch EDBC sweep that picks up cases when KG child turns 18 to prorate benefits.

2.1.2 Description of Change

1. Create a batch EDBC sweep that picks up cases when KG child turns 18 to prorate benefits.

Batch EDBC Sweep	Description
New/Update	New
Sub Type Code	Prorate NMD turned 18
Trigger Conditions	<ol style="list-style-type: none"> 1. Program type is Kin GAP (KG). 2. Program status is active effective the month following the batch date. 3. Child status is active effective the month following the batch date. 4. Child's 18th birthday is the month following the Batch Date. 5. Trigger Batch EDBC effective for the month in which the child turns 18. 6. Trigger Batch EDBC in 'All Program' mode. 7. Trigger regular Batch EDBC rules. 8. The batch will run with the new sub type code 'Prorate NMD turned 18'.
Batch EDBC Mode	All Programs
Run RSN Code	N/A.
Negative Action Code	N/A.
Benefit Months	1. Trigger Batch EDBC effective for the month in which the child turns 18.
Note: Existing Cases	Monthly 3 rd Business Day.

2. Standard Batch EDBC Journal Entry.

Journal Entry	Description
New/Update	New
Journal Category	All
Journal Type	Batch EDBC
Short Description	Batch EDBC ran for <Month Year>.
Long Description	Batch EDBC ran for <Month Year>. Batch EDBC processed for the CF/NB program for following reasons: Prorate NMD turned 18
Trigger Condition	When a KG child turns 18 years of age.

3. Create a BPCR and BSCR to schedule the job to run Monthly 3rd Business Day.

2.1.3 Execution Frequency

Monthly 3rd Business Day.

2.1.4 Key Scheduling Dependencies

Successor – Batch EDBC.

2.1.5 Counties Impacted

See supporting documents for the list of counties that opt in.

2.1.6 Category

Core.

2.1.7 Data Volume/Performance

Estimated average is 150 records per month across all counties.

2.1.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.2 KG Child Turns 18 Discontinue EDBC Sweep

2.2.1 Overview

Create a batch EDBC sweep that picks up cases when KG child turns 18 to discontinue program.

2.2.2 Description of Change

1. Create a batch EDBC sweep that picks up cases when KG child turns 18 to discontinue program.

Batch EDBC Sweep	Description
New/Update	New
Sub Type Code	Disc NMD turned 18
Trigger Conditions	<ol style="list-style-type: none"> 1. Program type is Kin GAP (KG). 2. Program status is active in the following month. 3. Child status is active in the following month. 4. Child's 18th birthday is in the current month. 5. Trigger Batch EDBC effective the following month. 6. Trigger Batch EDBC effective the following month. 7. The batch will run with the new sub type code 'Disc NMD turned 18'.
Batch EDBC Mode	All Programs
Run RSN Code	N/A.
Negative Action Code	N/A.
Benefit Months	1. Trigger Batch EDBC effective the following month.
Note: Existing Cases	Monthly before batch 10-day.

2. Standard Batch EDBC Journal Entry.

Journal Entry	Description
---------------	-------------

New/Update	New
Journal Category	All
Journal Type	Batch EDBC
Short Description	Batch EDBC ran for <Month Year>.
Long Description	Batch EDBC ran for <Month Year>. Batch EDBC processed for the CF/NB program for following reasons: Disc NMD turned 18
Trigger Condition	When a KG child turns 18 years of age.

3. Create a BPCR and BSCR to schedule the job to run Monthly before batch 10-day.

2.2.3 Execution Frequency

Monthly before batch 10-day.

2.2.4 Key Scheduling Dependencies

Successor – Batch EDBC.

2.2.5 Counties Impacted

See supporting documents for the list of counties that opt in.

2.2.6 Category

Core.

2.2.7 Data Volume/Performance

Estimated average is 150 records per month across all counties.

2.2.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.3 FC Child Turns 18 Prorate EDBC Sweep

2.3.1 Overview

Create a batch EDBC sweep that picks up cases when FC child turns 18 to prorate benefits.

2.3.2 Description of Change

1. Create a batch EDBC sweep that picks up cases when FC child turns 18 to prorate benefits.

Batch EDBC Sweep	Description
New/Update	New
Sub Type Code	Prorate Youth turned 18
Trigger Conditions	<ol style="list-style-type: none"> 1. Program type is Foster Care (FC). This condition will include the ARC program since FC or ARC program are in the same program type in CalSAWS – (FC). 2. Program status is active as of the Batch Date. 3. Child status is active as of the Batch Date. 4. There is an active child placement as of the Batch Date. 5. One calendar day before the child's 18th birthday is between the Last Success Batch Run Date and Batch Date. 6. There is no EDBC run (EDBC that has Accepted and Saved status) on the current month run. 7. Trigger Batch EDBC effective the current month that the child turns 18 years old. Even though the batch run date is after the Batch 10 days cutoff, the batch will trigger EDBC effective on the current month to prorate. 8. Trigger Batch EDBC in 'All Program' mode. 9. Trigger regular Batch EDBC rules.
Batch EDBC Mode	All Programs
Run RSN Code	N/A.
Negative Action Code	N/A.
Benefit Months	1. Trigger Batch EDBC effective the current month that the child turns 18 years old.
Note: Existing Cases	Daily – Mon-Sat.

2. Standard Batch EDBC Journal Entry.

Journal Entry	Description
New/Update	New
Journal Category	Eligibility
Journal Type	Batch EDBC
Short Description	Batch EDBC ran for <Month Year>.
Long Description	Batch EDBC ran for <Month Year>. Batch EDBC processed for the Foster Care program for following reasons: Prorate Youth turned 18
Trigger Condition	When a FC child turns 18 years of age.

3. Create a BPCR and BSCR to schedule the job to run Daily.

2.3.3 Execution Frequency

Daily – Mon-Sat.

2.3.4 Key Scheduling Dependencies

Successor – Batch EDBC.

2.3.5 Counties Impacted

See supporting documents for the list of counties that opt-in.

2.3.6 Category

Core.

2.3.7 Data Volume/Performance

Estimated average is 250 records per month across all counties.

2.3.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.4 FC Child Turns 18 Discontinue EDBC Sweep

2.4.1 Overview

Create a batch EDBC sweep that picks up cases when FC child turns 18 to discontinue program.

2.4.2 Description of Change

1. Create a batch EDBC sweep that picks up cases when FC child turns 18 to discontinue program.

Batch EDBC Sweep	Description
New/Update	New
Sub Type Code	Disc Youth turned 18
Trigger Conditions	<ol style="list-style-type: none"> 1. Program type is Foster Care (FC). This condition will include the ARC program since FC or ARC program are in the same program type in CalSAWS – (FC). 2. Program status is active as of the following month (the month after the child turns 18). 3. Child status is active as of the following month. 4. There is an active child placement as of the Batch Date. 5. One calendar day before the child's 18th birthday is between the Last Success Batch Run Date and Batch Date. 6. Trigger Batch EDBC effective the following month. 7. Trigger Batch EDBC in 'All Program' mode. 8. Trigger regular Batch EDBC rules.
Batch EDBC Mode	All Programs
Run RSN Code	N/A.
Negative Action Code	N/A.
Benefit Months	1. Trigger Batch EDBC effective the following month.
Note: Existing Cases	Daily – Mon-Sat.

2. Standard Batch EDBC Journal Entry.

Journal Entry	Description
New/Update	New
Journal Category	Eligibility
Journal Type	Batch EDBC
Short Description	Batch EDBC ran for <Month Year>.
Long Description	Batch EDBC ran for <Month Year>. Batch EDBC processed for the Foster Care program for following reasons: Disc Youth turned 18
Trigger Condition	When a FC child turns 18 years of age.

3. Create a BPCR and BSCR to schedule the job to run daily.

2.4.3 Execution Frequency

Daily – Mon-Sat.

2.4.4 Key Scheduling Dependencies

Successor – Batch EDBC.

2.4.5 Counties Impacted

See supporting documents for the list of counties that opt-in.

2.4.6 Category

Core.

2.4.7 Data Volume/Performance

Estimated average is 250 records per month across all counties.

2.4.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.5 Update AAP Child Turns 18 Discontinuance EDBC Sweep (PB19E201)

2.5.1 Overview

Modify PB19E201 sweep job to be 00 job for all counties. Update to records to be processed by Batch EDBC (e.g. PB00E501) instead of DCFS EDBC (e.g. PB19K501).

2.5.2 Description of Change

1. Create a BPCR to rename the job for All-County processing.
2. Modify PB19E201 sweep job to trigger Batch EDBC (e.g. PB00E501) instead of DCFS EDBC (e.g. PB19K501).
3. Create a BSCR to set Batch EDBC as successor instead of DCFS EDBC.

2.5.3 Execution Frequency

No change. Monthly on 10th calendar day

2.5.4 Key Scheduling Dependencies

Successor – Batch EDBC.

2.5.5 Counties Impacted

See supporting documents for the list of counties that opt-in.

2.5.6 Category

Core.

2.5.7 Data Volume/Performance

Estimated average is 560 records per month across all counties.

2.5.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.6 Update AAP Child Turns 21 Discontinuance EDBC Sweep (PB19E202)

2.6.1 Overview

Modify PB19E202 sweep job to be 00 job for all counties. Update to records to be processed by Batch EDBC (e.g. PB00E501) instead of DCFS EDBC (e.g. PB19K501).

2.6.2 Description of Change

1. Create a BPCR to rename the job for All-County processing.
2. Modify PB19E202 sweep job to trigger Batch EDBC (e.g. PB00E501) instead of DCFS EDBC (e.g. PB19K501).
3. Create a BSCR to set Batch EDBC as successor instead of DCFS EDBC.

2.6.3 Execution Frequency

No change. Monthly on 10th calendar day

2.6.4 Key Scheduling Dependencies

Successor – Batch EDBC.

2.6.5 Counties Impacted

See supporting documents for the list of counties that opt-in.

2.6.6 Category

Core.

2.6.7 Data Volume/Performance

Estimated average is 150 records per month across all counties.

2.6.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.7 Opt-In Counties into FC/KG Child Turning 21 EDBC Sweeps

2.7.1 Overview

Opt-in counties into PB00E908 – KG Child Turns 21 Prorate Benefit and PB00E909 – KG Child Turns 21 Discontinue Benefit batch EDBC sweep jobs.

Opt-in counties into PB00E906 – FC Child Turns 21 Prorate Benefit and PB00E907 – FC Child Turns 21 Discontinue Benefit batch EDBC sweep jobs.

2.7.2 Description of Change

1. Opt-in counties into PB00E908 – KG Child Turns 21 Prorate Benefit and PB00E909 – KG Child Turns 21 Discontinue Benefit batch EDBC sweep jobs.
2. Opt-in counties into PB00E906 – FC Child Turns 21 Prorate Benefit and PB00E907 – FC Child Turns 21 Discontinue Benefit batch EDBC sweep jobs.
3. Create a BPCR to add counties.

2.7.3 Execution Frequency

No Change.

2.7.4 Key Scheduling Dependencies

No Change.

2.7.5 Counties Impacted

See supporting documents for the list of counties that opt-in.

2.7.6 Category

Core.

2.7.7 Data Volume/Performance

Estimated average is 20 records per month across all counties.

2.7.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file

from the directory and contacting the external partner if there is an account or password issue, etc...)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.1	The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention.	EDBC will be triggered for KG, FC, and AAP programs when child turns 18 and 21 years of age.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-265202

ACL 23-93 Exempt Child Support

Income Types for Formerly

Assisted CW Families

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Paul Galloway, William Baretsky
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2024.01.16	.01	Initial Draft	Paul Galloway
2024.01.22	.02	Added automation Regression Test updates	William Baretsky
2024.01.26	.03	Added requirement for list of affected cases	Paul Galloway
2024.01.30	.04	Updated with comments from B.A. review	Paul Galloway
2024.02.26	.05	Added assumption requested in committee comments	Paul Galloway
2024.04.01	.06	Design Clarification: income should be exempt for all in the household, so changing "AU" to "household" in section 2.1 and 2.2 to clarify.	Paul Galloway
2024.05.09	.07	CONTENT REVISION #2: Remove the requirement in this SCR to generate a list of affected cases for workers to review (Recommendation #2, Section 2.2, and all related references). The list is being replaced by processing the affected cases in a Batch EDBC run in new SCR CA-277703.	Paul Galloway

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1 OVERVIEW

ACL 23-93 directs SAWS to exempt all support payments from consideration in CalWORKs (CW) eligibility for K1/3F families.

1.1 Current Design

The Income Detail page identifies several types of support income. EDBC treats them as “Unearned” or “Exempt” based on the income type regardless of the aid code of the Assistance Unit (AU).

1.2 Requests

1. Per ACL 23-93 any support income (child, spousal, family) received by a K1/3F family must be exempt from consideration as income and resources for purposes of determining CW eligibility and grant amount.

1.3 Overview of Recommendations

1. Update CW EDBC beginning in the July 2024 benefit month to exempt any support income (child, spousal, family) when the CW AU has one of the following aid codes:

- **3F** - CW-Safety Net/Felon/WTW Sanct-Two Parent
- **K1** - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent

~~2. Provide the counties a list of cases that will potentially have a benefit calculation change when CW EDBC is run after this change is implemented.~~

1.4 Assumptions

The changes made by this SCR are only for CW. They will not affect how unearned income is treated in any other program.

2 RECOMMENDATIONS

2.1 Eligibility: Update Income Exemption Logic

2.1.1 Overview

Income is classified for each program based on Income Type in the "Income Type Code" table. Update CW EDBC logic to exempt any income that is considered "support" and is received by **any member of a CW household** when EDBC results in a K1 or 3F aid code regardless of the code table classification of the income.

2.1.2 Description of Changes

1. Update EDBC to exempt any support income received by **any member of a CW household** from consideration in eligibility and grant amount determination when EDBC results in a K1 or 3F Aid Code if the benefit month is July 2024 or later.

Currently, support income classification for CW **households** is determined based on the Income Type in Code Table 186 as shown in this excerpt:

Code	Short Decode Name	CW Classification
12	Child Support - Direct	Unearned
13	Child Support - Excess	Unearned
14	Child Support - Disregard	Unearned
15	Spousal Support - Direct	Unearned
33	Spousal Support - Disregard	Exempt
B4	Child Support - Through LCSA	Unearned
B5	Child & Spousal Support - Through LCSA	Unearned
B6	Spousal Support - Through LCSA	Unearned
EW	Child/Spousal Support DA-Current Retained	Unearned
EX	Child/Spousal Support DA-Prior Disregard	Exempt

This change should not update the code table classification, but if the Aid Code for the CW AU is K1 or 3F then all the support income types shown in the above table need to be treated as exempt by CW EDBC.

2.1.3 Programs Impacted

CW

2.1.4 Performance Impacts

None

2.2—Eligibility: List of Potentially Impacted Cases

2.2.1—List Details

When this change is implemented in CalSAWS, a one-time list will be generated to identify potentially impacted cases for the counties to review.

List Name: List of Cases Potentially Impacted by CA-265202

List Criteria: Cases meeting all the following criteria:

- Active CW Program.
- High-dated Aid Code is K1 or 3F.
- An active person in the household has one of the eight types of Support Income from Code Table 186 that are currently treated as Unearned (see section 2.1.2, above) in the income category “Cash / CalFresh”.
- The high-dated EDBC for the CW program has a Net Nonexempt Income amount greater than zero. The EDBC must be Accepted and Saved, Type of Regular, and not created by Conversion.

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- Aid Code
- Net Unearned Income Amount
- Income Type

Frequency: One-time

Location:

The list will be posted to:

CalSAWS Web Portal
 >System Changes
 >SCR and SIR Lists
 >2024
 >CA-265202

2.3 Automated Regression Test

2.3.1 Overview

Create new automated regression test scripts to verify income exemption during CalWORKs EDBC for each of the following aid code and income type combinations: K1 Child Support; K1 with Spousal Support; 3F with Child Support; 3F with Spousal Support.

Note: Only one income type from each larger category will be covered, and only those income types that were not previously Exempt. For example, the “Child Support” scenarios will use one of the following codes: 12, 13, 14, B4, B5, EW.

2.3.2 Description of Change

1. Create new regression scripts to verify that Child Support income of one of the following types is not counted when CalWORKs EDBC grants benefits under aid code K1:
 - a. Child Support - Direct
 - b. Child Support - Excess
 - c. Child Support - Disregard
 - d. Child Support - Through LCSA
 - e. Child & Spousal Support - Through LCSA

Technical Note: As noted above, only one of these income types will be used. A separate script will not be created for each listed income type.

2. Create new regression scripts to verify that Child Support income of one of the following types is not counted when CalWORKs EDBC grants benefits under aid code 3F:
 - a. Child Support - Direct
 - b. Child Support - Excess
 - c. Child Support – Disregard
 - d. Child Support - Through LCSA
 - e. Child & Spousal Support - Through LCSA

Technical Note: As noted above, only one of these income types will be used. A separate script will not be created for each listed income type.

3. Create new regression scripts to verify that Spousal Support income of one of the following types is not counted when CalWORKs EDBC grants benefits under aid code K1:
 - a. Spousal Support - Direct
 - b. Spousal Support - Through LCSA
 - c. Child & Spousal Support - Through LCSA

Technical Note: As noted above, only one of these income types will be used. A separate script will not be created for each listed income type.

4. Create new regression scripts to verify that Spousal Support income of one of the following types is not counted when CalWORKs EDBC grants benefits under aid code 3F:
 - a. Spousal Support - Direct
 - b. Spousal Support - Through LCSA
 - c. Child & Spousal Support - Through LCSA

Technical Note: As noted above, only one of these income types will be used. A separate script will not be created for each listed income type.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-549	The LRS shall determine what income is to be included or excluded and how to treat the income, based on program-specific rules. - Application Registration and Application Evaluation - 2.4.3.11	Income exemption is being updated to comply with policy updates.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-265535

CFET Program Status Cleanup for Orange
County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell
	Reviewed By	Matt Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/01/2023	1.0	Initial Draft	Connor O'Donnell
01/31/2023	1.1	Content Revision: -Updated Sections 1.3, 2.1.1, 2.1.2	Connor O'Donnell

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1 OVERVIEW

1.1 Current Design

The CFET program converted with an exempt CFET status in CalSAWS because these records existed in CalWIN. It is not a conversion issue since it pulled in the correct status. However, Orange County was not offering CFET services to customers prior to September 2023, so any CFET program block prior to 9/1/2023 should be deregistered with an end date of 8/31/2023, regardless if CalFresh is active or closed for all program blocks.

Orange County is requesting to leave all CFET program blocks if the begin date is 9/1/2023 or after.

Total Impact: Active: 20,945, Exempt: 28,635 = Total: 49,580

1.2 Requests

For Orange County, end-date CFET records and Deregister all CFET program blocks with End date of 08/31/2023 if the Begin date is prior to 9/1/2023

1.3 Overview of Recommendations

1. Deregister all CFET programs for Orange County ~~that have a~~ where the most recent open status has a Begin Date prior to 09/01/2023. The deregistered programs should be given an End Date of 08/31/2023 and a deregistered status that begins 09/01/2023.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Data Change – Deregister CFET Programs for Orange County

2.1.1 Overview

Orange County did not offer CFET prior to 09/01/2023. CalWIN records for Orange County were pulled into the system that had CFET records prior to this date, this change will deregisters all Orange County CFET programs that have a **most recent open status with a** Begin Date prior to 09/01/2023.

2.1.2 Description of Change

1. ~~Deregister all CFET programs for Orange County that have a Begin Date prior to 09/01/2023. The deregistered programs should be given an End Date of 08/31/2023. Deregister all CFET programs for Orange County where the program does not have an open status (i.e. Active or Exempt) with a Begin Date on or after 09/01/2023. Do so by end-dating the status that is currently effective 08/31/2023 with an end date of 08/31/2023, removing all currently existing statuses after that status, and adding a deregistered status with a Begin Date of 09/01/2023. For programs that were closed on that date, or there is a more recent open status, no change is needed.~~

a. Here are some examples of the expected status before and after this DCR:

i. Example 1 (Program has no open status with a Begin Date on or after 09/01/2023, program is in a discontinued status on 08/31/2023, so the discontinued status is end-dated effective 08/31/2023 and a high-dated deregistered status is added with a begin date of 09/01/2023):

1. Before:

a. Active: 01/01/2023 – 08/25/2023

b. Discontinued: 08/26/2023 – High Date

2. After:

a. Active: 01/01/2023 – 08/25/2023

b. Discontinued: 08/26/2023 – 08/31/2023

c. Deregistered: 09/01/2023 – High Date

ii. Example 2 (Program has no open status with a Begin Date on or after 09/01/2023, program is in an active status on 08/31/2023, so the active status is end-dated effective 08/31/2023, the discontinued status is removed, and a high-dated deregistered status is added with a begin date of 09/01/2023):

1. Before:

- a. Active: 05/01/2023 – 09/25/2023
 - b. Discontinued: 09/26/2023 – High Date
 - 2. After:
 - a. Active: 01/01/2023 – 08/31/2023
 - b. Deregistered: 09/01/2023 – High Date
- iii. Example 3(Program has an open status with a begin date prior to 09/01/2023, but has a newer open status that began on or after 09/01/2023, so no change is needed):
 - 1. Before:
 - a. Active: 05/01/2023 – 09/15/2023
 - b. Discontinued: 09/16/2023 – 09/28/2023
 - c. Active: 09/29/2023 – High Date
 - 2. After:
 - a. Active: 05/01/2023 – 09/15/2023
 - b. Discontinued: 09/16/2023 – 09/28/2023
 - c. Active: 09/29/2023 – High Date
- iv. Example 4(Program has its first status on or after 09/01/2023, so no change is needed):
 - 1. Before:
 - a. Active: 09/02/2023 – 09/15/2023
 - b. Discontinued: 09/16/2023 – 09/28/2023
 - c. Active: 09/29/2023 – High Date
 - 2. After:
 - a. Active: 09/02/2023 – 09/15/2023
 - b. Discontinued: 09/16/2023 – 09/28/2023
 - c. Active: 09/29/2023 – High Date

2.1.3 Estimated Number of Records Impacted/Performance

49,580

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-517	The LRS shall allow COUNTY-specified Users to record and track the applicant s/participant s actual needs, including immediate needs, emergency needs (domestic violence, expedited CalFresh services, supportive services, homeless, medical services), and crisis intervention needs separately. - Application Registration and Application Evaluation - 2.4.1.2	This DCR updates CFET programs to record the case's needs correctly.

4 OUTREACH

4.1 Lists

List Name: CA-265535 Records this Data Change was applied to.

List Criteria: All records mentioned in Section 2.1

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- Program
- Program Status
- Begin Date
- End Date

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-265535