



California Statewide Automated Welfare System

A large, abstract graphic element consisting of several concentric circles. The circles are colored in a gradient: the innermost is light blue, followed by a darker blue, then a light grey, and finally a darker grey. The circles are slightly irregular and overlap each other, creating a sense of depth. The word "Design" is centered within the light blue circle.

Design

CA-275191

[Update CalFresh and CalWORKs indigent Functionality]

CalSAWS	DOCUMENT APPROVAL HISTORY		
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CA-275191 Update CalFresh and CalWORKs Indigent Functionality

1 OVERVIEW

Per ACL 11-06, Sponsorship information is no longer required when determining eligibility to the CalWORKs (CW) and CalFresh (CF) programs for non-citizen applicants reporting indigency. CW and CF EDBC logic will be updated to determine eligibility even when the sponsor information is not provided during the individual's period of indigency.

Additionally, an automated journal entry will document when the individual is within a period of indigency and has an upcoming RE. The SAR 22 and SAR 72 forms will be suppressed as appropriate during the period of indigency.

1.1 Current Design

1. The system automatically generates the SAR 22 and SAR 72 for the CalWORKs and CalFresh programs when the recipient is a sponsored non-citizen.
2. The 'Willing to Comply by Providing Sponsor's Information' field on the Citizenship Status Detail page must be marked as 'Yes' for EDBC to determine eligibility to CW or CF during a period of indigency.
3. The System does not auto-generate a journal when a CW/CF indigent individual is approaching their RE.
4. SAR 22 currently does not generate for CalFresh program.

1.2 Requests

1. Update CW and CF EDBC to evaluate eligibility for non-citizen individuals when sponsorship information is not provided during a period of indigence.
2. Auto-generate a journal entry when the CW or CF program is approaching an RE and includes an individual that will be in a period of indigency.
3. Do not auto- generate a SAR 22 if the sponsored noncitizen is determined to be within their period of indigence.
4. Do not auto- generate a SAR 72 if the noncitizen is determined to be within their period of indigence.
5. Update SAR 22 batch job to allow it to generate for the CalFresh program.

1.3 Overview of Recommendations

1. Update CW and CF EDBC to not require the sponsored noncitizen to provide sponsorship information when determining indigence.
2. Auto-generate a journal entry when the CW or CF program is approaching an RE and includes an individual that will be in a period of indigency.
3. Do not auto- generate a SAR 22 if the sponsored noncitizen is determined to be within their period of indigence

4. Do not auto- generate a SAR 72 if the noncitizen is determined to be within their period of indigence
5. Relocate the “Sponsor abuse with substantial connection between cruelty and the need for benefits” field to above the “Period of Indigence” selection fields within the “Sponsored?” block on the Citizenship Detail Page.
6. Update SAR 22 batch job to allow it to generate for the CalFresh program.

1.4 Assumptions

1. No verbiage or variable population updates will be done to SAR 72 & SAR 22.
2. No additional threshold languages will be added as part of this SCR for SAR 72 & SAR 22.
3. All changes are described in this document; all other functionality is to remain unchanged unless explicitly stated.
4. There will be no change to the current GA/GR and CAPI Indigence logic.
5. The EDBC updates for this SCR will not have a set effective date. All past and future benefit months after implementation will process the same way. No county action or cleanup is needed.
6. Sponsor deemng changes will be applied with CA-276634 in 26.05.
7. The EDBC soft validation “The following verification(s) have not been received:
 - Sponsored Non-Citizen” will continue to display when running EDBC for non-citizen individuals who have not provided sponsor information but are within a period of indigency.
 - CW and CF EDBC will continue to fail non-citizen individuals who have not provided sponsor information, and they are not within a period of indigency.
8. If SAR 22 or SAR 72 is not received, the worker should follow the existing business practice.

2 RECOMMENDATIONS

An individual who is within an indigence period will not be required to provide sponsorship information for CalFresh and/or CalWORKs programs. Due to not being required to provide sponsorship information, a SAR 22 and SAR 72 packets should not be sent for the individuals who are in an indigence period.

2.1 Citizenship Status Detail Page

2.1.1 Overview

The Citizenship Status Detail page is an existing page that allows the worker to create, edit, and view Citizenship Status records for non-citizens associated to the case. Within the Citizenship Status Detail Page there is a section to capture

Sponsorship status and only after selecting "Yes" on the "Sponsored?" drop down section can the worker access the "Period of Indigence" fields.

This SCR updates the Citizenship Status Detail page so that the "Sponsor abuse with substantial connection between cruelty and the need for benefits" field is moved above the "Period of Indigence" selection fields within the "Sponsored?" block on the page.

Citizen Status Detail Page Mockup

Sponsored? * <input type="checkbox"/> Yes	Verified: * <input type="checkbox"/> Pending <input type="button" value="View"/>	
Willing to Comply by Providing Sponsor's Information * <input type="checkbox"/> Yes		
Sponsor abuse with substantial connection between the cruelty and the need for benefits? * <input type="checkbox"/> No	Begin Date: <input type="text"/> <input type="button"/> End Date: <input type="text"/> <input type="button"/>	Verified? * <input type="checkbox"/> No
Period of Indigence		
CalWORKs: <input checked="" type="checkbox"/> Indigent	Begin Date: <input type="text"/> <input type="button"/> End Date: <input type="text"/> <input type="button"/>	
CalFresh: <input checked="" type="checkbox"/> Indigent	Begin Date: <input type="text"/> <input type="button"/> End Date: <input type="text"/> <input type="button"/>	
CAPI: <input type="checkbox"/> Indigent	Begin Date: <input type="text"/> <input type="button"/> End Date: <input type="text"/> <input type="button"/>	
<input type="checkbox"/> Indigent Exception	Begin Date: <input type="text"/> <input type="button"/> End Date: <input type="text"/> <input type="button"/>	
General Assistance/General Relief: <input type="checkbox"/> Indigent	Begin Date: <input type="text"/> <input type="button"/> End Date: <input type="text"/> <input type="button"/>	

Figure 2.1.1 – Sponsorship Sections of Citizenship Status Detail Page (Create/Edit)

2.1.2 Description of Changes

1. The "Sponsor abuse with substantial connection between cruelty and the need for Benefits" drop down, dates, and corresponding "Verified" field will now be beneath "Willing to Comply by Providing Sponsor's Information" field and above the "Period of Indigence" selection fields.

2.1.3 Page Location

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

- **Task:** Citizenship
 - Citizenship Status List
 - Non-Citizens Section
 - Edit Button → Citizenship Status Detail (Edit Mode)
 - Add Button → Citizenship Status Detail (Create Mode)
 - Name Hyperlink → Citizenship Status Detail (View Mode)

2.1.4 Security Updates

N/A

2.1.5 Page Mapping

N/A

2.1.6 Accessibility

Accessibility was assessed and no changes are needed to the Citizenship Status Detail Page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Update Indigent CF functionality for willing to comply with sponsorship information

2.2.1 Overview

A sponsored non-citizen is not required to provide sponsorship information when they are within a period of indigency regardless of if "Willing to comply by Providing Sponsor's information" is marked as No. The sponsored non-citizen should be evaluated for CF program and EDBC should not be halted for not providing verification.

2.2.2 Description of Changes

1. When a non-citizen individual is marked as indigent and the benefit month being run is within the indigency period, EDBC will ignore sponsor related records and evaluate the non-citizen individual for CalFresh benefits.
 - a. When a non-citizen individual has the question "Sponsored?" marked as Yes, and the "Verified" field is Pending or Refused.
 - i. The individual will be evaluated by EDBC for all rules to be able to determine potential eligibility for CF program.
 - b. When a non-citizen individual is Sponsored and the "Willing to Comply by Providing Sponsor's Information" question is marked as No.
 - i. The individual will be evaluated by EDBC for all rules to be able to determine potential eligibility for CF program.

2.2.3 Example Scenarios

Disclaimer: The below scenarios are not requirements. They are meant to help guide understanding and testing and may mention items that are not being changed by the specific language in the requirements.

A sponsored non-citizen Individual states they are sponsored by a non-member. The question "Sponsored?" is marked as Yes, and the question "Willing to comply by providing sponsor's information" is marked 'No'. The customer claims she/he is indigent, the indigent checkbox for CalFresh is selected with a Start Date of 6/1/2025 and End Date of 5/31/2026. EDBC is run for the 10/2025 benefit month. EDBC will evaluate the individual for CalFresh benefits despite the absence of sponsor information.

2.2.4 Programs Impacted

CalFresh

2.2.5 Performance Impacts

No performance impact.

2.3 Update Indigent CW functionality for willing to comply with sponsorship information

2.3.1 Overview

A sponsored non-citizen is not required to provide sponsorship information when they are within a period of indigency regardless of if "Willing to comply by Providing Sponsor's information" is marked as No. The sponsored non-citizen should be evaluated for CW program and EDBC should not be halted for not providing verification.

2.3.2 Description of Changes

1. When a non-citizen individual is marked as indigent and the benefit month being run is within the indigency period, EDBC will ignore sponsor related records and evaluate the non-citizen individual for CalWORKs benefits.
 - a. When a non-citizen individual has the question "Sponsored?" marked as Yes, and the "Verified" field is Pending or Refused.
 - i. The individual will be evaluated by EDBC for all rules to be able to determine potential eligibility for CW program.
 - b. When a non-citizen individual is Sponsored and the "Willing to Comply by Providing Sponsor's Information" question is marked as 'No'.
 - i. The individual will be evaluated by EDBC for all rules to be able to determine potential eligibility for CW program.

2.3.3 Example Scenarios

Disclaimer: The below scenarios are not requirements. They are meant to help guide understanding and testing and may mention items that are not being changed by the specific language in the requirements.

A sponsored non-citizen Individual states they are sponsored by a non-member. The question "Sponsored?" is marked as Yes, and the question "Willing to comply by providing sponsor's information" is marked 'No'. The customer claims she/he is indigent, the indigent checkbox for CalWORKs is selected with a Start Date of 6/1/2025 and End Date of 5/31/2026. EDBC is run for the 10/2025 benefit month. EDBC will evaluate the individual for CalWORKs benefits despite the absence of sponsor information.

2.3.4 Programs Impacted

CalWORKs

2.3.5 Performance Impacts

No performance impact.

2.4 Add Batch Job to generate journals for CalWORKs/CalFresh Individuals who are Indigent

2.4.1 Overview

Create a new batch job to auto create a journal for CalWORKs and CalFresh programs with an upcoming reporting period and the program has a period of indigence with an END DATE after the report due month.

2.4.2 Description of Change

1. CTCR – Create a new journal template in category 363. NOTE: If the participant has both CalWORKs and CalFresh, a single journal entry will be created listing both programs in the description.

Journal Entry	Description
New/Update	New
Journal Category	All
Journal Type	Redetermination, Recertification, Renewal
Short Description	<p>For CalWORKs only: CalWORKs participant is still indigent.</p> <p>For CalFresh only: CalFresh participant is still indigent.</p> <p>For CalWORKs/CalFresh: CalWORKs/CalFresh participant is still indigent.</p>
Long Description	<p>For CalWORKs only: CalWORKs participant <Person Name> has a period of indigence extending beyond the report due month.</p> <p>For CalFresh only: CalFresh participant <Person Name> has a period of indigence extending beyond the report due month.</p> <p>For CalWORKs/CalFresh: CalWORKs/CalFresh participant <Person Name> has a period of indigence extending beyond the report due month.</p>

2. Create a new batch job that generates the new journal when the following criteria are satisfied:
 - a) The individual is a non-citizen who is sponsored.
 - b) The non-citizen has Period of Indigence for the CalWORKs and/or CalFresh programs.
 - c) The program has a due date for RE in the batch run month.
 - d) The Period of Indigence has an End Date on or after the first of the month following the report due month.

2.4.3 Execution Frequency

Monthly – 1st business day.

2.4.4 Key Scheduling Dependencies

Predecessor – Batch EDBC.

2.4.5 Counties Impacted

All counties.

2.4.6 Category

Non-Core.

2.4.7 Data Volume/Performance

Estimated 10,000 records monthly.

2.4.8 Failure Procedure/Operational Instructions

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 Interface Name - No Impact

2.6 eHIT - No Impact

2.7 Update SAR 22 Form Sweep

2.7.1 Overview

Update SAR 22 Form sweep to exclude sponsored non-citizens if determined to be indigent. SAR 22 is not automated with the CalFresh program by batch. As part of this SCR, CalSAWS will be automating the SAR 22 to generate for the CalFresh program.

State Form: SAR 22

Current Programs: CalWORKs, CalFresh

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Template Repository Visibility: All

Existing Languages: Armenian, Hmong, Lao, Russian, Arabic, Farsi, English, Korean, Tagalog, Filipino, Chinese, Spanish

2.7.2 Form/NOA Verbiage

N/A

2.7.3 Form/NOA Variable Population

N/A

2.7.4 Form/NOA Generation Conditions

1. Update SAR 22 Form Sweep

Update SAR 22 Form sweep to exclude sponsored non-citizens if determined to be indigent.

A sponsored non-citizen individual is considered indigent if the indigent checkbox for the corresponding program is selected on the Citizenship Detail page. The sweep will exclude individuals within a period of indigence. When both programs are being evaluated by the sweep, and 1 of them is not within a period of indigency, then the sweep will continue to include the individual and generate the SAR22.

Exemption: If RE Due Month is December and SAR 22 is to be sent for the month of November, allow SAR 22 to generate regardless of the Indigence period.

Disclaimer: The below scenarios are not requirements. They are meant to help guide understanding and testing and may mention items that are not being changed by the specific language in the requirements.

Ex 1: If SAR 22 is generated for CalWORKs, the CalWORKs indigent checkbox is selected with today's date falling within the corresponding indigent period, then the SAR 22 should be excluded.

Ex 2: When SAR 22 is generated for both CalWORKs & CalFresh, and the indigent checkbox is selected for both programs with today's date falling within the indigent periods, then the SAR 22 will be excluded.

Ex 3: When SAR 22 is generated for both CalWORKs & CalFresh, and the indigent checkbox is selected for only one program with today's date falling within one of the indigent period, then the SAR 22 will be allowed to generate.

2. Update SAR 22 Batch job to generate for the CalFresh program.

Currently, the SAR 22 is not automated for the CalFresh program. As part of this SCR, CalSAWS will be automating the SAR 22 to generate for the CalFresh program at RE.

Ex 1:

If the RE DUE Month for both CalWORKs and CalFresh are the same, only generate SAR 22 once.

Use the primary applicant for CalWORKs in this scenario.

Ex 2: If the RE DUE are not the same for CW and CF, SAR 22 will be generated for their respective programs using their appropriate worker and primary applicant.

Note: If SAR 22 is not received, the worker should follow the existing business practice.

Technical Note: SAR 22 batch number PB00R1921. Indicator for Indigent can be found in table CITZ_QUALFR.

2.8 Update SAR 72 Form Sweep

2.8.1 Overview

Update SAR 72 Form sweep to exclude sponsored non-citizens if determined to be indigent.

State Form: SAR 72

Current Programs: CalWORKs, CalFresh

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Template Repository Visibility: All

Existing Languages: Cambodian, Armenian, Hmong, Lao, Russian, Arabic, Farsi, Vietnamese, English, Korean, Tagalog/Filipino, Chinese, Spanish

2.8.2 Form/NOA Verbiage

N/A

2.8.3 Form/NOA Variable Population

N/A

2.8.4 Form/NOA Generation Conditions

1. Update SAR 72 Form Sweep

Update SAR 72 Form sweep to exclude sponsored non-citizens if determined to be indigent.

A sponsored non-citizen individual is considered indigent if the indigent checkbox for the corresponding program is selected on the Citizenship Detail page. The sweep will exclude individuals within a period of indigence. When both programs are being evaluated by the sweep, and 1 of them is not within a period of indigency, then the sweep will continue to include the individual and generate the SAR 72.

Disclaimer: The below scenarios are not requirements. They are meant to help guide understanding and testing and may mention items that are not being changed by the specific language in the requirements.

Ex 1: If SAR 7 is generated for CalWORKs, the CalWORKs indigent checkbox is selected with today's date falling within the corresponding indigent period, then the SAR 72 should be excluded.

Ex 2: When SAR 7 is generated for both CalWORKs & CalFresh, and the indigent checkbox is selected for both programs with today's date falling within the indigent periods, then the SAR 72 will be excluded.

Ex 3: When SAR 72 is generated for both CalWORKs & CalFresh, and the indigent checkbox is selected for only one program with today's date falling within one of the indigent period, then the SAR 72 will be allowed to generate.

Note: If SAR 72 is not received, the worker should follow the existing business practice.

Technical Note: SAR 72 generation logic exists in `FormsHelper.java` and does not have its own batch job. Indicator for Indigent can be found in table `CITZ_QUALFR`.

2.9 Report Name - No Impact

2.10 Data Warehouse Name – No Impact

2.11 Data Change - No Impact

2.12 Automated Regression Test - No Impact

3 SUPPORTING DOCUMENTS

N/A

4 OUTREACH

4.1 Lists – No Impact

5 APPENDIX

N/A