

# CalSAWS

California Statewide Automated Welfare System



# Design

## **CA-296399**

Update SUAS Logic for ICT cases and LIHEAP Income

| CalSAWS   | DOCUMENT APPROVAL HISTORY |  |          |  |
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|           | Prepared By               | Yale Yee   |          |  |
|           | Reviewed By               | CalFresh Business Analysts, CW/CF Committee, Build Team, Test Team |          |  |
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|           |                           |  |          |  |
|           |                           |  |          |  |

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# CA-296399 – Update SUAS Logic for ICT cases and LIHEAP Income

## 1.1 Current Design

When running CalFresh EDBC, if the household is eligible for SUAS at intake, recertification or if a SUAS payment was issued over 12 months within the certification period. CalFresh households are eligible to SUAS when they meet all the following criteria:

- a. Households contain at least one active elderly or disabled MEM/FRE in the household for the benefit month.
- b. Households do not have SUA expenses for the benefit month.
- c. Households are not receiving the maximum CalFresh allotment for their household size.

When a CalFresh household is determined to be eligible to SUAS, the household will receive a one-time \$20.01 SUAS payment.

Households receive a 'SUAS based SUA' standard expense in the CalFresh EDBC budget determination for a period of 12 months or until the household's recertification/reapplication, whichever is earlier

When a CalFresh household establishes SUAS eligibility during the certification period, the CalFresh household cannot lose SUAS mid-period due to any changes until the next certification or reapplication, whichever is earlier. Incoming ICT cases are redetermined for SUAS eligibility and do not retain the SUAS determination from the sending county within the certification period.

Current SUAS determination on the CalFresh EDBC does not consider Low Income Energy Assistance or Energy Assistance Payments Made Under State Law for the CalFresh household.

## 1.2 Requests

1. Update the SUAS determination to include active elderly or disabled Unaided Person (UP) individuals.
2. Incoming ICT cases should retain SUAS eligibility if the CalFresh household was eligible to SUAS in the sending county within the certification period.
3. For incoming ICT cases that were eligible to SUAS from the sending county and determined not eligible to SUAS in the receiving county, apply a data change to update the SUAS indicator to 'Y' for the CalFresh household for the same certification period.

4. Update the SUAS determination on the CalFresh EDBC to not issue SUAS (\$20.01) when the any MEM/FRE/UP in the CalFresh household receives either Low Income Energy Assistance or Energy Assistance Payments Made Under State Law.

## 1.3 Overview of Recommendations

1. Update the SUAS determination to include active elderly or disabled Unaided Person (UP) individuals.
2. Create a DCR to update the ICT cases that previously had SUAS in the budget to continue setting the SUAS indicator to 'Y' until the end of the recertification period.
3. Update the CalFresh EDBC rule for ICT cases that set the SUAS indicator to 'Y' in the sending county and will need to retain the SUAS indicator as 'Y' in the receiving county until the next recertification period or reevaluate for SUAS 12 months after the issuance, whichever occurs first.
4. Update SUAS logic to not issue the SUAS allowance (\$20.01) when any MEM/FRE/UP in the CalFresh household receives Low Income Energy Assistance or Energy Assistance Payments Made Under State Law income of more than \$20.

## 1.4 Assumptions

1. Intake or RE certifications CalFresh cases processed prior to the implementation of this SCR and determined to be eligible to SUAS shall remain eligible until the next recertification.
2. The \$20.01 SUAS payment shall not be issued for prior months. This functionality shall remain unchanged with the implementation of this SCR.
3. CalFresh Households can receive more than one SUAS payment within a 12-month period due to multiple certification periods that can occur with reapplications. This functionality remains unchanged.
4. Households can qualify for SUAS during any month of the certification period. For CalFresh households certified for 12, 24, or 36 months, the system will reassess SUAS eligibility every 12 months from the time of SUAS eligibility that issued the household \$20.01 payment. This functionality shall remain unchanged with the implementation of this SCR.
5. The \$20.01 SUAS issuances are not subjected to overpayment collections. This functionality shall remain unchanged with the implementation of this SCR.
6. Per clarification from CDSS ongoing cases with 24/36 months RE that are no longer eligible to SUAS based on the new policy from ACL 25-68 due to changes in case circumstances will be eligible to 'SUAS bases SUA' for a period of 12 months or recertification whichever occurs first.
7. If a CalFresh household qualifies for a Homeless Shelter Deduction, EDBC provide Homeless Shelter Deduction when beneficial even if the household incurs SUA utility expense or qualifies for SUAS or SUAS based SUA standard expense. This functionality shall remain unchanged with the implementation of this SCR.
8. CalFresh will determine SUAS in the current month and onward and will not determine SUAS for retro months.

## 2 RECOMMENDATIONS

### 2.1 [Online] - No Impact

### 2.2 Update SUAS Determination for Unaided Person (UP)

#### 2.2.1 Overview

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When running CalFresh EDBC, if the household is eligible for SUAS at intake, recertification or if a SUAS payment was issued over 12 months within the certification period. CalFresh households are eligible to SUAS when they meet all the following criteria:

- a. Households contain at least one active elderly or disabled MEM/FRE/UP in the household for the benefit month.
- b. Households do not have SUA expenses for the benefit month.
- c. Households are not receiving the maximum CalFresh allotment for their household size.

#### 2.2.2 Description of Changes

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1. Update the SUAS determination to include active elderly or disabled Unaided Person (UP) individuals.

#### 2.2.3 Example Scenarios

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N/A

#### 2.2.4 Programs Impacted

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CalFresh

#### 2.2.5 Performance Impacts

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N/A

## 2.3 Update SUAS Indicator for ICT cases

### 2.3.1 Overview

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When a CalFresh household establishes SUAS eligibility as 'Y' during the certification period, the CalFresh household cannot lose SUAS mid-period due to any changes until the next certification period. Incoming ICT cases will retain the SUAS determination of 'Y' if the CalFresh household was determined eligible to SUAS within the certification period from the sending county.

### 2.3.2 Description of Changes

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1. Update the SUAS determination on the CalFresh EDBC to set the SUAS indicator to 'Y' for an application when all the following conditions are met:
  - a. The Source of the CF program is 'ICT' in the receiving County case.
  - b. The most recent status for the ICT is 'Complete'.
  - c. The benefit month is on or before the RE Date on the incoming ICT for CalFresh.
  - d. The SUAS allowance (\$20.01) was issued less than 12 months from the benefit month begin date in the sending county.
  - e. The receiving county CalFresh RE Due Date is the same as ICT RE Due Date for CalFresh.

### 2.3.3 Example Scenarios

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**Disclaimer:**

The below examples are intended to help guide the understanding of the recommendations and may mention items that are not being changed by the specific language in the requirements. The below examples are not intended to replace any recommendation detailed above.

**ICT Case during Recertification Period**

**Example 1:** A CalFresh household of 2 with an elderly member applies for CalFresh benefits in County A. CalFresh benefits are approved for 01/2026 and the household is eligible for SUAS. The SUAS indicator is set to 'Y' on the CalFresh EDBC. A SUAS payment of \$20.01 was issued to the CalFresh household for the benefit month of 01/2026. A 36-month RE period is created from 01/2026-12/2028. An ICT is created from County A to the receiving county (County B) starting 10/01/2026. On the ICT for the CalFresh program, the CalFresh household received a SUAS allowance on 01/2026. In the receiving county when running EDBC for the Pending CalFresh program for the benefit month of 10/2026, the SUAS Indicator will be set to 'Y' until 12/2026 and the CalFresh household will be evaluated for SUAS on 01/2027 automatically in the system.

### 2.3.4 Programs Impacted

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CalFresh

### 2.3.5 Performance Impacts

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A query will be added to search for SUAS payment in the sending county.

## 2.4 Update SUAS Determination for LIHEAP Income

### 2.4.1 Overview

CalFresh EDBC considers 'Low Income Energy Assistance' or 'Energy Assistance Payments Made Under State Law' income for the CalFresh household when determining SUAS eligibility for households.

### 2.4.2 Description of Changes

1. Update the SUAS determination on the CalFresh EDBC to set the SUAS indicator to 'No' when all the following conditions are met:
  - a. Any active MEM/FRE/UP in the CalFresh household receives either 'Low Income Energy Assistance' or 'Energy Assistance Payments Made Under State Law' income for a total of an amount greater than \$20 anytime within the benefit month or the preceding 12 months within the same certification period.
  - b. The CalFresh household did not receive a SUAS payment of \$20.01 for the benefit month or the preceding 12 months within the same certification period.
2. Update CalFresh EDBC logic to apply 'SUAS based SUA' standard expense when the active elderly or disabled MEM/FRE/UP receives either 'Low Income Energy Assistance' or 'Energy Assistance Payments Made Under State Law' income for a total of an amount greater than \$20 anytime within the benefit month or the preceding 12 months within the same certification period.

### 2.4.3 Example Scenarios

#### **Disclaimer:**

The below examples are intended to help guide the understanding of the recommendations and may mention items that are not being changed by the specific language in the requirements. The below examples are not intended to replace any recommendation detailed above.

#### **Elderly Disabled Member Receives LIHEAP Payment**

**Example 1:** A CalFresh household of 2 with an elderly member and their spouse applies for CalFresh benefits starting in the benefit month 01/2026. The elderly member receives Low Income Energy Assistance income for \$30. When the CalFresh EDBC is run for the benefit month of 01/2026, the CalFresh Household is eligible for the 'SUAS based SUA' standard expense and will not be issued SUAS allowance for \$20.01. The SUAS indicator on the CalFresh EDBC is set to 'N'.

#### **LIHEAP Payment Received after SUAS Allowance Issued**

**Example 2:** A CalFresh household of 2 with an elderly member and their spouse applies for CalFresh benefits starting in the benefit month 01/2026. When the CalFresh EDBC is run for the benefit month of 01/2026, the CalFresh Household is eligible for the 'SUAS based SUA' standard expense and will be issued SUAS

allowance for \$20.01. The SUAS indicator on the CalFresh EDBC is set to 'Y'. A 36-month RE period is created from 01/2026-12/2028. For the benefit month of 05/2026, the elderly member receives Energy Assistance Payments Made Under State Law in the amount of \$35. When running CalFresh EDBC for 05/2026, the SUAS indicator on the CalFresh EDBC will continue to be set to 'Y' and 'SUAS Based SUAS' standard expense will be applied.

The CalFresh household is reevaluated for SUAS in the benefit month of 01/2027 since the latest SUAS payment was made 01/2026. When the CalFresh EDBC is run for the benefit month of 01/2027, and since the elderly member received Energy Assistance Payment Made Under State Law in 05/2026, the CalFresh household is eligible for the 'SUAS based SUA' standard expense and will not be issued SUAS allowance for \$20.01. The SUAS indicator on the CalFresh EDBC is set to 'N'.

### **CalFresh household Reapplies - Continuation from Example 2**

**Example 3:** The CalFresh household is discontinued and reapplies for the benefit month of 02/2027. The elderly member does not receive Energy Assistance Payment Made Under State Law. When the CalFresh EDBC is run for the benefit month of 02/2027, the CalFresh Household is eligible for the 'SUAS based SUA' standard expense and will be issued SUAS allowance for \$20.01. The SUAS indicator on the CalFresh EDBC is set to 'Y'. A 36-month RE period is created from 02/2027-01/2030.

#### **2.4.4 Programs Impacted**

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CalFresh

#### **2.4.5 Performance Impacts**

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N/A

## **2.5 SUAS Issuance Sweep – PB00F312**

### **2.5.1 Overview**

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The SUAS Issuance Sweep looks for EDBC's from which to issue SUAS benefits from and inserts a record into the ISSUANCE\_TRANSACTION table. The issuance batch process will create issuances for records inserted by the SUAS issuance sweep. Currently the sweep checks to see if SUAS has been issued for the program which the EDBC being considered has been run for. The SUAS Issuance Sweep needs to be updated to not issue SUAS benefits for ICT cases where SUAS was issued on the sending county's case in the last 12 months.

### **2.5.2 Description of Change**

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1. Update the SUAS Issuance Sweep to not issue SUAS benefits for ICT cases where SUAS was issued on the sending county's case in the last 12 months.

### **2.5.3 Execution Frequency**

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N/A

### **2.5.4 Key Scheduling Dependencies**

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N/A

### **2.5.5 Counties Impacted**

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All counties are impacted.

### **2.5.6 Category**

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N/A

### **2.5.7 Data Volume/Performance**

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N/A

### **2.5.8 Failure Procedure/Operational Instructions**

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N/A

## 2.6 [Batch Name] - No Impact

## 2.7 [Interface Name] - No Impact

## 2.8 [eHIT] - No Impact

## 2.9 [Form/NOA Name] - No Impact

## 2.10 [Report Name] - No Impact

## 2.11 [Data Warehouse Name] – No Impact

## 2.12 [Data Change]

### 2.12.1 Overview

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When a CalFresh household establishes SUAS eligibility as 'Y' during the certification period, the CalFresh household cannot lose SUAS mid-period due to any changes until the next certification period. Incoming ICT cases will retain the SUAS determination of 'Y' if the CalFresh household was determined eligible to SUAS within the certification period from the sending county.

### 2.12.2 Description of Change

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1. Create a data change to set the SUAS indicator to 'Y' on the CalFresh EDBC when all the following conditions are met:
  - a. The Source of the CF program is 'ICT' in the receiving County case.
  - b. The most recent status for the ICT is 'Complete'.
  - c. The benefit month is on or before the RE Date on the incoming ICT for CalFresh.
  - d. The SUAS allowance (\$20.01) was issued less than 12 months from the benefit month begin date in the sending county.
  - e. The receiving county CalFresh RE Due Date is the same as ICT RE Due Date for CalFresh.
  - f. The CalFresh EDBC Begin Date is on or after 10/2025 (this is the implementation date of SCR 294576).
  - g. The CalFresh program is currently Active.

### 2.12.3 Estimated Number of Records Impacted/Performance

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~2,000 cases

### 3 SUPPORTING DOCUMENTS

No Impact

## 4 OUTREACH

### 4.1 Lists – No Impact

## 5 APPENDIX

No Impact