

CalSAWS

California Statewide Automated Welfare System



Design

CA-297632

Exempt Grants, Awards, Scholarships or Loans for CW
and CF

DOCUMENT APPROVAL HISTORY

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2/19/2026	Initial Draft		Guillermo Vizcardo
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CA-297632 Exempt Grants, Awards, Scholarships or Loans for CW and CF

1 OVERVIEW

Per Policy, income types 'Awards/Scholarships' and 'Student Grants, Loans - Non-Needs Based' for Educational/Student income should no longer be considered as unearned income as of March 1, 2026. Per AB 42, income types 'Awards/Scholarships' and 'Student Grants, Loans - Non-Needs Based' will be exempted for CW/CF budgets and any currently impacted case will be redetermined that their next reporting SAR7/RE period.

1.1 Current Design

AB 42 exempts any grant, award, scholarship, fellowship, and/or loan conferred for the purpose of attending an institution of higher learning from consideration as income. Therefore, these funds will be excluded regardless of whether they are distributed directly to the educational institution or to the person receiving CalWORKs or CalFresh. This policy is effective March 1, 2026. Income Type 'Awards/Scholarships' and 'Student Grants, Loans - Non-Needs Based' are counted as Unearned income for CalWORKs and CalFresh.

CF School Income Ended Batch EDBC Sweep (PB00E164) runs 1 day before batch 10-day and triggers regular EDBC in all program's mode for CF participants with FRE and MEM role whose income type of 'Grants, Loans – Non-Needs Based' has ended in the month prior to the batch month.

1.2 Requests

Exempt Income Type 'Awards/Scholarships' and 'Student Grants, Loans - Non-Needs Based' for CalWORKs and CalFresh. This policy is effective March 1, 2026.

1.3 Overview of Recommendations

1. Exempt Income Type 'Awards/Scholarships' for CalWORKs and CalFresh
2. Exempt Income Type 'Student Grants, Loans – Non- Needs Based' for CalWORKs and CalFresh
3. Decommission CF School Income Ended Batch EDBC Sweep (PB00E164).

1.4 Assumptions

1. There will be no impact of income classification of any other program unless specified in the recommendations of this design

2. There is no classification impact to income type 'Grants, Loans - Needs Based' with this SCR.
3. There is no impact found to NA 1263 with this SCR
4. A list with currently impacted cases was sent out with Minor release 26.03 through CA-297702 along with workaround for future cases until SCR is released in 9/2026
5. There will be no clean up that is associated with this SCR as currently impacted cases will remain classified as unearned until their next SAR/RE reporting period

2 RECOMMENDATIONS

Per AB-42, Income Type 'Awards/Scholarships' and 'Student Grants, Loans – Non-Needs Based' for CalWORKs and CalFresh needs to be classified as exempted income.

2.1 [Page Name] - No Impact

2.2 CTCR to exempt Awards/Scholarships income type for CW and CF

2.2.1 Overview

Update Awards/Scholarships income type for CalWORKs and CalFresh to be classified as exempted income

2.2.2 Description of Changes

1. Complete a change request for Code_Detl table, catgry =186 where short decode name is 'Awards/Scholarships'
 - a. Update CalWORKs (refer_table_3_Descr) and CalFresh (Refer_table_6_Descer) to be classified as 'Exempt' instead of 'unearned'

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.

1. A household in a CalFresh program has an individual who received an Award, and reports Awards/Scholarships income of \$2500 during SAR7 report
 - a. Income is added to the Income Detail page
 - b. Frequency set as Irregular/Infrequent\$2500 is exempted from the CalFresh budget
2. A household renewing in Oct 2026 for the CalWORKs and CalFresh program has an individual who reports receiving a Scholarship for the new reporting month, the individual reports Awards/Scholarships income of \$380 during the RE.
 - a. Income is added to the Income Detail page
 - b. Frequency set as Weekly

\$380 is exempted from the CalWORKs and CalFresh budgets for NOV 2026

2.2.4 Programs Impacted

CalWORKs
CalFresh

2.2.5 Performance Impacts

No Performance Impact

2.3 CTCR to exempt Student Grants, Loans – Non- Needs Based income type for CW and CF

2.3.1 Overview

Update Grants, Loans – Non-Needs Based income type for CalWORKs and CalFresh to be classified as exempted income

2.3.2 Description of Changes

1. Complete a change request for Code_Defl table, Catgry =186 where short decode name is 'Grants, Loans – Non-Needs Based'
 - a. Update CalWORKS (refer_table_3_Descr) and CalFresh (Refer_table_6_Descer) to be classified as 'Exempt' instead of 'unearned'

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.

1. A household in a CalFresh program has an individual who was given a grant, and reports 'Grants, Loans – Non-Needs Based' income of \$1500 during SAR7 report
 - a. Income is added to the Income Detail page
 - b. Frequency set as Irregular/Infrequent\$1500 is exempted from the CalFresh budget

2. A household renewing in Oct 2026 for the CalWORKs and CalFresh program has an individual who reports receiving a Loan for the new reporting month, the individual reports 'Grants, Loans – Non-Needs Based' income of \$4000 during the RE.
 - c. Income is added to the Income Detail page
 - d. Frequency set as Monthly\$4000 is exempted from the CalWORKs and CalFresh budgets for NOV 2026

2.3.4 Programs Impacted

CalWORKs
CalFresh

2.3.5 Performance Impacts

No Performance impact

2.4 Batch - Decommission CF School Income Ended Batch EDBC Sweep

2.4.1 Overview

Decommission CF School Income Ended Batch EDBC Sweep (PB00E164).

2.4.2 Description of Change

1. Create a BSCR to turn off PB00E164 EDBC Sweep.

2.4.3 Execution Frequency

N/A

2.4.4 Key Scheduling Dependencies

N/A

2.4.5 Counties Impacted

All Counties.

2.4.6 Category

N/A

2.4.7 Data Volume/Performance

N/A

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 [Interface Name] - No Impact

2.6 [eHIT] - No Impact

2.7 [Form/NOA Name] - No Impact

2.8 [Report Name] - No Impact

2.9 [Data Warehouse Name] - No impact

2.10 [Automated Regression Test]

2.10.1 Overview

Create new and update existing regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.10.2 Description of Change

1. Evaluate each system test scenario for the potential of automation. Known exclusionary criteria:
 - a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
 - b. Technical limitations (ex., visual comparison of a static document against a template)
 - c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
 - d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
 - a. Repeatability: The script must be able to execute multiple times between data refreshes.
 - b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario.

3 SUPPORTING DOCUMENTS

No Impact

4 OUTREACH

4.1 Lists – No Impact

5 APPENDIX

No Impact