



Design

CA-297632

Exempt Grants, Awards, Scholarships or Loans

DOCUMENT APPROVAL HISTORY

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2/19/2026	Initial Draft		Guillermo Vizcardo
4/2/2026	1.0	Add requirement for batch	Edgars Reinholds
4/29/2026	1.1	Add requirement for GAGR Classification	Guillermo Vizcardo
5/13/2026	1.2	Added clarification for LA GR to be called out under section 2.3 and title update	Guillermo Vizcardo

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CA-297632 Exempt Grants, Awards, Scholarships or Loans

1 OVERVIEW

Per ACL 26-16, effective March 1, 2026, any grant, award, scholarship, loan, or fellowship awarded for the purpose of attending a higher education institution from consideration as income for the California Work Opportunity and Responsibility to Kids (CalWORKs) and CalFresh programs. These funds will be excluded regardless of whether they are distributed directly to the educational institution or to the person receiving CalWORKs or CalFresh. Changes also apply to Refugee Cash Assistance (RCA) and Trafficking and Crime Victim Assistance Program (TCVAP) programs

1.1 Current Design

Currently, Income Type 'Awards/Scholarships' and 'Student Grants, Loans - Non-Needs Based' are counted as Unearned income for CalWORKs and CalFresh.

In addition, 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

1. Exempt Income Type 'Awards/Scholarships' and 'Student Grants, Loans - Non-Needs Based' for CalWORKs and CalFresh.
2. Update GAGR Classification for specific counties to follow new policy.
3. Decommission CF School Income Ended Batch EDBC Sweep (PB00E164).

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. Update Classification for Income Type 'Awards/Scholarships' for GAGR Automated Solutions counties.
4. Update Classification for Income Type 'Student Grants, Loans – Non- Needs Based' for GAGR Automated Solutions counties.
5. 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 a workaround for future cases until this SCR is implemented.
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 7/RE reporting period.
6. The GAGR automated Solution counties that are not called out in sections 2.4 and 2.5 below, do not need a classification update as income types are already classified as expected.
7. Users must enter any 'Awards/Scholarships' and 'Student Grants', Loans - Non-Needs Based' funds available after 12 months as property/resource in order for the system to count as property as appropriate. CE/MCE logic will still apply and will not be changed with this SCR.
8. RCA and TCVAP programs follow CalWORKs for 'Awards/Scholarships' and 'Student Grants, Loans - Non-Needs Based' income types. TCVAP is administered under the RCA program in the System.

2 RECOMMENDATIONS

Exempt Income Type 'Awards/Scholarships' and 'Student Grants, Loans – Non-Needs Based' for CalWORKs and CalFresh as of March 1, 2026.

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' with a begin date of 3/1/2026

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 CalWORKs/CalFresh household turns in verification of Scholarship income. Worker enters an 'Awards/Scholarships' income record of \$500 with Begin Date of 03/01/2026 and runs EDBC as of March benefit month.
 - a. Income is added to the Income Detail page
 - b. Frequency set as Monthly\$500 is exempted from the CalWORKs/CalFresh budget as of March benefit month

2.2.4 Programs Impacted

CalWORKs
CalFresh
RCA

2.2.5 Performance Impacts

No Performance Impact

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

2.3.1 Overview

Update Grants, Loans – Non-Needs Based income type for CalWORKs, CalFresh and LA GR 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), CalFresh (Refer_table_6_Descer), and LA GR (Refer_table_16_Descer) to be classified as 'Exempt' instead of 'unearned' with a begin date of 3/1/2026

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 CalWORKs/CalFresh household turns in verification of non-needs-based student loans. Worker enters a record a 'Grants, Loans – Non-Needs Based' income record of \$1500 with Begin Date of 03/01/2026 and runs EDBC for March benefit month.
 - a. Income is added to the Income Detail page
 - b. Frequency set as Monthly\$1500 is exempted from the CalWORKs/CalFresh budget as of March benefit month.

2.3.4 Programs Impacted

CalWORKs
CalFresh
RCA
LA GR

2.3.5 Performance Impacts

No Performance impact

2.4 GAGR – Update Income Treatment for Awards/Scholarships

2.4.1 Overview

Update Awards/Scholarships classification for GAGR counties below and end date the previous classification record.

2.4.2 Description of Changes

1. Update GAGR automated solutions program to treat the income 'Awards/Scholarships' for each county as follows with a begin date 03/01/2026:

GAGR Income treatment by County	Values
Contra Costa	Unearned
Kern	Exempt
Orange	Unearned
Placer	Unearned
Sacramento	Unearned
San Joaquin	Unearned
San Mateo	Unearned
Santa Cruz	Unearned
Solano	Unearned
Sonoma	Unearned

2.4.3 Example Scenarios

None

2.4.4 Programs Impacted

GAGR Automated Solutions

2.4.5 Performance Impacts

No Performance impact

2.5 GAGR – Update Income Treatment for Student Grants, Loans - Non-Needs Based

2.5.1 Overview

Update Student Grants, Loans - Non-Needs Based classification for GAGR counties below and end date the previous classification record.

2.5.2 Description of Changes

Update GAGR automated solutions program to treat the income 'Student Grants, Loans - Non-Needs' for each county as follows with a begin date 03/01/2026:

GAGR Income treatment by County	Values
Alameda	Exempt
Contra Costa	Unearned
Kern	Exempt
San Joaquin	Unearned
San Mateo	Unearned
Santa Cruz	Unearned

Solano	Unearned
Sonoma	Unearned
Ventura	Exempt

2.5.3 Example Scenarios

None

2.5.4 Programs Impacted

GAGR Automated Solutions

2.5.5 Performance Impacts

No Performance impact

2.6 Batch - Decommission CF School Income Ended Batch EDBC Sweep

2.6.1 Overview

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

2.6.2 Description of Change

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

2.6.3 Execution Frequency

N/A

2.6.4 Key Scheduling Dependencies

N/A

2.6.5 Counties Impacted

All Counties.

2.6.6 Category

N/A

2.6.7 Data Volume/Performance

N/A

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 [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 [Automated Regression Test]

2.12.1 Overview

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

2.12.2 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