2. Exemptions

2.1 Policy [EAS 42-712]

An individual may not be required to participate in a welfare-to-work activity if she/he qualifies for an exemption. Eligibility Workers (EW) typically determine whether or not an individual is exempt from CalWORKs Employment Services participation. Employment Counselors (EC) also assist with granting exemptions, including completion of CW 2186A and CW2186B for Time on Aid.

The EC may request the EW to review for an exemption by completing a Task Management Tool (TMT) assignment when information is disclosed that suggests the individual may meet one of the exemption criteria. The EC may also contact the EW to process an expired exemption in order to register client or to extend exemption.

Depending on the exemption, the exemption may or may not tick the 60-month CalWORKs Time on Aid (TOA) clock.

Some exemptions also work as TOA extenders.

2.1.1 Exempt Volunteers

To help assist clients to become self-sufficient, the EW and EC is to make every effort to encourage exempt clients to volunteer. However, the 20, 30, or 35-hour per week minimum participation requirements do not apply to exempt volunteers because they may choose to volunteer for less hours. A volunteer who was removed from participation due to not participating may return to participation prior to exemption period ending, but needs to attend an Orientation if client has not participated for more than 30 days.

Note:

Inform volunteer that some activities, such as adult education programs, require minimum weekly enrollment hours based on service provider.

2.1.2 Extender

The term "Extender" refers to past CalWORKs recipients who used their 60-month CalWORKs TOA lifetime limit and were discontinued from the CalWORKs grant. When applying an Extender, there is no retroactivity; which means that the individual in the Safety Net case will be added back to the case (following Beginning Date of Aid Rules) the first of the month, following the month verifications were received, or the first of the following semi-annual period if results in a grant decrease. The EC and EW are to coordinate efforts to ensure clock is unticked when necessary.

Once an individual has reached the CalWORKs 60-month time limit, an extender to that time limit may be granted if **ALL** PARENTS OR CARETAKER RELATIVES of an aided child(ren) meet one of the extenders.

[Refer to "CalWORKs 60-Month Lifetime Limit," page 39-4" in the CalWORKs Handbook for more detailed information regarding counting exemptions/extenders towards CalWORKs and TANF Time Limits and TOA Handbook "Time on Aid Overview," page 1-1].

2.1.3   Exemption

When the exemption is a TOA exemption, a current CalWORKs aided recipient may qualify to have the CalWORKs TOA clock unticked effective the first of the month, the month verifications are received. The EC and EW are to coordinate efforts to ensure the clock is unticked.

Refer to ["Time Limits (EAS 42-302)," page 39-1"] in the CalWORKs Handbook for more detailed information regarding counting exemptions/extenders towards CalWORKs and TANF Time Limits and TOA Handbook ["Time on Aid Overview," page 1-1].

2.2   Under Age 16

A child who is under 16 years old and is not a pregnant or custodial teen parent is exempt from participation in welfare-to-work activities.

2.3   Age 60 or Older

Based on state regulations, an individual 60 years or older is exempt from participation in welfare-to-work activities. This exemption is a TOA exemption and also an extender.

Note:

As a means to assist the county in meeting the Federal WPR, individuals who are between 60 to 65 years of age may participate as volunteers in welfare-to-work (WTW) activities. Staff must make every effort to encourage these individuals to take advantage of the CWES services available to them.

2.4 16, 17 or 18 Years of Age

An individual who is 16, 17, or 18 years old is exempt when he/she is enrolled/attending high school/equivalent school full-time.

An individual who has completed high school who is attending a post secondary program, or planning to attend a post secondary program is also exempt.

> **Note:**
>
> An individual who is 16, 17, or 18 years old and is required to attend school as a welfare-to-work activity or is a pregnant or custodial teen parent under 20 years of age does not qualify for this exemption.

2.5 Pregnancy

Medical verification, such as a CW 61, indicating pregnancy impairment is not required.

A woman who is pregnant during any trimester qualifies for a Pregnancy exemption. Pregnancy verification may include a sworn written statement or verbal attestation by the recipient provided that the recipient submits pregnancy verification (such as a doctor's note with an expected due date) within 30 working days. Therefore, any pregnant recipient shall be granted a 30-day pregnancy exemption and the exemption may continue for the duration of the pregnancy if the pregnancy verification is provided. The EC is to inform client to notify their EW of their pregnancy and to provide the pregnancy verification within 30 days to their EW. The client may also provide a CW 61 to receive a Disability exemption if the pregnancy is resulting in a disability.

Pregnant recipients with a pregnancy exemption may choose to participate as exempt volunteers in WTW activities of their choice with no limitation in hours per week.

> **Note:**
>
> The Pregnancy exemption is not a TOA exemption, but individuals may be eligible for TOA exemption if a Disability exemption is granted with appropriate medical verification, such as a CW 61.

2.6   Disability

An individual who has a disability that is expected to last at least 30 calendar days and that significantly impairs his or her ability to be regularly employed or participate in welfare-to-work activities is exempt from participation in welfare-to-work activities. This exemption is a TOA exemption, and when individual is receiving State Supplemental Program (SSP) benefits, In-Home Supportive Services (IHSS), State Disability (SDI), or Worker's Compensation Temporary Disability Insurance (TDI) benefits, the exemption is an extender.

To qualify for this exemption the individual shall:

1. Provide verification from a licensed practitioner of:

    *   The disability,
    *   The expected duration of the disability, and
    *   The extent to which the disability impairs employment and/or participation in self-sufficiency activities;

AND

2. Actively seek appropriate medical treatment.

Note:

> If a client cannot participate the full 20/30/35 hours per week because of a disability, he/she is exempt. There are no partial exemptions.

2.6.1   Granting CalWORKs Disability Exemptions

If the client's condition impaired his or her ability to be employed or participate in WTW activities and the client provides verification that they were actively seeking treatment prior to the exemption request date, the exemption must be reviewed for retroactive eligibility for the months that verification is provided. If there is a delay in granting the exemption due to reasons outside of the client's control (delay on the part of the doctor to provide the necessary information or County error) and during the delay the client's condition impaired his or her ability to participate in WTW activities, at the time all proper verification is submitted, retroactivity must also be applied based on the date the client began treatment for the disability. In these situations, the client's CalWORKs 60-month time limit must be adjusted accordingly.

If the client was given the required forms for verification and the appropriate timelines to return them to the worker, but verification was not provided, a retroactive exemption does not apply.

Refer to ["Request For Retroactive Disability Exemption," page 36-18].

2.6.2   Authorization to Release Medical Information" (CW 61)

The CW 61 is used by Employment Counselors (EC) to determine if a client has a medical condition that would exempt him/her from CWES activities or limit his/her participation. The EC will complete the "county use" section of the CW 61 and check the box indicating which type of provider must complete the form. The requirement on who can complete the CW 61 depends on whether the information is being used to determine incapacity deprivation (EW does this) or exempt a client from CWES participation.

IF the information is to be used...	THEN the CW 61...
To determine incapacity deprivation,	Must be completed by a licensed physician or certified psychologist.
To verify a medical condition affecting CWES participation,	May be completed by any health care professional licensed or certified by a state to diagnose or treat physical or mental impairments affecting the ability to work or participate in education/training activities.

The client completes Section 1 of the CW 61. Sections 2 & 3 are completed by the provider. The Employment Counselor (EC) must check the appropriate box at the top of Section 2 to indicate the questions the provider must answer.

2.6.3   Exempt-Volunteer

When an individual has a current medical exemption and wants to participate in WTW as an Exempt-Volunteer, the individual must receive medical clearance from the medical provider by submitting an updated medical report that describes restrictions, conditions, or any other information to assist the EC in assigning an appropriate activity.

2.6.4   Physical Capacities" (CW 61A) and "Mental Capacities" (CW 61B)

The CW 61A and CW 61B are used as supplements to the CW 61 to obtain additional information on the client's physical and mental condition when the provider has indicated client can participate but has limitations. These forms will be used to determine if a client needs modification of CWES activities.

The CW 61A and CW 61B will ONLY be used by the Assessment Counselor, and Centralized Exemptions Worker (CEW).

Note:

> Some counties have encountered problems with providers charging a fee for completing the CW 61 form(s). If a provider charges an additional fee for completing the document, Medi-Cal will pay for this cost IF done by a Medi-Cal provider.

2.6.5   Expiration of a Prior Medical Verification

A client who is participating or exempt from CWES activities but has a medical condition limiting the type of activity he/she may perform, must obtain a current medical report if he/she claims the medical condition still exists. Medical reports may be renewed by the client's own medical provider. Reports should be submitted prior to expiration.

2.7   Care of Another

An individual whose presence in the home is required because of illness or incapacity of another member of the household may be exempt. If the ill or incapacitated household member is not on the CalWIN case, with the same address, verification of the household member and the caregiver residing in the same home is required.This exemption is a TOA exemption and also an extender.

The County must determine that the caretaking responsibilities impair the individual's ability to be regularly employed or to participate in welfare-to-work activities.

> **Note:**
>
> If a client cannot participate the full 20/30/35 hours per week because he/she must provide care for an ill or incapacitated household member, he/she is exempt. There are no partial exemptions.

2.7.1   "Doctor Verification" (SCD 1782)

The "Doctor Verification" (SCD 1782) is used when a medical statement is needed to verify the client must remain in the home to care for an incapacitated family member. The information provided by the doctor will verify the family member is disabled and the extent of care needed for that individual. The SCD 1782 must be signed by the doctor or medical facility to be valid.

> **Note:**
>
> Medical reports may be renewed by the client's own medical provider.

2.7.2   Exempt-Volunteer

When an individual who has a current exemption wants to participate in WTW as an Exempt-Volunteer, the individual must receive medical clearance from the medical provider by submitting an updated medical report that describes restrictions, conditions, or any other information to assist the EC in assigning an appropriate activity.

2.7.3 Expiration of a Prior Medical Verification

A client who is participating or exempt from CWES activities but continues to provide care to a disabled household member must obtain a current medical report that indicates presence in the home is still required. Medical reports may be renewed by the client's own medical provider. Reports should be submitted prior to expiration.

2.8 Care of Child 0-23 Months

This is a one-time-only exemption. The parent or other relative who has primary responsibility for personally providing care to one child from birth through 23 months of age.

- After a parent has used this one-time exemption, the parent no longer qualify for it again when there is a break in aid/discontinuance, even if child's age is still within the 0-23 month age period.

- Applies to only one parent at a time in a CalWORKs Unemployed Parent (two-parent) case; however, the parents have the option to alternate which parent is exempt. For example, one parent may receive the exemption for 12 months, and then alternate so that the other parent receives the exemption for the remaining 12 months. In this example, the exemption is fully exhausted after 23 months for both parents and neither parent is eligible to receive it again. This exemption can be swapped only once between the parents.

- In two-parent AUs, both parents can receive this exemption one-time for each qualifying child. However, the clients may not receive the exemption at the same time. One parent would be eligible for one child if the other parent was no longer receiving this exemption for another qualifying child.

- Can be used one-time only for the qualifying child, which means that if for example, the parent uses it for 4 months for a child who is 20 months old and then has another child two years later, he/she cannot use it again for the time remaining (20 months).

- It is optional, which mean that the individual may choose to use the exemption for a subsequent child (or at a later date for the same child), he/she may choose to do so. However, the exemption cannot be granted retroactively when client chooses to use it after he or she previously chose not to use it.

- Does not automatically resolve non-compliance or cure a WTW Sanction (client must request the exemption to become exempt or agree to a curing sanction plan to participate as a mandatory client). However, when the non-compliance process is initiated, the "CalWORKs Exemption Request Form" (CW 2186A) must be provided.

- Stops the CalWORKs 60-Month Time on Aid (TOA) Clock.

- The exemption has no automation and must be selected manually in CalWIN.

- Since the exemption must be requested, the exemption request form CW 2186A and determination form CW 2186B must be completed.

- When the parent(s) no longer qualify for this new one-time only exemption, an evaluation for the other young child exemptions must be done.

> **Note:**
>
> The **Case Comments** type, "Young Child WTW Exemption," has been added to be used to document the client's choice of using, or waiving the exemption for future use.

2.9 Care of Child Under Six Months of Age (One-Time Exemption)

The parent or other relative of a child under the age of six months as of October 1, 2006, who is personally providing care for the child, is exempt from participation in welfare-to-work activities. This exemption:

- Applies to only one parent in a CalWORKs Unemployed Parent (two-parent) case. However, the client has the option to alternate the exemption between parents.

- Can be used only one time under CalWORKs.

> **Note:**
>
> Use **Case Comments** type, "Young Child WTW Exemption," for documenting and discussing exemption with client.

2.10 Care of Subsequent Child(ren) Under Three (3) Months of Age

An individual who has previously used the one-time only exemption based on the care of a child under the age of six (6) months may be exempt for a period of three (3) months upon the birth or adoption of any subsequent child(ren) up to the child turning three (3) months of age.

In a two-parent family eligible for cash aid due to unemployment, the exemption criteria applies to only one parent. However, the client has the option to alternate the exemption between parents.

Note:

Use **Case Comments** type, "Young Child WTW Exemption," for documenting and discussing exemption with client.

2.11   Needy Nonparent Relative Caretaker of Child

A needy nonparent caretaker relative who has primary responsibility for providing care for a child is exempt from participation in welfare-to-work activities when he or she meets either of the following criteria:

• The nonparent caretaker relative is caring for a child who is a dependent or ward of the court, or

• The nonparent caretaker relative is caring for a child who the county has determined is at risk of placement in foster care.

Note:

For an individual to qualify for this exemption, the county shall determine that the caretaking responsibilities are beyond those considered normal day-to-day parenting responsibilities and impair the caretaker relative's ability to be regularly employed or to participate in welfare-to-work activities.

If a client cannot participate the full 20/30/35 hours per week because he/she must provide care for a child listed above, he/she is exempt. There are no partial exemption

2.12   County Specific 60-Month Time Limit Extenders

An extender is given to a client when he/she has received 60-months of CalWORKs as a non-exempt adult, but because of certain criteria is eligible to continue to receive CalWORKs. These individuals will include:

• Learning and/or developmentally disabled individuals who cannot access services,

• Persons pending an SSI determination who appear to have emotional and/or psychiatric barriers, and

• Individuals who did not receive WTW Employment Services.

The extender criteria will be applied on a case-by-case basis. The determination will be made by the Assessment Counselor Supervisor and approved by the SSPM based on information received from Social Workers, Health Care Providers and experts in the field of Learning Disabilities.

Exception:

> The Assessment Counselor Supervisor will not be reviewing extender eligibility for clients who did not receive WTW services. This will be done by the Program unit.

A client who qualifies for the county specific extender due to the non-receipt of WTW services must participate in CWES. Individuals in the other two categories are not required to participate in CWES.

2.12.1   Domestic Abuse Exemption

Domestic Abuse is an exemption that is also a TOA Extender. When an individual has been aided as an adult for 60 months, aid may continue for that adult when the individual is a victim of domestic abuse and it is determined by the CalWORKs Social Worker (SW)/Domestic Violence (DV) Advocate that domestic abuse issues preclude participation in self-sufficiency. The CalWORKs 60-month TOA/WTW participation requirements are waived and the individual is to be added following Beginning Date of Aid Rules, [Refer to "Extender," page 2-1]].This determination must be made by the CalWORKs SW/DV Advocate.

When the Domestic Abuse exemption is applied to a current CalWORKs recipient, the exemption may be applied for prior months on a case by case basis, as per the SW/DV Advocate assessment, to have prior TOA months unticked.

[Refer to CalWORKs Handbook, "CalWORKs 60-Month Lifetime Limit," page 39-4 and "Domestic Abuse," page 30-2] for additional information].

2.13   Medical Exemption Process for Centralized Exemption Worker (CEW)

2.13.1   Tracking Medical Exemptions and Exempt Cases Not Known to CWES

The Centralized Exemptions Worker (CEW) must follow the steps below when tracking medical exemptions for clients unable to participate in CWES, and for exempt cases NOT known to CWES. When the individual is known to CWES and has an exemption lasting less than 6 months, the assigned

EC is to monitor the case. When the cumulative exemption period is 6 months or more, the case is transferred to the CEW for monitoring.

STEP	ACTION
1.	Receives the monthly ESIX1283 "Exemption Due to Expire" listing from designated staff.
2.	Contacts the client and sends the "Notification of CalWORKs Exemption Ending & Appointment" (SCD 6) to inform the client that their exemption will end. The contact and the SCD 6, along with "Authorization to Release Medical Information" (CW 61) or "Doctor Verification" (SCD 1782) must be initiated at least 30 days prior to the exemptions end date.
3.	Take appropriate action based on the client's current situation:

If the medical condition...	Then the CEW must...
Continues,	• Review for possible referral to CalWORKs Social Work Unit for SSI Advocacy, based on referral criteria [Refer to "Referral Criteria," page 7-3]]. • If meets criteria, follows CalWIN Announcement (CA) 85 for initial referral and then emails Social Worker Unit additional information. [Refer to "CEW Referral to CalWORKs SSI Advocacy," page 7-3]]
Is no longer applicable, but other exemption reason(s) exists,	• Obtains necessary verification and submits to IDM, as appropriate. • Enters/Updates appropriate **Data Collection** windows. • Runs/Overrides ES Exemptions, as appropriate, based on the exemption and saves exemptions results. • Completes TMT request to inform the Eligibility Worker to run EDBC and Authorize case. • Documents action in the **Maintain Case Comments** window in CalWIN. **Note:** Assigns the case to the Administrative Unit Exempt caseload. These cases would not have an assigned EC.
Is no longer applicable, and no other exemption condition exists,	Registers the client with CWES. Follow the Registering Exempt Clients Process. [Refer to Section 2.12.2]

2.13.2 Registering Exempt Clients

Follow these steps when a medical exemption or any other exemption that the Centralized Exemption Worker (CEW) is tracking ends:

STEP	WHO	ACTION
1.	CEW	Determines the client is no longer exempt from CWES.
		Updates appropriate Data Collections windows, runs ES Exemptions and saves results. Completes TMT request to inform the Eligibility Worker to run EDBC/Authorize case.
		Documents action taken in the **Maintain Case Comments** window in CalWIN.
		Determines next steps:
		<table><tr><th>If the...</th><th>Then the CEW must...</th></tr><tr><td>WTW case was never assigned to an EC OR WTW case was assigned, but the exemption lasted more than 12 months,</td><td>• Assigns the case to the Orientation Scheduling caseload. • Contacts/Sends the SCD 6 to inform the client that: - The exemption ended, - They are required to participate, and - That they are scheduled to attend an orientation. • Notifies Orientation Scheduling staff via email (with a copy to the supervisor) that the client was transferred to the Orientation caseload.</td></tr><tr><td>Client attended a CWES Orientation within the last 12 months,</td><td>• Runs ES exemptions. • Transfers/Assigns the case to the previous worker. If the previous worker is no longer in the unit/office, obtains new case worker from the control clerk. • Forwards SCD 6 to the prior worker to schedule appointment for the client. **Note:** Notifies the assigned worker and copy the assigned worker's supervisor about the exemption ending and the scheduled appointment. The assigned worker mails the completed SCD 6 to the client.</td></tr></table>
2.	EC	Reviews the case for appropriate activity prior to the scheduled appointment.

2.14 Exemption Process for Continuing Cases

2.14.1 Medical Exemptions

The following steps are used by the EC when the "Authorization to Release Medical Information" (CW 61) reflecting the outcome of the medical evaluation is returned to the EC from the doctor or a non-medical exemption is identified. If the Eligibility Worker receives the medical verifications, they will also take appropriate actions.

STAGE	WHO	ACTION
1.	EC	• Receives the "Authorization to Release Medical Information" (CW 61) or "Doctor Verification" (SCD 1782) or other verification from the client. • Completes the "CalWORKs and Welfare-to-Work Time Limit Exemptions Determination" (CW 2186B) to approve/deny exemption. • Gives or sends the CW 2186B to the client. • Enters comments, including exemption type and end dates, in the **Maintain Case Comments** window in CalWIN. • Completes the "Contact - Action Case Transfer Checklist" (SCD 163T) and submits to supervisor for review. • Submits a copy of the CW 61 and CW 2186B to IDM.
2.	Eligibility Worker	• Receives the "Authorization to Release Medical Information" (CW 61) or "Doctor Verification" (SCD 1782) or other verification from the client. • If the client has a medical condition lasting longer than 30 days, Eligibility Worker updates Data Collection windows and runs exemptions to exempt the client from CWES activities. • If the client does not have a medical condition lasting longer than 30 days or can participate 20/30/35 hours per week, Eligibility Worker registers the client as a mandatory participant for CWES activities, if no other exemptions apply.
3.	CWES Supervisor/ Lead	• Reviews the SCD 163T. • Enters the information in Data Collection to trigger the exemption, if appropriate. • Runs and saves exemptions, as appropriate. • Completes TMT Request to inform the Eligibility Worker of the exemption and to review for State Disability Insurance (SDI) and correct Maximum Aid Payment (MAP) for the Assistance Unit (AU). • Transfers/Assigns the case to the CEW and sends an email with the SCD 163T attached.

2.14.2   Non-Medical Exemptions

The following steps are used by the EC when the client is exempt from the Welfare-to-Work program for other reasons (ie: New born/maximum age):

STAGE	WHO	ACTION
1.	Case Management EC	• Determines the client is exempt and receives appropriate verification. • Enters comments in the **Maintain Case Comments** window in CalWIN, including exemption type and end date. • Completes the "CalWORKs and Welfare-to-Work Time Limit Exemptions Determination (CW 2186B) to approve the exemption. • Gives or sends the CW 2186B to the client. • Submits verification and CW 2186B to IDM. • Completes the "Exemption Case Transfer Checklist" (SCD 163T) and submits to supervisor for review.
2.	Case Management CWES Supervisor	• Reviews the SCD 163T. • Enters the information in data collection to trigger the exemption, if appropriate. • Runs ES and saves exemptions, as appropriate. • Completes TMT request to inform the Eligibility Worker of the exemption. • Notifies the EC that the exemption is completed.
3.	Case Management EC	• Keeps the case and continues to monitor the case until the exemption has expired. • If exemption is more than 3 months submit for Exempt bank transfer.

The following steps are used by the EC when the non-medical exempt ends:

STAGE	WHO	ACTION
1.	Case Management EC	• Determines the exemption is due to end. • Sends the "Notification of CalWORKs Exemption Ending and Appointment" (SCD 6) two weeks before the exemption expires to schedule the client for an appointment to refer him/her to the last activity or sign a WTW 2 for a new activity or renews the exemption. • Arranges support services for the activity, as appropriate. • Runs exemptions to confirm Registered status. • Continues to monitor the client's participation with CWES.

2.15   WTW Exemption Table

The table below, previously posted on the Program page as a CWES Bulletin, provides guidance on how WTW exemptions are generated in CalWIN. Exemptions are based on information entered through **Data Collection** and must be entered by the Eligibility Worker and/or Employment Counselor. The EW will run

exemption through **Wrap Up** by selecting the **Exemption Result** window and confirming the result then saving the selection.

Once the **Wrap-up** steps are followed, the exemption should appear on the Employment Services Sub-system on the **Maintain Participation Information** window on the [Registration] Tab. The table will assist EC's to better communicate with EWs regarding implementation of WTW exemptions.

If a client has been exempt from participation, but wishes to participate at any point, they may be registered as a volunteer participant by CWES staff. The EW may refer the client to a CWES orientation and ask the client to call or email the contact information below to obtain information on the orientation process:

- Call CWES Main Number at: (408) 758-3500

- Email CWES Orientation at: cwesgroupore@ssa.sccgov.org

Note:

Non-Engagement Employment Services staff does not have access to entering information in **Data Collection** and will have to IDM any medical verification or other information needed to determine if the client is eligible for an exemption. The EC will have to communicate with the Engagement Team regarding all exemptions.

Note:

EDBC does not need to be run when implementing the exemptions with the exception of the exemption generated through the individual demographics.
Example: When adding a newborn or adding a new person to the case.

Exemption Based on	WHO	When	Information Collected on Data Collection window	Exemption Generated from	TOA Counts Yes or No CalWORKS/ TANF	
AGE UNDER 16 All children under the age of 16 (Unless pregnant or a custodial teen parent which may be eligible for Cal-Learn)	EW	During Intake or when a child is born	Add child to the **DISPLAY INDIVIDUAL DEMOGRAPHICS SUMMARY** window Exemption trigger fields • Birth date	WRAP UP or ES SUBSYSTEM	NO	NO

Exemption Based on	WHO	When	Information Collected on Data Collection window	Exemption Generated from	TOA Counts Yes or No CalWORKS/ TANF	
SCHOOL ATTENDANCE FULL TIME STUDENTS 16-18 YEARS OLD **Note:** Any teen on this age group, not attending school must be register with Employment Services. To register, complete the ATTENDANCE INFORMATION tab by entering "N" on the attending school full time field then selecting the appropriate reason on the enrolled status field and entering an "N" on the attending school field and the reason	EW	At intake or in a continuing case where there are a teens who turns 16, 17 & 18 years old and are attending school full time.This information must be updated every year or at every RRR	Add the **DISPLAY STUDENT SUMMARY** window and complete **SCHOOL INFORMATION** tab and **ATTENDANCE INFORMATION** tab Exemption trigger fields • All mandatory fields • Certificate/ Degree/Diploma enter "N" • All Verification source field • Enrolled status • Attending school "Y" • Effective begin date **Note**: When updating information, the effective begin date and the QR window must be updated	WRAP UP or ES SUBSYSTEM	NO	NO
60 YEARS OLD OR OLDER	EW	At Intake or when an individual turns 60 years old	Add an individual to the **DISPLAY INDIVIDUAL DEMOGRAPHICS SUMMARY** window. Exemption trigger fields • Birth date	WRAP UP or ES REGISTRATION TAB	NO	YES

Exemption Based on	WHO	When	Information Collected on Data Collection window	Exemption Generated from	TOA Counts Yes or No CalWORKS/ TANF	
DISABILITY **(Employability status on the DISPLAY EMPLOYABILITY SUMMARY window should be <u>Unemployable</u> with the begin date and end date of the disability period)**	EC	Medical verification is provided by the client or forwarded to the EC	Enter information on the **DISPLAY DISABILITY/MEDICAL CONDITIONS SUMMARY** window and the **COLLECT DIAGNOSIS DETAIL information** child window Temporary- enter begin and end date in both windows. Permanent exemption- enter the begin date only in both windows since CalWIN will enter the next RRR due date as the end date for the exemption Exemption trigger fields • All mandatory fields • Claim disability "Y" • Diagnosis • Verification source	WRAP UP or ES REGISTRATION TAB	NO	YES
CARE FOR ILL OR INCAPACITATED MEMBER (living in the same home) **(The employability status on the DISPLAY EMPLOYABILITY SUMMARY window should remain <u>Employable)</u>**	EC	Verification is provided	Enter information on the **DISPLAY EMPLOYABILITY SUMMARY** window Exemption trigger fields • Exemption begin and end date • Expiration date • Review date • Care giver of ill or incapacitated household member "Y" • Verification Source	WRAP UP or ES REGISTRATION TAB	NO	YES

Exemption Based on	WHO	When	Information Collected on Data Collection window	Exemption Generated from	TOA Counts Yes or No CalWORKS/ TANF	
NEEDY NON PARENT RELATIVE CARING FOR A CHILD WHO IS A DEPENDANT/WARD OF THE COURT OR CHILD AT RISK OF PLACEMENT IN FOSTERE CARE (The employability status on the **DISPLAY EMPLOYABILITY SUMMARY** window should remain <u>Employable</u>)	EW	Verification is provided	Enter information on the **DISPLAY EMPLOYABILITY SUMMARY** window Exemption trigger field • Birth date • Expiration date • Review date • Care giver of dependent, ward of the court or child at risk of foster care "Y" • Verification source	WRAP UP or ES SUBSYSTEM	NO	YES
CARE OF SUBSEQUENT CHILDREN UNDER 3 MONTHS OLD **Note:** All cases with application date before 10/1/06 or continuing cases with a child born before 10/1/06 will received the CARE OF SUBSEQUENT CHILDREN UNDER 6 MONTH OLD exemption as before	EW/ EC	Newborn is added to the case.	Enter information on the **DISPLAY INDIVIDUAL DEMOGRAPHICS SUMMARY** window. Exemption trigger field • Birth date **Note:** CalWIN must be overridden after the child turn 4 months old for the client to be refer to Employment Services. If the client meets the child under 6 months of age one-time exemption rule the exemption will stay until the child turns 6 months old. To override: run exemptions through the WRAP UP subsystem and change the "Exempt primary caregiver of a child 6 months of age" on the **EXEMPTION RESULT** window by selecting the "No exemption for this aid" from the drop down menu then saving the selection.	WRAP UP OR ES SUBSYSTEM	YES	YES

Exemption Based on	WHO	When	Information Collected on Data Collection window	Exemption Generated from	TOA Counts Yes or No CalWORKS/ TANF	
CARE FOR CHILD UNDER 6 MONTHS OLD **Note:** All cases with application date before 10/1/06 or continuing cases with a child born before 10/1/06 will received the CARE OF CHILD UNDER 1 YEAR OLD exemption as before	EW/ EC	Newborn is added to the case and the client has never gotten the exemption before. This is a one-time exemption under CalWORKs	Enter information on the **DISPLAY INDIVIDUAL DEMOGRAPHICS SUMMARY** window Exemption trigger field • Birth date	WRAP UP OR ES SUBSYSTEM	YES	YES
DOMESTIC ABUSE **MANUAL EXEMPTION**	EW/ EC	Social worker exemption request is received directly from the social worker or forwarded by the EC	Enter the information on the **DISPLAY DOMESTIC ABUSE DETAIL** window and override the system through WRAP UP by overriding CalWIN's "NO EXEMPTION FOR THIS AID" result on the **EXEMPTION RESULT** window and selecting the "Manual Exemption-DOMESTIC ABUSE (CalWORKs 60-month time limit waiver)" reason from the drop down menu then saving the selection.	WRAP UP OR ES SUBSYSTEM	NO	YES
PREGNANCY **(Exempt: Participant is Pregnant)** As soon as the client informs their worker of the pregnancy, the client is eligible for the Pregnancy exemption.	EW	When client informs their worker. Client will have 30 days to provide pregnancy verification to continue with the exemption.	Enter information on the **COLLECT PREGNANCY DETAILS** window Exemption trigger fields • All mandatory fields • Effective begin date • Verification source **Note:** EW will follow CalWORKS BENDS for triggering the exemption and issuing the special needs payment.	WRAP UP	YES	YES