

Notes from Peri Weisberg from San Francisco Human Services Agency on using aid codes to identify likely eligible CalFresh individuals:

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1. Start with a set of all active Medi-Cal individuals. Important dataset columns are:
 - a. Identifiers. Individual and case-level identifiers
 - b. All Medi-Cal aid codes. In CalWIN, we store aid codes in up to four fields. These fields may contain the final aid code(s) as well as other aid codes. I used all four fields, after confirming with our Medi-Cal program analyst that an aid code would only be stored in any of these fields if the client was indeed eligible for assistance under that aid code.
 - c. Any additional information required to evaluate whether an individual is an active Medi-Cal client. In CalWIN, we must take an extra step to evaluate a client's status for Medi-Cal: we consider each client's eligibility status for primary, secondary, and QMB aid codes and confirm that the status was "Pass" for at least one of these. I'm not sure if C-IV has a similar hurdle.
 - d. Case-level attributes, including case size and case income (to generate an estimate of FPL), case language, and contact information.
 - e. An indicator of whether the client is already enrolled in CalFresh.
2. Set up a new table with a row for each of the Medi-Cal aid codes in the methodology document Diana developed, accompanied by the appropriate CalFresh eligibility status. In my table, there were three possible statuses: "Likely Eligible," "Excluded," and "Unknown."
3. If you're using a relational database, join each of the aid code columns in your starting dataset to the aid code table from Step 2, in order to pull in the according eligibility status (if you're using statistical software like I was, you'll execute this join via a "merge," but the basic operation is the same). Since I had four aid code columns, this process generated four new columns that could hold an eligibility status. I named the columns Status1, Status2, Status3, and Status4.
4. Remove individuals without at least one valid Medi-Cal aid code. I did this by removing individuals with null values for each of the status columns, based on the logic that they did not have any successful merge/join to the table holding all valid Medi-Cal aid codes.
5. Establish a final status field for each individual, based on statuses in the new columns. Here's how I did it:

```
generate FinalStatus="Unknown"      // to make the contents of the new field "Unknown" for
all individuals
replace FinalStatus="Likely Eligible" if      /// to overwrite the FinalStatus if any of the
statuses are "likely eligible"
    Status1=="Likely Eligible" OR
    Status2=="Likely Eligible" OR
    Status3=="Likely Eligible" OR
    Status4=="Likely Eligible"
```

replace FinalStatus="Excluded" if
statuses are "excluded"

/// to overwrite the FinalStatus if any of the

Status1=="Excluded" OR
Status2=="Excluded" OR
Status3=="Excluded" OR
Status4=="Excluded"

6. The potential population for inreach is everyone on your resulting list who has a Final Status of "Likely Eligible" and who is not already on CalFresh. We further refined this group with a couple additional steps. However, we may revisit these conditions after our initial rounds of outreach:
 - a. We calculated an estimate of FPL for each case (using case income and household size) and capped it at 100%.
 - b. We identified cases that already had partial CalFresh enrollment and removed everyone in those cases.
 - c. We identified cases that one or more members with an "Excluded" status and removed everyone in those cases.