

CALFRESH: TRANSITION TO SEMI-ANNUAL REPORTING

Tawny Macedo, CDSS

Jeannie McKendry, CDSS

Erin Horgan, CWDA



WHAT IS SAR?

- ▶ Semi-Annual Reporting replaces Quarterly Reporting
 - ▶ CalFresh
 - ▶ CalWORKs
- ▶ In line with the national shift to Simplified Reporting
- ▶ AB 6 (2011)
- ▶ County implementation window
 - ▶ April 1, 2013 to October 1, 2013

SAR KEY POINTS

- ▶ Will require one income/eligibility report (SAR 7) and one annual redetermination/recertification.
- ▶ Maintains most current voluntary and mandatory mid-period reports and county-initiated actions.
 - ▶ Recipients may continue to voluntarily report anything that may result in an increase of benefits at any time.
 - ▶ Counties may *generally* only act on voluntary information that results in an increase in benefits to the recipient households.
 - ▶ *Exception for household composition change reports in CalFresh-only households. Counties must act whether this report results in an increase or decrease in benefits.

SAR KEY POINTS

- ▶ New for CalFresh: Income Reporting Threshold (IRT)
 - ▶ “The amount that would render the household ineligible for CalFresh” – 130% FPL
 - ▶ CalFresh households required to report mid-period when this threshold is exceeded
 - ▶ Different IRTs for CalFresh and CalWORKs
 - ▶ CalFresh benefits are recalculated when recipient reports that the CalWORKs IRT has been exceeded.

DIFFERENCES BETWEEN QR7 AND SAR7

SAR 7

- ▶ One SAR 7, one RD/RC
- ▶ Asks only that recipients report *changes* since last report
- ▶ Income question changed:
 - ▶ Now, two questions – earnings, other income
 - ▶ Focus on data month and known changes to come

QR 7

- ▶ Four QR 7s, one RD/RC
- ▶ Asks that recipients re-report and re-verify *all* information in each report
- ▶ Income question on the QR 7 asks recipients to anticipate an exact amount of income for each month of the quarter.

CHANGES TO SAWS 2 UNDER SAR

- ▶ SAR 7 *not* required during the month that a recipient must submit a SAWS 2 for the redetermination/recertification.
- ▶ Revision to Question 20.
 - ▶ Asks recipient to report any known changes to income
 - ▶ Provides sufficient information to workers to calculate benefit amounts
- ▶ SAWS 2 for recertifications/redeterminations must be returned to the CWD by the 15th of the month it is due to be considered timely.
 - ▶ Allows time for counties to give recipients adequate (10-day) notice in the event that benefits must be decreased or discontinued.

COUNTY PREPARATION FOR SAR

- ▶ Each of the SAWWS consortia members are preparing
 - ▶ System changes programming underway
 - ▶ Online demonstration and webcast sessions in advance of “go live” (C-IV)
 - ▶ County IT training materials being developed
- ▶ Counties are preparing
 - ▶ With available materials, counties are preparing trainings for staff
 - ▶ Awaiting CalFresh-specific SAR ACL for key implementation information
 - ▶ Informational fliers to accompany last rounds of QR 7 mailings in some counties
 - ▶ Marketing campaigns for informing staff, outreach partners, and clients being developed in some counties
- ▶ All counties anticipate an October 1, 2013 implementation date

SAR IMPACT ON CLIENTS

- ▶ Simpler reporting requirements and alignment with CalWORKs will decrease “churn”
- ▶ Potential increase in CalFresh access and utilization
 - ▶ Four states saw increases in participation after a move to semi-annual reporting, according to the USDA

SAR RESOURCES

- ▶ All County Letter (ACL) 12-25
- ▶ ACL 12-59
- ▶ ACL 13-08
- ▶ <http://www.dss.cahwnet.gov/lettersnotices/PG931.htm>

QUESTIONS