

CalFresh Elimination of Change Reporting Webinar Q&A

1. Will the PowerPoint be made available after the webinar?

Answer: Yes, the PowerPoint presentation will be emailed to attendees, posted on the CDSS extranet as well as the CDSS YouTube channel. The Q&A section will also be transcribed and made available.

2. When will the CF 23 SAR be sent out by C-IV?

Answer: Yes C-IV will be sending out the CF 23 SAR. This will happen in June effective for July 1, 2016 for C-IV counties.

3. Are we able to view the notice that will be sent out to clients? Will the notice include how to complete the SAR 7? Who has the primary responsibility for training the client on how to complete the first SAR they will receive?

Answer: Yes, the [CF 500](#) is posted on the CDSS webpage, linked here as well as in the PowerPoint presentation. The CF 500 does not contain detail on completing the SAR 7. When the SAR 2 is produced it comes with instructions on completing a SAR 7. Existing conversion procedures will be utilized in transitioning clients from CR to SAR.

4. For elderly/disabled households, can we apply good cause every time they submit a SAR 7 during the first 12 months? Or it can only apply once during the 12 months?

Answer: It can apply each time up to the 12 months. Good cause may still be applied after the 12 month grace period on a case by case basis using criteria listed at MPP 40-181.233.

5. If the first SAR 7 is due in May 2017 does good cause apply through May 2018?

Answer: CDSS is issuing a blanket application of good cause for 12 months after conversion for each affected household. This does not prohibit counties from identifying extenuating circumstances. On a case by case basis good cause can be applied any time.

6. The good cause exception has been extended for 12 months past implementation - will someone clarify whether that means that the exception ends for CalWIN counties on June 1, 2017 and July 1, 2017 for C-IV/LEADER?

Answer: This means that the good cause provisions will be allowable for the first 12 month period, by consortia, after implementation. After 12 months the household will have to reapply if good cause cannot be established based on existing criteria.

7. Does this affect CW/CF cases or only CF?

Answer: This change will affect all CF cases that are classified as Change Reporting.

8. Will elderly/disabled households with earned income have a different good cause period, since they have to submit SAR 7s at 6, 12 and 18 months?

Answer: Elderly and disabled households will have the 12 month good cause period. This also applies to households residing on an Indian reservation. These households will actually have the benefit of being able to have good cause applied twice rather than once as households with a 12 month certification period.

9. Is the CF 23 SAR required to be sent at conversion?

Answer: The CF 23 SAR is a required form (substitutes permitted). Current conversion procedures are maintained during the transition from change reporting to SAR. The CF 23 SAR should be sent at conversion to inform the household of their new reporting requirements. A representative from C-IV confirmed that the CF 23 SAR will be sent at conversion.

10. Will IRT letters be going out before conversion?

Answer: Yes, as cases are converted they will be sent the SAR 2 with IRT information.

11. Has CDSS done some outreach to any statewide organizations about this significant change?

Answer: CDSS had a large workgroup that was formed when the legislation to eliminate change reporting first passed. The group had extensive advocate involvement where we discussed what they were going to do to reach out to affected households. The option is still available to work with specific organizations, please email Amber Bonilla (amber.bonilla@dss.ca.gov) with specific suggestions of organizations to be in contact with. We can also draft a flyer as an alternative, if needed.

12. We will allow good cause for the first 12 months, if the SAR 7 is submitted after the submit month will we rescind or restore?

Answer: If it is within the 12 months good cause allowance period you will rescind the discontinuance.

13. Does Solano County bank the rest of the cases and only have special units for these change reporting customers?

Answer: The special units in Solano County are specifically for change reporting, elderly/disabled households.

14. When will the client be notified of their IRT, will it be automated?

Answer: Client's should be notified of their IRT through the issuance of the SAR 2. Conversion procedures remain the same with the elimination of change reporting as they currently are if cases convert from change reporting to SAR.

15. How long will change reporting related forms be available on the CDSS website?

Answer: The forms will always be available with the exception of the CF 500, we are unsure of exact date the form will become obsolete.

16. If a SAR 7 is received late without time for 10 day notice of reduction of benefits, would we establish and OI and does good cause matter?

Answer: If the SAR 7 is received late and contains information that would impact the upcoming months the procedures are the same and would need to be addressed on a case by case basis.

17. Do these households remain CR until their first recertification is due?

Answer: No. They will be converted, by consortia, on a specific date and should follow the same procedures to convert cases. CalWIN counties will convert cases June 1, 2016 and C-IV/LEADER/LRS counties will convert July 1, 2016.

18. Does change reporting going away only affect combo CW/CF cases?

Answer: No, this is for all CF cases, there is a very small number of change reporting cases that are also CW cases.

19. Is the CF 500 sent automatically or will the consortia send it?

Answer: The CF 500 is being sent automatically by the consortia.

20. When cases are converted from CR to SAR is it a requirement to send out the SAR 2 or is it a recommendation?

Answer: It is not mentioned as a mandate in ACL 15-90 – but the SAR 2 is a required form (substitutes permitted) and must be sent to ensure the household is aware of their IRT and reporting requirements.

21. When a change reporting case goes to SAR we send a CF 23 SAR, will this be required with transition?

Answer: Yes, the CF 23 SAR is a required form.

22. Do elderly/disabled households/ARCO cases for CW, without earned income, have to turn in a SAR 7 at 12 months?

Answer: The SAWS 2 PLUS turned in at 12 months for CalWORKs will act as the 12 month contact required for these households. There will not be a SAR 7 required for these cases.

23. Do the affected households remain change reporting until their first SAR 7 or recertification is due and then get a SAR 2? Or will a SAR 2 be mailed in June effective for July (for C-IV)?

Answer: They remain change reporting until the date of conversion, by consortia. A SAR 2 will be mailed to the household in June 2016, effective for July 2016, in C-IV counties.

24. Per ACL 15-90 & 15-90E - 24 month certified elderly, disabled or HH living on an Indian reservation with earned income are required to submit a SAR 7 at 6, 12 and 18 months during their certification period. (6 month reporting interval). 24 month certified elderly, disabled or HH living on an Indian reservation without earned income are required to submit a SAR7 at 12th months during their certification period. (12 month reporting interval).

Questions:

- a. If a voluntary mid-period report is made that the source of income has changed (earned to unearned or vice versa) when is the SAR 7 interval changed? Is the SAR 7 interval change made mid-period or is the change held and acted on at next certification? Does it make a difference if the change is acted on due to a benefit increase or VUR? For CalWIN counties, does the existence of an active employment history record control the SAR 7 interval?

Answer: The same mid-period reporting rules for SAR apply to these households. If the information reported is considered VUR, the county must act within 10 days of the reported change. If the information is not considered VUR, and the report could decrease CalFresh benefits, then the worker should document in the case record, send a no change NOA and follow up at the next SAR 7 or recertification. Example: If an elderly/disabled household voluntarily submits pay stubs for a new job and the income is expected to continue, this is considered VUR and must be

acted on within 10 days of the reported change. The households reporting interval will be adjusted to the 6 month interval and the CalFresh benefit will be recalculated.

- b. In the following examples please explain how the mid-period change would affect the SAR 7 interval:

Example 1: A 24 month cert HH is originally certified as a non-earned income HH with a certification period of 12/15 to 11/17. In 7/16 the HH makes a voluntary mid-certification report that they are now in receipt of earned income. The income is under IRT so no change to the budget is required.

Answer: If the information is not considered VUR then the CWD should document the information in the case record, send a no change NOA and follow up at the next SAR 7 or recertification.

Example 2: Same as above but the change is one that must be acted on because it either results in a benefit increase or is VUR. The agency acts on the change to add an active employment history record with earned income.

Answer: If the information is considered VUR and must be acted on, then the CWD would make the change on the case to require this household to now submit a SAR 7 at 6, 12 and 18 months based on the household's beginning date of aid (BDA). In this case, if the report was made 7/16, the household's first SAR 7 would be due 11/16.

Example 3: Same certification period as above but the HH is certified with earned income therefore are required to submit a SAR7 at 6, 12 and 18 months. Mid-certification the HH reports their earned income terminated. The agency would be required to act on the change if it will result in a benefit increase.

Answer: Yes, the CWD would act on the case, recalculate the CF benefit and change the households reporting cycle to only turning in a SAR 7 at 12 months.

25. Will the consortia be sending out a separate notice besides the CF 500?

Answer: C-IV will be sending out the CF 500, CF 23 SAR and SAR 2. CalWIN will be sending out the CF 500 and SAR 2.

26. Does granting good cause and issuing full benefits for a late SAR 7 due to the elimination of change reporting apply to existing SAR households as well?

Answer: The blanket 12 month period of good cause is approved for households converting from change reporting to Semi-Annual Reporting. Good cause may be granted for existing SAR households at any time, on a case by case basis, if they meet the criteria listed at MPP 63-40-181.233.