

Chapter Six: Maintain Benefits When Eligible

Generally, CalFresh recipients do not receive CalFresh for an indefinite period. When they are certified as approved, the EW will let them know how long they can maintain eligibility without reapplying. This is known as the certification period.

During this certification period, recipients must report certain changes. Recipients are placed into one of two categories: “change reporting” or “quarterly reporting” (soon to be semi-annual reporting). Quarterly reporting households must submit a report every three months (soon to be every six months).

All CalFresh households wishing to continue receiving CalFresh must recertify. Toward the end of the certification period they must complete a new application.

Change Reporting Households

Change reporting households can include those in which household members:

- Are seasonal and/or migrant farm workers
- Reside on an Indian reservation
- Are homeless
- Are all 60 years old or older or all have a disability

These CalFresh recipients are not required to submit routine reports, but instead are required to report certain changes within 10 days of the change.



The changes they are required to report include:

- A change in the source of income or when income starts or stops
- Unearned income changes of more than \$50
- Earned income changes of more than \$100
- Addition or loss of a household member
- Address changes
- Shelter costs if address changed
- Change in child support payments made to a non-household member
- Able Bodied Adults Without Dependents (ABAWD) change in the number of hours worked
- Drug felony convictions
- Change in fleeing felon status
- Violations of parole or probation

These changes can be reported in writing, verbally or in person.

Quarterly → Semi-Annual Reporting Households

All households not classified as “change reporting” must turn in a Quarterly Report (QR7) once every three months. Counties may use a calendar quarter, or it can designate other three-month periods as a quarter. It is important to know the applicable quarter, otherwise the correct reporting and budgeting will not occur.

California “prospectively budgets” on a quarterly basis. This means that the county decides whether a household is eligible and the amount of CalFresh benefit to be issued based on the income the household “reasonably anticipates” it will get in the upcoming quarter. If the household’s income fluctuates (i.e., is not reasonably predictable every month), the EW will average the income over the previous quarter to decide the probable income.

Generally, once the EW determines the benefit amounts, the benefit amounts are frozen for the quarter. If the client has an increase in income during the quarter, the benefit amount will remain the same through the quarter. The EW will remind the client to update their QR7 and the EW will make changes to the benefit amount at the beginning of the new quarter.

If the EW makes a mistake in calculation and the household receives more benefit than they are entitled to receive, the EW will send a notification detailing the mistake to the client and will work with the client to repay the over-issuance by deducting a portion of the

overpayment from upcoming benefit amounts. If income is not reasonably anticipated and then it is received, no over-issuance occurs.

Starting April 1, 2013, counties will start moving toward semi-annual reporting (SAR7). By October 1, 2013, all CalFresh recipients (except “change reporting” households) will be reporting semi-annually.

Grace Period

The QR7 is due on the fifth day of the third month in the quarter, called the “submit month.” If the county has not received the report by the 11th of the month, they will mail a notification to the recipient. In order to avoid being discontinued from CalFresh, the household must submit the report by the end of the first business day following the month in which it was due. If the household fails to turn in the report, they will be discontinued and will have to reapply.

For example, if a report was due on June 5, it can be turned in before June 11 and it will not be considered late. If it is turned in anytime between June 11 and the first working day of July then it is considered late but the household will continue to receive benefits. If by the second working day of July the county has not received the report, the household may no longer receive benefits and may have to reapply.



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Recertification Process

The recertification process includes completing an application and an interview. The county office will send the household a notice when their recertification is about to expire, informing them of the date by which they must recertify to continue to receive benefits. In California, most households are on a 12-month certification period. If everyone in the household is age 60 or older or has a disability, they can be certified for a 24-month period.

Counties cannot waive or extend the recertification period for workload or budget reasons.

The CalFresh office will send the client a notice giving them a chance to reapply before their CalFresh stops. The notice will tell them:

- The date when their certification period ends.

- The date by which they must submit an application for recertification in order to receive uninterrupted benefits.

Recertification Interviews

To apply for recertification, most applicants need an interview. Counties may opt to waive the face-to-face interview for a household that is on quarterly reporting and for households with a member age 60 or older or a member with disabilities. However, a face-to-face interview must be conducted:

- when requested by the household or the household’s authorized representative,
- when the county determines it is necessary to verify conditions of eligibility,

OR

- when the client is in the office submitting an application and wishes to complete the interview.

If the face-to-face is waived, the household can have a telephone interview instead. The county *must* waive the face-to-face interview if all household members are 60 or older, or have a disability. It *may* waive the face-to-face if coming in would be a hardship for the household. If the county cannot do a telephone interview because it must verify eligibility factors, it can do a home visit; it must schedule this visit in advance with the household.

As with the initial application, recipients will need to give the CalFresh office verification at recertification.

Households applying for a new certification period can get expedited (emergency) CalFresh if they qualify. See Chapter Five, *Expedited Service*.

Don't Let the Benefits Expire

If applicants reapply before the 15th day of the last month of their certification period and remain eligible, the CalFresh office can make sure that the benefits continue without any break. If the CalFresh office finds that recipients continue to qualify for benefits, it will recertify them and give them a new certification period.

Retention Issues

CalFresh-eligible clients may lose their benefits if they:

- Miss or ignore letters from their local CalFresh office reminding them to submit required paperwork or notifying them that benefits will terminate
- Do not keep the EW informed about changes to their income, living arrangements, household composition or address as specified when their certification period and type of reporting are established
- Misunderstand that their eligibility can be renewed at the end of the certification period if they continue to be eligible
- Misunderstand when they are to report
- Are concerned about issuance
- Do not understand the notices that they receive



- Do not realize that the deadlines are important
- Fill out the paperwork incorrectly
- Think they have to recertify in person and lack transportation or childcare
- Do not realize that they can reschedule an appointment if the one they are given is not convenient
- Feel uninformed
- Are afraid to ask questions
- Believe the myths they hear about CalFresh

Outreach workers help eligible clients to keep their benefits by:

- Dispelling myths and helping the client to understand the regulations, their rights, and their responsibilities

- Reviewing with the client the renewal paperwork they must use to update the CalFresh office of their situation
- ✎ See *Worksheet F* for the Update Reporting Checklist.
- Identifying paperwork due dates with the client by having them mark the due date on a home calendar and making sure that the client has the contact information for their EW
- Showing the client what the Notices of Action (NOA) from the county look like and reading through these notices to explain them to the client
- Answering questions that the client might have about the paperwork
- Encouraging the client to drop off the required reports to the local CalFresh office in person and get a receipt
- Contacting the client to remind them about their paperwork due date
- Pointing out the question, “Do you want to cancel your benefits?” on any renewal forms and advising clients **not** to mark “Yes” by mistake

Inter-County Transfers

Individuals moving to a different county can receive seamless services through an Inter-County Transfer (ICT) of their CalFresh benefits. Tell your clients to report their change of address

to the original county (include a change in housing costs and/or the number of household members) so the transfer can be started. If the client has moved, they can also advise their new county and get the transfer started.¹

✎ Go to *Regulation Quick Reference Sheet A* for a summary of inter-county transfers.

ICT Process

- In CalFresh-only cases, the *sending county* notifies the receiving county of the initiation of a case transfer and sends the Notice of Action (NA) 1268 to the recipient.
- The previous county of residence will determine continuing eligibility and amount of CalFresh benefits from the most recent Change Report submitted, or QR 7 due during the transfer period, and continue to issue benefits until the expiration of the transfer period (30 days). If only some of the household moves, they can be added to existing households (if applicable) or must apply on their own.
- The new county of residence will contact the former county to initiate an ICT if a recipient seeks benefits while still active in the former county. It also will notify the former county of residence of the outcome of the ICT, and inform the recipient that the case has transferred and about the new benefits amounts going forward.²

¹ <http://foodstampguide.org/moving/>

² California Department of Social Services, *All County Letter No. 11-22*. Accessed September 10, 2012, <http://www.dss.cahwnet.gov/lettersnotices/entres/getinfo/acl/2011/11-22.pdf>