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SEMI-ANNUAL REPORTING SYSTEM CalWORKs Fact Sheet

Background:

The passage of Assembly Bill 6, dated October 6, 2011, requires the replacement of the **Quarterly** Reporting/Prospective Budgeting (QR/PB) System with a Semi-Annual Reporting (SAR) System for CalWORKs. The Bill also requires for the adoption of the SAR system in CalFresh to the extent permitted by federal law, waiver, or directive. SAR is effective **October 1, 2013**.

What's new:

- SAR Assistance Units/Households (HHs) are required to submit one Eligibility Status Report form (SAR 7) once a year followed by an annual Redetermination/Recertification (RD/RC) six months later.
- Eligibility and benefits for a six-month period is based on information provided on the SAR 7 or the RD/RC forms and will continue to be determined using prospective budgeting and reasonably anticipated income.
- Income that is starting or ending mid-period is no longer be averaged over every month of the Payment Period. The income will only be counted in the months the income is reasonably anticipated to be received.
- There is a new, two-tiered CalWORKs Income Reporting Threshold (IRT) structure and grants may be decreased and/or discontinued mid-period based on reports of income over the IRT.
 - Tier 1 – an increase in income of 55 percent of the Federal Poverty Level (FPL) for a family of three.
 - Tier 2 – The amount that is likely to make a family ineligible for CalWORKs.
 - Tier 3 – For CalFresh: The IRT is the amount likely to make a family ineligible (130 percent of the FPL) for each HH size.

What has not changed:

- CalWORKs and associated CalFresh cases required to follow SAR are the same cases required to report under QR/PB;
- Prospective budgeting and reasonably anticipated income will continue to apply;
- Mid-period voluntary and mandatory reporting requirements;
- The 'freezing' of benefit levels mid-period;
- The requirement to report income exceeding the IRT; and
- General Relief cases continue to follow the QR/PB rules.