

# 63-275 Action on Information Reported on the SAR 7

## Table of Contents

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	Section
<a href="#">Changes Reported on the SAR 7</a>	275.1
<a href="#">Processing Changes Reported Mid-Period</a>	275.2
<a href="#">Household Composition Changes</a>	275.3

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## 63-275.1 Changes Reported on the SAR 7

Take prompt action on all information reported on the SAR 7 to determine:

- If the reported information affects the household's eligibility and/or benefit level.
- Continuing eligibility and benefit amount over the remaining months of the certification period based on all eligibility factors including income, resources (for households that are not [Categorically Eligible \(CE\)](#) or [Modified Categorical Eligible \(MCE\)](#)) and household composition.

Determine continuing eligibility using Prospective Budgeting rules based on the information provided on the SAR 7.

The SAR 7 provides eligibility information for the SAR Data Month, changes affecting the household's eligibility since application or recertification, and changes in income and expenses the recipient reasonably anticipates will occur for the remainder of the certification period.

You can generally assume that anticipated changes reported on the SAR 7 were known in the Data Month. If a change occurs in the Submit Month that the household was not aware of in the Data Month, the report will be treated as a mid-period voluntary report unless the change is considered verified upon receipt (VUR).

Changes reported on the SAR 7 resulting in;

- An increase or decrease in benefits are effective the month following the submit month. Refer to [63-284.5](#) for treatment of information reported on the SAR 7 which would result in a voluntary mid-period change in the Submit Month.
- Ineligibility, is effective the end of the Submit Month with timely notice.

63-275.2  
Processing  
Changes  
Reported Mid-  
Period

When a household reports a mandatory or voluntary report mid-period, the information from that report is considered part of the case record regardless of whether it resulted in a mid-period benefit change.

When processing the SAR 7, review the “*Maintain Held Change Notes*” in CalWIN to determine if a change has already been reported mid-period, if the household has provided verification, and if the information is consistent with what was reported mid-period:

- The SAR 7 is not considered incomplete if the information reported on the SAR 7 is consistent with the information voluntarily provided mid-period, the required verification is in file and no additional information is required. Process the report as explained in [63-273.5](#) and [63-274.2\(C\)](#) and determine continuing eligibility and allotment for the remaining 6 months of the certification period.
- If the information on the SAR 7 is not consistent with the information provided mid-period, or the change has not been verified, or additional information is required, the report will be considered incomplete.

63-275.3  
Household  
Composition  
Changes

A household is only required to demonstrate that it is eligible once each semi-annual period based on information reported on the SAR 7 or recertification forms.

Households may voluntarily report changes in household composition during the certification period. When processing the SAR 7, take action on new household composition changes reported on the SAR 7 and household composition changes that were reported mid-period in which you did not take action.

Follow the procedure below when a household reports a new member on the SAR 7:

Step	Action	
1	Call the household to obtain the new household’s member necessary information:	
	<ul style="list-style-type: none"> <li>• Name, relationship, DOB, SSN, income, etc.</li> <li>• Household composition (e.g., living situation, purchasing and prepare meals together with the household (<a href="#">63-101.1-5</a>), restricted household status.</li> </ul>	
	If household ...	Then ...
	Provides the information (e.g., SSN, DOB) and does not need to provide additional documentary evidence (verification)	Add the new household member to the case the month after the submit month.

	Is required to submit a mandatory verification (e.g., income, noncitizen status)	Send a “Y” notice requesting the verification.
2	If the household cannot be reached, send a “Y” notice requesting information and verifications	

- If the household is determined eligible based on Data Month information, I issue benefits for the new member effective the month after the submit month. The new member is required to comply with the verification and work registration requirements.
- If the household’s gross income exceeds the Income Reporting Threshold (IRT), discontinue benefits with timely notice. See [63-1101.6](#), CalFresh IRT table.

Refer to [63-284.9](#) for additional information on household composition changes reported mid-period.

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