

63-286 Multiple Mid-Period Changes

Table of Contents

	Section
Two or More Changes Reported Mid-Period	286.1
Action on Multiple Mid-Period Reports	286.2
Examples of Multiple Mid-Period Changes	286.3

63-286.1 Two or More Changes Reported Mid- Period

In instances where a household reports two or more changes at the same time, evaluate each change:

- In accordance with the SAR rules outlined in 63-282 through 63-285 regarding actions on mandatory reports, voluntary reports and on County-Initiated actions, and
- Separately and according to the sequence of occurrence using the rule that is unique to that type of change. Do not combine the different circumstances to effect a change in benefits resulting from the combined changes.

63-286.2 Action on Multiple Mid- Period Reports

When a household reports multiple changes mid-period, determine if the changes are independent of each other or if they are different events that are part of the same change.

If the changes are ...	Then ...
Independent of each other	<p>Evaluate each change separately and only act on those changes that are:</p> <ul style="list-style-type: none"> • Mandatory reports, • Verified upon receipt (VUR) or • Result in an increase in benefits. <p>Do not determine the net result of two changes. Each change must be acted on only if that change, by itself, is a mandatory report, VUR or would result in a mid-period increase in benefits.</p> <p>Example: A household reports his/her current job ended and that he/she started a new job.</p>
Part of the same change	Treat the report as one change and determine if acting on the change would result in an increase in benefits.

	In cases where one change would increase benefits and the other would decrease it, take action on the change that is VUR or that increases the allotment.
--	---

If the change is not VUR and results in a decrease in benefits, send a “No-Change NOA” to remind the household, to report that change on their next report, SAR 7 or recertification whichever occurs first. Enter as a Held Change for future follow-up any information regarding the change that is not acted upon.

63-286.3
Examples of
Multiple Mid-
Period Changes

Example 1: PACF Case:	
Scenario	<p>The certification period is January through December 2015.</p> <ol style="list-style-type: none"> 1. On January 15, 2015 an Assistance Unit (AU)/household reports that the father moved back into the home. He is working part-time. 2. On February 17, 2015 the AU/household reports that the mother violated conditions of her parole.
Outcome	<p>JANUARY 15, 2015</p> <p>CalWORKs: The worker determines that the father’s earnings will result in a decrease in CalWORKs benefits. The father will not be added to the AU and his income will not be counted in the benefit determination until the next SAR Payment Period following the May 2015 SAR 7.</p> <p>CalFresh; Household composition changes are considered VUR and must be acted on. Request information to add the father to the household using the CF 377.6 (see 63-284.9.B). Add the father to the household and decrease CalFresh benefits effective February 1, 2015 with timely notice after the information is received.</p> <p>FEBRUARY 17, 2015</p> <p>CalWORKs: This is a mandatory report for CalWORKs. Discontinue the mother with timely notice effective February 28, 2015 as she is no longer eligible to CalWORKs. Do not take action to add the father and his earned income at the same time as discontinuing the mother as these are two different changes and they must be treated separately and sequentially.</p> <p>CalFresh Since this is a mandatory report for CalWORKs and</p>

	CalWORKs is taking action to discontinue the mother, the mother will be also discontinued from CalFresh as required per 63-163 .
--	--

Example 2: PACF Case:	
Scenario	<p>The certification period is January through December 2015.</p> <ol style="list-style-type: none"> 1. On February 4, 2015 the household voluntarily reports that the father returned to the home and has no income. 2. On February 5, 2015 the worker requests information to evaluate eligibility for the father. 3. On February 10, 2015 the household reports that the father started working. <p>The father has not been added to the case at the time of the last report.</p>
Outcome	<p>CalWORKs: Since the application to add the father had not been completed before the February 10, 2015 report, you must use the new income to evaluate eligibility for the father.</p> <p>If adding the father and his new income will result in a decrease in aid, do not take action to add the father until the next SAR Payment Period.</p> <p>If the addition of the father and his new income results in the discontinuance of benefits, discontinue CalWORKs for the entire AU at the end of the current SAR Payment Period after his income is reported on the SAR 7.</p> <p>NOTE: If the father had already been added to the AU before he started working, then the second report would have been a separate voluntary report and would not have been acted on until the next SAR Payment Period.</p> <p>CalFresh:</p> <ol style="list-style-type: none"> 1. February 4, 2015. The report of the father returning to the household with no income on February 4, 2015 requires no verification and will increase benefits. Therefore, add the father to CalFresh effective March 1, 2015. 2. February 10, 2015. The report of new income is a separate voluntary report for CalFresh. If the report is not VUR (did not send verification), do not add the income to CalFresh until the next SAR Payment Period. <p>Refer to 63-284.3, Verified Upon Receipt (VUR).</p>

Example 3: PACF Case:	
Scenario	A household reports on the same day that the father moved into the home and has income, and that the mother's earnings have decreased.
Outcome	<p>CalWORKs: Do not evaluate the net result of the two changes, even if the net result would result in an increase in benefits. Act on each change separately.</p> <p>Determine first which change occurred first.</p> <p>If adding father and his income decrease CalWORKs benefits, do not add the father until the next SAR Payment Period after his income is reported on the next SAR 7 or annual redetermination.</p> <p>However, increase CalWORKs benefits due to the mother's income decrease after the household provides verification.</p> <p>CalFresh: First, add the father and his income and decrease benefits after receiving all verifications. Household composition changes are considered VUR. Refer to 63-284.9, Household Composition Changes.</p> <p>Second, take action to recalculate the allotment when the household provides verification of the decrease in income. Refer to 63-284.1, Evaluation of Mid-Period Reports and 63-284.4, Recalculation of Benefits Mid-Period due to Voluntary Reported Changes.</p>

Example 4: NACF Case:	
Scenario	A CalFresh household reports that the dependent care expense is decreasing from \$200 to \$175 and that the mother's income is decreasing.
Outcome	<p>Do not evaluate the net result of the two changes.</p> <p>Increase CalFresh benefits based on the mother's decrease in income as explained in 63-284.1 and 63-284.4.</p> <p>Do not take action to decrease benefits because of the decrease in the dependent care deduction unless the report is VUR (the household provides an affidavit verifying the new dependent care cost amount). Refer to 63-284.3.</p>

Example 5: PACF Case:

Scenario	<ol style="list-style-type: none">1. An AU/household voluntarily reports an increase in income that is under the CalWORKs IRT.2. Later in the same SAR Payment Period, the AU makes a mandatory report of another AU/household member being convicted of a drug felony.
Outcome	<ol style="list-style-type: none">1. CalWORKs: Do not act on the reported increase in income until the next SAR Payment Period because the change will decrease CalWORKs. CalFresh: Take action on the change only if the report of increased income is VUR (all required verifications are received). See 63-284.3.2. CalWORKs: Discontinue benefits for the ineligible (drug felon) member at the end of the month with timely notice. CalFresh: Since this is a mandatory report for CalWORKs and CalWORKs is taking action, discontinue the drug felon from CalFresh, but only if it is a disqualifying drug-related felony. See 63-164.2 and 63-283.9.
