

**County of San Diego, Health and Human Services Agency (HHSA)
CalFresh Program Guide**

Semi-Annual Reporting Form (SAR 7) Process

Number

63-274

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Revision Date:

06/01/2021

Background:

CalFresh (CF) Households (HH) are required to complete Semi-Annual Reporting form (SAR 7) in 6, 12, 18, or 24 month intervals after the Beginning Date of Aid (BDA).

Purpose:

This section includes policies on the SAR 7 process including: Notices of Action (NOA's), late and incomplete reports, timeliness, completeness criteria, good cause and restoration. This section is being reformatted after sunset review.

Policy:

CalFresh HHs must be provided a SAR 7 prior to the end of the data month. HHs are asked to provide their SAR 7 by 5th day of the submit month to ensure timely processing. The report will be considered late if it is received after the 11th day of the submit month.

1. **Missing or Incomplete SAR 7:**

Proper notifications must be provided if the SAR 7 has not been received or is incomplete. An attempt to contact the HH to complete the report or obtain the missing information must be completed after the notification is sent. The attempt must be documented in the case record. Below is a description of the NOA's used when processing the SAR 7:

Notice	Description
X NOA (NA 960X SAR)	Notifies the HH a SAR 7 has not been received. This NOA is generated when a SAR 7 is not received by the 11 th day of the submit month.
Y NOA (NA 960Y SAR)	Notifies the HH a SAR 7 was received and determined to be incomplete. The NOA will include: a list of the missing verifications, what must be done to complete the SAR 7, and a deadline to avoid a discontinuance.
SAR 90 (SAR 90)	Notifies the HH of missing items for a complete SAR 7. This notice is sent after a Y or X NOA has been provided and the SAR 7 submitted continues to be incomplete.

Examples of when to mail a SAR 90 or Y NOA:

Example: Sending a Y NOA	
Scenario	A HH provides a SAR 7 on the 7 th of the submit month, it is assigned and processed on the same day. The SAR 7 is determined to be incomplete due to missing verifications.
Outcome	Staff must mail a Y NOA, because the SAR 7 was submitted by the HH and processed prior to an X NOA being mailed.
Example: Sending a SAR 90	
Scenario	A HH provides a SAR 7 on the 20 th of the submit month, it is assigned and processed on the same day. The SAR 7 is determined to be incomplete due to missing verifications.
Outcome	Staff must mail a SAR 90, because the X NOA was sent to the HH on the 12 th of the submit month.
Example: Sending a SAR 90 after a Y NOA	
Scenario	A HH provides a SAR 7 on the 3 rd of the submit month it is assigned and processed

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	on the same day. The SAR 7 is determined to be incomplete due to missing verifications. A Y NOA was mailed to the HH with a list of pending verifications. The HH provides some missing items on the 8 th of the submit month, however the SAR7 remains incomplete.
Outcome	The HH will be mailed a SAR 90 , because the HH has been previously provided a Y NOA .

NOTE: A SAR 90 and Y NOA will only be considered adequate when they contain the following information: a list of missing verifications, what must be done to complete the SAR 7 and deadline to avoid discontinuance.

2. Prior to Termination:

An attempt to contact the HH will be made via automated telephonic contact, after mailing X NOA, Y NOA or SAR 90. A discontinuance is only valid if the attempt to contact is documented in case records.

3. Extended Filing Date:

Cases that have discontinued when a SAR 7 is not received or is incomplete, will have an opportunity to provide a completed form on the extended filing date. The extended filing date is identified as the first working day after the submit month.

4. Benefit Decreases:

HH's are to be provided timely 10-day notice to decrease or discontinue benefits. When a late SAR 7 is received and there is insufficient time to provide 10-day notice, CF benefits will remain at the prior month level. Refer to 63-303 for more information on adequate and timely notice. Below are some examples regarding decreasing and increasing benefits:

Example: Benefits decreased with timely notice	
Scenario	A HH reports income increase on their SAR 7 on the 10 th of the submit month this will cause a decrease in the HH benefit, the form was processed as complete.
Outcome	Considering there is sufficient time to provide the HH a 10-day notice, the reduction in benefits will take place at the start of the new SAR cycle and no overissuance will be applied.
Example: Benefits decreased and no timely notice available	
Scenario	A HH reports income increase on their SAR 7 on the 27 th of the submit month this will cause a decrease in the HH benefit, the form was processed as complete.
Outcome	There is insufficient time to provide the HH a 10-day notice, benefits will not be reduced for the start of the cycle and will remain at the same level as the submit month. An overissuance will be established.

5. Benefit Increase

10-day notice requirements do not apply to HH's reporting information on the SAR 7 that cause an increase in benefits. Adequate notice is still required. The date eligibility receives verifications causing an increase in benefits, will be the date considered as the month for applying a supplement.

Example: Benefit increase	
Scenario	A HH reports expenses for housing increase on their SAR 7 on the 28 th of the submit month this will cause an increase in the HH benefit, the form was processed as complete.
Outcome	There are no 10-day requirement rules for increases in a HHs benefits.

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	Supplements will be issued for the submit month and if needed for the month following.
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6. Good Cause Evaluation:

An evaluation of good cause must be made after the extended filing date, prior to processing restoration, and no later than the last day of the month following termination. A verbal or written request for good cause can also be made by the HH, presenting their explanation for not meeting reporting requirements. Good cause may exist in the following situations:

- The HH has a mental or physical condition that impedes them from submitting a timely and complete report
- Extenuating circumstances exist that might have contributed to the HH's inability to submit a timely report (i.e., domestic violence)
- Failure to submit a timely and complete report is directly attributable to county error
- The appeals issue is SAR 7 related

Once good cause has been granted the discontinuance will need to be rescinded and benefits restored at prior level and determine if information provided will cause a decrease or increase in benefits. Refer to 63-303 for additional information on adequate and timely notice.

7. Restoration of Benefits:

After discontinuance and determining good cause does not apply, CF HHs are eligible to have their benefits restored at any time in the month following the discontinuance if the reason for the discontinuance is resolved and they were otherwise eligible. Restoration will be applied effective the date the SAR 7 is considered complete. Refer to 63-306 for additional information on restoration.

References:

All County Letters (ACL) 21-24, 18-18 and 18-18E, 15-90, 15-42, 13-57, 13-26, 13-17, 13-08, 12-59, 12-25, 12-25E
ACIN I-58-12
MPP 63-509, MPP 63-504

Sunset Date:

This policy will be reviewed for continuance by 06/30/2024

Approval for Release:



Rick Wanne, Director
Self Sufficiency Services