

63-281 Determination of Eligibility

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63-281.1 Beginning Date of Aid (BDA)

The beginning date of aid (BDA) is the first month for which the household is eligible for benefits. All CalFresh households will be assigned a reporting cycle upon initial application. The Semi-Annual Reporting (SAR) cycle is based on the BDA.

- The recertification month must be aligned with the SAR cycle.
- For Public Assistance CalFresh (PACF) cases, ensure that the CalFresh and CalWORKs cycle and recertification/redetermination are aligned. For example: If a CalFresh applicant is currently receiving CalWORKs, the CalFresh reporting cycle must be aligned with the existing CalWORKs reporting cycle when benefits are approved ([63-272.5](#)).
- A Semi-Annual Eligibility Report (SAR 7) will be processed once a year in the sixth month after the BDA or recertification month.

Refer to [63-272](#) and [CPG 44-270.B](#)

63-281.2 Determination of Initial Eligibility

A household's eligibility will be determined for the month of application by considering the household's circumstances as of the date of the interview. Refer to [63-251.1](#) for exceptions.

- For Non-assistance CalFresh (NACF) households:
 - With no elderly or disabled household members, determine the reasonably anticipated gross monthly income for the certification period and compare it to the gross income eligibility standards (130% of the Federal Poverty Level (FPL)) for the household size to determine if the household is financial eligible, and the net income eligibility standards (100% of the FPL) for the household

size to determine if the household is eligible for benefits. Refer to [63-221](#).

- With an elderly or disabled member, determine the reasonably anticipated net monthly income for the certification period and compare it to the net income eligibility standards (100% of the FPL) for the household size to determine if the household is financial eligible (passes the 100% net income test). Refer to:
 - [63-221](#), Income Tests and Gross Income;
 - [63-254.3-4](#), Calculating Net Income; and
 - [63-120.7-13](#), Modified Categorical Eligibility (MCE).
- For Public Assistance CalFresh (PACF) cases, if the companion CalWORKs case is determined financially eligible, the CalFresh household is considered [categorically eligible](#) and no applicant test is necessary for CalFresh purposes.
- Benefits will be prorated for the initial month of aid.

63-281.3
Verification of
Income to
Determine Initial
Eligibility

To determine initial eligibility and benefit amount for the certification period, request income information based on the guidelines below:

- Income received during the past 30 days will be used as an indicator of the income that is and will be available to the household during the certification period if this income is expected to continue. However, past income will not be used to determine benefits for the certification period if changes in income have occurred and income from the previous month is not indicative of what the household expects to receive during the certification period. In this case, the worker will take into account income that the household reports/estimates as being reasonably anticipated for the certification period.
- If income fluctuates to the extent that a 30-day period alone cannot provide an accurate indication of anticipated income, the worker and the household may use a longer period of income history if it will provide a more accurate indication of anticipated fluctuations in future income.
- Similarly, if the household's income fluctuates seasonally, it may be appropriate to use the most recent season comparable to the certification period, rather than the last 30 days, as one indicator of anticipated income.

NOTE: Exercise particular caution in using income from a past season as an indicator of income for the certification period. In many cases of seasonally fluctuating income, the income also fluctuates from one season in one year to the same season in

the next year.

Do not use past income as an indicator of anticipated income when changes in income have occurred or can be anticipated during the certification period.

INCOME ONLY IN MONTH RECEIVED.

Income anticipated during the certification period will be counted as income only in the month it is expected to be received, unless the income is averaged (refer to [63-282.12](#)).

Whenever an applicant has stable income and does not expect any changes for the certification period, the worker will use either:

- The exact monthly figure that can be anticipated for each month of the certification period, or
- Convert the income to a monthly amount by multiplying weekly amounts by 4.33 and bi-weekly amounts by 2.167 when the income is received on a weekly or biweekly basis.

Refer to:

- [63-282](#), Income Eligibility and Benefit Amount Calculation
- [63-250](#), Month of Application.

NOTE: Lump-sum payments will be counted as a resource starting in the month received and will not be counted as income.

Refer to [63-224.11](#).

NEW HOUSEHOLD MEMBER REPORTED AFTER APPLICATION

If a new household member...	Then the new household member will be added to the case, if otherwise eligible...
Is reported after the date of application, but in the same month,	<ul style="list-style-type: none">• Effective the month of application if the case has not been approved.• The following month if the case has already been approved.
Comes into the home in the month following the month of application and the case has not been approved,	Effective the first of the month following the month of application.
Comes into the home subsequent to the application month and after the case has been approved,	The first of the following month.

Refer to [63-284.9](#), Household Composition Changes Reported Mid-Period.

63-281.4
Determination of
Continuing
Eligibility

Based on the information provided on the SAR 7 or at recertification, determine continuing eligibility as it relates to all eligibility factors, including, but not limited to income, and household composition using prospective budgeting rules as described in [63-282](#).

A. ELIGIBILITY STATUS REPORT (SAR 7)

Use the information on the SAR 7 to determine continuing eligibility and future benefit amounts. The SAR 7 will provide eligibility information for the SAR Data Month, any changes affecting the household's eligibility since the last recertification and any changes in income and expenses the recipient reasonably anticipates will occur for the remaining months of the certification period.

Refer to [63-274](#) and [63-275](#).

B. RECERTIFICATION

Use the information on the recertification form to determine eligibility and benefit for the upcoming certification period.

The application for recertification form will provide eligibility information, any changes affecting the household's eligibility since the submission of the last SAR 7, and any changes in income and expenses the recipient reasonably anticipates will occur in the upcoming certification period. Refer to [63-281.4](#) and [63-304](#).

C. INFORMATION REPORTED MID-PERIOD

If a household makes a voluntary or mandatory mid-period report, the information from that report will be considered part of the case record, regardless of whether it resulted in a mid-period benefit change.

- If the mid-period report is verified, record the information in Case Comments, and either act on the change (if permitted under mid-period changes or will hold action on the change until the next semi-annual period. If the change is held for the next SAR 7 or recertification, the worker will send the "No Change Notice of Action (NOA)" CF 377.4 SAR and enter the information in the *"Maintain Held Change Notes"* page in CalWIN for future follow up. This change does not need to be verified again unless there has been a subsequent change or it is information that needs to be verified every reporting period (e.g., income). Refer to [63-283](#) and [63-284](#).
- If the report was not verified, and does not affect the benefits mid-period, send the "No-Change NOA" CF 377.4 reminding the

household to list the change on the next SAR 7 or annual recertification form as appropriate, and specify the verification that will be required. Enter the information in the “*Maintain Held Change Notes*” page in CalWIN for follow up with the next SAR 7 or recertification, whichever comes first.

At the next SAR 7 or recertification, ensure that information reported on the SAR 7 or recertification form is consistent with what was reported mid-period and will proceed as follows:

- If the information reported on the SAR 7 or recertification form is consistent with information provided in the voluntary or mandatory mid-period report, and the worker has the verification, no further action will be required.
- If the information on the SAR 7 or recertification form is not consistent with unverified information provided mid-period, take action immediately to resolve the discrepancy and determine what the current household situation is. First, attempt to contact the recipient to resolve the discrepancy. Only if unable to contact the recipient or obtain resolution from such contact, consider the SAR 7 or recertification to be incomplete. Refer to [63-274](#) and [63-304](#).

D. COUNTY-INITIATED ACTION

When certain eligibility information becomes known, reevaluate CalFresh eligibility mid-period and take timely action, as appropriate. Refer to [63-285](#).

63-281.5
Recertification

A SAR 7 will not be required at recertification. Use only the recertification form to determine continuing eligibility and benefit amount for the next certification period using reasonably anticipated income and prospective budgeting regulations.

Refer to [63-282.2 and 3](#).

To determine eligibility and benefit amount for the upcoming certification period, request income information based on the guidelines below:

- Income received during the past 30 days will be used as an indicator of the income that is and will be available to the household during the certification period if this income is expected to continue. However, past income will not be used to determine benefits for the certification period if changes in income have occurred and income from the previous month is not indicative of what the household expects to receive during the certification period.
- If income fluctuates to the extent that a 30-day period alone

cannot provide an accurate indication of anticipated income, use a longer period of income history if it will provide a more accurate indication of anticipated fluctuations in future income.

To ensure households only have two reporting requirements each year, one eligibility report (SAR 7) and one recertification, align the CalFresh recertification with the SAR cycle ([63-272](#)).

Reminder: Issue an approval or denial notice at recertification. Timely (10-day) notice is not required to decrease benefits at recertification.

Refer to [63-304](#).

63-281.6
Resource
Eligibility

Resource eligibility for households **that are not MCE** ([63-120.8](#)) will be evaluated every six months when the household submits the SAR 7 and at recertification. Use the information reported on the SAR 7 and recertification forms to determine continuing eligibility for the certification period or remaining months of the certification period.

CalFresh (SAR) households are not required to report any resource changes mid-period. Do not take action on any voluntary reported changes in property that will result in a decrease of benefits.

The household remains eligible for the entire certification period unless a change is reported on the SAR 7. The case will be discontinued at the end of the SAR Submit Month with timely notice if the household exceeds the resource limit based on property reported on the SAR 7. However, if the household provides verification that their resources are within the resource limit **prior** to the effective date of discontinuance, the discontinuance will be rescinded.

Example 1:	
Scenario	<p>The certification period is January through December. The household submits the May SAR 7 on June 5th. The worker determines that the recipient is property eligible in the SAR Data Month and for the remaining months of the certification period.</p> <p>On July 20th the household receives and reports a one-time cash gift of \$4,100 and deposits it in the household's bank account.</p>
Outcome	<p>This is considered a mid-period voluntary report. The household is not required to report the cash gift and bank account until recertification, which is due in December. The worker will:</p> <ul style="list-style-type: none">• Send a "No Change NOA" informing the household that the voluntary report of the cash gift will not take effect and that the household is responsible for reporting the cash gift on the next SAR 7, and• Enter the information in the "Maintain Held Change Notes" page in CalWIN for future follow up.

	NOTE: At recertification, the worker will evaluate the household's total resources and MCE eligibility. Refer to 63-120.9 , MCE Evaluation.
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Example 2:	
Scenario	<p>The household reports on the February SAR 7 the receipt of a cash gift of \$4,100, which puts the household over the maximum allowable resources limit.</p> <p>The household is not MCE, because one household member is a disqualified drug felon.</p>
Outcome	<p>The worker discontinues benefits at the end of the SAR Submit Month (March) with timely notice.</p> <p>Later in March, the household notifies and provides verification that the balance in the account is below the resource limit.</p> <p>The worker rescinds the discontinuance if all combined property is below the maximum allowable resource limits and if otherwise eligible.</p>
