BenefitsCal | Quick Guide: Periodic Reporting

**Purpose**

The purpose of this BenefitsCal Quick Guide is to provide instructions to assist Customers with completing a periodic report (sometimes referred to as the SAR7 form) for CalFresh, CalWORKs, and Medi-Cal benefits.

The example included within this Quick Guide is for the CalFresh and CalWORKs programs. The example is a simple address change being reported.

**FAQs**

**Q:** How will a Customer know that a Periodic Report (SAR7) form is due?

**A:** Customers will see a periodic report reminder within their dashboard, within the Things to Do section. Customers may also receive a notice that displays within the Message Center.

**Q:** Do Customers have to complete a new Periodic Report if something changes after they complete the report?

**A:** Customers should report a change within 10 days, even if they completed the periodic report.
Periodic Reports

Dashboard
From the Customer Dashboard, select the Submit a Periodic Report tile.

Periodic Report: Getting Started
The system will display a summary of the required periodic report, including the date the report is due, and the programs included.

“Here’s how it works” displays information to help the Customer understand the process by clicking the caret.

Click the caret under Upload documents to display the types of documents that may be necessary to complete the periodic report.

Click the BEGIN button.
**Menu**

The summary displays all the sections to complete, and the status for each section.

Click the **START** button or **BEGIN NEXT SECTION** at the bottom of the screen.

**Current Benefits**

The system displays the benefits the Customer is currently receiving.

Click the **No** button to stop receiving benefits, and a new section will display asking which benefits they would like to stop receiving. Click the checkbox for each program no longer wanted.

Customer will only see screens that require information for the programs they want to renew.

Click the **Yes** button to continue receiving benefits.

Click the **NEXT** button.
Your Information
Customer enters their Home Phone and Mobile Phone numbers.
Click the **NEXT** button.

Your Information: Address
Click the **Yes** button to report a change of address, and additional screens will display to collect the information.
Click the **NEXT** button.
Your Information Summary
A summary of changes made displays.
Click the Edit hyperlink to modify the information.
Click the NEXT button.

Section Divider
Section divider lets the Customer know they have completed section 1 of 8.
Click the START THE NEXT SECTION button.

Repeat the process for all eight (8) sections for possible changes.
Reporting Summary

Once all changes have been completed it’s time to Review and Submit.

Missed changes can now be updated by clicking the UPDATE button next to the section.

Click the START button or the BEGIN NEXT SECTION button at the bottom of the page.

Helpful Nudges

Most Customers have expenses: if the Customer did not enter any expense information, the system will nudge them to confirm.

To make updates, click the No, update my expenses hyperlink, and make the changes.

The same nudge will display for Income (if no income is entered) and Household. This gives the Customer a second chance to report changes.

Click the NEXT button.
**Review and Submit**

Select the **Review my report** hyperlink to review a copy of the period report.

Customers are responsible for reading the “Rights and Responsibilities and Other Important Information.”

The Head of Household enters **First Name, Last Name**, and today’s **Date** (MM/DD/YYYY) in the fields.

Enter the signature of the spouse, domestic partner, or other parent by entering the **First Name, Last Name**, and today’s **Date** (MM/DD/YYYY).

Click the checkbox to electronically sign the periodic report.

Click the **SUBMIT SIGNATURE** button.
**Review and Submit**

Click the **SUBMIT REPORT** button to submit the periodic report.
Review and Submit

A Confirmation Receipt is available including the following:

- Date
- Time
- Case Number
- Program(s)

Click a save receipt method: text, email or printed a copy.

Click the BACK TO HOME button to return to the Customer Dashboard.