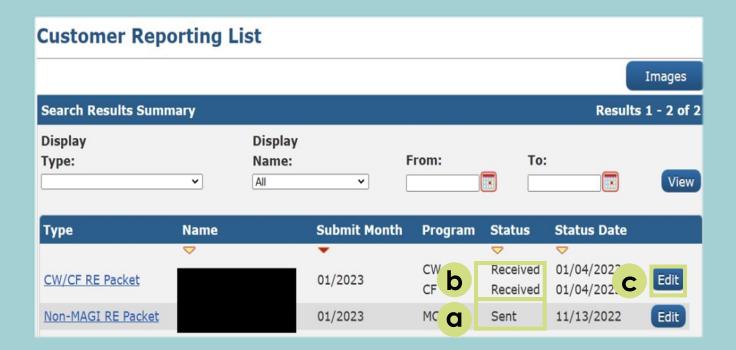# Periodic Reporting and Re-Evaluation
Receive a PR and/or RE

Periodic Reports and/or Re-Evaluation Packets (PR/RE) are sent to the Customer to determine eligibility to continue receiving benefits for certain programs.

The **Customer Reporting List** page is where the Worker will find reports that have been sent to the Customer and the Status of each report.

a. When CalSAWS sends a PR/RE to the Customer, the report status is updated to "Sent" by the system.

b. When the Customer returns the report, the document is imaged. If the system recognizes the barcode, the system updates the status to "Received". A Worker may manually update the barcode and status to "Received" when the document is not recognized by the system.

c. The Worker will review the contents, then click on *Edit* to access the **Customer Reporting Detail** page and update the status.

CalSAWS Terminology

RE (Re-Evaluation) is the term used in CalSAWS equivalent to RRR in CalWIN.
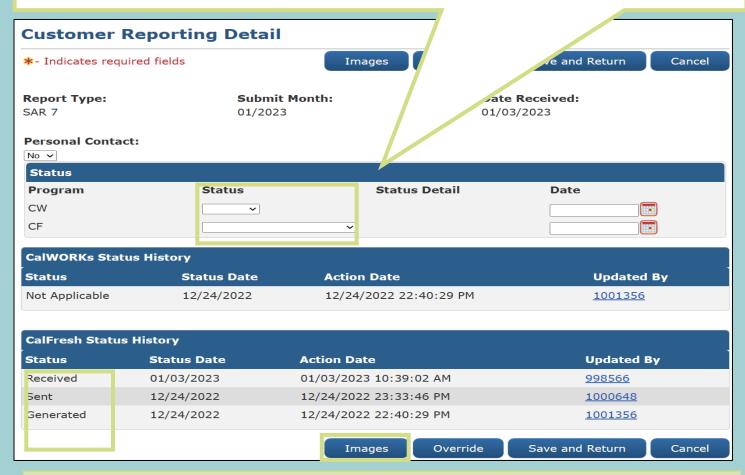
Periodic Reporting and Re-Evaluation
Process a PR and/or RE

The **Customer Reporting Detail** page allows the Worker to update the status of the PR and RE packets by Program.

Status options include:

- **Generated:** The report has been generated by CalSAWS
- **Sent:** CalSAWS has sent the report to the Customer
- **Received:** The report has been received in CalSAWS
- **Not Applicable:** The report is not applicable
- **Error:** The system may set this status, further attention is needed by the worker
- **Incomplete:** The worker will set this status when an incomplete packet is received. This enables the **Status** drop list where the worker can update the Incomplete Reasons. Once saved, a pop-up window displays where the NA 960 Y NOA for CW/CF programs is generated.
- **Reviewed – Ready to Run EDBC:** The worker will set this status when data collection is complete.
- **Complete:** CalSAWS will set the status to "Complete" after EDBC is run. EDBC sets the reporting type and period at this time.
    - **Note:** If the status is not set to "Complete" this may result in a skipped Issuance.

Customer Reporting Detail

* - Indicates required fields   [Images]   [...ve and Return]   [Cancel]

Report Type: **Submit Month:**   **Date Received:**
SAR 7   01/2023   01/03/2023

Personal Contact:
No ▾

Status			
Program	**Status**	**Status Detail**	**Date**
CW	▾		
CF	▾		

CalWORKs Status History			
Status	**Status Date**	**Action Date**	**Updated By**
Not Applicable	12/24/2022	12/24/2022 22:40:29 PM	1001356

CalFresh Status History			
Status	**Status Date**	**Action Date**	**Updated By**
Received	01/03/2023	01/03/2023 10:39:02 AM	998566
Sent	12/24/2022	12/24/2022 23:33:46 PM	1000648
Generated	12/24/2022	12/24/2022 22:40:29 PM	1001356

[Images]   [Override]   [Save and Return]   [Cancel]

The **Images** button navigates the Worker to the submitted report and verifications.

Periodic Reporting
SAR 7 Not Received / Incomplete

When a SAR 7 has not been received by the due date, a 10-day NOA of termination for failure to compete (NA 960 X) is generated by CalSAWS - on the 12th of the month.

If the SAR 7 is incomplete, the worker updates the report status to Incomplete and sends the Y NOA.

If the SAR 7 is returned late, but within one month of the discontinuance date, programs can be rescinded if the SAR 7 or verifications are received per program policy.

CalSAWS runs a batch job on the 2nd day of the month following discontinuance to identify the cases where reports were not received or timely marked incomplete and discontinues the program at the end of the PR Submit Month.

Note: In CalSAWS the Program Block remains open until the discontinuance date based on the program rules.

Re-Evaluation Packet
RE Not Received

CalWORKs and/or CalFresh

If the customer did not attend the **CalFresh** interview, a NOMI is sent by the system.

If the Re-Evaluation packet has not been received, a 10-day NOA (except for CF, NACF, or TCF) is sent to the Customer.

If the Re-Evaluation packet is not received by the last business day of the RE due month, CalSAWS runs a batch job to discontinue the program on the first business day of the following month.

Medi-Cal

If the **Medi-Cal** Re-Evaluation packet is not received, two attempts are made to contact the Customer (two MC reminder NOAs). A 10-Day NOA is then sent to the Customer.

If the **Medi-Cal** Re-Evaluation packet is not received by the 10-day cut off, CalSAWS will automatically discontinue the Medi-Cal program with an effective date of the 1st of the following month. However, if the Re-Evaluation packet is received between 10-day and the effective date of the discontinuance, the **Medi-Cal** program is automatically rescinded.

Medi-Cal programs can be rescinded up to 90 days after a case has been terminated for RE.

Note: In CalSAWS the Program Block remains open until the discontinuance date.