

# **COMPASS**

## **Quick Reference Guide**



### COMPASS Overview

COMPASS is Pennsylvania's fast and easy way to apply online for health and human services. With the click of a button, you can learn about benefits, see if you may qualify, apply for benefits, and re-apply when it is time for renewal.

COMPASS serves as a single access point for the following benefits:

- Health Care Coverage, including CHIP
- Supplemental Nutrition Assistance Program (Food Stamps), including Disaster Food Assistance
- Free or Reduced-Price School Meals
- Cash Assistance
- Child Care Works
- Low-Income Home Energy Assistance Program (LIHEAP)
- Long Term Living Services – Home and Community Based
- Long Term Living Services – Nursing Home and Related Facilities

### COMPASS Homepage

- The message banner at the top of the page provides up-to-date information that may be currently helpful.
- The “Get Started” link offers you 2 options: “See if you Qualify” and “Apply Now.”
- The “Apply Now” link lets you submit an online application for health and human services offered by the Commonwealth of Pennsylvania.
- “See if you Qualify” takes you to a questionnaire that lets you find out which health and human services your household may be eligible to receive.
- The “Renew Now” link allows you to start a Renewal by entering your Renewal Date and selecting the benefits you need to renew.
- The “Use LIHEAP Registration Number” link is a seasonal link that you may use to apply for LIHEAP if you receive a Registration Number.
- The “Programs” dropdown includes links to information for benefits that can be applied for or referrals that can be submitted within COMPASS.
- The “Help Center” dropdown includes information and tutorials on how to use COMPASS, important links within COMPASS, and Frequently Asked Questions (FAQ).
- The “About Us” link provides an overview of what COMPASS can be used for as well as the advantages and features of using COMPASS.
- The “Login” button allows individuals, Community Partners, and Service Providers the opportunity to log in to COMPASS or to register for a COMPASS login. There is also a link here for County Agencies to log in to the Emergency Rental Assistance Program (ERAP).
- The section under “How Can We Help You?” provides links to more information on the programs that we offer.
- COMPASS Quick Actions provides links that will take you directly to the applications for specific programs such as Low-Income Home Energy Assistance Program (LIHEAP), Disaster Food Assistance (D-SNAP), Emergency Rental Assistance Program (ERAP), and Free Summer Meals for Children.
- Referrals to Early Intervention, Intellectual Disability, or Autism Services and links to additional resources can be found towards the bottom of the page.

**Who to call for log in issues:** HELPLINE at 1-800-692-7462 between 8:30 a.m. and 4:30 p.m., Monday through Friday

**This Quick Reference Guide is designed to assist you in the use of COMPASS online services.**

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## About COMPASS

COMPASS is the fast and easy way to apply online for benefits for many health and human services programs anytime and anywhere.

Use COMPASS to:

- Find out if you qualify for services.
- Apply for benefits.
- Renew current benefits.
- Finish a saved application.
- Check an application's status.
- Submit documents electronically for your application or case record.
- Report changes to your case.
- Receive notices for your case.
- Manage your benefits online.

By using COMPASS, you can apply at any time during the day or night from home, a library, or any location with internet access.

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## COMPASS Security

COMPASS is secure, private, and confidential. Information entered in COMPASS is protected through an encryption process.

A username and password ensures confidentiality once the application or renewal is received. Individuals can use their unique username and password to check on the status of their application after it is submitted or to save their application for up to six months to gather additional information.

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## Basic Navigation Tips

Before you get started, here is some useful information that will help you become familiar with the look and feel of COMPASS.

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## Buttons

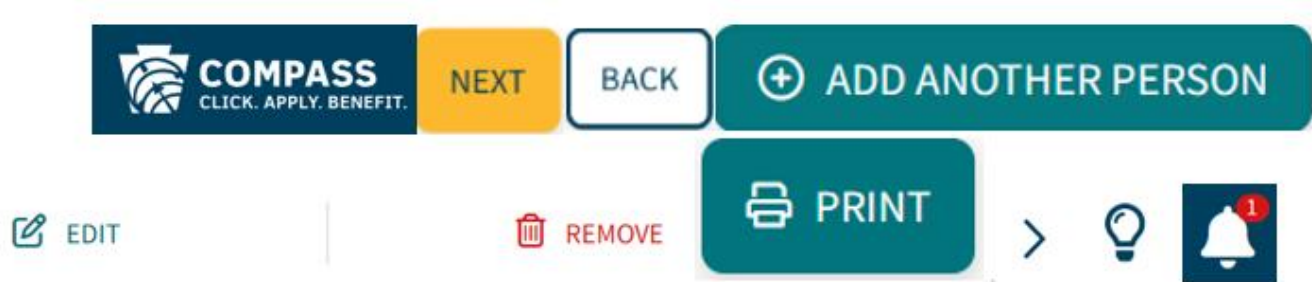
The most frequently used page elements in COMPASS are buttons.

Frequently used BUTTONS include:

- **Next** – Saves information entered on the page. Takes you to the next page.
- **Back** – Saves information entered on the page. Takes you back to the previous page.
- **Add Another**– Adds a section to the page for an additional person, employer, income, expense, insurance policy, or insurance.
- **Remove** – Removes a section from the page.
- **Edit** – Make updates to a section.
- **Reset** – Clears a previously selected Yes/No response.
- **Print** – Creates a printable version of your application.
- **Save & exit** – Saves your unsubmitted application for up to six months. Please note: You have six months to complete and submit your saved application before it is erased unless there is a notice on your Dashboard indicating a different date.
- **Open/Close Icon** – This will let you expand a record to see more information.
- **Light Bulb Icon** – This will appear next to additional helpful information.

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- **Alert Bell Icon** – This will display any alerts you may have received. The number next to the bell indicates how many unread alerts there are.
- **COMPASS Icon** – Returns you to the COMPASS homepage.
- **Logout** – Returns you to the COMPASS homepage after submitting an application or renewal



### Links

Links allow you to move directly to a page within COMPASS. Clicking a link opens the page described by that link. Once a link is clicked, it will change color to indicate that the page has been accessed.

[More about Health Care Coverage](#) 

### Buttons

This allows you to choose one of the given options. Click Reset to select neither Yes, nor No.

A screenshot of a button selection interface. It features a rounded rectangular container with a light gray background. Inside, the text 'Applied for or received benefits in another state' is displayed. Below this text, there are two buttons: 'YES' and 'NO', both with rounded corners and a light blue border. To the right of these buttons, there is a 'Reset' link in blue text.

### Check Boxes

Check boxes allow you to select and deselect multiple options.

A screenshot of a check box selection interface. It features a light gray background with a title 'What is this person's role?' followed by '(required)' in red. Below the title, there is a subtitle 'Select all that apply.' in small gray text. The interface contains seven rows, each with a check box and a label: 'Power of Attorney', 'Caregiver', 'Executor of Living Will', 'Legal Guardian', 'Primary Contact', 'Representative', and 'Support Team Member'. Each row is enclosed in a rounded rectangular box with a light gray border.

### Drop-down Boxes

Drop-down boxes allow you to select only one option from an expandable list.

Drop-down boxes are identified by a down arrow to the right of the box.



What type of other income is this? (required)

Alimony (Spousal Support) ▼

- Select One -


Alimony (Spousal Support)

Annuity


Adjustable Pension

### Date Fields

Date fields allow you to choose a date by manually entering a date in the format of MM/DD/YYYY, or by selecting the date from the calendar on the right of the date field.



What date did Walter start working at this job? (required)

03/22/2023 

If you don't know this date you can estimate. (MM/DD/YYYY)

## Get Started

### See if you Qualify

Click the “Get Started” link on the COMPASS homepage and then click on “See if you Qualify” to fill out a short questionnaire. You will be asked to answer several confidential questions about yourself and the members of your household. Based on your answers, you will be able to view the benefits for which you or a household member may qualify.

By filling out the questionnaire, in a few minutes you will have a better idea of the benefits for which you and members of your household potentially qualify. This will save you time before completing an entire application.

1. **Getting Started** – Explains the process of screening for benefits.
2. **Basic Details** – Enter name and date of birth for all household members.
3. **Program Selection** – Choose the benefits you’d like to be screened for.
4. **Resources** – Answer the questions about household resources.
5. **Household Details** – Answer these questions about individuals in the household.
6. **Your Results** – Review results for the household members you entered, and benefits you selected. Your results will tell you which benefits you may qualify for, and which you might not qualify for.
  - a. **Need more help?** – This section provides links to outside programs that could be beneficial to you based on your results.

### Apply Now

Click the “Apply Now” link on the COMPASS homepage, or under “Get Started”, to start a new application or log in to your My COMPASS Account and begin your application from your online account.

1. **Getting Started**
  - **What to Expect** – Explains what information you will need prior to completing your application.



**IMPORTANT:**

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You may need the following information to complete your application:

- Household income from jobs, child support and other income
- Social Security numbers and birth dates of household members
- Current or recent health insurance information
- Housing and utility expense information
- Resource information, such as bank accounts, vehicles, homes, property, life insurance, etc.  
Please note: Some health and human services, including LIHEAP and Child Care Works, do not need resource information. Also, resources are not needed if you are applying for health care only and you meet one of these exceptions: pregnant; child under age 21; have a dependent child under 21 living with you; you do not have a disability and are under age 65.
- Proof of citizenship and identity if you are a U.S. citizen (for example: birth certificate, driver's license, or state ID)
- Non-citizens must provide documentation showing lawful presence in the U.S unless they are only applying for Medical Assistance for an emergency medical condition.

- a. **Set Up** – Choose whether you are applying for yourself or someone in your household, or a family member or friend outside of your household. Then select whether you have an existing My COMPASS Account.
  - If you already have a My COMPASS Account, click “Yes” and log in using this account.
  - If you do not have a My COMPASS Account or are unable to access your account *for any reason*, select “No”.
    1. Here you are given the option to create a My COMPASS Account now or continue without creating an account.
- b. **Password** – If you choose to create an account, you must enter the head of household's first name, last name, date of birth, and email address. Choose a username and password, and three hint questions and answers.
  - If you have a current Medical Assistance, Cash, SNAP, LIHEAP, or CHIP case, you have the option to link your case to your My COMPASS Account and sign up for online notices. To do this you must provide your Case Record number and SSN or MCI number, or your e-Form Number and Password.
  - After creating a username and password, you will be asked to log in to the account you just created.
- c. **Family Safety** - This page provides information and resources for victims of domestic violence.



### **IMPORTANT:**

- Be sure to write down your username and password and keep them in a safe place.
  - Take note of your hint questions and answers.
  - If your application times out, you will be asked to enter your username and password.
2. **Household** – Enter the head of household information. Click the ADD ANOTHER PERSON button to add each additional household member. Be sure to include members of the household who are currently away from home (for example: students) and tax household members for healthcare. After adding all household members, confirm the head of household and enter your mailing address.
  3. **Benefits** – Select all the benefits for which you or someone in your household is applying. Then select each household member who is applying for each benefit. Benefits include:
    - a. Health Care Coverage, including CHIP
    - b. Supplemental Nutrition Assistance Program (SNAP)
    - c. Free or Reduced-Price School Meals
    - d. Cash Assistance
    - e. Child Care Works
    - f. Low-Income Home Energy Assistance Program (LIHEAP)
    - g. Long Term Living Services – Home and Community Based
    - h. Long Term Living Services – Nursing Home and Related Facilities
  4. **Individual Details** – Answer questions about the household and each individual household member.
  5. **Income** – Answer income questions about the household. Depending on your answer to these questions, you may have to answer income questions about individual household members.

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6. **Expenses** - Answer expense questions about the household. Depending on your answer to these questions, you may have to answer expense questions about individual household members.
7. **Resources** - Provide resource information for all household members such as bank accounts, vehicles, homes, property, and life insurance.
8. **Insurance** - Answer insurance questions about the household. Depending on your answer to these questions, you may have to answer insurance questions about individual household members.
9. **Review** - This process will review the application to determine if there are any remaining questions. Answer all required questions in order to move forward in the application process.
  - a. **Benefits** - Benefits you and/or someone in your household may qualify for based on information given in the application.
  - b. **Summary** - All the sections will be displayed as well as a link to view/print a PDF Summary of the application. Click the EDIT button to make updates to the application.
  - c. **Routing & Provider Information** - Describes which department the application will be routed to and the benefits for which the household has applied.
  - d. **Managed Care Organization** - Provides information about the different Managed Care Organizations (MCOs) that are available for you to choose from. You may select one now, or at a later time.
  - e. **Additional Information** - Provide additional information such as language preference and select whether you would like to receive text message and email notifications. You can also provide comments or additional details here. The answers to these questions will not affect eligibility.
  - f. **Voter Registration** - The Head of Household will have the opportunity to select if they are interested in registering to vote or changing information on their Pennsylvania voter registration.
10. **Submit e-Form**
  - a. **Signature Options** - Choose either "Yes I would like to e-Sign" or "No, I DO NOT want to e-Sign my application". Please note: If you choose to e-Sign your application you agree to provide your signature electronically. If you do not e-Sign your application you will have to print, sign and mail/fax/attach the signature page to the designated office.

**Note:** To e-sign the application, the head of household must be an adult and an SSN must be entered for this individual.
  - b. **Rights and Responsibilities** - After reading and understanding the rights and responsibilities, check the box at the bottom of the page.
  - c. **Identity Verification** - You may be asked to verify your identity by answering questions that pertain to your credit report history. This process allows your application to be processed more quickly and ensures that the information provided in your application remains secure. This section is optional.
  - d. **Certification/Authorization** - After reading and agreeing to e-Sign the application, check the box and enter the last four digits of the adult household member's Social Security number.
  - e. **Submit - Submit** - Choose whether you would like to view and/or print the e-Form for your records, view and/or print the e-Signed page, or have the signature page mailed to the household.

**Note: Once you "Submit" the application, no information can be changed.**
  - f. **Confirmation** - Congratulations, your application has been completed and submitted. Click on the "View Summary" button to review the summary of the application you submitted. Click on the "View Required Documents" button to review verification you may need to submit with your application. If the list is blank, COMPASS does not recognize that you need to provide any verification. Click on the "Attach A File" button to submit your verification documents electronically. Please see the [Attach Documents](#) section for instructions.

**Note:** You may receive eligibility results on the Confirmation page. Review your results; you will receive a notice regarding your eligibility shortly.



### **IMPORTANT:**

- Do not forget to submit the verification documents.
- To review those documents, click the **VIEW REQUIRED ITEMS** button.
- You can submit documents electronically using the **ATTACH A FILE** button on the Confirmation page, or later from your **My COMPASS Account**.

## Disaster Food Assistance (D-SNAP)

The Disaster Supplemental Nutrition Assistance Program (D-SNAP) gives food assistance to low-income households with food loss or damage caused by a natural disaster.



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1. Click “Start a D-SNAP Application Now” under COMPASS Quick Actions to begin an application.
2. Select your county of residence and then select the disaster that has affected your household.  
**Note:** You will only be able to select a disaster if a qualifying natural disaster has occurred within your county of residence.
3. Fill in your household information and answer the questions on the following pages.
4. E-Sign and submit the application.

### Emergency Rental Assistance Program (ERAP)

1. Click “Get Started with ERAP” under COMPASS Quick Actions to access the ERAP portal.
2. Select your county of residence from the drop-down menu.  
**Note:** Some counties do not use COMPASS for their ERAP program. If this is the case, a link will be provided for your county’s ERAP website.
3. If you have received ERAP in the last 12 months in Pennsylvania, click “Start A Recertification”. All other applicants, click “Start an Application”.
4. Enter your household information and answer the required questions to submit your application.

## Returning Users

### My COMPASS Account

To log in to your My COMPASS Account, you must first create a username and password. You can create a My COMPASS Account through the following links:

1. **Apply Now** – When you apply for benefits you will be prompted to enter your My COMPASS Account or create a My COMPASS Account.
2. **Renew your Benefits** – When you renew your benefits, you will be prompted to enter your My COMPASS Account or create a My COMPASS Account.
3. **Login/Register** – To create a My COMPASS Account from the “Login” link, you must currently receive benefits, or you must have an application that was recently submitted on your behalf by a Community Partner or Provider. If your My COMPASS Account is tied to a case, additional features are available such as: viewing case benefit information, reporting changes to your case, populating new applications with case information, and online notices.

**Note:** The following case benefit information cannot be viewed: Free or Reduced-Price School Meals.

### Register as a New User

For instructions on how to create a My COMPASS Account when applying for benefits or renewing your benefits, please see the Password subsection under the [Apply Now](#) and [Renew Your Benefits](#) sections of this guide.

To create a My COMPASS Account from the “Login/Register” link, please do the following:

1. Click the “Login” button in the top right-hand corner of the COMPASS homepage.
2. Click “Create an Account.”
3. Enter the head of household’s personal information. Choose a username and password and select hint questions and answers.  
**Note:** If you would like to receive email communication, including an email containing the User ID you create, enter your email address in the ‘Email Address’ field and the ‘Confirm Email Address’ field.
4. You must link your new account with your case using one of two options:
  - a. Select “Case Record” if you are currently receiving benefits and have a County/Case Record number. You will also need to provide your SSN or MCI#/Medicaid ID/EBT Card number.
  - b. Select “e-Form Number and Password” if you have submitted an application or a Community Partner organization has submitted one for you.
5. Select whether you would like to enroll in online notices. Online notices and communication will be sent to the email

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address provided.

6. Read the "My COMPASS Account" terms and conditions and check the box "I have read, fully understand, and agree to the My COMPASS Account Terms & Conditions."
7. Click on the REGISTER button.
8. Your username has now been created and you may log in to your My COMPASS Account. If a valid email address was provided, you will receive an email with your username.



### **IMPORTANT:**

- **Be sure to write down your username and password and keep them in a safe place.**
- **Also take note of your hint questions and answers.**

## Log in to your My COMPASS Account

Once you have created a username and password you may log in to your My COMPASS Account.

1. Click the "Login" button.
2. Enter your username and password and click "Login".

## My COMPASS Account Features:

1. **Dashboard** – From the Dashboard tab, you can:
  - Receive alerts about COMPASS
  - Apply for benefits
  - Renew your current benefits
  - Complete Semi-Annual Reporting (SAR)
  - Apply for LIHEAP Pre- Season using your Registration Number (if applicable)
  - Import an application that was submitted by a Community Partner or Provider on your behalf
  - Check your EBT Card balance
  - Retrieve your 1095-B Tax Form
  - Finish your saved application/renewal
  - View your submitted application/renewal
  - Check your application status and pending verification
  - Submit documents electronically for your application/renewal
2. **My Benefits** – If you have linked your My COMPASS Account to a case, you will be able to view your household and benefit information. Benefit information includes your benefit amount, your renewal date, and your healthcare benefit package.
  - If you have not linked your My COMPASS Account to a case record or you do not have a case record yet, you have the option of doing so at any time by clicking "Link Your Case", as well as signing up for online notices.
3. **My Notices** – From this tab you can update your Notice Preferences as well as search and view notices from the past 6 months.
  - a. To enroll in online notices, please do the following:
    - i. Add [donotreply@pa.gov](mailto:donotreply@pa.gov) to your email account's contact list.
    - ii. Select 'Yes' to question "Would you like to receive your notices online?"
    - iii. Enter your email address twice.
    - iv. Click SUBMIT
    - v. Log in to your email account. You should have a COMPASS Alert-Confirm Online Notice Enrollment email from [donotreply@pa.gov](mailto:donotreply@pa.gov). If you do not, wait a half hour and check your email again. Be sure to look in your spam folder.
    - vi. Open the confirmation email; click the Confirm your enrollment by "logging in" link.
    - vii. Log in to your My COMPASS Account and click on the Notices tab.
4. **Notification Preferences** – From this tab you can update your language preferences and enroll/disenroll in different kinds of Text Message and Email Notifications.
5. **Report Changes** – If you have linked your My COMPASS Account to a case, you will be able to report changes for your case online and submit documents by using the 'Upload Document' button. The Report Changes homepage provides you with a history of reported changes and uploaded documents. After clicking 'Report a Change' the following categories are presented to select from:
  - Household or Mailing Address
  - Contact Information
  - Job or Income
    - Changes in wages
    - Loss of job

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- Report New Job
- PA Unemployment
- Social Security Changes
- Other Income Changes
- Pregnancy or Other Household Change
- Housing or Utilities
- Resources
- Other Changes

To report a change, do the following:

- a. Click on the applicable categories and enter the information in the fields provided.
  - b. Click on the 'Next' button when you're finished entering your information.
  - c. To submit your change with supporting documentation, click on the 'Attach and Submit' button. To continue without submitting documentation electronically, click on the 'Submit' button.
  - d. You will be asked if you would like to report any more changes. Select Yes or No.
  - e. Once you are finished submitting your change and any scanned or attached documents, you will receive a confirmation screen with your office's information and your reporting/attaching history.
6. **Check EBT-** This link will direct you to [www.connectebt.com](http://www.connectebt.com), where you can check your EBT balance.



### **IMPORTANT:**

- **Certain notices will not be available online and will continue to be mailed your address.**
- **The notices you receive online will be available for three years from the date of receipt.**
- **To switch back to receiving all your notices through mail, click the REMOVE EMAIL button.**

## Renew your Benefits

Click the "Renew your benefits" link on the COMPASS homepage to renew your benefits or log in to your My COMPASS Account and renew your benefits from your online account. You are required to renew your benefits to determine if you are still eligible to receive those benefits. Please note: The following benefits cannot be renewed through COMPASS: Free or Reduced-Price School Meals and LIHEAP.

1. Choose one of the following to renew: "Health Care Coverage, SNAP, Cash Assistance, HCBS Waiver, LTL Services, CHIP" or "Child Care Works Subsidized Child Care Redetermination."
2. Enter your Social Security number, case/county record number and renewal date.



### **IMPORTANT:**

**You may need the following information to complete your renewal:**

- **Household income from jobs, child support and other income**
- **Social Security numbers and birth dates of household members**
- **Current or recent health insurance information**
- **Housing and utility expense information**

**Also, resources are not needed if you are applying for health care only and you meet one of these exceptions: pregnant; child under age 21; have a dependent child under 21 living with you; you do not have a disability and are under age 65.**

**Proof of citizenship and identity if you are a U.S. citizen (for example: birth certificate, driver's license, or state ID)**

- **Non-citizens must provide documentation showing lawful presence in the U.S. unless they are only renewing Medical Assistance for an emergency medical condition.**

### **3. Getting Started**

- a. **Set Up** –Select whether you have an existing My COMPASS Account.
  - If you already have a My COMPASS Account, click 'Yes' and log in now so that your renewal will be tracked and saved in your current My COMPASS Account.
  - If you do not have a My COMPASS Account or are unable to access your account *for any reason*, select "No" to having an account. Selecting "No" will direct you to the create a new account.
- b. **Password** – Enter the head of household's first name, last name, date of birth, and email address. Choose a username and password, and three hint questions and answers.
  - If you have a current Medical Assistance, Cash, SNAP, LIHEAP, or CHIP case, you have the option to link your case to your My COMPASS Account and sign up for online notices.

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### **IMPORTANT:**

- **Be sure to write down your username and password and keep them in a safe place.**
  - **Take note of your hint questions and answers.**
  - **Please note: If your renewal times out, you will be asked to enter your username and password.**
4. **Household** – Review and update all household and mailing address information.
  5. **Benefits** – Select the benefits for which you or someone in your household is renewing. You may choose to apply for additional benefits by selecting them at this time. Then select each household member who is renewing each benefit.
  6. **Individual Details** – Review and update all household and individual household member information.
  7. **Additional Details** – Review and update all additional details questions about the household members.
  8. **Income** – Review and update all income information.
  9. **Expenses** – Review and update all expense information.
  10. **Resources** – Review and update all resource information.
  11. **Insurance** – Review and update all insurance information.
  12. **Summary**
    - a. **Review** - Review the entire renewal. Click the “EDIT” button to make updates to the renewal application.
    - b. **Routing and Provider Information** – Describes which department the renewal has been routed to and the benefits for which the household has applied to renew.
    - c. **Managed Care Organization** – Provides information about the different Managed Care Organizations (MCOs) that are available for you to choose from. You can change your MCO by selecting one now, or at a later time.
    - d. **Additional Information** – Provide additional information such as language preference as well as your contact information in case the caseworker needs more information. Answer additional optional questions. The answers to these questions will not affect eligibility.
    - e. **Voter Registration** - The Head of Household will have the opportunity to select if they are interested in registering to vote or changing information on their Pennsylvania voter registration.
    - f. **Identity Verification** – You may be asked to verify your identity by answering questions that pertain to your credit report history. This process allows the renewal to be processed more quickly and ensures that the information provided remains secure.
  13. **Submit E-form**
    - a. **Signature Options** – If the Social Security Number of the Head of Household was entered, you can e-Sign the renewal.
    - b. **Rights and Responsibilities** – Make sure to read and understand the rights and responsibilities.
    - c. **Certification/Authorization** – If you choose to e-sign the application, enter your initials in the box at the bottom of the page.
    - d. **Submit** – Choose whether you would like to “View and/or print the e-Form for your records”, “View and/or print the e-Signed signature page” or “Do not have a printer” at this time.
    - e. **Confirmation** – Congratulations, your renewal has been completed and submitted. Click on the “View Summary” button to review the summary of the renewal. Click on the “View Required Items” button to review verification you may need to submit. If the list is blank, COMPASS does not recognize that any verification is needed. Click on the “Attach A File” button to submit the verification documents electronically. Please see the [Attach Documents](#) section for instructions.

**Note:** You may receive eligibility results on the Confirmation page. Review your results; you will receive a notice regarding your eligibility shortly.



### **IMPORTANT:**

- **Do not forget to submit the verification documents.**
- **To review those documents, click the VIEW REQUIRED ITEMS button.**
- **You can submit documents electronically using the ATTACH A FILE button on the Confirmation page or later from your My COMPASS Account.**

## Semi-Annual Reporting (SAR)

Most SNAP and Cash Assistance cases, and some Health Care cases are enrolled in Semi-Annual Reporting (SAR).

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You will receive an alert in COMPASS when SAR is due for your case.

1. Click on the Semi-Annual Reporting (SAR) button under Quick Actions to begin the SAR workflow and click Get Started.
2. Confirm the case details for the benefit(s) you're completing the SAR for and click Next.
3. Review and complete each of the following sections. Remember to update any details that may have changed.
  - a. Current Address
  - b. Household Members
  - c. Jobs
  - d. Other Income
  - e. Child Support
  - f. Child/Dependent Care
  - g. Resources
4. Review the Summary of your changes and click Next.
5. If you are submitting the SAR past its due date, you will be asked to provide a reason for why it is late. Complete this screen and click Next.
6. Voter Registration - The Head of Household will have the opportunity to select if they are interested in registering to vote or changing information on their Pennsylvania voter registration.
7. Select whether you are the Head of Household on your case or acting as an Authorized Representative for the household.
8. You can provide an email address to receive a receipt showing that the SAR was completed.
9. Click Submit.

### Finish your Application

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Log in to your My COMPASS Account to continue a saved application/renewal.

**Note:** If you did not create or use a username to begin your application, or your application was started by a Community Partner / Provider on your behalf, click the "Finish Application" button under Important Links at the bottom of the COMPASS homepage. Click the "Create an Account" link to create a My COMPASS Account with your e-Form number and password. If you would like to continue without creating a My COMPASS Account, enter your e-Form number and password, and click the SIGN IN button.

1. Select the 'Saved' tab under 'My Applications'. You can choose whether you'd like to delete the application, view a summary, or continue the application.
2. After clicking 'Continue', you can select whether you'd like to start at the beginning of the application, at the section where you left off, or at another specific section of your choice.

**Note:** You have up to six months to complete and submit your saved application before it is erased, unless there is a notice on your My COMPASS Account indicating a different date.

### Check Application Status

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1. Under 'My Applications', click on the 'Submitted' tab. Select the application you would like to check the status of.
2. Click on "View Status" to check the application's status. Here you can view the e-Form, upload documents, or view verification documents.

**Note:** If you did not create or use a My COMPASS Account (username) to submit your application, or your application was submitted by a Community Partner / Provider on your behalf, click the "Check Application Status" link under the "Important Links" section at the bottom of the COMPASS homepage and click the "Create an Account" link to create a My COMPASS Account with your e-Form number and password. If you would like to continue without creating a My COMPASS Account, enter your e-Form number and password, and click the CHECK STATUS button.

### Chatbot



The robot icon in the bottom right corner of the screen is the COMPASS Chatbot, Ben. Ben can answer general questions about the COMPASS website as well as questions specific to your benefits if you are logged into your My COMPASS Account.

1. Click on the icon to begin a chat session.
2. Type your question in the box and click the send arrow or select a topic from the menu.

**Note:** Chatbot works best if you ask simple, direct questions one at a time.

### Qualtrics Surveys

You will be presented with a brief survey after submitting your application OR if you leave the COMPASS website before completing an application. These surveys help us gain valuable information about the COMPASS user experience.

1. Use the arrows to navigate between each question.
2. You will have the option to answer or skip a question.
3. You will be given the option to provide an email address to participate in a follow-up survey within a few days.

## COMPASS Attach Documents

COMPASS users have the option to attach and submit verification documents both during the initial application submission, and as needed for an ongoing case.

### Submitting Verification Documents for your Application

From the Dashboard tab in your My COMPASS Account, select the 'Submitted' tab, find your application, and click 'Attach'. You can also access this by clicking 'Upload Documents' on the application status page.

To Upload Documents:

1. Select the 'ATTACH' button.
2. Make sure the e-form # is correct.
3. Select the type of document from the list and click Next.
4. Click 'Choose A File' and select the file you wish to upload.
5. Click Next to upload the file.

### Submitting Verification Documents for your Case Record

From the Dashboard tab in your My COMPASS Account or from the 'Report Changes' tab, click 'Upload Document' to submit documents as needed for your ongoing case.

To Upload Documents:

1. Select the 'Upload Documents' button.
2. Select the category and then the sub-category that the document falls under.
3. Click 'Choose A File' and select the document you'd like to upload.
4. Click Next to upload the document(s).

## Frequently Asked Questions

**Q: How long will it take me to apply for benefits using COMPASS?**

**A:** It will take at least 25 minutes to complete an application. The exact length will depend on the benefits selected and the number of people in the household.

**Q: Which benefits may I apply for using COMPASS?**

**A:** The following benefits may be applied for using COMPASS: Health Care Coverage (including CHIP), Supplemental Nutrition Assistance Program (SNAP), Free or Reduced-Price School Meals, Cash Assistance, Child Care Works, Low-Income Home Energy Assistance Program (LIHEAP), Disaster Food Assistance (D-SNAP), Emergency Rental Assistance Program (ERAP), Long Term Living Services– Home and Community Based and Long-Term Living Services – Nursing Home and Related Facilities.

**Q: Why is the information I entered during “See If You Qualify” not carried over to my application?**

**A:** The information you entered during “See If You Qualify” is not carried over to your application because the questionnaire asks for general information to keep the “See If You Qualify” process short and simple. Therefore, the information is not specific enough for your application.

**Q: Once I submit my application and receive the confirmation page do I need to take any additional steps?**

**A:** Yes, you must submit any requested verification documents for the application to be processed.

**Q: What can I use My COMPASS Account for?**

**A:** The “My COMPASS Account” serves as a centralized location for your application and case information. It lets you see if you or your household members qualify for benefits, apply for and renew your benefits, save and submit applications, check the status of your application, submit documents electronically, view you or your household members’ case benefit information, report changes to your case, receive notices electronically, and manage other aspects of your case online.

**Q: Will all notices be sent to me electronically when I enroll in online notices?**

**A:** No, certain notices will continue to be mailed to your household. Each time a notice is sent to you electronically, you will receive an email alert notifying you that you have a notice waiting for you in your My COMPASS Account.

**Q: Can I renew my benefits online even if I initially did not use COMPASS to apply for services?**

**A:** Yes, you may renew your benefits online regardless of whether you initially used COMPASS to apply for services. Please note: The following benefits cannot be renewed through COMPASS: Free or Reduced-Price School Meals and LIHEAP.