

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237007 DDIDs 2319 2686 FDS - GA GR -
Group 6 Forms

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Stephanie Hugo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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01/13/2022	2.0	<ul style="list-style-type: none"> Updated Incomplete Reasons to use existing CalSAWS reasons Added Technical Notes of Correspondence Neagative Actions Added Recommendations 2.5,2.6,2.7 Moved SAR 7 (12/14) related functionality to 22.05 Removed Tier 3 correspondences and Y-NOAs without Incomplete Correspondences 	Harish Katragadda
01/20/2022	3.0	<ul style="list-style-type: none"> Removed Incomplete Reason Document Triggers in 2.3 for Counties not using the QR 7 Periodic Reporting Form (Placer, Santa Barbara,Yolo,Santa Cruz, Santa Clara, San Francisco, San Luis Obispo) Added Technical Details for Batch Jobs in Recommendations 2.1, 2.2, 2.4 	Harish Katragadda
01/22/2022	4.0	<ul style="list-style-type: none"> Added CW7-GR, QR7 (12/08) Customer Reporting Types to Customer Reporting detail Page 	Harish Katragadda
02/01/2022	5.0	<ul style="list-style-type: none"> Removed San Diego County Related Triggers and Correspondences for Peridic Reporting, county No longer require Periodic Reporting from 2.3.2, 2.3.3 Removed Alameda and 	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		<p>Tulare PR Correspondences 2.3.2</p> <ul style="list-style-type: none"> • Removed following Correspondences as Triggers are not applicable from 2.3.2 <ul style="list-style-type: none"> - Orange-GN0023, GN0024, GN0034 - Placer-GN0021 - Santa Barbara-GN0026 	

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1 OVERVIEW

This SCR will implement the Sixth group of Non-EDBC triggers for GA/GR Automated EDBC/CC Counties Solution.

1.1 Current Design

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program.

1.2 Requests

A new GA/GR Automated solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will add additional Non-EDBC correspondence triggers through either online or batch.

1.3 Overview of Recommendations

1. Add GA/GR Periodic Report Not Received (X-NOA) Discontinuance Notice Triggers for GA/GR Automated EDBC/CC Counties solution.
2. Add Balderas Notice Trigger for GA/GR Automated EDBC/CC Counties solution for Not Received Periodic Reporting Form.
3. Add GA/GR Periodic Report Incomplete (Y-NOA) Discontinuance Notice Triggers for GA/GR Automated EDBC/CC Counties solution.
4. Add Balderas Notice Trigger for GA/GR Automated EDBC/CC Counties solution for Incomplete Periodic Reporting Form.
5. Update Customer Reporting Detail Page
6. Update Data Group Indicators.
7. Add Notification to Facility Operator form.

1.4 Assumptions

1. All the changes in this SCR will not affect the Los Angeles GA, GA (Managed) and GA (Non-Managed) programs.
2. This SCR will only implement triggers based on the existing CalWIN GA/GR Correspondences. Verbiage and format are not covered in this SCR.
3. All triggers are based on current existing triggers in CalWIN.
4. The triggers will only be available to cases from counties that are mentioned in the recommendation's respective "Correspondence Information" section.
5. The functionality of this SCR will be disabled until activated by the system property flag established in SCR CA-215669.
6. Miscellaneous Parameter implementation and functionality is covered in SCR CA-215920 covering the technical details of the GA/GR Correspondence Functionality on the CalSAWS side.

7. This SCR follows the general Online Non-EDBC Correspondence Generation recommendation (rec. 2.1) from SCR CA-215670.
8. New buttons added through this SCR will only be visible to cases with a GA/GR Automated EDBC/CC Program. Additional visibility conditions will be specified in the recommendations as necessary.
9. The consolidation logic implemented in SCR CA-215920 applies to all correspondences on this SCR.
10. County Sanction Process for Periodic Reporting will not have County Admin Capability
11. SAR 7 (12/14) related functionality for Alameda and Tulare will be implemented in 22.05 with SCR CA-233752
12. Process of handling after receiving the Incomplete Periodic Reporting correspondence will be handled as per the County Business Process and is not automated.

2 RECOMMENDATIONS

2.1 Add GA/GR Periodic Report Not Received (X-NOA) Discontinuance Notice Triggers

2.1.1 Overview

Trigger GA/GR Periodic Report Not Received (X-NOA) Discontinuance Notice in batch for a case when an Individual fails to return the Customer Reporting Correspondence for the reporting period.

2.1.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
GN0013	Fresno	NOA	Discontinuance	General Assistance Discontinuance - Nonreceipt of QR7	X	11541
GN0013	Orange	NOA	Discontinuance	GR Disc - No QR7	F063-26-14X	609347
GN0013	Placer	NOA	Discontinuance	No Income Report Received	X-1	608991
GN0013	Sacramento	NOA	Discontinuance	GA DIS - NO QUARTERLY STATUS REPORT	NA 960 X (4/04)	608453

GN0013	Santa Barbara	NOA	Discontinuance	GR Disc - Monthly Report Not Received	X-3	11992
GN0013	Santa Clara	NOA	Discontinuance	GA Discontinuance - No income report received	GA X	12061
GN0013	Santa Cruz	NOA	Discontinuance	Discontinuance - Completed Income Report Not Provided for GA	X-2	12081
GN0013	San Diego	NOA	Discontinuance	GR Discontinuance - Failure to Provide Periodic Report	X-2	12735
GN0013	San Francisco	NOA	Discontinuance	CAAP X - Discontinuance: CAAP 1 Monthly Report Not Returned	X 3	607426
GN0013	San Luis Obispo	NOA	Discontinuance	GA Discontinuance - Failure to Return Monthly Eligibility Report	GA - X	12736
GN0013	San Mateo	NOA	Discontinuance	GA Discontinuance - Failure to provide complete QR 7	X 3	11960
GN0013	Solano	NOA	Discontinuance	GA - Discontinuance Income Report Related	W	607533
GN0013	Yolo	NOA	Discontinuance	GA Discontinuance - Failure to Provide an Income Report	X 3	12408

2.1.3 Description of Change

1. Create New Batch Jobs for the Counties to trigger GA/GR Periodic Report Not Received (X-NOA) Discontinuance Notice for cases with following conditions on 12th Calendar day of the Month :
 - a. Periodic Reporting Correspondence that was sent has not been returned for the reporting month.
 - b. GA/GR Automated EDBC/CC Counties solution program status is active currently
 - c. A Negative action of 'Not Received' is active for the Periodic Reporting Form.
 - d. County Doesn't Particiate in County Sanctions for Periodic Reporting

2. Add County Sanction Process Indicator for GA/GR Automated EDBC/CC Counties solution for Not Received Completed Periodic Reporting Sanction.
 - a. Create a new Category for the Periodic reporting sanction category with the below values.

County	Not Received Completed Periodic Reporting Sanction
Alameda	N
Contra Costa	Y
Fresno	N
Orange	N
Placer	N
Sacramento	N
San Diego	N
San Francisco	N
San Luis Obispo	N
San Mateo	N
Santa Barbara	N
Santa Clara	N
Santa Cruz	N
Solano	N
Sonoma	N
Tulare	N
Ventura	N
Yolo	N

Customer Reporting Negative Action Correspondences:

County	Document not returned		Resulting Triggered Document	
	Document Number	Document Name	Negative Action NOA Number	Negative Action NOA Name
Fresno	QR 7 (12/08)	Quarterly Eligibility/Status Report	X	General Assistance Discontinuance - Nonreceipt of QR7
Orange	QR 7 (12/08)	Quarterly Eligibility/Status Report	F063-26-14X	GR Disc - No QR7
Placer	CW 7	Monthly Eligibility Report	X-1	No Income Report Received
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	NA 960 X (4/04)	GA DIS - NO QUARTERLY STATUS REPORT
San Diego	CW 7	Monthly Eligibility Report	X-2	GR Discontinuance - Failure to Provide Periodic Report

	Document not returned		Resulting Triggered Document	
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	X-2	GR Discontinuance - Failure to Provide Periodic Report
San Francisco	CAAP 1	CAAP Monthly Earned Income & Asset Report	X 3	CAAP X - Discontinuance: CAAP 1 Monthly Report Not Returned
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	GA - X	GA Discontinuance - Failure to Return Monthly Eligibility Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	X 3	GA Discontinuance - Failure to provide complete QR 7
Santa Barbara	CW 7-GR	Monthly Eligibility Report	X-3	GR Disc - Monthly Report Not Received
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	GA X	GA Discontinuance - No income report received
Santa Cruz	CW 7	Monthly Eligibility Report	X-2	Discontinuance - Completed Income Report Not Provided for GA
Solano	48-70-20 (REV 3/12)	GA Income/Job Search Report	W	GA - Discontinuance Income Report Related
Yolo	YC58	GA Monthly Eligibility Report	X 3	GA Discontinuance - Failure to Provide an Income Report

Technical Note: Create Code Detl Category for the Customer Reporting Negative Action Correspondence records in Recommendation 2.1, 2.2 ,2.3, 2.4

- For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a GA/GR Periodic Report Not Received (X-NOA) Discontinuance Notice form during batch forms processing.

Transaction values:

- Case ID: Case associated to GA/GR Automated EDBC/CC Counties Program
- Program ID: Program ID
- Person ID: Primary Applicant of Active GA/GR Automated EDBC/CC Counties Program
- Type Code: FR
- Sub Type Code: TBD by build
- Eff Date: Batch Date
- Created By: Batch
- Updated By: Batch

2.1.4 Execution Frequency

Schedule batch jobs to run monthly on the 12th Calendar day.

2.1.5 Key Scheduling Dependencies

This job will run before forms balancers.

2.1.6 Counties Impacted

This job will run for counties in the Requirement

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.1.9 Miscellaneous Parameters

N/A

2.2 Add Balderas Notice Trigger for Not Received Customer Reporting

2.2.1 Overview

Triggered in batch for a case when a client fails to return an income report for the reporting period Correspondence Information

2.2.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
GN0029	Santa Clara	Form	N/A	GA/GR Five Days to Determine Good reason-Incomplete SAR 7	spltr 931	325113

2.2.3 Description of Change

Create New Batch Job for the Santa Clara County to trigger the Correspondence for cases with following conditions on the 6th day from the end of the month:

1. Periodic Reporting Correspondence that was sent has not been returned for the report month.
2. GA/GR Automated EDBC/CC Counties solution program status is active currently.
3. A Negative action is to send Balderas Notice.

Customer Reporting Negative Action Correspondences:

		Document not returned	Resulting Triggered Document	
County	Form Number	Form Name	Negative Action OCC Number	Negative Action OCC Name
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	spltr 931	GA/GR Five Days to Determine Good reason-Incomplete SAR 7

Technical Note: Create Code Detl Category for the Customer Reporting Negative Action Correspondence records in Recommendation 2.1, 2.2 ,2.3, 2.4

4. For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a Balderas Notice Trigger for Not Received Customer Reporting form during batch forms processing.

Transaction values:

- i. Case ID: Case associated to GA/GR Automated EDBC/CC Counties Program
- j. Program ID: Program ID
- k. Person ID: Primary Applicant of Active GA/GR Automated EDBC/CC Counties Program
- l. Type Code: FR
- m. Sub Type Code: TBD by build
- n. Eff Date: Batch Date
- o. Created By: Batch
- p. Updated By: Batch

2.2.4 Execution Frequency

Schedule batch job to run monthly on the 6th day from the end of the month.

2.2.5 Key Scheduling Dependencies

This job will run before forms balancers.

2.2.6 Counties Impacted

This job will run for counties in the Requirement

2.2.7 Data Volume/Performance

N/A

2.2.8 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.2.9 Miscellaneous Parameters

N/A

2.3 Add GA/GR Periodic Report Incomplete (Y-NOA) Discontinuance Notice Triggers

2.3.1 Overview

GA/GR Periodic Report Incomplete (Y-NOA) Discontinuance Notices are triggered when a required Customer Reporting Correspondence is returned incomplete.

2.3.2 Correspondence Information

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0005	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	607320

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0005	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0005	San Luis Obispo	NOA	Discontinuance	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report	12737
GN0005	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0006	Fresno	NOA	Discontinuance	Y	General Relief Discontinuance - Incorrect/Incomplete QR7	12620
GN0006	Orange	NOA	Discontinuance	F063-26-14Y	GR Discontinuance - Incomplete QR7	609349
GN0006	Placer	NOA	Discontinuance	Y-2	Incomplete Income Report	608579
GN0006	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	607321
GN0006	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0006	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0006	Santa Cruz	NOA	Discontinuance	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification	12093
GN0006	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0006	San Francisco	NOA	Discontinuance	Y 3	CAAP Discontinuance: CAAP-1 Incomplete	12636
GN0006	San Luis Obispo	NOA	Discontinuance	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report	12737
GN0006	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0006	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0007	Fresno	NOA	Discontinuance	Y	General Relief Discontinuance - Incorrect/Incomplete QR7	12620
GN0007	Orange	NOA	Discontinuance	F063-26-14Y	GR Discontinuance - Incomplete QR7	609349
GN0007	Placer	NOA	Discontinuance	Y-2	Incomplete Income Report	608579

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0007	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	607322
GN0007	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0007	Sanat Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0007	Santa Cruz	NOA	Discontinuance	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification	12093
GN0007	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0007	San Francisco	NOA	Discontinuance	Y 3	CAAP Discontinuance: CAAP-1 Incomplete	12636
GN0007	San Luis Obispo	NOA	Discontinuance	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report	12737
GN0007	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0007	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0008	Fresno	NOA	Discontinuance	Y	General Relief Discontinuance - Incorrect/Incomplete QR7	12620
GN0008	Orange	NOA	Discontinuance	F063-26-14Y	GR Discontinuance - Incomplete QR7	609349
GN0008	Placer	NOA	Discontinuance	Y-2	Incomplete Income Report	608579
GN0008	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	607323
GN0008	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0008	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0008	Santa Cruz	NOA	Discontinuance	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification	12093
GN0008	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0008	San Francisco	NOA	Discontinuance	Y 3	CAAP Discontinuance: CAAP-1 Incomplete	12636

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0008	San Luis Obispo	NOA	Discontinuance	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report	12737
GN0008	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0008	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0009	Fresno	NOA	Discontinuance	Y	General Relief Discontinuance - Incorrect/Incomplete QR7	12620
GN0009	Placer	NOA	Discontinuance	Y-2	Incomplete Income Report	608579
GN0009	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608087
GN0009	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0009	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0009	Santa Cruz	NOA	Discontinuance	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification	12093
GN0009	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0009	San Luis Obispo	NOA	Discontinuance	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report	12737
GN0009	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0009	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0010	Fresno	NOA	Discontinuance	Y	General Relief Discontinuance - Incorrect/Incomplete QR7	12620
GN0010	Placer	NOA	Discontinuance	Y-2	Incomplete Income Report	608579
GN0010	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	607325
GN0010	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0010	Santa Cruz	NOA	Discontinuance	Y-2	Discontinuance - GA Disc For Failure to	12093

Reason Code	County	Category	NOA Action	Number	Document Name	Template
					Provide Information or Verification	
GN0010	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0010	San Luis Obispo	NOA	Discontinuance	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report	12737
GN0010	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0010	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0011	Fresno	NOA	Discontinuance	Y	General Relief Discontinuance - Incorrect/Incomplete QR7	12620
GN0011	Orange	NOA	Discontinuance	F063-26-14Y	GR Discontinuance - Incomplete QR7	609349
GN0011	Placer	NOA	Discontinuance	Y-2	Incomplete Income Report	608579
GN0011	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	607326
GN0011	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0011	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0011	Santa Cruz	NOA	Discontinuance	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification	12093
GN0011	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0011	San Francisco	NOA	Discontinuance	Y 3	CAAP Discontinuance: CAAP-1 Incomplete	12636
GN0011	San Luis Obispo	NOA	Discontinuance	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report	12737
GN0011	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0011	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0012	Fresno	NOA	Discontinuance	Y	General Relief Discontinuance - Incorrect/Incomplete QR7	12620

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0012	Placer	NOA	Discontinuance	Y-2	Incomplete Income Report	608579
GN0012	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	607327
GN0012	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0012	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0012	Santa Cruz	NOA	Discontinuance	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification	12093
GN0012	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0012	San Luis Obispo	NOA	Discontinuance	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report	12737
GN0012	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0012	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0014	Fresno	NOA	Discontinuance	Y	General Relief Discontinuance - Incorrect/Incomplete QR7	12620
GN0014	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608087
GN0014	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0014	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0014	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0014	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0016	Solano	NOA	Discontinuance	W	GA - Discontinuance Income Report Related	607533
GN0017	Solano	NOA	Discontinuance	W	GA - Discontinuance Income Report Related	607533
GN0018	Solano	NOA	Discontinuance	W	GA - Discontinuance Income Report Related	607533

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0019	Solano	NOA	Discontinuance	W	GA - Discontinuance Income Report Related	607533
GN0020	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608087
GN0020	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0020	San Diego	NOA	Discontinuance	Y-2	GR Discontinuance - Incomplete Periodic Report	12732
GN0020	San Francisco	NOA	Discontinuance	Y 3	CAAP Discontinuance: CAAP-1 Incomplete	12636
GN0020	San Mateo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide Complete QR 7	11973
GN0020	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0020	Yolo	NOA	Discontinuance	Y 3	GA Discontinuance - Failure to Provide A Complete Report	12405
GN0021	Placer	NOA	Discontinuance	Y-2	Incomplete Income Report	608579
GN0021	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608089
GN0021	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0021	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0021	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0023	Orange	NOA	Discontinuance	F063-26-14Y	GR Discontinuance - Incomplete QR7	609349
GN0023	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0024	Orange	NOA	Discontinuance	F063-26-14Y	GR Discontinuance - Incomplete QR7	609349
GN0024	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608087
GN0024	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0024	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0024	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0025	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0026	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608087
GN0026	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0026	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0026	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0027	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0027	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0028	Orange	NOA	Discontinuance	F063-26-14Y	GR Discontinuance - Incomplete QR7	609349
GN0028	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608087
GN0028	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0028	Santa Clara	NOA	Discontinuance	GA Y	GA Discontinuance - Incomplete Income Report	12523
GN0028	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0031	San Francisco	NOA	Discontinuance	Y 3	CAAP Discontinuance: CAAP-1 Incomplete	12636
GN0032	Santa Barbara	NOA	Discontinuance	Y-2	GR Disc - Monthly Report Incomplete	12681
GN0032	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0033	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0034	Orange	NOA	Discontinuance	F063-26-14Y	GR Discontinuance - Incomplete QR7	609349
GN0036	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608087
GN0037	Sacramento	NOA	Discontinuance	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder	608087
GN0040	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0042	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0043	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0044	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0045	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0047	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0051	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0052	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0055	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0056	Contra Costa	NOA	Discontinuance	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)	609252
GN0057	Alameda	NOA	Discontinuance	GA Y (06/14)	GA Disc - Reminder SAR7 Incomplete	609594
GN0057	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0058	Alameda	NOA	Discontinuance	GA Y (06/14)	GA Disc - Reminder SAR7 Incomplete	609594
GN0058	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0059	Alameda	NOA	Discontinuance	GA Y (06/14)	GA Disc - Reminder SAR7 Incomplete	609594
GN0059	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0060	Alameda	NOA	Discontinuance	GA Y (06/14)	GA Disc - Reminder SAR7 Incomplete	609594

Reason Code	County	Category	NOA Action	Number	Document Name	Template
GN0060	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0061	Alameda	NOA	Discontinuance	GA Y (06/14)	GA Disc - Reminder SAR7 Incomplete	609594
GN0061	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0062	Alameda	NOA	Discontinuance	GA Y (06/14)	GA Disc - Reminder SAR7 Incomplete	609594
GN0062	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0063	Alameda	NOA	Discontinuance	GA Y (06/14)	GA Disc - Reminder SAR7 Incomplete	609594
GN0063	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0064	Alameda	NOA	Discontinuance	GA Y (06/14)	GA Disc - Reminder SAR7 Incomplete	609594
GN0064	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340
GN0066	Tulare	NOA	Discontinuance	Y-3	GA Disc - Incomplete Eligibility and Income Report	12340

2.3.3 Description of Changes

1. Trigger the correspondence for all opted-in counties through Customer Reporting Detail page and the following conditions are met:
 - a. Customer Reporting correspondence for GA/GR Automated EDBC/CC Counties solution program has been received back from the client.
 - b. Customer Reporting record is marked as 'Incomplete' and a Incomplete Reason is Selected.
 - c. County doesn't use the Sanction Process for periodic reports
 - d. Periodic report has been designated by the county as requiring a negative action.
 - e. GA/GR Automated EDBC/CC Counties solution program is active or discontinued.
 - f. A GA/GR Periodic Report Not Received (X-NOA) Discontinuance Notice has not already sent out for the Periodic Reporting correspondence.

- g. A GA/GR Periodic Report Incomplete (Y-NOA) Discontinuance Notice has not already sent out for the Periodic Reporting correspondence.
 - h. Customer Reporting correspondence is mapped in the County Parameter with the action indicator "Incomplete" negative action switch is Yes and with the incomplete reason the user selected.
2. Add periodic reporting indicators for requiring negative action for the Periodic Reporting forms in a new code category table from the values in Periodic Reporting Negative Action Required.xlsx(Supporting Document 1)

Customer Reporting Negative Action Correspondences:

Returned Periodic report			Resulting Document to Trigger			
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
Placer	CW 7	Monthly Eligibility Report	No signature	GN0006	Y-2	Incomplete Income Report
Placer	CW 7	Monthly Eligibility Report	Did not date	GN0007	Y-2	Incomplete Income Report
Placer	CW 7	Monthly Eligibility Report	Dated before first of the month	GN0008	Y-2	Incomplete Income Report
Placer	CW 7	Monthly Eligibility Report	Information not provided for Y-N answer	GN0009	Y-2	Incomplete Income Report
Placer	CW 7	Monthly Eligibility Report	You failed to answer all the questions on the CW 7	GN0010	Y-2	Incomplete Income Report
Placer	CW 7	Monthly Eligibility Report	Need proof of information reported	GN0011	Y-2	Incomplete Income Report
Placer	CW 7	Monthly Eligibility Report	One or Two Required Signature Missing	GN0012	Y-2	Incomplete Income Report
San Francisco	CAAP 1	CAAP Monthly Earned Income & Asset Report	No signature	GN0006	Y 3	CAAP Discontinuance: CAAP-1 Incomplete
San Francisco	CAAP 1	CAAP Monthly Earned Income & Asset Report	Did not date	GN0007	Y 3	CAAP Discontinuance: CAAP-1 Incomplete

Returned Periodic report				Resulting Document to Trigger		
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
San Francisco	CAAP 1	CAAP Monthly Earned Income & Asset Report	Dated before first of the month	GN0008	Y 3	CAAP Discontinuance: CAAP-1 Incomplete
San Francisco	CAAP 1	CAAP Monthly Earned Income & Asset Report	Need proof of information reported	GN0011	Y 3	CAAP Discontinuance: CAAP-1 Incomplete
San Francisco	CAAP 1	CAAP Monthly Earned Income & Asset Report	No Verification of Assets	GN0020	Y 3	CAAP Discontinuance: CAAP-1 Incomplete
San Francisco	CAAP 1	CAAP Monthly Earned Income & Asset Report	Self Employment Information Missing	GN0031	Y 3	CAAP Discontinuance: CAAP-1 Incomplete
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	No signature	GN0006	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	Did not date	GN0007	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	Dated before first of the month	GN0008	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	Information not provided for Y-N answer	GN0009	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	You failed to answer all the questions on the CW 7	GN0010	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	Need proof of information reported	GN0011	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	One or Two Required Signature Missing	GN0012	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report
San Luis Obispo	DSS GA 213	Eligibility Report - General Assistance	Information provided earlier not reported	GN0005	GA - Y	GA Discontinuance - Failure to Complete Monthly Eligibility Report
Yolo	YC58	GA Monthly Eligibility Report	No signature	GN0006	Y 3	GA Discontinuance - Failure to Provide A Complete Report

Returned Periodic report				Resulting Document to Trigger		
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
Yolo	YC58	GA Monthly Eligibility Report	Did not date	GN0007	Y 3	GA Discontinuance - Failure to Provide A Complete Report
Yolo	YC58	GA Monthly Eligibility Report	Dated before first of the month	GN0008	Y 3	GA Discontinuance - Failure to Provide A Complete Report
Yolo	YC58	GA Monthly Eligibility Report	Information not provided for Y-N answer	GN0009	Y 3	GA Discontinuance - Failure to Provide A Complete Report
Yolo	YC58	GA Monthly Eligibility Report	You failed to answer all the questions on the CW 7	GN0010	Y 3	GA Discontinuance - Failure to Provide A Complete Report
Yolo	YC58	GA Monthly Eligibility Report	Need proof of information reported	GN0011	Y 3	GA Discontinuance - Failure to Provide A Complete Report
Yolo	YC58	GA Monthly Eligibility Report	One or Two Required Signature Missing	GN0012	Y 3	GA Discontinuance - Failure to Provide A Complete Report
Yolo	YC58	GA Monthly Eligibility Report	All Income Not Reported	GN0005	Y 3	GA Discontinuance - Failure to Provide A Complete Report
Yolo	YC58	GA Monthly Eligibility Report	No Verification of Assets	GN0020	Y 3	GA Discontinuance - Failure to Provide A Complete Report
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	No signature	GN0006	Y.2	GR Discontinuance - Incomplete Periodic Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	No signature	GN0006	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
Fresno	QR 7 (12/08)	Quarterly Eligibility/Status Report	No signature	GN0006	Y	General Relief Discontinuance - Incorrect/Incomplete QR7
Orange	QR 7 (12/08)	Quarterly Eligibility/Status Report	No signature	GN0006	F063-26-14Y	GR Discontinuance - Incomplete QR7
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	No signature	GN0006	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	Did not date	GN0007	Y.2	GR Discontinuance - Incomplete Periodic Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	Did not date	GN0007	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
Fresno	QR 7 (12/08)	Quarterly Eligibility/Status Report	Did not date	GN0007	Y	General Relief Discontinuance - Incorrect/Incomplete QR7

Returned Periodic report				Resulting Document to Trigger		
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
Orange	QR 7 (12/08)	Quarterly Eligibility/Status Report	Did not date	GN0007	F063-26-14Y	GR Discontinuance - Incomplete QR7
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Did not date	GN0007	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	Dated before first of the month	GN0008	Y.2	GR Discontinuance - Incomplete Periodic Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	Dated before first of the month	GN0008	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
Fresno	QR 7 (12/08)	Quarterly Eligibility/Status Report	Dated before first of the month	GN0008	Y	General Relief Discontinuance - Incorrect/Incomplete QR7
Orange	QR 7 (12/08)	Quarterly Eligibility/Status Report	Dated before first of the month	GN0008	F063-26-14Y	GR Discontinuance - Incomplete QR7
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Dated before first of the month	GN0008	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	Information not provided for Y-N answer	GN0009	Y.2	GR Discontinuance - Incomplete Periodic Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	Information not provided for Y-N answer	GN0009	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
Fresno	QR 7 (12/08)	Quarterly Eligibility/Status Report	Information not provided for Y-N answer	GN0009	Y	General Relief Discontinuance - Incorrect/Incomplete QR7
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Information not provided for Y-N answer	GN0009	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	You failed to answer all the questions on the CW 7	GN0010	Y.2	GR Discontinuance - Incomplete Periodic Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	You failed to answer all the questions on the CW 7	GN0010	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
Fresno	QR 7 (12/08)	Quarterly Eligibility/Status Report	You failed to answer all the questions on the CW 7	GN0010	Y	General Relief Discontinuance - Incorrect/Incomplete QR7
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	You failed to answer all the questions on the CW 7	GN0010	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder

Returned Periodic report				Resulting Document to Trigger		
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	Need proof of information reported	GN001 1	Y.2	GR Discontinuance - Incomplete Periodic Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	Need proof of information reported	GN001 1	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
Fresno	QR 7 (12/08)	Quarterly Eligibility/Status Report	Need proof of information reported	GN001 1	Y	General Relief Discontinuance - Incorrect/Incomplete QR7
Orange	QR 7 (12/08)	Quarterly Eligibility/Status Report	Need proof of information reported	GN001 1	F063-26-14Y	GR Discontinuance - Incomplete QR7
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Need proof of information reported	GN001 1	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	One or Two Required Signature Missing	GN001 2	Y.2	GR Discontinuance - Incomplete Periodic Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	One or Two Required Signature Missing	GN001 2	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
Fresno	QR 7 (12/08)	Quarterly Eligibility/Status Report	One or Two Required Signature Missing	GN001 2	Y	General Relief Discontinuance - Incorrect/Incomplete QR7
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	One or Two Required Signature Missing	GN001 2	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	All Income Not Reported	GN001 4	Y.2	GR Discontinuance - Incomplete Periodic Report
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	All Income Not Reported	GN001 4	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
San Diego	QR 7 (12/08)	Quarterly Eligibility/Status Report	No Verification of Assets	GN002 0	Y.2	GR Discontinuance - Incomplete Periodic Report
San Mateo	QR 7 (12/08)	Quarterly Eligibility/Status Report	No Verification of Assets	GN002 0	Y 3	GA Discontinuance - Failure to Provide Complete QR 7
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	No Verification of Assets	GN002 0	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Information provided earlier not reported	GN000 5	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Missing pay stubs	GN002 6	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder

Returned Periodic report				Resulting Document to Trigger		
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	CW 72 Incomplete	GN0037	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Employment Information Missing	GN0021	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Unearned Income Not Verified	GN0028	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Earned Income Not Verified	GN0024	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
Sacramento	QR 7 (12/08)	Quarterly Eligibility/Status Report	Did not answer all questions correctly on the QR7	GN0036	NA 960 Y (04/04)	GA QR 7 Incomplete - Discontinuance Reminder
San Diego	CW 7	Monthly Eligibility Report	No signature	GN0006	Y-2	GR Discontinuance - Incomplete Periodic Report
San Diego	CW 7	Monthly Eligibility Report	Did not date	GN0007	Y-2	GR Discontinuance - Incomplete Periodic Report
San Diego	CW 7	Monthly Eligibility Report	Dated before first of the month	GN0008	Y-2	GR Discontinuance - Incomplete Periodic Report
San Diego	CW 7	Monthly Eligibility Report	Information not provided for Y N answer	GN0009	Y-2	GR Discontinuance - Incomplete Periodic Report
San Diego	CW 7	Monthly Eligibility Report	You failed to answer all the questions on the CW 7	GN0010	Y-2	GR Discontinuance - Incomplete Periodic Report
San Diego	CW 7	Monthly Eligibility Report	Need proof of information reported	GN0011	Y-2	GR Discontinuance - Incomplete Periodic Report
San Diego	CW 7	Monthly Eligibility Report	One or Two Required Signature Missing	GN0012	Y-2	GR Discontinuance - Incomplete Periodic Report
San Diego	CW 7	Monthly Eligibility Report	All Income Not Reported	GN0014	Y-2	GR Discontinuance - Incomplete Periodic Report
San Diego	CW 7	Monthly Eligibility Report	No Verification of Assets	GN0020	Y-2	GR Discontinuance - Incomplete Periodic Report
Santa Cruz	CW 7	Monthly Eligibility Report	No signature	GN0006	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification
Santa Cruz	CW 7	Monthly Eligibility Report	Did not date	GN0007	Y-2	Discontinuance - GA Disc For Failure to

Returned Periodic report				Resulting Document to Trigger		
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
						Provide Information or Verification
Santa Cruz	CW 7	Monthly Eligibility Report	Dated before first of the month	GN0008	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification
Santa Cruz	CW 7	Monthly Eligibility Report	Information not provided for Y-N answer	GN0009	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification
Santa Cruz	CW 7	Monthly Eligibility Report	You failed to answer all the questions on the CW 7	GN0010	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification
Santa Cruz	CW 7	Monthly Eligibility Report	Need proof of information reported	GN0011	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification
Santa Cruz	CW 7	Monthly Eligibility Report	One or Two Required Signature Missing	GN0012	Y-2	Discontinuance - GA Disc For Failure to Provide Information or Verification
Santa Barbara	CW 7-GR	Monthly Eligibility Report	No signature	GN0006	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	Did not date	GN0007	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	Dated before first of the month	GN0008	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	Information not provided for Y-N answer	GN0009	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	Need proof of information reported	GN0011	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	One or Two Required Signature Missing	GN0012	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	All Income Not Reported	GN0014	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	No Verification of Assets	GN0020	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	Shelter Expense Not Verified	GN0027	Y-2	GR Disc - Monthly Report Incomplete

Returned Periodic report				Resulting Document to Trigger		
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
Santa Barbara	CW 7-GR	Monthly Eligibility Report	Unearned Income Not Verified	GN0028	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	Employment Information Missing	GN0021	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	All boxes were not checked	GN0032	Y-2	GR Disc - Monthly Report Incomplete
Santa Barbara	CW 7-GR	Monthly Eligibility Report	Earned Income Not Verified	GN0024	Y-2	GR Disc - Monthly Report Incomplete
Solano	48-70-20 (REV 3/12)	GA Income/Job Search Report	Part A Incomplete	GN0016	W	GA - Discontinuance Income Report Related
Solano	48-70-20 (REV 3/12)	GA Income/Job Search Report	Part B Incomplete	GN0017	W	GA - Discontinuance Income Report Related
Solano	48-70-20 (REV 3/12)	GA Income/Job Search Report	Part C Incomplete	GN0018	W	GA - Discontinuance Income Report Related
Solano	48-70-20 (REV 3/12)	GA Income/Job Search Report	Part D Incomplete	GN0019	W	GA - Discontinuance Income Report Related
Contra Costa	GA-QR7	GA Quarterly Status Report	Unearned or Disability Based Income Not Verified	GN0043	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	Property Change Not Verified	GN0047	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	Earned Income Change Incomplete	GN0044	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	Marital Status or Pregnancy Change Not Verified	GN0051	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	Unearned or Disability Based Income Change Incomplete	GN0042	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	Legal/Immigration Status Change Incomplete	GN0052	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	No signature	GN0055	030 Y	GA Disc: Failure to Submit Complete

Returned Periodic report				Resulting Document to Trigger		
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
						GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	Address or HH Composition Change Incomplete	GN0040	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	Did not date	GN0056	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Contra Costa	GA-QR7	GA Quarterly Status Report	Earned Income Change Not Verified	GN0045	030 Y	GA Disc: Failure to Submit Complete GA-QR7 (2, 4, 6 Month Sanction)
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	No signature	GN0006	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Did not date	GN0007	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Dated before first of the month	GN0008	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Information not provided for Y-N answer	GN0009	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	You failed to answer all the questions on the CW 7	GN0010	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Need proof of information reported	GN0011	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Information provided earlier not reported	GN0005	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	All boxes were not checked	GN0023	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Employment Information Missing	GN0021	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Earned Income Not Verified	GN0024	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Employment Not Verified	GN0025	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Missing pay stubs	GN0026	GA Y	GA Discontinuance - Incomplete Income Report

Returned Periodic report			Resulting Document to Trigger			
County	Form Number	Customer Reporting Form Name	Incomplete Reason	Reason code	Negative Action NOA Number	Negative Action NOA Name
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Shelter Expense Not Verified	GN0027	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	No signature	GN0012	GA Y	GA Discontinuance - Incomplete Income Report
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	Unearned Income Not Verified	GN0028	GA Y	GA Discontinuance - Incomplete Income Report

Technical Note: Create Code Detl Category for the Customer Reporting Negative Action Correspondence records in Recommendation 2.1, 2.2, 2.3, 2.4

2.3.4 Miscellaneous Parameters

N/A

2.4 Add Balderas Notice Trigger for Incomplete Customer Reporting

2.4.1 Overview

Triggered in batch for a case when a client fails to return an incomplete income report for the reporting period Correspondence Information

2.4.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
GN0030	Santa Clara	Form	N/A	GA/GR Five Days to Determine Good reason-Incomplete SAR 7	spltr 931	325113

2.4.3 Description of Change

Create New Batch Job for the Santa Clara county to trigger the Correspondence for cases with following conditions on the 6th day from the end of the month:

1. Periodic Reporting Correspondence has been returned for the report month and in 'Incomplete' status without any reason.
2. GA/GR Automated EDBC/CC Counties solution program status is active currently.
3. A Negative action is to send Balderas Notice.

Customer Reporting Negative Action Correspondences:

	Document returned		Resulting Triggered Document	
County	Form Number	PR Form Name	Negative Action Form Number	Negative Action Form Name
Santa Clara	SAR 7 (12/14)-SCL	Semi Annual Eligibility/Status Report SCL	spltr 931	GA/GR Five Days to Determine Good reason-Incomplete SAR 7

Technical Note: Create Code Detl Category for the Customer Reporting Negative Action Correspondence records in Recommendation 2.1, 2.2 ,2.3, 2.4

4. For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a Balderas Notice Trigger for Incomplete Customer Reporting form during batch forms processing.

Transaction values:

- q. Case ID: Case associated to GA/GR Automated EDBC/CC Counties Program
- r. Program ID: Program ID
- s. Person ID: Primary Applicant of Active GA/GR Automated EDBC/CC Counties Program
- t. Type Code: FR
- u. Sub Type Code: TBD by build
- v. Eff Date: Batch Date
- w. Created By: Batch
- x. Updated By: Batch

2.4.4 Execution Frequency

Schedule batch job to run monthly on the 6th day from the end of the month.

2.4.5 Key Scheduling Dependencies

This job will run before forms balancers.

2.4.6 Counties Impacted

This job will run all counties in the Requirement

2.4.7 Data Volume/Performance

N/A

2.4.8 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.4.9 Miscellaneous Parameters

N/A

2.5 Customer Reporting Detail Page

2.5.1 Overview

Currently same Incomplete Reasons are available for all the Periodic Reporting Forms for GA/GR Automated EDBC/CC Counties solution program for all counties.

Report Type:
CSF 35

Submit Month:
02/2021

Date Received:
02/01/2021

Personal Contact:

No ▾

Status			
Program	Status	Status Detail	Date
GA	Incomplete ▾	Pending Incomplete ▾	<input type="text"/>

PR - Incomplete Reasons	
<input type="checkbox"/> No signature	<input type="checkbox"/> All boxes were not checked
<input type="checkbox"/> Complete circled items	<input type="checkbox"/> Did not date
<input type="checkbox"/> Information provided earlier not reported	<input type="checkbox"/> Dated before first of the month
<input type="checkbox"/> Failed to provide information related to Income and Eligibility Verification System	<input type="checkbox"/> Income Change-Need proof
<input type="checkbox"/> Missing pay stubs	<input type="checkbox"/> Need proof of information reported
<input type="checkbox"/> Not signed by appropriate persons	<input type="checkbox"/> 1 of 2 required signatures missing
<input type="checkbox"/> Information not provided for Y-N answer	

General Assistance/General Relief Status History

2.5.2 Description of Change

1. Add SAR 7 (12/14) – SCL, CW7-GR, QR7 (12/08) forms to the Customer Reporting for GA/GR Automated EDBC/CC Counties solution program.
2. SAR 7 (12/14) – SCL, CW7-GR, QR7 (12/08) forms will be viewable and editable in the same manner as any of the other forms that are currently in the system in customer reporting list page.
3. SAR 7 (12/14) – SCL, CW7-GR, QR7 (12/08) forms will follow current "Status" labeling practices.
4. SAR 7 (12/14) – SCL forms will have the option to select 'Incomplete' status without selecting an incomplete reason.
5. Add and display the Incomplete Reasons listed in GAGR Periodic Reporting Incomplete Reasons.xlsx (Supporting document 2) for the counties opted in for GA/GR Automated EDBC/CC Counties solution specific to the GA/GR Periodic Reporting forms for the county.

2.5.3 Page Location

- **Global: Eligibility**

- **Local: Reporting**
- **Task: Customer Reporting**

2.5.4 Security Updates

There are no updates to the security settings

2.5.5 Page Mapping

There are no updates that require new page mapping.

2.5.6 Page Usage/Data Volume Impacts

There are no updates that impact the page usage or data volume.

2.6 Data Grouping Indicators

2.6.1 Overview

This Section deals with updating Data group Indicators for Correspondences implemented in the Prior Releases

2.6.2 Description of Change

Update Data Grouping Indicator for the following Correspondences for sending the Data group related Data with Generate Document request.

Document Name	Number	Template	Reason Code	Data Groupings
GA Decrease - Overpayment Adjustment	774 1 (10/10)	12662	X30011	Benefit Issuance
GA/GR Change-Overpayment Adjustment	GA 936	12295	X30011	Benefit Issuance
GA Decrease O/P Adjustment	P	12107	X30011	Benefit Issuance
GA Decrease - Overpayment Adjustment	774 1 (10/10)	12662	X30012	Benefit Issuance
GA/GR Change-Overpayment Adjustment	GA 935	610916	X30012	Benefit Issuance
GA Decrease O/P Adjustment	P	12107	X30012	Benefit Issuance
GA Decrease O/P Adjustment	P	12107	X30013	Benefit Issuance
GA Demand Repayment of Overpayment (when case is being closed)	C-2 (01/02)	12546	X30031	Benefit Issuance
General Relief Overpayment Adjustment	788-C2	12622	X30032	Benefit Issuance

GA Overpayment Notification and Start Grant Adjustment	356-4 (01/02)	12549	X30032	Benefit Issuance
General Relief Overpayment Adjustment	788-C2	12622	X30033	Benefit Issuance
GA Overpayment Notification and Start Grant Adjustment	356-4 (01/02)	12549	X30033	Benefit Issuance
GA Overpayment Notice	YC GA 501	607395	500019	Benefit Issuance

2.7 Add Notification to Facility Operator Form

2.7.1 Overview

This section describes the Notice of Action (NOA)/Form triggers that will be created depending on the resulting EDBC reason. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.7.2 Correspondence Information

1. **Reason Code: E10061 - Resident in a Board and Care or Room and Board facility**

a. Trigger Condition

Form will be triggered if the current EDBC has the 'Resident in a Board and Care or Room and Board facility' display reason and the previous EDBC did not.

b. County-specific information:

County	Action	Document Description	Number	Template
Santa Clara	N/A	Notification to Facility Operator	GA 18A (0992)	609703

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Periodic Reporting Negative Action	Negative Action Required Indicators for Periodic Reporting Correspondences	Periodic Reporting Negative Action Required.xlsx
2.	Periodic Reporting Incomplete Reasons	Incomplete Reasons for Periodic reporting for Different county	GAGR Periodic Reporting Incomplete Reasons.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2319	<p>The CONTRACTOR shall update the CalSAWS Software with current available automated CalWIN county specific NOA's and Forms associated to their GA/GR program.</p> <p>The CONTRACTOR shall update the CalSAWS software to trigger and generate county</p>	<p>Correspondence- Forms:</p> <ol style="list-style-type: none"> There are a total of 180 non EDBC triggered forms of which <ul style="list-style-type: none"> 53 forms will be manually generated from template repository. 93 forms will be triggered from CalSAWS and generated through DXC service. 34 forms will use current CalSAWS triggers and the corresponding version available. All GA/GR specific and combo program State forms will be triggered/generated through CalSAWS except if any form is customized by county already in CalWIN. In that case, DXC service will be called just for that county alone to generate the form PDF. All GA/GR specific and combo program Non-State forms will be generated through DXC service. Whenever required CalSAWS will call the GA/GR Correspondence service with all the data related to the case. 	<p>This requirement is met based on the "NOAs listed in Appendix A" supplemented by the functionality described in this design document.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>specific NOAs and Forms based upon each counties eligibility rules.</p>	<p>4. New functionality will be added to CalSAWS to determine form generation based on county.</p> <p>5. All CalSAWS generated state forms will not have capability to add/modify data elements by user. The existing CalSAWS capability to append text to the NOA pdf will be available to the user.</p> <p>6.If any manual variables are needed, print queue will be accessed through iFrame by calling DXC service where user will be able to add manual variables.</p> <p>Correspondence - NOAs:</p> <p>1.The triggers for 164 NOAs will be developed in CalSAWS and DXC Correspondence Service will be called with the case/program information to render the NOA pdf.</p> <p>2.If any manual variables are needed, print queue will be accessed through iFrame by calling DXC service where user will be able to add manual variables.</p>	

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2686	The CONTRACTOR shall integrate the CalWIN GA/GR rules into the CalSAWS Software.	<ol style="list-style-type: none"> 1. The existing CalWIN GA/GR rules will be developed in CalSAWS. 2. The Forms/NOA will be rendered by DXC using the Correspondence Service. The triggers conditions for the Forms/NOAs will be developed in CalSAWS. 3. The Users will use Run EDBC page to run GA/GR EDBC and authorizes the results like other programs. The Users will navigate to Correspondence page after Authorization to check the existence of a NOA. A NOA hyperlink will be created if EDBC resulted in a NOA. When the User clicks the NOA hyperlink a webservice call will be made to DXC Correspondence Service to render the NOA and return the pdf back to CalSAWS in real time. During this webservice call the entire data related to the case will be transferred. This includes but not limited to Data Collection, Prior Issuances, Address, Assigned worker details 4. Override functionality for the EDBC determined by GA/GR service will be available in CalSAWS. 5. Manual EDBC functionality will be available in CalSAWS. 6. The new GR solution will have a separate program code in backend so that the existing LA county GR and C-IV Managed/Non-Managed GR programs will not be impacted. 7. Preview NOA functionality will not be available for the new GA/GR solution 8. This solution will be subject to a different SLA standard due to external NOA service interaction. 9. The use case for current CalWIN GA/GR rules, NOAs/Forms triggers and MU triggers will be provided by DXC. 10. Based on Use case CalWIN GA/GR rules, NOAs/Forms triggers and Batch Sweeps for MU triggers will be designed and developed in CalSAWS. 11. The existing NOA/form templates and County Admin's ability to create a customizable pdf version for the county will be maintained and updated by DXC in the new solution. 	This requirement is met by created correspondences from the Eligibility Rules and a framework to call the GA/GR Correspondence Service for the correspondence documents rendering.

*Note: DXC is now referred to as Gainwell

5 MIGRATION IMPACTS

General Assistance/General Relief functionality will be implemented as a new program for the 57 counties aside from Los Angeles. Los Angeles GA/GR functionality will not be modified.

6 APPENDIX
