

## 90-600.09. MONTHLY/QUARTERLY REPORTING

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### A. General

This section provides information regarding the monthly/quarterly reporting requirements of the GR Program.

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### B. Policy

The required monthly eligibility report form for AB is the CW 7. The required quarterly eligibility report form for EL, IP and IAP is the QR 7. The forms are automatically produced and mailed by CalWIN for GR cases and a face-to-face interview is not required. Budgeting is prospective for GR.

All GR applicants who are found eligible for GR at Intake shall be informed of the requirement to turn in a CW 7/QR 7 for review of any changes. The applicant returns the CW 7/QR 7 by mail, although it can be accepted if delivered in the FRC.

The CW 7/QR 7 shall be due on the 5<sup>th</sup> day of the month following the reporting month. The due date will be later when the 5<sup>th</sup> day of the month falls on a weekend or a holiday.

Although the due date for the CW 7/QR 7 is the 5<sup>th</sup> day of the month, workers must accept and process the form through the end of the month due.

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### C. Intake Procedures

The intake worker shall follow the actions in the table below.

Step	Action
1	Give the applicant/recipient a CW 7/QR 7 for the next month/quarter.
2	Inform the applicant/recipient of the due date for the CW 7/QR 7.
3	Inform AB applicants/recipients to mail their job searches with the CW 7.

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### D. Guidelines for Completeness

The worker shall evaluate the CW 7/QR 7 for completeness. The guidelines to determine if the CW 7/QR 7 is complete are:

- All questions must be answered. However, if the question is not answered, the CW 7/QR 7 shall be considered complete if information/ verification is provided that indicates a “yes” answer.
- If a change of address is reported, then the questions asking “Are you paying rent at the address you have listed?” and “Paying utilities?” must be answered. Verification of shelter costs is required for GR whenever a change is reported or known.
- Appropriate verification(s) must be attached.
- All aided adults, and spouses in the home even if not aided, must sign and date the CW 7/QR 7 no sooner than the first of the month in which it is due.

If the above guidelines have ...	Then the ...
been met,	CW 7/QR 7 is complete.
not been met,	worker must place the case in suspense.

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### E. Worker Communication

Workers with companion cases shall communicate with one another to determine if the CW 7/QR 7 was received.

The GR worker shall communicate with the CalFresh worker any changes in the GR grant and status of the case.

If the GR recipient is assigned to a Work Project, the GR worker shall communicate to the CalFresh Employment and Training (CalFresh E&T) Social Worker changes to Work Project hours and status of the case.

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### F. Quarterly Reporting Definitions

The table below provides terms used for quarterly reporting (QR 7).

Term	Definition
County Initiated Mid-Quarter Actions	The changes in eligibility status based on case information that the worker is required to act mid-quarter, such as sanctions, approval of benefits in another case, or cost-of-living changes.
Mid-Quarter Change	Any change reported during the QR Payment Quarter that is outside the QR 7 report process. There is one type of mid-quarter report: A mandatory report is a report a recipient is required to make within 5 days of the occurrence. Workers must take action to change benefits based on mid-quarter reports.

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### G. Quarterly Reporting Cycle Description

The QR cycle is comprised of three consecutive months. The three months constitute a QR Payment Quarter. The terminology to describe the months and the quarter of an individual QR cycle are described in the table below:

Term	Description
QR Data Month	The month for which the recipient reports all information necessary to determine eligibility. The QR Data Month is the second month of each quarter.
Submit Month	The month in which the QR 7 is required to be submitted to the worker. This month immediately follows the QR Data Month and is the third month of each quarter.
QR Payment Quarter	The quarter in which benefits are paid in the 3-month period immediately following the QR Submit Month.

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**Quarterly Reporting Cycle Description**  
(continued)

The following table shows how months are arranged in a QR cycle.

1 <sup>st</sup> Quarter			2 <sup>nd</sup> Quarter		
Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
1 <sup>st</sup> month of the quarter	QR Data Month	QR Submit Month	QR Payment Quarter		

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**H. Establishing a Quarterly Reporting Cycle**

There are 3 reporting cycles: Cycle 1, Cycle 2, and Cycle 3. New applications are assigned one of the three cycles, based on the approval month (application month).

If the approval month is ...	Then the reporting cycle is ...
January, April, July, or October,	Cycle 1.
February, May, August, or November,	Cycle 2.
March, June, September, or December,	Cycle 3.

Approval Month/QR Payment Quarter	QR Data Month	QR Submit Month
<b>Cycle 1</b>		
January April July October	February May August November	March June September December
<b>Cycle 2</b>		
February May August November	March June September December	April July October January
<b>Cycle 3</b>		
March June September December	April July October January	May August November February

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**I.**  
**Example 1:**  
**AB to EL**

**Situation**

Application approved as AB in June 2014. Recipient submits a CSF 24, which states unable to complete Work Project in July 2014. He will be considered EL as of August 2014.

**Report Due**

Since he was approved in June 2014, he will be in Cycle 3. The first submission month is August 2014.

<b>If the CW 7 has ...</b>	<b>Then the worker will ...</b>
already been issued,	accept the CW 7 submitted in August.
not been issued,	manually issue a QR 7 for submission in August.

The next report will be due in November 2014.

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**J.**  
**Example 2:**  
**EL to AB**

**Situation**

Application approved as EL in June 2014. His medical exemption expires July 31, 2014 and he requests to be aided as AB. He will be considered AB as of August 2014.

**Report Due**

Since he was approved in June 2014, he is in Cycle 3. The first submission month is August 2014.

<b>If the QR 7 has ...</b>	<b>Then the worker will ...</b>
already been issued,	accept the QR 7 submitted in August.
not been issued,	manually issue a CW 7 for submission in August.

The next report will be due in September 2014.

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