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Issue date: 11/24/2014

Effective date: 11/24/2014

Purpose:
The purpose of this memo is to state the policy and procedure on the creation, structure and distribution of Program Guide Material.

Background:
Eligibility Operations Program Specialist staff develop Program Guide Material for CalWORKs, CalFresh, Medi-Cal, Cash Assistance Program for Immigrants, General Relief, and County Medical Services based on All County Welfare Directors' Letters (ACWDLs), All County Letters (ACLs), All County Information Notices (ACINs), Medi-Cal Eligibility Division Information Letters (MEDILs) and State/Federal legislation, as well as other program directives received from the State, Federal or County government.

Program Guide Material needs to be clear and concise while maintaining necessary program information to provide direction and guidance regarding implementation of program rules and regulations. All Program Guide Material will be written in accordance with the Program Style Writing Guide (link). It should also include links to State and Federal laws, State regulations, and procedures to direct staff to more detailed program information. Going forward, the style of all Program Guide Material listed below will:
- Summarize Federal and State laws, regulations and procedures
- Use process maps and flow diagrams whenever possible
- Be regarded as the user's guide for policy and procedures
- Be issued as one piece of Program Material when it affects more than one program

These policies and procedures have been developed to determine how material will be issued and the format that is most appropriate. Formats include: Program Guide Letters, Program Guide Material, Special Notices, Eligibility Policy and Procedures Guide, Processing Guides, Reference Material, and Memos. Program Guide Letters, Program Guide Material, Special Notices, and Eligibility Policy and Procedures Guide are public-facing and contain links to other documents as needed.

Use the criteria below to determine the appropriate format to use when issuing material.

Program Guide Letters: Program Guide Letters introduce new material for the Program Guides. They may include one-time instructions for the implementation of the Program Guide changes. They do not include forms, Business Engineering Design Strategies (BEnDS), or other ancillary documents.

Program Guides: Program Guides summarize policies and regulations related to eligibility programs. Program Guides contain published information from County, State and Federal government, and provides guidance and direction to Eligibility staff. Program Guides contain chapters/article, sections, and sub-section/items. They do not contain forms, BEnDS, or other ancillary documents.

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Special Notices: Special Notices address individual elements of a program, providing instruction and procedures as needed. They are time limited, and may or may not be incorporated into the Program Guide. Special Notices follow the same sign-off process as Program Guide Letters, but do not change the Program Guide itself.

Examples of what Special Notices include:
- Cost of Living Adjustments (COLA)
- Federal Poverty Level (FPL) changes
- Minimum Wage changes
- Special projects
- Waivers with time-lines
- Pilot projects

Eligibility Policy & Procedures Guide: Eligibility Policy & Procedures Guide (formerly Eligibility Desk Guide), includes regulations and requirements, as well as instructions and procedures that affect multiple programs, examples include: National Voters' Rights Act, Civil Rights, and e-notices.

Reference Materials: Reference Materials provide specific guidance and direction to staff and will be maintained on a SharePoint site. Reference Materials may include, but is not limited to, the items below:

- **Memos**: Memos are internal documents (not public facing) that are issued for a process, procedure, or policy that may need to be referenced in the future. Before issuance, memos must be reviewed and approved by the program manager.
  Memos may include, but are not limited to:
  - Policy clarification
  - Reminders
  - Revised correspondence
- **Emails**: Emails are messages that are distributed electronically (Outlook). Emails should contain non-critical information that does need to be referenced in the future. Emails should be brief (no more than one screen) and may contain feedback, notifications, reminders, or instructions and may contain attachments and/or links.
- **Processing Guides**: Processing Guides include specific and detailed operational and procedural information needed by staff to ensure the timely and accurate implementation of program, policy and procedures.
- **Ehitbulletins**: Ehitbulletins are specific to the Medi-Cal Program and contain information related to the interface between CalWIN and CalHEERs.
- **Desk Aids**: Desk Aids provide a quick reference to information for county staff to support accurate implementation and processing.
- **Q&A**: Q&A documents are for the purpose of providing guidance to County staff and contain responses to questions posed by Eligibility and other affected staff based on program, policy, procedural or automation changes.

Procedure: Policy Maintenance-Review Process

Based on the new writing style, Program Guide Material will focus on summarizing Federal laws and State laws and regulations.

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All Program Guide Material will use the appropriate template for <u>Program Guide Letters</u>, <u>Program Guide Material</u>, <u>Special Notices</u>, or <u>Processing Guides</u>.

Whenever possible, if previously issued material is amended or revised, staff should attempt to remove and replace material, rather than only to it.

Program Material Review Meeting:
Monthly meeting when staff reviews and updates the Program Guide Material Tracking Log. Incoming State-issued ACLs, ACWDLs, MEDILS, and ACINs are reviewed at this meeting to determine its appropriate disposition (release Program Guide Material, or not). Staff will review pending Program Guide Material during this meeting. The Program Guide Material Tracking Log will be updated and distributed monthly.

Program Guide Material Creation and Signoff Process:
Following the Program Material Review Meeting, staff will have up to 30 days to create draft Program Guide Material. Using the Program Guide Material Route Slip, staff sends the draft material to the required staff to review and approve the material, before it is issued. Staff will provide a minimum of 1 week (7 calendar days) to review draft materials before the **Family Resource Center (FRC)/EO Program Review Meeting.** This time frame is subject to review, as needed.

FRC/EO Program Review Meeting:
This meeting includes FRC representatives, as well as EO staff. Draft Program Guide Material will be shared via video conferencing. For this meeting, EO staff will come prepared to present new program material that was sent out for review in the week(s) or month(s) prior to the meeting. The following actions are the focus of this meeting:
- Review the draft Program Material
- Receive input and edits from FRCs
- Include new information, if needed.

Final Program Guide Material will be published within 60 days of the release of the State letter.

Program Material Life Cycle
- Federal or State legislation enacted
- State issues ACL, ACWDL, ACIN, or MEDIL
- Program Review Meeting occurs within 30 days of the release of the ACL, ACWDL, ACIN, or MEDIL, decision made at meeting to determine Program Guide Material disposition (Program Guide Material or not)
- Staff writes draft Program Material
- Draft Program Material sent through signoff process. FRC/EO Program Review meeting within 30 days of decision
- Final Program Material published and distributed within 60 days of release of State letter

Sunset Review:
Program Guide Letters, Program Guide Material, Eligibility Policy and Procedures Guide, and Processing Guides will have a three (3)-year Sunset Date.

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Special Notices will have a one (1)-year Sunset Date unless otherwise directed.

Semi-annually, staff will review the Program Material before the sunset date to ensure the information is still valid and accurate, and will determine if the Material will be retired or re-published.

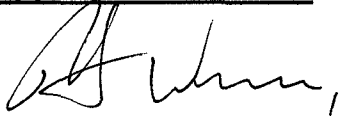Reference material not referenced above has no Sunset Date.

Impacts:
All Programs

References:
None

Sunset Date: 11/24/2017

Approval for release: