

**County of San Diego, Health and Human Services Agency (HHS)**  
**CalWORKs Program Guide Letter**

**Welfare-to-Work Orientation and Appraisal**

**Number**

**370**

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**Issue date:**

12/14/2015

**Effective Date:**

Upon Receipt

**Purpose:**

To provide Employment Services (ES) Contractors policy and procedural instructions regarding the Welfare-to-Work (WTW) Orientation (ORE) and Appraisal (APR).

**Background:**

ORE and APR are the first mandatory WTW activities for all CalWORKs recipients who are required to participate in WTW or are exempt and choose to participate as volunteers.

**Policy Change:**

The Online CalWORKs Appraisal Tool (OCAT) is a standardized APR tool that is to be used by all counties in California and was implemented in San Diego County as of 08/03/2015. OCAT is designed for use when any of the following occurs:

- A participant attends the WTW initial ORE/APR
- Any participant has a break in aid of 30 calendar days or more or after an exemption from WTW of at least 30 calendar days or more (Must also complete ORE along with OCAT APR)
- A participant is referred to WTW as an Exempt Volunteer (Must also complete ORE along with OCAT APR)
- An Exempt volunteer whose WTW status changes to registered mandatory (Must also complete ORE along with OCAT APR)
- A WTW sanctioned participant attends ORE/APR to cure sanction
- A WTW participant sanctioned for any reason besides ORE/APR requests to cure his/her sanction and is identified with a major barrier(s) or if there is evidence that previous WTW activities completed by the participant were not beneficial in moving participant toward self-sufficiency
- An existing participant with no break in aid of 30 days or more who is identified as having a major barrier(s) or if there is evidence that previous WTW activities completed by the participant were not beneficial in moving participant toward self-sufficiency

The following are considered major barriers: being homeless or at risk of becoming homeless, Domestic Violence, Substance Abuse, Mental Health, possessing a felony, Human Trafficking, and Learning Disabilities.

**Summary of Changes:**

**10-005.D. Welfare-to-Work Orientation and Appraisal:**

- Entire CPG section was reformatted to adhere to new format used by Eligibility Operations.
- Removed obsolete and unnecessary information.
- Updated policy and procedural instructions to incorporate the use of OCAT.

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- Added the Appraisal 2 activity in CalWIN for Employment Case managers (ECMs) to use in crediting OCAT completion for existing participants.
- As of 08/06/2015 WTW Participant profile form (27-01) will no longer be required to be completed during OCAT APR **unless** a participant refuses to complete OCAT.
- As of 09/01/2015 WTW Behavioral Health Screening Result form (27-63) will no longer be provided to ES staff by the AOD/MHS Contractor.
- Language Needs Determination Form (20-46) and I-94 Arrival/Departure Record will no longer be obtained by ECMs as of 07/01/2015. ECMs will instead refer to the latest captured version in the CalWIN Electronic Records Management System (CERMS) obtained by Family Resource Center staff.
- Changes to the CPG are noted with **highlighted text**.

**Processing Guide 10-005.D.1 Welfare-to-Work Orientation and Appraisal:**

- Processing guide is located in the [CalWIN Intranet](#) for internal staff use.

**Impact/s:**

Automation:

No impact

Forms and Document Capture:

No impact

Other Programs Affected:

Welfare-to-Work

Quality Control:

QC will cite the appropriate error on any case that does not comply with the requirements outlined in this material.

Management Reporting:

None

**References:**

[ACL 15-43](#)

[ACL 15-69](#)

[MPP 42-711.52](#)

**Sunset Date:**

This policy will be reviewed for continuance by 12/31/2018.

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**Approval for Release:**



Rick Wanne, Director  
Eligibility Operations