

CalWORKs PROGRAM GUIDE
Special Notice
10-07 ADDENDUM-A

Subject **TRANSITION OF CALWORKS WELFARE-TO-WORK AND REFUGEE EMPLOYMENT SERVICES CASE MANAGEMENT FOR EAST REGION**

Reference CalWORKs Program Guide Special Notice 10-07 *TRANSITION OF CALWORKS WELFARE-TO-WORK AND REFUGEE EMPLOYMENT SERVICES CASE MANAGEMENT FOR NORTH AND CENTRAL REGIONS*

Effective August 1, 2010

Purpose This Special Notice pertains to the **East Region only**. A separate Special Notice with transition procedures will be issued for the South Region at a later date.

The purpose of this Special Notice is to:

- Inform staff of the new CalWORKs Welfare-to-Work/Refugee Employment Services Case Management and Stage 1 Child Care Payment Services Contracts and provider changes for the **East** Region;
- Communicate activities related to the transition of the CalWORKs Welfare-to-Work and Refugee Employment Services Case Management and Stage 1 Child Care Payment Services from the current provider to the new service providers in the **East** Region.

Employment Service Locations Effective August 1, 2010, the WTW/RES Case Management and Stage 1 Child Care provider for the East Region is Public Consulting Group (PCG).

PCG shall provide the following Employment Services under this contract at the following region/sites:

Region	Provider	Services	Address	Main Phone Number
Region 3 East	PCG	<ul style="list-style-type: none"> • WTW Case Management Services • RES Case Management Services • Child Care Payment Services 	133 West Main Street, 2 nd Floor El Cajon, CA 92020 Mail Stop - W454	888-752-8138 (Toll Free)
Region 3 East	PCG	<ul style="list-style-type: none"> • WTW Orientation • WTW Job Club 	7065 Broadway Lemon Grove, CA 91945 Mail Stop - W418	888-752-8138 (Toll Free)

General Transition Activities (WTW/RES)

The guidelines below are to be adhered to for the following WTW/RES transition activities:

Activity	Action
WTW/RES Case Reconciliation	SPOS shall complete Case Reconciliation for all WTW/RES cases in the East region, with the completion target date of July 30, 2010.
CalWIN System Access	Effective August 1, 2010, activities to change, add, and delete system access for staff shall be completed for PCG staff.
Mail Receipt and Delivery	Interoffice County mail received for mail stops which have been deleted or changed will be automatically forwarded to the appropriate site by Mail Services. All sites receiving U.S. Mail after the transition period shall forward all incoming U.S. mail to the new provider as appropriate.
Customer Notification of Transition	By July 23, 2010, SPOS shall mail a letter to all WTW/RES and Child Care clients with notification of the transition. The letter will include: <ul style="list-style-type: none"> • Effective date of change; and • Address and phone number of the new office, as appropriate. All regions are also required to leave voicemail messages on telephones that contain the new regional location, as appropriate, and effective date of change.
Quality Assurance Reviews	As of June 30, 2010, WTW/RES QA reviews will be postponed temporarily for all regions. WTW/RES QA reviews for East Region will resume in October 2010, for the August 2010 Monthly Progress Report (MPR) data month.
Program Compliance/Data Validation Reviews	As of October 2010, WTW/RES Program Compliance and Data Validation reviews for the East Region shall begin (the 3 rd month of the 1 st quarter).

Case Identification (WTW/RES)

The transition activities require identifying specific cases for an efficient turn-over/take-over from the current providers to the new providers. The case identification transition activities are to be completed by MAXIMUS, the current WTW provider, for the East Region.

Case Identification Criteria (WTW/RES)

East Region WTW staff shall identify cases that meet the following criteria; complete required case actions; and compile case lists for each of the following categories:

Activity	Case Action
WTW Orientation and Appraisal (ORE/APR)	<ul style="list-style-type: none"> • By July 15, 2010, PCG shall provide SPOS a listing of ORE/APR activity sessions to begin the week of August 9, 2010 for the East Region.

	<ul style="list-style-type: none"> • By July 20, 2010, SPOS shall enter PCG's ORE/APR activity sessions in CalWIN. • From July 20, 2010 through July 31, 2010, new WTW/RES referrals or cases that require the scheduling/rescheduling of ORE/APR shall be scheduled by MAXIMUS East Region WTW staff into PCG's activity slots for the East Region. • PCG shall utilize the Session Enrollment listing in CalWIN to manage cases assigned to ORE/APR. • By July 23, 2010, the last ORE/APR sessions facilitated by MAXIMUS East Region WTW staff must be completed with WTW participants and entered in CalWIN.
Job Club (JCL)	<ul style="list-style-type: none"> • By July 15, 2010, PCG shall provide SPOS a listing of JCL activity sessions to begin the week of August 9, 2010 for the East Region. • By July 20, 2010, SPOS shall enter PCG's JCL activity sessions in CalWIN. • From July 20, 2010 through July 31, 2010, new WTW/RES referrals or cases that require the scheduling/rescheduling of JCL shall be scheduled by MAXIMUS East Region WTW staff into PCG's activity slots for the East Region. • PCG shall utilize the Session Enrollment listing in CalWIN to manage cases assigned to JCL. • By July 23, 2010, the last JCL session must be facilitated and completed, with verification of participation hours documented by MAXIMUS East Region WTW staff. • The JCL session includes the classroom curriculum and Job Search activities (based on operational procedures). Job Search activities may be transferred to the new provider.
Work Experience Group Orientation (GRP)	<ul style="list-style-type: none"> • By July 15, 2010, PCG shall provide SPOS a listing of GRP activity sessions to begin the week of August 9, 2010 for the East Region. • By July 20, 2010, SPOS shall enter PCG's GRP activity sessions in CalWIN. • From July 20, 2010 through July 31, 2010 new WTW/RES referrals or cases that require the scheduling/rescheduling of GRP shall be scheduled by MAXIMUS East Region WTW staff into PCG's activity slots for the East Region. • PCG shall utilize the Session Enrollment listing in

	<p>CalWIN to manage cases assigned to GRP.</p> <ul style="list-style-type: none"> • By June 23, 2010, the last GRP session facilitated by MAXIMUS East Region WTW staff must be completed.
Ongoing WTW Activities	<ul style="list-style-type: none"> • All ongoing WTW activities shall be scheduled by MAXIMUS East Region WTW staff up to July 30, 2010, using current MAXIMUS' East Region Activity Sessions. • Ongoing WTW activities include: Full Time Employment (FTE), Part Time Employment (PTE), Self Employment (SLE), Vocational Education (VTR), Employment Related Training (ERT), Employment Related Education (ERE), etc. • By July 30, 2010, PCG shall set up sessions in CalWIN for the East Region for ongoing WTW activities to begin immediately following August 1, 2010. Refer to <u>How To #520 Set-up Employment Services Activity Slots</u>. • MAXIMUS East Region WTW staff is NOT to schedule Ongoing WTW Activities into PCG's activity sessions.
Ongoing/Active Cases	<p>Ongoing/Active cases of participant(s) in current WTW activities shall be processed by MAXIMUS East Region WTW staff to include:</p> <ul style="list-style-type: none"> • Documentation and verification of participation hours for June 2010; • By July 23, 2010, complete CalWIN entries to document participation hours; • By July 30, 2010, issue supportive services for August 2010.
Assessment and/or Reevaluation of WTW Activities	<p>Cases requiring an Assessment or a reevaluation of WTW activities shall be identified by MAXIMUS East Region WTW staff for immediate action by PCG. This includes participants not assigned to a current WTW activity.</p>
Work Participation Rate (WPR)	<ul style="list-style-type: none"> • WPR cases are to be treated as high priority and are to be cleared and processed by MAXIMUS East Region WTW staff as stated in CPG Section <u>10-001-B. Federal Work Participation Rate (WPR)</u>. • MAXIMUS East Region WTW staff shall complete WPR actions for the following WPR survey months: <ul style="list-style-type: none"> ○ May 2010 - Clear/process cases, attend the WPR lab on July 15, 2010 and complete WPR surveys. ○ June 2010 - Clear/process cases, engage participants in WTW activities, complete WPR Surveys and identify/flag cases for PCG transition. ○ July 2010 - Clear/process cases, engage participants in WTW activities, complete WPR Surveys and identify/flag cases for PCG transition. • PCG shall complete WPR actions for the following WPR survey months: <ul style="list-style-type: none"> ○ July 2010 - Clear/process cases, attend the WPR lab on August 26, 2010 and enter East region's

	WPR surveys into the E2Lite system.
Sanction	Cases in Sanction status shall be identified by MAXIMUS East Region WTW staff for immediate action by PCG.
Noncompliance	<ul style="list-style-type: none"> • Effective July 1, 2010, the initiation of the noncompliance process is on HOLD for all cases in transition to the new provider. This hold is ONLY for the month of July. • If a participant “no shows” for an activity in July 2010, MAXIMUS East Region WTW staff must reschedule the participant to the activity. The individual that “no showed” shall NOT have a “no show” status for the month of July. The Activity shall reflect a “Reschedule” status. • MAXIMUS East Region WTW staff shall to enter a Case Comment with the participant’s participation status. <ul style="list-style-type: none"> ○ Example: John Doe failed to attend scheduled Job Club on 7/5/10. Nonc on hold until 8/1/10, start of new WTW contract. Case identified and provided to new contractor for immediate action. • Cases shall be identified by MAXIMUS East Region WTW staff for immediate action by PCG. All efforts to engage non-compliant clients in participation and any subsequent noncompliance issues thereafter shall be initiated after August 1, 2010, as appropriate, by PCG.
Closed WTW/RES Cases	<ul style="list-style-type: none"> • WTW/RES cases that closed on June 30, 2010, shall be processed in accordance with established procedures by MAXIMUS East Region WTW staff. • WTW/RES cases that closed on July 30, 2010, shall be identified by MAXIMUS East Region WTW staff for immediate action by PCG. <ul style="list-style-type: none"> ○ PCG is to follow up and complete case closure procedures as appropriate. This is to ensure any cases that re-open on August 1, 2010, will be available to PCG for immediate case action. Refer to <u>How To #204 Close Employment Services Case</u>.
Case Transfers	<ul style="list-style-type: none"> • Effective April 26, 2010, all WTW/RES case transfers have been postponed until August 1, 2010. • If hardships for a participant are identified, and the WTW/RES case transfer is critical, region-to-region communication is required and the case transfer may be completed at the discretion of the regions.
Supportive Service Payments	<ul style="list-style-type: none"> • By July 30, 2010, MAXIMUS East Region WTW staff shall issue transportation and ancillary supportive services payments for all ongoing cases for the upcoming month. • After July 30, 2010, any supportive services payment requests received shall be forwarded immediately to PCG for immediate processing and payment.

Documentation	After July 23, 2010, documentation received by MAXIMUS East Region WTW staff shall be bundled by case number for immediate action by PCG.
AMPR/MPR Documentation	<ul style="list-style-type: none"> • By July 20, 2010, MAXIMUS East Region WTW staff shall submit the AMPR and supporting documentation for May 2010. • MAXIMUS East Region WTW staff shall box the last 3 years of AMPR/MPR documentation/verification and SPOS will coordinate with the region for pick up. AMPR/MPR documentation past 3 years shall be shredded. • By August 20, 2010, PCG shall submit East region's AMPR and supporting documentation for June 2010.
WEX Case Files	<ul style="list-style-type: none"> • MAXIMUS East Region WTW staff shall box the WEX provider and/or participant case files and SPOS will coordinate with the region for pick up.

Case Identification Procedures for Contractor Sites (WTW/RES)

MAXIMUS East Region WTW staff are to:

- Review their region's entire caseload;
- Identify cases that meet the Case Identification Criteria; and
- Complete required case actions.

SPOS shall coordinate the case reconciliation and boxing of cases. Once complete, MAXIMUS East Region WTW staff shall be required to serve WTW clients until July 30, 2010, utilizing the CalWIN system only, without the physical case folder.

Case Transfers (WTW/RES)

By July 23, 2010, MAXIMUS **East** Region WTW staff will perform a mass case transfer and place WTW/RES cases in the following Transition Caseload banks for Active Cases and Closed/Sanctioned Cases:

Region	Caseload #	Last Name	First Name	User ID
East CalWORKs	7AAA	7 Active	Temporary Bank	7active
	7CCS	7 Closed/Sanction	Temporary Bank	7closed
East Refugee	94AA	94 Active	Temporary Bank	94active
	94CS	94 Closed/Sanction	Temporary Bank	94closed

New Referral/Scheduling Bank Caseloads shall not be transferred and shall remain in the current caseload numbers.

On August 1, 2010, SPOS shall perform a mass case transfer of East Region's New Referral/Scheduling Bank Caseloads, Active Transition Caseload Bank and Closed/Sanctioned Transition Caseload Banks to PCG.

By August 31, 2010, PCG shall:

- Review East region's New Referral/Scheduling Bank Caseloads, Active

- Transition Caseload Bank and Closed/Sanctioned Transition Caseload Banks;
- Perform case transfer for all cases to a WTW case manager; and
- Generate and mail the Worker Change Letter (CSF59) to the participant.

**East Region
Caseloads
(WTW/RES)**

Effective August 1, 2010, PCG shall utilize the following naming conventions for the East Region Caseloads:

Region	Caseloads	Site
East Region 3	7A00 - WTW Scheduling Bank	133 West Main Street, 2 nd Floor El Cajon, CA 92020
	79XX - WTW Closed Bank	
	7EX0 - WTW Temporary Exemption Bank	
	9750 - Refugee Scheduling Bank	
	97XX - Refugee Closed Bank	
	Y700 - Child Care Scheduling Bank	
	Y7XX - Child Care Closed Bank	
	Y7P0 - Child Care Payment Scheduling Bank	
Y7PX - Child Care Payment Closed Bank		

CPG section 10-005-B. Overview of Eligibility Staff Responsibility has been updated with the new caseloads that are effective August 1, 2010.

**Refugee
Employment
Services**

Effective August 1, 2010, responsibility for providing Refugee Employment Case Management Services in the East Region shall be the responsibility of PCG, in accordance with the CalWORKs Program Guide and Refugee Employment Services Plan.

The Refugee Employment Services Plan is available at:
http://www.sdcounty.ca.gov/hhsa/programs/sd/documents/Refugee_Plan.pdf.

Note: The Refugee Employment Service Plan referenced above expires June 30, 2010. The new refugee plan has been approved by the County of San Diego Board of Supervisors and is pending State approval. Contractors shall operate utilizing the expired plan until further notice; SPOS shall provide the new plan to the contractors upon State approval.

**WTW
Referrals
HSS Actions**

Effective August 1, 2010, HSS shall refer WTW/RES the **East Region** referrals to the new Scheduling Bank caseloads noted below, based on the following zip codes:

REGION & PROVIDER	CASE #	ADDRESS	REGIONAL ZIP CODES			
East Region 3 PCG	7A00 - WTW Scheduling Bank	133 West Main Street, 2 nd Floor El Cajon, CA 92020	91901	91903	91905	91906
			91916	91917	91931	91934
			91935	91941	91942	91943
			91944	91945	91946	91948
	9750 - Refugee Scheduling Bank	7065 Broadway Lemon Grove, CA 91945	91962	91963	91976	91977
			91978	91979	91980	92019
			92020	92021	92022	92040
			92071	97072	92091	92149

Child Care Impact Effective August 1, 2010, Stage 1 Child Care Payment Services shall be provided through PCG in the East Region.

Quality Assurance Impact Quality Assurance will cite case accuracy errors should the procedures in this notice be incorrectly/not applied. Quality Assurance shall cite benefit errors should participants be incorrectly sanctioned or incorrectly aided based on the erroneous interpretations of this Special Notice.

Program Impact No impact to the Medical or Food Stamp programs.

Automation Impact No Impact.

Imaging Impact Effective September 1, 2010 East Region will be required to image all WTW/RES case information in the DoReS imaging system per the *Imaging Eligibility & Employment Operational Guide (EEOG)*.

Forms Impact No Impact.

Operations Impact No Impact.

ACCESS Impact ACCESS Call Agents may receive telephone calls from WTW/RES participants requesting contact information of their WTW/RES provider. Effective August 1, 2010, ACCESS Call Agents may provide the following contact information to WTW/RES participants:

Region/Site	Provider	Employment Services	Address	Main Phone Number
North Region North Coastal Site	Arbor E&T	<ul style="list-style-type: none">• WTW Case Management Services• RES Case Management Services• Child Care Payment Services	1310 Union Plaza Court Suite 200 Oceanside, CA 92054 Mail Stop - N105	760-696-9600
North Region North Inland Site	Arbor E&T	<ul style="list-style-type: none">• WTW Case Management Services• RES Case Management Services• Child Care Payment Services	463 North Midway Drive Suite 100A Escondido, CA 92027 Mail Stop - N88	760-871-1900
Central Region	Arbor E&T	<ul style="list-style-type: none">• WTW Case Management Services• RES Case Management Services• Child Care Payment Services	1750 5 th Avenue San Diego, CA 92101 Mail Stop - W69	619-321-1800
East	PCG	<ul style="list-style-type: none">• WTW Case	133 West Main Street,	888-752-8138

		<ul style="list-style-type: none"> Management Services • RES Case Management Services • Child Care Payment Services 	2 nd Floor El Cajon, CA 92020 Mail Stop - W454	(Toll Free)
East	PCG	<ul style="list-style-type: none"> • WTW Orientation • WTW Job Club 	7065 Broadway Lemon Grove, CA 91945 Mail Stop - W418	888-752-8138 (Toll Free)
South	MAXIMUS	<ul style="list-style-type: none"> • WTW Case Management Services • RES Case Management Services • Child Care Payment Services 	690 Oxford Street Chula Vista, CA 91911 Mail Stop - W297	619-409-4700 619-409-4800

**Assistant
Deputy
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