

CalWORKs PROGRAM GUIDE

Special Notice

10-07 ADDENDUM-B

Subject **TRANSITION OF CALWORKS WELFARE-TO-WORK AND REFUGEE EMPLOYMENT SERVICES CASE MANAGEMENT FOR SOUTH 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 16, 2010

Purpose This Special Notice pertains to the **South Region only**. 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 **South 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 **South Region**.
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Employment Service Locations

Effective August 16, 2010, the WTW/RES Case Management and Stage 1 Child Care provider for the South Region is Public Consulting Group (PCG).

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

Region	Provider	Services	Address	Main Phone Number
Region 4 South	PCG	<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	888-752-8139 (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 South Region, with the completion target date of August 13, 2010.
CalWIN System Access	Effective August 16, 2010, activities to change, add, and delete system access for staff shall be completed for

	PCG staff.
Mail Receipt and Delivery	<p>Interoffice County mail received for mail stops which have been deleted or changed will be automatically forwarded to the appropriate site by Mail Services.</p> <p>All sites receiving U.S. Mail after the transition period shall forward all incoming U.S. mail to the new provider as appropriate.</p>
Customer Notification of Transition	<p>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:</p> <ul style="list-style-type: none"> • Effective date of change; and • Address and phone number of the new office, as appropriate. <p>All regions are also required to leave voicemail messages on telephones that contain the new regional location, as appropriate, and effective date of change.</p>
Quality Assurance Reviews	<p>As of June 30, 2010, WTW/RES QA reviews shall be postponed temporarily for all Regions.</p> <p>WTW/RES QA reviews for South Region will resume in October 2010, for the August 2010 Monthly Progress Report (MPR) data month.</p>
Program Compliance/Data Validation Reviews	<p>In October 2010, WTW/RES Program Compliance and Data Validation reviews for the South region shall begin (3rd month of the 1st quarter).</p>
WTW Dark Week	<p>From August 9, 2010 through August 13, 2010, South region will be dark to allow for the transition of computer equipment from MAXIMUS to PCG.</p> <p>During the Dark Week, there will be no WTW activities and minimal services available to clients at the South Region.</p>

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 the MAXIMUS South Region WTW staff.

Case Identification Criteria (WTW/RES)

South 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 22, 2010, PCG shall provide SPOS a listing of ORE/APR activity sessions to begin the week of August 23, 2010 for the South Region.

	<ul style="list-style-type: none"> • By July 28, 2010, SPOS shall enter PCG's ORE/APR activity sessions in CalWIN. • From July 28, 2010 through August 13, 2010, new WTW/RES referrals or cases that require the scheduling/rescheduling of ORE/APR shall be scheduled by MAXIMUS South Region WTW staff into PCG's activity slots for the South Region. • PCG shall utilize the Session Enrollment listing in CalWIN to manage cases assigned to ORE/APR. • By August 6, 2010, the last ORE/APR sessions facilitated by MAXIMUS South Region WTW staff must be completed with WTW participants and entered in CalWIN.
Job Club (JCL)	<ul style="list-style-type: none"> • By July 22, 2010, PCG shall provide SPOS a listing of JCL activity sessions to begin the week of August 23, 2010 for the South Region. • By July 28, 2010, SPOS shall enter PCG's ORE/APR activity sessions in CalWIN. • From July 28, 2010 through August 13, 2010, new WTW/RES referrals or cases that require the scheduling/rescheduling of JCL shall be scheduled by MAXIMUS South Region WTW staff into PCG's activity slots for the South Region. • PCG shall utilize the Session Enrollment listing in CalWIN to manage cases assigned to JCL. • By August 6, 2010, the last JCL session must be facilitated and completed, with verification of participation hours documented by MAXIMUS South 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 22, 2010, PCG shall provide SPOS a listing of GRP activity sessions to begin the week of August 23, 2010 for the South Region. • By July 28, 2010, SPOS shall enter PCG's GRP activity sessions in CalWIN. • From July 28, 2010 through August 13, 2010, new WTW/RES referrals or cases that require the scheduling/rescheduling of GRP shall be scheduled by MAXIMUS South Region WTW staff into PCG's activity slots for the South Region.

	<ul style="list-style-type: none"> • PCG shall utilize the Session Enrollment listing in CalWIN to manage cases assigned to GRP. • By August 6, 2010, the last GRP session facilitated by MAXIMUS South Region WTW staff must be completed.
Ongoing WTW Activities	<ul style="list-style-type: none"> • All ongoing WTW activities shall be scheduled by MAXIMUS South Region WTW staff up to August 6, 2010, using MAXIMUS South Region WTW 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 August 13, 2010, PCG shall set up sessions in CalWIN for the South Region for ongoing WTW activities to begin immediately following August 16, 2010. Refer to <u>How To #520 Set-up Employment Services Activity Slots</u>. • MAXIMUS South 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 must be processed by MAXIMUS South Region WTW staff to include:</p> <ul style="list-style-type: none"> • Documentation and verification of participation hours for July 2010; • By August 6, 2010, complete CalWIN entries to document participation hours; • By August 6, 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 South 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 South Region WTW staff as stated in CPG Section <u>10-001-B. Federal Work Participation Rate (WPR)</u>. • MAXIMUS South Region WTW staff are to 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 to enter South region's WPR surveys into the E2Lite system.
Sanction	Cases in Sanction status shall be identified by MAXIMUS South 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 South region during the month of July and August. • If a participant "no shows" for an activity in July/August 2010, MAXIMUS South Region WTW staff shall reschedule the participant to the activity. The individual that "no showed" shall NOT have a "no show" status for the month of July/August. The Activity shall reflect a "Reschedule" status. • MAXIMUS South Region WTW staff shall 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 8/2/10. Nonc on hold until 9/1/10, start of new WTW contract. Case identified and provided to new contractor for immediate action. • Cases shall be identified by MAXIMUS South 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 September 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 South Region WTW staff. • WTW/RES cases that closed on July 30, 2010, shall be identified by MAXIMUS South 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 to the South region only have been postponed until August 16, 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. • Effective August 16, 2010, case transfer procedures shall resume for all WTW regions as outlined in CPG Section

	10-005-I. Case Transfer and Return.
Supportive Service Payments	<ul style="list-style-type: none"> • By August 6, 2010, MAXIMUS South Region WTW staff shall issue transportation and ancillary supportive services payments for all ongoing cases for the upcoming month. • After August 6, 2010, any supportive services payment requests received shall be forwarded immediately to PCG for immediate processing and payment.
Documentation	After August 6, 2010, documentation received by South Region shall be bundled by case number for immediate action by PCG.
AMPR/MPR Documentation	<ul style="list-style-type: none"> • By August 20, 2010, MAXIMUS South Region WTW staff is to submit the AMPR and supporting documentation for June 2010. • MAXIMUS South Region WTW staff is to 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 September 20, 2010, PCG shall submit South region's the AMPR and supporting documentation for July 2010.
WEX Case Files	<ul style="list-style-type: none"> • MAXIMUS South Region WTW staff is to 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 South Region WTW staff shall to:

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

SPOS shall coordinate the case reconciliation and boxing of cases. Once complete, current contractor staff shall be required to serve WTW clients until August 15, 2010, utilizing the CalWIN system only, without the physical case folder.

Case Transfers (WTW/RES)

By August 6, 2010, MAXIMUS South Region WTW staff shall 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
South	6AAA	6 Active	Temporary Bank	6active
	6CCS	6 Closed/Sanction	Temporary Bank	6closed

New Referral/Scheduling Bank Caseloads shall not be transferred and shall

remain in the current caseload numbers.

On August 13, 2010, SPOS shall perform a mass case transfer of South Region's New Referral/Scheduling Bank Caseloads, Active Transition Caseload Bank and Closed/Sanctioned Transition Caseload Banks to PCG.

By September 17, 2010, PCG shall:

- Review South 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.

South Region Caseloads (WTW/RES)

Effective August 16, 2010, PCG shall utilize the following naming conventions for the South region Caseloads:

Region	Caseloads	Site
South Region 4	6P00 - WTW Scheduling Bank 69XX - WTW Closed Bank 6EX0 - WTW Temporary Exemption Bank 9650 - Refugee Scheduling Bank 96XX - Refugee Closed Bank Y600 - Child Care Scheduling Bank Y6XX - Child Care Closed Bank Y6P0 - Child Care Payment Scheduling Bank Y6PX - Child Care Payment Closed Bank	690 Oxford Street Chula Vista, CA 91911 Mail Stop - W297

Refugee Employment Services

Effective August 16, 2010, responsibility for providing Refugee Employment Case Management Services in the South 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 16, 2010, HSS shall refer WTW/RES referrals to the **South Region** utilizing the new Scheduling Bank caseloads noted below, based on the following zip codes:

REGION & PROVIDER	CASE #	ADDRESS	REGIONAL ZIP CODES			
			91902	91908	91909	91910
South Region 4 PCG	6P00 - WTW Scheduling Bank	690 Oxford Street Chula Vista, CA 91911 Mail Stop - W297	91911	91912	91913	91914
			91915	91932	91933	91947
	9650 - Refugee Scheduling Bank		91950	91951	92010	92011

			92013	92118	92135	92143
			92147	92153	92154	92155
			92173	92178		

CPG section 10-005-B. Overview of Eligibility Staff Responsibility has been updated with the new caseloads that are effective August 16, 2010.

Child Care Impact

Effective August 16, 2010, Stage 1 Child Care Payment Services shall be provided by PCG in the South 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 17, 2010 South Region shall 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. 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 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)
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	PCG	<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	888-752-8139 (Toll Free)

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