

90-100.3. INTAKE

A. General

This section provides information on the GR Intake process.

B. Purpose

The Intake interview is the second step in the Intake process and is designed to accomplish the following objectives:

- determine that the applicant meets all eligibility requirements
- complete all necessary forms and documentation required to establish eligibility and complete the Intake process
- explain the rights, responsibilities, and requirements to the applicant including the right to a GR Hearing
- notify the applicant of any additional requirements that must be met before aid is continued beyond a specified period

All applications must be processed (approved/denied) within 30 days of the date of application. If the 30th day falls on a weekend or holiday, the application must be processed by the following business day. Applicants approved for an Expedited Intake must have an Intake interview within 3 business days of application (along with the CalFresh Expedited Services processing to the extent possible).

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C. General Interview Requirements

Intake workers must follow the actions in the table below for all GR Intake interviews.

Step	Action
1	Log in the case on the Intake Appointment Log.
2	Complete the Statement of Facts (CalWIN Statement of Facts or SAWS 2 Plus) and review the General Relief/CalFresh Orientation Form (11-73 HHSA) and Welcome Form (16-94 HHSA) for consistency and to be sure all questions are answered.
3	Clarify all unclear or inconsistent information with the applicant.
4	If the applicant has a pending SSI application or appeal on MEDS, refer the applicant to SSI Advocacy and Medi-Cal.

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General Interview Requirements
(continued)

Step	Action
5	Explain that if the applicant applies for and receives Supplemental Security Income/State Supplemental Payments (SSI/SSP) the first check will be sent to the Office of Revenue & Recovery (ORR) and any GR paid during this SSI/SSP eligible period will be deducted and the remainder will be sent to the applicant. Complete an Interim Assistance Reimbursement Authorization, SSP 14 and have the applicant sign and date it.
6	If there is a currently active case for another program in another FRC, review the case for consistency with the new application and statement of facts.
7	All homeless applicants will complete a form 11-44H HHSA, Affidavit of Homeless Living Situation, at Intake. Homeless recipients will be required to complete a form 11-44H HHSA at their next face-to-face interview. All recipients who become homeless while receiving GR will be required to complete form 11-44H HHSA during the month in which they report their homeless status.
8	Document all verifications provided and determine if additional items are needed to establish ongoing eligibility.
9	Explain to the applicant his/her rights and responsibilities, including an explanation of the Medi-Cal and CalFresh programs and regulations, if applicable. Advise the applicant that he/she may be categorically eligible to CalFresh benefits and provide the CalFresh application forms, if needed.
10	Have the applicant and sponsor, if applicable, read and sign form 11-19 HHSA (Lien Information), and form 11-22 HHSA (Grant of Lien) if the clearance does not indicate an active lien.
11	Evaluate if the client meets the criteria for Substance Abuse Services "reasonable suspicion." If yes, complete form 11-94 HHSA, Documentation of Reasonable Suspicion (file in case and fax a copy to the RRC), and provide the client form 11-89 HHSA GIN, Substance Abuse Services Informational Notice. Refer the applicant to an Orientation. The case will be approved, if otherwise eligible.

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D. Requirements for Able-Bodied Applicants

GR Intake workers must follow the actions in the table below for Able-Bodied (AB) applicants.

Step	Action
1	If the applicant has been employed within the past 30 days, contact the last employer to determine if there was Good Cause for leaving employment.
2	Explain employable program requirements of the Job Search (JS) and Job Training (JT).
3	If alternate job training has not been approved, refer the individual to the CalFresh E&T SW the next time that the CalFresh E&T SW is at the FRC (no more than 7 calendar days after the Intake or approval) for the Work Project (WP) assignment. If the approval is too late in the month for the CalFresh E&T SW to be able to assign a WP for the partial month assignment, or the applicant is a MAPC applicant, the Intake worker will schedule the MAPC Work Test or the partial month assignment and refer the individual to the CalFresh E&T SW for the ongoing assignments.
4	Explain the option of attending the Job Skills Session (JSS) and provide a copy of the JSS schedule sheet.
5	Go over form 11-49A HHSA, GR JT Requirements.
6	Go over form 11-49 HHSA, Employable Program Responsibilities and obtain the applicant's signature.
7	Attach a copy of the JSS sheet to the applicant's copy of the 11-49 HHSA.
8	Provide form 11-7 HHSA, Coversheet and GR Job Application Record, and CW 7 (if not provided at the Rights and Responsibilities Orientation).

GRPG Letter #65 (6/11)

E. Requirements for Non Able-Bodied

Intake workers must follow the actions in the table below for Non Able-Bodied applicants.

Step	Action
1	All applicants claiming to be unable to work or to have work restrictions are required to complete and sign the Applicant's Statement of Employability, 11-65 HHSA.

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E. Requirements for Non Able- Bodied (continued)

Step	Action						
2	<table border="1"> <thead> <tr> <th>If the applicant is...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>under a sanction or quit a job without Good Cause within the past 30 days,</td> <td>no aid is to be issued until verification of inability to work is received.</td> </tr> <tr> <td>not under a sanction,</td> <td>explain the requirements and provide verification forms as needed for verifying inability to work.</td> </tr> </tbody> </table>	If the applicant is...	Then...	under a sanction or quit a job without Good Cause within the past 30 days,	no aid is to be issued until verification of inability to work is received.	not under a sanction,	explain the requirements and provide verification forms as needed for verifying inability to work.
	If the applicant is...	Then...					
	under a sanction or quit a job without Good Cause within the past 30 days,	no aid is to be issued until verification of inability to work is received.					
not under a sanction,	explain the requirements and provide verification forms as needed for verifying inability to work.						
3	Follow the procedures in GRPG 90-250.2 for applicants who choose to have the County pay for the employability evaluation.						
4	<p>Give a Verification of Physical/Mental Incapacity – General Assistance (CSF 24) to applicants who choose to go to a private provider. The patient’s statement of medical condition and authorization for release sections are to be completed by the applicant during the pre-application interview.</p> <p>NOTE: Do not use black ink to complete this form. Use of colored ink will assist workers to identify forms which have been inappropriately photocopied.</p>						
5	Presume the applicant to be employable until verification of unemployability status is received unless the applicant meets the requirements for Administrative Unemployability.						
6	Provide form QR 7 (if not provided at the Rights and Responsibilities Orientation).						

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F. Expedited Intake Processing

Workers must follow the actions in the table below when processing an Expedited Intake.

Step	Action
1	Review the SAWS 1.
2	Conduct the Intake interview.

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Expedited Intake Processing (continued)

Step	Action
3	Verify the applicant's identity, and collect necessary verification.
4	Process the application as soon as all verifications are received.

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G. Expedited Intake Certification Periods

The appropriate certification period based on AB, EL, or IP/IAP eligibility will be used when approving the application after the Expedited Intake.

GRPG Letter 73 (1/14)

H. Failure to Appear

If the applicant fails to appear for the Intake interview, the application must be denied. A NOA must be mailed to the applicant.

If the applicant contacts the FRC ...	Then the worker must ...
within the 30-day application processing timeframe,	reschedule the Intake interview.
after the 30-day application processing timeframe,	inform the applicant that the denial will stand and he/she must reapply.

GRPG Letter 73 (1/14)

I. Pending Verifications for Normal Processing

If the applicant does not provide all required verifications requested by the pre-application worker by the end of the intake day, or new information was discovered during the Intake interview which requires verification, the worker will leave the GR case in pending status. A request for the pending verifications will be provided to allow the applicant 10 days to provide the verification.

If the verifications have not been provided by the 10-day deadline, the application will be denied. However, if the applicant informs the worker that additional time is needed, an extension will be allowed to they date the applicant expects to be able to provide the verification.

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**J.
Pending for
Outstanding
Warrants**

Any case with an individual with an outstanding misdemeanor warrant will be pended to allow the applicant additional time to clear the warrant and provide proof. This does not apply to fugitive felons, convicted drug felons, or probation/parole violators.

GRPG Letter 73 (1/14)

**K.
Drug
Addiction
and/or
Alcoholism**

Public Law 104-121 prohibits Social Security and SSI disability benefits and Medicaid and Medicare coverage to people who are disabled because of drug addiction and/or alcoholism (DA&A).

A diagnosis of DA&A means that drug addiction or alcoholism is a contributing factor material to the finding of disability and that the individual would not be found disabled if the person discontinued using drugs or alcohol. The intent of this provision is to establish barriers to using cash benefits to support an addiction. Persons receiving disability benefits based on DA&A had their cash benefits and health coverage terminated on January 1, 1997.

**L.
SSI Denial
Actions**

For individuals whose Social Security or SSI application was denied on or after March 29, 1996, the worker will take the actions in the table below.

Step	Action
1	Evaluate the GR application and determine if DA&A could have been the cause.
2	Request the applicant to provide verification of the reason the SSA application was denied.
3	Clear CalWIN to determine if the applicant had a Medi-Cal case denied for no disability.
4	Review the imaging system for a copy of Form MC 221 from the Medi-Cal worker, if so and if possible, otherwise document in Case Comments.
5	Enter a Case Comment regarding the SSI Denial for DA&A.
6	Request the individual to reapply for Social Security or SSI at the next redetermination.

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**M.
SSI
Terminated
Actions**

For individuals whose Social Security or SSI benefits were terminated effective January 1, 1997, the worker will take the actions in the table below.

Step	Action
1	Clear CalWIN to determine if the applicant had a Medi-Cal case denied for no disability.
2	Review the imaging system for a copy of Form MC 221 from the Medi-Cal worker, if so and if possible, otherwise document in Case Comments.
3	Request the applicant/recipient to provide verification of the reason only if there was not a Medi-Cal case denied.
4	Inform the applicant/recipient to reapply or appeal the SSA determination if DA&A is the reason.
5	Refer the applicant/recipient to the SSI Advocate if assistance is requested or required under GRPG 90-800 .
6	Request verification of the re-application or appeal.
7	Enter a Case Comment regarding the above actions.
8	Request the individual to reapply for Social Security or SSI at the next redetermination.

**N.
Granting**

Intake workers must follow the actions in the table below when granting a GR case.

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Granting (continued)

Step	Action
1	<p>Approval by the supervisor is required prior to granting aid. In addition, aid shall not be authorized until all information necessary for the determination of eligibility has been provided, with the following exceptions:</p> <ul style="list-style-type: none"> • The applicant can prove that an attempt was made to acquire the verification, and failure to do so was beyond his/her control. <p>Example: If a State Disability Insurance (SDI) application is required, and the client does not have the funds to pay to have the forms completed, the case may be granted pending the SDI application. The applicant is to be instructed to obtain the verification with the aid payment. If the verification is not provided, the case will be discontinued. (A UIB denial for medical restrictions is not acceptable verification of an SDI application completion).</p> <ul style="list-style-type: none"> • All eligibility factors, except proof of unemployability, have been met. Refer to GRPG 90-250.5 for procedures on applicants with medical evidence pending.
2	Complete a NOA/Budget Worksheet to determine the correct aid to be issued.
3	Identify on the NOA all follow-up verifications that must be provided and the deadline for their return (for example, SDI/UIB, Social Security card, employability evaluations, Veterans Benefits, etc.). Refer to appropriate PG sections for timeframes on pending verifications.
4	Complete all other required forms to initiate aid and to complete the interview.
5	Notify the companion case worker of the granting, if appropriate, and document notification in the case file.
6	Log the case out on the Intake Appointment Log.
7	Complete Case Comments, filing, etc.
8	Clear MEDS two State business days after granting to ensure that the GR case is on MEDS and that the SSN is verified.

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90-100.3. INTAKE, Continued

Granting (continued)

Step	Action
9	Transfer the case to the appropriate FRC after approval by the supervisor.

GRPG Letter #61 (7/10)

O. CMH Clients Being Released to Independent Living

Intake workers must follow the actions in the table below for CMH clients being released to Independent Living.

Step	Action
1	Complete the determination of eligibility for the applicant.
2	The CMH discharge planner and the applicant know that a grant may not be issued until the date of release by CMH and move-in to the independent living situation.
3	If the applicant will not be eligible, issue a denial NOA.
4	If the applicant will be eligible, inform him/her of that fact and call the discharge planner of when the applicant may come into the FRC for the issuance of the first benefits.
5	Explain the option of vendor payment, if appropriate.

P. Denials

Intake workers must follow the actions in the table below when denying a GR application.

Step	Action
1	Denials must clearly distinguish ineligibility from withdrawals.
2	If the applicant is ineligible or withdraws, the worker must: <ul style="list-style-type: none">• Advise the applicant of all reasons for the denial• Advise the applicant of the right to a GR Hearing• Complete and mail a NOA
3	Log the case out on the Intake Appointment Log.
4	Complete entries on the Intake Worker Log.
5	Complete the Case Comments, imaging, etc.

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