

3. Scheduling Process

3.1 New CalWORKs Applicants

CalWORKs applicants are registered for employment services through the CalWIN system after they are approved for cash assistance. Once registered, the client is scheduled by CalWORKs Employment Services (CWES) to attend an intake orientation. A separate scheduling process exists for teens.

3.1.1 Scheduling Process

The following table outlines the process for scheduling new CalWORKs applicants to CWES for employment services if there is no assigned worker.

Case management are responsible for scheduling mixed language and second parent one-on-one orientations.

This scheduling process is used by the following CWES offices:

- CWES - Central San Jose
- CWES - North County
- CWES - South County.

STEP	ACTION
1.	CalWORKs applicants are determined to be eligible for cash benefits by the Eligibility Intake Worker.
2.	Upon determining eligibility for cash benefits, the applicant is referred to CWES as a mandatory or volunteer registrant and is registered for employment services through the CalWIN system.
3.	A WAX list is generated through Business Objects Info View, that lists all CalWORKs mandatory and voluntary registrants who are required to participate in CWES or who volunteer.
4.	The Admin. Lead (or designee) creates a master orientation calendar each month. This calendar reflects days, times, and language for orientation.
5.	Clerical staff generate orientation sessions in CalWIN according to the master orientation calendar.
6.	The scheduling clerk schedules each client into a session and mails the orientation appointment letter and CWES Guidebook to the client.
7.	Clients who attend the scheduled orientation session are assigned to a CWES Intake Employment Counselor (EC) who conducts the appraisal interview, administers the Learning Disabilities screening, assigns the activity(ies), and supportive services.
8.	Clients who fail to attend the scheduled orientation are issued a notice of action NA 840 or NA 845 with a new appointment to attend orientation and the 20-day conciliation process begins by the orientation officer.

**Note:**

Clients who are identified as refugees and have been a U.S. resident less than five years are sorted and referred to CIU regardless of their education level.

3.1.2 Scheduling Rosters

CalWIN-generated session rosters are used to check-in clients when the individual was scheduled through CalWIN. Clients who walk-in to orientation will be added to the “Orientation Roster” (SCD 2271) by intake’s designated clerical person. These sign-in sheets are used as tools by orientation facilitators and administrative EC’s for identifying and tracking cases.

3.2 TCVAP

Trafficking and Crime Victims Assistance Program (TCVAP) participants must also participate in WTW activities to the same extent as other participants. However, if they are not work authorized because of their immigration status, job search activities are not required. These individuals are not required to have social security numbers. Activities that will assist the recipient to prepare for future employment, such as English as a Second Language (ESL) and job skills development related activities, may be appropriate.

**Note:**

Eligibility Workers approve this population using the new “R1” aid code.

3.3 Exempt to Non-exempt

A client whose status changes from exempt to non-exempt is required to participate in CWES. When the client is no longer exempt, the EW will run exemptions and the CalWIN system will automatically register the client with CWES for employment services.

3.4 Scheduling Clients for Group Orientation

Existing clients will be referred back to the group orientation when:

- Exemption expires after 30 days
- Break in Aid over 30 days

- Post-Aid services ends and client comes back on cash aid.

CalWORKs recipients who are not able to attend a group orientation may request an individual orientation.

3.4.1 Process for San Jose Central

Who	Step
Closing Supervisor or Lead	<ul style="list-style-type: none"> • Reviews the case. • Transfers the case to caseload # A9ZR. Note: Administrative Services Unit will change to A9Z0.
OMC	<ul style="list-style-type: none"> • Reviews A9ZR and A9Z0 list through Case Assignment View Cases window in CalWIN. • Provides list to scheduling clerk.
Scheduling Clerk	Schedules each client into a session and mails the orientation appointment letter and CWES Guidebook to the client.

3.4.2 Process for North County

Who	Step
Supervisor or Lead	<ul style="list-style-type: none"> • Reviews the case. • Transfers the case to caseload # N100.
Designee	<ul style="list-style-type: none"> • Reviews the list through Case Assignment View Cases window in CalWIN. • Reviews the WAX -N100 list • Provides the list to scheduling clerk.
Scheduling Clerk	Schedules each client into a session and mails the orientation appointment letter and CWES Guidebook to the client.

3.4.3 Process for South County

Who	Step
Closing Supervisor or Lead	<ul style="list-style-type: none"> • Reviews the case. • Transfers the case to caseload # DLJ0. • The DITF 13 listing identifies cases in the DLJ0 caseload that have come back on aid. These cases are assigned to the S100 caseload, Pending Orientation. The South County S100 caseload should be differentiated from the South County WAX list also titled S100.
Designee	<ul style="list-style-type: none"> • Reviews DLJ0 and S100 list through Case Assignment View Cases window in CalWIN • Provides list to scheduling clerk
Designee	Schedules each client into a session and mails the orientation appointment letter and CWES Guidebook to the client.

3.5 Individual Orientations

CalWORKs recipients who are unable to attend a group orientation may request an individual orientation. Requests for individual orientations are reviewed on a case-by-case basis for individuals who are employed, attending school, are DV-Exempt and request supportive services, or have other scheduling needs.

[Refer to “Outlook Calendar Instructions,” page 4-3]

To facilitate the scheduling and orientation process between various Intake Units at 1879 Senter Rd, the following procedures must be followed by 1879 Senter Rd CWES staff when a CalWORKs recipient requests an individual intake:

Who	Action									
A9G EC	Screen client for an individual orientation									
	If the client is...	Then the EC								
	Able to attend a group Orientation,	<ul style="list-style-type: none"> Refers the client to next available group orientation 								
	Not able to attend group orientation,	<ul style="list-style-type: none"> Obtains current verification indicating the client is unable to attend a group orientation such as SCD 549A, check stubs, appropriate CalWIN windows, verification from IDM, School Schedule, Domestic Abuse Participation Status (SCD 1554). <p>Note:</p> <p>Ensure the work schedule is completed on the SCD 549A.</p> <ul style="list-style-type: none"> Identifies needed supportive service. Changes worker number in CalWIN. Completes "Individual Intake Request" (SCD 2272). Submits employment/school/Domestic Abuse verification to IDM. Sends an email to EW and document Case Comments. Ends non-compliance with Good Cause, only if FTE verified and client is non-compliant. Ends orientation activity status, only if FTE verified as follows: <table border="1" data-bbox="706 1024 1122 1304"> <thead> <tr> <th data-bbox="706 1024 1122 1077">If Status is...</th> <th data-bbox="1122 1024 1539 1077">Then end with...</th> </tr> </thead> <tbody> <tr> <td data-bbox="706 1077 1122 1129">"Scheduled"</td> <td data-bbox="1122 1077 1539 1129">"Disenroll"</td> </tr> <tr> <td data-bbox="706 1129 1122 1213">"No Show"</td> <td data-bbox="1122 1129 1539 1213"> <ul style="list-style-type: none"> "Other" "End Before Expected" </td> </tr> <tr> <td data-bbox="706 1213 1122 1304">"Non-Compliant"</td> <td data-bbox="1122 1213 1539 1304"> <ul style="list-style-type: none"> "Other" "End Before Expected" </td> </tr> </tbody> </table>	If Status is...	Then end with...	"Scheduled"	"Disenroll"	"No Show"	<ul style="list-style-type: none"> "Other" "End Before Expected" 	"Non-Compliant"	<ul style="list-style-type: none"> "Other" "End Before Expected"
	If Status is...	Then end with...								
	"Scheduled"	"Disenroll"								
	"No Show"	<ul style="list-style-type: none"> "Other" "End Before Expected" 								
	"Non-Compliant"	<ul style="list-style-type: none"> "Other" "End Before Expected" 								
	<ul style="list-style-type: none"> If the 2nd parent is scheduled or is non-compliant, end non-compliance manager with Good Cause and end orientation activity status only if 1st parent is FTE verified as follows: <table border="1" data-bbox="706 1419 1122 1692"> <thead> <tr> <th data-bbox="706 1419 1122 1472">If Status is...</th> <th data-bbox="1122 1419 1539 1472">Then end with...</th> </tr> </thead> <tbody> <tr> <td data-bbox="706 1472 1122 1524">"Scheduled"</td> <td data-bbox="1122 1472 1539 1524">"Disenroll"</td> </tr> <tr> <td data-bbox="706 1524 1122 1608">"No Show"</td> <td data-bbox="1122 1524 1539 1608"> <ul style="list-style-type: none"> "Other" "End Before Expected" </td> </tr> <tr> <td data-bbox="706 1608 1122 1692">"Non-Compliant"</td> <td data-bbox="1122 1608 1539 1692"> <ul style="list-style-type: none"> "Other" "End Before Expected" </td> </tr> </tbody> </table>		If Status is...	Then end with...	"Scheduled"	"Disenroll"	"No Show"	<ul style="list-style-type: none"> "Other" "End Before Expected" 	"Non-Compliant"	<ul style="list-style-type: none"> "Other" "End Before Expected"
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"Scheduled"	"Disenroll"									
"No Show"	<ul style="list-style-type: none"> "Other" "End Before Expected" 									
"Non-Compliant"	<ul style="list-style-type: none"> "Other" "End Before Expected" 									
<ul style="list-style-type: none"> Email the Individual Intake Request to A9G Lead 										

Who	Action	
A9G Lead	Reviews the SCD 2272	
	If the SCD 2272...	Then the Lead...
	Approved,	Send an Email with SCD 2272 attached to designated Intake CST, Intake Sups/Leads
Not Approved,	Refers the SCD 2272 back to the A9G Worker.	
Intake CST (Only for FTE)	<ul style="list-style-type: none"> • Assigns the case to the Intake Worker. • Sends an email and attachment to "Reply to All" and assigned EC regarding the case assignment. • Adds a case count to the Weekly Assignment Control Log. • Files the SCD 2272 in the Orientation Roster Log Binder. 	
A9G EC (Only for FTE)	<ul style="list-style-type: none"> • Delivers the Intake Unit communication form (Pink form) upon notification of the case assignment. • Attaches a copy of the Inquire on Case Information screen shot window and deliver to designated Intake CST. 	
Intake CST (Only for FTE)	<ul style="list-style-type: none"> • Changes the worker number in CalWIN to the assigned Intake Worker. • Delivers the pink form with screen shot window attached to the assigned Intake Worker. 	
A9H Sup/Lead (SIP/PTE/DV/Other)	<ul style="list-style-type: none"> • Assign individual intake request on a rotation basis & language needs. • Send email and attachments to "Reply to All" and to assigned EC regarding assignment. • Records the information on the Individual Case Assignment Log located on the (S:) Drive. 	
Intake EC	Review case in CalWIN, IDM, and CDS Archive	

Who	Action		
	If the case is...	Then...	
	FTE	<ul style="list-style-type: none"> • Verifies employment. • Mails the “Employed Letter” (SCD 325) and Intake Packet. • Allows the client 10 working days to provide Intake Packet and required child care information and verification. • Updates the [Employment Detail] tabs in CalWIN. • Assigns, schedules and updates the FTE activity outside the plan using the date of the first contact made per SCD 2272. • Assigns Supportive Services for 3 months from the first contact made or employment start date, if employed. • Completes the “APP/CWES Referral & Communication Referral” (SCD 1776), if childcare approved. • Assigns, schedules, and updates Orientation and Appraisal activities, if orientation completed or Intake Packet returned using the date the client signed the WTW 1 and WTW 2. <p>Note: The FTE, orientation, WTW 1 and WTW 2 are not required unless the client is sanctioned or requesting services beyond child care, transportation, and ancillary. However, if the client completes an orientation the WTW 1 and WTW 2 must be completed.</p>	
	SIP/PTE/DV/Other	Schedules the client for an individual orientation using the WTW 9.	
		If the client...	Then the Intake EC...
	Attends an individual Orientation,	<ul style="list-style-type: none"> • Completes the Orientation/Appraisal process. • Complete Orientation Sign-In sheet. (ensure to note activity and if client is sanctioned) • Submit the “Orientation Roster” (SCD 2271) and SCD 2272 to the unit Supervisor. 	
	Fails to attend the Individual Orientation,	<ul style="list-style-type: none"> • Send an email to “Reply to All” notifying A9G Worker. 	

Who	Action	
A9H Sup/Lead (SIP/PTE/DV/Other)	<ul style="list-style-type: none"> Signs and dates the Orientation Sign-In Sheet and Individual Intake Request form Updates the [Registration Tab] to “Curing Sanction” status, if sanctioned Submits the original copy to the Intake CST for case count, A9G work for delivery of pink form and assigned EC. 	
A9G Worker (SIP/PTE/DV/Other)	If the client...	Then the Worker...
	Fails to attend	<ul style="list-style-type: none"> Requests a sanction, if the client was non-compliant. Delivers the pink form with copy of the Inquire on Case information window to Intake CST.
	Client attends orientation	<ul style="list-style-type: none"> Deliver pink form with copy of the Inquire on Case Information window to Intake CST
Designated CST (SIP/PTE/DV/Other)	<ul style="list-style-type: none"> Adds a case count to the Weekly Case Assignment Control Log. Changes the worker number to the assigned Intake EC. Delivers the pink form to assigned Intake EC. 	

3.6 Immediate and Continuous Child Care

3.6.1 Prior to Mandating Program Activities

The EC is to verify that the parent has secured child care prior to mandating WTW participation, and prior to initiating the noncompliance process or imposing a sanction. Securing child care is defined as the child care packet received. The following applies to newly approved applicants and recipients:

STEP	WHEN...	Who...	ACTION...
1.	Newly Registered Recipients on DSR 67575 daily report	Scheduling Clerical Staff	<ul style="list-style-type: none"> Follows existing scheduling workflow and schedules clients within 5 business days.
2.	Newly Approved Cal-WORKs Applicants listing generated daily	Engagement Lead	<ul style="list-style-type: none"> Distributes Newly Approved Applicants and Recipients cases to the Engagement Team the same day ORE cases are assigned in CalWIN. <p>Note: Sanction Applicants will be assigned Round Robin, Engagement EC will follow the WTW Sanction Client workflow.</p>

<p>3.</p>	<p>Cases in both listing above</p>	<p>Engagement EC</p>	<p>Newly Approved Applicants...</p> <p><u>Reviews for the following:</u></p> <ul style="list-style-type: none"> • If the client receives APP childcare or declines childcare: <ul style="list-style-type: none"> • CCP 8 is not sent; no need to approve childcare in CalWIN • Enters case comments in CalWIN. • No further action needed, follow existing orientation business process. <p><u>Childcare needed-proceed:</u></p> <ul style="list-style-type: none"> • If needed, change WTW Employment Registration Status date to match CalWORKs beginning date of aid. • Approve Full-Time childcare for 12 months (example: 1/1/20-12/31/20) in CalWIN under “Stage One Childcare” activity. <ul style="list-style-type: none"> • Leave activity in <i>Referred</i> status. • Send “CalWORKs Stage One Childcare Authorization” (CCP 8). <ul style="list-style-type: none"> • Complete form with household children composition, assigned Engagement EC contact information and 30-day due date. • CCP 8: 30-day due date time frame <u>for childcare to be secured</u> begins the date CCP 8 is mailed. • Sends copy of CCP 8 to IDM. • Enters case comments in CalWIN using “Stage One 12-Month Childcare” drop-down in the Maintain Case Comments window. • Sets alert to follow up 15-days from date CCP 8 was mailed. <p><u>Newly Registered Recipients:</u></p> <ul style="list-style-type: none"> • Follow the same steps as above except for the Employment status date, which should be the effective begin date the client became <u>WTW Mandatory</u>. <p>Note: If at any point the client requests to reschedule ORE the EC is to follow existing business process and provide ORE dates, times and locations. The appropriate Childcare packet will be mailed by the Engagement EC at any time during client interaction.</p>
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4.	At 15th day	Engagement EC	IF...	THEN...
			Complete CCP 8 and child-care packet is received,	<ul style="list-style-type: none"> Updates "Stage One Childcare" activity with actual childcare provider PID#. Approves Full-Time childcare in CalWIN. Updates activity with "Active" Status. Sends out CalWIN generated NA832. <p>Note: If no PID#, follow existing childcare business process.</p> <ul style="list-style-type: none"> Documents case action under Stage One 12-Month Childcare drop-down in the Maintain Case Comments window.
			Client Shows to ORE within 15 days,	<ul style="list-style-type: none"> EC clears and delivers the case for CM EC assignment.
			At 15 days does not show to ORE,	EC contacts the client to confirm whether childcare has been secured.
				IF and THEN...
				Not Secured.... ...Provides 4Cs information
				Secured... ...Requests client to provide completed CCP 8 & Childcare packet.
				Client misplaces the CCP8... ...Prints a copy from IDM and resends with the original 30th day due date.
	<ul style="list-style-type: none"> Reschedules ORE after the 30th day from date the CCP 8 was mailed. 			
5.	Client shows to 2nd ORE appt.	Engagement EC	<ul style="list-style-type: none"> Clears and delivers case for CM EC assignment. 	

6.	Client does not show to 2nd ORE appt and it is after the CCP 8 30th day due date	Engagement EC	<ul style="list-style-type: none"> Will follow the existing Non-Compliance business process and initiate Non-Compliance. 	
			If...	THEN...
			Completes CCP 8 and child-care packet is received during NONC time frame,	Approves childcare regardless of client's attendance, following approval procedure in Step #4.
7.	No client contact by the end of the NONC timeline	Engagement EPS/Lead	<ul style="list-style-type: none"> Implements WTW Sanction. 	
8.	Sanction is implemented	Engagement EC	<ul style="list-style-type: none"> Moves WTW case to close files once the EW authorizes the WTW sanction. 	

