

12. Employment Connection

12.1 Background

With the implementation of Assembly Bill (AB) 74 in July 2013 and AB 1603 in February 2017, additional funding was provided to counties to expand their current subsidized employment (SE) programs. The goal of AB 74 and AB 1603 is to increase engagement and participation of program participants through expansion of subsidized employment.

Subsidized employment is the Welfare-to-Work (WTW) activity that allows a client to earn wages while developing marketable job skills and work experience for a limited period of time. The goal of subsidized employment is to enhance the client's employability to transition to a full-time, higher paying position that will lead to self sufficiency. Employers who hire clients into subsidized employment positions are reimbursed for wages earned by the client.

In October 2013, Santa Clara County expanded its subsidized employment services program, [[Refer to "Transitional Subsidized Employment \(TSE\)," page 12-56](#)]. Employment Connection is administered and promoted through the county's CalWORKs Employment Services (CWES) Program. TSE is primarily used by the Rapid Response Team (RRT).

The expanded subsidized employment program includes full-time and part-time subsidized employment, job development, job placement and retention services. It also provides job placement to individuals (Safety Net) who have timed-out from their CalWORKs 48-month Time on Aid limit whose family members are still aided. Employment Connection increases the number of clients that can be served and provides for a longer period of employment retention support.

12.2 Employment Connection Center (ECC) Overview

The Employment Connection is the venue in which the WTW activities of Job Supervised Job Search (SJS) and Part Time Job Search (PTJS) are provided. The Employment Connection facilitates these activities by providing job readiness, job development and job placement and job retention services. Services are provided by a staff of Employment Counselors (ECs) in partnership with a network of employers and other service providers.

Employment Connection centers makes available a wide array of equipment and services that support the participants' job search. The centers include computer labs, fax machines, phones, and copier services. Additional information on job search, resource publications, and job postings are made available to job seekers. The ECC sponsors on site hiring events on a recurring basis. Professional development workshops on job retention and career planning are also offered.

Employment Connection promotes both unsubsidized and subsidized employment. Unsubsidized employment is defined as a position in which an employer pays the wages directly to the client and the employer is not reimbursed for wages. Subsidized employment is defined as on the job training in which an employer pays the wages earned directly to the client. The employer wages are then reimbursed by the county.

Unsubsidized and subsidized employment positions are developed in a wide array of industries. Employers interested in wage subsidies are required to enter into a subsidized employment agreement with the county. Unsubsidized employment positions are direct referrals to employers who interview and/or hire clients for positions with no subsidy.

Approved and participating employers in subsidized employment, interview, hire and train clients selected to participate. Employers agree to pay wages and provide training for a specified period of time in exchange for work performed by clients. The county reimburses the employer for wages earned by the client. The goal is that upon completion of the subsidy period, employers continue to employ clients without any wage reimbursement (unsubsidized employment).

Subsidized employment positions may range from 3 to 6 months in duration and are either part-time or full-time. The hourly wage must be equivalent to or higher than the City of San Jose minimum wage ordinance.

Suitable and job ready clients assigned to the activities of JC, SJS or PTJS are referred to both subsidized and unsubsidized employment positions. Adult Education or Community College service providers may also refer clients.

A new Welfare-to-Work (WTW) plan must be signed when a client enters into subsidized or unsubsidized employment from JC, SJS, or PTJS.

12.2.1 Employer Relations (ER) Unit

The ER unit is responsible for job development of subsidized and unsubsidized positions, job recruitments, job fairs, and other events/projects. They design and create marketing material and strategies for advertisement and marketing methods. They attend business networking events and build relationships with businesses to increase job opportunities for clients. The ER unit is the point of contact for ecstaffing.com updates and redesign. The goal of the unit is to link job seekers to employers who are interested in interviewing and/or hiring clients who are job ready. Employer Relations Specialist (ERS) EC staff develop working relationships with local employers and informs them of recruitments, job advertisements, job referrals, assignments and hiring process, to match job seekers to employers seeking to fill positions and provide employer feedback to assigned EC staff through debriefs. The ERS establishes lasting relationships with employers by having ongoing communication with both subsidized and unsubsidized employers. The ER unit is also responsible for developing subsidized employment opportunities with employers who are interested in wage subsidies. ERS EC staff introduces, explains and executes County Subsidized Employment Agreements with employers and provides an overview of program requirements. The ER unit collaborates with JPR EC staff to develop positions in alignment with client profiles.

12.2.2 Job Placement and Retention (JPR) Units

The JPR units train and facilitate job readiness workshops that prepare clients on how to conduct an effective job search, interviewing techniques, how to properly apply for positions and how to secure and maintain employment. The JPR units obtain, verify and complete all right-to-work and employment related (I-9, W4, DE4, etc.) documentation for subsidized employment. Staff will match the client's interests, abilities and experience to available subsidized and unsubsidized employment positions. Once the client accepts a job offer, the scheduled start date is confirmed and the subsidized or unsubsidized employment activity begins.

The JPR units also have the responsibility to support the employers and clients participating in subsidized employment. Clients are supported to retain employment through the subsidy period, with the goal of helping to obtain unsubsidized employment with the current employer or another employer. The units have the responsibility to ensure subsidized employers and worksite supervisors are in compliance with the worksite agreement, and assist in conflict resolution between the client, employer and/or program requirements.

The JPR EC and Case Management (CM) Retention EC continue to support and work closely with clients during the subsidized and unsubsidized employment periods.

12.2.3 Subsidized Employment Administrative Payroll Unit (APU)

The APU supports the subsidized employment program by processing all employment documents required to make payments to employers and clients. The unit processes all incoming wage reimbursement invoices received from employers. The unit also processes time cards for clients participating in paid work experience and provides the employer with any needed technical assistance. The unit works in coordination with Financial Management Services (FMS) and maintains all files and documents required for subsidized employment program operation.

12.2.4 Case Management (CM) Retention EC

The CM Retention EC is a specialized worker assigned to the case once the client is placed in subsidized employment. This worker is responsible to monitor, track and provide employment retention services in partnership with the JPR unit.

The goal is for the CM Retention EC to provide support services and any other resource referrals that will ensure the continuity of employment during the subsidized activity and the 90-day unsubsidized employment period. These efforts will continue regardless if the client is discontinued from cash aid due to subsidized or unsubsidized employment.

The case will remain with the CM Retention EC throughout the subsidized period and 90-day unsubsidized periods.



Note:

The Family Stabilization (FS) Unit will continue to manage cases with FS clients. FS cases will not be transferred to a CM Retention EC when a FS client is placed in subsidized employment. The FS and CM Retention supervisors coordinate between the assigned FS and CM Retention case managers in order to provide comprehensive services to the FS client. The CM Retention EC will coordinate subsidized employment support services with the FS EC and the client.

12.2.5 EC Works Tiers

Note: There is a 12 month maximum on subsidized employment placement across any combination of tiers (Tier I, Tier II and/or Tier III). **One day attended in the month counts as one month used.**

The table below provides a general overview of the different subsidized employment tiers available through EC Works:

| Tier | Description |
|--------------------------------|---|
| Tier I - Subsidized Employment | <ol style="list-style-type: none"> 1. For eligible active CWES clients, and Safety Net individuals who have timed-out from their CalWORKs 48-month time on aid limit. 2. Up to 40 hours per week. 3. Private sector (“For Profit”) and Public or non-profit organizations. 4. Employer pays wages directly to client. 5. Employer can be reimbursed in part or in whole for wages earned by client. 6. Hourly wage must be equivalent to or higher than the City of San Jose minimum wage ordinance. 7. Positions are 3 to 6 months in length. Note: One day attended in the month counts as one month used. 8. Earnings are non-exempt. 9. Employment verification form is “Request for Employment Information (SCD 549A), or “Schedule A” (SCD 2466). |

| Tier | Description |
|------------------------------------|--|
| Tier II - Paid WEX | <ol style="list-style-type: none"> 1. For eligible active CWES clients. 2. Limited to 20 hours per week. 3. Public or non-profit organizations. 4. Santa Clara County is the employer of record and pays wages directly to client. 5. Hourly wage must be equivalent to or higher than the City of San Jose minimum wage ordinance. 6. Positions are up to 6 months in length. Note: One day attended in the month counts as one month used. 7. Earnings are non-exempt. 8. Request for Employment Information form is SCD 549A or "Schedule A" (SCD 2466). |
| Tier III - Sub. College Work Study | <ol style="list-style-type: none"> 1. For eligible CWES clients enrolled at a participating community college. 2. Hours per week based on approved "Schedule A" (SCD 2466). 3. Length of positions are determined by community college, not to exceed 12 months. The 12 months maximum includes any previous months in Tier I and/or Tier II assignments. Note: One day attended in the month counts as one month used. 4. Community college is employer of record, determines wages and pays client directly. 5. All Sub. College Work Study earnings are exempt. 6. Request for Employment Information form is (SCD 549A) or "Schedule A" (SCD 2466). Note: Not all work study positions at participating community colleges will be funded by expanded subsidized employment. The community college liaison will only submit a "Schedule A" (SCD 2466) to the assigned EC if the payment is subsidized and approved by the Employment Support Initiative (ESI) unit. Note: Tier III cases remain with the assigned EC. |

12.3 Definitions

12.3.1 Unsubsidized Employment

Unsubsidized employment is the Welfare-to-Work (WTW) activity that allows a client to earn wages while continuing to develop job skills and gain work experience for an unlimited period of time. Employers who hire clients into unsubsidized employment positions are not reimbursed for wages earned by the client. Unsubsidized employment is non-exempt income.

12.3.2 Subsidized Employment

Subsidized employment is the WTW activity that allows a client to earn wages while developing job skills and work experience for a limited period of time. Employers who hire clients into subsidized employment positions are reimbursed for wages earned by the client. Subsidized employment is non-exempt income.

12.3.3 Paid Work Experience (PWEX)

PWEX EC Works is a WTW activity in the public or non-profit sector that helps provide new basic job skills and/or enhances existing job skills in an occupation related to the client's experience. Clients are not subject to the Federal Labor Standards Act (FLSA) requirements that unpaid WEX and Community Service clients must follow. The County of Santa Clara pays the earned wages directly to the client and is the employer of record for PWEX positions. PWEX is non-exempt income.

12.3.4 Subsidized College Work Study

Subsidized College Work Study (Sub. College Work Study) is the WTW activity that allows a client to earn wages while attending a community college. Income earned from Subsidized College Work Study is exempt.

12.3.5 Safety Net

A Safety Net individual is a client who has been discontinued from the CalWORKs Assistance Unit (AU) due to timing out from his or her CalWORKs 48-month time on aid (TOA) whose children are still being aided. In a two parent family, where one parent is aided, the timed-out parent can participate in subsidized employment.

12.3.6 Worksite Sponsor

The worksite sponsor is the organization that has agreed to sponsor the client in either a paid/unpaid WEX or Community Service assignment. The worksite sponsor is an organization or program that is in the public or private non-profit sector. The worksite sponsor has agreed to the conditions and terms of the assignment as set forth by the County or the Adult Education or Community College and Federal Labor Standards Act (FLSA).

The "EC Works Worksite Request" (SCD 1790) is completed by the sponsoring organization and Employment Connection Center staff.

12.3.7 For Profit Employer

A “for profit” employer is a business or other organization initiated or operated for the purpose of making a profit. Most companies considered to be businesses are “for profit” organizations. Some examples of “for profit” businesses are: airlines, retail stores, restaurants, insurance companies, technology companies, and banks. The primary goal of “for profit” organizations is to generate income for the company and its investors.

12.3.8 Non-Profit Employer

To be classified as a non-profit employer, an organization has to register as a nonprofit and be approved by the Internal Revenue Service (IRS) to hold tax exempt status. Examples of non-profit employers include: government agencies (city, county, state, federal) charities, churches and foundations. Non-profit organizations usually focus on a goal such as helping the community.

12.3.9 Unsuitable Placements

Job placements must be appropriate considering the goal of developing marketable skills, which lead to self-sufficiency. The placements must not lead to conflict of interest or potentially violate labor laws. To support suitable employment efforts, the county will not place clients into the following employment types:

- Commission-based employment
- Start-up operations
- Home-based operations
- Paid per piece work (ie: paid \$/unit of work - stuffing envelopes, units assembled, phone calls made, petitions signed, etc.)
- Self-Employment
- Businesses in which participant must purchase goods or services, in order to sell to customers
- WTW Plan development for PWEX and Unpaid WEX where the worksite/employer is the same
- Job sites where the participant and supervisor have a direct financial relationship outside of the EC Works placement.

Example: EC Works client is a business partner with the employer they wish to work for.

Exceptions to the above categories may be granted by a SSPM on a case-by-case basis, based on client needs and employment plan. A case conference may be required prior to making this determination.

12.4 Job Development and Referrals

The following chart details the process and responsibilities of assigned ECC EC staff regarding job development and referrals.

12.4.1 Employer Relations

| Step | Who | Action | | |
|---|---|---|--|------------|
| 1. | Employer Relations (ERS) EC | A. Identifies potential employers. B. Schedules meeting with employers to review EC Works services. C. Reviews program policies, procedures and agreements with interested employers. | | |
| | | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;"></th> <th style="width: 50%; text-align: left;">Then . . .</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">in EC Works (Tier I) subsidized positions</td> <td style="vertical-align: top;"> 1. Reviews and ensures EC Works required documents are completed. <ul style="list-style-type: none"> • Agreement • Voided check • Proof of insurance • Job Order request (includes description) • IRS tax forms (including 500 series) • W9 form • “EC Works Authorized Representative” (SCD 2538) form 2. Prepares checklist and employer file for approval. 3. Enters job order request into the Employment Connection Application (ECA) if employer is interested in subsidized positions. </td> </tr> </tbody> </table> | | Then . . . |
| | Then . . . | | | |
| in EC Works (Tier I) subsidized positions | 1. Reviews and ensures EC Works required documents are completed. <ul style="list-style-type: none"> • Agreement • Voided check • Proof of insurance • Job Order request (includes description) • IRS tax forms (including 500 series) • W9 form • “EC Works Authorized Representative” (SCD 2538) form 2. Prepares checklist and employer file for approval. 3. Enters job order request into the Employment Connection Application (ECA) if employer is interested in subsidized positions. | | | |

| Step | Who | Action | |
|--------------|--------------------------|--|--|
| 1. (cont) | ERS EC (cont) | If employer is interested . . . | Then . . . |
| | | and/or PWEX (Tier II) | <ol style="list-style-type: none"> 1. Reviews and ensures EC Works required documents are completed: <ul style="list-style-type: none"> • Agreement • Proof of insurance • Job Order request (includes description) • “EC Works Authorized Representative” (SCD 2538) form 2. Prepares checklist and employer file for approval. 3. Enters job order request into ECA if employer is interested in subsidized positions. |
| 2. | ERS Supervisor | A. Approves agreement packet and submits to APU. | |
| 3. | Admin Payroll Unit (APU) | <ol style="list-style-type: none"> A. Reviews employer file submitted by ERS Supervisor. B. Reviews file for errors. If errors are found, files are returned to the ERS Supervisor for corrective action. C. Submits file with approved checklist to manager for approval. D. Upon manager approval, return to ERS Supervisor to update spreadsheet. ERS Supervisor forwards to the ECC CST for scanning to “S” drive. E. Original documents are maintained and stored by APU after ECC CST completes scanning. | |
| 4. | ECC CST | A. Returns file to APU for updating spreadsheet and creating hard file. | |

12.4.2 Employment Recommendations for Clients

| Step | Who | Action |
|------|---------------|---|
| 1. | ERS EC | <p>A. Participates in the Job Search Community Resource presentation.</p> <ul style="list-style-type: none"> • Completes the client employment synopsis. • Reviews ecstaffing.com with clients. <p>B. ER unit meets weekly to review client profiles from all offices that are participating in job search and networking.</p> <p>C. Discusses current job orders, specialized job opportunities and employers that may be a fit for the client. The ER EC that presents at the Job Search Community Resource presentation will send an email to JPR ECs with job recommendations.</p> <ul style="list-style-type: none"> • Email subject line will read: "Client Consultation Session" and will include: <ol style="list-style-type: none"> (1) Client name (2) Case number (3) Career objective (4) Job order number and/or job title and employer name (5) Additional comments that might assist with interview and/or employment placement. • Job recommendations are noted in case comments in CalWIN (Type: Employment Connection). |
| | JPR EC | <p>D. Continues assisting clients with job search and/or job leads found in ECA and other available employment resources.</p> <p>E. When referring a client to an interview from a lead in ECA:</p> <ul style="list-style-type: none"> • Emails the employer with an attached resume, client profile and a brief description of the job. • Copies the ERS EC on the same email. |
| | ERS & JPR ECs | <p>F. Continues on-going communication on employment opportunities for clients by email, in person or phone.</p> <p>G. Meets one-on-one or group, as needed, to discuss additional job opportunities.</p> <p>H. Participates in case conferencing as needed.</p> |

| Step | Who | Action |
|------|--------|--|
| 2. | ERS EC | <p>Worksite Issues/Concerns</p> <p>A. All worksite issues/concerns should be addressed by the ERS EC.</p> <p>Note: If the JPR EC becomes aware of an issue/concern and is not able to contact the ERS EC to address the issue, the JPR EC can address the issue/concern and must inform the ERS EC of the issue.</p> <p>B. Discusses issues/concerns with both worksite and client</p> <p>C. Works with JPR EC to address the situation.</p> <p>D. Schedules a case conference</p> <p>E. Creates a plan to address the situation (employer and client).</p> <p>Note: JPR EC responsible for client. ERS EC responsible for worksite employer.</p> <p>F. Enters case comments in CalWIN (Type: EC).</p> |
| 3. | ERS EC | <p>Recruitment Debriefs</p> <p>Recruitment is the selection and scheduling of employers by the ER unit to have the employer give a presentation and description of their company/business and their available jobs to our job seekers.</p> <p>A. After every recruitment a debrief will be emailed to staff and supervisors. Debrief will include:</p> <ul style="list-style-type: none"> • Employer name • Jobs available • Number of attendees, both public and ECC job seekers • Names of clients who showed interest or interviewed with employer, along with assigned JPR EC. • Other information as required/needed. |

12.5 Subsidized to Unsubsidized Reporting

When transferring a client from subsidized to unsubsidized employment, the following must be entered on the CalWIN Employment Activity screen:

- There will be one existing entry (row) for the subsidized employment activity, followed by
- One entry (row) for the unsubsidized employment activity.

Note: Activity status of **transfer** must be used. **Do not** use activity status of *completed*.

12.5.1 CalWIN Employment Activity

The following table reflects the CalWIN employment activity type to be used when a client is:

- Placed into EC Works Subsidized Employment (Tier I) full-time (30 hours or more) or part-time, Paid Work Experience (PWEX - Tier II), Subsidized College Work Study; or
- Being transferred to EC Works Unsubsidized Employment



Note:

For Tier I Subsidized to Unsubsidized, [Refer to “Tier I Subsidized to Unsubsidized,” page 12-26]; for Tier II Subsidized to Unsubsidized, [Refer to “Tier II PWEX Subsidized to Unsubsidized,” page 12-35].

| Activity | Who | CalWIN Activity | CalWIN Provider | Activity Definition |
|----------|--------|----------------------------------|---|---|
| 1. | JRP EC | EC Works Subsidized FTE (Tier I) | CWES 1879 Senter Road CWES NC CWES SC | Use when client is on cash aid and has been placed into an <u>EC Works full-time subsidized</u> employment position. This will be noted on the “Schedule A” (SCD 2466) by the Placement EC. |
| 2. | JRP EC | EC Works Unsubsidized FTE | CWES 1879 Senter Road CWES NC CWES SC | Use when a client is on cash aid and has been placed in an <u>EC Works full-time unsubsidized</u> employment position. JRP EC will verify when and which employer the client has been transitioned to. Note: Employer does not have to be the same. |
| 3. | JRP EC | EC Works Subsidized PTE (Tier I) | CWES 1879 Senter Road CWES NC CWES SC | Use when client is on cash aid and has been placed into an <u>EC Works part-time subsidized</u> employment position. This will be noted on the “Schedule A” (SCD 2466) by the Placement EC. |
| 4. | JRP EC | EC Works Unsubsidized PTE | CWES 1879 Senter Road CWES NC CWES SC | Use when a client is on cash aid and has been placed into a <u>part-time unsubsidized employment position</u> . JRP EC will verify when and which employer the client has been transitioned to. |

| Activity | Who | CalWIN Activity | CalWIN Provider | Activity Definition |
|----------|--------|-------------------------|---|---|
| 5. | JRP EC | Unsubsidized Employment | Provider Not Specified | Use when a client is <u>on cash aid</u> and has been placed into unsubsidized employment (FTE or PTE) from an activity other than subsidized employment from EC Works. |
| 6. | JRP EC | Paid WEX | CWES 1879 Senter Road CWES NC CWES SC | Use when client is <u>on cash aid</u> and has been placed into a part-time subsidized paid WEX position. |
| 7. | CM EC | Sub. College Work Study | CWES 1879 Senter Road CWES NC CWES SC | Use when client has been placed into a CalWORKs college subsidized work study position. Note: This activity will only be used if "Schedule A" (SCD 2466) is received from the college liaison and approved by ESI. |

The following WTW activities are used when a client is off cash aid due to EC Works subsidized or unsubsidized employment. The EC is also to select EC Works Employment Follow-Up (EFU) as the case comment description type in CalWIN.

| Activity | Who | CalWIN Activity | CalWIN Provider | Activity Definition |
|----------|-----------------|------------------------------------|-----------------------|---|
| 8. | CM Retention EC | Employed Subsidized PAS EC Works | CWES 1879 Senter Road | Use when a client has been discontinued from cash aid due to EC Works subsidized employment. |
| 9. | CM Retention EC | Employed Unsubsidized PAS EC Works | CWES 1879 Senter Road | Use when a client has been discontinued from cash aid due to EC Works subsidized employment <u>AND</u> is being transferred to unsubsidized employment. |

The following WTW activities are used when a Safety Net client is placed into subsidized or unsubsidized employment:

| Activity | Who | CalWIN Activity | CalWIN Provider | Activity Definition |
|----------|--------|------------------------------|-----------------------|--|
| 10. | JRP EC | Safety Net EC Works Sub Empl | CWES 1879 Senter Road | Use when Safety Net client is placed into subsidized employment. |

| Activity | Who | CalWIN Activity | CalWIN Provider | Activity Definition |
|----------|--------|-----------------------------------|--------------------------|--|
| 11. | PAS EC | Safety Net EC Works Unsub Empl | CWES 1879 Senter Road | Use when a Safety Net client has completed the <u>Safety Net EC Works Sub Empl</u> employment position, when and which employer the client has been transitioned to. Note: Employer does not have to be the same. |

12.6 Tier I - Subsidized Employment Overview

ECC staff develop and place eligible clients into subsidized employment positions throughout the county in the private sector. The employer of record is the employer who hires the client and pays the earned wages directly to the client based on their payroll cycle. The goal of the program is to transition clients to unsubsidized employment by the end of the assignment.

Note: Client cannot exceed 6 months of subsidized employment in Tier I. Typically positions are three months in length. With management approval, a three month extension may be available.

12.6.1 Tier I Wages, Hours and Participation

Hourly wage varies and must be equivalent to or higher than the City of San Jose minimum wage ordinance or local city ordinances. Clients are employed up to 40 hours per week, full or part-time, and positions are three to six months in length. The income earned is considered non-exempt income for the purpose of determining eligibility for public assistance, which means it must be budgeted towards the CalWORKs grant, CalFresh and Medi-Cal.

12.6.2 Agreements and Invoicing Standards

Agreements and authorized representative forms are official binding documents. Any changes, errors or corrections will require new documents to be submitted for review and approval by the participating parties.

12.6.3 Tier I New Agreement Process

| Step | Who | Action |
|------|-----------------------------|--|
| 1. | Employer Relations (ERS) EC | <p>Reviews Tier I agreement with employer and explains the following:</p> <ul style="list-style-type: none"> A. Agreement term dates B. Reimbursement rates and required documents for invoicing the county (pay stubs and signed invoices, including the "EC Works Authorized Representative" (SCD 2538) form C. Employee pay rates (must be at/or above City of San Jose minimum wage or local city ordinances) D. Time worked, sick leave, holiday and overtime pay E. Payments (timelines and electronic payments) F. Fiscal monitoring G. Staffing agencies clause, if applicable H. Confidentiality I. Indemnity and Insurance J. Termination of worksite agreement K. Job order form L. City, county, state and federal employment regulations. |

| Step | Who | Action |
|------|----------------|---|
| 2. | ERS EC | <p>If employer agrees to participate, obtain the following documents, review for completion and submit to ER Supervisor with EC Checklist for review:</p> <p>A. Signed</p> <ul style="list-style-type: none"> • Identifies and records business legal name and “doing business as” (DBA). • Identifies and records term dates. • On signature page, obtains employer signature, printed name, date, organization name and address. <p>B. “EC Works Authorized Representative” (SCD 2538) form</p> <ul style="list-style-type: none"> • Works with organization to identify and record names and signatures of authorized representatives that may sign on behalf of the organization. • Obtains signature, printed name, date, organization name and address from authorized representative of the organization (the organization name must be identical to name listed on agreement). <p>C. Electronic payment registration form</p> <ul style="list-style-type: none"> • Employer will provide their bank and branch name, account number, routing number and an email address. • Employer will provide company name, address, signature and title. • Voided check, to verify bank account and routing information. <p>D. W9</p> <ul style="list-style-type: none"> • Employer provides completed form (business name must match name on agreement). <p>E. 500 Series forms (587, 588, 589, 590) (Only required for out of state address or P.O. Box)</p> <p>F. Insurance</p> <ul style="list-style-type: none"> • Employer will provide verification of liability and worker’s compensation coverage. <p>G. Job order form</p> <ul style="list-style-type: none"> • Detailed description of jobs available. |
| 3. | ERS Supervisor | <p>A. Reviews agreement packet and checklist.</p> <p>B. Signs and forwards approved agreement packet with approved checklist to Admin Payroll Unit.</p> <p>C. Rejects any incomplete agreements to ER EC for correction.</p> |

| Step | Who | Action | |
|------|--------------------|--|---|
| 4. | APU | <p>A. Reviews all documents for completeness and accuracy.</p> <p>B. Checks business names and all dates.</p> <p>C. Checks effective dates of coverage amount for general liability insurance and workers compensation.</p> <p>D. Reviews all forms (A-G) listed under Step 2.</p> <p>E. Signs off approval of agreement and forwards to designated manager for review and signature.</p> <p>F. Creates a master file for each employer with the original documents.</p> <p>G. Any agreement packets that are not approved by the APU will be returned to the ERS Supervisor for correction.</p> | |
| 5. | Designated Manager | A. Signs agreement and returns to APU. | |
| 6. | APU | If... | Then... |
| | | New Tier I Agreement | <ul style="list-style-type: none"> • Reviews Electronic Payment Registration form for completion, compare bank account and routing numbers on check and Electronic Registration form, review status on W9 (ensuring tax clarification code is checked). • Forwards Electronic Payment Registration to FMS for new Vendor Id Number (VIN) and copies ESI Fiscal unit. • E-mails scanned copy of the Agreement to the Employer. • Forwards signed Agreement and VIN to ESI Fiscal unit when client is placed at worksite. |
| | | Tier I Agreement Renewal | <ul style="list-style-type: none"> • Retains signed Agreement and forwards VIN and Renewed Agreement to ESI Fiscal unit when client is placed at worksite. <p>Note: FMS step 7 is skipped.</p> |
| 7. | FMS | <p>A. Performs TIN Match.</p> <p>B. Forwards Electronic Payment Registration documents to Controller's office for VIN number assignment.</p> <p>C. Emails VIN number to APU (ecworkspayroll@ssa.sccgov.org) and ESI Fiscal unit.</p> | |

| Step | Who | Action |
|------|-----------------|---|
| 8. | ESI Fiscal Unit | <p>A. Assigns Agreement for SAP upload and new PO #.</p> <p>B. Creates PO # in SAP.</p> <p>C. Fills out Blue Sheet, forwards to ESI SSPM for signature. When signed, scan and save in “S” drive and sends original to FMS.</p> <p>D. Records VIN and PO # in Master Excel spreadsheet in “S” drive.</p> <p>E. Email VIN and PO # to Admin Payroll Unit (ecworkspayroll@ssa.sccgov.org).</p> <p>F. Saves copy of agreement in ESI “S” drive.</p> |
| 9. | APU | <p>A. Saves electronic copy of agreement, VIN and PO #.</p> <p>B. Enters VIN and PO# in ECA employer account profile on “S” drive.</p> <p>C. Notifies ECC CST and ERS Supervisor.</p> <p>D. Logs insurance information.</p> <p>E. Mails scanned copy of agreement to employer.</p> |

12.6.4 Tier I Agreement Renewal

| Step | Who | Action | |
|------|----------------|---|--|
| 1. | ERS EC | If employer . . . | Then . . . |
| | | no longer wishes to participate | ERS EC informs APU and JPR Supervisor. |
| | | | APU removes employers who are no longer participating in Tier I from the Certificate of Insurance spreadsheet. |
| 2. | APU | ERS Supervisor changes status of employers no longer participating in the subsidized employment program to inactive or unsubsidized in ECA. | |
| 3. | ERS Supervisor | | |

| Step | Who | Action | |
|------|--------|---|--|
| 4. | ERS EC | If employer agrees to continue to participate | <p>Then obtains the following documents, reviews for completion and submits to supervisor for review.</p> <p>A. Reviews agreement and verifies the following:</p> <ul style="list-style-type: none"> • Dates on first and last page are accurate and not past end of current fiscal year (term start date is at least two weeks from date packet is being submitted). • FULL legal name of business is used. • If employer is DBA, agreement must include legal names and DBA name on first AND last page. • All fields on signature page are complete. • Business name matches on first page and signature page. • Signature page is signed and dated. • Complete cover sheet/checklist, sign and submit to supervisor. Cover sheet is not needed if DocuSign is used. <p>B. Reviews and verifies “EC Works Authorized Representative” (SCD 2538) form.</p> <ul style="list-style-type: none"> • Signer is same person who signed agreement. • Names and signatures of authorized representatives are current. • If names are not current, obtain a new ARF or company letter with the name of the person or position changed. <p>C. Evidence of liability insurance.</p> <ul style="list-style-type: none"> • Collects updated insurance information. • Updates if insurance is scheduled to expire within the month. • Business name must match agreement. |

| Step | Who | Action |
|-----------|--------------------|---|
| 4. (cont) | ERS EC (cont) | <p>Employer agrees to continue to participate (cont)</p> <p>D. Evidence of Liability Insurance</p> <ul style="list-style-type: none"> • Collects updated insurance information. • Updates if insurance is scheduled to expire within a month. • Business name must match agreement. <p>E. Evidence of Worker's Compensation Insurance</p> <ul style="list-style-type: none"> • Collects updated insurance information. • Updates if insurance is scheduled to expire within a month. • Business name and address matches agreement, or provide explanation why address is different from the box marked "Insured" on the Certificate of Liability Insurance form. • Automobile insurance when appropriate (if client will be driving company vehicle). • Document must be signed. • SSA DEBS address (1879 Senter Road) is written in the Certificate Holder box on the insurance form. |
| 5. | ERS Supervisor | <p>A. Reviews agreement, ARF and Certificate of Insurance.</p> <p>B. Forwards approved agreement to APU.</p> <p>C. Rejects any incomplete or incorrect agreements to ERS EC for correction.</p> |
| 6. | APU | <p>A. Reviews all documents for completion and accuracy.</p> <p>B. Checks business names and all dates.</p> <p>C. Forwards to designated manager for review and signature.</p> <p>D. Updates master file for each employer with original documents.</p> <p>E. Any agreement not approved by designated manager will be returned to JPR Supervisor for correction.</p> |
| 7. | Designated Manager | <p>A. Signs agreement and returns to APU.</p> |
| 8. | APU | <p>A. Forwards VIN and renewed agreement to ESI Fiscal.</p> |

| Step | Who | Action |
|------|----------------|--|
| 9. | ESI Fiscal | <p>Employer agrees to continue to participate (cont)</p> <p>A. Assigns Agreement for SAP upload and new PO #.</p> <p>B. Creates PO # in SAP.</p> <p>C. Fills out Blue Sheet, forwards to ESI SSPM for signature. When signed, scanned and saved in “S” drive, sends original to FMS.</p> <p>D. Records VIN and PO # in Master Excel spreadsheet in “S” drive.</p> <p>E. Email VIN, and PO # to APU (ecworkspayroll@ssa.sccgov.org).</p> |
| 10. | APU | <p>A. Saves electronic copy of agreement, VIN and PO # to “S” drive.</p> <p>B. Enters VIN and PO# in ECA employer account profile on “S” drive.</p> <p>C. Notifies ECC CST and ER supervisor.</p> <p>D. Logs insurance information.</p> <p>E. E-mails scanned copy of agreement to employer. Blind copies ERS EC and ER supervisor.</p> |
| 11. | ERS Supervisor | <p>A. Updates spreadsheet to show agreement has been completed with designated manager signature.</p> |

12.6.5 Tier I Subsidized Job Placement

| Step | Who | Action |
|------|--------|--|
| 1. | JPR EC | <p>A. Checks client’s time on aid (TOA)</p> <ul style="list-style-type: none"> • Clients must be active on cash aid. • Individuals approaching 42 months of their CalWORKs 48-month time on aid and Safety Net clients may be placed in Tier I [Refer to “WTW Participants Approaching 42 Months,” page 12-49] and [Refer to “Safety Net (48-Month Timed-Out) Individuals,” page 12-50]. <p>B. Provides client with EC Works Program Overview.</p> <p>C. Reviews possible worksites with client and determines appropriate placement.</p> <p>D. Arranges interview with worksite supervisor and prepares client for interview.</p> |

| Step | Who | Action | |
|-----------------------------|---|--------------------------------------|--|
| 1. cont | JPR EC (cont) | E. Follows up on worksite interview. | |
| | | If client is . . . | Then . . . |
| | | not hired in Tier I | <ol style="list-style-type: none"> 1. Reviews results with client. 2. Repeats Step 1, A through E, until placement occurs and/or continues with other job search until assigned WTW activity ends. |
| hired in Tier I EC Works | <ol style="list-style-type: none"> 1. From the DocuSign home page, click on the “New” button and select “Use a Template”. 2. From the “Select Template” screen clicks on “All Templates”, types in “CWES” and selects the radio button for “SSA CWES Schedule A Subsidized Employment Verification” and clicks on “Add Selected”. 3. Identifies recipients and inputs email addresses: Employer (Worksite Supervisor), JPR Supervisor and Admin Payroll Unit (APU). 4. Completes all applicable fields in the EMPLOYEE INFORMATION section of form. 5. Completes the following fields in the EMPLOYMENT INFORMATION section: <ul style="list-style-type: none"> • Organization (adds “EC Works” before organization name), Doing Business As, Worksite Name and Address fields, (MUST match information in ECA). • Business Type (selects Non-Profit or Profit). 6. DocuSign routes “Schedule A” (SCD 2466) to Worksite Supervisor. 7. Submit Tier I employment documents to APU (last page of current year Tier I Agreement and/or “EC Works Authorized Representative” (SCD 2538) form. | | |

| Step | Who | Action | |
|------|---------------------|--|---|
| 2. | Worksite Supervisor | If client is . . . hired in Tier I EC Works (cont) | Then . . . 1. Receives "Schedule A" (SCD 2466) via DocuSign. 2. Completes EMPLOYMENT INFORMATION section: Job Title, Job Order #, Hourly Pay Rate, Number of hours per week, How often will employee be paid (selects frequency from drop down menu), Tentative Weekly Schedule, Organization Contact Person, Telephone No, Contact Email, Authorized Official of the Organization, Title, Telephone Number and Date. 3. Electronically signs "Schedule A" (SCD 2466) using DocuSign and document is routed to JPR Supervisor. |
| 3. | JPR Supervisor/Lead | | 1. Receives and reviews copy of "Schedule A" (SCD 2466) for completeness and accuracy. |
| 4. | JPR EC | | 1. Completes WTW 2 (ensures signed by client and submits to Integrated Document Management System (IDM), CalWIN entries, ECA entries, and pays ancillary (if needed). ALL dates on "Schedule A" (SCD 2466) MUST match ECA and CalWIN. 2. Creates TMT, attaches copy of "Schedule A" (SCD 2466) and sends to EW to enter employment information in CalWIN. Then adds the TMT number to Schedule A prior to sending to IDM. 3. Once TMT is processed by EW: <ul style="list-style-type: none"> • Verifies "EC WORKS" has been entered in front of the employer name in CalWIN and • Updates Employment Follow-up windows in CalWIN. Refer to ["Employment Retention Services," page 29-10] for information on Job Tab, Placement Tab, Job Services Tab, and Follow up Tab. 4. Enters "First Day Attendance" (FSTD) in CalWIN when client shows on first day. 5. Notifies assigned CM Retention EC of Tier I placement. |
| 5. | Assigned CM EC | | 1. Reviews WTW2 in IDM, CalWIN entries, and supportive services. 2. Transfers case to CM Retention EC via SCD 163T. |

12.6.6 Tier I Invoicing - DocuSign

| Step | Who | Action | | | | | | |
|---|---|---|-------------------|------------|------------------------------------|--|---|---|
| 1. | APU | <p>A. Pre-fills top section of invoice:</p> <ul style="list-style-type: none"> • Organization • DBA • Vendor ID • PO Number • Remit Payment to • Contact Person • Phone • Employee name • Case Number • Start Date • End Date • JPR EC <p>B. On the first business day of each month:</p> <ul style="list-style-type: none"> • Logs into DocuSign. • Creates a “New Envelope” • Selects “Browse from Computer” and selects employer’s invoice from “S” drive file. • Applies a DocuSign template. <table border="1" data-bbox="448 1339 1536 1692"> <thead> <tr> <th data-bbox="448 1339 812 1390">If DocuSign . . .</th> <th data-bbox="812 1339 1536 1390">Then . . .</th> </tr> </thead> <tbody> <tr> <td data-bbox="448 1390 812 1476">auto-matches the uploaded document</td> <td data-bbox="812 1390 1536 1476"> <ul style="list-style-type: none"> • select “SSA CWES Tier I Invoice” template. </td> </tr> <tr> <td data-bbox="448 1476 812 1692">does not auto-match the uploaded document</td> <td data-bbox="812 1476 1536 1692"> <ul style="list-style-type: none"> • chooses “Apply Template” from the document actions drop down menu. • “Apply Template” window will open • from left hand column choose “Shared Templates” and choose “SSA CWES Tier I Invoice template and select. </td> </tr> </tbody> </table> | If DocuSign . . . | Then . . . | auto-matches the uploaded document | <ul style="list-style-type: none"> • select “SSA CWES Tier I Invoice” template. | does not auto-match the uploaded document | <ul style="list-style-type: none"> • chooses “Apply Template” from the document actions drop down menu. • “Apply Template” window will open • from left hand column choose “Shared Templates” and choose “SSA CWES Tier I Invoice template and select. |
| If DocuSign . . . | Then . . . | | | | | | | |
| auto-matches the uploaded document | <ul style="list-style-type: none"> • select “SSA CWES Tier I Invoice” template. | | | | | | | |
| does not auto-match the uploaded document | <ul style="list-style-type: none"> • chooses “Apply Template” from the document actions drop down menu. • “Apply Template” window will open • from left hand column choose “Shared Templates” and choose “SSA CWES Tier I Invoice template and select. | | | | | | | |

| Step | Who | Action |
|------|------------|--|
| 2. | APU (cont) | <p>C. Identify signatories and email addresses in signature routing sequence:</p> <ul style="list-style-type: none"> • Employer • Admin Payroll unit signing group • MA • FMS <p>D. Tailor e-mail message for employer and due date.</p> <p>E. On “Tags” page, make sure all of the tags are aligned.</p> <p>F. Send.</p> |
| 3. | Employer | <p>Completes invoice and returns to APU by the 10th of each month.</p> <p>A. Receives DocuSign e-mail from APU.</p> <p>B. Enters employee pay rate, number of hours worked and total reimbursement requested.</p> <p>C. Clicks on “Attachments” tag at the bottom of sheet and uploads paystubs.</p> <ul style="list-style-type: none"> • paystubs should cover 4 weekly pay periods, 2 bi-weekly pay periods or 1 monthly pay period. <p>D. Electronically signs document.</p> |
| 4. | APU | <p>A. Reviews invoice and verifies the following:</p> <ul style="list-style-type: none"> • P.O. • VIN • Employer name • Invoice month • Cross reference (invoice and paystubs), invoice month, pay periods, hours worked, pay rate • Insurance • Supervisor (authorized to sign) <p>B. Initials to verify insurance.</p> <p>C. Forwards to co-worker for secondary review.</p> <p>D. When approved, signs invoice indicating that invoice is authorized for payment.</p> <p>E. Resolves any invoicing issues.</p> <p>F. Forwards document to FMS.</p> |
| 5. | FMS | <p>A. Initiates payment.</p> |

12.6.7 Tier I Subsidized to Unsubsidized

| Step | Who | Action |
|------|---------------------|---|
| 1. | Worksite Supervisor | <p>A. Offers unsubsidized position to client.</p> <p>B. Informs JPR EC of hire.</p> |
| 2. | JPR EC | <p>A. Completes a “Request for Information on Termination of Employment” (SCD 549B) for the position being vacated and sends to IDM.</p> <p>B. Completes “Request for Employment Information” (SCD 549A) for the new position and sends to IDM. Note: The 549A should not have EC Works prefix by the employer name.</p> <p>C. Completes separate TMTs to notify EW, and attaches SCD 549B and then new SCD 549A to update employment information in CalWIN.</p> <p>D. Completes a new WTW 2 for the unsubsidized employment.</p> <p>E. Enters CalWIN Case Comments.</p> <p>F. Updates ECA by completing a new Self Placement screen and by checking “sub to unsub” box. ECA will automatically send an e-mail alert to JPR Supervisor and CM Retention EC.</p> <p>G. Sends an e-mail to CM Retention EC regarding the change.</p> |
| 3. | CM Retention EC | <p>A. Updates CalWIN activities and CalWIN Employment window; and enters case comments. Window must show “Sub” and “Unsub” record to show in DSR report. All dates MUST match. [Refer to “Subsidized to Unsubsidized Reporting,” page 12-11] for list of activities.</p> <p>B. Monitors case throughout the subsidized and 90 day unsubsidized follow-up period.</p> |
| 4. | JPR Supervisor | <p>A. Receives update from ECA indicating client’s position has become unsubsidized.</p> |



Note:

Subsidized to unsubsidized employment occurs within 30 days of the last date of subsidized employment with any employer (does not have to be the same employer) for placement credit purposes.

12.6.8 Tier I Separations

| Step | Who | Action | |
|------|--------------------|--------------------------------------|---|
| 1. | Employer or Client | Informs JPR EC of employment change. | |
| 2. | JPR EC | If... | Then... |
| | | client is released or quits | <ul style="list-style-type: none"> provides employer with "Request for Information on Termination of Employment" (SCD 549B). sends completed "Request for Information on Termination of Employment" (SCD 549B) to IDM and updates TMT. enters case comments in CalWIN and updates ECA. sends an e-mail to CM Retention EC for re-engagement of client. notifies APU. receives final evaluation from employer. |

12.7 Tier II - Paid Work Experience (PWEX)

Tier II primarily differs from unpaid WEX in that clients are paid, not subject to FLSA requirements and are referred to subsidized positions through the activities of Supervised Job Search and Part-Time Job Search.

PWEX positions are in the non-profit sector. The County of Santa Clara is the employer of record and pays wages directly to the client.

12.7.1 Tier II Wages, Hours and Participation

Tier II clients are paid at a rate determined by the county and are employed 20 hours per week. These positions are six months in length. The income earned is considered non-exempt income for the purpose of determining eligibility for public assistance.

12.7.2 Tier II Adult Education/Community College Referrals

A client who is concurrently enrolled with a community college or adult education service provider and is interested in subsidized employment can be referred to EC Works. Clients must agree to continue their concurrent activity while working with EC Works staff in securing employment.

Prior to referral, service providers must screen clients for the following criteria:

- Client must be able to work 20 hours per week,
- English as a second language (ESL) clients must be at least a Level 2.
- Must have a California ID, social security card and right to work documentation.
- Have a resume (preferred).

| Step | Who | Action |
|------|--|---|
| 1. | Adult Education Site Representative or Community College Liaison | A. Reviews the services and requirements of EC Works with client. Client must agree to continue with concurrent activity. B. Completes "Welfare-to-Work Activity Referral Form" (SCD 1723) and emails to ecworks@ssa.sccgov.org with following message on subject line: "Adult Ed Referral" or "Community College Referral". |
| 2. | ECC CST | C. Retrieves e-mail and forwards to JPR lead. |
| 3. | JPR Lead | D. Assigns to JRP EC in ECA. |

| Step | Who | Action | | | | | | |
|--|--|--|----------|------------|--|--|--|---|
| 4. | JRP EC | <p>A. Contacts client to set up appointment for job search and placement.</p> <p>B. Meets with client, reviews/assists with resume and/or master application. Works with client for up to 4 weeks.</p> <p>C. Continues to meet with client, as needed, for job placement assistance.</p> <p>Note: JRP EC will contact the service provider if the client misses appointments during the 4 week period.</p> <p>D. Informs Site Representative or Liaison once client obtains subsidized employment.</p> <table border="1" data-bbox="581 751 1398 1432"> <thead> <tr> <th data-bbox="581 751 889 806">If . . .</th> <th data-bbox="889 751 1398 806">Then . . .</th> </tr> </thead> <tbody> <tr> <td data-bbox="581 806 889 1188">client obtains part-time subsidized employment</td> <td data-bbox="889 806 1398 1188"> <ul style="list-style-type: none"> • site Representative or Community College Liaison updates WTW 2 to reflect educational activity with EC Works Subsidized Part-Time Employment. • service provider gives copy of WTW 2 to client. • sends the WTW 2 to assigned CM EC for CalWIN entries and support services. </td> </tr> <tr> <td data-bbox="581 1188 889 1432">client obtains full-time subsidized employment</td> <td data-bbox="889 1188 1398 1432"> <ul style="list-style-type: none"> • JRP EC follows documented process. [Refer to “Job Retention Tier I & Tier II,” page 12-38], Step 3. • JRP EC will inform service provider and assigned CM EC via email of client’s employment. </td> </tr> </tbody> </table> | If . . . | Then . . . | client obtains part-time subsidized employment | <ul style="list-style-type: none"> • site Representative or Community College Liaison updates WTW 2 to reflect educational activity with EC Works Subsidized Part-Time Employment. • service provider gives copy of WTW 2 to client. • sends the WTW 2 to assigned CM EC for CalWIN entries and support services. | client obtains full-time subsidized employment | <ul style="list-style-type: none"> • JRP EC follows documented process. [Refer to “Job Retention Tier I & Tier II,” page 12-38], Step 3. • JRP EC will inform service provider and assigned CM EC via email of client’s employment. |
| If . . . | Then . . . | | | | | | | |
| client obtains part-time subsidized employment | <ul style="list-style-type: none"> • site Representative or Community College Liaison updates WTW 2 to reflect educational activity with EC Works Subsidized Part-Time Employment. • service provider gives copy of WTW 2 to client. • sends the WTW 2 to assigned CM EC for CalWIN entries and support services. | | | | | | | |
| client obtains full-time subsidized employment | <ul style="list-style-type: none"> • JRP EC follows documented process. [Refer to “Job Retention Tier I & Tier II,” page 12-38], Step 3. • JRP EC will inform service provider and assigned CM EC via email of client’s employment. | | | | | | | |
| 5. | Assigned CM EC | <ul style="list-style-type: none"> • Reviews WTW2 • Enters CalWIN activities in CalWIN. • Reviews supportive services. • Transfer case to CM Retention EC via SCD 163T. | | | | | | |

12.7.3 Tier II Subsidized Job Placement

| | | | |
|----|------------------------------|--|--|
| 1. | JPR EC | <p>A. Checks client's time on aid (TOA)</p> <ul style="list-style-type: none"> • Clients must be active on cash aid or Safety Net. • Supervisor may authorize placement on a case-by-case basis for clients with less than 6 months TOA for Tier II. <p>B. Provides client with PWEX program overview.</p> <p>C. Reviews possible worksites with client and determines appropriate placement.</p> <p>D. Arranges interview with worksite supervisor, prepares client for interview.</p> <p>E. Follows up on worksite interview.</p> | |
| | | Then . . . | |
| | | not hired in Tier II | <ol style="list-style-type: none"> 1. reviews results with client. 2. Repeats Step 1 until placement occurs and/or continues with other job search until assigned WTW activity ends. |
| | hired in Tier II EC Works | <ol style="list-style-type: none"> 1. Obtains employment packet with the following documentation: <ul style="list-style-type: none"> • I9 • W4 • DE4 • City of San Jose opt out form (only in San Jose) • Confidentiality Agreement (SCD 197) • Personal physician form • "Client Emergency Contact Card" (SCD 2529) form • Social Security card • Photo identification • Sick leave form 2. Submits employment packet to supervisor for review. 3. Routes to APU when approved by supervisor. | |

| Step | Who | Action |
|-----------|---------------------|---|
| 1. (cont) | JPR EC (cont) | <p>hired in Tier II EC Works (cont)</p> <ol style="list-style-type: none"> 4. Completes the following fields in the EMPLOYMENT INFORMATION section of the "Schedule A" (SCD 2466): <ul style="list-style-type: none"> • Organization (adds "PWEX" in front of organization name), Doing Business As, and Worksite Name and Address fields. (MUST match information in ECA). • Checks "Non-Profit" box on "Schedule A" (SCD 2466) to indicate employer is non-profit. 5. Completes EMPLOYMENT INFORMATION section: Job Title, Hourly Pay Rate, Number of hours per week, How often will employee be paid, Weekly Schedule, Organization Contact Person, Telephone number, Contact Email, Authorized Official of the Organization, Title, Telephone Number and Date. 6. Sends "Schedule A" (SCD 2466) to Worksite Supervisor. |
| 2. | Worksite Supervisor | <ol style="list-style-type: none"> 1. Receives "Schedule A" (SCD 2466) via DocuSign. 2. Completes information in EMPLOYMENT INFORMATION section. 3. Electronically signs "Schedule A" (SCD 2466) using DocuSign and document is routed to JPR Supervisor. |
| 3. | JPR Supervisor/Lead | <ol style="list-style-type: none"> 1. Receives "Schedule A" (SCD 2466) via DocuSign. 2. Reviews "Schedule A" (SCD 2466) for completeness and accuracy. 3. If "Schedule A" (SCD 2466) is not correct, reviews with JPR EC. |

| Step | Who | Action |
|------|----------------|---|
| 4. | JPR EC | <p>hired in Tier II (cont)</p> <ol style="list-style-type: none"> 1. Completes WTW 2 (ensures signed by client and submits to IDM), CalWIN entries, ECA entries, and pays ancillary (if needed). ALL dates on "Schedule A" (SCD 2466) MUST match ECA and CalWIN. 2. Creates TMT, attaches copy of "Schedule A" (SCD 2466) and sends to EW to enter employment information in CalWIN. Then adds the TMT number prior to sending to IDM. 3. Once TMT is processed by EW: <ul style="list-style-type: none"> • Verifies "PWEX" has been entered in front of the employer name in CalWIN and updates employment services follow-up windows • Enters Profit/Non-Profit in CalWIN. Refer to ["Employment Retention Services," page 29-10] for information on Job Tab, Placement Tab, Job Services Tab, and Follow Up Tab. 4. Enters "FSTD" in CalWIN when client shows on first day. 5. Notifies assigned CM Retention EC of Tier II placement. |
| 5. | APU | <ol style="list-style-type: none"> 1. Receives electronically signed copy of "Schedule A" (SCD 2466) for subsidized employment file and reviews for completeness and accuracy. 2. If "Schedule A" (SCD 2466) is not correct, notes discrepancies. 3. Sends corrected "Schedule A" (SCD 2466) to IDM. |
| 6. | Assigned CM EC | <ol style="list-style-type: none"> 1. Reviews new WTW 2 and "Schedule A" (SCD 2466) in IDM from JPR EC. 2. Reviews WTW plan and CalWIN entries. 3. Resolves any discrepancies with the assigned JPR EC. 4. Transfers case to CM Retention EC via SCD 163T. |



Note:

For Adult Education placements, the assigned EC receives the WTW 2 plan from the Adult Education liaison.

12.7.4 Tier II Timesheets and Payroll Processing - DocuSign

The PWEX Payroll Calendar indicates the pay period number, start and end date of each pay period, the due dates for timesheets and the payday.

| Step | Who | Action |
|------|---------------------|--|
| 1. | APU | <p>Upon receiving the employee file number from FMS:</p> <p>A. Pre-fills top section of Timesheet (Tier II)</p> <ul style="list-style-type: none"> • Employee File # • Pay Period # • Employee Name • Employment Start Date • Company Name • Expected End Date • JPR EC • CalWIN Case Number • Date range of pay period <p>B. Saves in client folder on “S” drive.</p> <p>C. Post sick leave hours on shared drive.</p> |
| 2. | APU | <p>A. Identify and post aid code for each client prior to sending envelope.</p> <p>B. Create an envelope using DocuSign.</p> <p>C. Send timesheet/invoice to client for review and signature.</p> |
| 3. | Client | <p>A. Completes total hours worked during pay period.</p> <p>B. Signs and forwards to Worksite Supervisor.</p> |
| 4. | Worksite Supervisor | <p>A. Reviews hours worked.</p> <p>B. Approves document and forwards to APU.</p> |
| 5. | APU | <p>A. Reviews document.</p> <p>B. Makes updates and changes if necessary (corrects errors or returns to employer for corrections).</p> <p>C. Communicates with employer and client if minor changes are made.</p> <p>D. If all is correct, forwards document to FMS.</p> |

| Step | Who | Action |
|------|-----|--|
| 6. | FMS | A. Receives timesheets and issues payments. B. Contacts APU if adjustments to timesheets are needed. C. Enters payroll data into ADP system. D. Retains electronic records (scanned timesheets) in file. E. Provides ADP with final authorization of payroll. F. Deposits funds (electronically) in client's account. |

12.7.5 Tier II PWEX Subsidized to Unsubsidized

| Step | Who | Action |
|------|---------------------|---|
| 1. | Worksite Supervisor | <p>A. Offers unsubsidized position to client.</p> <p>B. Informs JPR EC of hire.</p> |
| 2. | JPR EC | <p>A. Completes a “Request for Information on Termination of Employment” (SCD 549B) for the position being vacated and sends to IDM.</p> <p>B. Completes “Request for Employment Information” (SCD 549A) for the new position and sends to IDM. Note: The 549A should not have EC Works prefix by the employer name.</p> <p>C. Completes separate TMTs to notify EW, and attaches SCD 549B and then new SCD 549A to update employment information in CalWIN.</p> <p>D. Completes a new WTW 2 for the unsubsidized employment.</p> <p>E. Enters CalWIN Case Comments.</p> <p>F. Updates ECA by completing a new Self Placement screen and by checking “sub to unsub” box. ECA will automatically send an e-mail alert to JPR Supervisor and CM Retention EC.</p> <p>G. Sends an e-mail to CM Retention EC regarding the change.</p> |
| 3. | CM Retention EC | <p>A. Updates CalWIN activities and CalWIN Employment window; and enters case comments. Window must show “Sub” and “Unsub” record to show in DSR report. All dates MUST match. [Refer to “Subsidized to Unsubsidized Reporting,” page 12-11] for list of activities.</p> <p>B. Monitors case throughout the subsidized and 90 day unsubsidized follow-up period.</p> |
| 4. | JPR Supervisor | <p>A. Receives update from ECA indicating client’s position has become unsubsidized.</p> |



Note:

Subsidized to unsubsidized employment occurs within 30 days of the last date of subsidized employment with any employer (does not have to be the same employer) for placement credit purposes.

12.7.6 Tier II PWEX Separations

| Step | Who | Action | |
|------|------------------------------|---|--|
| 1. | Worksite Supervisor & JPR EC | Discuss terms of separation. | |
| 2. | JPR EC | If... | Then... |
| | | client is released from worksite or placement mismatch | <ul style="list-style-type: none"> tries to place client at new Tier I or Tier II worksite per placement processes for remaining months. completes and sends 549B to IDM. completes TMT to notify EW to end employment in CalWIN. notifies Admin Payroll unit. enters case comments in CalWIN and updates ECA. sends an e-mail to CM Retention EC. |
| | | Client quits or is a no show | <ul style="list-style-type: none"> tries to contact client. completes and sends SCD 549B to IDM. completes TMT to notify EW to end employment in CalWIN. submits timesheet to Admin Payroll unit. enters case comments in CalWIN. sends an e-mail to CM Retention EC. |
| 3. | CM Retention EC | A. Calls client to assign next activity, if still on aid. | |



Note:

A conference must be held between the worksite supervisor/employer and the JPR EC before a client is released from the worksite. The client is included, as appropriate.

12.7.7 Tier II Client Work Related Injuries

The following process must be followed for work related injuries.

| Step | Who | Action | |
|------|--------|--|--|
| 1. | JPR EC | A. Communicates with client and reports injury to respective Employment Program Supervisor. | |
| 2. | EPS | A. Contacts client and completes the following worker's compensation paperwork within 24 hours. <ul style="list-style-type: none"> (1) Treatment Authorization form. (2) Employer's Report of Occupational Injury or Illness (State Form 5020). (3) Bottom section of the Worker's Comp Claim Form DWC1. Client completes the top section of the form. (4) Accident or Injury Investigation Report B. Obtain client's signature on completed paperwork. C. Informs client to visit US Healthworks, Alliance or pre-designated physician for an examination. D. Submits completed paperwork to Employee Services Agency (ESA) within 24 hours (instructions on form). E. Informs JPR EC of client's return to work outcome, and submits a copy of completed paperwork to APU for filing. | |
| 3. | JPR EC | If . . . | Then . . . |
| | | Client is approved by doctor to return to work | 1. Maintains contact with worksite supervisor and client to monitor progress. 2. Receives written release from doctor and submits to IDM. 3. Enters CalWIN case comments. 4. E-mails CM Retention EC. |
| | | Client is not approved by doctor to return to work | 1. Informs worksite supervisor that client is not released to return to work. 2. End dates placement in CalWIN. 3. Notifies APU. 4. E-mails CM Retention EC. 5. Completes and sends 549B to IDM. 6. Completes TMT to notify EW. 7. Updates CalWIN case comments and ECA. |

12.8 Job Retention Tier I & Tier II

The job retention process begins when the client shows on the first day of employment and the JPR EC updates ECA. As a result, ECA automatically sends a referral to the JPR EC that the account is assigned to. The assigned EC transfers the case to the CM Retention EC using the SCD 163T to the control clerk. The procedural table below includes steps when transferring from subsidized to unsubsidized employment.

| Step | Who | Action | |
|------|----------|---|---|
| 1. | JPR EC | A. Ensures that client receives subsidized employment orientation, including completion of required forms. [Refer to Chapter 5, "Job Search Client Flow"] for required form. | |
| | | If . . . | Then . . . |
| | | Tier I | orientation includes: emergency contact, employer evaluations, EC responsibilities and client responsibilities. |
| | | Tier II | orientation includes: timesheets, pay periods, work hours, Aline card activation, emergency contact, employer evaluations, EC responsibilities client responsibilities and DocuSign tutorial. |
| | | B. Contacts client and employer within 72 hours of placement to check on progress. C. Ongoing communication/case conferences as needed with assigned CM EC. D. Conducts employer orientation. | |
| 2. | Employer | If . . . | Then . . . |
| | | Tier I | completes monthly evaluation: "Tier 1 Month 1" (SCD 2542) "Tier 1 Month 2" (SCD 2543) "Tier 1 Month 3" (SCD 2544) |
| | | Tier II | completes bi-monthly evaluation: "Paid WEX Month 2" (SCD 2539) "Paid WEX Month 4" SCD 2540) "Paid WEX Month 6" (SCD 2541) |

| Step | Who | Action |
|--|-------------------------|--|
| 3. | JPR EC (Tier I & II) | <p>A. Maintains weekly contact with client involving issues other than payroll or employer relations.</p> <ul style="list-style-type: none"> • After the initial start, an in person visit to the job site should be made at least once a month. Enter follow up results in CalWIN at each 30 days. [Refer to “Follow Up Tab,” page 29-14]. <p>B. Continues contact with client (and employer if needed) throughout subsidized employment to provide coaching and conflict resolution.</p> <p>C. Posts employer evaluations in ECA.</p> <p>D. Case conferences with CM Retention EC and/or client as needed.</p> <p>E. Provides job order received from employer to ECC CST for entry into ECA and job order spreadsheet, if needed.</p> <p>F. Updates ECA and enters CalWIN Case Comments.</p> <p>G. Amends WTW 2 and in CalWIN if activity changes. Note: This step may be the ECC EC, or CM EC, whoever at the point of discovery.</p> <p>H. Updates case comments in CalWIN (Type: Employment Connection).</p> |
| 4. | Assigned CM EC | <p>A. Reviews WTW 2, CalWIN entries, and supportive services.</p> <p>B. Transfers case to CM Retention EC via SCD 163T.</p> |
| <p>Note: For Tier II Adult Education/Community College referrals, [Refer to “Tier II Adult Education/Community College Referrals,” page 12-27].</p> | | |

| Step | Who | Action | | | | | | |
|---|--|---|--------------------|------------|--|--|---|---|
| 5. | CM Retention EC | <p>A. Receives SCD 163T from assigned CM EC.</p> <p>B. Monitors employment attendance and progress through the subsidized employment activity.</p> <p>C. Updates activity to “Satisfactory Progress” upon receipt of first SCD 1755A for EC Works Subsidized Employment Placement.</p> <p>D. Updates the Attendance window in CalWIN (monthly).</p> <p>E. Ensures continuity of any support services needed and/or resource referrals.</p> <p>F. Case conferences with JPR EC to resolve any issues identified and assist with resolutions.</p> <p>G. Updates case comments in CalWIN.</p> <p>H. Sends e-mail to JPR EC of any case status changes or client needs.</p> | | | | | | |
| | | <table border="1"> <thead> <tr> <th data-bbox="542 869 850 915">If client is . . .</th> <th data-bbox="855 869 1511 915">Then . . .</th> </tr> </thead> <tbody> <tr> <td data-bbox="542 921 850 1373">discontinued from cash aid due to subsidized employment income</td> <td data-bbox="855 921 1511 1373"> <ol style="list-style-type: none"> 1. Ends current activity with “Transfer” status. 2. Adds “Post-Aid Services” status with “Mandatory” on the [Registration] tab. 3. Adds new activity “Employed Subsidized PAS EC Works” with start date of PAS. 4. Requests that unit supervisor change to CM Retention EC’s PAS worker number to reflect assigned retention case is in retention period and PAS. 5. Continues to monitor the case for retention services. </td> </tr> <tr> <td data-bbox="542 1379 850 1520">discontinued from cash aid for any other reason during subsidized employment period</td> <td data-bbox="855 1379 1511 1520"> <ol style="list-style-type: none"> 1. Follows Case Closing Procedures. </td> </tr> </tbody> </table> | If client is . . . | Then . . . | discontinued from cash aid due to subsidized employment income | <ol style="list-style-type: none"> 1. Ends current activity with “Transfer” status. 2. Adds “Post-Aid Services” status with “Mandatory” on the [Registration] tab. 3. Adds new activity “Employed Subsidized PAS EC Works” with start date of PAS. 4. Requests that unit supervisor change to CM Retention EC’s PAS worker number to reflect assigned retention case is in retention period and PAS. 5. Continues to monitor the case for retention services. | discontinued from cash aid for any other reason during subsidized employment period | <ol style="list-style-type: none"> 1. Follows Case Closing Procedures. |
| If client is . . . | Then . . . | | | | | | | |
| discontinued from cash aid due to subsidized employment income | <ol style="list-style-type: none"> 1. Ends current activity with “Transfer” status. 2. Adds “Post-Aid Services” status with “Mandatory” on the [Registration] tab. 3. Adds new activity “Employed Subsidized PAS EC Works” with start date of PAS. 4. Requests that unit supervisor change to CM Retention EC’s PAS worker number to reflect assigned retention case is in retention period and PAS. 5. Continues to monitor the case for retention services. | | | | | | | |
| discontinued from cash aid for any other reason during subsidized employment period | <ol style="list-style-type: none"> 1. Follows Case Closing Procedures. | | | | | | | |
| | | <p>I. Sends e-mail to JPR EC of any case status changes.</p> | | | | | | |

| Step | Who | Action |
|---|--------|--|
| From Subsidized Employment to Unsubsidized Employment... | | |
| 6. | JPR EC | <p>A. Completes a "Request for Information on Termination of Employment" (SCD 549B) for the position being vacated and sends to IDM.</p> <p>B. Completes "Request for Employment Information" (SCD 549A) for the new position and sends to IDM. Note: The 549A should not have EC Works prefix by the employer name.</p> <p>C. Completes separate TMTs to notify EW, and attaches SCD 549B and then new SCD 549A to update employment information in CalWIN.</p> <p>D. Completes a new WTW 2 for the unsubsidized employment.</p> <p>E. Enters CalWIN Case Comments.</p> <p>F. Updates ECA by completing a new Self Placement screen and by checking "sub to unsub" box. ECA will automatically send an e-mail alert to JPR Supervisor and CM Retention EC.</p> <p>G. Sends an e-mail to CM Retention EC regarding the change.</p> |

| Step | Who | Action | |
|------|-----------------|---|--|
| 7. | CM Retention EC | <p>If client is . . .</p> <p>on cash aid AND being transferred to unsubsidized employment, same employer</p> | <p>Then. . .</p> <p>A. Updates CalWIN by:</p> <ul style="list-style-type: none"> (1) Ending the applicable current activity with "Transfer" status. (2) Adding the new WTW 2 plan if client is on aid. (3) Entering the applicable employment activity. [Refer to "Subsidized to Unsubsidized Reporting," page 12-11]. <p>B. Monitors the unsubsidized employment period for 90 days.</p> <p>C. Enters employment follow-up in CalWIN at 30, 60 and 90 days.</p> <ul style="list-style-type: none"> (1) Selects "Assessment" button on bottom of Registration window. (2) Double clicks on appropriate employment information. (3) Selects "Employment Detail" button on bottom of window. (4) Selects [Follow-up] tab. (5) Enters follow-up date, follow-up method and follow-up status. <p>D. Reviews CalWIN to ensure each employment interval has been entered.</p> <p>E. Conducts employment follow-up to determine if client is employed at 30, 60 and 90 days.</p> <p>F. Updates CalWIN to reflect each employment interval.</p> <p>G. After 90 days of unsubsidized employment and follow-up has been completed, submits the SCD 163T to unit supervisor for approval to transfer to control clerk CST for continuing case management.</p> <p>H. Updates case comments in CalWIN.</p> |

| Step | Who | Action |
|------|-----------------|---|
| 8. | JPR EC | <p>on cash aid AND being transferred to unsubsidized employment, different employer</p> <ul style="list-style-type: none"> A. Completes a “Request for Information on Termination of Employment” (SCD 549B) for the position being vacated and sends to IDM. B. Completes “Request for Employment Information” (SCD 549A) for the new position and sends to IDM. Note: The 549A should not have EC Works prefix by the employer name. C. Completes separate TMTs to notify EW, and attaches SCD 549B and then new SCD 549A to update employment information in CalWIN. D. Completes a new WTW 2 for the unsubsidized employment. E. Enters CalWIN Case Comments. F. Updates ECA by completing a new Self Placement screen and by checking “sub to unsub” box. ECA will automatically send an e-mail alert to JPR Supervisor and CM Retention EC. G. Sends an e-mail to CM Retention EC regarding the change. |
| 9. | CM Retention EC | <ul style="list-style-type: none"> A. Ends current subsidized employment activity with “Transfer” status. B. Adds new applicable employment activity.[Refer to “Subsidized to Unsubsidized Reporting,” page 12-11]. C. Follow Steps 7C to 7F on page 12-45. D. Updates case comments in CalWIN. |

| Step | Who | Action |
|------|-----------------|--|
| 10. | JPR EC | <p>off cash aid AND being transferred to unsubsidized employment, same employer or different employer</p> <ul style="list-style-type: none"> A. Completes a “Request for Information on Termination of Employment” (SCD 549B) for the position being vacated and sends to IDM. B. Completes “Request for Employment Information” (SCD 549A) for the new position and sends to IDM. Note: The 549A should not have EC Works prefix by the employer name. C. Completes separate TMTs to notify EW, and attaches SCD 549B and then new SCD 549A to update employment information in CalWIN. D. Completes a new WTW 2 for the unsubsidized employment. E. Enters CalWIN Case Comments. F. Updates ECA by completing a new Self Placement screen and by checking “sub to unsub” box. ECA will automatically send an e-mail alert to JPR Supervisor and CM Retention EC. G. Sends an e-mail to CM Retention EC regarding the change. |
| 11. | CM Retention EC | <ul style="list-style-type: none"> A. Ends current subsidized employment activity with “Transfer” status. B. Adds “Post-Aid Services” status with “Mandatory” on the [Registration] tab. C. Adds applicable new employment activity. [Refer to “Subsidized to Unsubsidized Reporting,” page 12-11]. D. Completes Steps 7C through 7F on page 12-45. E. After 90 days of unsubsidized employment and follow-up has been completed, prepares the SCD 163T and notes balance of time remaining in PAS 12 month period. F. Submits SCD 163T to unit supervisor for approval for case transfer to PAS Unit. G. Updates case comments in CalWIN. |

| Step | Who | Action |
|------|-----------------|---|
| 12. | JPR EC | <p>ends subsidized employment activity with no unsubsidized employment and is on cash aid</p> <ul style="list-style-type: none"> A. Obtains SCD 549B. B. Creates TMT to notify assigned EW to end employment. C. Enters case comments in CalWIN. D. Notifies CM Retention EC. |
| 13. | CM Retention EC | <ul style="list-style-type: none"> A. Receives notification from JPR EC. B. Determines next activity for client. C. Reviews next activity with client and completes WTW 2. D. Provides copy of WTW 2 to client. E. Updates CalWIN. <ul style="list-style-type: none"> (1) Ends employment activity and closes plan. (2) Enters new plan and next activity. (3) Enters case comments. F. Forwards new WTW 2 to IDM. G. Prepares the case for transfer to Control Clerk CST for continuing case management assignment. |
| 14. | CM Retention EC | <p>ends subsidized employment activity with no unsubsidized employment and is off cash aid</p> <ul style="list-style-type: none"> A. Follows case closing procedures. |

12.9 Tier III - Subsidized College Work Study

Tier III subsidizes College Work Study at participating community colleges. These positions are administered and paid for by the community college. The CalWIN activity name is “Sub. College Work Study”.



Note:

Not all work study positions at participating community colleges will be funded by expanded subsidized employment. Community College Liaisons will only submit a “Schedule A” (SCD 2466) to ESI if the placement is subsidized.

12.9.1 Tier III Wages, Hours and Participation

Wages, hours and length of employment are determined by the community college. Clients are paid directly. Earnings from all work study positions is exempt and is not counted for the purpose of determining eligibility for public assistance.

12.9.2 Tier III Agreements, Placement and Invoicing

The provisions, work plan and budget for Tier III, Subsidized College Work Study, are incorporated into the Community College Liaison Services agreement. All negotiations, general planning, correspondence, signatory process and execution are managed by the ESI unit as part of the unit's annual agreement cycle. Agreement terms adhere to the County's fiscal year term and operate from July 1st through June 30th. Assignments must be twelve (12) months.

Participating colleges determine the rate at which they are reimbursed and are responsible for client recruitment, placement and determination of student wage rates (earnings vary by position and skills requirement).

12.9.3 Tier III New Placement Process

| Step | Who | Action |
|------|---------------------------|--|
| 1. | Community College Liaison | <p>A. Submits "Schedule A" (SCD 2466) to ESI for approval.</p> <p>B. Forwards WTW 2 and TBA to assigned CM EC.</p> |
| 2. | ESI | <p>A. Reviews "Schedule A" (SCD 2466) for accuracy.</p> <p>B. Obtains approval of "Schedule A" (SCD 2466) from the authorized county official for new placements.</p> <p>C. Forwards WTW 2 and class schedule to assigned CM EC.</p> |
| 3. | CWES SSPM | A. Forwards approved "Schedule A" (SCD 2466) to assigned CM EC. |
| 4. | Assigned CM EC | <p>A. Receives "Schedule A" (SCD 2466).</p> <p>B. Amends the WTW 2 to add work study if work study is not part of the WTW 2.</p> <p>C. Adds "Work Study" activity, if not in CalWIN.</p> <p>D. Adds "Sub. College Work Study" activity in CalWIN.</p> <p>Note: Both work study activities [Start] and [End] dates must match "Schedule A" (SCD 2466) dates and activity statuses.</p> <p>E. Creates TMT/notifies assigned Eligibility Worker (EW) and attaches a copy of the "Schedule A" (SCD 2466) for EW to record the work study as exempt income and update the Employment Detail Window in CalWIN.</p> <p>F. Forwards "Schedule A" (SCD 2466) to IDM.</p> <p>G. Updates case comments in CalWIN.</p> |
| 5. | Assigned CM EC | <p>A. Confirms EW entered information in CalWIN within 3 days.</p> <p>B. Updates "funding" type (profit/nonprofit) per ["Employment Retention Services," page 29-10] of CWES Handbook Chapter 29.</p> |
| 6. | Community College Liaison | A. Submits an invoice to ESI by the 10th day of the following month. |
| 7. | ESI | <p>A. Receives invoice.</p> <p>B. Reviews for accuracy.</p> <p>C. Processes invoice.</p> |

12.9.4 Tier III Schedule A (SCD 2466) Change

| Step | Who | Action |
|------|---------------------------|--|
| 1. | Community College Liaison | A. Receives "Schedule A" (SCD 2466) with Revision box checked. |
| 2. | ESI | A. Reviews "Schedule A" (SCD 2466) for accuracy. B. Obtains approval of "Schedule A" (SCD 2466)" from the authorized county official. C. Forwards copy of approved "Schedule A" (SCD 2466) to designated CWES SSPM and Community College Liaison. |
| 3. | CWES SSPM | A. Forwards approved "Schedule A" (SCD 2466) to assigned CM EC. |
| 4. | Assigned CM EC | A. Receives "Schedule A" (SCD 2466) with Revision box checked. B. Creates TMT to notify EW if needed. C. Reviews WTW 2 and amends if needed. D. Updates CalWIN and enters case comments. Note: Only "Schedule A" (SCD 2466) changes approved by ESI are to be processed. Do NOT process "Schedule A" (SCD 2466) changes received directly from community college liaisons. |

Notes:

- a. If WTW plan is current, extend End Date for "Sub. College Work Study" and work study activities in CalWIN. Do not enter new, or change original date.
- b. If the WTW 2 plan has ended and the Subsidized College Work Study continues, end the activity with "Transfer" status. Add a new WTW 2 plan in CalWIN and re-enter the activity. The new plan will retain the original Actual Start Date (original placement date). Enter the new End Date for the Subsidized College Work Study Activity.
- c. IDM the revised "Schedule A" (SCD 2466) form.

12.10 WTW Plan

A new Welfare-to-Work (WTW) plan must be signed when a client enters into subsidized employment or unsubsidized employment from JC, SJS, or PTJS.

Refer to [\[Refer to "Welfare-to-Work \(WTW\) Plan," page 9-1\]](#).

12.11 WTW Participants Approaching 42 Months

Case Management (CM) ECs provide outreach to WTW participants who are approaching 42 months of their CalWORKs 48-month Time On Aid (TOA) and are referred to subsidized employment as follows:

- Reviews monthly report listing “CW TOA Approaching 42 Months,” (DSR506952), which is provided to the CM EC by designated staff.
- Reviews listing and client’s current WTW Plan to determine if subsidized employment is an appropriate activity.
- Mails “Subsidized Employment Program Informational Letter/Flier” (SCD 2467) to clients who may benefit from subsidized employment.
- 1 to 2 weeks after SCD 2467 is mailed, contacts client by phone to discuss the benefits of the subsidized employment program.
- If client is interested, instructs client to call the number on the letter/flier to schedule an appointment or instructs client to go to the ECC, and informs client to continue participating in his/her current WTW plan.
- Upon an offer of employment, meets with client to amend or create new WTW plan, adding subsidized employment activity as follows:
 - ECC EC adds Tier I or Tier II activity if client is active on CalWORKs.
Note: Individuals who are discontinued due to earnings are eligible to remain in the Tier I/Tier II activity through the duration of the placement period.
 - If client becomes timed-out from CalWORKs 48-month TOA during subsidized employment period, ends the Tier I/Tier II activity and follows Timed-Out procedures [[Refer to “Safety Net \(48-Month Timed-Out\) Individuals,” page 12-50](#)].
- Assigns and authorizes supportive services.
- Follows existing case management procedures.

Reminder: A client is eligible for subsidized employment if he or she is discontinued from CalWORKs cash aid due to earnings or due to timing-out from the 48 month TOA.

12.12 Safety Net (48-Month Timed-Out) Individuals

Safety Net individuals are eligible for subsidized employment placements.

12.12.1 CalWIN Activities

The following is used in CalWIN for Safety Net subsidized employment program participants:

- WTW Activity Name: “Safety Net EC Works Sub Empl”
- Provider Name: “CWES 1879 Senter Road”

To track positive completions, “Safety Net EC Works Unsub Empl” activity is added when client goes from subsidized to unsubsidized employment within 30 days.

12.12.2 Registration Status

Safety Net individuals participating in the “Safety Net EC Works Sub Empl” activity are manually registered in the **Maintain Employment Services Participation** window in CalWIN using one of the two WTW registration statuses as follows:

- Select “Timed-Out (Post Aid)” for participants who have timed-out from their CalWORKs 48-month TOA **within 12 months** of date of subsidized employment placement.
Note: These participants are eligible for Post Aid Services.
- Select “Timed-Out (Safety Net)” for participants who have timed-out from their CalWORKs 48-month TOA **more than 12 months** from date of subsidized employment placement.
Note: These participants are not eligible for Post Aid Services.

12.12.3 Supportive Services

Safety Net individuals are eligible for Post Aid Services (PAS) provided they are placed into subsidized employment within 12 months from the date of discontinuance from CalWORKs for reason of timing-out from their 48 month Time on Aid (TOA).

Example 1:

Individual is discontinued due to timing out effective 1/31/17. She is placed into a subsidized job on 5/1/17. The client is eligible for PAS beginning 5/1/2017 through 4/30/18, because the job placement date is within 12 months from discontinuance date.

Example 2:

Individual is discontinued due to timing out effective 3/31/16. He is placed into a subsidized job on 5/1/17. Client is **Not** eligible for PAS, because he has been discontinued for more than 12 months prior to placement date.

Child Care

When there is a need for child care, the CM EC makes a direct referral to the Alternative Payment Provider (APP) for enrollment in child care following existing APP procedures.

12.12.4 Outreach and Placement

Designated staff provide outreach to Safety Net individuals. Outreach efforts include mailing “Subsidized Employment Program Informational Letters/Fliers” (SCD 2467) at designated intervals followed up by phone call to explain program and enrollment process. The steps below outline the outreach process:

| Step | Who | Action |
|------|-------------------|--|
| 1. | CWES MA | <p>A. In coordination with Central Services and Program, mails “Subsidized Employment Program Informational Letter/Flier” (SCD 2467) to Safety Net individuals at designated intervals.</p> <p>B. 1 to 2 weeks after SCD 2467 is mailed, distributes the “CalWORKS TOA Approaching 42 Months” (DSR506952) listing to designated ECC EC Supervisor.</p> |
| 2. | ECC EC Supervisor | <p>A. Receives and splits the listing by ECC ECs.</p> <p>B. Forwards listings to ECC ECs for telephone outreach follow-up.</p> |

| Step | Who | Action | |
|-----------------------|---|--|---|
| 3. | ECC EC | <p>A. Calls individuals from listing, making at a minimum two phone call attempts.</p> <p>B. References the SCD 2467 letter/flier and explains to the client the benefits of subsidized employment.</p> <p>C. Selects Employment Connection case comment type and documents the outcome of the phone call using the following verbiage as leading sentence of the comment, "Timed Out Subsidized," <u>followed by the outcome</u>. Example: "Timed Out Subsidized: Client interested and will drop-in on May 5 at the ECC."</p> | |
| | | If client . . . | Then . . . |
| | | agrees to participate | <ol style="list-style-type: none"> 1. Informs client to drop-in at the ECC during regular business hours to meet with designated ECC EC. 2. Prepares client for job interview. 3. Refers client to work site. 4. When selected for position, enters case comments in CalWIN and coordinates with PAS unit supervisor/lead who will assign case to appropriate caseload tracking ID based on support services eligibility: <ul style="list-style-type: none"> • Selects "Timed Out (Post Aid)" or "Timed Out Safety Net" status from the WTW [Registration] tab with an effective begin date the first day of the job placement month. • Refers and schedules "Safety Net EC Works Sub Empl" activity for up to 6 months outside the WTW Plan in CalWIN, using provider "CWES 1879 Senter Rd". Note: WTW 2 is not required for individuals in Safety Net. 5. Obtains "Schedule A" (SCD 2466) for subsidized employment and "Request for Employment Information" (SCD 549A) for unsubsidized employment from employer and updates activity status to first day attendance (FSTD). 6. If client is a parent in a 2-Parent case, notifies the CM EC who will provide case management services (Refer to Step 5, beginning with 5-B2 or 5-B10 on next page). |
| does not participate, | 7. Informs individual to contact the ECC in the future. | | |

| Step | Who | Action | | | | |
|-------------------------------------|--|---|-------------------------------------|------------|----------------------|--|
| 4. | PAS EC | <p>A. If eligible for Post Aid Services:</p> <ul style="list-style-type: none"> (1) Discusses requirement to submit monthly SCD 1755A along with pay check stubs. (2) Assigns and approves supportive services for 6 months. (3) Issues supportive services for the current month. <p>B. If CalWORKs timed-out date is more than 12 months from current date:</p> <ul style="list-style-type: none"> (1) Client is not eligible for Post Aid Services (2) The ECC EC follows Steps 3-D1 through 3-D6 on previous page. (3) The CM EC or PAS EC follows Steps 5-B2 through 5-B9 below. | | | | |
| 5. | PAS Unit Staff | <p>A. Receives Case Transfer from ECC EC staff.</p> <p>B. Assigns case to designated A9 Unit caseload Tracking ID.</p> <table border="1" data-bbox="431 865 1520 1348"> <thead> <tr> <th data-bbox="431 865 766 949">If WTW Registration Status is . . .</th> <th data-bbox="766 865 1520 949">Then . . .</th> </tr> </thead> <tbody> <tr> <td data-bbox="431 949 766 1348">Timed Out (Post Aid)</td> <td data-bbox="766 949 1520 1348"> <ul style="list-style-type: none"> 1. Assigns to A9PS Caseload Tracking ID. 2. Processes first SCD 1755A, updates activity status to "Satisfactory Progress" if still employed, and issues supportive services. 3. At 30, 60 and 90 days after job placement, performs employment follow-up and updates Collect Employment Information, [Follow Up] Tab in CalWIN with appropriate Follow Up Status. 4. Continues to process monthly SCD 1755A, update activity status, and issue supportive services. </td> </tr> </tbody> </table> | If WTW Registration Status is . . . | Then . . . | Timed Out (Post Aid) | <ul style="list-style-type: none"> 1. Assigns to A9PS Caseload Tracking ID. 2. Processes first SCD 1755A, updates activity status to "Satisfactory Progress" if still employed, and issues supportive services. 3. At 30, 60 and 90 days after job placement, performs employment follow-up and updates Collect Employment Information, [Follow Up] Tab in CalWIN with appropriate Follow Up Status. 4. Continues to process monthly SCD 1755A, update activity status, and issue supportive services. |
| If WTW Registration Status is . . . | Then . . . | | | | | |
| Timed Out (Post Aid) | <ul style="list-style-type: none"> 1. Assigns to A9PS Caseload Tracking ID. 2. Processes first SCD 1755A, updates activity status to "Satisfactory Progress" if still employed, and issues supportive services. 3. At 30, 60 and 90 days after job placement, performs employment follow-up and updates Collect Employment Information, [Follow Up] Tab in CalWIN with appropriate Follow Up Status. 4. Continues to process monthly SCD 1755A, update activity status, and issue supportive services. | | | | | |

| Step | Who | Action |
|--|----------------------------------|---|
| 5. (cont) | Designated PAS Unit Staff (cont) | <p>If WTW Registration Status is . . . (cont)</p> <p>Timed Out (Post Aid) (cont)</p> |
| | | <p>Timed-Out Safety Net</p> |
| <p>5. When client is no longer employed:</p> <ul style="list-style-type: none"> • Updates activity status with “Completed.” • Ends supportive services assignment. • Ends “Timed Out” (Post Aid) registration status. • Adds “Ineligible” Registration status the first of the month, following end of employment. <p>6. When client goes from subsidized employment to unsubsidized employment within 30 days of subsidized employment ending, refers and schedules “Safety Net EC Works Unsub Empl” and continues retention services per existing procedures, and follows Step 5-B5 on previous page.</p> <p>7. Closes case at the conclusion of retention period per existing procedures.</p> <p>8. Enters case comments.</p> <p>9. Assigns to A9PN Caseload Tracking ID.</p> <p>10. At 30, 60 and 90 days after job placement, performs employment follow-up and updates Collect Employment Information, [Follow Up] Tab in CalWIN with appropriate Follow Up Status.</p> <p>11. Updates activity status to “Satisfactory Progress” if still employed.</p> <p>12. When client is no longer employed:</p> <ul style="list-style-type: none"> • Updates activity status with “Completed.” • Ends “Timed Out Safety Net” Registration status. • Adds “Ineligible” Registration status the first of the month, following end of employment. <p>13. When client goes from subsidized employment to unsubsidized employment within 30 days of subsidized employment ending, refers and schedules “Safety Net EC Works Unsub Empl” and continues retention services per existing procedures, and follows Step 5-B12 above on this page.</p> <p>14. Closes case and enters case comments.</p> | | |
| <p>Reminder: CalWORKs Safety Net participants in a two-parent household are to be case-managed by the CM EC beginning with Steps 5-B2 through 5-B8; or Steps 5-B10 through B14 above.</p> | | |

12.13 Sexual Harassment

Refer to the County of Santa Clara [sexual harassment](#) policy for detailed information on what is considered sexual harassment.

If a Tier I, Tier II or WEX participant, when the County is the employer of record, reports an incident of sexual harassment, the following process must be followed.

| Step | Who | Action | |
|------|--------------------|--|--|
| 1. | Any EC | <ul style="list-style-type: none"> Documents the reported allegation of sexual harassment. Communicates to the alleged victim that the county takes the complaint seriously, is taking action accordingly and will keep him/her updated with any developments. Removes client from worksite. Notifies the Employment Program Supervisor (EPS), Admin Payroll unit, and SSPM of the incident. Notifies EPS to flag worksite. | |
| 2. | EPS | <ul style="list-style-type: none"> Flags worksite in ECA to suspend new placements. | |
| 3. | APU | <ul style="list-style-type: none"> Drafts formal notice, to be reviewed and approved by county counsel, to worksite supervisor to inform him/her of the reported allegation of sexual harassment and requests a review of the incident. Mails formal notice via certified mail after review and approval by county counsel. | |
| 4. | Worksite Manager | <ul style="list-style-type: none"> Conducts impartial investigation/review of reported sexual harassment and provides update to county within two weeks. | |
| 5. | EPM/APU Supervisor | If . . . | |
| | | worksite manager does not respond | <ul style="list-style-type: none"> drafts letter for review by county counsel to end the agreement. after review and approval by county counsel, ends the agreement. updates worksite in ECA. |
| | | worksite manager responds | <ul style="list-style-type: none"> EPM/APU supervisor provides a response to worksite manager. based on response, determines if agreement should be continued, suspended or ended. updates worksite in ECA. |

12.14 Transitional Subsidized Employment (TSE)

12.14.1 Definition

TSE is subsidized employment sponsored by County of Santa Clara Social Services Agency (SSA) where the wages are subsidized to the employer. TSE is a short-term activity for up to two (2) months that meets the core activity requirement, and is primarily used for participants who are selected for the federal Work Participation Rate (WPR) review sample.

12.14.2 Overview

SSA provides worksite development at private/non-profit employers throughout Santa Clara County. The employer of record is the worksite.

12.14.3 Wages, Hours and Participation

The hourly wage paid to TSE participants must be equivalent to or higher than the minimum wage of the worksite city. Participants work from 20 to 40 hours per week in short-term, temporary employment. Since the employment is short-term, the earnings cannot be reasonably anticipated to be received in the future. For the purpose of determining eligibility for public assistance programs, the income is not counted.



Note:

TSE is not subject to Fair Labor Standards Act (FLSA) calculations since participants are paid wages subject to payroll deductions.

12.14.4 TSE Services

The Rapid Response Team (RRT) EC screens clients to ensure they meet program requirements. The RRT EC meets with clients to provide job placements matching the participant's interests and experience with the requirements of the worksite. The participant is informed of the requirements for the position and provided assistance for a successful completion of the work assignment. The RRT EC issues a copy of the worksite referral and SCD 549B with the start and end date to the client.

12.14.5 Minimum Client Requirements

At the point of referral, TSE participant must be part of an Assistance Unit that is receiving CalWORKs and meet the following minimum requirements:

- Have a valid California Driver’s License, ID, or original birth certificate, and social security card
- In between activities/waiting for next activity to become available
- Selected for the federal WPR review sample

12.14.6 Referrals

Clients who benefit from TSE are referred to the program by any EC. Referrals are made by contacting RRT. RRT staff meet with the client to provide program information and direct referrals to worksites.

:

| Step | Who | Action | | | | | | |
|--|---|--|-----------------|---------|--|---|-----------------|--|
| 1. | Referring EC | <ul style="list-style-type: none"> • Reviews temporary TSE program and criteria with the client. <table border="1"> <thead> <tr> <th>If client is...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Interested and meets minimum requirements,</td> <td> <ul style="list-style-type: none"> • Contacts RRT EC to schedule a same day appointment for the client. • Escorts client to a RRT EC or informs client of appointment date and time, if client cannot be seen the same day. </td> </tr> <tr> <td>Not interested,</td> <td> <ul style="list-style-type: none"> • Refers client to the next activity per established procedures. </td> </tr> </tbody> </table> | If client is... | Then... | Interested and meets minimum requirements, | <ul style="list-style-type: none"> • Contacts RRT EC to schedule a same day appointment for the client. • Escorts client to a RRT EC or informs client of appointment date and time, if client cannot be seen the same day. | Not interested, | <ul style="list-style-type: none"> • Refers client to the next activity per established procedures. |
| If client is... | Then... | | | | | | | |
| Interested and meets minimum requirements, | <ul style="list-style-type: none"> • Contacts RRT EC to schedule a same day appointment for the client. • Escorts client to a RRT EC or informs client of appointment date and time, if client cannot be seen the same day. | | | | | | | |
| Not interested, | <ul style="list-style-type: none"> • Refers client to the next activity per established procedures. | | | | | | | |

| Step | Who | Action | | | | | | |
|--|---|--|-----------------|------------|--------------------|---|--|---|
| 2. | RRT EC | <ul style="list-style-type: none"> • Meets with client and screens for job placement. <table border="1" data-bbox="461 323 1494 989"> <thead> <tr> <th data-bbox="461 323 760 373">If client . . .</th> <th data-bbox="760 323 1494 373">Then . . .</th> </tr> </thead> <tbody> <tr> <td data-bbox="461 373 760 907">agrees to the job,</td> <td data-bbox="760 373 1494 907"> <ul style="list-style-type: none"> • Places the client with the employer. • Completes internal WPR RRT TSE referral and “Request for Employment Information/Termination of Employment” (SCD 549B), with start date and last day of employment. • Issues copy of SCD 549B to client along with information on reporting discontinued income. • Issues TSE Referral form to the referring EC. • Refers client back to the referring EC to complete the “Welfare to Work Plan Activity Assignment” (WTW 2). • Submits SCD 549B to IDM. • Notifies referring EC of client first day attendance (FSTD), “No Show” or if there is a change of the employment end date, or any other changes. </td> </tr> <tr> <td data-bbox="461 907 760 989">Does not agree to the job or no match found,</td> <td data-bbox="760 907 1494 989"> <ul style="list-style-type: none"> • Refers client back to referring EC. </td> </tr> </tbody> </table> <ul style="list-style-type: none"> • Updates CalWIN case comments, as appropriate. | If client . . . | Then . . . | agrees to the job, | <ul style="list-style-type: none"> • Places the client with the employer. • Completes internal WPR RRT TSE referral and “Request for Employment Information/Termination of Employment” (SCD 549B), with start date and last day of employment. • Issues copy of SCD 549B to client along with information on reporting discontinued income. • Issues TSE Referral form to the referring EC. • Refers client back to the referring EC to complete the “Welfare to Work Plan Activity Assignment” (WTW 2). • Submits SCD 549B to IDM. • Notifies referring EC of client first day attendance (FSTD), “No Show” or if there is a change of the employment end date, or any other changes. | Does not agree to the job or no match found, | <ul style="list-style-type: none"> • Refers client back to referring EC. |
| If client . . . | Then . . . | | | | | | | |
| agrees to the job, | <ul style="list-style-type: none"> • Places the client with the employer. • Completes internal WPR RRT TSE referral and “Request for Employment Information/Termination of Employment” (SCD 549B), with start date and last day of employment. • Issues copy of SCD 549B to client along with information on reporting discontinued income. • Issues TSE Referral form to the referring EC. • Refers client back to the referring EC to complete the “Welfare to Work Plan Activity Assignment” (WTW 2). • Submits SCD 549B to IDM. • Notifies referring EC of client first day attendance (FSTD), “No Show” or if there is a change of the employment end date, or any other changes. | | | | | | | |
| Does not agree to the job or no match found, | <ul style="list-style-type: none"> • Refers client back to referring EC. | | | | | | | |
| 3. | Referring EC | <ul style="list-style-type: none"> • Meets with client to complete and sign WTW 2 to include TSE activity for placement period, along with next activity and/or sequential activity(ies), as appropriate. • Refers and schedules “TSE Transitional Subsidized Emp” activity within the [WTW Plan] tab, using CalWIN provider: <i>CWES 1879 Senter Road</i>. • Assigns and authorizes supportive services, as appropriate. • Updates CalWIN TSE activity status with “Completed” when job ends, or with an appropriate activity status. • Processes SCD 1755A and SCD 1755B (if needed) and enters actual hours in [Attendance] tab. • If notified by RRT EC of any changes to placement end date, updates activity status to reflect the change. • Enters CalWIN case comments. | | | | | | |
| 4. | Worksite | <ul style="list-style-type: none"> • After completion of assignment, updates 549B with: <ul style="list-style-type: none"> • Final check information • Total earnings • Signature and date | | | | | | |

**Note:**

When referrals to TSE are initiated through the ECC or Assessment, the referring EC notifies the assigned Case Management EC of the placement and requests the setup of supportive services for the duration of the TSE activity.

12.14.7 Supportive Services

TSE participants receiving CalWORKs cash assistance are eligible for all supportive services.

12.14.8 Monitoring Progress and Attendance

Active CalWORKs WTW participants are required to submit their “Attendance Verification” (SCD 1755A) indicating participation in all activities, including TSE. When child care is authorized, pay check stubs are required to pay child care, as well as form “Child Care Billing” (SCD 1755B).

When client participates in a job search activity, the “Job Search Activity Log” (SCD 2534) is completed weekly.

RRT staff will notify the assigned EC when there are any issues with participation.

12.14.9 Participation Problems

If a client stops attending or begins to have other participation problems, worksite staff will report the participation problem to RRT staff for immediate assistance to re-engage client in TSE.

RRT staff notifies assigned EC to begin the non-compliance process when client fails to comply with TSE, or becomes non-compliant.

12.14.10 Employment Verification

Since employment is short-term with an anticipated job placement end date, the “Request for Information on Termination of Employment” (SCD 549B) is completed to verify employment information, including start and end dates.

12.14.11 CalWIN

The activity that is referred in CalWIN by the assigned EC is “TSE Transitional Subsidized Empl”. When scheduling the TSE activity, the CalWIN provider, “CWES 1879 Senter Road” is selected.

The TSE activity is assigned within the [WTW] Plan tab. This activity counts as core hours and actual hours are entered by the assigned EC in the [Attendance] tab.

12.15 Cal-OAR

The California Outcomes and Accountability Review (Cal-OAR) includes the Subsidized to Unsubsidized Employment Rate (percentage). The measure Denominator are participants who exited Subsidized Employment in the measurement quarter. Ensure that when client ends the activity grouping type of Subsidized Employment, that the activity status of “Complete” is entered in order for the Actual End Date to become recorded.

The information that informs the measure Numerator is when the activity grouping type of Unsubsidized Employment is scheduled in the **Maintain Participant** window within a 3 quarters from the completion of the Subsidized Employment activity type. Data from clients who are no longer receiving cash aid will be obtained via a data match with EDD.