

25. Transportation-Related Expenses

Santa Clara County provides maximum supportive services to clients to assist their efforts towards becoming self-sufficient. Transportation-Related Expenses (TRE) are available to cover public transportation such as, adult and youth bus fare, train fare, adult and youth bus passes. TRE is also provided for car pool expenses, mileage reimbursement, and parking fees.

25.1 VTA Trip Planning

VTA provides trip planning information via their Trip Planning Tool: <http://tripplanner.vta.org/planner>

The tool helps explore best travel options. It allows multi modal transportation options, and includes inter-modal trip planning, i.e. one trip using bicycling and transit combined. Real time vehicle information is included in the trip details for those vehicles in the trip.

25.2 Policy [EAS 42-750.11, 42-750.112, 42-750.721]

CalWORKs Employment Services (CWES) Workers MUST:

- Make transportation-related expense payments available to every client and/or child(ren).
- Inform clients, during Orientation, that TRE is available.
- Complete WTW Program Information checklist to document that client was informed about transportation, and other program requirements.

Transportation-Related Expenses must be verbally offered to all clients as follows:

- During CWES Orientation.
- When entering into a new approved activity.
- When the client's cash aid discontinues and the client is eligible for "post-aid" services.
- For accepting or retaining employment.
- Upon the client's request to participate

Clients who are paid a mileage reimbursement must be paid actual miles driven to and from the approved activity, child care provider and home.

**Reminder:**

Per State statute, transportation-related expenses may not include a “cap” (set a specific limit, maximum or ceiling) or maximum monthly reimbursement amount, beyond which additional miles driven are not reimbursed.

25.3 Rule

25.3.1 Transportation-Related Expenses Criteria

Transportation costs, including parking fees, may be paid for the following:

- CWES clients who travel to and from a CWES approved welfare-to-work activity.
- Children, between home, school and/or the child care provider if reasonable and necessary.
- Clients and/or children who participate in additional welfare-to-work programs and services, such as family conferences, etc.
- Post-aid clients.

Transportation services are not paid if:

- Provided by another source
- The self-employed client claims mileage as a business expense deduction
- Transportation expenses are a result of travel required on the job.

**Example:**

A client is employed as a pizza delivery driver, and is required to drive his/her own vehicle and pay for his/her gas. Mileage reimbursement is approved ONLY for miles driven between home and place of employment (pizza parlor). The miles traveled during the day to make the deliveries are NOT covered by mileage reimbursement.

25.3.2 TRE for Children

Transportation costs may be paid to transport the child between home, school and/or the child care provider. Child care providers who charge for transporting a child between school and the provider, must be paid as long as the cost of child care, including transportation is at or below the Regional Market Rate (RMR).

**Note:**

TRE is available for children not in the assistance unit but related to the client by blood, marriage or court decree, and transportation is needed for the individual to participate in welfare-to-work activities.

25.3.3 Proration Eliminated

Effective immediately, adult and youth bus fare is no longer prorated. All clients approved for adult and youth bus fare receive the FULL amount for the month.

25.3.4 Required Form(s)

To request reimbursement for mileage, parking, or car pool fees, clients will be required to provide the "Reimbursement Request for Transportation-Related Expenses" SCD 1799-A. The SCD 1799-A is due by the 5th day of the month.

25.3.5 Advance Payments

Advance payments for TRE must be issued to the client when necessary and/or desired by the client so that the client need not use personal funds to pay for this expense.

25.3.6 Unclear TRE Requests

CWES workers must contact the client within 5-working days of receipt of the TRE request when clarification is needed to issue TRE. CWES Workers must document the contact and the outcome of the contact in **Maintain Case Comments** window in CalWIN.

25.3.7 Distance to School

There is not a minimum distance requirement to a child's school before issuing TRE on behalf of a child.

25.3.8 School Bus Availability

Clients are not required to provide verification that a school bus is not available to transport the child(ren) to issue TRE. The client's statement about school bus availability will satisfy the requirement to request TRE on behalf of a child(ren).

25.3.9 Transportation as a Self-Employed Deduction

TRE payments are not approved when a self-employed client claims mileage as a business expense deduction. If the client does not claim mileage as a business expense deduction, the client is eligible for TRE payments.

Example 1:

A client is a self-employed hairdresser who rents a chair at a business location. The client does not claim mileage as a business expense deduction. The client is eligible for TRE. The client can claim mileage from home to the hair salon and from the hair salon to home.

Example 2:

A client is a self-employed gardener. The client drives to various locations and claims mileage as a business expense deduction. The client is not eligible for TRE.

To verify if a client is claiming mileage as a business expense deduction, the Employment Counselor must ask the client if they are claiming mileage as a business expense deduction and document the client's response in CalWIN **Maintain Case Comments**.

If client . . .	Then client . . .
Is claiming mileage as a business expense deduction	Is not eligible for TRE.
Is not claiming mileage as a business expense deduction	Is eligible for TRE and completes a General Affidavit (SCD 101) or provides other verification that they are not claiming mileage as a business expense deduction.

25.4 Cal-OAR Measure

The California Outcomes and Accountability Review (Cal-OAR) includes the Transportation Provision Timeliness Rate (percentage). The EC completes the CalWIN [Supportive Services] tab located within the **Maintain Employment Plan** window as follows when a plan is created or amended:

- Select a Transportation Type from the **Available** group box.
- Click the [Add>] tab, which moves the Transportation to the **Selected** group box (from the left to the right).
- Click on the save button.

**Note:**

The numerator is the number of WTW participants who received (authorized from **Assign Transportation Supportive Service** window) at least one transportation service within one quarter of CalWORKs cash aid approved.

25.5 Payments

An INITIAL payment equal to the monthly bus pass is advanced to client who choose to drive their own vehicle or car pool, and are otherwise eligible.

To request monthly reimbursement for actual mileage, parking fees, or car pool fees, clients must submit the “Reimbursement Request for Transportation-Related Expenses” SCD 1799-A on a monthly basis. The SCD 1755 and SCD 1799-A, for the prior month, is due by the 5th of the current month.

CWES Workers must provide the client with a supply of SCD 1799-A’s if the client’s mode of transportation is car pool or driving their own vehicle.

The SCD 1755 is due by the 5th of the month. If the SCD 1755 is not received by the 11th day of the month, the CWES Worker must make a cause determination. TRE payments must not be denied or delayed due to lack of an SCD 1755, unless the CWES Worker has information that the individual stopped participating.

Transportation-Related Expenses (TRE) payment to cover public transportation such as, adult and youth bus fare, train fare, adult and youth bus passes is advanced to the client.

25.5.1 Issuance Time Frames

Ongoing TRE advance payment must be issued at least seven 7-working days prior to the end of the current month for the future month. Reimbursement payments must be processed within 20 calendar days from receipt of the SCD 1799-A.

25.5.2 Mileage

A CWES participant is paid mileage between home, approved activity, and/or child care provider and the child’s school if ALL of the following conditions are met:

- Drive a vehicle that does not have to be registered in his/her own name, AND
- The client presents a valid driver’s license, AND

- The client presents proof of current auto insurance. (Insurance is not required to be in the client's name.) AND
- If public transportation from home to the approved activity is not available or public transportation takes more than two (2) hours round trip. The two-hour round trip travel time includes the time it takes a client to walk from home to public transit and from public transit to his or her activity/employment. Time to and from the child's school or child care does not count.

A client will not be paid mileage for travel required on the job.

Prior to authorizing a mileage reimbursement, a copy of the client's valid driver's license and proof of auto insurance coverage for the vehicle the client uses must be on file in the client's CWES file.

Generally, auto insurance policies follow the vehicle. If the vehicle is insured, anyone with a driver's license driving the vehicle with the owner's permission is considered insured. The policy would be in effect in these circumstances. However, due to a negative driving record, the insurance agency may determine a certain person is excluded from the insurance policy, or the owner may sign a statement excluding a person from coverage.

If the CWES client is not a named insured person on the "Proof of Insurance" they MUST be asked if they are "EXCLUDED" from the policy. Some examples of questions to ask the client could be:

- "Since your name does not appear on this 'Proof of Insurance,' are you excluded from this policy?"
- "Did anyone sign anything for the insurance company stating that you would not be driving this vehicle?"

If the client answers "YES" to one of these questions, or a similar one, indicating he/she is "EXCLUDED" from the policy, mileage reimbursement cannot be authorized when the client is using this vehicle because there is NO auto insurance coverage.



Note:

Post Aid clients are eligible for mileage.

25.5.3 Mileage Verification

Mileage claimed is verified by any of the following methods:

- Street Map
- "General Affidavit" (SCD 101) signed by the client
- Information Mapping via on-line (examples: "Yahoo" or "MapQuest")
<http://www.mapquest.com>
- Valley Transportation Authority (VTA) Home Page
<http://www.vta.org/schedules/>

25.5.4 Mileage Payment Rate

Mileage reimbursement payments are paid to CWES clients who choose to drive their own vehicle. The rate paid is the same rate used to reimburse County employees. The current rate is \$0.585 per mile.

25.5.5 Reimbursement of Car Pool Fees

If a client is in a car pool and pays the driver, reimburse the client at the cost of the actual amount paid to the driver or the mileage payment rate, whichever is less. The client must provide a written statement of the fee paid to the driver. The driver must sign and date the statement and list the period included in the cost(s). The amount reimbursed to the client cannot be more than the mileage payment rate.

25.5.6 Reimbursement of Parking Fees

Parking costs for clients approved for mileage payments are paid at the actual cost to the client [Refer to "Mileage," page 25-5]. clients must submit receipts for parking, except where parking meters are used. When a client requests reimbursement of a parking meter fee, the client must sign a "General Affidavit"

(SCD 101). Parking meter fees can not be paid if a parking permit was paid for the same location.

25.5.7 Bus Pass/Fare Rates

Use the following chart to determine the appropriate bus pass rate:

TYPE OF PASS	Rate Through December 31, 2018	Rate Beginning January 1, 2019
ADULT MONTHLY	\$80.00	\$90.00
YOUTH MONTHLY	\$30.00	\$35.00
ADULT DAY	\$7.00	\$7.50
YOUTH DAY	\$3.00	\$3.75
SUMMER YOUTH	\$60.00	\$70.00



Note:

A flash pass can be used on VTA buses and Light Rail.

**Note:**

Summer Youth passes go on sale in May. [Refer to Chapter 25, Section 25.5.9 "Discounted Youth Pass," page-8] for additional information.

If a client's mode of transportation is by bus or light rail, the VTA fare is not pro-rated. All clients approved for, bus/light rail, transportation-related expenses receive the full amount for the month.

**Note:**

In CalWIN select, "Bus Pass" from Transportation drop-down value

There are instances, due to time constraints, when CWES Workers must issue bus passes to the client and/or youth in order for the individual to participate in a welfare-to-work activity. A supply of adult and youth bus passes is kept in each district office. CWES staff processes bus pass requests according to district office procedures.

25.5.8 Youth Pass

Children ages 5-17 may receive the equivalent of a youth pass for transportation between home, school and/or day care provider, and to other extracurricular activities if the child's transportation is necessary in order for the parent to participate in a welfare-to-work activity. Children under age five are not charged for the use of public transportation.

**Note:**

Child care providers who charge for transporting a child between school and the provider, must be paid as long as the cost of child care, including transportation, is at or below the Regional Market Rate (RMR).

25.5.9 Discounted Youth Pass

VTA offers a type of special bus pass to youths 18 years of age or younger at a significant cost savings off the regular price of three monthly passes:

- Summer Youth Pass (covers June through August).

Youths may receive an advance payment in May for the purchase of the Summer Youth Pass that goes on sale mid May. A participant who receives this public transportation advance must not be issued any other public transportation related expense (TRE) payment for the remainder of the corresponding three-month period.

Refer to the [VTA website](#) for additional information.

To qualify for the special bus pass advance, the individual must be age 18 or younger, and meet the following guidelines:

- Teen-Parent Welfare to Work (TPWTW) participants must be scheduled to participate in an approved activity for at least two of the three months covered in their pass.
- WTW teen participants (truant teens) must be scheduled to participate in an approved activity for at least two of the three months covered in their pass.
- For children of registered WTW participants, the participant must be scheduled to participate in an approved activity that includes at least two of the three months covered in their pass.

**Reminder:**

A “Notice of Action (NOA) must be issued to the individual that references the three-month period.

25.5.10 Caltrain

The Caltrain serves the Peninsula Corridor from San Francisco to Gilroy and cities in between. Train fare is based on commuting zones. Use the Caltrain Timetable and Information Guide to determine train fare. The Caltrain Timetable and Information Guide is available on the internet [www.caltrain.com], in Take One boxes on the train or at staffed stations, and can be requested by mail by calling 1-800-660-4287.

**Note:**

In CalWIN select, “Public Transportation” from the Transportation drop-down value.

25.6 Processing the Reimbursement Request

When processing the SCD 1799-A the CWES Worker must:

- Verify that required documentation is in IDM or attached to SCD 1799-A.
- Calculate reimbursement for mileage, parking fees or car pool fees.

25.6.1 Mileage Calculation

Calculate the number of miles to be reimbursed by taking the total miles the client traveled during the month and MULTIPLYING by the mileage payment rate, and DEDUCT any advancements.

25.6.2 Parking Fees Calculation:

Review and add all receipts submitted with the SCD 1799-A. Determine if monthly parking fees, including monthly parking permits, were incurred during the time frames approved.

An SCD 1799-A is not used when a client requests reimbursement for a parking permit obtained from a college, university, or educational provider because the fee is not a monthly recurring fee. The liaisons, representative, or designated staff provide verifications to the client for reimbursement or advancement of fees at the beginning of each school term.

25.6.3 Car Pool Fees Calculation:

Review receipt/statement signed by the driver and pay client the actual amount paid to the driver, subtract any advancements.



Example:

Statement from the driver states the client paid \$100 for the month of July. On June 23, the CWES Worker issued an INITIAL advancement of \$70.00 for the month of July.

Total Car Pool Fees for July	\$100.00
MINUS - Advancement	-\$70.00
TOTAL REIMBURSEMENT	\$30.00

25.6.4 Advance Payments

Advance payments for transportation-related expenses must be issued to the client when necessary and desired by the client so that the client need not use personal funds to pay for this expense.

An INITIAL payment equal to the monthly bus fare is advanced to clients who choose to drive their own vehicle or car pool, and are otherwise eligible.

TRE payment to cover public transportation such as, adult and youth bus fare, train fare, adult and youth bus passes is advanced to the client.

If a client needs a mileage, car pool or parking fees advancement greater than the INITIAL advancement the CWES Worker must:

- Project necessary TRE based on estimated mileage, car pool or parking fees.
- Request that the client sign an SCD 101 estimating TRE cost.

**Reminder:**

When processing the SCD 1799-A DEDUCT the adult's advancements payment from the mileage reimbursement payment.

25.6.5 TRE Receipts

Clients are required to submit ORIGINAL receipts for any advanced TRE payments, except for bus flash passes, within 10 calendar days from the date of the check. If information is not received by the due date the CWES Worker must declare an over-payment.

25.7 Over-payments

The client must pay back any transportation payments that he or she was not entitled to receive. CWES Workers must follow current over-payment procedures.

25.8 Notice Requirements

Notices of Action (NOAs) are system generated in CalWIN and issued to clients for the following types of actions and changes in transportation-related expenses:

- "Transportation Approval" (NA 820)
- "Transportation Denial/Discontinuance" (NA 821)
- "Transportation Change" (NA 822)
- "Transportation Extension (NA 824)

25.8.1 Approval Notice of Action

A completed "Transportation Approval" (NA 820) must be issued to the client for transportation-related expenses payment. An approval NOA is not required for TRE for a client to attend Orientation.

When a client and/or that client's child(ren) is eligible for transportation-related expenses, these expenses must be allowed for the maximum length of the activity. This must be clearly stated on the "Transportation Approval" (NA 820).

25.8.2 Denial Notice of Action

Use the "Transportation Denial" (NA 821) to deny/discontinue any request for transportation-related expenses.

25.9 TRE Authorization On-line

25.9.1 Assignment of TRE

To assign (approve) TRE on-line, refer to “**Assign Transportation Services**” OLUM procedure in CalWIN.

25.9.2 Authorization/Issuance of TRE

In CalWIN, a TRE payment is issued when TRE is authorized. To make a TRE payment, refer to “**Authorize Supportive Services Payment**” OLUM procedures in CalWIN.

25.10 Length of Approval

Use the following chart to determine the maximum length of time to approve transportation-related expenses:

Activity	Length of Approval
Orientation	A bus pass may be issued. An approval NOA is not required for transportation-related expenses for a client to attend Orientation.
Employment and on cash aid	Three months. (Note: If the client remains full-time employed at the end of the initial 3 month period, the client is approved for additional transportation-related expense in 3-month increments.)
Education or Vocational Training at a Community Based Organization (CBO)	Length of approved activity
Education or Vocational Training at Adult Education, Community College or private school	Length of quarter/semester
Education or Vocational Training at private school on a modular schedule	Length of program
Job Readiness Services	Length of approved activity
Assessment	Length of full assessment process. (If assessment is estimated to last more than a month, approve transportation-related expense in increments of 1 month.)
Learning Disability Evaluation	Length of session
Post-aid services	12 months after the month of cash aid discontinuance or balance of post aid services

Activity	Length of Approval
Part-time employment with Part-Time Job Search	3 months
Work Experience/Community Service	Length of approved activity
Transitional Subsidized Employment (TSE)	Length of approved activity
Domestic Abuse Services	Length of activity
Concurrent Vocation Training, Education, or Assessment with part-time employment	Length of Vocational Training, Education, or Assessment
Welfare-to-work programs and services, such as family conferences, etc.	Length of program.

25.11 Good Cause

If transportation-related expenses are not available, the client has good cause for not participating. [EAS 42-713.21]

25.12 WTW Sanction Status

Current participants who become WTW sanctioned, or former CalWORKs recipients with a WTW sanction, are not eligible for PAS.

If the individual has sufficient CalWORKs TOA remaining, he/she must lift the sanction and participate in WTW to receive TRE and Ancillary.

Individuals who choose not to lift the sanction should be referred to the A9P designated staff for direct enrollment to Stage II Child Care, as appropriate.

25.13 Curing Sanction

Clients who are in “curing sanction” status are eligible to receive TRE to participate in welfare-to-work activity(ies) when curing a sanction.

25.14 Post-Aid Services

Post-aid transportation-related expenses are available for all eligible post-aid clients. Post-aid services are available for a maximum of 12 months after cash aid is terminated.



Example:

A CalWORKs client is discontinued from cash aid on June 30. The employed client is eligible for post-aid services from July 1 through June 30 of the following year. The “Transportation Approval” (NA 820) may approve transportation-related expenses from July 1 through June 30.



Note:

Clients who are excluded from CalWORKs by law (fleeing felons) are not eligible for post-aid services.

Effective April 1, 2015, convicted drug felons are no longer excluded by law as long as they do not violate the conditions of their probation or parole.

25.14.1 Telephone Requests

Eligible post-aid clients who do not have an assigned CWES worker, may call (408) 758-3777 to request transportation-related expenses. On a daily basis, support staff will retrieve and respond to messages left at this telephone number.