Back to Basics
Agenda

• Welcome and Introduction
• Management Evaluation Guide
• Management Evaluation Scorecard
• Payment Accuracy
• Management Evaluation Proven Practices
• Reference
Los Angeles Office

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Team Member Since: 2017

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Team Member Since: 2017

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Team Member Since: 2015

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Team Member Since: 2009

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Team Member Since: 2015
Program Access Components

- Lobby Observation
- Reception Staff
- Screening
- Intake Interviews
- Recertification Process
- Call Center
- Website Review
- ME Follow Up
LOBBY OBSERVATION
Program Access
LOBBY OBSERVATION
LOBBY OBSERVATION
Your documents will be date stamped with today's date. The documents will be ready to view in 24 hours.

Sus documentos se marcarán con la fecha de hoy. Los documentos estarán disponibles para revisar en 24 horas.
CDSS will observe the lobby for applications that are available to the public, without the public having to ask for one. The HH should be free to access an application without interacting with a CWD employee.

**Regulation:** MPP 63-300.34

- Application shall be readily accessible and provided to anyone who requests the form.
ES Verbal Informing

CDSS will observe the CWD front end application process to ensure that HHs are informed about expedited service when they inquire about CalFresh.

Regulation: MPP 63-301.521

- A CWD employee or volunteer shall inform potential applicants orally of the right to expedited service and how to initiate the process.
- The CWD shall advise HHs who inquire about the CalFresh program by telephone of expedited service.

Note: The CWD shall assist an applicant, upon request, in filling out forms and completing the application process.
LOBBY OBSERVATION

Expedited Services (CF ES) Greeter's Script

"Did you know that the County of Santa Clara has Expedited Services (ES) available for CalFresh applications?"

✓ "All applications will be screened to determine if you are eligible for CalFresh ES benefits."

✓ "Your Eligibility Worker (EW) will provide further details to you."

✓ "If you need assistance in filling out forms and completing the application process, please let us know right away."

Note: The County of Santa Clara will also advise individuals who inquire about the CalFresh program by telephone of the ES processing standards for eligible households.
ES Verbal Informing

Federal Fiscal Year 2018

- 48% of counties are verbally informing applicants about ES
- 52% of counties are not verbally informing applicants of ES

**Note:** Ranked as number 5, from Top 7 ME Findings.
LOBBY OBSERVATION

Methods to Apply

CDSS will observe the CWD to ensure that HHs are being advised of the methods to apply. This can be completed by posting the Methods to Apply poster that CDSS has shared with counties.

Regulation: MPP 63-300.3

- Each HH shall be advised of their right to file an application, either paper or electronic, on the same day they contact the CWD office.

- HHs must file an application either in person, by mail, fax, through an electronic transmission, or through an online electronic application.
LOBBY OBSERVATION
Ways to Apply for CalFresh

- **Online**
- **In Person**
- **Phone**
- **Mail/Fax**
Minimum Information to Accept an Application

CDSS will observe what method the CWDs utilizes to advise HHs of the minimum information needed to submit a CalFresh application. Particularly, HHs that enter the CWD office but can’t stay to complete the process. This information is included in the Methods to Apply poster shared by the CDSS.

**Regulation:** MPP 63-300.32

- The HH shall be advised that it may file an incomplete application form as long as the form contains the applicant’s name, address and is signature.

- The application may be signed by the Responsible HH member or the Authorized Representative.
Minimum Requirements to Submit an Application:

- **Name**
- **Address**
- **Signature**
CONFIDENTIALITY MAINTAINED

CDSS will listen during any applicant and CWD contact to ensure the applicants confidential information is adequately safeguarded. At times, CDSS will sit in the public chairs/waiting areas in lobbies to gauge the level of confidentiality.

**Regulation:** MPP 19-002.1

- Names, addresses and all other information concerning the circumstances of any individual for whom or about whom information is obtained is confidential and shall be safeguarded.
- This is true of all information whether written or oral.
CONFIDENCE MAINTAINED

LOBBY OBSERVATION

Confidentiality Maintained
LOBBY OBSERVATION

Confidentiality Maintained

Smart Phone

Whiteboard

Calculator

894713269

211819959
Confidentiality Maintained

Federal Fiscal Year 2018

- 11% of the counties are maintaining confidentiality
- 89% of the other counties are NOT maintaining confidentiality

*Note:* Confidentiality is the number 1 finding for ME reviews FFY 2018.
CDSS will request a list of emergency food providers from lobby greeter, reception, and/or window personnel.  

**Regulation:** MPP 63-201.42  
- CWDs shall make available, upon request, a list of emergency food providers in the area served by each local office.

**Note:** Counties that are contracted with 211, meet this criteria.
CDSS will request a list of legal services from lobby greeter, reception, and/or window personnel.

**Regulation:** MPP 63-201.43

- CWDs shall make available, upon request, non-promotional information containing the addresses and phone numbers of local legal services.
CDSS will ensure counties utilize interpreters or the language line when the situation arises.

**Regulation:** MPP 63-202.21

- Bilingual staffing, certification, and program informational material shall be provided.
Hello, my name is ____________.
I speak limited English. I need competent language assistance in Spanish to have full and effective access to your programs.

Under Title VI of the 1964 Civil Rights Act, public agencies are obligated to provide competent language assistance to limited-English-proficient individuals. Social and health service agencies may call HHS Office for Civil Rights at 1-800-368-1019 for more information. Food Stamp and WIC agencies may call USDA Office of Civil Rights at 1-888-271-5983. All other agencies may call U.S. Department of Justice, Civil Rights Division, at 1-888-848-5306.

Spanish

Hello, my name is ____________.
I speak limited English. I need competent language assistance in Spanish to have full and effective access to your programs.

Bajo el Título VI del Decreto de Derechos Civiles de 1964, las oficinas públicas están obligadas a proporcionar ayuda competente, en su propio idioma, a las personas con limitaciones en el inglés. Para más información, las oficinas de servicios sociales y de salud pueden llamar a la Oficina de Derechos Civiles del Departamento de Salud y Servicios Humanos (HHS) al 1-800-368-1019. Las oficinas de estampillas para comida y del Programa de Nutrición Suplemental Especial para Mujeres, Bebés y Niños (WIC) pueden llamar a la Oficina de Derechos Civiles del Departamento de Agricultura de los Estados Unidos (USDA) al 1-888-271-5983. Todas las otras oficinas pueden llamar a la División de Derechos Civiles del Departamento de Justicia de los Estados Unidos al 1-888-848-5306.

Spanish

Hola, mi nombre es ____________.
Hablo muy poco inglés. Necesito ayuda en español para poder tener acceso completo y efectivo a sus programas.

Bajo el Título VI del Decreto de Derechos Civiles de 1964, las oficinas públicas están obligadas a proporcionar ayuda competente, en su propio idioma, a las personas con limitaciones en el inglés. Para más información, las oficinas de servicios sociales y de salud pueden llamar a la Oficina de Derechos Civiles del Departamento de Salud y Servicios Humanos (HHS) al 1-800-368-1019. Las oficinas de estampillas para comida y del Programa de Nutrición Suplemental Especial para Mujeres, Bebés y Niños (WIC) pueden llamar a la Oficina de Derechos Civiles del Departamento de Agricultura de los Estados Unidos (USDA) al 1-888-271-5983. Todas las otras oficinas pueden llamar a la División de Derechos Civiles del Departamento de Justicia de los Estados Unidos al 1-888-848-5306.

Spanish

Здравствуйте, моё имя ____________.
Я плохо говорю по английскому. Для полного и эффективного доступа к вашим программам мне нужна помощь русскогоязычного работника.


Russian

Здравствуйте, моё имя ____________.
Я плохо говорю по английскому. Для полного и эффективного доступа к вашим программам мне нужна помощь русскогоязычного работника.


Russian

Xin chào O’Bà, Anh/Chị, tôi tên là ____________.
Kính năng nói tiếng Anh của tôi có giới hạn. Tôi cần ngữ thông thạo về sinh ngữ giúp tôi bằng tiếng Việt để tôi có thể sử dụng trong văn và hữu hiệu các chức quan của quý vị.

Theo Chương VI của Đạo Luật về Dân Quyền năm 1964, các công sở bất bạo phát cá cừ sẽ giữ đúng thông thạo về ngôn ngữ cho những cá nhân kém thành thạo về Anh ngữ. Các cơ quan xét xử và y tế có thể giữ người cho Bộ Y Tế và Quản Sự Y (HHS) phòng Dân Quyền ở số 1-800-368-1019 để biết thêm tin tức. Các cơ quan về Trò Cập Phục Thủ Pháp và Chúc Mộc thấm phán và diễu đồng bố xung bị đất chung cho phụ nữ, trẻ sơ sinh và trẻ em (WIC) có thể gọi cho Bộ Nông Nhiệt Hoa Kỳ (USDA), phòng Đán Quyền ở số 1-888-271-5983. Tất cả các cơ quan có thể gọi cho Bộ Tư Pháp Hóa Kỳ, phòng Đán Quyền, ở số 1-888-848-5306.

Vietnamese

Xin chào O’Bà, Anh/Chị, tôi tên là ____________.
Kính năng nói tiếng Anh của tôi có giới hạn. Tôi cần ngữ thông thạo về sinh ngữ giúp tôi bằng tiếng Việt để tôi có thể sử dụng trong văn và hữu hiệu các chức quan của quý vị.

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Vietnamese

مرحبا ، اسمي ____________.
إن معرفتي باللغة الإنجليزية محدودة. وزيادة سعة من شخص كوكب في اللغة العربية التي تتوفر لي استخدام كامل وفعال للיצור.

وجه عنوان رقم 2.20 فئة حقوق الإنسان المدنية عام 1964 فإن الهيئة الحكومية مكرسة وتوفر معرفة في اللغة من شخص كوكب الذين يعردهم حقوق الإنسان الدولية. لغزد من المعرفة يمكن للهيئة العامة للتنمية الاجتماعية والمجلس الإداري للتنمية بخصوص حقوق الإنسان في عمان، دار الأعداء بالهند (العربية ونبيلة)، ويسريت عنوان رقم 1019 - 386 - 800 - 1. وتمتلك الهيئة العامة للتنمية (WIC) المنتديات والتعليم والتدريب (UNDA) على رقم 1848 - 848 - 5306.

Arabic
# LOBBY OBSERVATION

Public/HH/Customer Feedback

<table>
<thead>
<tr>
<th>Public/Household/Customer Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why did you come into the office today?</td>
</tr>
<tr>
<td>Were you provided/informed of all Methods to Apply?</td>
</tr>
<tr>
<td>Were you informed of Expedited Services?</td>
</tr>
<tr>
<td>Were you provided with the option of a Telephone Interview?</td>
</tr>
<tr>
<td>How long was your wait time?</td>
</tr>
</tbody>
</table>
LOBBY OBSERVATION

Public/HH/Customer Feedback

Dear Customer,

The County of San Diego is committed to providing every one of our customers with a positive experience and we would like to hear your thoughts. Your input will help us provide exceptional service and your responses will be kept strictly confidential, if requested. Thank you for your participation.

Please fold and seal the survey at the perforated line, and place in a drop box at a Family Resource Center or a US mailbox.

Thank you.

Did you know?
You can do these things without coming into a Family Resource Center:
- Apply for Benefits
- Check on your Benefit Account
- Report Changes
- Submit Certifications and Reports
- Diner at California Easiness (meal plan)
- Submit Renewal Documents

Please use the resources below to access our services:
- My Benefits Portal: MyBenefits.LHSA.SanDiegoCounty.Gov
- Approval Call Center: 1-800-901-5093
- CalWORKs Service App: CalWORKs Service App
- CalWORKs Service Web: MyBenefits.LHSA.SanDiegoCounty.Gov

To help us serve you better,
Please complete the Customer Satisfaction Survey below

1. Purpose of your visit/contact:
   - Application
   - Renewal
   - Provide Documents
   - Information
   - Appeals
   - Other:

2. Date of Visit:
   - Location:

3. Which of the following best describes you?
   - Recent Applicant
   - Family Member or Authorized Representative
   - Current Customer/Recipient
   - Provider/Advocate

4. Did you receive courteous service?  Yes  No

5. Were you satisfied with the information you received?  Yes  No

6. Who was the staff person who served you?

7. What did we do well?

8. What could we have done better?

9. Overall are you satisfied with the service you received?
- Strongly disagree
- Disagree
- Agree
- Strongly Agree

10. If you would like a response to any of your comments, please print your full name, address and phone number below (optional):

   First Name
   Last Name
   Address
   City
   State
   Zip Code
   Telephone Number
   Email Address:

POSITIVE APPROACH = POSITIVE OUTCOMES
APPLICATION PROCESSING

Program Access
County Prescreening Form

CDSS will observe whether counties are prescreening applicants before completing an application for benefits.

*Regulation:* MPP 63-300.21

- Applicants shall **not** be required to complete any CWD developed prescreening form.
Offering Telephone Interviews

CDSS will observe if all applicants are offered a telephone interview appointment.

**Regulation:** ACL 12-26

- CWDs will routinely conduct telephone interviews in lieu of face-to-face interviews at application and recertification for all CalFresh HHs.
CDSS will observe whether counties are accepting incomplete applications. An applicant’s name, address, and signature is the minimum information needed to submit an application for benefits.

**Regulation:** MPP 63-300.32

- The HH shall also be advised that it may file an incomplete application form as long as the form contains the applicant’s name, address and is signed by a responsible member of the HH or an AR.
Duplicative Documents

CDSS will ensure households are not required to provide duplicative information to the CWD.

**Regulation:** 7 CFR 273.2(a)(1)

- The State agency cannot, as a condition of eligibility, impose additional application or application processing requirements.
APPLICATION PROCESSING

All Applications Screened for ES

CDSS will ensure all households applying are screened for ES.

*Regulation:* ACL 12-74

• Effective January 1, 2013, the Welfare and Institutions Code Section 18914 requires the screening of **ALL** CalFresh applications to determine if applicants meet the criteria for ES.

*Note:* ME reviews for 3-days and QC reviews for 7 days.
**Scenario 1 - No Phone Number**

An application was submitted on April 9th, with only name, address, signature. CWD does not have a phone number to contact the HH. However, on the application it was determined that the HH may be ES eligible.

*When should the interview appointment be scheduled?*
**Scenario 1- No Phone Number**

Application date is April 9\textsuperscript{th} (day zero).

CWD will schedule and mail an appointment letter, to the HH for a 3-day appointment.

- Scheduled Interview Date, no later than: 4/12
Scenario 2- Phone Number w/ no answer

An application was submitted on May 15th, with only name, address, signature, and telephone number. On the application it was determined that the HH may be ES eligible CWD was only able to reach the voicemail of the applicant.

*When should the appointment be scheduled? What process should be taken to properly meet ES?*
Scenario 2 - Phone Number w/ no answer

Application date is **May 15th** (day zero).

CWD will schedule an appointment within 3-days, to meet ES timeframe.

- Scheduled Interview Date, no later than: **5/18**

**Note:** At intake an appointment letter is not required, if a voice message is left with a scheduled appointment, date, time, and thorough case narration.

Reference [ACL 16-14](#) for approved voice message scripts.
Acceptable Script when there is no answer

“Hello, my name is Anna Smith. This call is for Pat Jones. I am calling in regards to your recent application submitted on March 24. You have been scheduled for an interview on March 25 at 9:00 am at the following address/location. Please make sure that you bring proof of identity.”

“If you cannot make the scheduled appointment time, please call back at your earliest convenience at (999) 999-9999 to reschedule your interview appointment. Thank you.”
Acceptable Script when someone else answers the phone

“Hello, my name is Anna Smith. This call is for Pat Jones. I am calling in regards to his/her recent application that was submitted on March 24. He/She has been scheduled for an interview on March 25 at 9:00 am at the following address/location. Please make sure he/she brings proof of identity.”

“If he/she cannot make the scheduled appointment time, please have them call back at their earliest convenience at (999) 999-9999 to reschedule their interview appointment. Thank you.”

Note: If CWDs prefer not to use these scripts, CWDs must have their scripts approved by CDSS prior to using them to ensure applicant confidentiality is preserved.
APPLICATION PROCESSING

Application Processing Calculator

[Image of the Application Processing Calculator interface with dates and due dates highlighted]
Household provided the CF 285 (NA)

CDSS will observe to ensure that the CF 285 Application For CalFresh Benefits are readily available in all local offices.

**Regulation:** ACL 15-84

- CWDs are encouraged to use the CF 285 form for all CalFresh only households. CWDs are encouraged to have the CF 285 available in all local offices.

**Note:** The SAWS 1 and SAWS 2 Plus are acceptable.
Household provided the CF 37 (NA) RRR

CDSS will ensure counties are requiring recipients to complete a CF 37 for recertification of benefits.

**Regulation:** ACL 15-84

- CWDs are to use the Recertification for CalFresh Benefits (CF 37) form for recertification of Non-Assistance CalFresh (NACF) households in which no member received a CalWORKs grant.
Date of Application Maintained

CDSS will ensure counties are preserving the date of aid for anyone applying for benefits.

Regulation: MPP 63-300.33

• The CWD shall document the date the application was filed by recording on the application the date it was received by the CWD office.
Single Signature

CDSS will ensure that CalFresh only households are only required to sign one application for benefits.

**Regulation:** ACL 15-84

- CWDs will accept the SAWS1 as a single signature application to begin the application process and set the beginning date of aid at intake.
Appointment Provided

CDSS will ensure that counties are scheduling intake interview appointments timely.

*Regulation:* MPP 63-300.46

- The CWD shall schedule all interviews as promptly as possible to ensure eligible HHs receive an opportunity to participate within 30 days after the application was filed.
Online Application Process

CDSS will assess county websites to ensure the online process promotes program access and enables timely processing of benefits for eligible applications.
### Online Application Website

CDSS will assess the county’s online website portal options.

<table>
<thead>
<tr>
<th>Online Application Website</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online portal options:</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Apply Online</td>
<td></td>
<td></td>
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<tr>
<td>- Submit SAR 7</td>
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<tr>
<td>- Submit Renewal</td>
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<tr>
<td>- Submit Verifications</td>
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</tbody>
</table>
CDSS will ensure the date of aid is preserved and application is processed timely.

<table>
<thead>
<tr>
<th>APPLICATION REGISTRATION CENTRALIZED</th>
<th></th>
<th></th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>If yes, location?</td>
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<tr>
<td>If no, each office has their own application registration unit (What is the process?)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Who is assigned to application registration?

Cut-off time for applications
- Start time
- End time

Checked throughout the day?

Applications date of aid being preserved?

Applications uploaded into the case file?

How are cases assigned to workers?
CDSS will evaluate the county’s business process on how the interview is initiated.

<table>
<thead>
<tr>
<th>ONLINE APPLICATION WEBSITE</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>Comments</th>
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<tr>
<td>Online portal options:</td>
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<td>- Submit Verifications</td>
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<tr>
<th>APPLICATION REGISTRATION CENTRALIZED</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>Comments</th>
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<tbody>
<tr>
<td>If yes, location?</td>
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<tr>
<td>If no, each office registration unit</td>
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</table>

<table>
<thead>
<tr>
<th>INFORMING OF APPOINTMENTS &amp; OPTIONS</th>
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<th>N/A</th>
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<tbody>
<tr>
<td>Phone interview offered?</td>
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<tr>
<td>Same day interview offered?</td>
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<tr>
<td>Process for HH that cannot be reached</td>
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<tr>
<td>Call attempts, how many?</td>
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<tr>
<td>Leave a message with appointment date/time?</td>
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<td></td>
</tr>
<tr>
<td>Generate appointment letter?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email client?</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment Scheduled – How many days out?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>How is ES documented in the case?</td>
<td></td>
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</tr>
</tbody>
</table>
INTAKE & RECERTIFICATION INTERVIEWS

Program Access
Confidentiality

CDSS will listen for interview information that can be overheard from other areas near the interview booths. If interviews are being conducted in the same area, counties should maintain low voices.

**Regulation:** MPP 63-300.4

- The interview is an official and confidential discussion of HHs circumstances with the applicant. Facilities shall be adequate to preserve the privacy and confidentiality of the interview.

**Reminder:** Confidentiality is the number 1 finding for ME reviews FFY 2018.
INTAKE & RECERTIFICATION INTERVIEWS

Confidentiality

Lock your computer before you walk away!

[Image of a keyboard with the Windows logo and the keys 'L' highlighted]
HH is informed of their Rights & Responsibilities

CDSS will listen to interviews to ensure households are informed of their Rights and Responsibilities.

**Regulation:** MPP 63-300.4

- HHs shall be advised of their rights and responsibilities during the interview.
What are the SAR 7 components that are required to be covered during the intake/recertification interview?
HH is informed of their SAR 7 Responsibilities

CDSS will observe for:

1. SAR 7 Verbal Explanation
2. Written Explanation
3. Sample/Copy of SAR 7
4. A telephone number to call for assistance is provided to the HH.

Regulation:

- MPP 63-300.411- Verbal explanation of reporting
- MPP 63-300.411- Written explanation of reporting
- MPP 63-300.412- A copy of the SAR 7 report and explanation of how the report shall be completed and submitted
- MPP 63-300.414- A telephone number (toll-free or a number where collect calls will be accepted from HHs) which the HH may call to ask questions or to obtain help in completing the monthly report
Voter Preference and Registration

CDSS will ensure all households are informed about their opportunity to register to vote.

**Regulation:** ACIN I-04-13

- Under federal law, CWDs must provide the following services to applicants and continuing clients at initial application, renewal or recertification, and change of address.

*Note:* Voter Registration is ranked number 3 of the Top 7 ME case review findings.
Voter Preference and Registration

CDSS will observe to see if the **Voter Preference Form** was provided.

**Regulation:** ACIN I-04-13

- The National Voter Registration Act (NVRA) states all applicants and continuing HHs must be given a Voter Preference Form, regardless of whether they indicate they want to register or not, at the time of application for services, renewal or recertifications, and when the CWD is notified of a HHs change of address.

**Note:** CWDs are required to offer/pre-register 16 and 17 years old the voter registration card and preference form. Refer [ACL 18-39](#).
Voter Preference and Registration

CDSS will observe to see if the **Voter Registration Card** was provided.

**Regulation:** ACIN I-04-13

- The National Voter Registration Act (NVRA) states all applicants and continuing HHs must be given a Voter Registration Card (VRC), regardless of whether they indicate they want to register or not, at the time of application for services, renewal or recertifications, and when the CWD is notified of a HHs change of address.
Voter Preference and Registration

CDSS will review if the county is Retaining the Voter Preference Form.

Regulation: ACIN I-04-13

- CWDs must retain the completed Voter Preference Forms for two years.
HH made to feel at ease

CDSS will observe the interview to ensure the client was treated with courtesy and respect.

**Regulation:** MPP 63-300.4

- The applicants shall be made to feel at ease during the interview and in all instances the HHs right to privacy shall be respected.
HH may bring anyone to the Interview

CDSS will observe the interview to ensure the client was allowed to bring who he/she chooses to the interview.

**Regulation:** MPP 63-300.4

- The individual interviewed may bring any person he/she chooses to the interview.
Interview conducted in HH’s primary language

CDSS will observe if an interview is conducted in the household’s primary language of choice. If a bilingual worker is not available, CDSS will review other options.

**Regulation:** MPP 21-115.15

- County welfare departments shall ensure that effective bilingual/interpretive services are provided to serve the needs of the non-English speaking population and individuals with disabilities. The provision of bilingual/interpretive services shall be prompt without undue delays.

- When the percentage of non-English cases in a program and/or location is less than five percent, the agency shall ensure that effective bilingual services are provided.

**Note:** This requirement may be met through utilization of paid interpreters, qualified bilingual employees, qualified employees of other agencies, community resources, or the use of language line.
ES Properly Processed

CDSS will observe if all applications are screened for ES eligibility at the time a household applies for benefits.

**Regulation:** MPP 63-301.52

- The CWDs application procedures shall be designed to identify HHs eligible for ES at the time the HH files an application.
Benefits issued in 3-days (ES)

CDSS will observe whether ES is available within three days for eligible households.

**Regulation:** MPP 63-301.531

- For HHs entitled to ES at initial application, the CWD shall make the authorization available to the recipient no later than the third calendar day following the date the application was filed.
POP QUIZ!!!

A CF Application is filed today, HH appears to be ES eligible. 
*When should the appointment be scheduled?*
Case file Contains Narration for ES

CDSS will observe whether cases contain documentation of the ES determination.

*Regulation:* ACIN I-14-11

- The case file must contain documentation to support entitlement or non-entitlement for ES.
INTAKE & RECERTIFICATION INTERVIEWS

Case file Contains Sufficient Narration and or Documentation

CDSS will observe whether cases are sufficiently documented after an interview.

Regulation: MPP 63-300.5(j)

- Case files must be documented to support eligibility, ineligibility, and benefit level determinations. Documentation shall be in sufficient detail to permit a reviewer to determine the reasonableness and accuracy of the determination.
INTAKE & RECERTIFICATION INTERVIEWS

CW 2200 Requesting Verification

CDSS will observe whether a CW 2200 Request for Verification was properly completed and given to the household within 10 days.

**Regulation:** ACL 14-26

- To ensure that the request for information is both consistent and adequate in all counties, the CW 2200 has been revised and released as a required form.

*Note:* Please ensure due dates land on a working business day. Refer MPP 63-102 (c)(9) and ACIN I-58-08.
### CW 2200 Requesting Verification

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Item #</th>
<th>Item</th>
<th>Person</th>
<th>Program</th>
<th>Check (✓) the box that applies to you</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/23/18</td>
<td></td>
<td>Driver License</td>
<td>Patrick Schumacher</td>
<td></td>
<td>CW</td>
</tr>
<tr>
<td>6/23/18</td>
<td></td>
<td>Chase bank statement for account ending in 5832</td>
<td>Patrick Schumacher</td>
<td></td>
<td>CF</td>
</tr>
</tbody>
</table>

We need proof from you to see if you can get (or keep getting) cash aid or other benefits. We have listed the information we need below. We will not deny or end your benefits as long as you try to get the proof and tell us if you are having problems.

**June 2018 Calendar:**

<table>
<thead>
<tr>
<th>Su</th>
<th>Mo</th>
<th>Tu</th>
<th>We</th>
<th>Th</th>
<th>Fr</th>
<th>Sa</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
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<td>9</td>
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<td></td>
<td>30</td>
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</tr>
</tbody>
</table>
Notice of Missed Interview (NOMI)

CDSS will observe whether a NOMI is properly provided to a household after missing their interview.

**Regulation:**

- MPP 63-300.46- If a HH misses its scheduled interview, the CWD shall send the HH a Notice of Missed Interview (NOMI).

- MPP 63-300.46- The CWD shall reschedule if the HH requests another interview within 30 days when the initial application was filed.

- MPP 63-201(r)(3)- Compliance with "Recipient Due Dates" means items shall be received by close of business on the date specified unless that date falls on a weekend or holiday, in which case the due date is by close of business on the next normal working day.

**Notes:** Incorrect Notice of Missed Interview is ranked number 2 of the Top 7 ME case review findings.
INTAKE & RECERTIFICATION INTERVIEWS

Notice of Missed Interview (NOMI)

You were scheduled for an interview on 3/7/2018, but you did not keep this appointment. If you still want CalFresh benefits, please contact your worker to schedule another interview.

You must complete your interview with us by 3/31/2018.

You must be interviewed in order for us to determine your eligibility for CalFresh benefits. If you have any questions or want more information, please contact your worker.
Timely and Proper NOA

CDSS will observe whether a Notice of Action is properly given to households after an action is taken.

**Regulation:**

- MPP 63-504.2- All notices of action shall contain the information necessary to be considered adequate
- MPP 63-504.213- A notice of action shall be considered timely if there are at least 10 days from the date the notice is mailed until the effective date of the change
- MPP 63-504.266- Exemptions to NOA (Deceased, Out of County, Postponed Verifications)
Application Processed Timely

CDSS will observe whether applications are approved/denied timely.

**Regulation:** MPP 63-504.6

- The CWD shall complete the application process and approve or deny a timely application for recertification prior to the end of the HHs current certification period
Benefits issued after 15\textsuperscript{th}

CDSS will observe whether benefits issued after the 15\textsuperscript{th}, were prorated for the application month and full benefits were issued for the following month.

\textbf{Regulation:} ACL 08-39

- HHs which apply for benefits after the 15\textsuperscript{th} of the month and have been determined eligible to receive benefits for the initial month and the subsequent month but have had their verification postponed shall receive both allotments at the same time.
Benefits issued in 30-days (Regular)

CDSS will observe whether benefits were issued within 30-days.

**Regulation:** MPP 63-301.1

- The CWD shall provide eligible HHs that complete the initial application process an opportunity to participate as soon as possible, but not later than 30 calendar days following the date the application was filed.
MYSTERY CALLS

Program Access
Mystery Calls

CDSS conducts anonymous calls to counties service/call center to evaluate the assistance and information provided during an initial contact.
Mystery Calls

COUNTY MYSTERY TELEPHONE CALLS

District Office: ________________________________

Address: ________________________________

Phone Number: ________________________________

Date: ________________________________

Time: Start: _______________ End: _______________

Reviewer: ________________________________

Average wait time: ________________________________

Language: ________________________________

Worker’s Name (optional): ________________________________
Mystery Calls

1. I need some help. I would like to get CalFresh benefits. What do I need to do? Do I have to come into the office to apply?

2. What time can I come in today to apply and where do I go to apply?

3. What do I need to bring with me?

4. How long will I be at the office to apply?
5. How long does it take to get CalFresh benefits? (If the person says it will take longer than 3 days to get CalFresh, ask if you can get them sooner than that. If the person presses your personal circumstances, state that, “I don’t have any income and only have about $50 in the bank.”)

6. If I can’t get to the office, can I call again and ask to get an application by mail?

7. Could I fax the application back? What is your fax number?

Additional observations from call:
Mail CF Application

CDSS will inquire whether a CF application can be mailed.

*Regulation:* MPP 63-300.34

- If a HH contacting the CalFresh office by telephone does not wish to come to the office to file the application that same day and instead prefers receiving an application through the mail, an application form shall be mailed to the HH on the same day the telephone request is received.
Verbally Informed of ES

CDSS will ensure households are verbally informed about ES.

**Regulation:** MPP 63-301.521

- The CWD also shall advise individuals who inquire about the CalFresh Program by telephone of the ES processing standards for eligible HHs.
Methods to Apply

CDSS will inquire about the different methods to apply.

*Regulation:* MPP 63-300.3

- Each HH shall be advised of their right to file an application, either paper or electronic, on the same day they contact the CWD office.

- HHs must file an application either in person, by mail, fax, through an electronic transmission, or through an on-line electronic application.
Minimum information to file an application

CDSS will inquire about the minimum requirements to file an application.

- Name, Address, Signature

**Regulation:** MPP 63-300.32

- The HH shall be advised that it may file an incomplete application form as long as the form contains the applicant’s name, address and signature.

- The applicant may be signed by the Responsible HH member or the Authorized Representative.
OFFICE CLOSURE PROCEDURES

Program Access
OFFICE CLOSURE PROCEDURES

Hours Posted

CDSS will ensure that correct office hours and days of operation are posted on the outside of the CWD offices.

*Regulation:* ACL 04-55

Post notices in prominent locations within the CWDs offices and in public areas, including the doors immediately outside the CWDs offices which inform the public about the working days, or the regular eight hours of a working day. Also:

- when the offices will be closed
- the procedures to obtain and file applications
- the procedures for applying for and receiving ES
MPP 11-601.3 established the following requirements when county welfare offices are closed during the regular eight hours of a working day.

**Applications and Drop Box**

CDSS will ensure applicants and participants are able to leave applications and documents if an office is closed during normal business hours.

*Regulation:* ACL 04-55

- Provide individuals the opportunity to file an application for CalFresh within the time frames prescribed by federal and state law by making applications readily available and providing a drop-box, mail slot, or other reasonable means for filing applications.
# OFFICE CLOSURE PROCEDURES

<table>
<thead>
<tr>
<th>DROP-BOX MAIL</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>Comments/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who picks up?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who Scans?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pick-up times</td>
<td></td>
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<tr>
<td>Last pick-up</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Date-stamped correctly</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date stamp only first page</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date stamp all Individual Documents</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Who Images?</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Who Index, validates, review for QA?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Documents stored/How long before shredding</td>
<td></td>
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</tr>
</tbody>
</table>
OFFICE CLOSURE PROCEDURES

COUNTY OF SAN BERNARDINO
NON-CASH DROP BOX
PICK-UP TIMES
8:30 AM
11:00 AM
1:00 PM
4:30 PM

DROP BOX
Documents received before 5:00PM will be stamped with today’s date

BUZÓN
Documentos recibidos antes de las 5:00PM serán sellados con la fecha de hoy
# OFFICE CLOSURE PROCEDURES

<table>
<thead>
<tr>
<th>CENTRALIZED IMAGING UNIT</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>Comments/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yes - Location</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>No - Each office has their own imaging unit</strong></td>
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</tr>
<tr>
<td>Reception does up-front scanning</td>
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<td></td>
</tr>
<tr>
<td>• Date stamp</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>• Case comment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Receipts provided to client</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scanning Kiosks for documents</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Yes - who pulls/scanned documents to the case file? How often?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name of system used to electronically store documents</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Who index, validates, review for QA?</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Documents stored for how long before shred?</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
MANAGEMENT EVALUATION SCORECARD
Management Evaluation Top 7 Findings FFY 2018

1. Confidentiality
2. SAR 7 (Phone#) Not Provided
3. Voter Registration
4. Appointment Scheduled outside of ES Timeframe
5. ES (Verbal) Informing
6. SAR 7 (Sample) Not Provided
7. SAR 7 (Verbal) Informing
Management Evaluation Case Review
Top 7 Findings FFY 2018

1. Incorrect NOMI
2. Incorrect NOA
3. No ES Screened
4. Single Signature
5. Incorrect use of CW 2200
6. Insufficient Case Narrative
7. No NOA Sent

Management Evaluation Top 7 Case Errors FFY 2018

<table>
<thead>
<tr>
<th>Type of Errors</th>
<th># of Errors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorrect NOMI</td>
<td>34</td>
</tr>
<tr>
<td>Incorrect NOA</td>
<td>26</td>
</tr>
<tr>
<td>No ES Screened</td>
<td>23</td>
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<tr>
<td>Single Signature</td>
<td>20</td>
</tr>
<tr>
<td>Incorrect Use of CW2200</td>
<td>17</td>
</tr>
<tr>
<td>Insufficient Case Narrative</td>
<td>17</td>
</tr>
<tr>
<td>No NOA Sent</td>
<td>13</td>
</tr>
</tbody>
</table>

Total Case Reviews

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewed ME Cases</td>
<td>575</td>
</tr>
<tr>
<td>ME Case Error</td>
<td>205</td>
</tr>
<tr>
<td>ME Case Error Rate</td>
<td>36%</td>
</tr>
</tbody>
</table>

FFY 2018 ME Top 7 Case Errors

Type of Errors

- Incorrect NOMI: 34
- Incorrect NOA: 26
- No ES Screened: 23
- Single Signature: 20
- Incorrect Use of CW2200: 17
- Insufficient Case Narrative: 17
- No NOA Sent: 13
PAYMENT ACCURACY
Case Reviews

Case reviews are conducted to identify trends and potential problem areas based on the case findings.

Case reviews are randomly selected by the list provided from CWD.

The case list consists of 3 type of reviews:

- **Denial Cases**
- **Terminated Cases**
- **Recertification Cases**
Large, Medium, and Small counties are determined by the county caseload size.

The number of cases pulled for ME sampling, are based on the county sizes.

- **Large counties** - 40 cases
- **Medium counties** - 30 cases
- **Small counties** - 15 cases
## PAYMENT ACCURACY

<table>
<thead>
<tr>
<th>Large Counties</th>
<th>Medium Counties</th>
<th>Small Counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Los Angeles</td>
<td>• Merced</td>
<td>• Tehama</td>
</tr>
<tr>
<td>• San Bernardino</td>
<td>• Monterey</td>
<td>• Nevada</td>
</tr>
<tr>
<td>• San Diego</td>
<td>• Solano</td>
<td>• Napa</td>
</tr>
<tr>
<td>• Riverside</td>
<td>• Sonoma</td>
<td>• Siskiyou</td>
</tr>
<tr>
<td>• Orange</td>
<td>• Santa Barbara</td>
<td>• Tuolumne</td>
</tr>
<tr>
<td>• Sacramento</td>
<td>• Imperial</td>
<td>• Calaveras</td>
</tr>
<tr>
<td>• Fresno</td>
<td>• Butte</td>
<td>• Del Norte</td>
</tr>
<tr>
<td>• Kern</td>
<td>• San Mateo</td>
<td>• San Benito</td>
</tr>
<tr>
<td>• Alameda</td>
<td>• Santa Cruz</td>
<td>• Amador</td>
</tr>
<tr>
<td>• Santa Clara</td>
<td>• Shasta</td>
<td>• Lassen</td>
</tr>
<tr>
<td>• Tulare</td>
<td>• Humboldt</td>
<td>• Glenn</td>
</tr>
<tr>
<td>• San Joaquin</td>
<td>• Madera</td>
<td>• Plumas</td>
</tr>
<tr>
<td>• Stanislaus</td>
<td>• Kings</td>
<td>• Mariposa</td>
</tr>
<tr>
<td>• Ventura</td>
<td>• Yolo</td>
<td>• Inyo</td>
</tr>
<tr>
<td>• San Francisco</td>
<td>• San Luis Obispo</td>
<td>• Trinity</td>
</tr>
<tr>
<td>• Contra Costa</td>
<td>• Placer</td>
<td>• Colusa</td>
</tr>
<tr>
<td></td>
<td>• El Dorado</td>
<td>• Modoc</td>
</tr>
<tr>
<td></td>
<td>• Mendocino</td>
<td>• Mono</td>
</tr>
<tr>
<td></td>
<td>• Lake</td>
<td>• Sierra</td>
</tr>
<tr>
<td></td>
<td>• Marin</td>
<td>• Alpine</td>
</tr>
<tr>
<td></td>
<td>• Yuba</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sutter</td>
<td></td>
</tr>
</tbody>
</table>
# PAYMENT ACCURACY

## Denial Case Reviews

### DENIALS

1. Was the denial timely?
   - Application filing date __________
   - Interview Date (within 3 days) __________
   - Date of NOA __________
   - Denied Before/After 30 days __________

2. Was the denial NOA correct?
3. Is there verification? (student status, felony, income, etc.)
4. Was the narration sufficient?*
5. Was the NOMI timely (if applicable)?
6. Was the NOA reason(s) correct?

### EXPEDITED SERVICE

1. Was the HH screened for ES on application?
2. Was there narration for ES?*

---

[Table for PAYMENT ACCURACY criteria with Yes/No/N/A options]

[Diagram of a form with fields for PAYMENT ACCURACY]
## Terminated Case Reviews

### TERMINATIONS

1. Was the termination action correct?
2. Is there documentation (verification) to support the action?
3. Was the narration sufficient?*
4. Was the termination notice sent? Date __________
5. Were benefits issued the following month after the term action?

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
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*Note: Additional verification may be required for narration sufficiency.*
Recertification Case Reviews

1. Last approval NOA (for certification) ______________
2. Timely NEC issued ______________
3. Appointment Letter issued ______________
4. Date of Interview ______________
5. NOMI Issued (if no show on interview)? __________
6. Recert action to approve/deny taken prior to the end of current Cert?  
7. Recert Approval, was HH provided uninterrupted benefits?  
8. Was a timely NOA provided to the HH?  
9. Was case adequately documented and narrated to support action?
MANAGEMENT EVALUATION PROVEN PRACTICES

CALFRESH RESOURCE PAGE
Department Website

CDSS will review CWD websites for:

- **Methods to Apply**
- **Minimum Requirements to File an Application**
- **Days and Hours of Operation**
- **Call Center Info (If applicable)**
How to access the CDSS Management Evaluation CalFresh Resource Center:

**Step 1**

- Enter URL [www.cdss.ca.gov/](http://www.cdss.ca.gov/) in the web address bar
Step 2

- Click on Information & Resources
Step 3

- Click on **CalFresh** listed under Resources A to Z

Or

- Click on **CalFresh** listed under Programs-Cash Aid, Food and Service Programs
Step 4

- Under More Information, click on CalFresh Resource Center
Step 5

- Listed under Quick Links, click on Management Evaluations
Step 6
Listed under Management Evaluation
- ME Schedules
- Management Evaluation Checklist
- Best Practices Guides (Listed by counties)

MANAGEMENT EVALUATION PROVEN PRACTICES

Management Evaluations

Schedules
- Management Evaluation Schedule 2017-2018 Last Updated 2.23.2018
- Management Evaluation Schedule 2016-2017
- Management Evaluation Schedule 2015-2016

Tools
- Management Evaluation Checklist
- Best Practices

Quick Links
- Resource Center Home
- Data Dashboard
- Policy Guidance
- Accuracy, Timeliness & Quality Control
- Management Evaluations
- Participation & Outreach
- Employment & Training
- Nutrition Education
- Disaster CalFresh
- Meetings and Conferences
- Related Publications
REFERENCES

Management Evaluation
Manual Policies and Procedures (MPP)
California Federal Regulations (CFR)
All County Letters (ACL)
All County Information Notices (ACIN)

Note: Click on the references link above, for direct access to the website.