

# SCOPE OF WORK EXPLAINED

# CALFRESH APPLICATIONS SUBMITTED

- *“Submission of CalFresh applications (both paper applications and online applications) by your agency and/or subcontractors on behalf of a client and funded by the CFO plan.” –Exhibit A*

# APPLICATIONS SUBMITTED

- An application submitted refers to the process of your agency or subcontractor submitting an application either online or paper to the County Welfare Department on behalf of the client.
- Agencies are encouraged to submit all applications online.
- An application completed and submitted by a client is **not** considered an application submitted by the agency.
- Applications should be as complete as possible and include all necessary documentation.



# DOCUMENTATION

- Submitted applications must be counted on the CalFresh **SOW Report spreadsheet** provided by your program analyst.
- You may use the CalFresh **Outreach Activity Log** to track submitted applications.
- Please be advised you will need to track **special populations** only for submitted applications.



# SPECIAL POPULATIONS

- Seniors (age 60 and older)
- Working low-income households (a household that has earned income and qualifies for the program)
- Immigrants (eligible non-citizens that have legal status to be in the U.S.)
- Latinos (those who trace their ancestry to Cuba, Mexico, Puerto Rico, or Central and South America)
- Mixed-status households (A mixed-status household is one that contains one or more ineligible non-citizens and one or more eligible non-citizens or citizens.)
- Veterans and military families (military veterans and families of active duty military)



# CALFRESH APPLICATIONS APPROVED

- *“CalFresh applications submitted by your agency and/or subcontractors on behalf of a client and subsequently approved by the County Welfare Department (CWD) for benefits.” – Exhibit A*

## APPLICATIONS APPROVED

- An approved application is an application that was completed by your agency or subcontractor, either online or on paper and submitted to the CWD on behalf of the client, and subsequently approved by the CWD.



# DOCUMENTATION

- Approved applications must be reported on the CalFresh **SOW Report spreadsheet** provided by your program analyst.
- Applications do not have to be tracked on an individual basis.
- Applications should be tracked in aggregate using the Community Based Organization (CBO) portal or by working with the county to determine the process that works best to supply application approval data to your agency.
- Your program analyst will review your **SOW Report** and discuss your progress.



# SUGGESTED STRATEGIES

- All counties utilize one of three Statewide Automated Welfare Systems--SAWS (LEADER, C-IV, and CalWIN) that allow individuals to apply for benefits and manage their case.
- LEADER, C-IV, and CalWIN have CBO Portals that allow CBOs to track, in aggregate, the number of submitted applications, pending applications, approved applications and denied applications.
- Become familiar with the SAWS system(s) that you will access on behalf of your clients.
- Please check that your organization has registered to use the CBO Portal(s) and that you use the appropriate tracking codes for your agency when you submit an application on behalf of your client.



# SEMI-ANNUAL REPORT (SAR 7) FORMS/ CALFRESH RECERTIFICATION APPLICATIONS

- *“SAR 7 forms or CalFresh Recertification Applications submitted by your agency and/or subcontractors on behalf of a client.” – Exhibit A*

# SEMI-ANNUAL REPORT (SAR 7) FORMS / CALFRESH RECERTIFICATION

- A SAR 7 form or CalFresh Recertification Application submitted refers to the process of your agency or subcontractor submitting a SAR 7 form to the County Welfare Department on behalf of the client.
- A client who completes and submits a SAR 7 form or CalFresh Recertification Application on their own is **not** considered submitted by the agency.



# DOCUMENTATION

- SAR 7 forms or CalFresh Recertification Applications must be reported on the CalFresh **SOW Report spreadsheet** provided by your program analyst.
- You may use the CalFresh **Outreach Activity Log** to track submitted SAR 7s and Recertifications.



# PARTNERING AND GENERAL CFO ACTIVITIES

- *“Partnering with counties and CBOs to address barriers to participation and meet the overall goals of the CFO Plan.” – Exhibit A*

# PARTNERING AND GENERAL CFO ACTIVITIES

- Distribution of CFO approved materials (posters, brochures, web sites and direct mail) to inform low-income, potentially eligible households about CalFresh eligibility. No funds from this contract shall be used for public service announcements on radio, television or billboards
- Participating in local collaborative meetings to promote CFO
- Providing training and technical assistance to other agencies serving the targeted populations



# DOCUMENTATION

- These activities need to be described on your semi-annual narrative progress reports.

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QUESTIONS ?

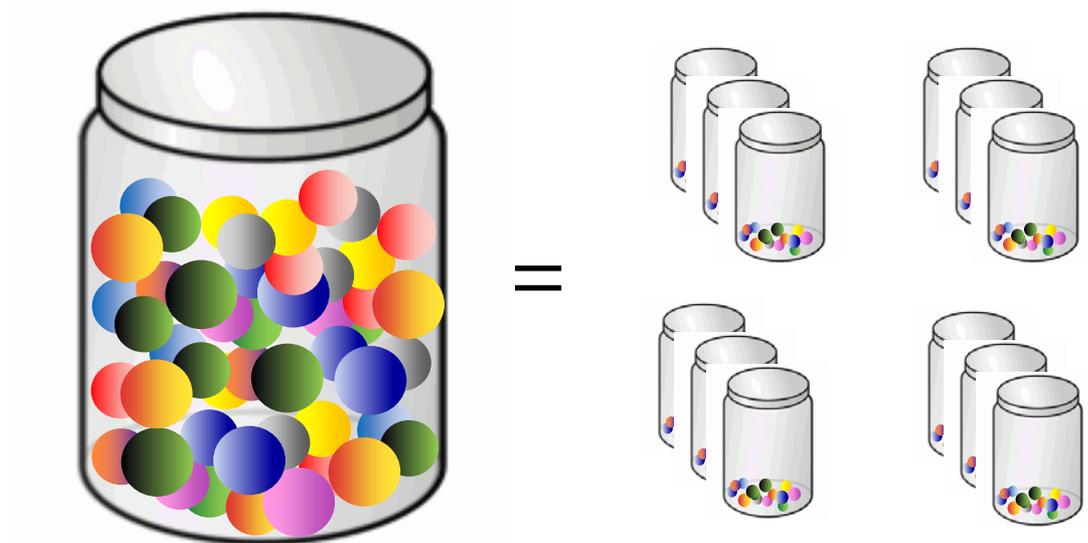


## PARKING LOT:

- Issue: What if a client does not want to answer to the ethnicity question?
- Does the CBO portal allow for unduplicated counts of approved applications?
- When will the new SOW activity sheet be available?

# SCOPE OF WORK: EXAMPLE

- Prime Contractor A has set the annual SOW at 300 approved applications, or an average of 25 approved applications per month.



- The contractual expectation is that you complete at least 75% of the annual SOW for approved applications.



# SCOPE OF WORK AND TRACKING FORM

Contractor Name:		Prime Contractor A		
Organization Names	Applications Submitted	Applications Approved	SAR 7s Submitted	Recertifications Submitted
Subcontractor A	10	0	0	0
Subcontractor B	20	0	0	0
Subcontractor C	20	0	0	0
<b>Total:</b>	<b>50</b>	<b>0</b>	<b>0</b>	<b>0</b>

- In one month, you submit 50 applications



- October, 2014



# SCOPE OF WORK TRACKING FORM

<b>Contractor Name:</b>		Prime Contractor A		
<b>Organization Names</b>	<b>Applications Submitted</b>	<b>Applications Approved</b>	<b>SAR 7s Submitted</b>	<b>Recertifications Submitted</b>
Subcontractor A	10	5	0	0
Subcontractor B	20	5	0	0
Subcontractor C	20	10	0	0
<b>Total:</b>	<b>50</b>	<b>20</b>	<b>0</b>	<b>0</b>

- For that month, a total of 20 applications were approved



- October, 2014
  - Total approved: 20
  - Scope of Work: 25



# SCOPE OF WORK TRACKING FORM

<b>Contractor Name:</b>		Prime Contractor A		
<b>Organization Names</b>	<b>Applications Submitted</b>	<b>Applications Approved</b>	<b>SAR 7s Submitted</b>	<b>Recertifications Submitted</b>
Subcontractor A	0	0	0	0
Subcontractor B	10	0	0	0
Subcontractor C	10	0	0	0
<b>Total:</b>	20	0	0	0

- The following month, you submit 20 applications



○ November, 2014



# SCOPE OF WORK TRACKING FORM

<b>Contractor Name:</b>		Prime Contractor A		
<b>Organization Names</b>	<b>Applications Submitted</b>	<b>Applications Approved</b>	<b>SAR 7s Submitted</b>	<b>Recertifications Submitted</b>
Subcontractor A	0	5	0	0
Subcontractor B	10	15	0	0
Subcontractor C	10	10	0	0
<b>Total:</b>	<b>20</b>	<b>30</b>	<b>0</b>	<b>0</b>

- For that month, a total of 30 applications were approved



- November, 2014
  - Total Applications approved over time: 50
  - Scope of Work: 50



# SCOPE OF WORK TRACKING FORM

- Each month you will submit applications to the county. Not all of the applications you submit in the month will be approved that month. Eventually, the data will show the status of all applications, either approved or denied.

Approved Applications

○ 25



○ 15



○ 45



○ December 2014

○ January 2015

○ February 2015

Approved Applications to SOW monthly goal

○ 75/75

○ 90/100

○ 135/125



# SCOPE OF WORK

- The annual SOW completion rate for Prime Contractor A is set at 300 applications approved



225+ Approved Applications fulfills the contract

- What questions do you have?



## PARKING LOT:

- Issue: What documentation will be required during the tracking?
- If a county is unable to track paper applications, what do we suggest that they do?
- Concern about the turnaround period for the county to provide the CBO with the outcome of the application.
- Is a MOU being developed to help outline the partnership between CFO and county departments regarding application assistance documentation?