

## Scope of Work Deliverables

### CalFresh Applications Submitted

#### Scope of Work Deliverable

*Submission of CalFresh applications (both paper applications and on-line applications) by your agency and/or subcontractors on behalf of a client and funded by the CFO plan.*

#### Definitions

An application submitted refers to the process of your agency or subcontractor submitting an application either on-line or paper to the County Welfare Office on behalf of the client. Agencies are encouraged to submit all applications online. Not only does this speed up the process for the applicant, it is easier for you to track your scope of work activities through the Community Based Organization (CBO) portal.

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. Contract agencies should work with their counties to ensure that they are submitting complete and accurate applications.

#### Documentation

Submitted 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 applications. You must also provide information on the following special populations:

- Seniors (age 60 and older)
- Working low-income households (a household that has earned income and meets program eligibility requirements including those for income)
- 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 household 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)

If the household falls into one or more categories for special populations then the client can choose the category or the outreach worker can select the special population. If the client declines to state or “Special Populations” does not apply to the household then the outreach worker can select “other/unknown” on the SOW Report spreadsheet.

## Suggested Strategies

- When submitting paper applications to the County there is no guarantee that the application can be tracked by the County or through the Consortia. Therefore, you are highly encouraged to submit applications online.
- When assisting clients, be familiar with the following concepts, terms, and definitions so that you can best assist your clients:
  - The CalFresh program: what it is, who it serves, how to apply, and the rights and responsibilities of clients
  - The word “household” as it applies to CalFresh
  - How household size is determined
  - Household gross and net income
  - The rules for deductions and proration
  - Special rules for people age 60 and older, people with a disability, students, immigrants, able-bodied adults without dependents, children in foster care, boarders, and individuals who are homeless
  - Supplemental Security Income/Supplemental Security Payment (SSI/SSP)
  - Confidentiality regulations
  - Prescreening questions (see [CalFresh Outreach Toolkit](#))
  - How to assist the client with their application if the applicant’s gross income and circumstances appear to be in line with eligibility guidelines
  - Expedited service
- Before Benefits Are Issued:
  - Encourage clients to write down the name and phone number of the County Eligibility Worker (EW) or the appropriate county contact at the local CalFresh office so that they can follow-up on their application. The EW’s name is listed on the letter that the client receives in the mail.
  - The client may need to provide additional information if the case is pending or is denied erroneously. The CalFresh outreach worker can follow-up with the EW on behalf of the client if he or she has a signed release of information from the client. Refer to the CalFresh Outreach Basics Handbook, [Worksheet G](#) for a sample release of information.

## Resources

- CalFresh Outreach Toolkit (<http://www.cdss.ca.gov/calfreshoutreach/PG3213.htm>)
  - [Applications Submission Check List](#)
  - [Prescreening Form](#)
  - [Application Submission Checklist Elderly/Disabled Deductions](#)
  - [Sample Release of Information](#)

## CalFresh Applications Approved

### Scope of Work Deliverable

*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.*

### Definitions

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 should be totaled in aggregate on the CalFresh *SOW Report spreadsheet* for each submitting agency. Applications are not tracked on an individual basis, but are tracked in aggregate. Your contract does not require that individual applications be tracked, only the aggregate total of approved applications during the period covered by the SOW Report spreadsheet. Aggregate numbers of both submitted, approved and pending applications can be tracked using the Community Based Organization (CBO) portal or by working with the county to determine the process that works best for the county to supply application approval data to your agency.

The numbers taken from your CalFresh *SOW Reporting spreadsheet* will be used to calculate how you are doing as compared to the scope of work numbers included in your contract. Your program analyst will review your *SOW Report* totals and discuss your progress.

The contractual expectation is that you complete at least 75% of your contracted SOW for approved applications.

### Suggested Strategies

- All counties utilize one of three Statewide Automated Welfare Systems--SAWS Consortium (LEADER, C-IV, and CalWIN) that allow individuals to apply for benefits and manage their cases.
- LEADER, [C-IV](#), and [CalWIN](#) have CBO Portals that allow CBOs to track, in aggregate, the number of assisted applications, pending applications, approved applications and denied applications.
- Become familiar with the SAWS system(s) that you will utilize 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

### Scope of Work Deliverable

*SAR 7 forms or CalFresh Recertification Applications submitted by your agency and/or subcontractors on behalf of a client.*

### Definitions

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

### Documentation

SAR 7 forms or CalFresh Recertification Applications are self-reported and must be included 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.

### Suggested Strategies

#### After Benefits Are Issued

- Identify paperwork due dates with the client by having them mark the due date on a home calendar and ensuring the client has the contact information for their EW.
- Show the client what the Notices of Action from the county look like and read through these notices to explain them to the client.
- Answer questions that the client might have about the paperwork.
- Encourage clients to drop off the required reports to the local CalFresh office in person and get a receipt.
- Use a mailer to remind clients when their SAR 7 and their Recertification Application are due. Ensure that confidentiality measures are in place to protect sensitive information.
- Use an internal tracking log or database to keep track of when clients are due for their SAR 7 and their recertification.

## Partnering and General CFO Activities

### Scope of Work Deliverable

*Partnering with counties and CBOs to address barriers to participation and meet the overall goals of the CFO Plan. These agencies may include, but are not limited to: Area Agency on Aging, Women Infants and Children program, First 5, Project Lean, UC Cooperative Extensions, Local Health Departments and schools. This deliverable also includes:*

- *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 will be described on your [Mid-year](#) and [Annual narrative](#) progress reports:
  - Document outreach events, partnerships and trainings.
  - Note successes, best practices and challenges in administrating your program and working with clients, counties, and other agencies.