



Scope of Work-- What We Do 2017 - 2018



Opening Announcements

- Program Guides and Operations Manual are available on Outreach website
- We have new forms and processes this year that should streamline SOW reporting
- Contract/Program Analyst Pairings

<http://www.cdss.ca.gov/calfresh/outreach/Default.htm>



Program Goals

- Assist people applying for CalFresh
- Raise awareness of CalFresh and the benefits of the program
- Help address myths and barriers
- Importance of maintaining benefits



Things to Know

- Expedited service
- Determination of household size
- Household gross and net income
- Special rules for people age 60 and older, on Supplemental Security Income/Supplemental Security Payment (SSI/SSP), students, certain immigrants, able-bodied adults without dependents, children in foster care, boarders, and individuals who are homeless



<http://www.cdss.ca.gov/calfreshoutreach/PG3332.htm>

What is a Good Application?

- Applications should be submitted **online**, should be **complete** and include **documentation**.
- An application submitted by a client is **not** considered an application submitted by the agency.



Semi-Annual Report (SAR 7) Forms and Annual Recertifications (Triple RRR)

- The household Eligibility Status Report
- The households must complete, sign and send to the County, once a year or they can lose benefits.



Suggested Strategies -- Applications

- Meet with the county to understand their priorities, needs and outreach goals
- Because CDSS will provide approval rate data, there is no need to contact counties for approval data.



Other Strategies



- Create or use a system to remind clients when their SAR 7s and RRRs are due.
- 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.
- As a best practice you may want to track Electronic applications by saving Confirmation Numbers (Source ID).

Partnering and General CalFresh Outreach (CFO) Activities

- Support counties to meet the overall goals of the CFO Plan.
- Distribute CFO approved materials to inform low-income, potentially eligible households about CalFresh eligibility.
- Participate in local collaborative meetings to promote CFO.
- Provide training and technical assistance to other agencies.

Let's shake it off!



POSE



PAUSE



POUNCE



BOUNCE



SOW Reporting

- CBO's Report Electronic Submitted Applications on the CDSS-provided SOW Report template for each invoice period.
 - Locate your organization on CBO Custom Reports that CDSS provides and report the Electronic submitted application count.
- CBO's Self-report the number of submitted applications for:
 - Paper
 - SAR 7
 - RRR

Approved Applications

- Once a CBO submits the SOW Report, CDSS will finalize the Electronic Approved application count from CBO Custom Reports
 - CDSS will report the paper approval estimates to the CBO once complete.
- Paper Application Approval rates will be the same as the overall Applying Agency's (Prime) Electronic approval rate during the same reporting period.

Electronic Approval Rate Calculation

- CDSS uses the following formula to calculate the approval rate per each reporting period.

$$\frac{\text{Approved Electronic Apps}}{\text{Approved Electronic Apps} + \text{Denied Electronic Apps}}$$



Electronic Applications

- All counties utilize one of three Statewide Automated Welfare Systems--SAWS (LEADER, C-IV, and CalWIN) that allow individuals to apply for benefits online and manage their case.
- CBOs utilizing CBO Portals appropriately will see their electronic applications in CBO Custom Reports.





CalWIN Reports – 18 Counties

- Alameda
- Contra Costa
- Fresno
- Orange
- Placer
- Sacramento
- San Diego
- San Francisco
- San Luis Obispo
- San Mateo
- Santa Barbara
- Santa Clara
- Santa Cruz
- Solano
- Sonoma
- Tulare
- Ventura
- Yolo

C-IV Reports – 39 Counties

- Alpine
- Amador
- Butte
- Calaveras
- Colusa
- Del Norte
- El Dorado
- Glenn
- Humboldt
- Imperial
- Inyo
- Kern
- Kings
- Lake
- Lassen
- Madera
- Marin
- Mariposa
- Mendocino
- Merced
- Modoc
- Mono
- Monterey
- Napa
- Nevada
- Plumas
- Riverside
- San Bernardino
- San Benito
- San Joaquin
- Shasta
- Sierra
- Siskiyou
- Stanislaus
- Sutter
- Tehama
- Trinity
- Tuolumne
- Yuba

LEADER/LRS Reports – One County

- Los Angeles County



Setting Up an Account in CBO Portals

- C-IV – Best Practices document provided in the meeting invite and on the Outreach website.

<http://www.cdss.ca.gov/calfreshoutreach/PG3300.htm>

- LEADER/LRS – In-person training has been provided last week for contractors working in Los Angeles County.

- CalWIN – Best Practices on Outreach website.

<http://www.cdss.ca.gov/calfreshoutreach/PG3300.htm>

Agency Naming Conventions

- Maintain Agency names consistent in SOW Reports and in **CBO Application Assistance Portals**.
- Keep the agency's CBO Portal and SOW Report naming conventions up to date with CDSS.



CBO Custom Reports

- CDSS will make CBO Custom Reports available to contractors for review.
- Monthly reports provide the name of each agency per county, and the number of:
 - Submitted Electronic Applications
 - Processed Electronic (approved or denied)
 - Pending Electronic

CBO Custom Reports

CBO ID	Agency Name	County	Total Applications Submitted	Total Applications Approved	Total Applications Denied	Total Applications Pending
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Electronic Application Submission Process

- Each month the application assistor will submit applications to the county. Not all of the applications you submit in the month will be approved that month.



Electronic Application Outcomes Process

- Eventually, the CBO Custom Reports will show the status of all new electronic applications, either approved or denied.



Questions?



Submitting SOW Reports

- An invoice will be processed by CDSS if the SOW Report is submitted for the same reporting period.
- Please email the SOW Report as an **Excel** version to CalFreshAccess@dss.ca.gov.





SOW Report Naming Practice

- Name the SOW Report spreadsheets to accurately track each reporting period:

SOW_Agency_Reporting_Period_FFY_Template =

SOW_211SD_Quarter_1_2017.xlsx



Targeted Populations

- Households with children ➤ younger than 18 years old.
- Households with Seniors ➤ age 60 and older.
- Working low-income households ➤ have earned income.

Report Targeted Populations

- Select **all categories that apply** to each household application.
- Report each agency's total number of targeted populations per reporting period as tracked in the optional Tracking Tool.



Optional Individual Tracking Tool

- Optional tool has separate monthly tabs and a summary tab.

October				
Select FFY:		2017		
Enter Agency Name:		CBO name		
Enter Application Assistor:		Jane Doe		
Enter an "x" for all population categories that apply to each household. If none apply or unknown; leave blank, do not add spaces.				
Household	Electronic Application Conf. # (Source ID). OR "other" if paper/SAR7/RRR	Targeted Population		
		Household with Children <18 y.o.	Household with Seniors 60+ y.o.	Working Low-Income Household
1	Civ-32097845	x		x
2	other-paper		x	x
3	other-RRR		x	
4	Civ-35557845	x		x
5				

Summary Tab for Optional Tools

Year to Date						
FFY:	0					
Prime Contractor Name:	0					
Subcontractor Name:	0					
Month	Grand Total Household Applications Submitted (Electronic/Paper/SAR7/RRR)	Household Demographics Reported/Known	Targeted Population			
			Household with Children <18 y.o.	Household with Seniors 60+ y.o.	Working Low-Income Household	
October	4	4	2	2	3	
November	0	-	-	-	-	
December	0	-	-	-	-	
January	0	-	-	-	-	
February	0	-	-	-	-	
March	0	-	-	-	-	
April	0	-	-	-	-	
May	0	-	-	-	-	
June	0	-	-	-	-	
July	0	-	-	-	-	
August	0	-	-	-	-	
September	0	-	-	-	-	
YTD	4	4	2	2	3	

Optional Rollup Tracking Tool

October				
Select FFY:				
Prime Contractor Name:				
Subcontractor Name:				
Enter an "x" for all population categories that apply to each household. If none apply or unknown; leave blank, do not add spaces.				
Household	Electronic Application Conf. # (Source ID). OR "other" if paper/SAR7/RRR	Targeted Population		
		Household with Children <18 y.o.	Household with Seniors 60+ y.o.	Working Low-Income Household
1	Civ-347923487	x		x
2	other		x	x
3	other		x	
4	Civ-3543879584	x		x
5				

Location of SOW and Tracking Tool Templates

- The document templates are available to our CBOs on the Outreach website at:

<http://www.cdss.ca.gov/calfreshoutreach/PG3302.htm>

Thank You!

