



FRAMEWORK OF SOLUTIONS FOR CUSTOMER EXPERIENCE AND ACCESS: RESOURCE TOOL KIT 3.0

County Welfare Departments (CWDs) Guide

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES
CALFRESH AND NUTRITION BRANCH
EXPANDING CALFRESH TO SSI/SSP RECIPIENTS POLICY
IMPLEMENTATION

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CALFRESH ENDING SSI CASH-OUT SUMMER 2019

Framework of Solutions for Successful Implementation

Mission: Reducing hunger and poverty in California for seniors and people with disabilities.

Vision: Excellent customer service and access for all.



- Offer electronic signatures over telephone to accept and complete applications by telephone
- Offer customers flexible interview times by telephone
- Upgrade IVR menu and features:
 - Call back, self service



- Maximize Consortia's on-line and mobile application features:
 - Upload verifications, check application status, create accounts
- Promote GetCalFresh.org
- Offer same day service when applicants apply on-line, with telephone interview



- Welcome with Greeter/Customer Service Liaison to assist clients and actively manage lobby
- Upgrade lobby and line management tools
 - Signage, messaging, monitors, on-line terminals, telephones, kiosks
- Offer same day service when applicants come in to apply, with either an in office or telephone interview

STREAMLINE VERIFICATIONS

- Electronic verifications for identity, residence, and SSI income
- Standardized protocols for deductions for medical, dependent care, and shelter

PROVIDE ACCESS FOR ALL

- Reasonable accommodations in all doors
- Multi-language access in all doors
- Authorized representative processes in all doors

COLLABORATE TO HELP CLIENTS APPLY

- County staff from IHSS, Medi-Cal QMB/SLMB/QI-1 cases, multi-program outreach, and other local programs serving people on SSI
- CalFresh Outreach Application assisters, including food banks, area agencies on aging, independent living centers, and more
- All community partners can educate and refer

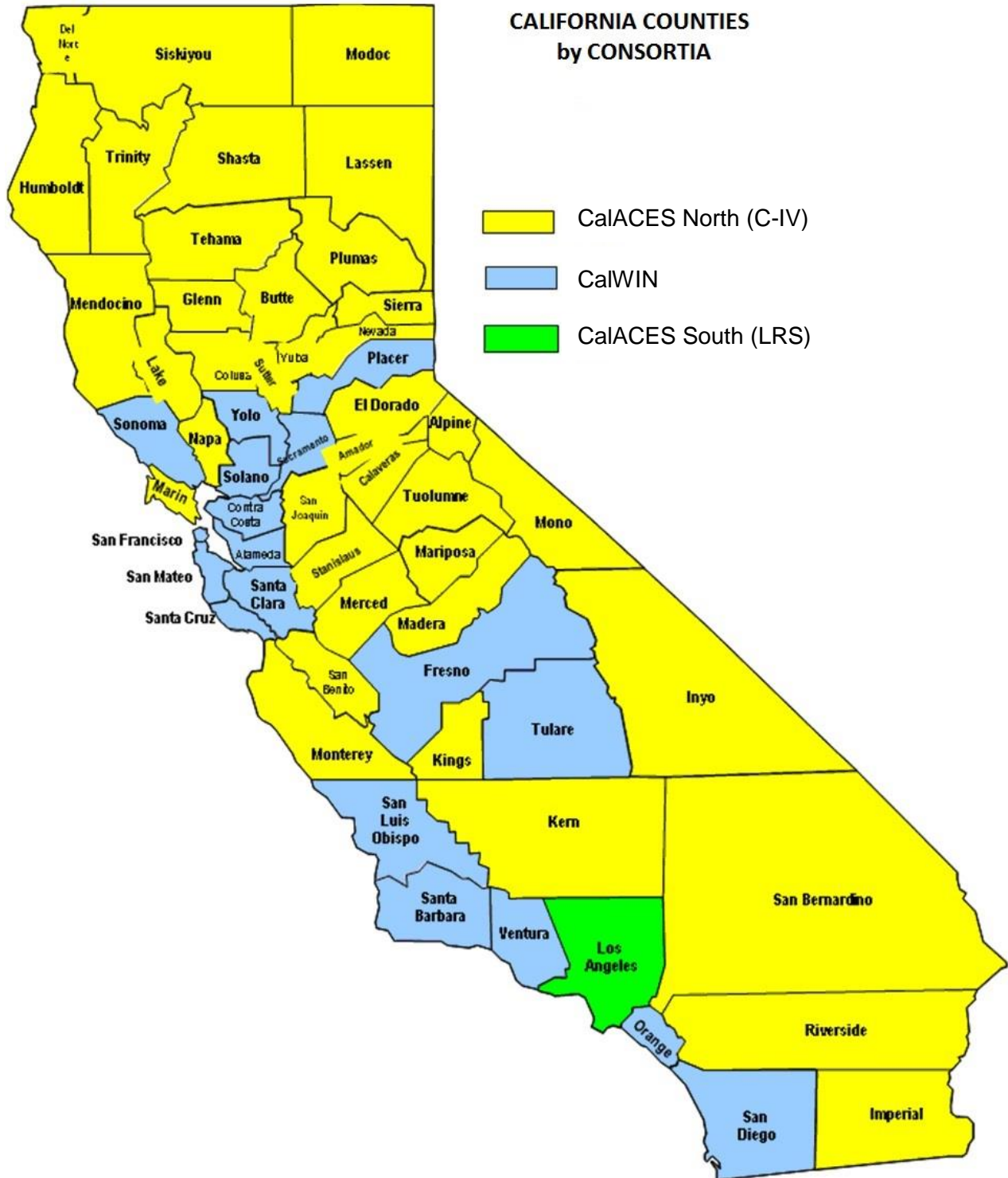
Get updates here: <http://www.cdss.ca.gov/CalFreshSSI>

Need more information? Send questions here: CalFreshSSI@dss.ca.gov

Statewide Automated Welfare System (SAWS)

The components of the SAWS Project are:

- CalWORKs Information Network (CalWIN)
- CalACES North (formerly C-IV)
- CalACES South (formerly LRS)



Introduction

Thank you for accessing the *Expanding CalFresh to SSI/SSP Recipients Resource Tool Kit* for County Welfare Departments (CWDs).

This tool kit is designed to supplement the previously released *CalFresh Ending SSI Cash-Out Summer 2019: Framework of Solutions for Successful Implementation*. The Framework of Solutions can also be found on this Resource Tool Kit. The *Call, Click* and *Come-In* model highlights three potential solutions for each access point. It is our intention that the Framework of Solutions, the Resource Tool Kit, and the Readiness Plan template will serve as useful tools to ensure a successful implementation of the expansion of CalFresh to seniors and people with disabilities, also known as the reversal of the CalFresh SSI/SSP Cash-Out policy.



1) CALL – Solution A: Electronic Signature

Capture an electronic signature over the phone in order to accept a complete CalFresh application over the phone. Acceptable methods of electronic signature include, but are not limited to, utilization of a Personal Identification Number (PIN) or a recording of a verbal affirmation.

Impact:

- Counties can accept a complete application by phone.
- Beginning date of aid is secured by phone.
- Improves likelihood of same day service by eliminating wait time for client to return a copy of the application with wet signature.
- Allows SSI/SSP recipients to apply for CalFresh without having to physically go into a county office, which may be challenging.
- Alleviates the influx of in-person applicants, reducing likelihood of lobby overcrowding and long in-person wait times.
- Provides another option to accept a CalFresh application; supporting administrative ability to balance workload associated with an influx of new applications during a short window of time.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including, but not limited to):

- Santa Cruz County – Intake Affidavit, SAR 7, and Recertifications
- Humboldt County – Intake, SAR 7, and Recertifications
- Sacramento County – Intake, SAR 7, and Recertifications
- Kern County – Intake and Recertifications

Key Point of Contacts:

Agency	Contact Name	Contact Email
Humboldt	Jason Wiensz	jwiensz@co.humboldt.ca.us
Sacramento	Linda Hoang	hoangl@saccounty.net
Santa Cruz	Deborah Bresnick	deborah.bresnick@santacruzcounty.us
Kern County	Angela Garcia	garciaan@kerndhs.com

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

Document(s):

- [APHSA – Never Get Behind Again: Old Thinking Through A New Lens](#)
- [ATC – E-Sign Accessibility Map for SSI November 2018](#)
- [ATC – Electronic Signatures: New Options for California](#)
- [ATC & CWDA – Telephonic Signature in California Counties](#)

Policy Guidance:

- [CDSS – ACL 17-57: Electronic Signatures in the CalFresh and CalWORKs Programs](#)
- [FNS – Accepting SNAP Applicant and Client Signatures Electronically](#)
- [FNS – May 12, 2014 Memorandum titled “SNAP Telephonic Signature Guidance”](#)
- [Kern County – E-Signature Policy](#)
- [Marin County – E-Signature Policy and Guidelines](#)
- [San Joaquin County – E-Signature Policy](#)

Presentation(s):

- [CDSS - CalFresh Policy: Don't Forget to Sign It!](#)
- [C-IV – Electronic Signature Design Overview](#)
- [FNS – Vision for California Call Centers](#)
- [Sacramento County – MACF Service Center](#)
- [San Diego County – Improving Customer Experience](#)
- [Santa Barbara County – Benefit Service Center](#)



1) CALL – Solution B: Flexible Interview

Offer flexible interview slots, within a prescribed window of time, by telephone.

Impact:

- Reduces the number of missed interviews by allowing the customer to complete the interview as convenient for them within a prescribed window of time.
- Reduces calls to the service center regarding missed interviews.
- Reduces the number of applications denied due to missed interviews.
- Has the ability to increase participation.
- Decreases lobby traffic.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including but not limited to):

- Stanislaus County
- Marin County

Key Point of Contacts:

Agency	Contact Name	Contact Email
Stanislaus	Teresa Baker	bakert@stancounty.com
Marin	D'Angelo Paillet	dpaillet@marincounty.org

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

Document(s):

- [ATC – Flexible Interview Scheduling: Five Innovative Models to Improve Access to the CalFresh Interview](#)
- [Marin County – CalFresh RE Demand Processing](#)
- [Stanislaus County – Appointment Letter](#)

Presentation(s):

- [Stanislaus County – Non Assistance CalFresh Recertifications: Flexible Interview Scheduling](#)



1) CALL – Solution C: Upgrade IVR

Upgrade Interactive Voice Response (IVR) menu and features, including call back, enhanced self-service options, and more.

Impact:

- Allows for prioritization based on client characteristics, such as receipt of SSI, which would allow the elderly and persons with disabilities to spend less time on hold.
- Allows for call routing based on client characteristics, which would allow customers to connect with county representatives that can better help them with their case.
- Alleviates the influx of in-person applicants, reducing likelihood of lobby overcrowding and long in-person wait times.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including but not limited to):

- San Bernardino County – Call back feature with voice authentication
- San Diego County – “back door” number for CBO’s

Key Point of Contacts:

Agency	Contact Name	Contact Email
San Bernardino	Dina Christiansen	dchristiansen@hss.sbcounty.gov
San Diego	Ronda Fikes	ronda.fikes@sdcounty.ca.gov
Los Angeles	May Gayton-Jacob	MayGayton-Jacobs@dpss.lacounty.gov

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

Document(s):

- [FNS – Call Center/Contact Center Support for States: A Framework and Reference Guide](#)
- [Monterey County – IVR Flow Chart](#)
- [Sacramento County – Medi-CalFresh Service Center Operations Manual: Chapter 3 – Call Handling Process](#)
- [San Bernardino County – Customer Service Center](#)

Presentation(s):

- [San Bernardino County – Super Self-Service Options](#)
- [San Bernardino County – Predictive Handling & Visual IVR](#)



2) CLICK – Solution A: Maximize On-Line & Mobile Features

Maximize on-line and mobile application features including, but not limited to, ability to upload verifications, check application status, and create accounts.

Impact:

- Allows customers to submit a complete application through mobile app or desktop computer.
- Reduces lobby and call center traffic to complete tasks that may be done online or via mobile app, such as submitting verifications or checking status of application.
- Reduces call center volume for those checking status of their case.
- Provides convenient access for customers who may not have transportation to visit an office in-person or time to wait on the telephone to speak to a county representative.
- Provides a digital receipt so verification documents are less likely to get lost.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including, but not limited to):

- San Mateo County – Customers can complete an Online Customer Service Survey
- Santa Barbara County – Customers can submit verifications using the Outbound Communication Tool Online Providing Uploaded Submissions (OCTOPUS)
- Los Angeles County – Customers can submit verifications and link them to their case

Key Point of Contacts:

Agency	Contact Name	Contact Email
San Mateo	Brenda Gutierrez	bgutierrez@smcgov.org
Santa Barbara	Diana Guerra	d.guerra@sbcsocialserv.org
Los Angeles	Inez Cabrera	Inezcabrera@dpss.lacounty.gov

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- [Los Angeles County – Apply for CalFresh Webpage](#)
- [San Mateo County – Apply for CalFresh Webpage](#)

Document(s):

- [Santa Barbara County – Verification Process for GetCalFresh and OCTOPUS](#)
- [CDSS Online Application Tips](#)



2) CLICK – Solution B: GetCalFresh.org

Promote client friendly application process through GetCalFresh.org.

Impact:

- Customers can apply through a streamlined process.
- Community partners, that may not be as familiar with CalFresh, may be more likely to assist SSI recipients using the streamlined process.
- Allows SSI/SSP recipients to apply for CalFresh without having to physically go into a county office, which may be challenging.
- Alleviates the influx of in-person applicants, reducing likelihood of lobby overcrowding and long in-person wait times.
- Provides another option to accept a CalFresh application; supporting administrative ability to balance workload associated with an influx of new applications during a short window of time.
- Reach wider range of customers who may otherwise not apply.
- Counties that have promoted GetCalFresh.org have seen a significant increase in on-line applications.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including but not limited to):

- San Diego County
- Ventura County

Key Point of Contacts:

Agency	Contact Name	Contact Email
San Diego	Ronda Fikes	ronda.fikes@sdcounty.ca.gov
Ventura	Margarita Cabral	margarita.cabral@ventura.org

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

- [GetCalFresh.org Demo Webpage](#)

Presentation(s):

- [GetCalFresh – Code for America Presentation](#)



2) CLICK – Solution C: Same Day Service

Provide same day service when applicants apply on-line or by telephone.

Impact:

- Provides customers with an opportunity to apply for CalFresh without having to go into a local office.
- Increases the likelihood that applications will be completed and potentially approved.
- Reduces future call backs to customers if they are helped the same day they apply.
- Potentially reduces the overall time spent on application processing.
- Supports the ability to be approved the same day.
- Economically vulnerable individuals will be less food insecure.

CWDs Currently Utilizing this Solution (including but not limited to):

- Santa Clara County – Call placed to customer same day that electronic application is received to conduct interview
- Contra Costa County – Call placed to customer same day that electronic application is received to conduct interview

Key Point of Contacts:

Agency	Contact Name	Contact Email
Contra Costa	Deborah Teixeira	dteixeira@ehsd.cccounty.us
Los Angeles	Andy Nguyen	andynguyent@dpss.lacounty.gov
Santa Clara	Kamille-Angelita Reddy	kamille-angelita.reddy@ssa.sccgov

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

Document(s):

- [Santa Clara County – Online Application Flow Chart](#)



3) COME IN – Solution A: Greeter

Greeter/customer service liaison provides warm welcome and actively manages lobby to triage client needs.

Impact:

- Make customers feel welcome.
- Properly trained greeters would have the skills to be able to assist SSI recipients with cognitive and physical disabilities.
- Assist customers by providing immediate assistance with directions and general information.
- ADA compliance is understood and prioritized.
- Direct customers to appropriate line.
- Ensure customers with easily resolvable needs are screened for accommodations and provided the appropriate service.
- The ability to triage the lobby to ensure SSI recipients do not wait in long lines due to health concerns.

CWDs Currently Utilizing this Solution (including but not limited to):

- San Joaquin County – Roaming greeter with tablet
- Sonoma County – Navigators in the lobby
- San Bernardino County – Worker with iPad triaging and clearing customers in the lobby

Key Point of Contacts:

Agency	Contact Name	Contact Email
San Joaquin	Brenda Maimone	bmaimone@sjgov.org
Sonoma	Valerie Campbell	vcampbel@schsd.org
San Bernardino	Dina Christiansen	dchristiansen@hss.sbcounty.gov
Los Angeles	Araceli Dominguez	AraceliDominguez@dpss.lacounty.gov

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

Document(s):

- [San Bernardino County – Intake Process](#)
- [San Joaquin County – Roaming Greeter Station Image](#)



3) COME IN – Solution B: Lobby & Line Management Tools

Upgrade lobby and line management tools including, but not limited to, signage, messaging, monitors, on-line terminals, telephones, and kiosks.

Impact:

- Kiosks may streamline the check-in process.
- Kiosks with online access and telephones may promote submission of an application online or by telephone, reducing wait times for in-person interaction and improving workload management
- Reports can be generated to assist management in increasing program operation efficiency.
- Multiple communication tools, such as an intercom combined with a monitor, ensure that all clients (e.g. those with hearing or visual impairments) are able to effectively communicate with county representatives as needed
- Lobby signage reduces client confusion by utilizing fonts and images that are easy to read and understand.
- Lobby signage is posted in multiple languages.
- Improves customer experience.

CWDs Currently Utilizing this Solution (including but not limited to):

- Riverside County
- Los Angeles County – Lobby signage, expedited processing for customers requiring accommodations
- Yuba County – Lobby signage, priority area in lobby for the elderly and people with disabilities
- Kern County – Designated line for customers requiring accommodations

Key Point of Contacts:

Agency	Contact Name	Contact Email
Kern	Angela Garcia	garciaan@kerndhs.com
Los Angeles	Araceli Dominguez	AraceliDominguez@dpss.lacounty.gov
Riverside	Israel Vasquez	IVasquez@rivco.org
Yuba	Lovena Decamp	cw_cf_ppoc@co.yuba.ca.us

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

Document(s):

- [Riverside County – Lobby/Line Management Tool Image](#)



3) COME IN – Solution C: Same Day Service

Provide same day service in lobby, with an in-person or telephone interview.

Impact:

- Increases program access for all customers.
- Reduces number of missed interviews.
- Provides access to benefits sooner for customers.
- Saves the customer from repeated trips to the county office.
- Economically vulnerable individuals will be less food insecure.

CWDs Utilizing this Solution (including but not limited to):

- Santa Clara County
- Sacramento County
- Yuba County
- San Bernardino County

Key Point of Contacts:

Agency	Contact Name	Contact Email
Los Angeles	Araceli Dominguez	aracelidominguez@dpss.lacounty.gov
Sacramento	Linda Hoang	hoangl@saccounty.net
San Bernardino	Dina Christiansen	dchristiansen@hss.sbcounty.gov
Santa Clara	Kamille-Angelita Reddy	kamille-angelita.reddy@ssa.sccgov
Yuba	Lovena Decamp	cw_cf_ppoc@co.yuba.ca.us

Resources (e.g. reports, studies, documents, handbooks, workflows and other supplemental resource materials):

Document(s):

- [San Bernardino County – Intake Process](#)
- [Yuba County – CalFresh Application Workflow](#)

4) STREAMLINE VERIFICATIONS

Streamline electronic verifications for identity, residence, and SSI income. Standardize protocols to claim deductions for shelter, and if applicable, medical or dependent care.

Impact:

- Streamline customer experience with CalFresh.
- Reduce delays processing deductions and increase available benefits to customer.
- Better reflect a customer's need for food assistance, by identifying all deductible expenses.
- Process influx of applications more efficiently.
- Decrease customer confusion with consistent protocols statewide.

CWDs Currently Utilizing this Solution:

-

County Key Point of Contact (to provide more information regarding implementation):

Agency	Contact Name	Contact Email
Los Angeles	Araceli Dominguez	aracelidominguez@dpss.lacounty.gov

Resources (Please enter the names of or attach reports, studies, documents, handbooks, workflows or any other supplemental resource materials for inclusion in final Resource Tool Kit):

Document(s):

- [CDSS – CalFresh and Nutrition Branch: Standard Medical Deduction Annual Report \(Oct 2017 – Sept 2018\)](#)
- CDSS CalFresh Senior Enrollment Initiatives Flyer Template ([English](#)) ([Spanish](#))
- CDSS CalFresh Standard Medication Deduction Flyer Template ([English](#)) ([Spanish](#))
- Ventura County – [CalFresh Medical Expense Deduction Flyer](#) (English/Spanish)

- Ventura County – [CalFresh Medical Expense Deduction Poster](#) (English/Spanish)

Policy Guidance:

- CDSS – [ACL 17-35 \(April 25, 2017\): CalFresh Standard Medical Deduction Demonstration Project for Elderly/Disabled Households](#)
- CDSS – [ACL 19-44 \(May 9, 2019\): CalFresh Application “Joint Processing” by Social Security Administration and County Welfare Departments](#)

Presentation(s):

- CDSS – Policy Refresher: CalFresh Eligibility Rules for Elderly and/or Disabled Individuals ([Presentation Slides](#)) ([Recorded Webinar](#))
- CDSS – Policy Overview: “Joint Processing” of CalFresh Applications by SSA and CWDs ([Presentation Slides](#)) (Recorded Webinar-pending)

5) PROVIDE ACCESS FOR ALL

Ensure that reasonable accommodations are provided when needed, written and verbal support is available in multiple languages for non-English speakers, and an effective process to identify Authorized Representatives is in place, all across all points of program entry.

Impact:

- Allows all eligible customers to access CalFresh food, income support, and opportunity.
- Increase customer experience satisfaction for all Californians.
- Reduce barriers to participation or lower customer experience satisfaction for some groups of Californians.

CWDs Currently Utilizing this Solution:

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County Key Point of Contact (to provide more information regarding implementation):

Agency	Contact Name	Contact Email

Resources (Please enter the names of or attach reports, studies, documents, handbooks, workflows or any other supplemental resource materials for inclusion in final Toolkit):

Policy Guidance:

- CDSS – [ACL 19-49 \(May 20, 2019\): CalFresh Forms and Notices Updates Due to Expansion of CalFresh to Supplemental Security Income Recipients](#)
- CDSS – ACL: CalFresh Rules for Authorized Representatives (forthcoming)

Presentation(s):

- CDSS – [Policy Refresher: CalFresh Rules for Authorized Representatives](#)
- CDSS – [Introduction to ADA and Reasonable Accommodations](#)

- CDSS – Access for All Guest Speaker Webinar Series: Serving People in Multiple Languages & Welcoming Immigrants ([Presentation Slides](#)) ([Recorded Webinar](#)) ([Closed Captioning Transcript](#))
- CDSS – Access for All Guest Speaker Webinar Series: Serving People with Disabilities ([Presentation Slides](#)) ([Recorded Webinar](#)) ([Webinar Handout](#))
- CDSS – Access for All Guest Speaker Webinar Series: Serving Diverse Communities and Advancing Racial Equity ([Presentation Slides](#)) ([Recorded Webinar](#)) ([Closed Captioning Transcript](#))
- CDSS CalFresh/SSI Data Dashboard: Key Indicators for Sub-Groups (forthcoming)

6) COLLABORATE TO HELP CLIENTS APPLY

Collaboration between county staff outside of CalFresh (In-Home Supportive Services, Medi-Cal Qualified Medicare Beneficiary/Specified Low-Income Medicare Beneficiary/Qualified Individual-1 cases, multi-program outreach, and other local programs serving people on SSI), CalFresh Outreach Application Assisters (food banks and other local charities, area agencies on aging, independent living centers), and all community partners can educate and assist clients to apply.

Impact:

- Allows for customers to learn about and apply for CalFresh benefits through a network of diverse and trusted partners.
- Provides customers with an opportunity to apply for CalFresh without having to go into a local office or call the county to get started, which may be particularly helpful for seniors and people with disabilities.
- Counties may be able to reduce the volume of in-person or telephone applications, if other county program staff and community assisters are able to assist with applications (particularly via on-line), which can assist counties with managing the high-volume of new applications anticipated after implementation.

CWDs Currently Utilizing this Solution:

- Counties piloting IHSS Strategies: TBD
- Counties with CFO assisters currents: 57 counties
- Counties with GetCalFresh on-line assisters currently: 37 counties

County Key Point of Contact (to provide more information regarding implementation):

Agency	Contact Name	Contact Email

Resources (Please enter the names of or attach reports, studies, documents, handbooks, workflows or any other supplemental resource materials for inclusion in final Toolkit):

- CDA/Local Area Agencies on Aging Agreement to assist with applications (in progress)

- DOR/Local Independent Living Center Agreement to assist with applications (in progress)
- DDS/Local Regional Centers Agreement to assist with applications (in progress)
- CDPH/Local Community Nutrition Action Plans Agreement to assist with outreach and healthy living programs (in progress)
- SSA Local Office Role in CalFresh Application Screening, Assistance, and Outreach (in progress)

Document(s):

- CDSS – Expanding CalFresh Food to SSI Recipients ([English](#)) ([Spanish](#))
- CDSS – [CalFresh Outreach Tool Kits for Older Adults, People with Disabilities, and Caregivers](#)
- CDSS – [CalFresh/SSI Data Dashboard Summary of On-Line, Assister and GetCalFresh Applications](#) (Monthly Participation)
- Alameda County – [Partner Engagement Survey](#)
- Placer County – [CBO Agenda](#)
- Riverside County – [EBT Scam Flyer](#) (English/Spanish)
- San Bernardino County – [CBO Agenda](#)
- San Diego Hunger Coalition – [CalFresh Task Force Agenda](#)
- San Diego Hunger Coalition – [SSI Partner Fact Sheet](#)
- San Mateo – [EBT Scam Flyer](#) (English/Spanish)
- Santa Cruz County – [CBO Agenda](#)
- Ventura County – [EBT Scam Flyer](#) (English/Spanish)

Presentation(s):

- CDSS – Application Assister Webinar: CalFresh 101 ([Presentation Slides](#)) ([Recorded Webinar](#))
- CDSS – [Application Assister: About GetCalFresh.org](#)