Process Map Exercise

<u>Eligibility Process Map</u>

Challenges
- Drug Felons and Timed-Out clients – How to engage in work activities to count toward WPR, since they are not eligible for WTW?
- Section 8 – Clients serving a WTW sanction, HUD should align program regulations so serving a sanction is not desirable to the client
- WPR not priority at Intake – Workers priorities are to complete intake and grant case
- HSSs to enter more income/employment information when processing QR7 for accurate WPR reporting
- Align QR7 processing dates to AMPR processing date (20th of each month), so data is entered by same date
- CalWIN System issue – Lifting WTW sanctions
- HSS not lifting WTW sanctions timely
- Disengaged clients – Clients that refuse to participate

Opportunities
- Timely case assignment of closed cases from ECM to closed bank
- Timely assignment at granting versus banking the case
- WTW Referrals
  - Granted – Processing QR7, HSS to verify proper WTW registration status (i.e., ensure client is registered or exempt as appropriate)
  - Intake – Run Exemptions on all cases and assign to appropriate WTW regions
  - Training needed for HSS on WTW referrals
  - Ensuring both parents properly referred to WTW
  - Timely Referrals (Registration date to match CalWORKs approval date)
  - WTW Referrals to be completed per CPG
- Exemptions
  - Allowing ECMs to enter exemption information in CalWIN
  - CW61 given to clients at Intake
  - CalWIN System – overriding automatic exemption for Pregnancy
  - Intake – Supervisor reviews to focus on identifying follow through on exemptions
  - CalWIN System – workers having problems entering/removing exemptions
  - Timely entries of exemption entries in CalWIN – hinders WTW from doing their job duties
  - Change Regulations – Onset of exemption declared by Doctor entered as start date of exemption versus the date exemption information is received
- Upfront Engagement
- ICTs – how do they hurt WPR, how can we handle to ensure they don't count against us
- Orientation
  - Lobby Video at FRC on client Success Stories & Importance of Employment to family
  - "Group Granting" – When clients pick up first benefit check, ECMs complete Orientation and assign to activity
  - ECM located at FRC to screen CW applicants at intake for WTW
  - Schedule WTW Orientation simultaneously as HSS makes referral to WTW
- Improve Communication between HSS/ECM
  - Utilize Email, Phone messages and GAIN Notification form
  - Sanction/Sanction Cure request from ECM, increase communication to HSS during this process
  - User-to-User Alert – can it be researched and tested to be used as a communication tool?
- Provide HSS with the AMPR rollup report so they know where each region is in meeting participation rates.

Successes
- WTW/FRC liaison to communicate between programs (North Inland Best Practice)
- Sanction/Sanction Cure requests faxed to centralized Clerical person at FRC, who then communicates to HSS

Employment Services Process Map

Challenges

- North County Transit system needs expanding (bus routes decreased since the Sprinter)
- ECMs unwilling to give clients with hardships proper help (including supportive services)
- Case Transfers between regions not completed timely
- WTW Referrals – entire process is a challenge for WTW, as they rely 100% on HSS
- Exemptions
  - Entering/removing exemptions, accurate WTW registration status
  - WTW case remains in closed bank after exemption ends
  - Timely entries of exemption information
- Client Barriers
  - Language
  - Resolving barriers prior to Job Club – effect participation
  - Basic Education
  - Criminal records
- Client 'no show' to WTW orientation appointment
- Colleges promoting education and not work – conflicting message to clients
- Rescinding, imposing and curing sanctions timely by HSS (CalWIN system issues)
- Conflicting regulations between childcare and WTW – Stage 2 only requires 20 hours of participation

Opportunities

- Implement review process for exempt and inactive WTW cases to ensure proper registration status
- CalWIN generates Notices, but with wrong information
- Sanction Population – collaboration with section 8 to ensure correct grant information received
- Lack of training to WTW staff on childcare regulations
- Supportive Services – issuing timely, workflow impacts
- Client Barriers – increased number of the harder to serve (utilizing BHIP to assist)
- Automatic notices sent to clients by CalWIN (versus current manual process) for participation hours
- Improve Communication between HSS/ECM
  - User-to-User Alerts – ways to make more effective
  - Narrate and update CalWIN timely so both workers know client status

Successes

- FRC/WTW liaison at North Inland
- Senior Mentor Program Implemented for sanctioned clients
- Updated policy on ECMs ability to update employment screens in CalWIN
- Emphasis on work incidental supports
- Resources/information on expected end date of WTW exemptions is readily available, to reactivate clients to WTW
- Increased participation rates

WPR Data Process Map

Challenges

- CalWIN accuracy
- CalWIN Alerts
- WPR Report distribution – to know San Diego's WPR
- WTW referrals

Opportunities

- WPR Training for ECMs and HSSs
- WPR Labs to be every other month
- AMPR accuracy

Successes

- WPR Lab
- ECMs at annual renewals to cure sanctions

Best Practices/Bottleneck Exercise

Best Practices
- ECM to attend RRR for sanctioned clients
- ECMs to attend CW section monthly meetings (identify WTW issues at meeting with HSS)
- Intake – Training on WTW referrals and how to resolve 'pending' programs
- Senior Mentors for sanctioned clients
- Training on WTW Referrals – HSS/ECM together in a 4 hour, monthly training.
- CPG Updates/How To's – Form a workgroup. All regions bring material to identify most current and assist SPOS in updating all material
- WTW referral dates – establish procedures, if referral done after the 20th of month-register client to WTW on the 1st of following month
- Creation of letter asking sanctioned clients how they are meeting financial needs
- Update Housing form to include sanction information
- Include WTW in the CAC Chronicle
- WTW/FRC liaison at each site
- Case-flow – Monthly timeline of needed case actions for HSS and ECMs
- Good Cause criteria to include Late Referrals
- Develop a Sanction list, give to a centralize staff person at FRC to ensure follow-up
- Establish a uniformed method of communication between HSS/ECM
- OJT for HSS – shadow ECMs, complete a WTW Orientation, observe Job Club
- Focused case reviews for WPR criteria
- CalWIN User Sub-Workgroup – identify a representative at each FRC and WTW to attend

Bottlenecks
- Invite Eligibility staff to the monthly WTW Case Management Meeting (hosted by SPOS)
- Invite Eligibility staff to the AMPR meeting (hosted by SPOS)
- Share regulations on housing and sanctions (Eligibility to have a Housing Liaison)
- ICTs – effects on WPR?
- Current regulations on Exemption onset date is restrictive
- Training on WTW Referrals needed
- CPG /How To's outdated, unable to train new staff when material is not current
- WTW Referral dates - End of month referrals effect participation rates of ECMs
- AMPR accuracy (logic in CalWIN). Late referrals don't give a lot of time to engage
- Noncompliance Process – Training needed for HSS to understand each step (desk aid)
- Good Cause criteria to be updated
- ECM to notify HSS timely of noncompliance information:
  - Reason for initiation (failure to attend appt)
  - Notice sent to client
  - Determination appointment date and 20-day deadline
  - Date Sanction is to be imposed
- Train on communication between HSS/ECM
- Language difference between HSS/ECM – ECMs to eliminate jargon in communication, be concise on requests, state the action to be taken
- Centralized staff member responsible to ensuring sanctions lifted
- Log of WTW referrals needed provided to HSS
- Look @ other States/Counties on Best Practices on upfront engagement
- 'Work First' message to be given to clients at intake
- CalWIN functionality – Exemptions and Sanctions
- CalWORKs initial training – An OJT day to be spent at WTW
- Better Case Comments by HSS/ECM to know exactly what is going on in case

Regional Implementations

East
- ECM to attend RRRs. FRC to look into scheduling 'group' RRRs for sanctioned clients, so ECMs time is utilized efficiently
- ECMs to attend CW section meeting. El Cajon – 3rd Thursday at 1:30
- Identify a Housing Liaison at each region

North Central
- OJT – HSS New hires to spend an OJT day at WTW. Current HSS to schedule time to do OJT at WTW as well.
- ECMs to attend RRRs
- FRC Orientation – add piece on curing sanctions, create a video for WTW

North Coastal
- Identify a Housing Liaison, include cash aid grant prior to sanction
- Call the Help Desk for CalWIN issues related to Alerts
- CalWIN User Sub-Workgroup – identify HSS and ECM representative to attend
- HSS to ensure release of information completed by client on CW61, for direct contact with doctor
- ECMs to remove jargon in communication to HSS, use plain language

North Inland
- ECM to attend monthly section meetings at FRC
- ECM to attend RRR
- Monthly meetings for FRC/WTW managers

South
- Improve clearing and using alerts
- WTW Referral training
- ECM at RRR

Central
- Identify a FRC/WTW liaison. Creation of sanction/exemptions lists, liaison to follow up on list
- WTW Referral training
- Section 8 housing form – Jose Valenzuela to assist in updating form, will send to all for input, SPOS to approve and include in program forms.