

**County of San Diego, Health and Human Services Agency (HHS)**  
**Eligibility Policy and Procedures Guide**

**WorkWell San Diego (WWSD) Standardized Continuing Process**

**Page**

1 of 4

**Revision Date:**

10/01/2020

**Background:**

In order to provide excellent customer service and consistency of utilization of staff and the standardization of work assignments across all Family Resource Centers (FRCs) and Community Resource Centers (CRCs), standardized continuing processes are necessary. This policy is being revised to include language references only.

**Purpose:**

The purpose of this document is to provide guidance to staff on the standardization of the Continuing process.

**Policy:**

With the implementation of WorkWell San Diego (WWSD) business practices, all locations are required to combine the processing of all continuing tasks and adhere to the below standardized business processes. This policy has been updated for sunset date review with no changes.

**Procedure:**

All Continuing Human Services Specialists (HSSs) will process tasks associated with continuing assignments. HSSs will be responsible for processing tasks in all programs in which they have been trained. All staff will be trained in at least three programs (i.e. CalWORKs (CW), CalFresh (CF) and Medi-Cal (MC)).

**Recertification/Renewal/Redetermination (RRR) Interview**

All Continuing HSSs are responsible for processing all RRRs received in person, through the mail, through MyBenefitsCalWIN, or any other source.

For CW, CF/MC, and CF RRRs, the Continuing Office Assistant (OA) will:

- Schedule RRRs on a master schedule
- Send out the RRR appointment notice to the customer
- Assign the RRR to a Continuing HSS using the Work Management System (WMS)

For MC RRRs, the Continuing OA will:

- Clear the Daily RRR Received and Daily RRR Status Reports on a daily basis
- If the RRR packet is received
  - OA will assign the RRR to a Continuing HSS using the Work Management System (WMS)
- If the RRR packet is not received
  - A robo call will go out to the customer
  - If no contact is made, the case will automatically close for no RRR

**RRR Interviews**

For CW and CF/MC telephone interviews:

- Scheduling OA will notify the assigned HSS of the appointment
- HSS phones customer for interview at scheduled date and time
  - HSS completes interview

**County of San Diego, Health and Human Services Agency (HHS)**  
**Eligibility Policy and Procedures Guide**

**WorkWell San Diego (WWSD) Standardized Continuing Process**

**Page**

2 of 4

For CW Face to Face (F2F) Interviews:

- If customer arrives for RRR
    - OA will assist the customer with check-in through the Lobby Management system
- OA will notify the HSS (and appropriate backup staff, i.e. Supervising Human Services Specialist (SHSS) that customer has arrived for RRR appointment
- HSS will make contact with the customer and complete the RRR
    - HSS reviews MEDS system
    - Updates caseload ID to corresponding RRR month

**Note:** To the greatest extent possible, RRRs will be processed prior to NOA cutoff.

**No Shows**

When the customer fails to appear for a F2F appointment or is unreachable for a telephone interview, the following process will be followed:

- For CW interviews
  - If customer does not attend the scheduled RRR appointment
    - Assigned HSS will discontinue the case
  - If case closes for no RRR, the assigned HSS will
    - Send out a Medi-Cal RRR packet to the customer
    - Attempt a phone call to the customer to process the Medi-Cal RRR
    - Allow 30 days for the customer to return the RRR packet if not reached by phone
    - If packet is returned
      - The Medi-Cal RRR is assigned for processing by the scheduling OA
    - If packet is not returned
      - MC portion of case will discontinue
- For CF interviews
  - HSS will send out the NOMI letter
- For CF/MC interviews
  - For CalFresh – HSS will send out the NOMI letter
  - For Medi-Cal – HSS processes RRR as mail-in

**Note:** General Relief (GR), Cash Assistance Program for Immigrants (CAPI) and County Medical Services (CMS), see related program guide for instructions

**Status Reports (SR)**

All Continuing HSSs are responsible for processing all SR received in person, through the mail, through MyBenefitsCalWIN, or any other source. All HSSs assigned to the continuing task are responsible for processing SRs.

- For walk-in customers submitting SR, reception OA will:
  - Bar code scan the SR
  - Provide the customer with a receipt
  - Image the SR immediately in house
- Continuing Team OA will assign SR assignment using the Work Management System (WMS)
- HSS will process SR
- For all other source types, the Continuing OA will assign SR's to the continuing HSS using the WMS
- HSS will process SR accordingly

**County of San Diego, Health and Human Services Agency (HHS)**  
**Eligibility Policy and Procedures Guide**

**WorkWell San Diego (WWSD) Standardized Continuing Process**

**Page**

**3 of 4**

**Note:** To the greatest extent possible, SRs will be processed prior to NOA cutoff.

Changes

All Continuing HSSs are responsible for processing changes.

- For walk-in customers:
  - If change falls within Standardized Protocol timeframe, Customer Service (CS) HSS will process change at the window or during desk time

If change does not fall within Standardized Protocol, CS SHSS will determine how to assign it

- If the customer is no longer in the lobby, the CS SHSS will transfer the change request to the Continuing SHSS via email. The change request will then be assigned to a Continuing HSS
- If the customer is in the lobby and the request requires immediate action, the CS SHSS will make immediate verbal referral/contact to the Continuing SHSS for assignment of the change request
- For all other source types, the Continuing OA will assign changes to the continuing HSS using WMS
- HSS will process changes accordingly

**Note:** Change requests will be processed within 10 business days.

The HSS will update WMS upon completion of assigned RRRs, SRs, change requests, and other tasks as assigned.

The SHSS will monitor WMS for timeliness and completion of assignments.

**Note:** When SHSS authorization is required for any case during the processing of a continuing task, the HSS processing the task will email their SHSS requesting review and authorization. The SHSS will then email the HSS informing the HSS of the completed authorization or any further actions that need to be taken prior to authorization. HSS will review MEDS, alerts, and change caseload ID.

Continuing Assignment

WMS will assign tasks in specific order by received date. Prioritization of assignments will occur in the tool and tasks will be assigned accordingly. The monthly RRR workload of staff assigned to continuing task will reflect a proportional distribution dependent on volume of RRRs received and operational needs.

**Note:** Tasks assigned may slightly vary for each location based on their workloads and staff assigned. Continuing assignments received by Health Coverage Access (HCA), County Medical Services (CMS), and Cash Assistance Program for Immigrants (CAPI), or General Relief (GR) will be managed by a caseload assignment.

Various Reports/Special Projects

The Continuing SHSS has the discretion to assign various reports and special projects to specialized HSSs or to all HSSs assigned to Continuing. The Continuing SHSS will review the various tasks for

County of San Diego, Health and Human Services Agency (HHS)
Eligibility Policy and Procedures Guide

WorkWell San Diego (WWSD) Standardized Continuing Process

Page

4 of 4

assignment. Continuing OAs will assign the various tasks to the specialized HSS.

Please see the WWSD Specialized Task Standardization Process Guide for complete details as to the function of specialized tasks HSSs.

Sunset Date:

This policy will be reviewed for continuance by 9/30/2023

Approval for Release:

Handwritten signature and date: Rick Wanne, 10-6-20

Rick Wanne, Director
Eligibility Operations