

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

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

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**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 intake processes are necessary. This policy is being revised to include recent updates.

**Purpose:**

The purpose of this document is to provide guidance to staff on the standardized intake process. This policy has been updated for sunset date review with no changes.

**Policy:**

With the implementation of WorkWell San Diego (WWSD) business practices, all FRCs and CRCs are required to adhere to the standardized business policy stated in this document.

All applications will be accepted during the working hours of 7:00 a.m. to 5:00 p.m.

**Procedure:**

All Intake Human Services Specialists (HSSs) will process tasks associated with Intake 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)).

**Clearing and Scheduling**

When an application is received, the following process will be followed:

- When an applicant comes into an office to apply, a Lobby Management system ticket will be issued and will be directed by the Ambassador to the application packets in the lobby in order for them to complete while they are waiting for their Lobby Management system ticket number to be called
- All Applications will be reviewed for completeness
  - Applications filled out in the FRC will be turned in at the reception window and date/time stamped by the reception Office Assistant (OA) as well as reviewed for completeness

Applications submitted via mail or the drop box will be date/time stamped by the Initial Assessment Team (IAR) OA

- All Applications will be forwarded to the IAR team for
  - Clearing – to be done by OA
  - Cases found to be within 30 or 90 days of a prior denial/discontinuance will be reviewed to determine if a new application is appropriate or if the case will be returned to the last FRC of record to reevaluate – to be done by Human Services Specialist (HSS)
  - App/Reging – to be done by OA
  - Contact the customer for CFES/IN and basic eligibility review – to be done by HSS
    - Denial if found ineligible
  - Scheduling – to be done by OA
    - Intake Assignment Tool (IAT) will be used for scheduling appointments
    - Appointment date and time will be entered in case comments
    - CalWORKs (CW), CalFresh (CF) and CF/MC combos will be scheduled for phone interviews as the first option. A face to face (F2F) appointment may be scheduled if specifically requested by the customer

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- Applicant will be provided with an appointment letter/checklist and a brief description of what documents will be needed at the interview
- Pending banks monitored for non walk-in applications – to be done by OA

**Notes:** All non walk-in applications will be given the same priority as walk-in applications. Applications dropped off after close of business will be date stamped for the next business day. Applications received by Health Coverage Access (HCA), County Medical Services (CMS), Cash Assistance Program for Immigrants (CAPI), or General Relief (GR) will be managed by a caseload assignment.

**Intake Appointment Check-in (In Person)**

If the applicant returns to the FRC for a F2F intake appointment, the following process will be followed:

- Customer will check in at the Ambassador Station or Lobby Management system kiosk
  - If customer checks in at Ambassador Station, the Ambassador will assist the customer with checking into Lobby Management system
- OA will monitor Lobby Management system queue and check for customer arrivals
- Upon applicant arrival, scheduling OA will assign intake to HSS
- HSS will make contact with the customer within 15 minutes of their scheduled intake appointment time and conduct the interview
- Based upon operational need, the Supervisor may adjust HSS intake order of assignments to ensure customer needs are met
- If applicant arrives more than 15 minutes late, a new appointment will be given
- Standby appointments may be utilized at the FRCs/CRCs discretion
- Staff Adjustment Factor (SAFs) may be utilized at the FRCs or CRCs discretion

If the application is scheduled for a non F2F interview, the following process will be followed:

- Scheduling OA will notify the assigned HSS of the appointment at least 15 minutes prior to the appointment
- If MC only, assigned HSS will follow the MC mail-in process already established
- If CW, MC/CF combo or CF only, assigned HSS will phone the customer at the scheduled appointment time
  - If unable to reach the customer, a message will be left with the HSS's name and contact information requesting a return call
  - A second phone call will be made 5 minutes after the first call if no return call is received from the customer. A third phone call is made 5 minutes later
  - If HSS is unable to reach the customer, HSS will treat the application as a no show and follow the no show process below

**No Shows**

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

- For a CF F2F interview
  - Scheduling OA informs the IAR HSS that the customer failed to show for the interview
  - IAR HSS denies CFES if applicable and sends NOMI
  - IAR HSS monitors pending bank and denies case at end of 30 days
  - IAR HSS emails SHSS for review of denial
  - IAR HSS transfer case to closed bank

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- For CF telephone interview
  - Assigned HSS denies CFES if applicable and sends NOMI
  - Case is returned to IAR HSS to hold for 30<sup>th</sup> day review
  - IAR HSS denies case at end of the 30 days if customer does not reschedule
- For a CW F2F interview
  - Scheduling OA informs the IAR HSS that the customer failed to show for the interview
  - IAR HSS denies CW application
  - IAR HSS emails IAR SHSS for review of denial
  - IAR SHSS approves or disapproves denial action and emails HSS with ok to authorize or further action needed
  - HSS moves case to closed caseload bank after denial action is authorized
- For CW telephone interview
  - Assigned HSS denies the CW application
  - HSS moves case to closed caseload bank after denial action is authorized
- For Combo CF/MC telephone interview
  - Assigned HSS denies CFES if applicable and sends NOMI
  - CF portion of case is returned to IAR HSS to hold for 30<sup>th</sup> day review
  - MC portion of case is processed by the assigned HSS following the mail-in application process

CW and CF no show appointments are assigned a Medi-Cal mail in application as replacement.

**Authorization**

When the intake case is granted or denied the following process will be followed:

- If the case requires SHSS authorization
  - HSS will email the SHSS
  - SHSS reviews case and authorizes, if no further work is needed on case
  - HSS reviews MEDS, clears alerts and confirms case is active
  - HSS will bank case. If case is returned by SHSS to HSS for further work, SHSS will change case back to intake HSS worker number
- If the case does not require SHSS authorization
  - HSS authorizes case
  - HSS reviews MEDS, clears alerts and confirm case is active
  - SHSS reviews case
  - HSS will bank case when case is sent to SHSS for review. If case is returned by SHSS to HSS for further work, SHSS will change case back to intake HSS worker number

**Intake Assignment**

Each HSS will be scheduled 6 hours of intakes per day, four days per week and no more than 2 hours of intakes one day per week. Intakes will be assigned out based on HSS availability and appointment time though the Intake Tool.

Based on operational needs additional intake hours may be required and continuing staff may be reassigned as deemed operationally necessary.

The HSS will be responsible for all applicant calls or requests while the case is still assigned to their caseload ID number. Calls must be returned within one working day (as outlined in the Human Services Specialist Performance Expectations).

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**Sunset Date:**

This policy will be reviewed for continuance by 09/30/2023

**Approval for Release:**

 10-6-20

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Eligibility Operations