

**County of Orange Social Services Agency  
Family Self-Sufficiency**

**Program/Area:** CalWORKs/Welfare-To-Work

**Title:** CalWORKs/Welfare-To-Work/Cal-Learn Monthly Contacts

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**PURPOSE**

A monthly contact between Welfare-to-Work (WTW) Case Managers (CMs) and work-eligible WTW participants, or between Continuing Workers and WTW-exempt CalWORKs (CW) recipients, will occur to encourage dialogue and exchange of information, thereby fostering the participant's success in the WTW program.

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**POLICY**

A monthly contact will occur between the CM and the WTW participant. If the client meets WTW exemption criteria and is not assigned to a CM, a monthly contact will occur between the Continuing Worker and the CW recipient beginning 60 days before the exemption is expected to end.

As appropriate, the contact should:

- Build rapport between the parties,
- Educate the participant/recipient about CW/WTW program requirements and time limits,
- Inform the participant of his/her time left on the CW Month Time Limit,
- Document participation requirements, including WTW activities and hours of participation,
- Provide information about exemption criteria and the duration of any existing WTW exemption,
- Identify barriers to participation and ways to resolve them, including referrals to services such as Behavioral Health, Domestic Abuse, and Family Stabilization.

During the contact, the CM or Continuing Worker should:

- Support the participant/recipient and encourage new or continued participation in WTW activities,
  - Reinforce availability of supportive services,
  - Be positive and motivational, and utilize strength-based techniques to encourage participant/recipient responsibility and self-sufficiency,
  - Provide constructive feedback.
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**WTW/Cal-Learn  
CASE MANAGER**

CMs will complete a monthly contact with each WTW/Cal-Learn participant in their caseload, including a minimum of two face-to-face contacts per year. The face-to-face contacts should occur approximately every six months. Monthly contacts may take place in person or on the telephone, and must be

documented in CalWIN Case Comments. The WTW/CalLearn CM will document the outcome of the monthly contacts, utilizing one of these available tools:

- The [Case Manager Monthly Contact Checklist \(F063-41-225\)](#)
- [The Cal-Learn Case Manager \(CM\) Monthly Contact Checklist \(F063-41-331\)](#)
- The Client Engagement System (CES)

### **Client Engagement System (CES):**

County CMs document monthly contacts via the Client Engagement System (CES).

- For **all not met cases**, CMs will be required to complete all monthly contact entries in CES and virtually print the Monthly Contact Checklist from the CES into OnBase.
  - Once a monthly contact is initiated, County CMs will update the Task Status/Outcome in CES to “In Progress” if follow-up is needed or verification is pending.
  - When verifications/follow-up items are received and all actions for a monthly contact are completed, County CMs will update the Task Status/Outcome to “Completed” by the end of the month.
  - CM is unable to obtain verification or make adequate follow-up action to complete the monthly contact, the Task Status/Outcome will remain as “In Progress” and this will indicate that an attempt was made to complete the monthly contact. At the end of the month, in addition, CM will update the Task Status/Outcome to “Unsuccessful” in the “Participation Info” tab and virtually print the form into On Base if required.
- For **met** cases, ChMs will only be required to disposition the met cases as “Completed” in CES without completing other monthly contact entries. ChMs will continue to complete Case Comments in CalWIN.

Refer to the [CES User Guide – WOW/Cal-Learn Monthly Contacts](#) and [On Base Virtual Print Instructions](#) for more information.

**NOTE:** Contracted ChMs are not utilizing CES monthly contact and will be required to complete a monthly contact, document on the [F063-41-225](#) or [F063-41-331](#) and image into OnBase.

Monthly contacts may take place:

In the office - A face-to-face office interview may occur when:

- A program requirement must be addressed, such as noncompliance or revision of the WTW Plan,
- The participant is scheduled to meet multiple workers or on-site providers (i.e. the CM sees the participant in coordination with a scheduled appointment with the Continuing Worker).

In the field - Face-to-face interviews may occur at a WTW participant's home, place of employment, or another prearranged location. They should be arranged to accommodate the WTW participant's schedule. A face-to-face interview in the field may be necessary when:

- The participant's job hours prevent him/her from coming into the SSA office,
- A Domestic Abuse Social Worker or a Children and Family Services Social Worker requests a joint home visit,
- Loss of contact with the participant occurs, including no response to phone or mail contacts,
- There is unknown progress towards self-sufficiency. The CM must assess the participant's WTW progress, circumstances, and possible barriers,
- Concerns are raised about the family's well-being (based on observations by the CM or partners working with the participant).

By telephone – Telephone contacts may be initiated by the CM or participant, and can be conducted during months in which a face-to-face contact does not take place. Telephone contacts may occur when:

- The CM follows up on new or existing supportive service needs,
- The participant is working and contacts the CM to request supportive services,
- The participant reports a situation that may change participation in current WTW activities.

**NOTE:** A written message requesting that the participant contact the CM is to be sent when the CM has made two documented unsuccessful attempts to reach the participant by phone or in person. A [Case Manager Monthly Contact Checklist \(F063-41-225\)](#), the [Cal-Learn Case Manager \(CM\) Monthly Contact Checklist \(F063-41-331\)](#), or the Client Engagement System Monthly Contact **and** CalWIN Case Comments are to be completed after the third unsuccessful contact.

### **TWO-PARENT HOUSEHOLD CASE:**

- Both parents participate, sharing hours: Two monthly contacts are required; one for each parent.
- One parent participates, one parent exempt or SMP (Spouse Meeting Participation): Only one monthly contact required for the participating parent. Complete the following CES entries for the participating parent:

- Case Type: Select “Two-Parent, only one participating”
- Second Parent Status: Select “SMP” or “WTW Exempt” as appropriate
- Complete monthly contact as appropriate for participating parent only
- No further action is needed for the second parent
- Update the Task Status/Outcome.

**PROJECTING  
EMPLOYMENT  
PARTICIPATION  
HOURS**

Prior to completing the monthly contact, it is the CM’s responsibility to:

- Review CalWIN
- Review OnBase
- Communicate with the Continuing Worker to verify if the WTW participant has provided income verifications and if the participant is meeting the required number of participation hours

The CM may use the pay-stubs and/or income verifications on file to project hours for up to a six (6) month period. If the pay-stubs and/or income verifications are on file, and the CM has confirmed the participant is meeting the required number of participation hours for employment, the CM **will not** request additional pay-stubs and/or income verifications from the participant during the monthly contact. Refer to [Period of Projected Hours Processing Guide](#) for detailed instructions.

**NOTE:** For cases that have a combination of employment and non-work activities, verification of non-work activities must be verified on a monthly basis. Only employment hours can be used to project work participation.

**SOCIAL  
SERVICES  
SUPERVISOR I –  
WTW  
SUPERVISOR**

In an effort to ensure the monthly contacts are completed timely and accurately, the WTW Supervisors – Social Services Supervisors I (SSSI’s) are required to re-review the monthly contacts completed by the CMs. Refer to [CES WTW Supervisor Review Processing Guide](#) and [CES Supervisory User Guide – Reviewing Monthly Contacts](#).

**CONTINUING  
WORKER**

Continuing Workers will complete a monthly contact with WTW-exempt CalWORKs recipients beginning 60 days before the exemption is expected to end. The contact may take place in person or on the telephone, and must be documented on the [Continuing Worker 60/30-Day Checklist \(F063-41-226\)](#).

Monthly contacts may take place:

In the office - A face-to-face office interview may occur when the recipient is scheduled to meet with the Continuing Worker, multiple workers, or on-site providers (i.e. the Continuing Worker sees the client in coordination with a scheduled appointment with the BHS worker, or during an MDT meeting).

In the field - Face-to-face interviews may occur at a client’s home or another

prearranged location. They should be arranged to accommodate the client's schedule. A face-to-face interview in the field may be necessary when:

- A Domestic Abuse Social Worker or a Children and Family Services Social Worker requests a joint home visit,
- Loss of contact with the client occurs, including no response to phone or mail contacts,
- The Continuing Worker must assess the client's circumstances, and potential barriers to self-sufficiency,
- Illness of the client or another family member prevents an office visit from taking place.

By telephone – Telephone contacts may be initiated by either the Continuing Worker or recipient.

**Note:** A written message – [Message from your worker](#) requesting that the participant contact the Continuing Worker is to be sent when the Continuing Worker has made two documented unsuccessful attempts to reach the participant by phone or in person. Refer to [Correspondence - Manually Generate Form or Other Client Correspondence Resource Guide](#).

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**CASE COMMENTS  
AND CONTACT  
DOCUMENTATION**

Monthly contacts will be recorded on the [Case Manager Monthly Contact Checklist \(F063-41-225\)](#), the [Cal-Learn Case Manager \(CM\) Monthly Contact Checklist \(F063-41-331\)](#), the Monthly Contact in Client Engagement System (CES), or on the [Continuing Worker 60/30-Day Checklist \(F063-41-226\)](#). Completed checklists will be imaged into OnBase if required.

Information documented on the [Case Manager Monthly Contact Checklist \(F063-41-225\)](#) includes, but is not limited to:

- Participant's name,
- Total months used on the CW Month Time Limit,
- WTW Participation status,
- Assigned WTW activities,
- Weekly scheduled participation hours,
- Monthly Actual participation hours,
- Good Cause for not participating in WTW activities,
- Barriers to participation and Supportive Services addressed and appropriate referrals are completed, and
- Follow-up action taken.

Information documented on the [Cal-Learn Case Manager Monthly Contact Checklist \(F063-41-331\)](#) includes, but is not limited to:

- Participant's name,
- Assigned activities,
- Weekly scheduled participation hours,
- Monthly Actual participation hours,
- Good Cause for not participating in assigned activities,

- Barriers to participation and Supportive Services addressed and appropriate referrals are completed, and
- Follow-up action taken.

Information documented on the [Continuing Worker 60/30-Day Checklist \(F063-41-226\)](#) includes, but is not limited to:

- Participant's name,
- Total months used on the CW Month Time Limit,
- Exemption status,
- Referrals needed/requested to assign a CM,
- WTW participation status,
- Barriers to participation and Supportive Services addressed and appropriate referrals are completed, and
- Follow-up action taken.

As appropriate, the CalWIN system must be updated to reflect information obtained during the monthly contact, including, but not limited to attendance, activity status, noncompliance, etc.

All contacts (face-to-face or telephone call) and unsuccessful attempts to contact the participant, including correspondence attempts, must also be documented in CalWIN Case Comments. Refer to CalWIN Resource Guides: [Case Comments](#) for detailed instructions.

Safety issues or extenuating circumstances that prevent the CM or Continuing Worker from making a monthly contact with the participant must be documented in CalWIN Case Comments.

**Note:** At the end of the month, the CM or Continuing Worker will update the status of all Monthly Contacts that are "In Progress" which tasks have been initiated but not completed and image the form into OnBase. Refer to the CES User Guide – WTW/Cal-Learn Monthly Contacts and [OnBase Virtual Print Instructions](#) for more information.

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## ATTACHMENTS

1. [Case Manager Monthly Contact Checklist \(F063-41-225\)](#)
  2. [Cal-Learn CM Monthly Contact Checklist \(F063-41-331\)](#)
  3. [Continuing Worker 60/30-Day Checklist \(F063-41-226\)](#)
  4. [CES Supervisory User Guide – Reviewing Monthly Contacts](#)
  5. [CES User Guide – WTW/Cal-Learn Monthly Contacts](#)
  6. [CES WTW Supervisor Review Processing Guide](#)
  7. [OnBase Virtual Print Instructions](#)
  8. [Period of Projected Hours Processing Guide](#)
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