

**County of Orange Social Services Agency
Family Self-Sufficiency & Adult Services Division**

Program/Area: CalWORKs/Special Services
Title: **FSS and CFS Mutual Clients Collaboration**
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PURPOSE The purpose of this policy is to provide guidelines for collaboration between two Social Services Agency (SSA) divisions, Children and Family Services (CFS) and Family Self-Sufficiency/Adult Services (FSS/AS), to support clients who have both an open CFS case and an open or pending CalWORKs case. These clients will be referenced as mutual clients.

POLICY Collaboration between CFS and FSS ensures coordinated case planning necessary to assist mutual clients in overcoming interconnected issues such as poverty and child maltreatment. This is achieved through early identification of mutual clients coupled with early coordination of services between CFS and FSS which is beneficial for both the agency and the mutual client through reduced duplication of effort, more streamlined access to services, and consistent expectations for clients navigating the CalWORKs and Child Welfare systems.

DEFINITIONS

Mutual Client - an individual who has been working with a CFS Senior Social Worker and also has an open or pending CalWORKs case.

CalWORKs Case Manager (CM) – FSS/AS worker assigned to provide case management and support for the CalWORKs recipients in their Welfare-to-Work (WTW) case.

CalWORKs Specialized Case Manager (CM) – FSS/AS worker assigned to provide case management and support for CalWORKs clients in specialized units who are participating in special CalWORKs WTW programs such as Domestic Abuse Services or Family Stabilization.

CalWORKs Eligibility Technician (ET) – FSS/AS worker assigned to an exempt CalWORKs case.

Intake Employment Eligibility Specialist (IEES) – FSS/AS worker assigned to assist new applicants in the determination of CalWORKs (CW), CalFresh (CF), Medi-Cal (MC) eligibility, and supportive services.

Continuing Employment Eligibility Specialist (CEES) – FSS/AS worker assigned to determine continued CW, CF, and MC eligibility, as well as supportive services.

FSS Regional Contact – FSS/AS assigned supervisor at the CalWORKs Regional office to serve as a liaison for CFS to contact regarding the name of the assigned CalWORKs worker for mutual client cases.

CFS Senior Social Worker – CFS worker assigned to provide case management and support the CFS case.

CONFIDENTIALITY Information and document sharing between CFS and FSS/AS is permitted and shall be encouraged in the coordination of case planning to serve the best interests of the mutual client. Confidential information shall be shared between CFS and FSS/AS staff as needed for mutual client cases. Sharing information between CFS and FSS does not require a signed release from the mutual client as all staff involved are part of the Social Services Agency (SSA). Information and documents obtained from CFS should be virtually printed and filed under the DASU/Mutual Client in the system which houses confidential information contained in all client files and has restricted access.

MUTUAL CLIENT IDENTIFICATION Early identification of a mutual client is critical to the coordinated case planning process between CFS and FSS/AS. At first contact with a new client, the IEES/CEES/CM will inquire if the client has an open CFS case. Similarly, CFS Senior Social Workers will inquire if the client has applied for or is receiving CalWORKs assistance.

The following describes when mutual clients are identified by CFS and FSS:

CFS

- When a Child Abuse Registry (CAR) report is received and “disposed” to Emergency Response (ER) for investigation
- Upon receipt of a referral or case transferred by another program within CFS

FSS/CalWORKs

- When a new application or re-application for CalWORKs is received
- During the Redetermination Recertification Review (RRR) process
- When a transferred CalWORKs case is received

Note: The [Mutual Client Processing Guide](#) outlines the step-by-step details for mutual client identification by FSS/AS.

COORDINATED CASE PLANNING PROCESS Mutual clients will have both a CFS case plan and a CalWORKs WTW plan. To maximize benefits for the mutual client as well as avoiding duplicate of services, it is essential that the two case plans be developed in collaboration between the CalWORKs CM and CFS Social Worker. This Coordinated Case Planning process ensures that the goals and activities which are outlined in each plan intersect and complement one another, resulting in reduced duplication of effort and more streamlined access to services for the participant(s).

The following describes the Coordinated Case Planning process between CFS and FSS:

Children and Family Services (CFS)

Unit Clerk/ Data Entry Technician (DET) Responsibilities –

- Clear parent(s) in Shadow Database.
- Determine CalWORKs assigned worker name and contact information.
- Note: If the CalWORKs assigned worker is unknown, contact the FSS/AS Regional Social Services Supervisor IIs (SSSII) to determine the name of the assigned CalWORKs worker for the mutual client case.
- Enter name and contact information of assigned CalWORKs worker on the CAR referral form or on the Case Transfer form if case is with another program within CFS.
- Add CalWORKs assigned worker name and contact information to the Service Providers listed in CWS/CMS.

CFS Social Worker Responsibilities –

- When a mutual client has been identified through the case clearing process, contact the CalWORKs worker to discuss the following:
- Client's participation in WTW if applicable and identify any services the client is already receiving through CalWORKs
- Request a copy of the WTW plan from the CalWORKs CM
- Additional services that are needed by the client and make appropriate referrals
- Requirements and/or activities outlined in the CFS case plan to determine if any changes or updates are needed for the participant's WTW plan
- As appropriate, provide the CalWORKs CM with a written description of the CFS case plan goals and activities to determine any impact to the mutual client's WTW plan.
- If any aspect of the CFS case plan should be included in the WTW plan, advise the CalWORKs CM of the hours the mutual client is to participate in the CFS case plan activity. Discussions regarding any supportive services needs the mutual client may have such as child care or transportation shall also occur.
- While the CFS case remains open, the CFS Social Worker must contact the CalWORKs CM when any child(ren) is removed from the home, or when there have been any significant changes to the mutual client's circumstances such as housing status or family/household composition.

Family Self-Sufficiency/Adult Services (FSS/AS)

The Data Entry Technician (DET) Hub, IEES, CEES, and CalWORKs CM all have specific responsibilities regarding mutual client identification as outlined in the [Mutual Client Processing Guide](#).

Note: All mutual client cases will be transferred to a specialized worker.

Specialized CM Responsibilities –

- Once the CalWORKs case has been identified as a mutual client, and the contact information for the assigned CFS Social Worker is confirmed, the CM must contact the CFS Social Worker by email or telephone to:
 - Advise the CFS Social Worker that the mutual client is receiving CalWORKs services and required to participate in WTW activities unless otherwise exempt
 - Discuss the participant's WTW plan in terms of activities and hours of participation required of the participant
 - Discuss and review elements of the participant's CFS case plan
 - Coordinate needed supportive services and make appropriate referrals
 - Develop a new WTW plan or modify an existing WTW plan as needed based on the elements of the CFS case plan
 - Include "CFS Activities" in the WTW plan
- If necessary, provide a copy of the participant's WTW plan to the CFS Social Worker.
- Maintain ongoing communication with the CFS Social Worker to discuss status of activities in the CFS case plan and WTW plan. Any significant changes to the participant's circumstances should be immediately discussed to re-evaluate participation in WTW activities.

CalWORKs Eligibility Technician (ET) Responsibilities –

If the CalWORKs case is excluded from WTW, and involves a mutual client, the assigned ET must provide any information requested by the CFS Social Worker which may include, but is not limited to:

- Reason for exemption and expiration date
- Grant amount
- Household composition

WTW PLANS, GOOD CAUSE, EXEMPTION, NONCOMPLIANCE, AND SANCTION

Mutual client participation in WTW activities is required, unless otherwise exempt or the participant is participating in a program that provides temporary waivers such as [Domestic Abuse Services](#) or [Family Stabilization](#).

Welfare-to-Work Plan

[Welfare-to-Work Plans \(WTW 2\)](#) for mutual clients should be tailored to support the CFS case plan. When developing the WTW plan, the CM will discuss WTW

activities with the CFS Social Worker. Whenever possible, the CFS case plan activities should be incorporated into the WTW plan and listed as a WTW activity in the WTW plan.

Example: A mutual client is required under CalWORKs to participate in at least 30 hours per week of approved WTW activities based on their family composition. The same mutual client also has required participation hours under their CFS case plan of 15 hours per week. The coordinated case plan would include 15 hours of “CFS” activities and 15 hours of participation in other WTW activities to meet the 30 hours per week requirement. This coordinated effort prevents the mutual client from being required to participate in 45 hours per week of activities.

CFS case plan activities may include [CalWORKs Behavioral Health Services, Domestic Abuse Services](#), or other activities which should be listed as “CFS” in the WTW plan. Factors to consider when developing the WTW plan include, but are not limited to:

- Legal obligations or court-related matters
- Cultural and/or religious needs
- Substance abuse, medical and/or mental health issues
- Parenting issues
- Domestic abuse
- Family Reunification (FR) - refer to [policy 403A CalWORKs Family Reunification Services, Mutual Client vs. Family Reunification Comparison Chart](#) for more information

The WTW plan will be discussed with the participants after the CM and CFS Social Worker have agreed on the WTW activities the mutual client is assigned, hours of participation, and identified supportive service needs. Mutual clients are to be notified that their WTW activities will fulfill requirements outlined in both their CFS case plan and WTW case plan.

Good Cause/Exemptions/Noncompliance/Sanction

Good Cause or Exemption from participating in WTW activities may be granted on a case-by-case basis as appropriate.

The CM may grant the mutual client Good Cause from participating in WTW activities based on the recommendation of the CFS Social Worker. This may occur when the mutual client has multiple court dates, visitation requirements that involve out-of-county travel, or while referrals to appropriate services are being processed but are not yet in place.

When a mutual client, whose WTW plan includes participation in CFS activities, is noncompliant with those requirements, the CM and CFS Social Worker should collaborate to determine if Good Cause exists before initiating noncompliance. If Good Cause is found, the noncompliance process ends and a sanction is not imposed. Refer to [Policy 240 Noncompliance Process](#) for additional information.

The CM may make a recommendation to the IEES/CEES that the mutual client should be exempt from WTW activities based on whether the individual has a condition that qualifies as an exemption as outlined in policy 100-F1 [Welfare-to-Work Exemptions](#). Exemptions should be reviewed when changes are reported or when the exemption expires.

CHILDREN AND FAMILY TEAM MEETING

Children and Family Team (CFT) is a group of individuals that include the child/youth, family members, caregivers, CFT Facilitator, Social Worker, professionals, and other individuals identified by the family or agency.

Children and Family Team meeting (CFTM) is a team-based approach to supporting the child/youth and family towards their goals and a safe transition out of the child welfare system.

CFTMs provide a platform that gives voice to the strengths and needs of the child/youth and families. CFTMs also strengthens connections to resources and networks that help the child/youth and families address challenges and achieve success and well-being. Each CFT member plays a critical role in the youth/family achieving success.

CFS ROLE

- CFS coordinates and invites required members of the CFT to attend the in-person or virtual CFTMs.
- At the request of the CFS Social Worker, the CFTM Scheduler sends an email invitation to the designated FSS/AS staff, in consideration of the following criteria:
 - Youth/family identified as potential Mutual Clients of FSS & AS and CFS.
 - Youth/family has an open Welfare-to-Work (WTW)/ CalWORKs case.
 - Resources/support services is a potential need for the youth/family.
- Attached the partially completed CFT Plan that includes the name(s) and date of birth(s) of the child(ren)/youth(s) and parent(s) name(s) to the invitation. The CFT Plan also notes the CFTM discussion topics such as, child safety/risk, family reunification/maintenance barriers, foster care placement, and resources/services.
- The CFT Facilitator leads the CFTM and engages stakeholders in the discussions.
- After the CFTM, the CFT Facilitator documents the attendance of CFTM participants and CFTM outcomes, in accordance with state mandate. The CFT Facilitator may share a summary of the meeting with the attending CalWORKs staff.

FSS/AS ROLE

- Attend all CFTMs, upon request.
- Upon receipt of the invitation to a CFTM, FSS/AS staff will confirm that a CalWORKs representative will attend.

- In preparation of the CFTM, FSS/AS staff will review the CFT Plan for the names and date of birth and complete a system search to clear the youth/family.
- During the CFTM, FSS/AS staff will engage the family by sharing a brief verbal overview related to potential eligibility for public assistance programs such as CalWORKs, CalFresh, and Medi-Cal, as well as services that include, but not limited to Women and Infant Child (WIC) program, Home Visiting Program, childcare, ancillary, and housing. In addition to the verbal overview, an SSA Public Assistance Programs flyer will also be provided to the appropriate youth/adult or emailed to the assigned CFS Social Worker.
- In cases where the youth/family has a Family Reunification plan, FSS/AS staff will explain additional services and resources that the youth/family may be eligible to receive. Refer to policy [403A CalWORKs Family Reunification Services](#).
- Offer their contact information to further assist with the public benefits application process, Mutual Client coordinated services, or other community service referrals.
- Follow the required steps of the FSS & AS [Mutual Client Processing Guide](#)

ATTACHMENTS [Mutual Client vs. Family Reunification Comparison Chart](#)

REFERENCES [Policy 100 F1 Welfare-to-Work Exemptions](#)
[Policy 211 Welfare-to-Work Plans](#)
[Policy 240 Noncompliance Process](#)
[Policy 401 CalWORKs Behavioral Health Services](#)
[Policy 402 Domestic Abuse](#)
[Policy 403A CalWORKs Family Reunification Services](#)
[Policy 407 Family Stabilization](#)
[Mutual Client Processing Guide](#)