

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

**Program/Area:** CalWORKS/Welfare-To-Work  
**Title:** Transportation Supportive Services  
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**Status: Approved**  
**Revision Date: 12/29/2022**

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**PURPOSE**      The purpose of this policy is to provide guidance for evaluating and issuing transportation supportive services for CalWORKs (CW) recipients who benefit from participation in the Welfare-to-Work (WTW) and Cal-Learn (CL) programs.

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**POLICY**      Regulations require that CW recipients be informed that necessary supportive services, including payments for transportation, are available to every WTW and CL participant in order to:

- Participate in their assigned activity
- Accept or retain employment
- Attend CW WTW required appointments

If necessary supportive services are not available, the participant would have good cause for not participating in their assigned WTW/CL activity. Reasonable and appropriate transportation costs will be paid for every participant to and from their WTW/CL activity. The payment will also include transportation to and from their childcare provider. Children needing transportation may also be evaluated for private transportation. Refer to the "[Transportation for a Child](#)" section in this policy.

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**BOOKMARKS**      [ESTABLISHING TRANSPORTATION NEEDS](#)  
[AUTHORIZING AMOUNTS FOR PAYMENTS](#)  
[PRIVATE VEHICLE](#)  
[ADVANCE PAYMENT REQUEST FOR USE OF PRIVATE VEHICLE](#)  
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**ESTABLISHING TRANSPORTATION NEEDS**

At CW Orientation, Appraisal, and each time a WTW Plan is signed, the WTW Case Manager (CM) will evaluate a participant’s supportive services needs. If a transportation need is identified, the CM will refer the participant to the assigned Employment Eligibility Specialist (EES) for the issuance of supportive services via [Supportive Services Referral & Information F063-41-121](#).

A participant may request transportation verbally or in any form of writing at any time before or during participation in an approved WTW/CL activity. A lack of transportation should never be a barrier to participating in WTW activities.

Written requests may be made on the [WTW Supportive Services Request F063-41-124](#) form provided by the CM at the client’s request.

The participant must be informed that any changes in transportation needs are to be reported to the EES or CM at least ten (10) calendar days before an anticipated change, except in emergency situations.

**AUTHORIZING AMOUNTS FOR PAYMENTS**

The EES is responsible for evaluating and processing transportation requests and authorizing the WTW/CL participant payment.

The EES will evaluate mileage and reimburse if no other source of funding for mileage reimbursement is available from an employer or community program.

The county will pay the **least costly** form of public transportation that will not prevent a participant from participating in their assigned WTW/CL activities.

All mileage requests are subject to a review process. This includes mileage requests to and from assigned WTW/CL activities, including to and from a childcare provider and employment.

The following are approval limits for authorizing payments:

Payment Authorization	
Classification	Amount
Employment Eligibility Specialist	Request between \$0 - \$500
Supervisor	Request between \$501 - \$1,499
Administrative Manager I	Request between \$1,500 - \$2,499

Refer to Policy and Quality Assurance (PQA) for approval on any request of \$2,500 and above.

**Note:** When questionable circumstances arise, staff are to explore travel reimbursement requests via the chain of command.

**PRIVATE VEHICLE**

**Mileage reimbursement is available to participants who choose to drive their own car or who borrow a vehicle to get to and from their WTW/CL activity.**

Mileage reimbursement will be determined based on the **two (2)-hour rule** as follows:

- When public transportation via bus is available and reasonable (under two [2] hours round-trip), participants will be reimbursed at the rate which is the least costly to the county:
  - The flat monthly bus pass rate **or**
  - The per-mile IRS rate
- When public transportation via bus is not available or is unreasonable (over two [2] hours round-trip), participants will be reimbursed at the per-mile IRS rate

Refer to attachment 1 - [CalWORKs Transportation Rates](#) for current transportation related rates.

Travel miles to and from the WTW activity/primary place of business are reimbursable. Mileage expenses incurred while the participant conducts their business to multiple job sites is not covered under mileage reimbursement. For example, a participant working as a delivery driver would be paid for mileage to the place of employment but not for deliveries made during the work shift.

**Note:** Transportation to and from the childcare provider is also covered. Refer to attachment 2 – [Establishing Transportation Payment Rate](#) for more information.

Participants who choose to use their own or borrowed vehicle when public transportation is available are eligible for one (1) of two (2) reimbursement options based on which is the **least costly** to the county:

1. When the round-trip travel time to the participant's WTW/CL activity **does not exceed a total of two (2)-hours** on public transportation, the EES will issue as follows:
  - If the cost of the monthly bus pass is **less** than the per-mile rate for mileage reimbursement:
    - Issue flat monthly bus pass rate
  - If the cost of the monthly bus pass is **more** than the per-mile rate for mileage reimbursement:
    - Issue requested mileage reimbursement
2. When the round-trip travel time to the participant's WTW/CL activity **exceeds a total of two (2)-hours** on public transportation:
  - Issue requested mileage reimbursement

The round-trip travel time includes time to travel between the participant's home and the location of the assigned WTW activity. The round-trip travel time **does not** include the time necessary to take family members to school or childcare.

**Note:** Mileage reimbursement payments are intended to cover the car owner's routine maintenance costs, such as per-mile cost of gas, oil changes, batteries, tires, car insurance, license, and registration fees.

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**ADVANCE  
PAYMENT  
REQUEST FOR  
USE OF  
PRIVATE  
VEHICLE**

The participant is to be informed that transportation costs are normally paid in arrears. However, if requested, the participant may receive an advance payment for their transportation needs.

The EES will take the following steps:

- Follow the criteria stated in the [“Mileage Reimbursement Payments”](#) section in this policy
- Advise the participant that in order to continue receiving advance mileage payments, the EES must receive proof of costs for the month in which the payment was issued no later than the 10th day of the following month
- Review the completed and signed [Mileage Claim for Transportation F063-41-12](#) to verify mileage incurred while participating in the WTW/CL assignment is accurate
- Issue the payment within seven (7) calendar days after the payment has been approved

**Subsequent Advance Payment**

Ensure that the participant who is requesting a subsequent advance payment has submitted the completed and signed [Mileage Claim for Transportation F063-41-12](#) form with accurate information for the previous month prior to issuing a subsequent advance payment.

**Unused Portion**

An unused portion of an advance payment is that amount of an advance payment received that is not supported by verification of costs. When an advance payment is not supported by proof of cost, the EES will calculate the amount of advance payment not supported by proof and refer to [Policy 319 - Unused Advance Payment](#) for guidance.

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**MILEAGE  
REIMBURSEMENT  
PAYMENTS**

The WTW/CL participant is to complete and sign the [Mileage Claim for Transportation F063-41-12](#) when requesting reimbursement for mileage, parking fees, and carpool costs incurred for travel to and from their activity and childcare provider.

**Verifications**

Participants are required to follow California Vehicle Motor Code regulations to legally operate a vehicle and comply with the law; however, participants are **not** required to provide proof of a valid California Driver’s License, Vehicle Registration, and Insurance in order to receive a mileage reimbursement payment for the assigned WTW/CL activities.

**Criteria**

Mileage reimbursement or advances to WTW/CL participants will be calculated and paid if the requirements below are met:

- The participant must be in an approved WTW/CL activity

- Transportation supportive services must be necessary for the participant to participate in the program activity to which they are assigned or to search for, accept, or retain employment

Refer to attachment 2 - [Establishing Transportation Payment Rate](#) for instructions on how to determine the least costly form of public transportation that will not prevent a recipient from participating in WTW/CL activities. Refer to attachment 1 - [CalWORKs Transportation Rates](#) for current transportation related rates.

The EES will reimburse the participant as follows:

### **Mileage**

Participants who drive their own car or borrow a vehicle to get to and from their WTW/CL activity will be evaluated for, and authorized mileage reimbursement based on the **two (2)-hour rule**. Refer to the “Private Vehicle” policy section above or attachment 2 - [Establishing Transportation Payment Rate](#) for more information regarding the two (2)-hour rule.

### **Carpool**

When a participant shares a ride to WTW/CL activities with the owner of the vehicle, mileage will be reimbursed at the current rate or the amount charged to the participant by the owner of the vehicle, whichever is **least costly**. The participant must provide a statement or receipt from the owner before payment is made. The reimbursement payment will be made to the participant who will be responsible for paying the participant’s costs.

### **Parking**

Parking costs incurred by the participant while using their car when participating in their assigned activity or program are to be reimbursed at actual cost. Receipts for parking must be submitted, except in cases where parking meters are used.

### **Parking Permit**

Monthly parking passes requested by a WTW/CL participant will be paid under Transportation. For college/university parking permits, refer to Worker Tool 34 College Fees Allowed as Supportive Services.

For procedural guidance, refer to [Supportive Services – Transportation Request Processing Guide](#).

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## **AUTHORIZING MILEAGE PAYMENTS**

The EES will determine the correct payment using instructions in attachment 2 - [Establishing Transportation Payment Rate](#).

The EES will refer to the [Supportive Services – Transportation Request Processing Guide](#) to issue mileage reimbursement.

The EES will process mileage reimbursement payments within 20 calendar days after receipt of the [Mileage Claim for Transportation F063-41-12](#) form.

Prior to issuance, the EES will:

1. Inform participants that they are eligible for mileage reimbursement calculated to and from their home address and the address of their approved WTW/CL activity, and childcare provider
2. Review the [Mileage Claim for Transportation F063-41-12](#) for completeness, accuracy, and client's signature
3. Verify that the initial mileage claimed for a new activity and/or an additional activity from the participant's home address to the address of the approved WTW activity is "reasonable and appropriate"
  - Reasonable and appropriate will be determined by utilizing a web-based mileage calculator, such as [MapQuest](#) or [Google Maps](#)
  - The determination of "reasonable and appropriate", including if the mileage to and from the activity was based on a web-based mileage calculator, should be included in narration
  - An imaged copy of the mileage calculation from the web-based mileage calculator is not required if narrated
4. Verify activity attendance
  - Mileage is only paid for days in which the participant attended the approved WTW/CL activity

When the amount of mileage reimbursement is determined to be less than what the participant reported on a mileage claim form, the EES will approve the lesser amount and issue [NA 825 - NOA WTW/CL Transportation Approved for Lesser Amount](#).

### **Check/Warrant**

Participants may select to receive Transportation payments via EBT card issuance or warrant issuance.

A two-parent household case will require a check/warrant issuance when the WTW participant does not have access to the household EBT card.

Example:

EBT card is assigned to Parent 1; Parent 2 is meeting the WTW participation hours for the household. Parent 2 is requesting mileage reimbursement. In this scenario the WTW Participant does not have access to the EBT card and, therefore, a request for a check for mileage reimbursement is made.

EES' are to follow the established procedures for office issuance of supportive services payments if the participant requests to pick up a check/warrant at the regional office.

If a participant reports that a mileage reimbursement check has been lost, stolen, or has not arrived in the mail, the EES is to refer to [CW Procedure 318 – Replacement of Welfare -To - Work Supportive Services Checks](#).

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**PUBLIC  
TRANSPORTATI  
ON**

Public transportation is available countywide via bus/Orange County Transit Authority (OCTA). Participants should be encouraged to use public transportation.

When assigning public transportation supportive services, the WTW CM or the EES should assist the participant with information necessary to locate appropriate bus routes. The EES is to explain the use of bus passes in the WTW program.

Alternative transportation requests such as the use of a Taxi, Uber, Lyft, Train/Metrolink or any other source of non-traditional public transportation requests, are to be escalated to PQA via the chain of command for further evaluation. These methods of transportation are generally not the least costly and will be evaluated on a case-by-case basis.

**Note:** Requests with a combination of transportation methods may be allowed, if necessary, to ensure that transportation is not a barrier to participation.

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**PUBLIC  
TRANSPORTATI  
ON PAYMENTS**

The EES is to evaluate transportation based on the participant's needs and case history, to determine whether a bus pass is to be mailed or picked up by the participant at the regional office.

- The EES will utilize the SSA Accounting staff for in-office issuance of bus passes
- Refer to the CW Resource Guide [Transportation Services](#)
- Refer to attachment 1 - [CalWORKs Transportation Rates](#), for the current approved transportation related rates

Payments are to be issued using one of the following types of OCTA Bus Fares:

**Regular Day Bus Pass**

To be issued when it is determined that a daily pass for connecting bus travel is needed to get to and from an assigned activity. The pass is valid the day it is activated until 3 a.m. the following morning.

**Regular 30-day Bus Pass**

To be issued when it is determined that a regular 30-day bus pass is the least costly form of public transportation for the participant to get to and from an assigned activity.

- A Regular 30-day bus pass is valid for 30 days beginning with the date of activation
- Up to three children, five years old and under, may ride free with a fare-paying adult

**Youth 30-Day Bus Pass**

To be issued to youth 18 and under. A Youth 30-day bus pass is valid for 30 days beginning with the date of activation.

Authorized transportation for CL participants 18 and younger and school age children of a WTW participant who has demonstrated that taking their child(ren) to school on their way to their WTW activity would prevent them from arriving on time and participating as scheduled.

The EES is to follow guidelines outlined in the CW Resource Guide – [Transportation Services](#) to process requests for transportation payments.

### **The Youth Ride Free Program**

Effective March 2022, OCTA will provide Youth Ride Free passes through:

- School
  - Passes are available directly from most Orange County K-12 schools
- Online request form
  - OCTA Youth Ride Free Parental Request Form
- Walk-ins at the OCTA Store
  - 600 S. Main St, Orange, CA

A parent request form is needed to receive the pass. As of this policy revision, the pass is valid through September 2023, after which time a new pass will be provided. Refer to the [OCTA](#) website for further details.

Staff are to inform CalWORKs recipients of the availability of the pass and encourage families to obtain a youth pass via the [Youth Ride Free Online Parental Request Form](#). Once completed, OCTA will provide a pass by mail.

**Note:** The Youth Ride Free pass availability should not be a barrier for WTW participants. A Youth 30-Day Bus Pass may be issued to avoid potential barriers.

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### **TRANSPORTATION FOR A CHILD**

A Youth 30-Day Bus Pass for school age riders 18 and younger, is available when it will assist a WTW/CL parent to participate in the program activity to which they are assigned or to accept or retain employment.

When a school age child is too young to use public transportation to get to and from school and to the childcare provider, CW can pay a childcare provider or a transportation provider, such as a shuttle service, if the service is necessary and the cost is within a reasonable market rate.

Some childcare providers include transportation to and from school and the childcare location as part of their childcare rate/plan. In this situation, transportation is fully covered by the childcare payment and subject to the Regional Market Rate (RMR). **If the cost exceeds the RMR, the parent would pay the difference.**

### **Child Transportation Services Provided by Childcare Provider**

The EES supervisor must approve the transportation request for a child. Child transportation services (shuttle service), which are **not included** as part of the



childcare service, but provided as a separate service through the childcare provider's business, **may be allowable if:**

- The cost is within a reasonable market rate charged to the public
- The cost is not added when determining the childcare regional market rate limit
- The additional charge is added on the [CW Child Care Plan F063-41-18](#)
- The childcare provider does not charge for childcare during the time the child is being transported

### **Child Transportation Services Provided by a Separate Child Shuttle Service Provider**

If a separate arrangement exists between a child transportation provider (shuttle service) and the WTW/CL participant, the following must be provided:

- A copy of the agreement made between the child transportation provider and the participant to include:
  - The name of child(ren) receiving the service
  - Destinations (transportation would be to and from the childcare provider and the child's school)
- A W-9 and verification of the transportation provider's Tax Identification Number, which is either an Employee Identification Number (EIN) or a Social Security Number (SSN) for 1099 income reporting purposes prior to approval of services
- A statement from the childcare provider that they do not have a means to bring/collect child from school

Payment amounts to providers who transport children to and from school and/or childcare are allowed based on their rate charged to the general public.

- This is based on transportation "each way" and not "round-trip"
- Transportation surcharges are an **unallowable** expense

Refer to attachment 1 - [CalWORKs Transportation Rates](#), for current transportation related rates.

### **Approved Transportation for a Child**

Once transportation for the child is approved, the EES will:

- Ensure the participant was issued NA 820 – NOA Transportation Approval for WTW/Cal Learn informing that the request was approved and a check for the transportation cost will be issued to the transportation provider after a mileage request form is submitted for payment
  - Notify the provider by telephone of the approval and explain to the childcare provider how this payment will be processed
  - Image the receipt/request for payment in the participant's case file when it is received
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## **BUS PASS HAS NOT ARRIVED IN THE MAIL**

If the WTW/CL participant notifies the EES that a bus pass has not arrived in the mail, the worker is to:

- Review the appropriate system screens to ensure that the bus pass was processed and mailed through SSA Accounting
- Check the date the bus pass was mailed to ensure there has been adequate time for mail delivery
- Verify case mailing address with the participant to ensure the address is still correct
- Explain the [Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Check \(F063-15-90\)](#) form to the participant and have them sign it via DocuSign, MyBCW, email, or in-person
  - Write “regular day pass” or “youth 30-day pass” or “regular 30-day pass” in the upper right-hand corner of the form
  - Write the pass serial number from the case record on the form
- Instruct the participant that if the original bus pass is received/found it must be returned immediately
- Advise the participant to wait and sign for the bus pass, as the replacement for a lost or stolen pass will not be mailed out
  - If the participant is unable to come to the office, explore alternative means to release the bus pass replacement to the participant
- Provide SSA Accounting staff with the signed affidavit and request for the bus pass replacement
- Narrate all actions taken to document that the bus pass was lost and not delayed in the mail due to a wrong address, etc.

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## **BUS PASS RETURNED**

If a WTW/CL participant returns a bus pass that has **not been used**, the EES will:

- Return the bus pass to SSA Accounting and obtain a receipt
- Image the receipt in the case file and give the original copy of the receipt to the participant
- Narrate the circumstances of the bus pass return

If a WTW/CL participant returns a bus pass that has **been used**, it will remain recorded as issued to the participant.

The EES will:

- Document the return of the bus pass in the participant’s case file
- Return the actual bus pass to SSA Accounting

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## **EDUCATIONAL ACTIVITIES**

CalWORKs recipients who are in an educational activity (i.e. Pre-SIP, SIP, Vocational Training, and Adult Basic Education) are eligible for advance payment or reimbursement of Transportation, prior to signing a WTW plan and obtaining the Referral For Education/Training ([41-05](#)) when it meets all of the following conditions:

- The expense is incurred after the beginning date of aid
- The expense is necessary for participation during the academic period or term (semester or quarter) which the participant was approved
- The expense is an un-reimbursed out-of-pocket cost to the participant

- Verification is received that indicates the recipient is registered in an educational activity

Transportation expenses that are incurred **prior to** the beginning date of aid, even if the expenses were actually paid for **after** the beginning date of aid, cannot be reimbursed.

For other supportive services, refer to policies: [301 - Child Care](#) and [315 - Ancillary Supportive Services](#) as needed. Refer to Supportive Services List & Categories Worker Tool (WT 2) for supportive services available to WTW participants.

**DOMESTIC ABUSE SERVICE UNIT**

CW recipients in the Domestic Abuse Services Unit (DASU) are eligible to supportive services for the hours of participation regardless of the actual hours because of the range of activities they may be involved in.

Mileage reimbursements may be evaluated on approved WTW activities and other approved activities related to DASU. It must be identified and documented on the Senior Social Worker (SSW) approved DASU case plan.

The DASU client and the Specialized Case Manager (SCM) will discuss these activities, determine what supportive services will be required and make a referral to the EES.

Bus passes may be provided for these clients' children as they might be at additional risk. However, children 6 (six) and under ride free on OCTA with a paying adult.

Contact PQA via the chain of command regarding specific DASU related transportation case issues for evaluation on a case-by-case basis.

Refer to Policy [402 - Domestic Abuse Services](#) for additional guidance.

**REQUIRED NOTICES**

The EES must issue a NOA to the participant when transportation services are approved, denied, increased, decreased, terminated, or changed.

Refer to [WT 9 - Supportive Services NOAs, Forms and Other Correspondence](#).

**REFERENCES**

- [Policy 301 - Child Care](#)
- [Policy 315 - Ancillary Supportive Services](#)
- [Policy 318 - Replacement of CalWORKs Supportive Services Warrants \(System Generated Checks\)](#)
- [Policy 319 - Unused Advance Payment](#)
- [Policy 402 - Domestic Abuse Services](#)
- [WT 2 - Supportive Services Categories In CalWIN](#)
- [WT 9 - Supportive Services NOA's, Forms and Other Correspondence](#)
- [Worker Tool 34 College Fees Allowed as Supportive Services](#)
- EAS Manual Sections 42-750, 42-762, and 44-211

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**PROCEDURE**

- [Resource Guide - Transportation Services](#)
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**ATTACHMENTS**

- [Attachment 1 - CalWORKs Transportation Rates](#)
  - [Attachment 2 - Establishing Transportation Payment Rate](#)
  - [Attachment 3 - Transportation Refresher Training Questions and Answers](#)
  - [F063-41-12 Mileage Claim for Transportation](#)
  - [F063-41-18 CW Child Care Plan](#)
  - [F063-41-121 E Supportive Services Referral & Information](#)
  - [F063-41-124 WTW Supportive Services Request](#)
  - [F063-15-90 Affidavit to Obtain Duplicate of Lost, Stolen, or Destroyed Check](#)
  - [NA 825 - NOA WTW/CL Transportation Approved for Lesser Amount](#)
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OCCSSA