

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

**Program/Area:** Welfare-to-Work

**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 (FSS), for clients who have both an open CFS case and an open or pending CalWORKs case. These common clients will be referenced as mutual clients.

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**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.

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**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)** – worker assigned to provide case management and support for the CalWORKs client in their Welfare-to-Work (WTW) case.

**CalWORKs Specialized Case Manager (CM)** – 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)** – worker assigned to an exempt CalWORKs case.

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

**Continuing Employment Eligibility Specialist (CEES)** – worker assigned to provide case management and support in order to determine continued CW, CF, and MC eligibility, as well as supportive services.

**FSS Regional Contact** – 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** – worker assigned to the CFS case.

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**CONFIDENTIALITY** Information and document sharing between CFS and FSS 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 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 acco in OnBase which houses confidential information contained in all client files and has restricted access.

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**MUTUAL CLIENT IDENTIFICATION** Early identification of a mutual client is critical to the coordinated case planning process between CFS and FSS. 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 how mutual clients are identified by CFS and FSS:

CFS

- When a Child Abuse Registry (CAR) report is received and “dispo’ed” 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.

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**COORDINATED CASE PLANNING PROCESS** Mutual clients will have both a CFS case plan and a CalWORKs WTW plan. In order to maximize benefits for the mutual client as well as for the agency, it is essential that the two case plans be developed through a collaborative process between the 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 client(s).

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

CFS

## Unit Clerk/ Data Entry Technician (DET) Responsibilities –

1. Clear parents in Shadow Database
2. Determine CalWORKs assigned worker name and contact information

**Note:** If the CalWORKs assigned worker is unknown, contact the FSS Regional Contact to determine the name of the assigned CalWORKs worker for the mutual client case. (Refer to [FSS Regional Contact](#) list)

3. 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.
4. Add CalWORKs assigned worker name and contact information to the Service Providers listed in CWS/CMS.

## CFS Social Worker Responsibilities –

1. When a mutual client has been identified through the case clearing process, contact the CalWORKs worker via email or telephone to discuss the following:
  - a. Client's participation in WTW if applicable, and identify any services the client is already receiving through CalWORKs.
  - b. Request a copy of the WTW plan from the CalWORKs CM
  - c. Additional services that are needed by the client and make appropriate referrals
  - d. Requirements and/or activities outlined in the CFS case plan to determine if any changes or updates are needed for the client's WTW plan
2. 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.
3. 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.
4. While the CFS case remains open, the CFS Social Worker must contact the CalWORKs CM when any child(ren) are 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.

## **FSS/CalWORKs**

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 –

1. 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:
  - a. Advise the CFS Social Worker that the mutual client is receiving CalWORKs services and required to participate in WTW activities unless otherwise exempt
  - b. Discuss the client's WTW plan in terms of activities and hours of participation required of the client.
  - c. Discuss and review elements of the client's CFS case plan
  - d. Coordinate needed supportive services and make appropriate referrals
  - e. Develop a new WTW plan or modify an existing WTW plan as needed based on the elements of the CFS case plan
  - f. Include "CFS Activities" in the WTW plan
2. If necessary, provide a copy of the client's WTW plan to the CFS Social Worker
3. 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 client's circumstances should be immediately discussed to re-evaluate participation in WTW activities.

CalWORKs Eligibility Technician (ET) Responsibilities –

1. 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:
  - a. Reason for Exemption and expiration date
  - b. Grant amount
  - c. Household composition

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**WTW PLANS,  
GOOD CAUSE,  
EXEMPTIONS,**

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

**NON-  
COMPLIANCE,  
AND SANCTIONS**

Welfare-to-Work Plans

[Welfare-to-Work Plans \(WTW\)](#) 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 in order 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 Services to Family Reunification Parents

The WTW plan will be signed 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 their WTW case plan.**

#### Good Cause/Exemptions/Non-Compliance/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 contact one another to determine if Good Cause exists. If Good Cause is found, the noncompliance process ends and a sanction is not imposed. Refer to [Policy 240 Good Cause/Compliance/Sanction](#) 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 [Welfare-to-Work Exemptions Policy #100-F1](#). Exemptions should be reviewed when changes are reported or when the exemption expires.

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**ATTACHMENTS**     [FSS Regional Contact List](#)  
[Mutual Client vs. Family Reunification Comparison Chart](#)

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**REFERENCES**     [Policy 402 Domestic Abuse](#)  
[Policy 407 Family Stabilization](#)  
[Policy 401 CalWORKs Behavioral Health Services](#)  
[Policy 211 Welfare-to-Work Plans \(WTW2\)](#)  
[Policy 403A CalWORKs Services to Family Reunification Parents](#)  
[Policy 240 Good Cause/Compliance/Sanction](#)  
[Policy 100-F1 Welfare-to-Work Exemptions](#)  
[Mutual Client Processing Guide](#)

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