Update 2010-16: Common Place Handbook
Inter-Office vs. Courtesy Applications

Background
Santa Clara County was using incorrect terminology when referring to courtesy applications, which caused much confusion among district offices, and as a result, incorrect procedures were being followed.

Policy
Information is incorporated into Chapter 53 of the Common Place Handbook clarifying the difference between an Inter-Office Application and a Courtesy Application.

Inter-Office Application
The terminology “courtesy application” is no longer to be used when referring to applications taken locally between district offices. The new terminology for these applications is “Inter-Office Applications.”

When a client applies for assistance in an Intake District Office, and the aid that he/she is requesting is specialized in another District Office, or the office that corresponds to his/her zip code is in another District Office, the District Office where the client is applying must take an Inter-Office application.

A Inter-Office application is defined as an:

- “Application for Cash Aid, Food Stamps, and/or Medi-Cal Assistance” (SAWS 1), and
- “Identification and Intake Record” (SCD 41).

Courtesy Application
A courtesy application is defined as one where the applicant:

- Resides in another county and is applying for him/herself, or
• Is applying for aid on behalf of a relative or friend that resides in another county within the state of California, and it would be an inconvenience for the applicant to apply in the county of the individual’s residence.

Exception:
If the client applies for Medi-Cal only, the initial county must determine Medi-Cal eligibility, issue benefits, then initiate an inter-county transfer (ICT) to the client’s county of residence.

[Refer to “Courtesy Applications,” page 19-23 in the Medi-Cal Handbook]

Example:
Mr. Lopez, a resident of Los Angeles County, is visiting Santa Clara County. He becomes ill and must be hospitalized at the Valley Medical Center (VMC). Mr. Lopez applies for Medi-Cal in Santa Clara County.

Example:
Mrs. Garcia’s sister, who resides in San Diego County, is ill and is in need of public assistance. Mrs. Garcia would like to apply for aid for her sister, but cannot travel to San Diego County to do so.

Note:
The number of courtesy applications received should be minimal, since many programs have waived the requirement for a face-to-face interview.

Reminder:
Courtesy applications DO NOT apply for individuals residing outside of the state of California.

Medi-Cal Courtesy Application
If an applicant requesting a courtesy application is applying for Medi-Cal, the following must occur:

• The Application/Registration process must be initiated by Clerical in CalWIN.

• The Medi-Cal application must be assigned to an EW who will follow normal eligibility procedures. Medi-Cal eligibility must be determined, benefits issued and an ICT initiated to the county where the client/applicant resides.

Implementation
This is not new policy and has always been in effect; however, incorrect terminology was being used to define these applications.
CalWIN

“Inter-Office Application” is added to the Reference Table and must be used for these applications.

Clerical

Office Management Coordinators (OMCs) must review this handbook section and update with their respective staff at their next clerical meeting, but no later than 08/10/10 and ensure that correct policy is being followed.

EW Supervisors

Eligibility Work Supervisors must ensure that this handbook section and update are reviewed with their respective units at their next unit meeting but no later than 08/10/10.

Kudos

Many thanks to Sean Romeo, Social Services Program Manager (SSPM) of the Assistance Application Center (AAC), for recommending the new terminology of “inter-office applications.”

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