Update 2013-18: Common Place Handbook
CWES Task Management Tool (TMT) Requests

Background
The Central Client Services (CCS) model was implemented for intake on April 25, 2011. Continuing CCS went live on August 29, 2011.

All CWES related requests should be viewed as high priority because CWES actions are contingent upon entries in Data Collection. A priority system has been developed with two levels to address CWES requests. Depending on the priority level, CWES staff will contact CCS Intake or Continuing offices by phone or create a Task Management Tool (TMT) request using the CCS Request Form for case action. Some CCS requests will include attachments that provide detailed instructions for the required actions.

Policy
The following are current procedures already being followed:

[Refer to "CWES Requests," page 59-36]

Priority 1 or 2 Requests
Employment Counselors (ECs) are to create TMT requests or contact Eligibility Worker (EW) Officer of the Day (OD)/assigned EW for priority 1 and 2 requests that are NOT initiated by Employment Program Supervisor.
At CBS

The CCS Continuing Benefits Services (CBS) Office utilizes a Unit Task Base Model (UTBM). CWES follows the following procedures for Priority One requests:

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is an opened/assigned Task Management Tool (TMT) request,</td>
<td>Sends an email to the assigned EW and cc’s the EW III, EW Supervisor (EWS) and Employment Program Supervisor (EPS) with the required actions.</td>
</tr>
<tr>
<td>There is no open/assigned TMT,</td>
<td>Checks CalWIN for the unit case assignment, and sends an email to the respective Unit’s OD and cc’s the EW III, EWS and EPS with the required actions.</td>
</tr>
<tr>
<td>The cases are in the following control numbers (CCNA, CCNZ, CCFM and CCNF),</td>
<td>Calls extension 4099 per existing procedures.</td>
</tr>
</tbody>
</table>

The unit’s OD schedule will be posted monthly on the Shared Calendar, “CBS OD Calendar” via Outlook. The calendar indicates the unit’s OD assignment, time schedule and phone number.

CWES staff have been given view access to CBS OD calendar to be able to search for the respective unit’s OD for CWES Requests without an open or assigned TMT.

At Intake

CCS Intake staff now processes applications from beginning to completion. CWES staff need to check TMT prior to creating a new TMT Form, and are to follow the procedures below:

<table>
<thead>
<tr>
<th>If the TMT...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is open and assigned to an Intake EW,</td>
<td>E-mails the EW directly for Priority 1 or 2 related requests and cc’s EPS.</td>
</tr>
<tr>
<td>Is not open and assigned to an Intake EW,</td>
<td>Follows existing procedures:</td>
</tr>
<tr>
<td></td>
<td>- For Priority 2, completes the TMT Form Fill.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> TMTs will be given priority and assigned as soon as possible. The requests are pulled from the queue and given priority.</td>
</tr>
<tr>
<td></td>
<td>- For Priority 1, calls the designated Intake EWS for case action.</td>
</tr>
<tr>
<td>Is open and unassigned,</td>
<td>Call extension 4670.</td>
</tr>
</tbody>
</table>
Priority Level 1
The following are considered as Priority Level 1:

- Lifting of Sanctions (TMT must be initiated by EPS or Lead)
- Troubleshooting of Sanctions (e.g., duplicate sanctions) (TMT must be initiated by EPS or Lead)
- Status Change (i.e., address, telephone numbers)
- Vendor Payment Identification (i.e., Special Indicator, Case Comments)
- Informational Phone Calls (e.g., QR7/SAR 7, discontinued or inactive status)
- Temporary case payee for Cal-Learn teens who graduate

**Note:** Run EDBC per CWES request. On occasion, EC may need EW to take this action when bonuses are issues.

- Validation of Sanctions (e.g., child support and drug felons)

**Note:** If child support or drug felon sanction is invalid, phone support will then need to create a TMT to resolve the sanction clean up.

When contacting EW OD/assigned EW, ECs or SWs staff must write their Name, Worker Number, telephone number, and a brief description of the issue in the CalWIN **Maintain Case Comments** window. This will assist the EW assigned to the TMT request in identifying the EC or SW to contact before taking action on the CalWORKs case. Once known, ECs may also send the existing email templates available in the DEBS Forms Library to the EW assigned to the TMT request. Once the request or task is completed, EWs must contact the appropriate EC or SW.

Priority Level 2
Priority Level 2 are requests which do not require same-day processing.
The following are considered as Priority Level 2:

- Implementation of Time Limited Exemptions (TMT must be initiated by the Exemption Unit)
- Implementation of Sanctions (TMT must be initiated by EPS or Lead)
- Household member changes impacting the WTW program and WPR
- New employment/employment ending
- Implementation of Other WTW Exemptions:
  - Medical (TMT must be initiated by EPS or Lead)
• Caring for an ill & incapacitated person living in the home (TMT must be initiated by EPS or Lead)
• Newborn
• Pregnancy
• Domestic Abuse (TMT must be initiated by EPS or Lead)
• ES Registrations
  • Overriding results to register one parent in a two-parent household
  • Cal-Learn registration issues
  • Running/saving exemptions
  • Sanction-Related Requests (TMT must be initiated by EPS or Lead)
• Time on Aid (TOA)
• Assembly Bill (AB) 429 - Family Reunification Cases
• Teen Parents/Truant Teens
• RCA-ES Related Issues (TMT must be initiated by EPS or Lead)
• Clean-up of Exemptions

Note: For “Other exemptions or clean-up of exemptions” which require same-day processing, CWES staff will call the Information Supervisor of the Day who will, in turn, create a TMT ticket for the request.

**CCS Request Form**

CCS Request Form is used when ECs or SWs have a request that does not require same-day processing. EC/SW staff will generate a TMT Request by completing the CCS Request Form. The TMT ticket will be generated and assigned to an EW the next day.

ECs must submit their CWES action requests, along with the required documentation or attachments, to their leads or supervisors to generate TMT requests that must be initiated by EPS/Leads.

The ECs or SWs must write their name, worker number, telephone number, TMT request number, and a description of the issue in the CalWIN **Maintain Case Comments** window. This will assist the EW assigned to the TMT request in identifying the EC or SW to contact before taking action on the CalWORKs case. EWs must also contact the appropriate EC or SW once the request or task is completed.
The designated CWES/SW staff must attach the existing email templates available in the DEBS forms Library and other required documents to the TMT Request.

[Refer to CCS 411 Bulletin - TMT Request Form for more information.]

### Cases at BSC

The following steps are to be followed when addressing CWES requests for cases located at BSC:

<table>
<thead>
<tr>
<th>Step</th>
<th>Who</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1 | Designated CWES Staff or EPS | • Identifies issue that requires correction, such as Time on Aid related actions.  
• Calls CBS Information Supervisor to discuss CWES request.  
• After discussion with Informational Supervisor, creates the TMT ticket. |
| 2 | CBS Information Supervisor | • Immediately transfers the case from BSC to CBS.  
• After transferring case, notifies BSC OMC via email that case is transferred for processing CWES TMT Request. |
| 3 | EW Support | • Within 3 working days, processes CWES TMT request.  
• Notifies his/her supervisor and the Informational Supervisor that the task is complete. |
| 4 | CBS Information Supervisor | • Reviews case to ensure task is completed and transfers back to BSC caseload.  
• Notifies BSC OMC via email that CWES TMT request is completed and that case is transferred back to BSC. |

### Confidential Cases

The following steps are to be followed when CWES identifies Confidential Cases:

<table>
<thead>
<tr>
<th>If the Case...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| Is at AAC,     | • CWES Supervisor/Lead calls Phone Support to have Special Indicator added to case.  
• EW Phone Support updates the **Collect Case Special Indicator** window in CalWIN by selecting, “Confidential - SSA Employee.” |
| Is at CBS,     | • EC Lead/Supervisor emails OMC (Richard Aballe and cc’s Marie Mulipola to inform of identified confidential case.  
• OMC updates the **Collect Case Special Indicator** window in CalWIN by selecting, “Confidential-SSA Employee.”  
• OMC transfers case to confidential caseload number, CCNZ. |
**Note**: Instructions for creating TMT tickets for confidential cases are located within the Employment Services S-Drive TMT Training folder.

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**Escalation Process**

The following escalation process is to be adhered to when there are delays in accessing Phone Support or in resolving pending CWES TMT Requests for CCS Intake and CCS Continuing:

**Phone Support**

When phone waiting time exceeds 10 or 15 minutes, the following process is followed:

<table>
<thead>
<tr>
<th>If Phone Delay is At...</th>
<th>Due to...</th>
<th>Then the EC...</th>
</tr>
</thead>
</table>
| CCS Continuing,         | Wait time exceeding 10 minutes, | Calls the following support staff to have the call forwarded to a live Phone Support Agent to process the request:  
  - Information Supervisor’s Cell Phone (408) 315-4769, or  
  - Administrative Assistant at (408) 758-4145, and  
  - Follows up with email, as appropriate. |
| CCS Intake,             | Wait time exceeding 15 minutes, | Calls the CalWORKs Liaison at the following numbers to have the call forwarded to a live Phone Support Agent to process the request:  
  - 758-3840, or  
  - 758-3843, and  
  - Follow up with email, as appropriate. |

**TMT Requests**

When the TMT ticket has been pending for more than 3 working days, the following process is followed:

<table>
<thead>
<tr>
<th>If the TMT Delay is at...</th>
<th>And the TMT Ticket...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| CCS Continuing            | Is assigned to an EW,  | • EC/SW staff (TMT ticket creator) follows up by emailing assigned EW and cc’s EWS/EPS.  
  **Note**: Tickets are auto-assigned at Continuing. |
|                           |                       | • EWS follows up with EW.  
  • EW confirms with EC/SW staff via email that action is complete, and if further action is necessary, calls EC if no response or action taken, EPS to contact EWS to resolve TMT. |
Note: The CWES TMT request should not be closed until the TMT task has been resolved timely and correctly.

Clerical Staff

When a Benefits case is transferred to another office and there is an open CWES TMT Ticket, the CWES ticket must also be transferred as follows:

<table>
<thead>
<tr>
<th>When transferring to...</th>
<th>Transfer as follows...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Another CCS TMT Office,</td>
<td>Changes Category Type in TMT.</td>
</tr>
<tr>
<td>BSC,</td>
<td>TMT ticket is closed but an email is sent to “BSC Floor” Outlook email box that includes the information in the CWES TMT Ticket request.</td>
</tr>
</tbody>
</table>

Closed TMT Tickets

When the TMT ticket is closed but actions have not been taken, or the action is taken incorrectly, the following process is followed:

- EC/SW staff, who created the ticket, sends an email to the EPS, to request that the TMT ticket be re-opened. EPS is to forward the email to EWS.
- EW Supervisor follows up with the EW.
- EW confirms with EC/SW and copies EWS/EPS via email that action is complete, and if further action is necessary, calls the EC/SW.
DEBS Caseload ID Locator

Refer to the link below to access the CCS Caseload ID Locator spreadsheet:

http://intranet.ssa.co.santa-clara.ca.us/department/documents/debs_caseload_id_structure.xls

Supervisors

Supervisors must review the information in this update with their staff at their next unit meeting or no later than November 12, 2013.

DENISE BOLAND, DIRECTOR,
Department of Employment and Benefit Services

Contact Person(s): Maria Torres, Program Coordinator, (408) 755-7540.