11. Family Services Program

11.1 Background

Santa Clara County offers a Family Services (FS) Program that includes services such as mental health, substance abuse and domestic violence counseling and access to Social Work staff, as well as housing related services.

Assembly Bill (AB) 74 provides strategies designed to increase work participation for Welfare to Work (WTW) participants. Family Stabilization is one such strategy that includes intensive case management through Family Services that is designed to enhance and assist with participation, prior to, or concurrent with WTW activities.

Family Services includes the Family Stabilization Housing Assistance Program and the CalWORKs Housing Support Program (CHSP) as authorized through Senate Bill (SB) 855.

11.2 Family Services Program

Family Services (FS) is introduced to clients at Orientation, Appraisal, in between activities, during WTW participation, exemption reviews and as part of the non-compliance process. It is offered as a service to CalWORKs Employment Services (CWES) clients and/or an eligible member of the Assistance Unit (AU), including DFCS Common Case (Family Maintenance and Family Reunification) clients. The purpose of FS is to help the client stabilize any family situation, issue, problem or barrier to employment that is adversely affecting the client’s ability to participate in WTW.

11.2.1 Family Services Policy

Family Services is a multi-disciplinary approach to WTW services, through intensive case management strategies designed to ensure a basic level of stability within a family. The following applies to Family Services (FS):

- Participation is voluntary.
Family Services Program

- Requires completion of “Family Services Program Request & Application” (SCD 2417).

- Requires the development of a “Family Service Plan” (SCD 2392).

- May be provided at any point in the WTW flow process as long as the family contains an eligible adult with time remaining on his or her WTW 24-Month Time Clock.

- Participation is not subject to the WTW minimum weekly hourly requirement as long as the client is complying with the FS plan.

- Appropriate support services are provided.

- Frequent and on-going contact ranging from daily to weekly, depending on client’s situation.

- Stops the WTW 24-Month Time Clock for up to 6 cumulative months, if meets an existing Good Cause Criteria.

**Note:**

The clock can be stopped by selecting “WTW Good Cause” status in the **Maintain Activity Status** window in CalWIN.

- Maximum length of the plan is six months as a stand-alone plan or as an integrated plan. Extensions will be considered on a case by case basis; however, under a FS Plan, the WTW 24-Month Time Clock can be stopped for 6 cumulative months.

- Failure to comply and complete FS plan without good cause results in termination of FS services; however, the termination is not subject to the non-compliance process. Instead, the participant is transitioned to a WTW Plan.

### 11.2.2 Eligibility Criteria

With the exception of the CalWORKs Housing Support Program (CHSP) criteria, Family Services participants must meet one of the following eligibility criteria:

- Be an active CWES registrant,

- Be in Good Cause Status,

- Exempt,
Family Services Program

- Agree to cure WTW Sanction and sign curing sanction plan, OR
- Be an active CWES registrant’s family member in the Assistance Unit, AND
- Have time remaining on the WTW 24-Month Time Clock.

11.2.3 **Types of Family Services**

Services through Family Services include, but are not limited to the following:

- Mental Health Counseling
- Substance Abuse Counseling
- Individual/Family Counseling
- Domestic Violence Counseling
- CalWORKs Social Work Services
- At-Risk Youth and other Child Services
- Family Stabilization Housing Assistance
- CalWORKs Housing Support Program (CHSP)
- Parenting Classes/Workshops
- Stress Management
- Public Health Assistance
- SSI Application/Advocacy
- Emergency Needs (food, clothing, shelter)
- Legal Assistance/Counseling
- School Attendance/Truancy (young children and teens)
- Financial Literacy
Note:
For additional information and eligibility criteria on At-Risk Youth Services, Family Stabilization Housing Assistance and CalWORKs Housing Support Program, refer to the following Handbook Sections:
[F"FS Youth Services" on page 11-10;
“Family Stabilization Housing Assistance” on page 11-24; and
“CalWORKs Housing Support Program” on page 11-32.]

11.2.4 Application

The client must complete the “Family Services Program Request & Application” (SCD 2417) for all FS related requests. The application identifies the crises or situations client needs assistance to resolve, including housing related issues. The SCD 2417 is used for both the Family Stabilization Housing Assistance and CalWORKs Housing Support Program based on housing need.

Supporting documents such as rental agreements, W-9, eviction notices, etc. need to be attached at the point of initial referral.

11.3 Family Services (Multi-Disciplinary Team) Unit

The Family Services Unit is a multi-disciplinary team specializing in Family Services (FS) that is comprised of Employment Counselors (ECs), CalWORKs Health Alliance, a Domestic Violence Advocate, Social Workers, including a CWES Supervisor; and clerical support. The FS Team identifies, implements, case manages and monitors all FS Plans by providing a multi-disciplinary approach to intensive case management to assist families with barrier removal services and addressing crises situations, which may include case conferences with the client. These services are designed to enhance and assist with participation, prior to, or concurrent with WTW activities.

The FS Team also assists in promoting services at orientations, staff meetings; with the Adult Education Coalition and Community College Consortium meetings and/or at the Employment Connection Center (ECC).

The FS Unit provides services county-wide and coordinates services with North and South County clients. The unit is stationed at the 1879 Senter Road CWES Office. Additional CalWORKs Health Alliance staff are outstationed at the North and South County CWES offices.
11.3.1 FS EC Specialist

The FS EC Specialists are responsible to complete and monitor all FS Plans. They are also responsible to:

• Arrange appropriate supportive services and resources.

• Provide frequent and ongoing client contact.

• Coordinate with multi-disciplinary team for scheduling weekly case conferences for clients as needed.
  Note: Any multi-disciplinary team member may initiate the case conference.

• To participate in Employment and Housing Focus Team supporting the client in the CalWORKs Housing Support Program. [Refer to “Employment and Housing Focus Team,” page 11-34] for additional information.

• Stop the WTW 24-Month Time Clock in the CalWIN system when the client meets the criteria for Good Cause:

  • When the client is assigned to an activity, use the “WTW Good Cause” activity status from the Maintain WTW Activity Status window, OR
  • When the good cause period is more than 30 days and the client is not assigned to an activity, use the [Registration] tab in the Maintain Employment Participation window with Deferred/Good Cause Registration status.

• Request case transfer from the assigned EC upon development of a FS Plan with on-going FS services, or as needed.

• Develop WTW Plan (WTWPLAN-CMPLTDFS or WTWPLAN-FAILEDFS) and transfer case to case management.

11.3.2 Employment Connection Center EC

The Employment Connection Center (ECC) EC provides intensive and expedited employment related services to FS participants, including participating in the Employment and Housing Focus Team for CalWORKs Housing Support Program. [Refer to “Employment and Housing Focus Team,” page 11-34] for additional information.
11.3.3 Social Work Services

Social Workers provide social work related services to identify family needs and services to support the FS Plan. Social Workers will continue to provide services to clients who do not qualify for a FS Plan or who choose not to sign a FS Plan. CalWORKs Social Workers are responsible to:

- Complete the “CalWORKs Referral Results” (SCD 29) form when addressing school attendance problems, truancy, or other social work service.

- Complete the “CalWORKs Domestic Abuse Participation Status” (SCD 1554) and/or “CalWORKs Domestic Abuse Service Plan” (SCD 1555) for Domestic Violence related services.

- Forward the SCD 29, SCD 1554 and/or SCD 1555 to the FS EC Specialist when client agrees to have services and activities integrated as part of the FS Plan.

- Provide assistance for any other resources for short term emergency situations.

- Per current procedures, continue to:
  - Receive referrals from Eligibility Workers.
  - Assist with the filing of Social Security Income (SSI) application/advocacy.
  - Provide community referrals for resources such as, but not limited to, food, clothing and/or legal assistance.

11.3.4 Next Door

The Domestic Violence Advocate from Next Door Solutions to Domestic Violence (Next Door) is responsible to develop plans in the area of Domestic Violence (DV) counseling services and advocacy. When the client agrees to incorporate services and activities in the FS Plan, the “Domestic Abuse Service Plan” (SCD 1555) and/or the “CalWORKs Domestic Abuse Participation Status” (SCD 1554) is forwarded to the FS EC Specialist to incorporate into the FS Plan.

Clients who need DV services who do not qualify for FS or who chose not to enroll in a FS Plan, shall be referred and scheduled to non-FS DV activities. [Refer to “Domestic Abuse,” page 30-1 for existing procedures.]
11.3.5 Health Alliance

Health Alliance provides behavior health related services, needs assessments, and services to support the Family Service Plan. The CalWORKs Health Alliance is responsible to:

- Provide on-site short-term solution-based therapy/counseling for clients who drop-in or call-in for short-term mental health, behavioral and/or stress management issues.

- Provide long-term off-site therapy/counseling for clients who require services longer than 5 visits.

- Complete Part C of the “CalWORKs Community Health Alliance Referral” (SCD 1686) and to forward copy to the designated FS mailbox slot.

- Develop the “CalWORKs Referral Results” (SCD 29) in accordance with Health Alliance procedures and to forward copy to the designated FS mailbox slot when client agrees to have services and activities incorporated in the FS Plan.

Clients who need mental health or substance abuse services who do not qualify for FS or who chose not to enroll in a FS Plan, shall be referred and scheduled to non-FS Health Alliance activities. [Refer to “Health Alliance,” page 41-1] for existing procedures.

11.4 Family Service Plan (SCD 2392)

Upon referral and agreement by the client, the Family Service (FS) Plan (SCD 2392) is developed. The FS multi-disciplinary Team members, including Employment and Housing Focus Team, as appropriate and based on the client’s needs, meet with the client to discuss services needed. If the client agrees to participate in the Family Services Program, then the services are incorporated into a FS Plan. The services are included within a stand-alone [family services only] or an integrated plan [family services and welfare-to-work activities]. Based on information and input from the FS Team and other community partners, the FS EC Specialist will complete the FS Plan.
FS Plans identify activities, needs, services, resources, actions and timelines that are needed to stabilize the family. The maximum length of the FS Plan is six months. Extensions will be considered on a case-by-case basis. If a Good Cause determination is made, then the WTW 24-Month Time Clock can be stopped for up to 6 cumulative months while in a FS Plan.

Once the FS Plan is developed by the FS EC Specialist and signed by the client, upon request, the case is transferred and assigned for intensive case management services to one of the FS EC Specialists. The FS EC Specialist and multi-disciplinary team will closely monitor the case.

11.5 CalWIN

This section provides a summary of the services [Need] types used when referring clients to the Family Services (FS) Unit, new FS Plans and activities associated with Family Services.

11.5.1 CalWIN Client Referral Subsystem

The Client Referral Subsystem is used to refer eligible WTW clients to the FS Unit and to track referral outcomes. One of the following service [Need] types is used by the assigned EC to initiate the referral based on the primary need using the Provider Name, “Family Services Application."

- FS-Domestic Abuse Services
- FS-Substance Abuse Services
- FS-Mental Health Services
- FS-Social Work Services
- FS-Housing Services

11.5.2 CalWIN FS Plans

To track participants in a FS Plan and participants who transition from a FS Plan to a WTW Plan, the following plan descriptions are to be entered by the FS EC Specialist in the Maintain Employment Plan window, [Plan] tab:
CalWORKs Employment Services Handbook

Family Services Program

11.5.3 CalWIN FS Activities

When the FS Plan (FS stand-alone or FS integrated) includes Mental Health, Substance Abuse, or Domestic Violence related activities, the FS EC Specialist assigns the following activities in the Maintain Employment Services Participation [Activity] tab:

- FS Mental Health Services
- FS Substance Abuse Services
- FS Domestic Abuse Services
- FS Integrated DV-WTW Services
- FS Extender-Domestic Abuse Services

Note:
The FS activities must be added to the FS Plan and WTW 2 Plan.
11.6 FS Youth Services

Through the Family Services Program, children of WTW clients can receive services such as but not limited to Substance Abuse, Mental Health, Domestic Violence, and/or At-Risk Youth Services. In order to receive these services, the WTW client must be referred to the FS Multi-disciplinary Team and sign a FS Plan.

11.6.1 CalWIN Client Referral Subsystem

To refer the child for youth services, the assigned EC refers the client using the Client Referral Subsystem by selecting “Family Services Application” as the provider and selecting one of the following as the primary service [Need]:

- “FS-Child Substance Abuse”
- "FS-Child Mental Health”
- "FS-Child Domestic Violence”
- FS-Child Other” (example: At-Risk Youth)

Note:
When both the parent and the child are receiving the above service(s), track the referral via the parent’s FS activity and parent’s Client Referral Subsystem referral [Need]. In the Referral Notes section of the CalWIN Manage Referral Detail window, indicate that the child needs services.

11.6.2 At-Risk Youth Services

At-Risk Youth Services refers to ancillary payments to support activities or services for CWES clients’ children age 13 and over who are on school breaks, such as summer, winter or spring, and:

- Are at risk as documented by school personnel, probation, mental health professionals, Social Workers and other licensed professionals, AND
- May impact the parent’s ability to participate in WTW.
Note:
This program is not designed to cover child care costs or after school activities.

All requests for At-Risk Youth Services must be reviewed by the FS Supervisor or manager for approval. The payment limit is $250 per child per week and is paid through ancillary. Clients must provide receipts within 10 days.

Forms and Verification

The client must submit cost verifications to the FS EC Specialist and sign the “Family Service Plan” (SCD 2392) indicating the child’s name, date of birth and begin and end dates for the activity, along with FS goals and timelines in order to receive assistance. The following verifications are required:

- Cost/information sheet from the provider for the school break activity
- An “Ancillary Expense Estimate, Request & Verification” (SCD 1584) completed by the service provider

CalWIN

The following applies to CalWIN when issuing the At-Risk Youth Services ancillary payment sub-type:

- “FS Stablzttn At-Risk Youth Services” is used as the ancillary payment description subtype.
- In the Assign Ancillary Supportive Service window, select “One Time” as the frequency of the payment.
- The begin and end dates of the ancillary should match the child’s school break activity or At-Risk Program begin and end dates.

Document in Maintain Case Comments by selecting case comment type, “Family Services Case Update” that ancillary is for Family Services, At-Risk Youth Services.

11.7 Family Services Referrals

Eligible WTW clients may be referred for Family Services at any point in the participant flow as follows:
Family Services Program

- Client request (self-referral)
- Service Provider recommendation
- Eligibility Worker
- Employment Counselor; OR
- Social Worker

11.7.1 Referral Process

Referrals for Family Services (FS) may be self-initiated by the client or made through a service provider when a service need is identified. The steps in the table below describe the required actions by the assigned EC when referring the client to the FS Unit. These steps include the actions to be taken by the FS Team for providing the services:
### Step 1: Assigned EC

<table>
<thead>
<tr>
<th>Who</th>
<th>Action</th>
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</table>
| EC  | A. Identifies services or needs with the client.  
|     | B. Discusses Family Services (FS) program requirements with the client. |

**If client...**

**Then...**

- **Does not agree to a FS Plan,**
  - Follows existing Handbook procedures when assigning WTW services, such as:
    - Mental Health
    - Substance Abuse
    - CalWORKs Social Work, or
    - DV Advocacy services

- **Agrees to a FS Plan,**
  - Refers to FS Unit by continuing with Step C below.

**C.** Reviews “Family Services Request & Application” (SCD 2417) to identify FS need, including completion of housing section; assists client with form completion, as needed.

**D.** Ensures that the SCD 2417 is signed by the client.

**E.** Collects appropriate documents/verification to support need, such as court-ordered eviction notice, lease agreement, W-9 for landlord, At Risk Youth documentation, etc.

**F.** Forwards the SCD 2417 along with supporting documents to IDM to be scanned.

**G.** Refers the client to the FS Unit through **Client Referral subsystem** from the **Registration** Function located on CalWIN Main Navigation page following steps below:

**CalWIN Window/Tab** | **Steps**
--- | ---
| Main Navigation | 1. Click the Client Referral heading in the “Action” group box.  
| | 2. Select the Display Referrals window and click [Open].
| Display Referrals | 3. Click [Find] next to the Individual field.
| Clear Individual through CalWIN | 4. Enter the individual's last name, first name, social security number and click [Search].  
| | 5. Click [Select].
| Display Referrals | 6. Click [Add] from the toolbar.
| Inquire on Case Listing | 7. Highlight the correct Case # and Case Name that appears with the most current Application Date.  
| | 8. Click [Close].
### CalWORKs Employment Services Handbook

#### Family Services Program

<table>
<thead>
<tr>
<th>Step</th>
<th>Who</th>
<th>Action</th>
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<tbody>
<tr>
<td>2.</td>
<td>Assigned EC</td>
<td>Individual</td>
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<td>9. Select appropriate language from the drop-down.</td>
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<td>10. Enter Y in the Confidential field.</td>
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<td>11. Enter Y in the Consent on File field.</td>
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<td>12. Enter N in the Print Additional field.</td>
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<td>13. Enter N in the Send Additional field.</td>
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<td>14. Enter Y in Suppress Client Copy field.</td>
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<td>Referred to Office</td>
<td>15. Determine and select the primary service [Need] as follows:</td>
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<td><strong>If Services are for...</strong></td>
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<td>Adult Only,</td>
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<td>Adult and Child</td>
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<td>Child Only,</td>
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<td><strong>Note:</strong> For multiple service needs that include housing, a separate CalWIN referral is required in addition to selecting “FS-Housing Services.” <strong>Examples</strong> - Selects: “FS- Domestic Abuse Services” and “FS-Housing Services”; or “FS - Social Work Services” for school truancy and “FS-Housing Services.”</td>
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<td>16. Click [Find] in “Office Information” group box to search for location &amp; provider.</td>
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<td>Search Location</td>
<td>17. Select Area Served (any Census Tract Number may be selected).</td>
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<td>18. Click [Search].</td>
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<td>19. Select the following: Provider Name: Family Services Application; Office Name: San Jose; Location: 333 W. Julian St., San Jose, CA</td>
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<td>20. Click [Save]. The Reference Number is auto assigned. Make note of the Reference Number to be included with case comments.</td>
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<td>21. Note and enter the Reference Number in CalWIN case comments for future reference.</td>
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<tr>
<td>Step</td>
<td>Who</td>
<td>Action</td>
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<td>3.</td>
<td>Assigned EC</td>
<td>Referral Notes</td>
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<td>22. In the [Referral Notes] tab, list any other pertinent information.</td>
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<td>23. Click [Save].</td>
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<td>Follow-Up</td>
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<td>24. Click [Yes] in the Required field.</td>
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<td>26. Click on the User [Find] button and enter referring EC information and click [Select] to confirm user name.</td>
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<td>27. Click [Save].</td>
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<td>28. Click [Print Referral/Send] button.</td>
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<td>29. Click [OK] on Information pop-up window that appears.</td>
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<td>30. Close the Manage Referral Detail window.</td>
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<td>H. Reviews, assigns and authorizes support services as needed to attend appointment with FS EC Specialist.</td>
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<td>I. Enters CalWIN Case Comment using comment type, “Family Services Case Update.”</td>
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<td>J. Submits “Family Services Program Request &amp; Application” (SCD 2417) and all supporting documents to IDM workstation.</td>
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<tr>
<td>4.</td>
<td>FS Support</td>
<td>A. Receives FS referral via email generated from CalWIN Client Referral Subsystem.</td>
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<td>B. Forwards the FS referral to the appropriate FS Team member based on the service need.</td>
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<td></td>
<td>C. Enters case comments using the appropriate case comment type once the referral is assigned to the FS Team for review.</td>
</tr>
<tr>
<td>Step</td>
<td>Who</td>
<td>Action</td>
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<td>------</td>
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</tr>
</tbody>
</table>
| 5.   | FS Team Member: (Social Worker, Health Alliance, DV Advocate) | A. Receives primary FS referral via email from FS Support.  
B. Schedules appointment with the client.  
**Note:** Coordinates with the FS EC Specialist whenever possible to see the client the same day.  
C. Meets with the client to determine service needs, reviews SCD 2417 and other supporting documents; discusses resources, potential goals, objectives and timelines.  

<table>
<thead>
<tr>
<th>If Client...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| Does NOT want to participate in the Family Services Program, but chooses DV Services, | • Provides DV services per existing DV procedures as outlined in CWES Handbook Chapter 30, "Domestic Abuse" on page 30-1C and CalWIN Announcement 85.  
• Notifies assigned EC, FS Lead, and FS Supervisor by email that client withdrew FS Plan.  
• Coordinates implementation of DV services with assigned EC. |
| Does NOT want to participate in the Family Services Program, but chooses Mental Health and/or Substance Abuse Services, | • Provides mental health and/or substance abuse services per existing procedures as outlined in CWES Handbook Chapter 40, "Health Alliance" on page 41-1.  
• Notifies assigned EC, FS Lead, and FS Supervisor by email that client withdrew FS Plan.  
• Coordinates implementation of Mental and/or Substance Abuse services with assigned EC. |
| Does NOT want to participate in Family Services Program, but chooses Social Work Services, | • Provides social work services based on existing procedures.  
• Notifies assigned EC, FS Lead, and FS Supervisor by email that client withdrew FS Plan. |
| D. Submits to IDM workstation other supporting documents and referral forms.  
E. Enters CalWIN Case Comment using the appropriate case comment type that client withdrew FS request.  
F. When client agrees to a FS Plan, continue with Step 8. |
| 6.   | FS Unit Lead | A. Issues the "Family Stabilization Program Denial" (FSP 2) Notice of Action (NOA) upon receiving email notification from the FS Team Member that the client withdrew FS.  
B. Updates primary referral need [Outcomes] tab with "Withdrew."  
C. Updates CalWIN case comments by using "Family Services Case Update" case comment type. |
### Family Services Program

#### 7. Assigned EC

- **A.** Receives notification from FS Team Member that client withdrew FS services request.  
  
  **Note:** Client may continue to participate in non-FS services.

- **B.** Follows existing procedures, including integrating non-FS services into the existing WTW plan or contacting client for assignment of next WTW activity and assignment of support services needs.

- **C.** Enters Case Comments in CalWIN.

#### 8. FS Team Member

- **A.** Follows the table below when the client agrees to participate in FS services:

<table>
<thead>
<tr>
<th>If Service Need is...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>FS DV,</td>
<td>Completes the SCD 1554 and/or SCD 1555.</td>
</tr>
<tr>
<td>FS Mental Health and/or Substance Abuse Services,</td>
<td>Completes SCD 1686 and SCD 29.</td>
</tr>
<tr>
<td>FS Social Work Services,</td>
<td>Completes SCD 29, SCD 1554 and/or SCD 1555.</td>
</tr>
</tbody>
</table>

- **B.** Issues copies of FS related forms to the client.

- **C.** Emails FS service referral outcome results forms and other supporting documents/verifications to designated Email Global Address mail box: “FS Referral Results.”

  **Note:** Coordinates with the FS EC Specialist whenever possible to see the client the same day.

#### 9. FS Support

- **A.** Retrieves FS Referral Results email and documents from the FS Team Member.

- **B.** Assigns the FS Referral Results to next available FS EC Specialist by email and CC FS Unit Supervisor/Lead.  
  
  **Note:** Include FS related forms (SCD 29, SCD 1554 and/or SCD 1555, and SCD 1686).

- **C.** Updates case comments by using “Assign Fam Stablztin EC Speclst” case comment type.
<table>
<thead>
<tr>
<th>Step</th>
<th>Who</th>
<th>Action</th>
</tr>
</thead>
</table>
| 10.  | FS EC Specialist | A. Retrieves FS Referral Results email and documents.  
B. Reviews forms and documents to determine appropriate FS Plan (FS stand-alone or FS integrated).  
C. Schedules appointment with client to sign “Family Service Plan” (SCD 2392) for FS stand-alone; or SCD 2392 and WTW 2 for FS integrated.  
Note: Coordinates with FS Team Member whenever possible to see client same day.  
D. Meets with client to complete appropriate FS Plan based on client’s circumstances.  
E. Ends Active WTW Plan, activities and supportive services.  
F. Enters one of the following FS Plan numbers in the Maintain Employment Plan window [Plan] tab:  
  • For stand-alone plan, enters: FSONLYPLAN-#  
  • For integrated plan, enters: FSINTGPLAN-#  
Note: The plan number “#” follows the plan name. Example: FSONLYPLAN-1  
G. Updates Client Referral Subsystem referral [Outcome] to “Approved.” |
Family Services Program

11. **FS EC Specialist**
   
   **H.** Assigns and schedules the following Family Services activity(ies) from the Maintain Employment Services Participation [Activity] tab, and updates the Maintain Activity status window as appropriate:
   
   - “FS Mental Health Services”
   - “FS Substance Abuse Services”
   - “FS Domestic Abuse Services”
   - “FS Integrated DV-WTW Services”
   - “FS Extend-Domestic Abuse Service”
   
   And for an integrated FS Plan, adds appropriate WTW activity(ies), and updates activity status, as appropriate.

   **I.** Assigns supportive services for duration of the FS Plan.

   **J.** Updates [Registration] window with “Deferred/Good Cause” or activity status with “WTW Good Cause” if the client is unable to meet participation requirements.  
   **Note:** These steps ensure the WTW 24-Month Time Clock stops.

   **K.** Submits to IDM workstation SCD 2392 and WTW 2 (for integrated plan) and provides copies to client.

   **L.** Informs client as to how FS Plan will be monitored, tracked, and subsequent activities implemented, if applicable.

   **M.** Implements first goal or concurrent goals/tasks and required actions as outlined in the FS Plan.

   **N.** Emails FS Supervisor and FS Supervisor and FS Lead requesting case to be transferred.  
   **Exception:** One-time only housing payments without ongoing Family Services do not require assignment to the FS Unit.

   **O.** Enters case comment using comment type, “Family Services Case Update.”

12. **FS Supervisor/Lead**
   
   **A.** Retrieves email for case transfer request from the FS EC Specialist.

   **B.** Emails the request to the respective Unit Supervisor and assigned EC for the case transfer request.
11.8 Family Services Housing Assistance

Housing is a major barrier to Welfare-to-Work participation and family stability. As part of its wrap-around services, the Family Services Program helps eligible CalWORKs families with housing assistance and support. The Family Services Program includes the Family Stabilization Housing Assistance Program, which focuses on homeless prevention, while the CalWORKs Housing Support Program (CHSP) aims to assist families who are already homeless by providing housing support. Each of these two housing programs has its own rules and procedures, although some may be the same. [Refer to “Family Stabilization Housing Assistance,” page 11-24 and “CalWORKs Housing Support Program” on page 11-32 for policy and referral process for each program].

CWES clients who are eligible for either program are referred to the Family Services Unit for housing assistance and support. The first housing program option to be explored with the client is the CHSP.

11.8.1 Employment and Housing Focus Team

The FS Team is also part of the Employment and Housing Focus Team, that includes Abode Housing Staff and other community partners to assist client meet employment goals and objectives to sustain housing under CalWORKs Housing Support. [Refer to “Employment and Housing Focus Team,” page 11-34] for additional information.

<table>
<thead>
<tr>
<th>Step</th>
<th>Who</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | Assigned EC | A. Prepares case for transfer to Control Clerk for assignment to FS EC Specialist within 2 working days of receiving request.  
**Note:** DFCS Common Case (Family Maintenance/Family Reunification) client’s CWES case is not transferred. The Common Case EC follows up with the FS EC Specialist.  
B. Ensures all case actions are current and updated per case transfer policy.  
C. Completes the “Contact-Action Summary Case Transfer” (SCD 163T), and on the comments section of the SCD 163T indicates the name of the FS EC Specialist to receive the case.  
D. Submits the case to the supervisor for case transfer.  
E. Enters CalWIN Case Comment using comment type, “Family Services Case Update.” |
Referrals

When making the referral through the CalWIN **Client Referral Subsystem**, the assigned EC uses a generic housing need, “FS Housing Services,” when the FS need is housing. The initial generic housing need is used for referral assignment purposes only and not for data reporting. [Refer to “Referral Process,” page 11-12] for initial referral process.]

Note:
The CHSP and Family Stabilization Housing Assistance program are separate and apart from the Homeless Assistance payments that are issued by Eligibility Workers. Clients may also be instructed to contact the Benefits Office to explore payment options under CalWORKs Homeless Assistance Program.

11.8.2 Financial Literacy

The Family Stabilization Housing Assistance and CalWORKs Housing Support Program require that clients complete a financial literacy workshop or workbook. Financial literacy must be completed prior to issuance of payment.

Metro Adult Education Sessions to Enhance Professional Skills (STEPS) Program provides Financial Literacy services.

Note:
If client is employed full-time and/or unable to attend the workshop, the client may complete a Financial Literacy Workbook provided through the FS EC Specialist.

11.8.3 Referrals to Workshop

Referrals to the financial literacy workshop are done by the FS EC Specialist through the **Client Referral Subsystem** in CalWIN following the procedural steps below:

Note:
The Financial Workbook is also tracked through the **Client Referral Subsystem**.
<table>
<thead>
<tr>
<th>Steps</th>
<th>Who</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>FS EC Specialist</td>
<td><strong>For clients who are attending STEPS Financial Literacy Workshop:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>A. Refers client to “Metro Senter Rd” through the Client Referral Subsystem to track Financial Literacy outcome. In the Referral [Need] tab, selects one of the following based on type of housing program:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When referred to the Family Stabilization Housing Assistance Program, selects “FS Stblztn-Financial Workshop.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When referred to CalWORKs Housing Support Program (CHSP), selects “CHSP-Financial Workshop.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>B. In the Referral Notes section, include all income (Take Home Pay, CalWORKs cash grant, Work Study, Social Security Income, Help from Family, etc.) and any pertinent information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>For clients who are employed full-time and/or unable to attend Financial Literacy Workshop:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>C. Refers client to “Metro Senter Rd” through the Client Referral Subsystem to track Financial Literacy outcome. In the Referral [Need] tab, selects one of the following based on type of housing program:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When referred to the Family Stabilization Housing Assistance Program, selects “FS Stblztn-Financial Workshop.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When referred to CalWORKs Housing Support Program (CHSP), selects “CHSP-Financial Workshop.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>D. In the referral notes section, include that client is FTE and will not be attending the Financial Literacy Workshop.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E. Provides client with Financial Literacy Workbook and instruction to complete Activities 1 through 8 and return workbook to FS EC Specialist within 7 calendar days. <strong>Note:</strong> Informs client to contact STEPS Metro Ed Representative if they need assistance to complete the workbook.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>F. Once the workbook activities pages are received, reviews the pages and signs Section IV -County Use Only- of the SCD 2417. [Refer to “Authorization and Payment Process,” page 11-27 for approval/denial steps.]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>G. Submits workbook activity pages to IDM workstation.</td>
</tr>
</tbody>
</table>

Revised: 08/19/16
Update # 16-16
<table>
<thead>
<tr>
<th>Steps</th>
<th>Who</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2.    | STEPS Rep. | For clients who are attending STEPS Financial Workshop:  
A. Reviews SCD 2417 Section III, budget information with client.  
B. Signs and dates Section IV -STEPS Use Only- of the SCD 2417.  
C. Forwards SCD 2417 to FS EC Specialist.  
For clients who are employed full-time and/or unable to attend workshop:  
D. Assists the client in completing workbook upon request by the client, or if additional information is needed. |
| 3.    | FS EC Specialist | A. Updates the STEPS **Client Referral Subsystem** Outcome for the Financial Literacy referral as follows:  
• When the client completes Workshop/Workbook, updates [Outcome] to “Complete.”  
• When the client does not complete Workshop/Workbook updates [Outcome] to “Incomplete.”  
B. Enters CalWIN Case Comment using comment type, “Family Services Case Update.” |

<table>
<thead>
<tr>
<th>If the client...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| Returns incomplete Financial Literacy Workbook, | • Contacts the client to obtain and enter missing information.  
• Prints client's name, CalWIN case number, and assigned FS EC Specialist name and worker number on top of Activity 1 page.  
**Note:** If client fails to respond within 30 days, housing request will be denied following the denial process. |
| Does not return the Financial Literacy Workbook, | • Follows up with client to ensure workbook is returned within 30 days.  
**Note:** If client fails to return the workbook within 30 days, housing request will be denied following the denial process. |
11.9 Family Stabilization Housing Assistance

The Family Stabilization Housing Assistance program is designed as a homeless prevention measure to stabilize housing needs for eligible CWES clients and ultimately engage and increase their participation in WTW activities and help them towards their path to self-sufficiency.

11.9.1 Homeless/Housing Condition for Program Eligibility

Eligible CWES clients must meet one or more of the conditions below to be eligible to apply for the Family Stabilization Housing Assistance program. The participant must provide verification of eviction, past due rent or homelessness at the time of application:

- Be homeless – such as lacking a fixed and regular nighttime residence, or living in a shelter
- In receipt of an eviction notice
- Is behind in rent and may be subject to eviction

11.9.2 Eligible Families

To be eligible for the Family Stabilization Housing Assistance program, the CWES client must:

- Have time remaining on the WTW 24-month time clock, AND
- Be an active CWES client (registrant), OR
- Be in Good Cause status, OR
- Be in an Exempt status, OR
- Agree to cure WTW Sanction and sign curing sanction plan (if the client is in a sanctioned status)
11.9.3 Services Offered

The Family Stabilization Housing Assistant program includes but is not limited to the services listed below:

- Payment of security deposit which may include first month rent, deposit and/or last month’s rent (“Double deposit” - first/last/deposit) if required to secure housing

- Emergency lodging/hotel assistance payment
  
  Note: Refer to FS Supervisor or Manager for approval guidelines, if needed.

- Utility payments needed to retain/obtain housing

- Moving costs

- Referrals/assistance locating housing

- Financial literacy/education referrals

- Other service referrals to support housing stability such as housing related fees

11.9.4 Application

The client must complete the “Family Services Program Request & Application” (SCD 2417), including completion of housing related questions and budget information. The SCD 2417 is used for both the Family Stabilization Housing Assistance and CalWORKs Housing Support Program.

When the Family Stabilization Housing Assistance criteria is met, the FS EC Specialist completes the “Family Stabilization Housing Assistance” referral (SCD 2416) and forwards to Abode with supporting documents such as lease/rental agreements, eviction notices, W-9, etc).

11.9.5 Authorization and Vendor Payment

Family Stabilization Housing Assistance payments are limited to housing prevention. The FS EC Specialist approves the service need request by completing the “Family Stabilization Housing Assistance Referral” (SCD 2416), and forwarding it to Abode for issuance of vendor payment. At the time of referral to Abode, the client must meet the financial education/literacy and sustainability requirements.
Supporting documents need to be attached to the SCD 2416, such as lease/rental agreement. A completed “Request for Taxpayer Identification Number and Certification” (W-9) is also needed for vendor payment.

Note:
The W-9 is the same form used for child care providers for income tax reporting purpose and issuance of 1099.

Payment Limits

The payment can be up to $2,500.00 per month and is limited to a maximum of two months of assistance not to exceed a total of $5,000.00. Additional requests must be escalated by the FS EC Specialist to management for review and consideration.

Note:
Requests higher than $5,000.00 or $2,500.00 per month require a second level of approval by the FS Supervisor or CWES Manager assigned to FS prior to approving the vendor payment.

11.9.6 CalWIN

The Client Referral Subsystem in CalWIN is used for tracking the referral outcome for Family Stabilization Housing Assistance. The referral is identified with the provider, “Family Services Application.”

Note:
The Client Referral Subsystem and the provider “Family Services Application” are also used for the CalWORKs Housing Support Program. [Refer to “CalWORKs Housing Support Program,” page 11-32] for policy and referral process.

Family Stabilization Housing Types

Upon receipt of the SCD 2416 from Abode with Part C completed, the Client Referral Subsystem Outcome [tab] is updated with one of the following:

- “FS - Approved”
- “FS - Denied”
- “FS - Withdrew,” OR
• “FS Referral Invalid”

Authorization/Payment

While payments are approved by the FS EC Specialist, Abode issues the payments directly to the provider as a vendor payment outside of CalWIN.

On a case-by-case basis, payments are issued through CalWIN by the FS EC Specialist via Warrant or Electronic Benefit Transfer (EBT) directly to the client using one or more of the following Family Stabilization Housing ancillary payment subtypes:

• “FS Stablztn Rental Assist”
• “FS Stablztn Security Dep”
• “FS Stablztn Utility Paymnt”
• “FS Stablztn Moving Costs”
• “FS Stablztn Hotel Assist”
• “FS Stablztn Other”

11.9.7 Authorization and Payment Process

Follow the steps below when processing the Family Services Request & Application:
## Step 1.
### FS EC Specialist

**Upon completion of Financial Literacy Workshop...**

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Stabilization Housing Assistance eligibility criteria is met,</td>
<td>A. Verifies that Section IV of SCD 2417 is completed by STEPS.</td>
</tr>
<tr>
<td></td>
<td>B. Completes Section V (County Use Only) of the SCD 2417.</td>
</tr>
<tr>
<td></td>
<td>C. If housing documents are not available or complete, follow-up with the client. <strong>Note:</strong> Abode will not issue payment until all required supporting documents are received.</td>
</tr>
<tr>
<td></td>
<td>D. Completes Sections A and B of the SCD 2416 with authorized service need(s) and amounts.</td>
</tr>
<tr>
<td></td>
<td>E. Emails SCD 2416 with supporting documents (including Lease/Rental Agreement, W-9) to Abode at: <a href="mailto:FS@abodeservices.org">FS@abodeservices.org</a></td>
</tr>
<tr>
<td></td>
<td>• If already in Job Club/SJS, alerts FS ECC Supervisor and Unit Lead by email.</td>
</tr>
<tr>
<td></td>
<td>• If not in Job Club/SJS, refers/schedules using Family Stabilization Housing [Location] tab.</td>
</tr>
</tbody>
</table>

### Abode

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Receives SCD 2416 and required supporting documents via email with authorized service need(s) and amount(s).</td>
</tr>
<tr>
<td>B. Issues vendor payment directly to service provider (landlord, utility company, etc).</td>
</tr>
<tr>
<td>C. Completes Part C of SCD 2416.</td>
</tr>
<tr>
<td>D. Emails SCD 2416 to the referring FS EC Specialist within 30 days.</td>
</tr>
<tr>
<td>Step</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>3.</td>
</tr>
</tbody>
</table>
|      | A. Upon receipt of SCD 2416 with part Part C completed by Abode:  
|      |   • If payment is issued, then updates Client Referral Subsystem, “FS Housing Services” referral with “FS-Approved” and issues “Ancillary Approval” (NA 832) of housing request.  
|      |   • If payment is NOT issued, completes a new SCD 2416 for the revised higher need amount upon request from Abode and emails the new SCD 2416 to Abode @ FS@abodeservices.org  
|      | B. Forwards SCD 2416, SCD 2417 and supporting documents to IDM.  
|      | C. Updates case comments by selecting “Family Services Case Update” comment type. |
### Step 4: FS EC Specialist

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Upon completion of Financial Literacy Workshop...</td>
</tr>
</tbody>
</table>

#### If...

A. Upon receipt of SCD 2416 with Part C completed by Abode, updates **Client Referral Subsystem**, “FS Housing Services” referral [Need] with one of the following denial reasons: “FS Denied,” “FS Withdrew,” or “FS Referral Invalid.”

B. issues FSP 2 denial NOA in CalWIN for Family Stabilization Housing Assistance request.

C. Records denial in Client Referral Subsystem as follows:

- In the Referred to Office Tab, select from Need “FS Non-Participation.”
- In Confidential field and Consent on File, select “Yes.”
- Select “No” for Print Additional and Send Additional Email fields.
- Select “Yes” to Suppress client copy.
- In the [Referral Notes] tab, enter “Do Not Assign.”
- In the [Follow-Up] tab, select “Yes” in the required field and “One Day” in the “Follow-up” field.
- Enter date completed and Referral Outcome as “FSP 2 - Ineligible.”
- Click Save and [Print/Send] Button.

D. Forwards SCD 2416, SCD 2417 and FSP 2 and supporting documents to IDM.

E. Updates case comments by selecting “Family Services Case Update” comment type.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5. FS EC Specialist | **When client is unable to attend the STEPS Financial Literacy Workshop and workbook is issued:**  
| If Client... | Then... |
| Returns Completed Financial Literacy Workbook and household budget demonstrates sustainability, | A. Reviews workbook for completion.  
B. Emails SCD 2416 with supporting documents (including Lease Agreement, W-9) to Abode. **Note:** If housing documents are not available, the FS Specialists follows-up with client.  
C. Completes Sections A and B of the SCD 2416 with authorized service need(s) and amounts. |
| 7. FS EC Specialist | A. Upon receipt of SCD 2416 with Part C completed by Abode, updates **Client Referral Subsystem**, “FS Housing Services” referral [Need] with “FS - Approved.”  
B. After payment is made, issues “Notice of Action - Ancillary Expenses” (NA 823) approval of housing request.  
C. Forwards Workbook activities pages, SCD 2416, SCD 2417 with supporting documents to IDM.  
D. Updates case comments by selecting “Family Services Case Update” comment type.  
E. If payment is not issued, then:  
   • Completes a new SCD 2416 for the revised higher need amount.  
   • Emails the new SCD 2416 to Abode @ FS@abodeservices.org |
## 11.10 CalWORKs Housing Support Program

The CalWORKs Housing Support Program (CHSP) is designed to assist eligible CalWORKs families who are experiencing homelessness. This program is separate from the Homeless Assistance that is issued by the Eligibility Worker, and is in addition to the Family Stabilization Housing Assistance program. The FS EC Specialist is to explore CHSP as the primary housing program.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>8. FS EC Specialist</td>
<td>Returns Completed Financial Literacy Workbook and household budget does not demonstrate sustainability,</td>
</tr>
<tr>
<td></td>
<td>A. Reviews workbook for completion.</td>
</tr>
<tr>
<td></td>
<td>B. Prints client’s name, CalWIN case number, and FS EC Specialist name and worker number on top of the Activity 1 page.</td>
</tr>
<tr>
<td></td>
<td>C. Refers client to Supervised Job Search using “Family Stabilization Housing” [Location].</td>
</tr>
<tr>
<td></td>
<td>D. Forwards Workbook Activity pgs. to IDM workstation.</td>
</tr>
<tr>
<td></td>
<td>E. Updates case comments by selecting “Family Services Case Update” comment type.</td>
</tr>
</tbody>
</table>

Returns incomplete Financial Literacy Workbook,  
A. Contacts client to obtain and enter missing information in the workbook. |

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household budget demonstrates sustainability,</td>
<td>Follow Step 5-B through 5-C, and 7-A through 7-E.</td>
</tr>
<tr>
<td>Household budget does not demonstrate sustainability,</td>
<td>Follow Step 8-B, through 8-E.</td>
</tr>
</tbody>
</table>

Does not return the Financial Literacy Workbook,  
A. Follows up with client to ensure workbook is returned within 30 days.  
**Note:** If client fails to return the workbook within 30 days, housing request is denied following the denial process.  
B. Updates case comments by selecting “Family Services Case Update” comment type.
The CHSP is included within the menu of services offered through the Family Services Unit. The FS EC Specialist coordinates these services for eligible CWES participants and initiates the referral to the CHSP service provider. The CHSP is run by Abode Housing Services who is co-located at CWES 1879 Senter Road, San Jose and provides services in the North and South County CWES Offices.

11.10.1 Homeless/Housing Condition for Program Eligibility

Eligible CalWORKs families must meet the criteria below to be eligible to apply for the CalWORKs Housing Support Program:

• Having a primary nighttime residence that is a supervised publicly or privately operated shelter designed to provide temporary living accommodations, OR

• Residing in a public or private place not designed for, or ordinarily used as a regular sleeping accommodation for human beings, OR

• In receipt of a judgment for eviction, as ordered by the court.

11.10.2 Eligible CalWORKs Families

All CWES clients (active, exempt, curing sanction), including those who have exhausted their WTW 24-Month Time Clock are eligible to apply for the CalWORKs Housing Support program.

11.10.3 Services Offered

The CalWORKs Housing Support Program (CHSP) includes, but is not limited to the following services:

• Assistance locating and securing housing

• Payment of security deposit (first month rent, deposit/last month rent) required to secure housing

• Emergency lodging/hotel assistance

• Utility payments needed to retain/obtain housing

• Moving arrangements and moving costs

• Assistance understanding leases
• Renter’s insurance if required to secure housing
• Short-term housing subsidy where household transitions gradually to full payment of rent.
• Mediation and outreach to landlords
• Client re-assessments
• Financial education referrals
• Other service referrals to support housing stability

11.10.4 Application

The client must complete the “Family Services Program Request & Application” (SCD 2417), including completion of housing related questions and budget information. The SCD 2417 is used for both the Family Stabilization Housing Assistance and CalWORKs Housing Support Program.

When the CalWORKs Housing Support Program criteria is met, the FS EC Specialist completes the “CalWORKs Housing Support Program” referral (SCD 2419) and forwards to Abode with supporting documents such as lease/rental agreements, eviction notices, W-9, etc).

11.10.5 Employment and Housing Focus Team

The Employment and Housing Focus Team (EHFT) is created to assist client with housing sustainability and plan coordination. The team is comprised of staff from Abode, FS EC Specialist and the ECC EC.

Note:
The DFCS Social Worker and/or Common Case EC is contacted to participate in the initial meeting for DFCS/CWES Common Case clients (Family Maintenance or Family Reunification). [Refer to “DFCS/DEBS Common Cases,” page 27-1 for additional information.]

The FS EC Specialist schedules the initial meeting with the client and the team members through the Shared Outlook Calendar to determine if client is a suitable candidate for CHSP. Client must be willing and committed to work toward achieving plan goals and objectives, meeting weekly with team members.
11.10.6 Weekly Housing Search Plan

All CHSP clients must attend an initial meeting with the EHFT to determine if client is a suitable candidate. When deemed a suitable candidate, a “Family Services Weekly Housing Search Plan” (SCD 2418-B) is developed during the initial team meeting, and integrated into the Family Service Plan (SCD 2392). The plan identifies housing search goals and objectives. Outcomes are evaluated during the weekly team meetings. Client is also required to attend case conferences that may include other service providers, as needed.

11.10.7 Weekly Employment Plan

All CHSP clients must attend an initial meeting with the EHFT to determine if client is a suitable candidate. When deemed a suitable candidate, a “Family Services Weekly Employment Plan” (SCD 2418-A) is developed during the initial team meeting, and integrated into the Family Service Plan (SCD 2392). The plan includes completing job search action plans for the present week and following up on pending applications and job leads. Weekly outcomes are evaluated during the weekly team meetings. Client also is required to attend case conferences that may include other service providers, as needed.

Not all CHSP clients are required to complete the SCD 2418-A. The client may meet the income guidelines (as is the case with, for example, having sustainable earnings and/or in receipt of a Section 8 Voucher), but only need help with the housing search.

Incentives

During weekly meetings, the team determines if client is eligible for the incentive. When client is determined eligible, the FS ECC EC III issues incentive. When the incentive is issued via CalWIN, the Ancillary sub-type “HSP Other” is selected and in the “Note” field, enter “HSP Incentive.” The “Ancillary Approval/Denial” (NA 823) notice is used when authorizing the incentive.

11.10.8 Assistance/Payment Amounts Guidelines

The CalWORKs Housing Support Program (CHSP) payments are based on the family needs and the CHSP service provider’s guidelines. In general, the service provider, Abode, makes subsidy payments directly to the landlord or other entity on behalf of the client.
The initial generic housing Need “FS Housing Services” in CalWIN is used for tracking the referral outcome for CalWORKs Housing Support Program.

Upon receipt of the SCD 2419 from Abode with Part C completed, the **Client Referral Subsystem** Outcome [tab] is updated with one of the following:

- “HSP - Approved”
- “HSP - Denied”
- “HSP - Withdrew”
- “HSP - Referral Invalid”
## 11.10.10 Authorization Process

Follow the steps below when processing the CalWORKs Housing Support application request:

<table>
<thead>
<tr>
<th>Step</th>
<th>Who</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | FS EC Specialist | **A.** Determines eligibility for CalWORKs Housing Support, including completion of Financial Literacy Workshop/Workbook.  
B. Verifies that Section IV of SCD 2417 is completed by STEPS.  
C. Completes Section V (County Use Only) of the SCD 2417.  
D. If housing documents are not available or complete, follows up with client.  
E. Completes Sections A and B of the SCD 2419.  
F. Emails SCD 2419 with supporting documents (including Lease/Rental Agreements, W-9, etc) to Abode at: CalWORKsHousing@abodeservices.org  
G. Schedules client to attend initial EHFT meeting with Abode and Employment Connection Center, based on Shared Outlook Calendar entitled, “EmplHousingFocusMtg.” |

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already in Job Club or SJS</td>
<td>Notifies FS ECC Supervisor and unit lead by email.</td>
</tr>
<tr>
<td>Not in Job Club or SJS</td>
<td>Refers to Job Club/SJS using [Location] tab “CalWORKs Housing Support Housing.”</td>
</tr>
</tbody>
</table>

2. **Employment and Housing Focus Team:** (FS EC, Abode, FS ECC EC III)  
A. Meets with client to determine if client is suitable candidate.  

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| Client is determined a suitable candidate, | a. Explains SCD 2418-A and SCD 2418-B plans and objectives.  
b. Assists with development of FS Plan, SCD 2418-B and/or SCD 2418-A.  
c. Meets with client on weekly basis and determines if eligible for weekly incentives. |
| Client is NOT determined a suitable candidate | a. Explains program requirements to client.  
b. FS EC follows established denial/non-participation process. |
Family Services Program

CalWORKs Employment Services Handbook

Note:
Abode/FS EC Specialist/FS ECC EC III may schedule the EHFT weekly meeting via Shared Outlook Calendar.

### 11.11 Bay Area Furniture Bank (BAFB)

Bay Area Furniture Bank (BAFB) is a non-profit organization whose objective is to provide furniture and other household items to eligible individuals and families.
11.11.1 Referrals

Clients are served on a referral basis only. The organization receives referrals from community-based organizations, including referrals submitted by Abode on behalf of Family Services participants.

11.11.2 Services

When Abode meets with Family Stabilization and CalWORKs Housing Support families, Abode will also assess the need for household items. BAFB requires a $75 processing fee and a delivery fee of $100 when delivered to client. The fees are paid by the FS EC Specialist via Ancillary directly to BAFB as a reimbursement vendor payment.

11.11.3 Procedures

Abode, BAFB and the FS EC Specialist shall follow the procedures below:

<table>
<thead>
<tr>
<th>Who</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abode</td>
<td>• Meets with clients per existing procedures.</td>
</tr>
<tr>
<td></td>
<td>• Determines need for furniture and other household items.</td>
</tr>
<tr>
<td></td>
<td>• Completes internal BAFB referral form with client.</td>
</tr>
<tr>
<td></td>
<td>• Emails referral form to BAFB representative.</td>
</tr>
<tr>
<td>BAFB</td>
<td>• Receives and processes referral.</td>
</tr>
<tr>
<td></td>
<td>• Once request is approved, arranges delivery time/date of furniture with Abode at 1879 Senter Road.</td>
</tr>
<tr>
<td>Abode</td>
<td>• As soon as BAFB delivers furniture to Abode, forwards internal referral form via Email to FS unit for payment.</td>
</tr>
<tr>
<td></td>
<td>• Arranges delivery of furniture to client's home.</td>
</tr>
</tbody>
</table>
11.12 Monitoring FS Plans

The FS EC Specialist follows the steps below when monitoring Family Plans:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Who</th>
<th>Action</th>
</tr>
</thead>
</table>
| FS EC | • Within ten working days of receiving referral form, assigns, approves and authorizes $175 vendor payment for processing and delivery fees as follows:  
  - Adds Ancillary supportive services type.  
  - Selects sub-category “Other” within the Supportive Services Description drop-down.  
  - In Provider group box, clicks [Find] button to find and select provider, Bay Area Furniture Bank (provider ID 215452).  
  - In the Pay To field, selects “Provider” and “Payee Modifier “For.”  
  - In the Payment Handling group box, selects “Paid to Provider.”  
  - Selects “Warrant” under Issuance Type and “One Time” under Frequency, and enters $175.00 in the Amount field.  
  **Note:** When item is picked up by client, only the $75 processing fee will be on the referral form for vendor payment.  
  - Selects “Approved” under Status and “Not Applicable” under Category.  
  • Authorizes Ancillary supportive services by Provider via “Regular Mail” under Issuance Method.  
  • Issues “Ancillary Expenses Approval” Notice (NA 823) to client.  
  • When issuing shelf stock NA 823, scans copy into IDM.  
  • Enters case comments using “Family Services Case Update” case comment type. |
1. A. Receives case and conducts case review of FS Plan and actions and consults with multi-disciplinary team as needed.

B. Consults weekly with Employment and Housing Focus Team

C. Monitors FS Plan activities and timelines by providing on-going contact ranging from daily to weekly, depending on client’s situation.

D. Follows up with Abode and updates CalWIN accordingly.

E. Updates FS activity status(es) in the **Maintain Activity Status** window.

F. When meets Good Cause Criteria, stops WTW 24-Month Clock for up to 6 cumulative months by selecting “WTW Good Cause” activity status.

<table>
<thead>
<tr>
<th>If Client...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agrees to resume,</td>
<td>• Updates FS Plan, timelines, goals, as appropriate.</td>
</tr>
</tbody>
</table>
| Requires a deferral for Good Cause for less than 30 days, | • Enters “WTW Good Cause” activity status.  
• Reviews FS Plan at the end of deferral period. |
| Requires deferral for Good Cause for more than 30 days, | • Ends FS Plan and activities.  
• Based on Plan Type, grants Good Cause through:  
  • Registration window for stand-alone plan, or  
  • Maintain Activity Status for Integrated Plan.  
• Enters in CalWIN: WTWPLAN-CMPLTDFS |
| Requires an Exempt-Volunteer Status | • Follows established exempt-volunteer procedures.  
• Monitors FS plan. |
| Requires an Exemption or Exempt-Volunteer Status Ends, | • Ends FS Plan and activities.  
• Enters in CalWIN: WTWPLAN-CMPLTDFS without WTW activities recorded. Length of Plan “1”, Length of Plan Unit “Days” and once Saved, update Plan Status to Completed.  
• Follows exemption or Exempt-Volunteer procedures. |
|   | Does not agree to resume, | - Ends FS Plan and activities.  
|   |                        | - Issues “FS Change in Program Status” (FSP 3) in CalWIN.  
|   |                        | - Records non-participation in **Client Referral Subsystem** as follows:  
| 2. |                        |     • In the Referred to Office Tab, select from Need drop-down “FS Non-Participation”  
|   |                        |     • In Confidential field and Consent on File, select “Yes.”  
|   |                        |     • Select “No” for Print Additional and Send Additional Email fields.  
|   |                        |     • Select “Yes” to Suppress client copy.  
|   |                        |     • In the [Referral Notes] tab, enter “Don Not Assign.”  
|   |                        |     • In the [Follow-Up] tab, select “Yes” in the required field and “One Day” in the “Follow-up” field.  
|   |                        |     • Enter date completed and Referral Outcome as “FSP 3- No Good Cause.”  
|   |                        |     • Click Save and [Print/Send] Button.  
|   |                        | • Schedules client to sign WTW Plan.  
|   |                        | • Enters in CalWIN: WTWPLAN-FAILEDFS |
| 3. | Does not respond, | • Ends FS Plan and activities.  
• Schedules client to sign WTW Plan.  
• Issues “FS Change in Program Status” (FSP 3) in CalWIN. |
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<tr>
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</thead>
<tbody>
<tr>
<td></td>
<td>If...</td>
<td>• Then...</td>
</tr>
<tr>
<td></td>
<td>Shows,</td>
<td>• Determines next WTW Plan.</td>
</tr>
</tbody>
</table>
| | No Shows, | • Enters in CalWIN the following:  
**WTWPLAN-FAILEDFS**  
• Records denial in CalWIN  
**Client Referral Subsystem**  
following step 2 above.  
• Starts NONC process per current process. |
| | If Client... | Then... |
| | Completes FS Plan requirements and signs WTW 2, | • Ends FS Plan (FS Stand-alone or FS-integrated) and activities.  
• Enters the WTW Plan, “WTWPLAN-CMPLTDFS” in CalWIN.  
• Enters WTW activities and supportive services.  
• Transfers the case per existing procedures. |
| | Completes FS Plan requirements and does not sign WTW 2, | • Attempts to re-engage client into WTW.  
• If unable to engage client, follows the Non-Compliance process. |
| | Not Meeting FS Plan requirements. | • Consults with FS multi-disciplinary team for corrective action.  
• Contacts client to attempt to re-engage in FS or to determine if FS still needed: |
| | If Client... | Then... |
| | Agrees to resume, | • Updates FS Plan, timelines, goals, as appropriate. |
| | Requires a deferral for Good Cause for less than 30 days, | • Enters “WTW Good Cause” activity status.  
• Reviews FS Plan at the end of deferral period. |
### Family Services Correspondence

The following brochure, forms and notices are used to support Family Services Program as follows:

#### 11.13.1 SCD 2390

The “Family Services Program” (SCD 2390) brochure is provided to WTW participants during Orientation as part of the Orientation packet. The brochure may also be provided at any point during the WTW participant flow process.

#### 11.13.2 SCD 2417

The “Family Services Program Request & Application” (SCD 2417) is a substitute for the State “Family Stabilization Program Evaluation Request,” (FSP 1) form. The SCD 2417 is provided by CWES and Community Partners and completed by clients to request FS services, including Family Stabilization Housing Assistance for...
homeless prevention and CalWORKS Housing support to assist clients who are homeless or being evicted. The form includes a cover sheet describing available services. The form is completed by the client and forwarded to the assigned EC.

11.13.3  W-9

The “Request for Taxpayer Identification Number and Certification” (W-9) is completed by the landlord. The form is used to issue a 1099 to landlords for end of the year income tax purposes. This form is also used for child care providers.

11.13.4  SCD 2392

The “Family Service Plan” (SCD 2392) describes the services that are provided to the client. It contains timelines for achieving goals and is completed as follows:

• When client agrees on an integrated FS Plan, a WTW 2 is also completed.
• When client agrees on a FS stand-alone plan, only the SCD 2392 is completed.

11.13.5  SCD 2418-A

The “Family Services Weekly Employment Plan” (SCD 2418-A) is completed by the client to provide weekly status update to job search goals and objectives. The information on the SCD 2418-A is incorporated into the FS Plan. The form is also used by the FS ECC EC III to document weekly incentive payments.

11.13.6  SCD 2418-B

The “Family Services Weekly Housing Search Plan” (SCD 2418-B) is completed by the client to provide weekly status update to housing search goals and objectives. The information on the SCD 2418-B is incorporated into the FS Plan.

11.13.7  SCD 2416

The “Family Stabilization Housing Assistance” referral (SCD 2416) is completed by the FS EC Specialist to refer client to Abode for the Family Stabilization Housing Assistance. Parts A and B are completed by the FS EC Specialist to indicate services approved, and forwarded to Abode with supporting documents.

Abode returns form to FS EC Specialist with Part C completed with outcome information.
The “CalWORKs Housing Support Program” referral (SCD 2419) is completed by the FS EC Specialist to refer client to Abode for CHSP. Parts A and B are completed by the FS EC Specialist to indicate amount to be paid, and forwarded to Abode with supporting documents.

Abode returns form to FS EC Specialist with Part C completed with enrollment information.

The “CalWORKs Referral Results” form (SCD 29) is used by Mental Health, Substance Abuse and Social Work staff to incorporate services into the FS Plan.

Note:
For DV continue using the “CalWORKs Domestic Abuse Service Plan” (SCD 1555).

The CalWORKs Domestic Abuse Participation Status (SCD 1554) includes exemption/waiver information, which is incorporated into the FS Plan.

The “CalWORKs Domestic Abuse Service Plan” (SCD 1555) includes steps/timelines for service provider’s activities, which are incorporated into the FS Plan.

The “Family Stabilization Program Denial” (FSP 2) state Notice of Action (NOA) is used to notify clients of the reason for denial of FS services, including Family Stabilization Housing Assistance. For tracking purposes, the CalWIN version of the FSP 2 must be used.
11.13.13  FSP 3

The “Family Stabilization Program Change in Program Status” (FSP 3) is a state NOA used to notify clients that they are being removed from the FS program due to not having a good reason for not complying with their FS Plan. The NOA includes an appointment section to schedule client to sign a WTW Plan.

11.13.14  NA 823

The “Notice of Action - Ancillary Expenses Approval/Denial” (NA 823) is used for the purposes of Family Services when approving Family Services payments such as At-Risk Youth Services and Family Stabilization Housing Assistance.

The NA 823 is not used for the purpose of FS denial; instead, the FSP 2 is issued.

The NA 823 is also used per existing Ancillary procedures. [Refer to “Ancillary Expenses,” page 28-1.]

11.13.15  SCD 2393

The “CalWORKs Housing Support Program (CHSP) Community Partner Referral” form (SCD 2393) is used by CalWORKs Community Partners and Employment Support Initiative (ESI) to refer eligible CalWORKs individuals to the CHSP.

11.14  CalWIN Case Comments

In addition to existing CalWIN Case Comment types, the following are used for the Family Services Program:

- “Assign Fam Stablztn EC Speclst”
  Used by designated FS Support to document housing referral assignments to FS EC Specialist.

- “Family Services Case Update”
  Used by FS EC Specialist and assigned EC to document FS case updates and action plans.