



Linkages

A. Overview:

“Linkages” is the program partnership between CalWORKs and Family & Children’s Services (FCS) due to common cases between departments. Linkages is a practice, not just a program. It enhances connections to agency and community services/resources that provide a network of support for the family.

B. Scheduling:

Linkages case meetings are scheduled by CalWORKs clerical unit and assigns the task and meeting to a CalWORKs Social Work Specialist (SWS) upon receiving the email from FCS department’s CFT meetings scheduling unit (CFTScheduler@sfgov.org). If CalWIN shows that no SWS is currently assigned to the case, clerical unit schedules the Linkages meeting with the next SWS on Linkages rotation who is available. CalWORKs clerical unit records and keeps track of the Linkages meeting dates for all SWSs on Linkages rotation to maintain fairness with caseload distribution. In the event that assigned SWS is out on the day of the Linkages meeting, the ADA/Duty Social Work Specialist of the day will be the attending SWS to the Linkages meeting. Clients’ primary languages also take precedence for task and meeting case assignment. For fairness, Linkages coordinator may request CalWORKs clerical unit for the attending ADA/Duty Social Work Specialist or the bilingual Social Work Specialist assigned to the Linkages meeting due to requested language needs be placed at the bottom of the Linkages rotation if the client attended the Linkages meeting. If the meeting is cancelled or client is a no-show, Linkages coordinator emails CalWORKs clerical unit to inform of this and to assign the same SWS to the rescheduled meeting if within 2 months provided that SWS is again available during the rescheduled meeting. SWS will keep the task open for 2 months during which time CalWORKs clerical unit will assign the rescheduled meeting to that same SWS if they are available. If client is not rescheduled within the 2 months, SWS closes the task and will return to Linkages rotation. During the 2 months, the subsequent Linkages meeting for a different case will be assigned by CalWORKs clerical unit to next SWS on rotation.

C. Linkages Meeting:

The SWS who attends the meeting will act as the CalWORKs representative and general contact person for the client, other CalWORKs staff, and assigned FCS department Protective Services Worker (PSW) assigned to the same Linkages case. If client attended the meeting, Linkages coordinator will email wtwcasetransfer@sfgov.org for the Welfare-to-Work case in CalWIN to be assigned to the same SWS. If a Family Stabilization Plan (FSP) was signed by client related to the Linkages case, SWS will be in charge of entering all relevant data into CalWIN including case comments, issuing transportation and other supportive services, and monitoring client’s engagement to meet the monthly terms of the FSP plan upon receiving monthly email confirmations from assigned FCS department PSW. In addition to CalWIN, assigned SWS will also enter in Launchpad.



1. STEP 1: PREPARE FOR THE LINKAGES MEETING

- a. Prepare for the meeting in order to better assist the client and address client's questions during the meeting.
- b. During the preparation, SWS should be able to determine whether the meeting is for a Family Maintenance (FM) Linkages case or a Family Reunification (FR) Linkages case (AB 429) which is also noted in the email thread when task and meeting were assigned to the SWS. If the child(ren) has/have been removed with no other eligible minors in parent's custody and is client does not have CalWORKs Pregnant Woman Only (PWO) status, client may be eligible for AB 429.
- c. Emails –
Print the email thread initially sent by the clerical unit when case was assigned to you as SWS attending the Linkages meeting as well as all emails regarding the Linkages case from the Linkages coordinator.
- d. CalWIN and MEDS –
 - Print Search on Case Information: Case Detail
 - If the case is assigned to an Employment Specialist (ES), consult with the ES as part of reviewing the case.
 - Print Search on Case Information: Programs
 - If any programs are discontinued, check for and print its *Discontinuance Reasons*
 - For WTW discontinuance, check *Maintain Employment Services Participation*
 - Print Search on Case Information: Case Members
 - Note the household composition, including:
 - number of children in and out of the home
 - number of parents (i.e., 1-parent household or 2-parent household)
 - Note special circumstances (e.g., fleeing felon, aged-out children)
 - ⊖ Review and print companion cases under client's name if applicable, especially if client has a current CAAP (a.k.a., "GA/General Assistance") benefits case in either approved/pending status. If so, inform the Linkages coordinator prior to the Linkages meeting. Also review client's CalFresh and Medi-Cal benefits status.
 - Print Display Eligibility Summary (print at least 5 months' worth of history)
 - Use *Individual Details* to check which benefits client is receiving currently and previously (e.g., CalWORKs, CalFresh, Medi-Cal).
 - Use *Initiate Wrap up* to check for special situations.
 - Print Display Individual Time Limit Clock Summary for the client
 - Print Search for Issuance (print at least 4 months' worth of history)
 - ⊖ This can determine whether the client has been receiving AB 429 funds. It will also provide information on client's current CalFresh benefits status.
 - Print Inquire on History Data from EBT for Cash and Food Stamps



- Use this to determine whether the client has been using their EBT benefits and the currently active EBT card number last 4 digits. If applicable, inform client during the Linkages meeting that they may need to request for a new EBT card which they can do so by calling the CalWORKs Service Center main phone line at (415)557-5100.
 - Print *Inquire on Medi-Cal Aid*
 - Make sure that you are checking the current month. Use this to determine client's Medi-Cal benefits status (e.g., Modified Adjusted Gross Income/MAGI Medi-Cal, non-MAGI Medi-Cal, etc.).
 - Print *Maintain Employment Services Participation for Registration, Plan, and Activity*
 - For Family Maintenance (FM) Linkages cases only, note the following:
 - the last date of OCAT Appraisal
 - if client has a current Employment Specialist (ES) assigned to their case in CalWIN
 - if client has a current active Welfare-to-Work plan and activity
 - if client is currently exempt or exempt-volunteer (If there is a Long Term Disability Exemption, check iFiles for an OCR 2 or print one for the client to sign during the Linkages meeting.)
 - Print *Display Sanctions and Penalties* for the current month and one previous month
 - Print any *Case Comments* that may be relevant
 - Print from MEDS system *Income and Payment Information* showing line *SSI-Paid-Amt* after entering option *QX* to check if client is receiving SSI/SSDI disability benefits. The line *SSI-Paid-Amt* should be either empty or \$0.00 which means client should not be receiving SSI/SSDI disability benefits in order to be eligible for the Linkages program. Notify the Linkages coordinator if you find otherwise. The Linkages coordinator verifies this even before emailing the FCS department PSW to schedule the Linkages meeting with the client, albeit the client may start receiving SSI/SSDI disability benefits sometime before the Linkages meeting is held.
- e. Forms –
- Partially complete the main Family Stabilization plan (FSP-7070 form) and the Family Stabilization Program Evaluation Request (FSP-1 form).
 - For FCS activities that CalWORKs generally does not monitor, the objective will most commonly be *FS - Case Management Services*.
 - Provider should be “*Family and Children’s Services (FCS) and their agency’s providers relevant to client’s FCS Linkages case plan.*”
 - Description of Service should be “*Linkages program.*”
 - Duration of *FS - Case Management Services* activity can be up to 6 months for AB 429 clients or less as recommended by the Linkages coordinator. Indicate specific dates with start and end dates.
 - Frequency of Contact by Social Work Specialist should be “monthly.”



- Hours Per Week should be “20 or more.”
- Location should be “170 Otis St. San Francisco, CA.”
- Phone# should be your own work phone number.
- Mark off all boxes on pages 1-2 relevant to Linkages case.
- For Family Reunification (FR) AB 429 Linkages cases, on page 2 under Supportive Services section, mark off only the box corresponding to Transportation that can be offered to client who attends the Linkages meeting as a bus pass. Mark off both child care and ancillary supportive services boxes as “do not need at this time.”
 - For Family Maintenance (FM) Linkages cases, leave all page 2 Supportive Services section boxes blank as client’s responses will depend on the outcome of the Linkages meeting.
- Mark off all boxes on page 3.
- Highlight where client needs to sign on page 3 which is under “Participant’s Signature” so you are ready during the Linkages meeting.
- Partially complete a Family Stabilization Program Evaluation Request (FSP-1 form) with “Family and Children’s Services (FCS) case-AB 429 Family Reunification services” indicated under the crisis that client needs help with.
- For Family Maintenance (FM) Linkages cases only, prepare the following other blank forms in case you will need them during the Linkages meeting:
 - CW 61 form (Authorization to Release Medical Information)
 - CW 2186A (CalWORKs Exemption Request form)
 - CW 51 form (Child Support - Good Cause Claim for Noncooperation) which is usually relevant if client discloses that they are a domestic violence survivor

2. STEP 2: ATTEND THE LINKAGES MEETING

- a. During the meeting, if the FCS Protective Services Worker (PSW) or the client discloses information that may affect CalWORKs eligibility, the case may need further review. For those instances, SWS may opt to not provide information and/or make major decisions during or immediately after the meeting. If so, inform client and PSW of additional review needed and SWS will update both as soon as the determination is made.
- b. For Family Maintenance (FM) Linkages case:

If the client would like to participate in CalWORKs Welfare-to-Work activity and if last OCAT Appraisal date has been more than 6 months or has not had one, SWS will schedule OCAT Appraisal with client or will contact client post-Linkages meeting to schedule.

 - b.1 If client has an assigned CalWORKs Employment Specialist for WTW:
 - During the meeting, SWS will answer client’s questions, but will mostly refer client back to their assigned CalWORKs Employment Specialist if further action is required. In terms of referrals, SWS will follow as outlined below.



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- If OCAT Appraisal is required as abovementioned, SWS will schedule OCAT Appraisal with client or will contact client post-Linkages meeting to schedule.
 - If client needs referrals to Housing Support program (HSP), SSI Advocacy, Smart Money coaching, and Bay Area Legal Aid, SWS will process the referrals post-Linkages meeting.
 - If client needs a Family Stabilization plan and/or needs referrals to RAMS mental health and La Casa for domestic violence services, SWS will refer client back to their assigned CalWORKs Employment Specialist.
- b.2 If client does not have an assigned CalWORKs Employment Specialist for WTW:
- SWS will be the contact person for the client. After the meeting, Linkages coordinator will email wtwcase@sf.gov for the Welfare-to-Work case in CalWIN to be assigned to SWS.
 - If the client qualifies and would like to be either fully exempt from participating in Welfare-to-Work or have exempt-volunteer status, SWS will ask client to sign CW 61 form as abovementioned under C.Step 1.e. Forms section.
 - If the client is eligible for Family Stabilization (FSP) and client agrees to FSP, SWS will ask client to sign FSP-7070 and FSP-1 forms.
 - Coordinate with the FCS PSW for the supportive services of transportation and childcare. Generally, SWS can offer childcare supportive services that client is eligible for provided that the client agrees to a CalWORKs Welfare-to-Work activity and/or signs Welfare-to-Work forms (e.g., WTW2 or FSP-7070 with FSP-1). Furthermore and if client decides to participate in Welfare-to-Work activity, SWS can inform client of next appropriate appointment meeting with SWS (OCAT Appraisal or Assessment).
- c. For Family Reunification (FR) Linkages case (AB 429):
- For AB 429, client must be present during the first Linkages meeting scheduled by PSW after PSW receives emailed CFT Linkages meeting scheduling instructions from Linkages coordinator. Linkages coordinator verifies client's eligibility for Linkages and AB 429 benefits prior to emailing PSW the instructions to schedule the Linkages meeting with client.
 - Linkages coordinator or SWS if attending solely informs client and other Linkages meeting attendees the terms required for client to receive AB 429 benefits and how AB 429 benefits are disbursed, such as the following:
 - cash deposit into client's EBT card starting the 5th of the following month for up to 12 months depending on client's being engaged with their FCS Family Reunification case plan as well as meeting other conditions (i.e., Client is not in any of the following circumstances: permanently residing outside San Francisco, becomes eligible for CalWORKs either via reunification with child/ren or CalWORKs Pregnant Woman Only/PWO status, receiving CAAP benefits or has pending CAAP application, period of incarceration/hospitalization/psychiatric institutionalization of at least 1 month or more).



*Note: For 2-parent household cases where separated parents are both eligible for AB 429 benefits, the secondary parent on the previous CalWORKs case can only receive AB 429 benefits via monthly checks that client can pick up at 170 Otis distribution location. Linkages coordinator will provide instructions to assigned SWS in these situations.

- client maintains San Francisco official residency throughout
- client attends required 2 subsequent AB429 Linkages review meetings also scheduled by the FCS Protective Services Worker (PSW) after receiving scheduling email from Linkages coordinator:
 - the 1st review meeting during the 6th month mark for renewal of client's FSP plan
 - the 2nd review meeting during the 12th month with AB 429 benefits discontinuance afterwards or the last month that client is receiving AB 429 benefits if reunified with child/ren or otherwise becomes eligible for CalWORKs (e.g., CalWORKs Pregnant Woman Only/PWO status)
- AB 429 cash benefits are issued to clients' EBT cards by 5th of the month (or another date during the 1st month as informed by Linkages coordinator) processed by designated CalWORKs Eligibility Supervisor after receiving the AB 429 payment list emailed by Linkages coordinator, plus verifying other eligibility criteria (e.g., client currently not receiving CAAP benefits or has a pending CAAP application as abovementioned in earlier section). Client is eligible for up to 12 months if has not reunified with child/ren or has a CalWORKs Pregnant Woman Only (PWO) status prior because then client would be eligible instead for CalWORKs benefits.
- SWS offers client during the meeting the Family Stabilization plan/FSP for a duration of 6 months for transportation in the form of monthly bus passes. SWS should explain the duration of the 1st FSP plan as 6 months, then the 2nd FSP plan to be offered during the subsequent 1st review meeting or if client agrees to meet with SWS separately before the end of the 6th month. If client agrees to the terms and provides their email address, SWS can email client the FSP forms FSP-7070 and FSP-1 to which client can respond acceptance of both forms. Client can also meet with SWS or receive the forms via mail if does not have an email address.
- SWS also offers client referral(s) to the following supportive services and will process those that client would like to be referred to: provide client with Jobs NOW hotline phone# 1-877-562-1669 with no further action or refer client to internal SSI Advocacy program if client has permanent disabling conditions with inability to work (i.e., cannot be both and only either), Smart Money coaching referral, RAMS mental health referral, La Casa domestic violence services referral, and Bay Area Legal Aid referral.



3. STEP 3: POST-MEETING CASE MAINTENANCE AND SUPPORT

a. For Family Maintenance (FM) Linkages case:

- If a CalWORKs Employment Specialist is assigned to the WTW case in CalWIN, SWS remains assigned to the Linkages case until all the terms listed by the FCS Linkages meeting facilitator that SWS committed to do under the CalWORKs Staff Responsibilities section of the Linkages Shared Family Care Plan (Form 1163) signed by client, SWS, and PSW who attended the Linkages meeting are all completed by the SWS. This includes any post-Linkages meetings the client agreed to or is required to meet with the SWS as appropriate, such as for OCAT Appraisal or Assessment.

*Note: If a future Linkages meeting is scheduled on the same case still under Family Maintenance (FM) status, Linkages coordinator can, on a case-by-case basis, inform CalWORKs clerical unit that Linkages meeting has to be assigned to the previous SWS who attended the last Linkages meeting if said SWS is available.

- If there is no CalWORKs Employment Specialist assigned to the WTW case in CalWIN, after the Linkages meeting attended by the client, Linkages coordinator emails wtwcasetransfer@sfgov.org to request transfer of Welfare-to-Work case to the SWS who attended the meeting if not yet assigned in CalWIN.
- SWS completes CalWIN data entries consisting of case comments and if applicable, appropriate plan and activity entries under the CalWIN Employment Services subsystem. SWS should also complete i-Task and Launchpad data entries.

b. For AB 429 Family Reunification (FR) Linkages case:

- If client attended the 1st Linkages meeting and Linkages coordinator emails wtwcasetransfer@sfgov.org to request transfer of Welfare-to-Work case to the SWS who attended the meeting, SWS is required to monitor and support the client until Linkages case is closed which can be up to 12 months as the last month client may receive AB 429 benefits.
- If client signed or emailed back agreement to the 6-month 1st FSP plan (FSP-7070 and FSP-1) for transportation, SWS processes the plan accordingly.
- SWS completes entries into CalWIN, i-Task, and Launchpad. CalWIN case comments should start with "AB 429:"

Below are the steps to enter the FSP plan with activity under the CalWIN Employment Services subsystem and to check monthly issuance of AB 429 benefits.

- *Display Case Employment Services Participation:* Select the "Welfare-to-Work" line.
- *Maintain Employment Services Participation:*
 - Under Registration tab, add and select Program as "Post-Aid Services" with begin date the start date of FSP plan. Select Participation as "Mandatory." Select Targeted Group as "AB429 Family Reunification."
 - Under Plan tab, Plan Type should be "Family Stabilization." Enter other required information as you would when entering any Family Stabilization plan following above earlier chapter.
 - Under Activity tab, select Activity Type "FS-Case Management Services." Hours should be 20 weekly hours or can be more as discussed during the Linkages meeting. Enter



other required information as you would when entering any Family Stabilization plan activity following above earlier chapter.

- *Display Individual Time Limit Clock Summary:* Check to make sure CalWORKs 48 Month Clock line (i.e., bottom line corresponding to FSP plan start date month) is Non-Ticking.
- *Maintain Employment Services Participation:* Linkages coordinator is in charge of sending the email reminders for the required monthly status updates to all PSWs holding AB 429 cases with assigned SWSs copied on these emails. Once SWS receives the PSW's email response that client remains engaged in their Family Reunification (FR) case plan, enter under FSP plan FS-Case Management Services activity client's total attendance hours for the month and update the Maintain Status tab. If you don't receive PSW's emailed monthly status update by end of the month, check with Linkages coordinator or email the PSW directly (with Linkages coordinator cc'd on your email).
- *Search for Issuance:* Check monthly to make sure client received the AB 429 cash aid benefit no later than 5th of the month (or if the 5th falls on a non-workday, will be the workday immediately following) as a Supplemental Payment to the client's EBT card. If the AB 429 Supplemental Payment was not issued by then, email to check with the Linkages coordinator with supervisor cc'd.

4. STEP 4: CASE CLOSURE

a. For Family Maintenance (FM) Linkages case:

After completing required entries in CalWIN, i-Task, and Launchpad, if SWS has been assigned to WTW case in CalWIN, SWS will email supervisor to request transfer of Welfare-to-Work case to next CalWORKs Employment Specialist (ES) on rotation.

b. For Family Reunification (FR) Linkages case (AB 429):

- If client reunifies with child/ren or has a CalWORKs Pregnant Woman Only/PWO status before 12 months of AB 429 benefits ends, SWS will do the following:
 - SWS will recommend to client to reapply for CalWORKs with benefits to possibly start the month after reunification or verified CalWORKs Pregnant Woman Only/PWO status.
 - SWS will also email to inform the Linkages coordinator who may email the FCS Protective Services Worker (PSW) of further requirements that the PSW has to process, such as ensuring closure of Foster Care case(s) in CalWIN.
 - SWS will email supervisor with Linkages coordinator cc'd for Welfare-to-Work case closure after the Linkages coordinator emails to confirm SWS can already close the AB 429 case. The next SWS who will most likely be assigned to the CalWORKs pending/active case after client reapplies for CalWORKs will be the SWS who conducts the OCAT Appraisal with the client.
 - SWS completes entries into CalWIN, i-Task, and Launchpad. CalWIN case comments should start with "AB 429:"



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- If client does not reunify and is also not a CalWORKs Pregnant Woman Only (PWO) case, by the end of the 12th month when client has already exhausted AB 429 benefits, SWS will do the following:
 - SWS will email supervisor with Linkages coordinator cc'd to request Welfare-to-Work case closure no earlier than the last day of the 12th month or if Linkages coordinator emails that SWS can already close the AB 429 case on a specific date.
 - SWS will ensure the active FSP plan attached to the Linkages case is also closed in CalWIN.
 - If client continues to reside in San Francisco, SWS can recommend to client to apply for CAAP benefits (a.k.a., "GA"/General Assistance) by calling (415)558-2227.
 - SWS completes entries into CalWIN, i-Task, and Launchpad. CalWIN case comments should start with "AB 429:"