

## Processing Applications at Intake

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## I. Summary

**This Handbook has been revised to:**

- Separate the Intake process from the Re-determination process.
- Update the Intake Process for Phase II.

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## II. General

Intake applications – General Assistance (GA) regulations require that applications must be processed within 30 days from the date of application (unless allowed an extension).

Intake application allowed an extension – must be processed within 45 days of the date received.

- Applicant households must verify their identity, assets, income, and need for benefits.
- Applicant households must provide a Housing Assistance Vendor Agreement Form (90-9) with a verified housing cost if they wish to have a vendor payment made to a landlord.
- Applicant households may need to verify additional information, based on the applicant’s reported information on the Application for General Assistance, or other information known to the Agency.
- Applicant households will not be authorized initial or continuing aid, until all points of eligibility are established, with the following exception: Intake applicants may be temporarily authorized aid under Presumptive Eligibility, pending a complete determination of eligibility. Refer to Presumptive Eligibility, 90-01.61.

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**Note:** It is important that we inform and offer General Assistance clients all other programs for which they may be eligible, such as CalFresh and Medi-Cal. For instructions on how to process applications for CalFresh and Medi-Cal, refer to CalFresh Handbook 63-03.05 and Medi-Cal Handbook: 80-9.1 Determining Eligibility Under the Affordable Care Act of 2010.

In addition to offering CalFresh, a food assistance referral may also be offered for all clients in need of food assistance. Please refer to Client Referral Guide IV. Programs: Food and Generic Processes Newsletter: 15- 05 Emergency Food Assistance Referrals. Please note that emergency food assistance referrals may be made directly to food distribution sites by completing the Form 56-6 Emergency Food Referral.

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### III. Specifics

#### A. Intake

**Note:** Refer to Procedure [90-01.70](#) for required documentation.

#### 1. All applicant households must attend a Social Worker assessment

**The Social Worker shall:**

- Complete an evaluation of applicant employability, shelter needs, a Mental Health Screening, and referral for SSI advocacy, as applicable.
- For complete instructions on conducting the SW interview refer to General Processes Handbook 50-00.3.

#### 2. A face-to-face interview is required for all Intake applications. For cases that have active CalFresh or Medi-Cal the worker has the option of either conducting a face-to-face or telephone interview.

**The Eligibility Services Technician (EST) shall:**

- Receive an email with an Interview Case Action from the Work Distribution Tool (WDT). For complete instructions on the interview process refer to General Processes Handbook 50-00.3
- Review Form 90-16, Application for General Assistance, with the applicant(s), and will provide one of the Rights and Responsibilities pages to the applicant(s).

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- Have the applicant(s) complete and sign the SSP 14, Authorization for Reimbursement of Interim Assistance. Both individuals in a couple case must complete an individual copy.
- Provide a needs letter (CW 2200) for all necessary documentation required to complete the application process. The due date for this documentation is to be within 10 calendar days of the date of the needs letter. The EST will create a WDT Need Letter Case action with a 10-day due date.
- Complete the required face-to-face interview with the client.
  - If a CalFresh SAR 7 or RRR is due the same month the GA RRR interview is conducted, the EST shall conduct the RRR interview for all applicable programs and process the CalFresh SAR 7 or recertification when processing the GA RRR. Refer to CalFresh Handbook: 63- 03.05 Application Process.
  - If the Medi-Cal RRR is also due within 90 days or if a Medi-Cal discontinuance took place in the last 90 days and has not yet been processed, complete the Medi-Cal RRR using the GA information along with the GA RRR. Refer to Medi-Cal Handbook 80-9.42 Modified Adjusted Gross Income (MAGI) Medi-Cal Annual Redetermination Process.
  - If the client is not currently enrolled in CalFresh or Medi-Cal and may be eligible, provide information about these programs and how to apply. A food assistance referral may also be offered. Refer to Client Referral Guide IV. Programs: Food and Generic Processes Newsletter: 15-05 Emergency Food Assistance Referrals.

### Missed Interviews

- If the applicant misses the interview that has been scheduled in CalWIN, CalWIN will hold the case pending for 10 days and if the interview has not been completed, CalWIN will deny the application in a nightly batch and automatically send the denial notice.
- If the GA application was already denied due to missed interview and the client reschedules and completes the interview within 30 day timeframe, process the application as a rescind.

### 3. When all documentation is received and other eligibility requirements are completed, within 30 days, the EST shall:

Determine if the applicant is eligible

- If eligibility is established, approve aid from the date of application. The EST will need to determine the applicable Standard of Need, and the payable grant amount for the applicant household.
  - All eligible applicant households will receive a maximum grant of up to \$336 for a single person or \$548 for a couple. {refer to GA Handbook 90-02.00}
  - Households whose housing costs exceed applicable grant levels are only entitled to receive up to the maximum GA grant. Do not vendor any amount greater than the standard of need.

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- Send all required notices to the applicant household.
  - Referrals for Fleeing Felons, Incarceration and Parole/Probation Violation investigations should be submitted at Intake, Renewal/Redetermination/Recertification (RRR), Add-a-Program, and Add-a Person only in the following instances: the client self-identifies, EST receives an automated match, or notification from law enforcement agencies {refer to **Generic Process Newsletter 15-10**}.
- **If eligibility is not established**, deny the case and send all required notices to the applicant household.
- 4. Applicant households are required to cooperate with any necessary SIU investigation:**
- If there is questionable information that can't be addressed with any available documentation, the EST should refer the issue to PID/SIU for investigation.
  - If the application can't be processed within 30 days, the applicant household must waive the 30-day processing requirement. If the applicant refuses, the application will be denied for non-cooperation with SIU. Do not impose a sanction for a denial due to non-cooperation in this situation. See #6 below.
  - When SIU completes their investigation, they will make recommendation of the action to be taken on the application. SIU does not make eligibility determinations. The EST will be responsible for evaluating the recommendation from SIU and making a determination of eligibility.
- 5. If documentation is not provided by due date:**
- If the applicant household has not provided the requested information, **and has had no further contact** with the Agency, the application will be denied for failure to complete the application process.
  - If the GA application was already denied due to failure to provide and the client submits all required verifications within 30 days from the date of application, process the application as a rescind.
  - If the applicant household has made contact to request either assistance with obtaining the necessary documentation, or additional time to provide the information, evaluate the need to extend the application period. See #6 below.
- 6. If the application cannot be processed by the 30th day after the application date, but the applicant is complying or attempting to comply**
- An application may be extended beyond the 30 day limit in the following circumstances, but these circumstances will not result in Presumptive Eligibility:
  - The applicant household contacts the EST indicating they need assistance, or additional time, to provide the necessary documentation.
  - The processing delay is due to circumstances beyond the County's control.

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7. **If the applicant household has complied with all program requirements within the 30-day timeframe, and a delay in processing occurs which is due to events within the County's control:**
  - The application is to be approved on Presumptive Eligibility (see regulation 9-1-6.1). **Refer to Handbook 90-01.61, Presumptive Eligibility.**
8. **Enter case comments documenting that the application was processed.**
  - This includes the effective date of eligibility and all other pertinent points of eligibility.

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## IV. References

9-1-2, 9-1-4, 9-1-5, 9-1-7, 9-1-8, 9-3-0

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### **Prepared By:**

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