

## PERFORMANCE MEASUREMENT COUNTIES

Advisory Meeting

August 9, 2000

DSS Training Center

815 "S" Street, Eureka Room

Sacramento, California

### SUMMARY

1. Welcome-Joeana Carpenter welcomed all the PMC supervisors to the August meeting. Attendees were: Jubert, M.; Rios, H.; Neely, P.; Sarceda, V.; Barron, C.; Dershewitz, g.; Johnson, J.; Epps, E.; Baca, J.; Criswell, D.; Hamilton, H.; Greer, G.; Rockdashil, C.; Roca, R.; Monson, N.; Broderick, T.; Casey, G.; Gutierrez, A.; Morgan, R.; Wilmer, J.; Wilmer, R.; Morrison, J.; Lerner, B.; Ghens, W.; Trujillo, R.; Carpenter, J.; Hernandez, H.
2. Agenda Review-Joeana Carpenter reviewed agenda items. Daphne requested a new item to be added.
3. Summary Review-Joeana Carpenter reviewed summary to the June meeting. A couple of typos were identified. Hector to correct summary.
4. CalWORKs Report and Questions-Warren Ghens stated that one of his goals was to try to review to the same standard and have everyone do the same. Warren introduced a new approach to reviewing cases to the "authorized to" rather than actual. This approach is more in line with how the TANF program has changed. He indicated that this approach should be implemented immediately. The PMC supervisors had Class 600 question. Hopie Rios had submitted questions to Warren prior to the meeting. Warren provided everyone a hand out on the responses. One issue was that if a C.E. case exists, the reviewer will review the class 600 as if C.E. was not present. If the resources limit cannot be verified, the reviewer will accept it as OK in class 600.
5. Food Stamps Report and Questions-Michael Bowman-Jones passed out a transmittal on C.E. Mike reported that he will put all questions he makes to Program in writing and then share with PMC counties. Mike indicated that the Question and Answer product he has developed has been forwarded to Richard Trujillo. Richard will get this product on the Taskforce web. Mike also provided a summary of the Documentation Workgroup findings. Hopie Rios also shared her comments on the work of the group and Mike shared a draft product of findings and recommendations. Ron Morgan made a presentation on a meeting he attended in San Francisco with FNS along with Joeana, Richard and Hector. At the meeting, Ron reported that the FNS staff was given a Q5 presentation and a good exchange of issues and questions were discussed. One of the concerns FNS expressed was the lack of documentation clarifying the unusual situations that occurred in case reviews. Ron stated that he assured FNS that the FNS 310 was the official guide for staff on how to review cases. Once they understood how Q5 worked they better understood our product and had decided to consider using Q5 in their review process.
6. Field Operations Report-Ron Morgan provided the report. Ron indicated that FOB had received information that FNS was in the process of reviewing negative case reviews (completed by state FOB staff ) and that a new emphasis on this type of case was being initiated. Ron indicated that a possible impact on the PMC counties may be the request of the negative cases by FNS staff in the future. Ron will update at next month's meeting.
7. Data Builders Presentation-Jay Wilmer and Richard Wilmer provided an update on the status of the Q5I rollout. Hector Hernandez shared the results of the Q5I pre-installation survey he had received from the counties. About 9 counties had equipment that would not work with the new application and working with the PMC supervisor in each of the impacted counties attempts were being made to obtain the appropriate equipment. Richard Trujillo provided an update on the beta

testing his staff was involved in. Once, testing of the first version of the application is completed by his staff, a roll out to the counties would begin. The goal of the initial beta testing is to eliminate most of the minor problems of the application. Richard will contact counties as soon as the application testing goes to the next level of testing.

8. PMC Meeting Format-Joana Carpenter reported on the voting results on how the meeting format of the PMC and County Regional meetings. She reported that the voting majority had opted to change their regional meetings to the day before the PMC meeting. This would allow for the attendance of state staff when required. Gerry Greer had previously volunteered the Sacramento County facilities for the regional meetings and he passed out maps and directions to the meeting location. Each Regional County group will arrange their agendas and notify the appropriate Taskforce manager when state staff is needed to attend. DUE TO THE TWO DAY FORMAT OF FUTURE REGIONAL/PMC MEETINGS IT WAS DECIDED TO BEGIN THE PMC MEETING ON DAY TWO AT 9:00 A.M.
9. County by County WTW30 Results-Tom Broderick had requested this information at the June meeting and Joana Carpenter provided a report to the PMC supervisors. Joana stated she had met with Lynne Yoshimura and at the meeting Lynne reported that some of the WTW30 data reported was not correct and that the counties had been informed of the problems with the data. Counties are now in the process of revising the data and submitting it again. Some of the revised data is in an Lynne's staff are reviewing the data for accuracy and consistency. Once the data is correct and consistent, the results will be put on the web.
10. County Fiscal Claiming-Lilia Angiano from County Fiscal attended the meeting to provide the PMC supervisors an update on how certain costs can be claimed by the counties. Lilia shared a transmittal with instructions on claiming for county QC related activities. Lilia stated that PMC supervisors should call (916) 657-3806 to ask for information on the analyst that has been assigned to their county for any further assistance.
11. Corrective Action Report-Jerri Morrison provided the report. Jerri shared the most recent rolling error rate report. In addition, Jerri also shared a copy of the 3 year error report showing the errors identified. She stated that if anyone had any questions to call her or Chris Waters.
12. Reports Workgroup-Daphne Criswell reported on her workgroup's activities. She shared the first batch of reports for consideration by the PMC supervisors. She reviewed the reports and handed out copies. She asked all the PMC supervisors to review the package, prioritize the reports and contact her with input as soon as possible. Information due August 15, 2000.
13. Email report-Richard Trujillo reported that at times our email users group is not the best way to ask and resolve questions. He stated that a new procedure is being implemented to reduce the confusion. Each issue will be identified under the heading SITUATION then another heading of QUESTION, followed by the heading RESPONSE. Effective immediately, any program question should be sent to Mike (FAX 909-862-8156) or Warren (Warren.Ghens@dss.ca.gov) directly on email rather than the Q5 users group. Issues concerning edits can be emailed to Richard ([Richard.Trujillo@dss.ca.gov](mailto:Richard.Trujillo@dss.ca.gov)) or Marlene (Marlene.Fleming@dss.ca.gov) They will research the issue and then provide the RESPONSE along with the SITUATION and QUESTION on the users group email for everyone to read. Richard handed out a transmittal outlining the new procedures
14. Availability of TANF Data Elements-Bruce Lerner provided a questionnaire on TANF data items not on SAWS 1, 2 or 7. He asked that the completed questionnaires be returned to him no later than August 31, 2000. He stated that the results will be used to modify the SAWS form at the county intake level. He reminded everyone of the importance of this survey because the data we collect helps meet California's reporting requirements.

15. Phoenix Conference-Joeana reported on her attendance at the recent conference. She attended the various forums and saw how our data is used. Joeana reminded everyone that we need to make sure that whatever data we collect has to be as accurate as possible because we don't know who will later use it. Joeana reminded everyone of how important our jobs are in ensuring that the data we collect is accurate and that all of us need to remind the staff collecting the data of how important their work is for California. Provided copies of handouts from the Congressional Research Team reflecting use of the TANF data.
16. FNS case reviews-Joeana and Hector reported on a meeting with Lisa Kim on getting cases and Q5 folders to FNS timely. Hector reported that he had agreed to have his unit be a central point for case request status. FNS will notify Hector's unit of all cases selected for FNS review. His staff will monitor when the request is made and when the cases are sent to FNS. FNS also requested that both the Income Maintenance Folder and Q5 folder with attachments is sent at the same time. In the case of Los Angeles County, the L.A. FOB office will now send both the Q5 and Q5 attachments to FNS. Counties requested that Joeana and Hector request FNS to return cases sooner because they need the Income Maintenance folders. Joeana and Hector agreed to make the request at the next meeting with Lisa Kim. Hector will write a letter outlining the revised procedures and release to all the PMC supervisors.
17. Next PMC Meeting-September 13, 2000 at the Training Center; 815 "S" Street; Sacramento.