

P-2350 Case Management Procedures for Households with 60 or More Countable Months/Time limits (continued)

P-2350A Closures (24-20)

Engaging with Reach Up Services requirements

If a person who receives Reach Up and who has received 60 or more countable months of Reach Up does not engage in the Reach Up program, their benefit could close. A conciliation should be used first. Review Reach Up Services procedures [2345 Good Cause](#) and [2346 Conciliation](#).

If the participant is struggling to attend meetings, make sure to offer options that accommodate different meeting preferences (such as over the phone, home or community visits, specific times of day). Closure should only be considered if a person receiving Reach Up has shown a pattern of non-engagement, and the conciliation was not successful.

Closure during the goal achievement process

Consider if a goal needs to be adjusted or changed, or if a different plan needs to be considered before moving toward closure (see Reach Up Services [procedure 2310](#) on goal achievement).

It is important to remember that a participant could be in the review phase of Goal Plan Do Review and Revise (GPDRR) for a long time. As long as the participant is revising their goal or the steps of their plan, closure is not needed.

Consider the following and make sure to document the participant's progress in case notes:

- Have you used the review and revise portion of the GPDRR process, utilizing multiple tools when appropriate, to make sure the goal and plan is still what the participant wants to focus on?
- Have you revisited Stepping Stones ([Stepping Stones to Success](#)- ESD internal link only) to see if something else is rising to a higher level of priority?
- Have you offered support services to help remove barriers that might get in the way of accomplishing the goal or plan?
- Have you considered underlying reasons (mental health issues, domestic violence, etc) for the participant's lack of progress?
- After all of these efforts, is the participant still choosing to not set/change their goal or change their plan, but they continue to not take part in the do part of GPDRR?

Determining if closure is necessary during the goal achievement process is very subjective. Consult with the Reach Up Supervisor when unsure.

Closure Authorization

Complete a Closure Authorization ([form 606CBA](#)) and include the following:

- Specific information about the non-engagement;
- Explanation about why the closure will be implemented; and
- Rule cite(s) relied on to make this determination.

Give the completed Closure Authorization ([606CBA](#)) to the Reach Up Supervisor, or their designee, for review.

Review by Supervisor

The Reach Up Supervisor, or their designee, will determine:

- What were the participant's circumstances?
- Were multiple methods of communication attempted, was the goal achievement process used to determine the participant's goal(s)?
- Was good cause explored?
- Is the paperwork complete?
- Were Reach Up Eligibility rule 2234.1 and Reach Up Services rule 2327 followed?

The closure will be approved or reversed at this time.

Closure reversed

If the Supervisor decides to reverse the closure, it is recorded in the case file and e-mailed or discussed with the case manager or career coach.

Closure approved

If the Supervisor agrees with the decision and the closure is approved, they will sign off on the Closure Authorization ([606CBA](#)) on the district director/designee line. A copy of the signed 606CBA should be kept in the case management file and a copy should be scanned to OnBase.

Participant re-engages before closure date

If a participant closes for non-engagement of participation in Reach Up Services, they may re-open before their closure date if they have re-engaged with their Reach Up Case Manager/Career Coach (RUCM/CC) prior to closure. The RUCM/CC should notify the District Management Team that the participant has re-engaged and that the participant can be re-opened.

If the participant attempts to re-engage by contacting their RUCM/CC prior to the closure date, but the RUCM/CC is not able to accommodate a meeting time before closure date then the RUCM/CC should schedule a meeting as soon as

administratively possible and recommend to the participant that they will need to complete a new [202](#) application to re-apply.

If the participant attends that appointment scheduled and engages then the RUCM/CC should notify the District Management Team that the benefits can re-open and no new application process is needed. If the engagement happens after the closure date due to the RUCM/CC not being able to schedule before the closure date passed, benefits can be backdated and approved so there is no break in benefits.

Example: John Doe is closing 9/30/2024 for non-engagement in Reach Up Services with his Reach Up Case Manager. John Doe meets with his Reach Up Case Manager on 9/20/2024 and creates a Family Development and schedules a follow up appointment with Reach up Case Manager. John has re-engaged with his Reach up Case Manager. Reach Up Case Manager can notify the District Management Team and John's Reach Up can be re-opened and a new application is not needed.

Participant does not re-engage before closure date

If a participant closes for non-engagement of participation in Reach Up Services and the closure date has passed without re-engagement then the participant will need to complete a new [202](#) application, complete an interview, and provide all other forms of verification to determine benefit eligibility. The participant would not need to meet with their Reach Up Case Manager/Career Coach (CM/CC) before benefits can be granted as they have closed and are now considered a new applicant.

If the participant completed a new 202 application, completed interview, and provided all other verification for eligibility determination prior to the closure date, but did not meet with their Reach Up CM/CC to re-engage in services then the application can be approved, but the benefit start date would be after the closure date.

Example: John Doe is closing 9/30/2024 for non-engagement in Reach Up Services with his Reach Up Case Manager. John completed a new Reach Up application to apply for Reach Up and hands in on 9/20/2024. John **HAS NOT** had any contact with his Reach Up Case Manager or re-engaged in Reach Up Services. John's application will not be able to be APPLed until 10/1/2024 and John will need to complete an interview and provide all other relevant verification/documentation for program eligibility determination. If all information is in prior to 10/1/2024 the case can be approved, but start would be 10/1/2024.

Entering closure in ACCESS

Go to WORK C under the parent who is not engaging.

```
01/08/21 10:49          *** FAMILY DEVELOPMENT PLAN ***          ASQWCF1
Participant:          SSN:          Financial Status: Active
Phone#:          Phase: WR 11/01/2020
E&T Duals: N          Participation Code: 34 XW
Date FDP Signed: 11 13 2020          Review Date: 04 30 2021
Employment Goal: 42-6011 00 Job Assistant.
Case Manager: PTH (          FSM          Activity          Matrix
Location: PATH /          History          History
*****
Strengths/Supports: Shelter/Transportation          Click &
Interferes:          Comment

Job Search/          Education/          Work          Other          Life Skills
Readiness          Training          Placements          Activities          Skills

Activity Hrs/Wk Start Target Act End date Outcome
Personal Health Counseling          P
          P

USER: 94 FNX: WORK MODE: C RPTGRP:          TRIOD: 01 21 COMMAND:
DO: Z IMS:          REPORTING GROUP:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Quit Retrn Exit Print Goal Hours PgBk PgFd CMH St/Sp Intrl C&C
```

Enter code 85 in the Participation Code field and hit ENTER.

```
07/13/23 08:30          *** FAMILY DEVELOPMENT PLAN ***          j
-----Reach Up Participation Codes Help-----
Code          Description          ASHWRCHP          Type
46 - Primary Caregiver for child >12 mos. but <24 mos.          XW
54 - Unable to work due to domestic violence          XW
55 - Able to work part time (Medical)          MW
56 - Able to work part time          MW
57 - Able to work part time (domestic violence)          MW
66 - Excluded member, or obviously ineligible person
85 - 60 mo, RU Services not engaged          TL
99 - Follow-up receiving support services          SS
```

Code 85 is used to close a case for not engaging in Reach Up Services. Can only be entered for cases with at least 60 countable months.

Check CASE D TIME to see if the case closed. If it didn't, ask a Supervisor or BPS to turn the case around using STAT C TRANS. If the case is still not closed, check ELIG C RUFA. It may need to be approved (a closure notice will automatically be created).

Write a CATN with:

- Name of participant who did not comply
- Name of supervisor who approved closure
- Reason for closure

After entering "T" and hitting ENTER, ACCESS will prompt you to choose a 60 month code.

```

04/30/14 17:33          *** CASE SANCTIONS SCREEN ***          (ASPEBH)
BPS:  GS1 / SDO FINANCIAL          DT LST MOD: 04 09 2014
FSCM:          MOD BY: 338

      SSN:          NAME:

SANCTION START  -----MEETING WITH CASE MANAGER-----  SANCTION END  FORFEIT
RSN ---DATE---  SCHED DATE  TIME  HELD DATE  WAIVER  RSN ---DATE---  RU ?
  7  01 01 2014  04 02 2014  09 00  04 09 2014  -      T  04 30 2014  -
                    (hh mm)

-----UNFORGIVEN SANCTION HISTORY-----
---- CURRENT +-----+-----+ FULL ACT
HOUSING | | | AMT AMT
(ALREADY FC | | | 225 225
SANCT | You have entered 'D' or 'T' for the end reason. | 225 225
MONTHS O | Here is the current Reach Up Participation code. | 225 225
CONSECUTIVE | Please update it with the appropriate participation | 150 150
TOTAL M | code if appropriate. Use SHIFT F12 for CODE LIST. | 150 150
* Month code | Code: 85 | 75 75
          | | | 75 75
          | Go to WORK/C to update other information such as |
USER: 701 FN | a review date. You may also need a DISA panel. | :
DO: S IMS: G +-----+-----+ 3
  
```

Enter participation code 85 and hit "Enter".

Check CASE D TIME to see if the case closed. If it did not, ask a supervisor or BPS to turn the case around using STAT C TRANS. If the case is still not closed, check ELIG C RUFA. It may need to be approved. A closure notice will automatically be created.

Write a CATN with:

- Name of participant who did not comply
- Name of supervisor who approved closure
- Reason for closure

Two parent households

If there are two parents receiving Reach Up and the non-engaging parent is not the head of household, enter any CATNs under both parent’s SSNs (if possible).

Protected participation code

If the participation code is "protected" and ACCESS will not allow the code to be entered directly in WORK C, place cursor over the participation code, and hit Shift F12 for the Help field. Here the code should be unprotected and it can be updated to code 85.