# **P-2201 APPLICATION (continued)**

# P-2201B Interview (23-12)

Households <u>must</u> complete an interview at application (Reach Up rule 2208.2).

# **Scheduling Interview**

Send the <u>ESD 202C</u>, <u>Benefits Interview Appointment Notice</u>, via ACCESS when you receive the ESD 202. Allow the household five calendar days to complete the interview.

**Note:** The ADPC sends the ESD 202C for applications received by them.

Complete the interview as soon as possible after the application date to allow the household to receive benefits within 30-days of that date.

## Who to Interview

Hold the interview with one of the following persons:
<ul> <li>☐ Head of Household</li> <li>☐ Spouse,</li> <li>☐ Other responsible household member</li> <li>☐ Authorized representative (Reach Up rule 2204)</li> </ul>
<b>Note</b> : People being interviewed may bring anyone they choose to the interview.
How to Complete the Interview
Complete the interview by telephone. Make two cold call attempts to the household to complete the interview when they are not at the office.
<b>Exception</b> : Complete a face-to-face interview for the following reasons:
<ul><li>☐ Household or authorized representative request.</li><li>☐ Needed to resolve or clarify specific issues.</li></ul>
CATN if the interview was completed by telephone or face-to-face.
Prior to the Interview

Review ACCESS for household information known to the agency.

#### Interview Process

Review the ESD 202 by:

Ш	going over each question and
	resolving any unclear or missing information with the person being
	interviewed.
Advise	the person of the household's:
	·
	Basic Reach Up facts including Family's Countable Months
	• Review the Reach Up Interview Talking Points found on the Reach Up
	Eligibility Worksheet (form 203RU)
П	Processing timeframes
$\overline{\Box}$	How benefits are issued
	Rights and responsibilities
	Responsibility to report changes
	· · · · · · · · · · · · · · · · · · ·
	Verifications needed to determine eligibility

Provide the household with an ESD 202V, verification request, via ACCESS listing the required verifications needed to determine eligibility and the due date.

Advise the household that the verifications <u>must</u> be returned within ten-days of the interview.

#### **Forms**

The following forms must be provided by the household

ESD 614FDP	Initial Family Development Plan (FDP)—both parents in a
	two-parent household can sign one Initial Family
	Development Plan
ESD 137	Child Support Referral forms—one for each absent parent
<b>ESD 137W</b>	Child Support Waiver Request—if applicant wants to pursue
	a waiver from having to work with Office of Child Support
ESD 201DD	Direct Deposit form—if a checking account is available
<b>ESD 210U</b>	Pregnancy Certification—if no other child is in the home
ESD 202TANF	Closure letter from other state—if received benefits in
	another state

### Missed Interview

Send Households who do not complete an interview within 5 days an ESD 202D, Notice of Missed Interview (NOMI) via ACCESS. The NOMI tells the household:

they missed their interview appointment,
they are responsible to reschedule the interview appointment, and
the application will be denied on the 30th day if the interview is not
completed.

Deny the application on the  $30^{th}$  day from the application date if the household misses their first interview and does <u>not</u> reschedule.

Households that complete their interview within the 30-day application processing period <u>must</u> have their eligibility determined.

# **BPS Support**

#### Prior to the Interview

Review the <u>Interview Script</u> for Reach Up (red track).

Check following screens in ACCESS:

• Check PERS D- Person Search

```
10/27/15 12:15 PERSON SEARCH DISPLAY ASPAHB

*** SSN *** ******** NAME ***************** SEX BIRTH DATE DEATH DATE

SEARCH: XXX-XX-XXXXX
MATCH: XXX-XX-XXXX ADAM M SMIT M 05/15/1995 / /

KNOWN AS: CASE OF: * CASE ID * DO/IM PROGRAMS

VHC APPLICANT SMIT, ADAM XXX-XX-XXXX Y SY2

PA APPLICANT SMIT, ADAM XXX-XX-XXXX Y SY2 FS SF

SELF SMIT, ADAM XXX-XX-XXXX Y SY2 FS ME SF

MEMBER SMIT, ABIGAIL XXX-XX-XXXX Y 295 NO

IV-D CHILD # 0 SMIT, ABIGAIL XXX-XX-XXXX

IV-D CHILD # 1 SMIT, ABIGAIL XXX-XX-XXXX

USER: 084 FNX: PERS MODE: D ID: XXX XX XXXX PERIOD: 10 15 COMMAND:

VALID COMMANDS: PERS HIST INSU MEDI MED FS PREM HIPS EXIT DISP: 1
```

 Check PERS D HIST- Person History (shows if person was active in another HOH Reach Up Household)

```
01/28/16 09:25 PERSON HISTORY STATUS
SSN: 666-74-8505 RACHEL E MENDLESON DOB: 08/16/1982 SEX: F
UID: 475687 666-66-6666 RA MONTHS LEFT: 24
RA MONTHS:
CAT-CODE START END REM-RSN REPORTING-GROUP STATUS

*** REACH UP HISTORY ***

05 01 2014 666-74-8505 DENIED
02 01 2011 05 31 2011 26 666-74-8505 CLOSED
06 01 2010 01 31 2011 57 666-74-8505 CLOSED
09 01 2000 12 15 2000 57 666-74-8505 CLOSED
09 01 2000 06 30 2000 66 666-74-8505 CLOSED
03 01 2000 06 30 2000 66 666-74-8505 CLOSED
06 01 1998 03 31 2000 66 666-74-8505 CLOSED
06 16 1997 05 31 1998 61 666-66-6666 CLOSED
06 10 1998 03 31 2995 57 666-66-6666 CLOSED
11 01 1995 06 15 1997 57 666-66-6666 CLOSED
11 01 1991 10 31 1995 57 666-66-6666 CLOSED
04 01 1989 10 31 1991 57 666-66-6666 CLOSED
04 01 1989 10 31 1991 57 666-66-6666 CLOSED
02 16 1985 04 15 1989 57 666-66-6666 CLOSED
USER: 084 FNX: PERS MODE: D RPTGRP: 666 74 8505 PERIOD: 01 16 COMMAND:
VALID COMMANDS: PERS HIST INSU MEDI MED FS PREM HIPS EXIT
```

• Check CASE D HIST- Case History (shows if HOH was active on Reach Up)

08/28/15 08:28 \*\*\* CASE STATUS: HIST \*\*\* (ASPEBF) ADDRESS: DO: J ST. JOHNSBURY 13 APPLE ST IMS: SJ2 JDO NON-FINANCIAL ST JOHNSBURY VT 05819 REP FREQ: 12 LATEST STAT: 09 2015 PHONE: 555-1684 \*\*\* PROGRAM PARTICIPATION HISTORY \*\*\* \*\*\* RUFA \*\*\* APPLIED 10/03/14 GRANTED 10/10/14 VER: 1 CLOSED 12/31/14 VER: 3 12/14 SSF 12/01/14 12/31/14 10/10/14 11/30/14 RUFA APPLIED 12/01/12 DENIED 11/28/12 VER: 1 APPLIED 11/20/12 DENIED 11/28/12 VER: 1 \*\*\* HEALTH CARE \*\*\* APPLIED 05/01/14 GRANTED 07/23/14 VER: 1 APPLIED 11/20/12 GRANTED 11/28/12 VER: 1 CLOSED 04/30/14 VER: 2 04/14 \*\*\* FOOD STAMPS \*\*\* APPLIED 08/12/15 GRANTED 08/28/15 VER: 1 USER: 084 FNX: CASE MODE: D RPTGRP: 666 66 6666 PERIOD: 08 15 COMMAND: DO: J IMS: SJ2 RPTGRP NAME: AMANDA BERNS 3

• Check **SPEC/C/CLOCK F10** – (Number of TANF months, 60+ months)

SSN	:	NAME:			
TANF Months:	2 Total Mont	hs: 17	Vermont	Countable	Months: 2
Period	Funding	Part	icipation	Minor	Countable
	Stream	Other			
2004 03	T		05		Y
2004 04	T		05		Y
2017 06	S	PSE	05		N
2017 08	S	PSE	05		N
2017 09	S	PSE	05		N
2017 10	S	PSE	02		N
2017 11	S	PSE	02		N
2017 12	S	PSE	02		N
2018 01	S	PSE	02		N
2018 02	S	PSE	02		N
2018 03	S	PSE	02		N
2018 04	S	PSE	02		N
2018 05	S	PSE	02		N
2018 06	S	PSE	02		N
2018 07	S	PSE	02		N

• Check **STAT** panels (**STAT C PSUM** – Summary of panels)

```
01/28/16 13:40 *** PSUM: STATEMENT OF NEED PANELS CHECKLIST ***
                                                                                      ASPAAUS
                                         666-45-4585
JENNIFER
              R SANTINO
                                                                        REL
                                                                                 DOB
  STAT
          1450 RTE 15 APT 2 CAMBRIDGE VT 05444
ADDR
                                                       666-45-4585 01 11/24/1980
MEMB.01 JENNIFER R SANTINO
MEMB.02 ROGER
                                                       666-44-7744 02 09/08/1975
                           F BARRY
MEMB.03 AMY
SCHL.01 AMY
                          P SANTINO CANE
                                                      666-41-7318 07 01/02/2001
 SCHL.01 AMY P SANTINO CANE
DISA.01 ROGER F BARRY
MEDI.01 ROGER F BARRY
INSU.01 JENNIFER R SANTINO
THE COMMENT OF T
 INSU.02 AMY P SANTINO CANE
ABSP.01 MARVIN B CANE
ABSP.02 JESSICA SANTINO
 BANK.01 ROGER
                         F BARRY
  UNEA.01 AMY
                          P SANTINO CANE
 UNEA.02 ROGER
                         F BARRY
USER: 084 FNX: STAT MODE: D RPTGRP: 666 45 4585 PERIOD: 01 16 COMMAND:
DO: A IMS: GA1 REPORTING ADULT: JENNIFER
                                                    R SANTINO
```

Check last 6 months of CATN and TODO's (or to last application if prior to 6 months)

### **Interview Process**

Reach Up Interview Talking Points found on the 203RU:

- Discuss differences between: Reach Up, Reach First, Reach Ahead and Post-Secondary Education Program.
- Explain to participants what to expect next (appt. with Case Manager) and what forms will be sent to them.
- Remind participants the importance of Case Management meeting and the rights and responsibilities.

Use <u>Reach First Flowchart</u> to determine if participant is appropriate for Reach First.

- Check CASE D HIST for RF in the last 12 months.
- Before ending interview clearly state if Reach First mandatory or eligible.
- After interview, enter CATN "Determined that [RU or RF or PSE] was most appropriate program."