

P-2201 APPLICATION (continued)

P-2201B Interview (23-12)

Households must complete an interview at application (Reach Up rule 2208.2).

Scheduling Interview

Send the [ESD 202C, Benefits Interview Appointment Notice](#), 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:

- Head of Household
- Spouse,
- Other responsible household member
- Authorized representative (Reach Up rule 2204)

Note: 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.

Exception: Complete a face-to-face interview for the following reasons:

- Household or authorized representative request.
- Needed to resolve or clarify specific issues.

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:

- 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](#))
- Processing timeframes
- 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 must 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
- [ESD 137W](#) 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
- [ESD 210U](#) 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 30th day from the application date if the household misses their first interview and does not reschedule.

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

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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
                  RUFA              10/10/14  11/30/14
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
  
```

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

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          SSN:                NAME:
TANF Months:      2   Total Months:   17   Vermont Countable Months:      2
Period           Funding      Participation  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
PF7-Previous    PF8-Next          CANC / EXIT :
  
```

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

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01/28/16 13:40 *** PSUM: STATEMENT OF NEED PANELS CHECKLIST *** ASPAAUS
JENNIFER      R SANTINO                666-45-4585
                                     REL      DOB
STAT
ADDR 1450 RTE 15 APT 2 CAMBRIDGE VT 05444
MEMB.01 JENNIFER      R SANTINO                666-45-4585    01 11/24/1980
MEMB.02 ROGER         F BARRY                 666-44-7744    02 09/08/1975
MEMB.03 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
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

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- 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 [Reach First Flowchart](#) 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."