

STATE OF VERMONT  
AGENCY OF HUMAN SERVICES

**DCF**

**Department for Children and Families**



**FROM:** Sean Brown, Deputy Commissioner  
Economic Services Division

**BULLETIN NO.:** B15-14

**DATE:** January 2, 2015

**SUBJECT:** Reach Up Services Procedures – Self Sufficiency Matrix

**CHANGES ADOPTED EFFECTIVE** 1/2/2015

**INSTRUCTIONS**

- Maintain Manual - See instructions below.**
- Proposed Regulation - Retain bulletin and attachments until you receive Manual Maintenance Bulletin: \_\_\_\_\_**
- Information or Instructions - Retain until \_\_\_\_\_**

**MANUAL REFERENCE(S):**

P-2346

This is a new bulletin for Reach Up Services, to establish procedures for the completion of the Self-Sufficiency Outcome Matrix [SSOM]. The SSOM will replace the current Family Support Matrix form. The information from the SSOM will be entered into the ACCESS version of the Family Support Matrix (FSM).

**Manual Maintenance**

**Reach Up Services Procedures**

**Remove**

None

**Insert**

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P-2346 Self-Sufficiency Outcome Matrix Procedures

The Self-Sufficiency Outcome Matrix [SSOM] will be completed during the initial 30 day assessment period and also at a minimum of every six months thereafter. The SSOM will also be updated any time a significant change occurs.

The SSOM is a tool with which a Case Manager and participant may develop a base line of where the participant believes they are in 19 domains impacting their ability to achieve financial self-sufficiency and family well-being. The same tool will be utilized throughout the participants' involvement with the program to help document changes, provide feedback to participant and Case Manager, and provide information used in the creation and updating of the Family Development Plan.

A. Initial SSOM

1. The Case Manager and participant will meet together to discuss the SSOM tool and agree on the rating for each domain. It is anticipated that most such meetings will require about an hour.
2. The Case Manager will note on the tool the rating for each domain and any related information used in reaching this score.
3. The Case Manager and participant will prioritize the domains to utilize in development of the FDP.
4. The Case Manager will total the numerical ratings by adding together the number from each domain.
5. The Case Manager will complete a literacy assessment based on observation and related discussion during the completion of the SSOM.
6. The Case Manager will provide a photocopy of the instrument to the participant to take away with them.
7. The Case Manager will then utilize the crosswalk contained within the SSOM to enter the data into the Family Support Matrix in ACCESS.

B. Scheduled Reviews

1. The SSOM will be reviewed at least every six months while the participant is involved with Reach Up Services.
2. The Case Manager will meet with the participant to complete the review.
3. The Case Manager and participant will complete a new SSOM tool, utilizing the previous one as a basis for their discussion.
4. The Case Manager and participant will review the goal prioritization together.

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5. The Case Manager will total the score and provide a photocopy of the finished instrument to the participant.
6. The Case Manager will update the FSM in ACCESS to reflect any changes from the previous SSOM entered, and also update the date of the FSM in ACCESS.
7. The completion date of the review will be included on each quarterly FDP case load review submitted to the Reach Up Team Leader by the Case Manager.
  - a. If an SSOM has not been completed within six months the Case Manager will schedule an appointment with the participant and note that date on the annotated case list.
  - b. If an SSOM has not been completed within six months because the participant is not cooperating with services the Case Manager should note this in a case note, and on the annotated case list.

C. Reviews at the time of Significant Events

1. When a significant event occurs which causes a change the FSM should be updated by the case manager by entering the changes into ACCESS and updating the date of completion.
2. The Case Manager should case note the nature of the change, what was changed in the FSM and any other relevant information as well as how the FDP was updated.

D. Entering the information into ACCESS

1. Use the Self-Sufficiency Matrix document to enter each domain into the corresponding categories in the Family Support Matrix (FSM) in ACCESS.
  - a) Red = interfere; Blue = Neutral; Green = Strength
2. If an ACCESS FSM category contains more than one SSOM domain, enter it as the lowest of the two domains. For example the FSM category "Finance" contains the domains "Income" and "Credit History." If the Credit History score is "5," but the "Income" category is "3," enter it into ACCESS as "neutral."

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E. Team Leader's Role

1. Team Leaders will review the participant list and randomly review 2-3 cases on the list, comparing them to the participant's SSOM in the case file.
2. If there is a discrepancy between the case manager's note (either "current SSOM" or "needs appointment") on the participant list and what is in the case file, follow up with the case manager.