STATE OF VERMONT
AGENCY OF HUMAN SERVICES

DCF

Department for Children and Families

B U L L E T I N NO.: 18-02

FROM: Sean Brown, Deputy Commissioner
Economic Services Division

DATE: 1/8/18

SUBJECT: Reach Up Services Procedures

CHANGES ADOPTED EFFECTIVE ___1/8/18_____

INSTRUCTIONS

__X__ **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	P-2347	P-2350	TOC (P-2300)

The purpose of this bulletin is to move the Reach Up Services Self Sufficiency Outcome Matrix (SSOM) procedure to a more appropriate place and make minor updates to the procedures related to the SSOM. The bulletin also reformats the Support Service procedures and corrects a page removal error that was found on Bulletin 17-22. The Reach Up Services Table of Contents has also been updated to reflect these changes.

Manual Maintenance

Vertical lines in the left margin indicate significant changes.
Dotted lines in the left margin indicate changes in formatting rather than content.

Reach Up Services Procedures

Remove	Insert
TOC 2300 (B17-22)	TOC 2300 (B18-02)
P-2347 (B17-22)	P-2347A (B18-02)
Nothing	P-2347B (B18-02)
Nothing	P-2347C (B18-02)
P-2347H p.3 (B97-22)	Nothing
P-2346 (B15-14)	P-2350A (B18-02)
P-2350 (B15-36)	P-2350B (B18-02)

P-2347   Support Services

A. General Procedure

Support Services are intended to help individuals accept or maintain paid employment; or participate in other Reach Up activities such as orientation, assessment, appointments, and activities that help the participant reach an employment goal.

1. Support Services may be provided to Reach First, Reach Up, Reach Ahead, and Post-Secondary Education participants.
   a. Participant's may also be eligible if their Reach First, Reach Up or Post-Secondary Education benefits close due to income from unsubsidized employment that are meeting or exceeding the work requirements for Reach Up for the family's size and composition. (Code 99)
   b. Participant's applying for Reach Up may receive support services to attend orientation. Support Service would include transportation (example: Ready to Go) or transitional childcare
   c. Participant's that have received 60 months of Reach Up benefits may receive support services during their two pending weeks.

2. The type of activity the individual is participating in determines which specific support service(s) may be available to the individual. Activities include paid employment, Reach Up Orientation, Reach Up Pending two Weeks, Reach Up assessment, and participation in Family Development Plan (FDP) activities.

   a. The Reach Up Case Manager and the participant will determine if support services are needed.

   b. The Reach Up Case Manager and the participant should explore all other resources before using support services. If there are no other resources, the case manager refers to the support service matrix for support services amounts and guidelines.

   c. The Reach Up Case Manager will document support service in case notes.

      i.   Case note will include the support service, the amount, and date issued.

3. Reach Up Case Managers have two days to issue a support service check after receiving a bill or request for payment from a partner, local business, or participant.

P-2347　Support Services (continued)

B.　Writing a Support Services Check in ACCESS

　1.　Enter CHCK in the FNX field, C in MODE, the head of household's SSN in RPTGRP, and the current month in PERIOD. (Leave COMMAND blank) and Hit Enter.

```
05/25/16 11:28              IV-A SELECT FUNCTION              ASTCA1

  ~~~~   Function Codes (FNX)  ~~~~       ~~~~   Function Codes (FNX)   ~~~~
 ABWD - ABAWD Food Stamp History        MAIL - Send or Read Mail
 APPL - Application                     MANA - Managed Care Maintenance
 CASE - Case Status Display             MONY - Financial Subsystem
 CATN - Case Action Log                 NAME - User Name/Number Lookup
 CATS - Cost Allocation/Time Study      PCOL - Premium Collections
 EDS  - Medicaid Management System      PERS - Person Search
 ELIG - Eligibility Results/Approval    PMGT - Premium MGT Report
 FIAT - Fiat Eligibility                PREM - Premium Management
 FUEL - Supplemental Fuel               QUAL - Quality Review
 GAEL - General Assistance              RECO - Recoupment Schedule
 IDEA - System Change Request           REPT - Report Selection
 INFC - Interfaces                      SPEC - Special Functions
 INQB - Benefit History                 STAT - Statement of Need
 INQD - Benefit Disbursement History    SUBS - Substitute Reporter/Payee
 IV-D - IV-D Select Function            TODO - Daily To-Do Report
 JFIP - Jobs For Independence           UNLK - Releases Locked Cases
 LOGO - Logoff                          VEND - Vendor Search
        ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
 USER:    FNX: chck MODE: c RPTGRP: HOH SSN     PERIOD: 05 16 COMMAND:
                                                          F8 = MORE
```

⇧　　⇧　　⇧

　2.　Enter RCHP in the Program field, and the SSN of the participant the support service is for, next to Reach Up Client SSN. Hit Enter

　　a.　In 2 parent families, the Reporting Group SSN will always be the head of household's social security number. The Reach Up Client SSN will be the social security number of the participant the support service check is for.

```
                                                     ASPSA1
        * * * * *  M O N Y   CHECKWRITE   S U B M E N U  * * * * *

                Reporting Group: HOH SSN

⇨              Program:   RCHP

                    Period
              ** From **    *** To ***
              MM DD CCYY    MM DD CCYY
              05 01 2016    05 31 2016

⇨ Reach Up Client SSN: SSN of the participant the support service is for


        Entering 'CANC' here will abort check process:    ___
```

P-2347   Support Services

B. Writing a Support Services Check in ACCESS (Continued)

3. Select an item that corresponds to the check you are writing by placing an "X" on the line. After you have selected your Item hit Enter.

a. Multiple items may be selected if the check is going to the same person.

Example: If you are reimbursing a participant for Travel Expense and Clothing, both items may be selected and one check can be issued.

```
05/25/16 11:53              RCHP SELECTION SCREEN              ASQSAA1A
            Client:              TONYA                      Page:  1
Opt     Items                YTD RCHP     YTD PSE    YTD WORK   YTD ORNT
  _     1) Educational/Training Fees
  _     2) Tuition
  _     3) Books/Supplies
  _    51) Clothing/Pers. Appearance
  _    52) Making It Work
  _    53) Travel Expense
  x    54) Vehicle Repair
  _    55) Work Related Equipment
  _    56) Six Month Job Retention
  _    57) Dental/Vision/Med Rec Req
  _    58) Parenting Education
  _    59) Vehicle Insurance
  _    60) Vehicle Registration/Titl
  _    61) Education Incentive Paymt
  _    62) Permit/License/Exam
  _    63) GNG/CAM Vehicles
  _    64) Child Care(incl rec pgms)
('X' up to 5)        YTD Total:           No Childcare/WORK/ORNT/PSE incl
USER: 310    RPTGRP:           FNX: CHCK  MODE: C
RPTGRP NAME: TONYA                          DO:        COMMAND: _____
```

b. There are additional items on the next page. Hit enter on the first page and it will automatically bring you to the additional items on the next page. Select an item that corresponds to the check you are writing by placing an "X" on the line and Hit Enter. If an item was selected on the previous panel an additional item does not need to be selected Hit Enter to move to the next panel.

```
05/27/16 09:41              RCHP SELECTION SCREEN              ASQSAA1E
            Client:              TONYA                      Page:  2
Opt     Items                YTD RCHP     YTD PSE    YTD WORK   YTD ORNT
  _    65) Discretionary Traing Fund
  _    66) FDP Activity Incentive
  _    67) DDir Approved Funds
  _    68) PSE Other
  _    69) 'Old' PSE Stipend




('X' up to 5)        YTD Total:           No Childcare/WORK/ORNT/PSE incl
USER:        RPTGRP:           FNX: CHCK  MODE: C
RPTGRP NAME: TONYA                          DO:        COMMAND: _____
```
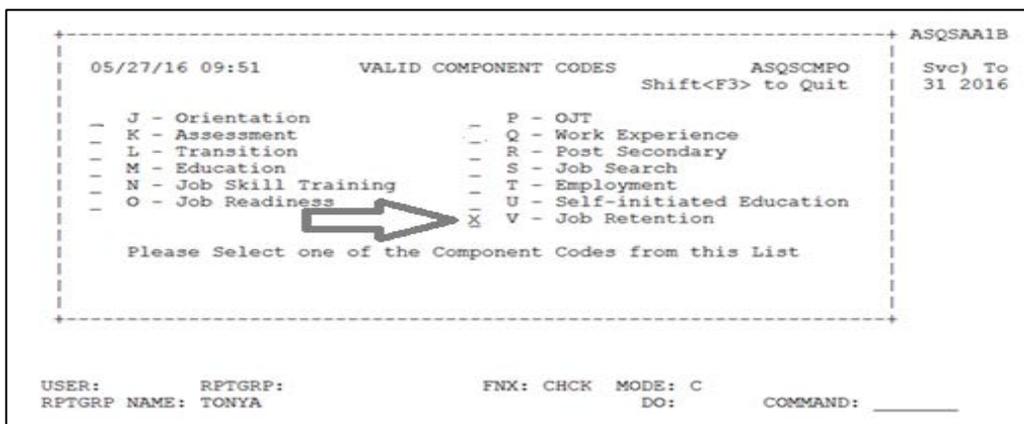
P-2347   Support Services

B. Writing a Support Services Check in ACCESS (Continued)

4. Select the component that matches with the Family Development Plan activity the participant
    is receiving support services for.

    a. Hit the F12 key or shift F12 on "Component" to see a list of options.
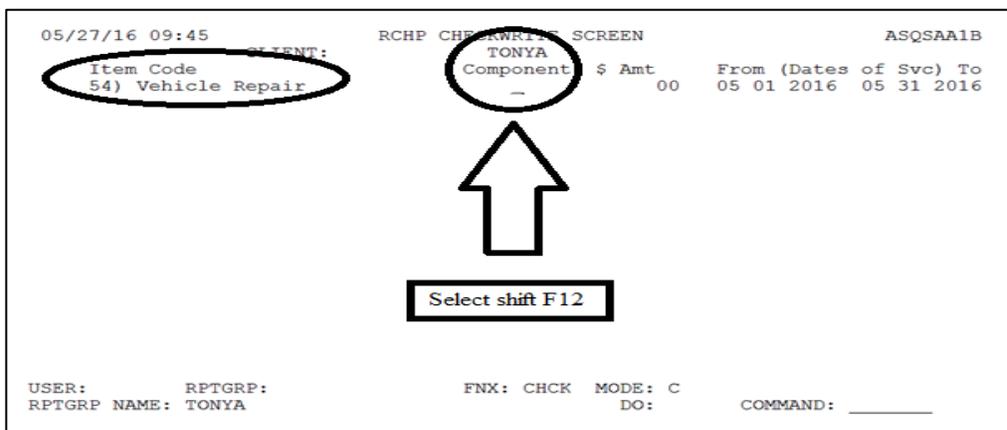
    b. After hitting the F12 key or shift F12 on "Component" to see a list of options, the Valid
        Component Codes will appear. Place an "X" on the line next to the appropriate activity for
        which the support service is being issued. If the participant is engaged in more than one
        activity, and the support service relates to more than one activity, choose only one (you
        cannot check more than one letter/component code). Hit Enter.

    c. For Reach Ahead recipients and closed participants eligible for the 6-month support
        services extension, always use component code "V" (Job Retention).

P-2347   Support Services

B. Writing a Support Services Check in ACCESS (Continued)

5. You will return to the RCHP CHECKWRITE SCREEN where the component code you
    selected will appear.

6. Enter the check amount in the "$ Amt" field, and the date(s) of service in the "From (Dates of
    Svc) To" field. Hit Enter.

    a. For Vehicle Repair, use the date the vehicle repairs were completed, or if the check is for
        Travel Expense for job search, use the dates the mileage reimbursement covers.

P-2347   Support Services

B. Writing a Support Services Check in ACCESS (Continued)

7. Complete "RCHP VALIDCHECK SCREEN"

a. "VENDOR NUMBER": Leave blank

b. "VENDOR NAME": Enter the business/service provider's name if you want the check
    sent directly to the provider.

c. If you want it sent to the participant, leave this field blank.

d. "ADDRESS": Enter the address you want the check sent to.

e. If you want the check sent to the participant, leave blank.

    i.   The exception to this is in circumstances where you may want to make the check out to
         the provider (for example, Dept. of Motor Vehicles or an insurance company) but have
         the check sent to the participant. In this instance, you need to fill in the participant's
         address.

f. "MEMO": This field allows you to write a short message, special instructions, your
    contact information, a policy number…etc. There is a limited amount of space with no
    expansion or "second page" feature. The participant's name appears on the check even
    when it is made out to someone else, so there is no need to identify who the check is for in
    the MEMO section. The name has been "blacked out" in the sample ACCESS screen shot
    below for confidentiality purposes.

g. Hit Enter.

P-2347   Support Services

B. Writing a Support Services Check in ACCESS (Continued)

8. The RCHP APPROVAL SCREEN is your last chance to cancel the check. Review the check
    the amount, the address, the name of the participant/vendor, and anything you've written in the
    MEMO section to make sure everything is accurate.

    a. Type "CANC" in COMMAND and hit Enter to return to the main menu if you wish to
        cancel the check you are writing or start over.

    b. Type "PREV" in COMMAND and hit Enter to return to the previous page of the check
        writing process to make changes.

9. After reviewing the RCHP APPROVAL SCREEN and confirming all information is accurate.
    Type your 4-character password, type APP in the COMMAND field, and hit enter.

```
05/27/16 10:10                 RCHP APPROVAL SCREEN               ASQSAA1D
                 Client:            TONYA


Check Paid to: Roy's Service Center           Check Amount:    400.00
               23 North Pleasant St
               Middlebury      VT 05753        Check Date:    05/27/16


          FOR: TONYA


   Memo Lines: 54)Vehicle Repair  Q-Work Exprnce   400.00 05/01/16-05/31/16
               This check is for repairs completed on MM/DD/YYYY. If you ha
               ve any questions about this check, please call case manager
               name and phone number.




USER:        RPTGRP:            FNX: CHCK  MODE: C           PASS: XXXX
RPTGRP NAME: TONYA                         DO:       COMMAND: APP
```

10. Document the support service provided in your case notes and place the printed copy of the
    check in the participants file.

P-2347   Support Services (continued)

C. Stopping or canceling a check.

1. To stop a check from being issued on the same day.

   a. Reach Up Case Manager sends an email to the Reach Up Supervisor indicating you want
       to void a support services check. Include the client name, social security number, and
       check transaction number.

       i. Transaction number is found by going to INQD/D.

```
12/23/16 06:52                IV-A SELECT FUNCTION                        ASTCA1

    ~~~~   Function Codes (FNX)  ~~~~      ~~~~   Function Codes (FNX)   ~~~~
  ABWD - ABAWD Food Stamp History       MAIL - Send or Read Mail
  APPL - Application                    MANA - Managed Care Maintenance
  CASE - Case Status Display            MONY - Financial Subsystem
  CATN - Case Action Log                NAME - User Name/Number Lookup
  CATS - Cost Allocation/Time Study     PCOL - Premium Collections
  EDS  - Medicaid Management System     PERS - Person Search
  ELIG - Eligibility Results/Approval   PMGT - Premium MGT Report
  FIAT - Fiat Eligibility               PREM - Premium Management
  FUEL - Supplemental Fuel              QUAL - Quality Review
  GAEL - General Assistance             RECO - Recoupment Schedule
  IDEA - System Change Request          REPT - Report Selection
  INFC - Interfaces                     SPEC - Special Functions
  INQB - Benefit History                STAT - Statement of Need
  INQD - Benefit Disbursement History   SUBS - Substitute Reporter/Payee
  IV-D - IV-D Select Function           TODO - Daily To-Do Report
  JFIP - Jobs For Independence          UNLK - Releases Locked Cases
  LOGO - Logoff                         VEND - Vendor Search
        ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
 USER: 310 FNX: INQD MODE: D RPTGRP: HOH SSN    PERIOD: 12 16 COMMAND:
                                                            F8 = MORE
```

       ii. Hit enter.

```
        ****   M O N Y   INQUIRY - DISBURSEMENT HISTORY   ****        ASPSIB

                For Reporting Group SSN (          )

                Issued from ( MM / CCYY ) to ( MM / CCYY )
                         ( 12 / 2016 ) to ( 12 / 2017 )

                Indicate the types desired using an X

                        ( X )  All types
                (   )  ANFC/RUFA including Family Bonus/Parent Share
                (   )  IVD PA               (   )   PSE/RPSE
                (   )  Food Stamps          (   )   CSE
                (   )  General Assistance   (   )   Lund Home
                (   )  Medicaid             (   )   DEFRA
                (   )  Essential Person     (   )   EFA
                (   )  Fuel                 (   )   Administration
                (   )  IV-D                 (   )   E&T
                (   )  RCHP/WORK/ORNT/WTW   (   )   CC
                (   )  TCC                  (   )   DISP
                (   )  Premium Refund       (   )   RA

        USER:    FNX: INQD MODE: D RPTGRP: HOH SSN    PERIOD: 12 16 COMMAND:
```
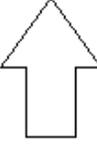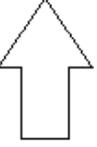
P-2347   Support Services

C. Stopping or canceling a check. (Continued)

> iii.   Determine which check you want to cancel. The Transaction number will be located on the left under "*Tran Nbr*".

> b. The Reach Up Supervisor will e-mail COPS at AHS.DCFESDCOPS@vermont.gov

>> i.   Do not assume you successfully voided the check unless you get a response back. Depending on the time of day your e-mail is sent and staffing on that day, COPS may or may not be able to fulfill your request. COPS will also make sure this issuance is voided from the participant's support services issuance history in ACCESS.

2. If the request is not made the same day the check was written or if COPS is unable to cancel your check. Request a stop payment from the Electronic Benefits Unit.

> a. Reach Up Case Manager sends an email to the Reach Up Supervisor stating payment for a support services check needs to be stopped. Include the client's name, social security number, and check number. AND enter a CATN with an explanation of why the request was made to cancel the check.

P-2347   Support Services

C. Stopping or canceling a check. (Continued)

      i.   Check number is found by going to INQD/D.

```
12/23/16 06:52              IV-A  SELECT  FUNCTION                    ASTCA1

  ~~~~   Function Codes (FNX)  ~~~~      ~~~~   Function Codes (FNX)  ~~~~
  ABWD - ABAWD Food Stamp History       MAIL - Send or Read Mail
  APPL - Application                    MANA - Managed Care Maintenance
  CASE - Case Status Display            MONY - Financial Subsystem
  CATN - Case Action Log                NAME - User Name/Number Lookup
  CATS - Cost Allocation/Time Study     PCOL - Premium Collections
  EDS  - Medicaid Management System     PERS - Person Search
  ELIG - Eligibility Results/Approval   PMGT - Premium MGT Report
  FIAT - Fiat Eligibility               PREM - Premium Management
  FUEL - Supplemental Fuel              QUAL - Quality Review
  GAEL - General Assistance             RECO - Recoupment Schedule
  IDEA - System Change Request          REPT - Report Selection
  INFC - Interfaces                     SPEC - Special Functions
  INQB - Benefit History                STAT - Statement of Need
  INQD - Benefit Disbursement History   SUBS - Substitute Reporter/Payee
  IV-D - IV-D Select Function           TODO - Daily To-Do Report
  JFIP - Jobs For Independence          UNLK - Releases Locked Cases
  LOGO - Logoff                         VEND - Vendor Search
         ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
 USER: 310 FNX: INQD MODE: D RPTGRP: HOH SSN    PERIOD: 12 16 COMMAND:
                                                             F8 = MORE
```

      ii.   Hit enter

```
     ****   M O N Y   INQUIRY - DISBURSEMENT HISTORY   ****        ASPSIB

            For Reporting Group SSN (        ´         )

            Issued from ( MM / CCYY ) to ( MM / CCYY )
                        ( 12 / 2016 ) to ( 12 / 2017 )

            Indicate the types desired using an X

                    ( X )  All types
              (   )  ANFC/RUFA including Family Bonus/Parent Share
              (   )  IVD PA                (   )  PSE/RPSE
              (   )  Food Stamps           (   )  CSE
              (   )  General Assistance    (   )  Lund Home
              (   )  Medicaid              (   )  DEFRA
              (   )  Essential Person      (   )  EFA
              (   )  Fuel                  (   )  Administration
              (   )  IV-D                  (   )  E&T
              (   )  RCHP/WORK/ORNT/WTW    (   )  CC
              (   )  TCC                   (   )  DISP
              (   )  Premium Refund        (   )  RA

   USER:    FNX: INQD MODE: D RPTGRP: HOH SSN    PERIOD: 12 16 COMMAND:
```
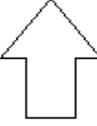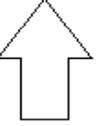
P-2347   Support Services

C. Stopping or canceling a check. (Continued)

      iii. Determine which check you want to cancel. The Check number will be located in the
           middle under "*Check No*".


```
                                                                        ASPSIB
                    *** M O N Y   INQUIRY - DISBURSEMENT HISTORY ***
      For SSN:
        Name:                                      Issued from: 12/16 - 12/17
      S**Tran Nbr* Issued *Prog*CC*S*Check No* Amount *Type*  From  -   To   *E*A*Wrk
      -           12/01/16 RUFA XS E  DIR DEP    321.00  SO  12/01/16-12/15/16
      -           12/01/16 RCHP 53 I              17.50  DO  12/01/16-12/31/16
      x  99999999 12/08/16 RCHP 53 I  Z9999999    70.00  DO  12/01/16-12/31/16
      =           12/15/16 RUFA XS E             214.00  DO  12/01/16-12/31/16
      -       .   12/19/16 RCHP 53 I              52.50  DO  12/01/16-12/31/16



      Check transaction            Check Number
      number

        * Enter L for Link Detail, any other letter for Transaction Detail
      USER:     FNX: INQD MODE: D RPTGRP: HOH SSN    PERIOD: 12 16 COMMAND:
```

      b. The Reach Up Supervisor will send an e-mail to the EBT (Electronic Benefits Unit) at
          ahs.dcfesdlockbox@vermont.gov and email COPS to have the transaction deleted from the
          participant's support services issuance history.

3. To void checks, returned by the participant, the post office or a provider:

      a. The Reach Up Case Manager documents in case notes and enters a CATN the check was
          returned. The case manager writes "void" on the check and gives the check to the Reach
          Up Supervisor.

      b. The Reach Up Supervisor sends the check to the Business Office: DCF Business Office,
          EBT Unit, 280 State Drive, Waterbury, VT 05671-3711.

4. Refund checks from service providers:

      a. The Reach Up Case Manager documents in case notes and gives the check to the Reach
          Up Supervisor.

      b. The Reach Up Supervisor sends the check to the Business Office: DCF Business Office,
          EBT Unit, 280 State Drive, Waterbury, VT 05671-3711.

          i. Include a note indicating the check is a refund for a Reach Up support service.

P-2350   Self Sufficiency Outcome Matrix

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. Self Sufficiency Outcome Matrix Procedures

1. Initial SSOM

a. 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.

b. The Case Manager will note on the tool the rating for each domain and any related information used in reaching this score.

c. The Case Manager and participant will prioritize the domains to utilize in development of the FDP.

d. The Case Manager will complete a literacy assessment based on observation and related discussion during the completion of the SSOM.

e. The Case Manager will provide a photocopy of the instrument to the participant to take away with them if interested.

f. The Case Manager will then utilize the crosswalk contained within the SSOM to enter the data into the Family Support Matrix in ACCESS.

2. Scheduled Reviews

a. The SSOM will be reviewed at least every six months while the participant is involved with Reach Up Services.

b. The Case Manager will meet with the participant to complete the review.

P-2350   Self Sufficiency Outcome Matrix

A. Self Sufficiency Outcome Matrix Procedures (continued)

   c. The Case Manager and participant will complete a new SSOM tool, utilizing the previous
       one as a basis for their discussion.

   d. The Case Manager and participant will review the goal prioritization together.

   e. The Case Manager provide a photocopy of the finished instrument to the participant if
       interested.

   f. 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.

3. Reviews at the time of Significant Events

   a. When a significant event occurs which causes a change the FSM should be updated by the
       case manager by entering the changes into ACCESS.

   b. 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.

4. Entering the information into ACCESS

   a. Use the Self-Sufficiency Matrix document to enter each domain into the corresponding
       categories in the Family Support Matrix (FSM) in ACCESS.

                    Red = interfere; Blue = Neutral; Green = Strength

   b. 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."

5. Reach Up Supervisor's Role

   a. Reach Up Supervisor's will review the SSOM when completing Case Management
       Supervisory Case Reviews (SCRs).

P-2350   Self Sufficiency Outcome Matrix (continued)

B. 18 and 36 Month Case Reviews Using the Self Sufficiency Outcomes Matrix (SSOM)

According to rule 2302.4, the Department must conduct a case review when a participant has reached 18 and 36 cumulative months of Reach Up assistance. This review will determine if the participant:

- is in compliance with the FDP and/or work requirement
- is properly claiming a deferment if applicable
- has any unaddressed barriers to self-sufficiency and if so, how will those barriers be addressed by the Department or other state programs.

In addition, at both 18 and 36 month reviews, or as soon as practical thereafter, the Case Manager will have a discussion with the participant about their financial situation, giving information about earning scenarios combined with program benefits to promote work.

The 18 or 36 month review process is outlined below.

1. Case Manager will identify participants who have received 18 or 36 months of Reach Up assistance by using either REPT D TIME in ACCESS or upon receipt of TODO message. These reviews need to be completed by the first day of the 19th and 37th month

2. Case Manager checks the case file to see when the last SSOM was completed.

    a. If it was done within the past 1-3 months:

        i.   Case manager makes a note on the SSOM that this will serve as the 18 or 36 month review whichever is appropriate.
        ii. Case manager writes a case note in the case management file that summarizes the above 3 bullet points relating to rule 2302.4.

    b. If the SSOM was done within the past 4-6 months:

        i.   Case manager schedules a meeting to complete an updated SSOM with the participant.
        ii.   When this is done, case manager makes a note on the completed form that it serves as either the 18 or 36 month review.
        iii. Case manager enters a case note in the file that summarizes the above 3 bullet points relating to rule 2302.4.

3. Case manager makes sure that a current, signed Family Development Plan is in the case file. If not, a new FDP needs to be done with the participant. Case manager indicates on the FDP that this encompasses the 18 or 36 month review and makes a case note in the file.

P-2350   Self Sufficiency Outcome Matrix

B. 18 and 36 Month Case Reviews Using the Self Sufficiency Outcomes Matrix (SSOM) (continued)

4. Case manager enters information into ACCESS on the FSM panel if a new SSOM is completed for either the 18 or 36 month review.

5. Reach Up Supervisor reviews the SSOM and FDP and enters and signs a case note that this has occurred.

6. Reach Up Supervisor decides with case manager which cases to present to full team for new ideas and resources. Case Managers will present the more challenging cases at regularly scheduled team meetings.

7. Reach Up Supervisor will share with the Director, AOPS and partner leaders as trends or training needs are discovered.

8. Copies of forms will be maintained in the case file as well as the supervisory file when appropriate.