

#### 24.4 LOCAL OFFICE RESPONSIBILITIES IN THE WORK PROGRAM ASPECT OF WV WORKS

In addition to the responsibilities contained in other chapters of this Manual, the Worker has responsibilities related to the work program aspect of WV WORKS.

The Worker must assist the client in all reasonable ways to achieve self-sufficiency. To accomplish this, the Worker must assess the client's knowledge and skills, work with the client and make informed recommendations about courses of action appropriate for each individual to develop a plan that is expected to lead to self-sufficiency. In addition, he must enter into an agreement with the client concerning his involvement in the process of becoming self-sufficient, monitor the client's progress to determine changing needs and the need for support service payments and take appropriate follow-up action based on the client's actions.

The eligibility requirement of the negotiated agreement, the Personal Responsibility Contract, is detailed in Chapter 1. Other requirements, particularly those dealing with the client's continuing eligibility, are found throughout this Manual. Chapter 13 contains other information about the eligibility aspect of the work requirements. The following sections in this Chapter are devoted to work activities and follow-up actions and contain information necessary for the Worker to assist the client in becoming self-sufficient and in developing opportunities for him.

##### A. CASE MANAGEMENT

The Work Programs (WP) sub-system in RAPIDS assists the Worker in managing the work program aspect of WV WORKS.

To meet the goals of the WV WORKS Program, a Worker performs the following activities for WV WORKS families:

- Determines initial and ongoing case and individual eligibility. When the WV WORKS family also receives Food Stamps and/or Medicaid, eligibility for these Programs is also determined and maintained by the same Worker
- Negotiates the PRC with the client to determine the best means to achieve self-sufficiency and accept personal responsibility. The initial PRC, including Part II, must be manually completed by the Worker. Once this is completed and all other eligibility requirements are met, the case is confirmed in

RAPIDS and the referral to the WP subsystem is accomplished. The Worker may complete WP information after that time, but must not require the client to visit the office again to be present during the WP enrollment process.

Changes to Part II of the initial PRC are made using WP screens WPJS and WPAS. Such changes are attached to the initial PRC.

- Establishes for the client only reasonable and appropriate requirements related to the client's capability to perform the tasks on a regular basis, including physical capacity, psychological fitness, maturity, skills, experience, family responsibilities and place of residence. In addition, reasonable and appropriate requirements take into account the client's proficiency and child care and other support services needs.
- Monitors compliance with the PRC
- Provides continuous assessment of the client's needs and goals and negotiates adjustments to the PRC as necessary
- Determines which clients are temporarily exempt from meeting the work requirement and assists the client in becoming able to participate
- Determines good cause for failure to comply with the PRC
- Applies sanctions as appropriate
- Develops employment and other work activity opportunities for the client within the community
- At the discretion of the CSM, WV WORKS staff may continue to carry the Medicaid and/or Food Stamp portion of the case once WV WORKS benefits are stopped, to allow for continuity and follow-up on the client's progress.
- Makes referrals to other community services
- Provides payment for support services, as appropriate

- Identifies potential resources and makes appropriate referrals to secure them
- Conducts a home visit or a work/activity-site visit a minimum of once each 12 months.

This case management process provides for substantial flexibility in administration of the work component of WV WORKS, but the mandates must be met for each adult to meet a work requirement and for the State to meet and maintain an established participation rate. The Worker has the discretion to tailor the work requirements to the needs and goals of each family. Therefore, there are no mandatory procedures or processes that must be applied to each family. Instead, the Worker's reasonable and appropriate guidance and discretion are used to assist the client in accepting personal responsibility and achieving self-sufficiency.

Self-sufficiency is defined as being able to provide for the family's basic needs without relying on WV WORKS monthly cash assistance. It is recognized that some families will not be able to become completely self-sufficient. For these families the goal is to reduce the reliance on cash assistance as much as possible.

#### B. ASSESSMENT

The assessment of the adult or emancipated minor's goals, skills, needs and challenges naturally centers on the client. However, any assessment completed must be a family assessment since the client is part of the family and is often considered head of the family. In addition, making life better for the family can be a motivational factor in the case management process. Assessment begins at application and does not end until case management stops.

A Family Assessment means evaluation of work skills, prior work experience, employability, education and challenges to becoming self-sufficient, such as, but not limited to, mental and physical health issues, lack of transportation and child care.

An in-depth assessment is necessary to discover the client's challenges to meeting his goals and to develop plans to overcome them.

The assessment is limited to producing information useful to both the client and the Worker in evaluating the client's challenges and in meeting his goals.

Rather than being a fixed process with mandated procedures, assessment is an ongoing activity. As the client's circumstances change, his goals and/or challenges may change, resulting in changes in the actions or activities necessary for him to succeed.

The assessment process necessarily includes a series of interviews/conversations with the client. It may also include educational and/or aptitude/interest testing and interpretation of this information; identification of the client's skills, abilities and interests; use of community resources; and research into possible employment opportunities.

The following RAPIDS screens record the appropriate assessment results. Their use is mandatory.

- WPED (Education)
- WPAW (Employment)
- WPJR (Participation Readiness)

The WV WORKS Self-Sufficiency Appraisal Form, OFA-WVW-3A, is essential to the assessment process and its use is mandatory for all adults and emancipated minors who are included in a WV WORKS check. The purpose of the form is to gather pertinent information about the client: work experience, what type of work the client desires, educational background, family information and family support system, individual and family health, client's finances, life situations, and goals. This information, along with testing and other assessment information, is used to negotiate the client's Self-Sufficiency Plan (Part 2, PRC). It is expected that the Self-Sufficiency Plan (SSP) will be a step-by-step plan to lead the client toward his goal and self-sufficiency.

In order to gain as much information as possible prior to negotiation of the first full SSP, a home visit is required within 45 days of the date of application. At a minimum, the Worker must review the completed appraisal form with the client during the home visit. The first full SSP and the appraisal form must also be completed within 45 days of the date of application, so the home visit must not be delayed until the last day.

The form is designed for either the client or Worker to complete and may be completed in the office or at the client's home. Allowing the client to take it home to complete gives him the opportunity to think about his strengths, what he wants to change about his life and what he would like to obtain for himself and his family. If the Worker asks the client to complete the form at home and return it prior to the home visit, there is no penalty for failure to return the self-completed form. Instead, the Worker will take another form to the home visit and complete it at that time.

If desired, the Worker may complete the first full SSP in the client's home during the home visit, after reviewing the appraisal form and all other assessment information.

Additional helpful information in the workbook "Making Case Management Work" may be used by the Worker and is available in each District office.

The product of the ongoing assessment process is a series of SSP's that reflect the client's changing circumstances and tasks that move him toward self-sufficiency. Failure, without good cause, to keep appointments to initiate or continue the assessment process indicates a failure/refusal to cooperate or participate. When the first home visit is scheduled in writing, a second appointment need not be made before imposing a sanction, unless the applicant has good cause or contacts the Worker to reschedule the appointment. When the first home visit is unscheduled, a sanction may not be imposed for failure to be available. Instead, the Worker must schedule a second appointment in writing. Failure, without good cause, to keep the second appointment or reschedule it results in imposition of a sanction.

The applicant may provide written notice of the appointment by including it on the initial PRC or by using any approved appointment forms. The written notice may be given to him during the interview or may be mailed. If no record of the issuance of the notice will be shown in RAPIDS or on a signed PRC, the Worker must record that such a notice was issued and include the date/time of the appointment.

C. ASSESSMENT TESTING

In assessing the client's current situation and negotiating the PRC, the Worker must explore family situations, education, work history, skills, aptitudes, attitude toward work, employment potential, possible social services or other support systems including physical, mental and emotional fitness, and the need for support service payments. Form WT DFA-WVA-3A may be used as an interviewing guide, but the areas explored are not limited to those on the form. Individual circumstances may require varying degrees of exploration. The Worker may include educational assessment testing.

Assessment testing consists of the Test of Adult Basic Education (TABE) or Comprehensive Adult Student Assessment System (CASAS), Learning Needs Screening, and Work Keys. The purpose of using TABE and CASAS is to measure basic academic skills such as reading, math, language, and spelling.

The Learning Needs Screening, completed at the time TABE or CASAS is administered, is used to screen for possible learning disabilities. Based on the results, referrals may be made to the Division of Rehabilitation Services (DRS) for further assessment and diagnosis of possible learning disabilities and/or for accommodations to be made in an ABE/GED class, or for other training/employment programs.

The Learning Needs Screening is completed by or for the client and is voluntary. A referral may be made to the Department of Education Assessment Specialist for TABE or CASAS testing, Learning Needs Screening, and Work Keys testing as appropriate. WV WORKS staff may complete the Learning Needs Screening if necessary. If this is done, the WV WORKS Supervisor must send a copy of the completed Learning Needs Screening to the DFA WV WORKS Unit, Attention: Education Agreement Staff Member. However, it is recommended that the Assessment Specialists complete the Learning Needs Screening on all clients scheduled for assessment testing. When WV WORKS staff learns that an ABE teacher has completed the Learning Needs Screening, a copy of this form must also be forwarded to the DFA WV WORKS Unit.

1. Scheduling For TABE or CASAS

All WV WORKS recipients are to be scheduled for TABE or CASAS and Learning Needs Screening referral unless the following circumstances exist:

- Client has completed two or more years of college. The Worker has discretion in having these individuals tested; or
- Client is scheduled to begin a job which will make the family financially ineligible for a monthly WV WORKS check.
- Other documented conditions exist that prevent effective assessment. These reasons must be documented in the case recording; or
- Client completed TABE, CASAS, or other appropriate assessment testing at another agency, training facility, etc. within the previous two years, unless one of the conditions exists under the second and third bullets listed below for repeated assessment testing.

After the initial basic skills assessment (TABE or CASAS), WV WORKS recipients are referred for re-testing under the following conditions:

- Two years have elapsed since the initial assessment;
- More than one year has elapsed and the client wants to enroll in an education or training program; or
- Specific instances have occurred, such as a head injury that could impact learning ability.

Clients may be referred for either the TABE or CASAS testing. It is not necessary to have both. Copies of test results are to be requested for participants who have completed TABE, CASAS, Work Keys, or other similar assessment testing at BEP, ABE, One-Stop Centers, vocational training centers, etc.

Based on the elements measured by each test, as found below, the Worker determines which test is more appropriate.

- CASAS measures life skills involving reading and math in the context of work-related questions. Scores can be correlated to grade level equivalents for reading and math only.

- TABE measures reading, math and language skills through real-life and academic questions. Scores are given in grade level equivalents. Participants being referred to vocational training, other training programs/college should be administered the TABE.

## 2. Work Keys

Work Keys assessment measures basic skill levels and determines how they compare to the skills required for specific jobs. Skill areas include Reading for Information, Locating Information, and Applied Math. Work Keys can be used to match clients to specific jobs for which they are qualified, determine skill gaps for desired jobs, and/or serve as an effective tool in employment portfolios. The Work Keys Occupational Profiles handbook, which is available in local offices shows job profiles and skill levels required for each job. In addition, certain companies in West Virginia have specified those Work Keys skill levels required for their occupations. Clients falling below the specified skill level required in one of the three skill areas may be referred to an ABE classroom to upgrade that specific area or areas.

Recipients are to be scheduled for Work Keys testing under the following circumstances:

- Assessment testing indicates client has a seventh grade or higher level in reading and math; and
- Guidance is needed to effectively determine appropriate job placement; or
- Client has a fifth-grade or higher level in math and reading when businesses in the area use Work Keys in the hiring process, or when local staff is working closely with the community colleges to develop specific job or skills training.

Recipients are referred for retesting as follows:

- Client has successfully completed vocational skills training, or college; or
- Client has upgraded basic skills in ABE or has passed the GED; or
- Skill areas from initial Work Keys testing have

been successfully upgraded as a result of referral and attendance in an ABE class or other training facility.

3. Referral For Assessment Testing

Referral for assessment testing is accomplished by forwarding a memorandum or a list of names of clients scheduled. The test administrator is responsible for completing a release of information for each client.

4. Worker Follow-Up

When the test results are received, the Worker records the information on the appropriate RAPIDS screen. An interview is scheduled with the client as soon as possible, to discuss the test results. At this interview, the client may be provided with a copy of the test results. Staff may contact the Department of Education Assessment Specialist for questions or help in evaluating the results of TABE,

CASAS, Learning Needs Screening, or Work Keys. Special attention should be paid to the recommendations made by the Assessment Specialist on page 4 of the Learning Needs Screening for possible referral to programs and services.

5. Testing Requirements For WIA

Most, if not all, Workforce Investment Act (WIA)- funded employment and training programs now require that TABE, CASAS, or similar academic skills testing, and, in many cases, Work Keys be completed by clients referred to and enrolled in those programs. Therefore, the Worker must schedule clients for the appropriate assessment testing whenever possible.

6. Delays In Testing

If circumstances prevent assessment testing by the Assessment Specialist in time for a client to enter ABE, training, employment, or another program, alternate assessment testing arrangements may be made. This could be referral to an ABE teacher, One-Stop Center, or BEP office. It is important, however, that a Learning Needs Screening be completed by WV WORKS staff or by the ABE teacher for clients tested at those facilities.

However, whenever possible, clients are to be scheduled for assessment testing administered by the Assessment Specialists.

7. Substance Abuse

If the client indicates substance abuse problems, referral for evaluation and counseling should be made prior to scheduling assessment testing. Any determination of substance abuse problems is based on statements made by the client, not on the feelings or perceptions of the Worker.

D. DEVELOPMENT OF THE PRC SELF-SUFFICIENCY PLAN

**NOTE:** See Chapter 1 for information about the PRC as an eligibility requirement and about completion of an initial SSP and the first full SSP.

RAPIDS screens WPJS and WPAS allow for the recording and printing of Part 2 of the PRC.

The PRC is a document that consists of 2 parts. Part I contains information and requirements applicable to all individuals who are required to sign it. Part II is the Self-Sufficiency Plan which is the result of negotiations between the client and the Worker. The Self-Sufficiency Plan (SSP) is subject to renegotiation throughout the client's receipt of cash assistance. Initial and ongoing assessment produces information that allows the Worker to provide reasonable guidance to the client to attain his goals and forms the basis of the Plan.

The promotion of self-sufficiency is accomplished primarily through the use of the SSP. The SSP is completed during a negotiation between the Worker and the adult(s) and/or emancipated minor(s) in each AG. During the negotiation, the client must be encouraged to provide information about his goals for becoming self-sufficient and the means by which his goals may be achieved. If the client does not have defined self-sufficiency goals, the Worker must encourage him to consider such goals in consultation with his family before the PRC is updated.

The Worker must explore all of the desires and work goals presented by the client to determine which are possible, which can be accomplished with the resources available to the client and to the Department, which can be accomplished in an

appropriate time and, ultimately, which is most likely to result in self-sufficiency for the client. In addition, the Worker must explore other possibilities not presented by the client and offer these

to the client as alternatives. At all times, the Worker is expected to balance the client's wishes with his need to achieve self-sufficiency and the Department's goal of meeting federally-established participation rates.

All requirements listed on the SSP must be reasonable and appropriate for the individual client.

The SSP must be specific enough to provide direction for the client and must reflect careful analysis of the client's needs and potential. It must also be flexible enough to change as opportunities and situations warrant. Changes in occupational goals or activities to meet the client's work requirement require revisions to the SSP. Each time the SSP is revised on a paper form, the client and the Worker must initial and date the changes. When a new SSP is completed, both must sign and date the form. The client must be provided with a copy of the SSP each time a new one is completed or a revision is made to an existing one.

The SSP outlines the objectives and the steps needed to achieve self-sufficiency, as well as a time frame for the completion of program requirements. Specific duties are required.

It may be possible for the client to achieve self-sufficiency without a document defining specific activities. However, clarifying goals and actions to reach the goals helps the client and Worker to focus on the most appropriate actions. This makes their efforts more productive. Although the primary concern should be the development of a meaningful SSP, the form itself is helpful to the client in understanding the expectations. Committing the plan to writing also helps the Worker be more specific about his responsibilities. By signing the PRC, each party agrees to fulfill his respective responsibilities.

#### E. JOB DEVELOPMENT

Job development and the subsequent placement of individuals in employment are the primary focus of WV WORKS. The WV WORKS staff is expected to be visible in the community and participate in various employment-related activities and initiatives. The WV WORKS staff is expected to relate to private employers and related organizations professionally, honestly and with integrity.

Job development and placement efforts must be coordinated closely with the local Job Service Office. As appropriate, clients are required to register with the Job Service Office and to keep their applications current. The results of ABLE or other career-oriented testing is shared with the Job Service Office as needed. A Release of Information form must be signed by the client prior to the sharing of information. The form must be placed in the case record. To increase the resources available to the client, contacts are established and maintained with DRS, Department of Education, Community Action agencies and other public and private organizations that could offer activities or support.

F. CHILD CARE REFERRAL

Child care must be made available to any client who needs it in order to accept employment or to participate in another work activity. The client must be referred to the appropriate Resource and Referral agency. Child care must be arranged before placement.

G. MENTORING

When the Worker and the client agree that the client could benefit from a mentor for counseling and guidance, the client may be assigned to a mentor. Mentoring may be accomplished by assigning a mentor to work individually with one or more clients. In addition, a mentor or team of 2 or more mentors may provide assistance to one or a group of clients. The method selected is based on the client's needs and the resources available.

**NOTE:** Being a mentor does not allow access to or knowledge of confidential information about the client. The Worker must obtain the client's written permission prior to providing such information to the mentor. A general waiver allowing information to be shared with the mentor is not sufficient; a waiver is required for each piece of information shared or one waiver may identify each piece of information. The client may provide any personal or confidential information to the mentor that he chooses.

A mentor must:

- Be gainfully employed or retired from gainful employment;
- Have sufficient time available to provide guidance for the client;

- Set the boundaries of the relationship, so that the client is guided by, but not dependent upon, the mentor;
- Consult frequently with the Worker about guidance provided to the client;
- Notify the Worker immediately upon deciding to terminate the relationship with the client;
- Adhere to the Department's standards of confidentiality regarding case record information.

A mentor must not:

- Be a relative or married to a relative of the client;
- Have a relationship with the client prior to becoming a mentor;
- Have a physically intimate relationship with the client;
- Loan or give the client money.

Being a mentor may include counseling and guidance in decision making, handling crises, reminders to keep medical appointments, assistance in accessing resources, transportation, arranging child or elder care, providing emergency child or elder care, planning so that household tasks are done in spite of work schedules and children, improving employability, learning to shop wisely, planning meals, and any other aspects of the client's life that can lead him toward self-sufficiency. Mentoring may be particularly beneficial to minor parents or other young parents.

#### H. DOMESTIC VIOLENCE ASSISTANCE

The Worker must inform each applicant/recipient of the availability of services related to prevention of domestic violence. To protect the abused person when the information is offered to more than one adult or emancipated minor in the family at the same time, it must

be stressed that the Worker is required to provide the information to all clients. The instructions about domestic violence assistance in Sections 1.2 and 1.25 must be followed.

I. VISION AND/OR DENTAL SERVICES

Providing dental and vision services is a cooperative effort between the WV WORKS Program and the Office of Maternal, Child and Family Health (OMCFH).

The WV WORKS staff's responsibility is limited to completion of form OFA-R-1 to refer eligible clients to OMCFH, to certify that the client is eligible to receive vision and/or dental services, and to explain to the client the importance of keeping his scheduled appointments and the deadline for his appointment.

Only one OFA-R-1 is completed, even when the client is being referred for both services. The distribution of the color copies is shown on the bottom of the form. The Worker must make certain the last copy of the NCR form is legible when the form is completed. If it is not, the Workers must write over the information on the last copy and forward to OMCFH.

The referral for vision/dental services is time-limited. The client must schedule and keep the first appointment with the service provider within 6 months of the referral date shown on the OFA-R-1. The Worker must enter the date (mm/dd/yy) on the OFA-R-1.

**NOTE:** Simply scheduling an appointment with the service provider within 6 months does not meet the requirement. The appointment must be kept within 6 months of the referral date in order for payment to be made.

When the client has been unable to schedule and keep an appointment during this time, another referral may be issued. However, if the reason he was unable to get an appointment was a delay in starting the process, he is permitted only one additional referral.

To be eligible to receive vision and/or dental services, the client must be in either of the 2 following groups:

1. Participating

To qualify based on participation in an activity, the client must meet both of the following requirements.

- The individual must be an adult recipient of WV WORKS when the referral is made. Receipt of DCA alone does not qualify the individual for these services. Once the referral is made, services continue whether or not the client remains eligible for WV WORKS; and
- The individual is participating in an activity listed in Section 24.6 through Section 24.13. The rate of participation required to qualify for these services is the rate shown on the individual's PRC.

2. Sole Barrier to Participation

When the sole barrier to the client's participation in a work activity listed in Section 24.5 is the need for vision and/or dental services, a referral may be made. Once the referral is made, services continue whether or not the client remains eligible for WV WORKS.

OMCFH has signed agreements with service sites which detail the allowable services, reimbursements, scope of services, etc. In addition, OMCFH will provide a list of all providers to the appropriate county. The client may choose his own provider from this list. Distribution of copies of the form in a timely manners is crucial.

There is a maximum lifetime limit on the payment for these services. This limit is monitored by OFMCH. Closure of the vision and/or dental services case by OFMCH occurs when services are completed or the maximum allowable benefits are reached.

## J. WV WHEELS

The purpose of WV WHEELS is to assist in eliminating transportation as a barrier by providing the client with an opportunity to contract with a vendor to lease a vehicle and own it after the contract is satisfied. The Worker initiates the process by referring appropriate clients to the WV WHEELS vendor in his Region.

### 1. Appropriate Referrals

WV WORKS recipients and those eligible for continued support service payments may be referred. The following requirements must be met when determining an appropriate referral:

- Valid driver's license.
- The unavailability of public transportation.
- The client does not already own a road worthy vehicle, or it is a two-parent household and another vehicle is required.

**EXCEPTION:** When the client already owns a vehicle and repairs to make it road-worthy exceed its value, a referral may be made to WV WHEELS.

- The need to meet a work activity or continue employment.
- The client does not have a criminal driving record, such as but not limited to, a DUI conviction in the past 3 years, hit and run, flight to avoid arrest. Clients who have completed a State-approved driving class and have had their licenses restored may be referred.
- The client has the financial ability to make payments.

Participation in WV Wheels is limited to one time per individual. If an AG contains two parents and two vehicles are required, each one may participate in the program.

It is only necessary that the client be an active adult WV WORKS AG member or eligible for continued support service payments at the time of referral and lease signature. Subsequent ineligibility for either program, or moving to another county or Region within the State does not affect the continuation of the lease agreement. When a client moves out of state, the lease agreement becomes null and void, and he may negotiate a buy-out agreement with the vendor. Support service payments for relocation must never be used to assist the client in paying the buy-out.

If the client already has a vehicle(s) registered in his name, he must provide documentation that:

- the vehicle(s) is junked; or
- the cost of repairs exceeds the limit specified in Section 24.14; or
- the other parent needs the vehicle for employment or to participate in an activity.

Once the client signs a lease agreement with the vendor, he is no longer eligible for support service payments for auto insurance or vehicle repair, for the duration of the lease agreement.

The client's failure to comply with the vendor's requirements without good cause will result in loss of the vehicle, and all of the money the client has paid toward the lease. In addition, the client must not be referred again to the program. Failure to comply with the lease agreement and loss of the car of itself is not a sanctionable offense.

Loss of the car does not constitute good cause for failure to meet a work requirement. The Worker must carefully evaluate the circumstances of each client's situation.

## 2. Referral Process

Referrals to the WV Wheels vendor are made using form OFS-WHEELS-1. The form is self-explanatory, and all requested information on the form is mandatory.

When the vendor notifies the Worker of approval or denial for participation in the program, the Worker must record the appropriate information in RAPIDS. If the vendor notifies the Worker that the client is not a suitable candidate for the program, the vendor must provide a written explanation.

## 3. Vendor Responsibilities

Upon receipt of the OFS-WHEELS-1, the vendor completes an evaluation process with the client, and if determined a suitable candidate, completes and signs a vehicle lease-purchase agreement with the client. The vendor provides the client with a road-worthy vehicle, provides regular maintenance on the vehicle, and provides insurance at the prevailing class rate. The client must agree to make the vehicle payments on time and make the vehicle available for regular maintenance. If the client fails to comply with the lease agreement and it is terminated, the vendor must notify the Worker.

Upon successful completion of the 24-month lease, the client receives the title to the vehicle from the vendor.

## K. PERIODIC SELF-SUFFICIENCY EVALUATIONS 24/36/48 MONTHS

**NOTE:** Failure, without good cause, of the client to attend or otherwise cooperate in the scheduled evaluations results in application of a sanction. It is suggested that the evaluations be listed specifically on the PRC to avoid questions about notification of the requirement. However, the general statement on the PRC form about keeping all appointments will usually serve for application of a sanction.

After a client has received WV WORKS for 24 months, a face-to-face meeting must be scheduled with the adults or emancipated minors in the WV WORKS AG to evaluate the progress of the self-sufficiency plan and to develop a new plan as needed. The meeting must occur during the 24<sup>th</sup> or 25<sup>th</sup> month of receipt of WV WORKS benefits. The purpose of this meeting is to complete a mandatory case staffing which is to include the client, other parent in the household (even if the other parent is excluded from the AG), the Worker, the Supervisor, other DHHR staff as needed, any community resource person(s) directly working with the client, and a representative of the client's choosing.

At this meeting, any additional barriers to self-sufficiency should be identified and solutions to overcome those barriers explored. The client should be encouraged to make decisions regarding those barriers and the solutions. At this meeting, the PRC and assessment form must be reviewed and updated as needed.

**NOTE:** If the requirements in Section 13.9,B regarding submitting a MRT application are not met by this time, it must be completed as necessary during the 24 month evaluation.

Another face-to-face evaluation must be completed after the client has received WV WORKS for 36 months.

This meeting must occur during the 36<sup>th</sup> or 37<sup>th</sup> month of WV WORKS receipt. It will serve the same purpose and follow the same pattern as the 24-month evaluation. In addition, the client must be offered a referral to an intensive case management agency, if there is an available slot. This 36-month meeting must also include the CSM or his designee.

An additional face-to-face evaluation must be completed after the client has received WV WORKS for 48 months. This meeting must occur during the 48<sup>th</sup> or 49<sup>th</sup> month of receipt. It follows the same pattern as the 36-month evaluation. However, a referral to an intensive case management agency is mandatory after receipt of benefits for 48 months. If there are no available slots with such an agency, the Worker must provide the intensive case management services.

When an AG is closed prior to the 24, 36 or 48<sup>th</sup> month and reapplies in the month an evaluation would normally be due, the evaluation is not completed prior to approval. Instead, the AG will be evaluated at the next scheduled interval that is 3 or more months in the future. This also applies when the AG is closed in the 24, 36 or 48<sup>th</sup> month before the evaluation takes place. The Supervisor may decide on a case-by-case basis that the evaluation that is due in the month of application or within 3 months of that date needs to be completed.

**EXAMPLE:** An AG is closed effective August when the father finds full-time employment. He gets laid off at the end of September and reapplies for WV WORKS in October. The AG is due for a 24-month evaluation in October, but it is postponed until the 48<sup>th</sup> month because it is the next evaluation interval that is 3 or more months ahead.

**EXAMPLE:** An AG is due for its 48-month evaluation in November 2003, but the AG is closed effective November before the evaluation takes place. The AG reapplies in February 2004. The Worker does not back up and complete the missed 48-month evaluation. Instead the 55<sup>th</sup> month case review is the next required contact.

L. EXIT INTERVIEW IN 59<sup>TH</sup> MONTH

During the 59<sup>th</sup> month of receipt of WV WORKS or prior to the end of the extension period, if one was granted, the Worker must complete an exit interview with the adult AG members. During this exit interview, the Worker gives information to the clients about community resources and makes necessary referrals. In addition, the Worker completes a final assessment to determine the need for any additional services, such as, but not limited to Food Stamps and Medicaid, if not already received. The health and welfare of the children in the household should also be discussed during this meeting.

Form OFA-EXIT-1 must be completed and signed by the client(s) and the Worker. If the client does not choose to participate, the Worker completes the form based only on case record information and knowledge of the client.