

EXTENSION STAFFING STEP-BY-STEP GUIDANCE

This document compliments ATAP manual section 701 and WSPM section 1016-5

Families who have used 57 or more months of assistance at the time they apply for TA must immediately receive an extension staffing. If the family is on extension and requests another extension, they must receive another extension staffing held prior to the end of the current extension. If the family does not request another extension and plans to close their case, they receive an exit staffing prior to their case closing.

If a client does not report for the staffing as scheduled, the team will attempt to call them and conduct the staffing telephonically. If the client cannot be reached, the team will proceed with the staffing, gathering input from each team member and will follow with the processes below. Attempts to reach the client will be documented in client notes.

Staffings will include at least two staff members at the absolute minimum. Best practice is for this to include the Case Manager & Supervisor; and, it may include other DPA staff or partner agency staff the client is working with. DPA eligibility staff **may** be included in an extension staffing in cases where their understanding and expertise in extension criteria is needed.

Supervisor Responsibilities:

1. Maintain and keep current a list of all clients who are on extension and when the extension ends.
2. ***On Monday after the first Saturday of the month***, print (in document direct) the individual Caseload Reports and the TANF Months Used by JAS Office report for all assigned offices.
 - a. Determine which clients are due for a staffing by comparing the above reports to the list, updating all information to keep the list current at all times.
 - b. Ensure clients whose Extension is ending the next month are scheduled for a staffing before their extension ends, before the 3rd week of the month.
3. ***By the 10th of the month for the following month:*** (Oct 10th for Nov Staffings)
 - a. Discuss staffings with case manager and book an Outlook meeting time with the Supervisor, Case Manager, and other applicable participants. Block 1.5 hours per staffing and in the subject line, include the client's name, client ID and # of months of staffing. (CM to complete this if time allows. Supervisor to guide this process.)
 - b. Book a conference room for each staffing if needed.
 - c. For 57+ months at application, check the TLIP and do a TABH/TAIH manual count of months. If the count appears incorrect, ask eligibility to do a manual count so we know extension months.
 - d. If travel is needed, request travel no less than two weeks in advance of the anticipated travel.

- e. Generate the correct EIS Staffing Notice to the family to advise them of the date, time and location of the staffing. (CM to complete this if time allows. Supervisor to guide this process.)
- f. Document in CLNO that the staffing has been scheduled, noting the date and time of the staffing.

Facilitator/Supervisor Responsibilities: *(best practice is for the supervisor to facilitate so the CM can focus on the discussion)*

1. Prepare for the Staffing by reviewing CMS/EIS, the Staffing packet from the CM and by noting any significant information that needs review during the staffing. For families who have used 57+ months of assistance at the time they apply for TA, the facilitator will complete the Case File Summary & Recommendations using notes they take during the staffing as these staffings are held immediately after application, generally without having met with a case manager.
2. Facilitate the Staffing by following the Extension Staffing outline and within 2 working days following the staffing:
 - a. Enter comprehensive notes into the Summary section of the staffing form, explaining reason for approval/denial
 - b. Copy/paste the Summary into CLNO with a clear title identifying the staffing. e.g. *68mo EXT staffing conducted mm/dd/yy*
 - c. Enter a CANO to document the approval or denial of the extension staffing. Enter only the approval, date approved thru and approval reason from the TA16. Do not enter the findings or recommendations into CANO, only CLNO.
 - d. Set an Alert indicating "EXT approved thru mm/yy".
 - e. Transmit the TA16 and the final Staffing packet to Eligibility, the Case Manager, and the Work Services Supervisor.

Case Manager Responsibilities:

1. Schedule a time to meet with the client and complete the Staffing packet at least a week prior to the staffing. If the client does not attend, the case manager will complete the Staffing packet in as great of detail as possible.
2. Transmit the completed Staffing packet to the Supervisor and Facilitator (if not the supervisor) at least 1 day prior to the staffing.
3. Ensure partner agency staff the client is working with is invited.
4. Immediately following the staffing, develop a new FSSP with the family incorporating the staffing recommendations into the steps and goals.
5. Ensure the final copy of the Staffing packet is placed in the case management file and that the Facilitator documented the staffing in CLNO, CANO and Alert.
6. For families who are due or overdue for a Staffing at the time they apply for TA, the case manager will not complete a Case File Summary & Recommendations form as the Facilitator will do it during the Staffing. The case manager will use the staffing and EPI as the basis for their employability assessment.

OUTLINE FOR EXTENSION STAFFINGS

The facilitator of the Extension Staffing should be someone in leadership who is knowledgeable in Extension procedures and policies and is detached from the day to day client interaction. The facilitator's role is to lead the discussion, take comprehensive notes and enter the summarizing client note.

1. Welcome client and conduct introductions.
2. Explain to the client the reason for the Staffing
 - a. ATAP benefits are time limited to 60 months
 - b. State how many months they have used and how many are remaining in their lifetime.
 - c. This is a collaborative effort to help design a road map to your self-sufficiency by assessing your situation, helping identify and coordinate services and resources.
3. Have the client complete the TA16 indicating their reasons for requesting an extension.
4. Ensure the client has a copy of the staffing packet the Case Manager completed.
5. The facilitator will ask initial questions based on the staffing packet and will give the opportunity for all participants to help fill in the gaps.
6. Go through the staffing packet discussing anything that needs clarified and make changes or additions as necessary that the client provides input on.
7. Delve deeply into what the client feels is preventing them progressing toward exiting Temporary Assistance and what the team can do to assist them in reaching their goals.
8. CM should address any unresolved issues noted in Family Progress Reports.
9. Ask the client and case manager to provide any additional information that will help us to have a complete picture of their situation and to make a determination.
10. Develop a list of recommendations for the client's particular situation, with input from the team and client.
11. Close the staffing by reviewing the recommendations.
12. Ask if the client or anyone else has any questions or anything to add.
13. The facilitator will make a recommendation on extension approval/denial taking into consideration all information and policies. The team will discuss and come to consensus.
 - a. Review extension criteria to determine if the family is eligible for an extension due to circumstances outside of their control. In 2P families, both parents must meet extension criteria. **Review TA manual 701-4.**
14. The case manager will finish the TA16 with the extension decision.
15. The case manager will complete a new FSSP including the team's recommendations.
16. The facilitator will complete the other items in the "Extension Staffing Step-by-Step Guide".

Reasons for extension:

TA manual 701-4 – families may receive an extension to the time limit if they are unable to become self-supporting because of:

- Domestic violence – the individual is unable to participate in activities or accept or retain employment at a level that allows the family to be self-sufficient.
- Physical or mental inability to perform gainful activity – medical information must be provided on a TA10, must prevent full time work and last more than 30 days.
- Caring for a child or relative who is experiencing a disability – must require a level of care that interferes with the parent's ability to participate in activities; or,
- Hardship –
 - The family must be experiencing circumstances outside of their control that prevent the parent from participating in activities; and,
 - The loss of TA would result in conditions that threaten the health or safety of the family; and,
 - The family must be taking appropriate action to work towards self-sufficiency and working to resolve problems that interfere with their plans and activities.

Reasoning example to use in the summary for a denial:

- All possible reasons for extension were examined. There is no domestic violence, physical or mental incapacity or caring for disabled child/adult.
- Hardship does not exist as:
 - The client is not experiencing any circumstances outside of her control that prevents her from participating in work activities.
 - The loss of TA would not threaten the health or safety of the family as she has sufficient PFD, TA and FS to pay housing, food, transportation and other essential needs.
 - The client has not been taking appropriate action to work towards self-sufficiency as she has not applied for work since she was released.

Conditions that threaten the health & safety of a family are:

- Does not have sufficient income or resources to provide for housing, food, transportation, or other essential needs.
- Does not have access to support from any other source to meet those essential needs
- Does not have access to appropriate child care or other employment supports needed to maintain employment.
- Will be unable to stay together if benefits are ended.
- Is working with OCS for the safe return of a child temporarily removed from the home or to prevent removal of a child from the home, and that effort would be disrupted if benefits ended, resulting in the child being at risk of placement into emergency shelter or foster care.