REFERRAL TO CASE MANAGER PROCESS

The supervisor will:

1. Print office reports in Document Direct every Monday morning.
2. If the supervisor is out of the office, the supervisory designee will process referrals to case managers.
3. Check each office's 9-97 list for clients who have not yet been assigned to a CM
4. When a referral is received, assign the case to a CM the same day
    a. Check to see if the client was carc'd to the WF or FF caseload to assign the client to a CM on the correct track
    b. Review CLNOs to determine if the client was assigned to a CM in past 12 months and re-assign the client to the same CM if appropriate
    c. If the client has not been case managed in the past 12 months, assign the client to the next CM who is due to receive a referral based on caseload size
    d. Refer 2P families to the same case manager
    e. Ensure eligibility rolled the work activity screen to the month of TA application.
    f. Enter a CLNO noting referral, i.e., WF 2P Referral to CM **name**
    g. Update the carc to the CM's individual carc
    h. Transmit the referral information to the CM requesting they schedule an employability assessment and noting if the TA case is already open
5. Monitor referrals to ensure EAs are completed within 30 days (suggest a log)

The case manager:

1. Will call new referrals the same day to schedule for an employability assessment in the first available time slot, well within 30 days of referral.
2. If you do not reach the client, send an EIS notice immediately scheduling the EA in the first available time slot, allowing 10 days for the client to receive the notice.
3. If the referral is a returning client with a gap of less than 6 months in TA benefits and with limited complexities, may conduct the EA by phone.
4. If the TA case is already in open status, conduct the EA or short EA by phone. If the short EA is completed, you must still complete the full EA unless an exception is approved by the supervisor/manager.
5. If the client hasn't arrived for the EA within 10-15 minutes after the scheduled time, call them and attempt to complete the EA by phone rather than rescheduling it.
6. If the client is a no-show and you cannot reach them, follow the penalty process and continue to attempt to reach them to complete the EA.
7. Should make reminder calls the day before the EA appointment to alleviate no-shows and reschedules (CWE to help).