

CASE MANAGEMENT CHECKLIST

| TASK | System | RESOURCES ON WEBSITE |
|--|----------------------------|---|
| Verify individual is receiving SNAP: Verify individual is currently receiving federal food assistance (SNAP) in MAXIS. | MAXIS | SNAP E&T Provider Handbo Eligibility & Enrollment Form |
| Verify participant was screened and referred by eligibility: A participant cannot be enrolled in SNAP E&T without a referral from eligibility. On the STAT/WREG panel, this date can be found on the FSET Orientation Date field. | MAXIS (STAT/WREG panel) | SNAP E&T Provider Handbo Eligibility & Enrollment Form |
| Verify if participant is time-limited: Time-limited recipients (TLR) are eligible for SNAP only three months in a 36-month period unless the individual earns additional months by meeting the work requirement. | MAXIS (STAT/WREG panel) | SNAP E&T Provider Handbo SNAP E&T Manual |
| ROLLMENT & CASE MANAGEMENT | | |
| TASK | System | RESOURCES ON WEBSITE |
| Enroll participant in SNAP E&T program sequence in Workforce One (WF1): Use the Eligibility & Enrollment form to collect all required information for enrollment. Document and case note program intentionality. | WF1 | SNAP E&T WF1 User Manua Eligibility & Enrollment Forn |
| Complete Employability Assessment: The assessment must be completed prior to opening an activity and is used to develop the employment plan. The employability assessment collects and evaluates information to identify a participant's employment goals, strengths, barriers, and support service needs. | WF1 | SNAP E&T Provider Handbo |
| Complete Employment Plan: The employment plan (EP) must be completed for each SNAP E&T participant. An employment plan may be in paper form or created electronically in WF1 but must be documented in WF1. For TLR's the plan must outline how a participant can meet the work requirements to earn additional months of benefits, if applicable. | WF1/*EDS (paper plan) | SNAP E&T Provider Handbo eDoc DHS-6020-ENG |
| Open activities: An activity must only be opened when a participant is actively engaged. The activity must be closed when the participant is no longer actively engaged. | WF1 | SNAP E&T WF1 User Manual SNAP E&T Activities Guide |
| Case note: Monthly case notes are required to show the participant's journey and engagement in the program. Include case management discussions related to goals, strengths, barriers, and any communication to eligibility worker. Ensure case notes are clear, concise, and objective. | WF1 | SNAP E&T Provider Handbo |
| Document support services: Support services must be reasonable, necessary, and directly related to an open activity. Track internally for invoicing and retain physical documentation for monitoring. | WF1 *EDS | Guidance on Cost & Reimbursements |
| Verify eligibility: Verify participant is receiving SNAP each month they are enrolled. *Case note verification | MAXIS WF1 | SNAP E&T Provider Handb |
| Exit participant from SNAP E&T sequence: SNAP E&T sequence must be closed in WF1 within 30 days of SNAP closure or after 60 days of non-engagement. A participant may also choose to exit the program at any time. | WF1 | SNAP E&T WF1 User Manu SNAP E&T Provider Handb |

^{*} Not a policy requirement; best practice

All resources can be found on the **SNAP E&T Provider website**