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Authorized Signature

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Issue Date: 11/14/2007

Topic: Other

Subject: TANF Redesign - Weekly Q & A

Applies to (check all that apply):

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|-------------------------------------|-------------------------------|-------------------------------------|---|
| <input type="checkbox"/> | All DHS employees | <input type="checkbox"/> | County Mental Health Directors |
| <input type="checkbox"/> | Area Agencies on Aging | <input type="checkbox"/> | Health Services |
| <input checked="" type="checkbox"/> | Children, Adults and Families | <input type="checkbox"/> | Seniors and People with Disabilities |
| <input type="checkbox"/> | County DD Program Managers | <input checked="" type="checkbox"/> | Other (please specify): All SS Staff, JOBS Partners |

Message:

Here is your weekly Q&A resulting primarily from Day 2 of the Summits. There has been some policy clarification since the early Summits. We will continue to answer questions as we can, focusing on your top 10-20 weekly.

You may submit questions you would like to see answered in this weekly message. We will be considering these questions as we develop future training.

Your Top Questions...

1. Are managers or lead workers required to be in staffing for DQ? Is this true for any level of DQ?

Answer: The requirement to conduct a disqualification team staffing prior to any level of disqualification has not changed. Prior to DQ 1 through DQ 3 the minimum staffing involves:

1. the case manager,
2. a line manager or their designee, and
3. a JOBS partner or another DHS staff person such as HSS4 or CRC.

If there are barriers identified, such as disability issues or domestic violence, an appropriate professional must be included in determining good cause. This person could be a mental health professional, domestic violence provider, community health nurse, etc.

Please note that prior to any level of disqualification, a child welfare representative must be consulted to assess the risk of harm the disqualification could pose to the child or children - although this person does not necessarily need to be part of the team.

Prior to DQ4 there are additional requirements. They include an attempted home visit and discussion of alternate resources. Both of these must be documented on the TRACS Re-Engagement page.

2. Is the child safety discussion required before each level of disqualification?

Answer: Yes, before each level (new instance or rolling disqualification) child safety issues must be considered. Central office is currently working with Child Welfare to develop a consistent statewide process for consultation with their staff.

3. Who makes the decision to apply a disqualification?

Answer: The decision to apply a disqualification is not made by a single individual. The decision to apply a disqualification is a team decision (see answer to question #1 for the composition of the team).

It is important to note: if a qualified and appropriate professional states a disqualification should not be applied, staff will follow that recommendation (the appropriate professional needs to provide their reasoning and this should be documented in TRACS). These professionals may include but are not limited to: mental health professionals; alcohol and drug professionals; child welfare representatives; learning disability professionals; community health nurses; medical care coordinators; domestic violence providers; disability analysts; etc.

4. Is it a requirement that the TRACS Re-Engagement page be completed and finalized before applying a disqualification?

Answer: Yes. The re-engagement process must be documented and “finalized” on the TRACS Re-Engagement page prior to applying disqualifications. This includes “rolling” disqualifications. DHS is required to document the entire process. The Re-Engagement page provides DHS the ability to record the process.

Disqualifications in which the TRACS Re-Engagement page is not used are subject to removal.

5. How are “rolling” disqualifications handled? Is a disqualification review team staffing required?

Answer: A full formal staffing does not need to be conducted because this is not considered a "new instance" of non-cooperation. However, consultations with other members of the disqualification review team should confirm their original review and assure no new information is available which should be considered.

The child safety discussion must also take place. This is a requirement prior to all levels of disqualification regardless of whether they are "rolling" or not. We are working with Child Welfare to develop a statewide process to fulfill this requirement. In the interim you still need to use your existing local process for the discussion of child safety.

Case Managers are expected to attempt to make contact with each client at a minimum of once per month. The expectation is, during this monthly contact with a client who is actively serving a disqualification, the case manager would attempt to re-engage the client in the program. During the attempted re-engagement, any screenings that were previously declined by the client must be re-offered and documented. A consultation with the disqualification team members is also required as noted earlier. Sending a computer-generated letter does not by itself meet the requirement of attempted re-engagement.

The attempted re-engagement must be documented on the TRACS Re-Engagement page. This will provide documentation that the department is following the program's requirements. The case manager would need to complete the appropriate sections of the page and finalize the record once it is completed.

6. Would we restore a case and lift the penalty if the case falls through the cracks and the re-engagement process including the child safety issues are not addressed on rolling DQ's?

Answer: Yes. If the process is not followed and documented, the disqualification may be reversed and an under-issuance paid to the client. See answers above for additional information regarding the disqualification process to include "rolling" disqualifications.

7. After applying a DQ1, will the system automatically update to DQ2 and DQ3? Or will each level require worker action? What about staffing at each level?

Answer: The current process for an active disqualification – coded on the case descriptor and need resource - automatically rolls forward to the next level. The only exception is for those moving from DQ3 to DQ4. When moving from a DQ3 to a DQ4, worker action is required since the system will not automatically end cash. There are requirements prior to any DQ rolling forward. These requirements are outlined in the answer to question #5 above.

8. If a two-parent family is in the State Family Pre-SSI/SSDI program, can the spouse of the person pursuing SSI be in the JOBS Plus program?

Answer: JOBS Plus is not an option for clients in the SFPSS Program. However, if a JOBS Plus site is available and appropriate for the non-SSI applicant, the family could choose to remain in the state funded two-parent program and participate in JOBS Plus. The Disability Analyst would continue to serve the family in these circumstances.

9. If SFPSS is all general funds, does SSA recover money from any lump sum?

Answer: Once the SFPSS client has signed the Interim Assistance Authorization (DHS 7814) the case manager is notified by the Disability Analyst to add the SFP case descriptor on the adult applying for SSI. The family is paid a grant from the SFPSS Program, which includes 43 percent of the SSI amount for the adult applying for SSI. This amount would be recovered from the lump sum by DHS and not by SSA. For months the family is on TANF and not in SFPSS, SSA would recover the TANF amount for the adult.

SSA would only collect funds for the months the client received TANF (not SFPSS or the two-parent program) if there was an application for SSI during that period.

10. If the spouse of an SSI applicant is in Work Experience (WE), does the activity count towards participation rates if the family is in the State Family Pre-SSI/SSDI program?

Answer: The hours do not count towards the federal participation rate. Families in the SFPSS Program are not receiving TANF or MOE funded assistance and, therefore, would not be part of the TANF participation requirements.

Please remember clients in the SFPSS do have access to all JOBS activities except JOBS Plus.

11. Who will input attendance for the State Family Pre-SSI/SSDI program? What documentation is required?

Answer: All SFPSS families are case managed by DHS self-sufficiency program case managers. Attendance for the SFPSS program clients would be entered consistent with Central Office attendance guidelines and the data entry process that the district or branch is currently using.

12. Who will conduct the hearings for the State Family Pre-SSI/SSDI program?

Answer: Hearings for the SFPSS Program will be conducted in the same manner as any other hearing process for self-sufficiency programs.

13. How many hours do we code for the SS (applying for SSI) activity?

Answer: The SS activity hours are determined based on the individual needs of the adult who is applying for SSI. The Case Manager, Disability Analyst and client would determine the appropriate hours.

14. How will participation in the State Family Pre-SSI/SSDI program be tracked? Or is it even necessary?

Answer: Participation in SFPSS is tracked in the same manner as participation is tracked for

TANF clients. Activities should be in case plans and the attendance should be updated in TRACS. Clients in the SFPSS program have access to all the same activities as a TANF client except for JOBS Plus.

15. If a client is denied SFPSS, can the case manager continue to support the client's SSI application process as "the participant developed plan"?

Answer: Clients who are not approved for the SFPSS program have the right to apply for SSI. They may decide to apply for SSI on their own. You can include pursuit of SSI as part of the client's mutually developed case plan.

16. In two-parent cases where one parent is able to work and the other is SFPSS appropriate and the entire case in the SFPSS program, we are getting mixed messages on how accountable we will be holding the parent who is not applying for SSI and whether or not their lack of cooperation in something appropriate can result in the entire family being removed from SFPSS and put back into TANF.

Answer: Once the SFPSS program is offered and accepted, the entire family moves into the new program. They no longer receive TANF and therefore would not be part of the federal participation requirements.

There is an expectation the parents in the SFPSS program participate at a level appropriate for the family's circumstances. The adult applying for SSI may have requirements to participate based on the pursuit of SSI. These requirements may include mental health treatment, physical therapy, attending SSA appointments or evaluations, etc.

The parent not applying for SSI may also have participation requirements. These would be based on the family situation and what is appropriate and makes sense for the family. This could mean a plan, developed in partnership with the family, ranging from 1 to 40 hours per week for the non-SSI-applying parent. The plan may include treatment, work experience, caring for a family member with a disability, etc. You may even have a situation where both adults have disability issues but only one is applying for SSI.

It is important to remember there may be significant disability issues associated with the family and it is critical the Disability Analysts, as well as qualified and appropriate partners are involved in the development of case plans, along with clients and case managers.

There may be occasions where the non-cooperation of either adult may lead to re-engagement and possible removal from the SFPSS Program.

If you have a question you would like to see answered in this weekly message, please send it to linda.weight@state.or.us

If you have any questions about this information, contact:

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