

CASE MANAGEMENT CHECKLIST

TASK	System	RESOURCES ON WEBSITE
Verify participant is receiving SNAP: Participant eligibility verification is required prior to enrolling an individual in SNAP E&T.	MAXIS	SNAP E&T Provider Handbo
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 Handboo SNAP E&T Manual
ROLLMENT & CASE MANAGEMENT		
ТАЅК	System	RESOURCES ON WEBSITE
Enroll participant in Workforce One (WF1): Document and case note program intentionality.	WF1	SNAP E&T WF1 User Manua
Complete Employability Assessment. The Employability Assessment collects and evaluates information to identify a participant's employment goals, strengths, barriers, and support service needs. The assessment must be completed prior to placement in an activity and is used to develop the employment plan.	WF1	SNAP E&T Provider Handbo
Complete Employment Plan: The plan must contain; date the plan was created, proposed E&T activities, assessed employment barriers and strengths, employment goals, participant signature, and hours required per activity if applicable. For TLR's the plan must outline how a participant can meet the work requirements to earn additional months of benefits, if applicable. An employment plan may be in paper form or created electronically in WF1 *Upload to EDS and case note.	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 in. The activity must be closed when the participant is no longer actively engaged.	WF1 /*EDS	SNAP E&T WF1 User Manual SNAP E&T Activities Guide
Case Notes: Case notes should tell the participants journey and engagement in the program. They should include discussions related to the participants goals, action steps, timeliness, strengths, and barriers. Case notes should be clear, concise, and objective. A monthly case note is required that shows participant engagement and progress.	WF1	SNAP E&T Provider Handb
Support Services: Support services must be related to an open E&T activity. Support services must be allowable, reasonable, and necessary for continued participation in an activity, and entered into WF1 with a justification case note. Track internally for invoicing and retain physical documentation for monitoring.	WF1	Guidance on Cost & Reimbursements
Eligibility Verification: Verify participant is receiving SNAP each month they are enrolled. *Case note	MAXIS WF1	SNAP E&T Provider Handb
Exit participant from SNAP E&T program: Within 30 days of SNAP closure (unless open in retention) or 60 days of non-engagement or when a participant achieves employment. Participants may also elect to exit SNAP E&T At any time	WF1	SNAP E&T WF1 User Manus SNAP E&T Provider Handbo

^{*} Not a policy requirement; best practice