

## MFIP - ES POLICY

**DATE ISSUED:** May 26, 2010

**DATE REVISED:** February 17, 2016

**SUBJECT:** Extension Request Procedure

### PURPOSE

This Ramsey County Workforce Solutions policy outlines the full procedure for extension packet development, information exchange/transfer, extension review and communicating decisions regarding extension beyond the 60-month MFIP time limit.

### POLICY AND GUIDELINES

Any Participant who requests an extension will work with their Employment Counselor to complete an Extension Request Packet. Employment Counselors are responsible for walking Participant through the process and assisting in the gathering of documentation for the extension request review. Workforce Solutions will not pursue documentation for Participant assigned to an MFIP vendor agency. Documentation required for an extension request is the same type of information currently required for FSS qualification.

### PROCESS

The Extension Process Review process is:

1. Agency Initiates 48 Month Checklist	2. Face To Face Interview Completed At 54 <sup>th</sup> month	3. Extension packet sent to ERT by 5th day of 59th month	4. ERT decision made by end of 59 <sup>th</sup> month	5. If extended, transfer case to EXS; if denied, close case at Agency
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### PROCEDURES

The steps involved in creating an Extension Request Packet include:

#### 48 MONTH CHECKLIST

1. WFS MIS creates and distributes the Data Specialist Report (spreadsheet) between the 10<sup>th</sup> and 15<sup>th</sup> of the current month.
2. The Agency Data Specialist produces and distributes the list to counselors of all cases at 47 months to facilitate the Counselor's scheduling of a meeting to complete the 48 month checklist.
3. The Agency Data Specialist will review any new referrals of cases at 48-54 months to determine whether they have had a 48 month checklist completed. Cases without a 48 month checklist should be added to the 48 month checklist list given to counselors.
4. Upon receiving the 48 Month Checklist list, the Agency Counselor opens a WF1 local flag activity to indicate the initiation of the 48 Month Checklist process. The Counselor adds to the activity an Activity Status Sub-Type as 48MON.
5. The Counselor enters a WF1 case note to reflect that the 48 Month Checklist process has been initiated.

6. Agency Counselors with Participants on the 48 Month Checklist list schedule and meet with Participants to complete the 48 Month Checklist.
7. Once the 48 Month Checklist is completed with the Participant, the Counselor closes the activity.

#### **FACE TO FACE MEETING**

8. WFS MIS creates and distributes the Data Specialist Report (spreadsheet) between the 10<sup>th</sup> and 15<sup>th</sup> of the current month.
9. The Agency Data Specialist produces and distributes the list to Counselors of all cases at 54 months to facilitate the Counselor's scheduling of a meeting to complete the Face-To-Face meeting.
10. Upon receiving the 54 month list, the Counselor schedules a Face To Face meeting with the Participant.
11. The Counselor enters a WF1 case note to reflect that the Face To Face meeting is scheduled or attempts to schedule the meeting have been undertaken.
12. Once the Face To Face meeting has been completed, or if the Participant did not schedule or attend the meeting, the Counselor enters a WF1 case note to reflect the status of the Face To Face meeting.

#### **EXTENSION REQUEST PROCESS**

13. WFS MIS creates and distributes the Data Specialist Report (spreadsheet) between the 10<sup>th</sup> and 15<sup>th</sup> of the current month.
14. The Agency Data Specialist produces and distributes the list to Counselors of all cases at 58 months to facilitate the Counselor's scheduling of a meeting to complete the Extension Review Request if the Participant so wishes.
15. Upon receiving the 58 month list, the Counselor schedules a meeting with the Participant to discuss and complete the Extension Review Packet.
16. The Counselor completes and submits the Extension Review Packet to the Agency Data Specialist who then sends it by the 5<sup>th</sup> day of the 59<sup>th</sup> month to the Extension Services Employment Supervisor (see Step 20 below). Note: The case will stay active with Agency at this point, do not transfer or exit the case in WF1.
17. The Extension Review Packet includes:
  - a. Extension Decision Form (with top half completed)
  - b. Signed Release of Information Form
  - c. 48 Month Checklist
  - d. Face To Face Extension Interview Form
  - e. All unexpired documents supporting the extension category requested by the Participant.
  - f. Any documents showing non-compliance, such as NOITS or Status Updates within the previous 12 months.
18. The Agency Data Specialist sends an email to the Extension Services Supervisor and Extension Services Employment Guidance Counselor Aide (and cc the Counselor) to inform that the packet is being sent.
19. The Agency Data Specialist opens the WF1 Local Flag activity and adds to the activity an Activity Status Sub-Type of toERT for each case packet being sent for review.
20. The Agency Data Specialist sends the hard copy Extension Review Packet through the Courier to the Extension Services Supervisor at Workforce Solutions, Room 6700, 160 East Kellogg. Do not email the packet.
21. The Agency Counselor can later send additional documents via email to the Extension Services Employment Guidance Counselor Aide.

22. The Agency Data Specialist pulls from the Data Specialist Report a list of all of the agency's cases at 58 months, writes a general statement about status of each case regarding the request for an extension and sends the list to the Extension Services Employment Guidance Counselor Aide. The list can be sent with the packet or as a stand alone email. The Extension Services Employment Guidance Counselor Aide uses this list as a checklist for what is expected and received. The Agency Data Specialist uses the process of creating the updated list as a means to confirm that all cases at 58 months have been considered and appropriate action has been taken.

#### **EXTENSION PACKET REVIEW PROCESS AND DECISION**

23. The Extension Services Supervisor sends a "reply to all" email (see Step 18) to the Agency Data Specialist confirming the receipt of the Extension packet.
24. The Extension Review Team, a team from Workforce Solutions and CHS Financial Assistance Services, reviews the case and makes a decision by the end of the 59<sup>th</sup> month.
25. The Extension Services Employment Guidance Counselor Aide sends "reply to all" email (see Step 18 and Step 23) to notify, the Agency Counselor, and the Agency Data Specialist of the decision (cc Financial Worker).
26. The Extension Services Employment Guidance Counselor Aide case notes the extension decision in the participants WF1 record.

#### **60 MONTH ACTION**

27. For cases denied an extension, the Agency Counselor closes the Participant file at the end of the 60<sup>th</sup> month, using "Closed 60 months not extended" as the outcome.
28. The Agency Counselor case notes the case closure in WF1.
29. If the extended case has an active 2<sup>nd</sup> parent on the case, the Agency Counselor prepares a transfer file for that participant and sends to their Agency Data Specialist.
30. The Agency Data Specialist transfers the record to the Extension Services' Employment Guidance Counselor Aide in WF1, and then sends an email to the Extension Services' Employment Guidance Counselor Aide indicating that the 2<sup>nd</sup> parent case transfer file is being sent via courier and the record has been transferred in WF1. The Agency Data Specialist sends the transfer file to the Extension Services' Employment Guidance Counselor Aide.
31. Once the transfer file is received, the Extension Services' Employment Guidance Counselor Aide sends a reply email to the Agency Data Specialist confirming receipt of the transfer file.
32. The Agency Data Specialist transfers the WF1 record(s) that were approved for an extension to the Extension Services' Employment Guidance Counselor Aide at the end of the 60<sup>th</sup> month. The Agency Data Specialist then sends an email to the Extension Services' Employment Guidance Counselor Aide indicating which record(s) have been transferred in WF1.
33. For cases extended, once the case is assigned to EXS, the Extension Services Employment Guidance Counselor Aide preps the extension paperwork (per EDMS requirements) and submits the paperwork to be scanned.
34. The Extension Services Employment Guidance Counselor Aide opens the Local Flag activity with the correct initial Extension Decision activity subtype, closes the Local Flag "to ERT" activity, and assigns the case in WF1 and LF to an Employment Guidance Counselor.
35. For cases denied an extension, the Extension Services Employment Guidance Counselor Aide holds the extension packet for 6 months, in the event of an appeal; the Extension Services Employment Guidance Counselor Aide destroys the extension packet after 6 months if no (successful) appeal.

**SUPPORTING DOCUMENTS**

The Case Transfer Policy, the 48 Month Checklist, the Face To Face Extension Interview Form, the Extension Decision Form, the Request for Medical Information Form, and other materials can be found at: <https://www.ramseycounty.us/your-government/departments/economic-growth-and-community-investment/workforce-solutions/dwp-mfip>

**EFFECTIVE DATE:** February 17, 2016 - Kate Probert Fagundes, DWP/MFIP ES Division Manager

**CONTACT PERSON:** Your Agency's Lead Planner