

## 3.2.3 Pathway Development Tool Comprehensive Evaluation Updates

~~Revised on: July 1, 2021~~September 20, 2021

~~Effective July 1, 2021 staff will no longer use Part 4 (sanction reengagement) of the comprehensive evaluation.~~

*Legal References:*

- [RCW 74.08A.260](#)
- [RCW 74.08A.275](#)
- [RCW 74.08A.285](#)
- [RCW 74.12.410](#)
- [WAC 388-61-001](#)
- [WAC 388-310-0400](#)
- [WAC 388-310-0700](#)
- [WAC 388-310-0200](#)

~~Note: The DSHS Annual and Returner Updates will not be available until August 22, 2014.~~

~~The Comprehensive Evaluation section is divided into three separate sub-sections:~~

- ~~• Section 3.2.1 Comprehensive Evaluation describes the purpose and content of the CE and continuous activity planning.~~
- ~~• Section 3.2.2 Initial Comprehensive Evaluation describes how to create and complete an active CE.~~
- ~~• Section 3.2.3 Comprehensive Evaluation Updates describes how DSHS and WorkFirst partners update recipients' and returners' CEs. This section includes:~~
  - ~~• 3.2.3.1 When do we update an active comprehensive evaluation?~~
  - ~~• 3.2.3.2 What is included in a DSHS Annual Update to the comprehensive evaluation?~~
  - ~~• 3.2.3.3 What is included in a Sanction Re-engagement update to the comprehensive evaluation? (No longer valid as of July 1, 2021.)~~
  - ~~• 3.2.3.4 What is included in a short term returner update to the comprehensive evaluation?~~
  - ~~• 3.2.3.5 What is included in a mid term returner update to the comprehensive evaluation?~~
  - ~~• 3.2.3.6 What is included in an ESD partner Update to the comprehensive evaluation?~~
  - ~~• 3.2.3.7 What is included in a Commerce contractor update to the comprehensive evaluation?~~
  - ~~• 3.2.3.8 What is included in a community/technical college update to the comprehensive evaluation?~~
  - ~~• 3.2.3.9 What is included in a LEP Pathway Provider update to the comprehensive evaluation?~~
  - ~~• 3.2.3.10 Comprehensive Evaluation Updates Step by Step Guide~~

~~This WorkFirst Handbook (WFHB) section describes how to use the Pathway Development Tool to do a comprehensive evaluation and social service assessment with a WorkFirst participant. It covers:~~

- ~~• 3.2.3.1 What is the Pathway Development Tool (PDT)?~~
- ~~• 3.2.3.2 What is the PDT's structure and what topics does it cover?~~
- ~~• 3.2.3.3 Using How do I use the PDT to complete a comprehensive evaluation?~~
- ~~• 3.2.3.4 Using How do I use the PDT to complete a social service assessment?~~
- ~~• 3.2.3.5 How do I use the PDT Navigation section when developing an IRP?~~
- ~~• 3.2.3.6 How do I use the PDT to complete the annual updates?~~

- 3.2.3.7 How do I use the PDT for sanction reengagement, or for families who leave and return to TANF?
- 3.2.3.8 What are the referral and mandatory reporting requirements for pregnant dependent minors?
- 3.2.2.9 Pathway Development Tool - Step-by Step Guide

### 3.2.3.1 When do we update an active comprehensive evaluation? What is the Pathway Development Tool (PDT)?

The active initial CE is a living document that shows, in one place, what has been going on with the parent and his or her children through their TANF stay and as we hear back from partners and providers who have been working with the family.

Staff will update the initial active CE at the following times:

- ~~**DSHS Annual Update:** DSHS staff will do an annual CE update when the annual family violence and family planning screenings are due. All three functions can be completed by doing the DSHS CE annual update.~~
- ~~**Sanction Re-engagement:** DSHS staff will complete Part 4 of the active CE when a parent wants to start a sanction cure. (No longer valid as of July 1, 2021.)~~
- ~~**Short-term Returner:** DSHS staff will do the short-term returner CE update when a parent exits TANF/SFA and returns within six months.~~
- ~~**Mid-term Returner:** DSHS staff will do the mid-term returner CE update when a parent exits TANF/SFA and returns between 7-12 months.~~
- ~~**Partner Updates:** The WorkFirst partners (ESD staff, Commerce contractors, community and technical college staff and LEP Pathway Providers) will update the CE as parents achieve employment or educational milestones such as completing a resume, high school equivalency, or language gains or resolving a barrier to employment.~~

~~DSHS staff will update an active CE by opening the active CE and selecting the appropriate follow-up type. They can also update any portion of an active CE at any time at user discretion.~~

~~Partners will update an active CE by submitting changes to their designated update sections.~~

~~See the WorkFirst Comprehensive Evaluation Client Flow Chart for additional details about how we create the initial active CE and keep it updated.~~

The Pathway Development Tool (PDT) is an eJAS tool used to conduct WorkFirst comprehensive evaluations and social service assessments. The PDT provides a snapshot in time of what's going on with a participant, and their family, and their individual circumstances. It's used to gather information on to support which pathway and activities the participant will engage in will be most helpful to the participant and aids in shaping developing their Individual Responsibility Plan (IRP).

### 3.2.3.2 What is included in a DSHS Annual Update to the comprehensive evaluation? What is the PDT's structure and what topics does it cover?

~~The WFPS or WFSSS will open the active CE, select the Annual CE Update follow-up type. You will only be able to select the Annual CE update when Part 1 of the CE has been previously saved/finished. You will be required to save/finish Parts 2 and 3 during the Annual CE Update if you have not previously saved/finished those parts to ensure the entire CE has been completed within a year.~~

~~For a Part that has been previously saved/finished, you will complete the annual update scripts and prompts at the top of each section in Parts 2 and 3 of the active CE, the family violence section in Part 2 and the family planning question in the adult health section of Part 2. These scripts and prompts are intended as guidance for staff, not as~~

text that must be read to the parent verbatim. The important goal is to address each of these topics in whatever way staff feel comfortable, according to their skill and experience.

The prompts at the top of each section are geared to screen for emergencies, surface any changes over the past year and to complete the annual family violence and family planning screenings. The WFPS or WFSSS may also update other areas in Part 2 and Part 3 as they feel appropriate.

Save/finish Parts 2 and 3 of the CE when you have completed the DSHS Annual Update. Once that is done, the system will recognize that the family violence and family planning screenings have been completed and not display red notification to complete those on the Client Main Page.

The PDT is divided into various sections and topics to support a conversation between staff and participants, in order to determine the best engagement pathway for activity engagement. It is designed to allow for allow WorkFirst staff the flexibility around which topic the WorkFirst Worker staff can start with to select a starting topic when engaging the participant in discussion, and for the conversation to flow based on family needs and goals. The PDT includes the following sections to support WorkFirst engagement:

### Tracking Information

The first section of the tool allows staff to track specific information, including:

- Program
- Whether Status of the tool (complete or pending)
- Pending reason (when applicable)
- Whether Equal Access (EA) has been discussed/addressed
- Details of the EA Plan (when applicable)
- Social Service Assessment Type – *this field is only for use by WFSSS when conducting an assessment using the PDT (see WFHB 3.2.3.4X.X.X)*

**Note:** Staff cannot proceed with saving a PDT until the EA Plan fields are completed. If the participant does not need an EA Plan, staff must check the “Equal Access has been addressed” box, and note “N/A” in the “Describe Equal Access Plan” field.

Client Pathway Program: <span>WorkFirst</span>		<input type="radio"/> Tool Verified as Complete		Social Services Assessment Types - Choose all that apply:	
<input checked="" type="checkbox"/> Equal Access has been addressed		<input checked="" type="radio"/> Pending		<input type="checkbox"/> Admin/Support Services	
Describe Equal Access Plan:		Pending Reason: <span>In Process</span>		<input type="checkbox"/> Emotional Health	
<div>N/A [Last Updated on: 07/29/2021 at 13:57:57 PM by KGME300-MELISSA KENNEY]</div> <div>( 1851 of 2000 characters left)</div>				<input type="checkbox"/> Customized Assessment	
				<input type="checkbox"/> Substance Use	
				<input type="checkbox"/> Division of Child Support Safety Assessment	
				<input type="checkbox"/> Family Violence	
				<input type="checkbox"/> In Loco Parentis	
				<input type="checkbox"/> Learning Disabilities	
				<input type="checkbox"/> Pregnancy to Employment	
				<input type="checkbox"/> Parental Issue	
				<input type="checkbox"/> Refugee Employment Referral	
				<input type="checkbox"/> Health/Incapacity	
				<input type="checkbox"/> Sanction	
				<input type="checkbox"/> Teen Living Assessment	
<div>Save</div>					

### Personal Pathway Details

This section of the tool summarizes participant responses captured in the Personal Pathway, for participants who choose to complete fill out one. This information, when available, is used by WorkFirst staff to determine which topic to begin with in the PDT. For more information on how to use this information while completing a PDT, please see WFHB 3.2.2.3 and 3.2.2.4.

View Personal Pathway Details			
Personal Pathway Details			
Values	Goals	Strengths	Obstacles
Be more financially stable	Find a job that provides for my family	Creating or building things	Be able to afford safe and stable housing
To give back and contribute	To gain work experience	Communication	To have safe and stable housing
Taking care of my health	Connecting with family violence resources	Solving problems	Working with too many agencies right now
	Exploring resources to help with...	Organizing and planning	
	Exploring volunteering at my child's school or daycare		

Topics

This section includes topic categories for sStaff to discuss with the participant when completing a PDT. Each topic subsection includes the following:

- ~~Example script which~~Script with that suggested questions, discussion topics, and script to support and to guide and support staff in having a conversation with the participant on a topic. The example script is intended to be a jumping-offstarting point for the conversation. Staff may ask all or, some of these questions, or use formulate other appropriate questions of their own-their own questions in order to engage with the participant. The questions are open-ended, where the participant has the opportunity to do most of the talking. The questions are open-ended to support a conversation in which the participant has the opportunity to much of the talking. with the participantThey ,with-focus on strength and supports.
- ~~Freeform text fields which~~fields that WorkFirst ,that sStaff are to use to document the discussion with the participant on a topic. This format supports open-ended conversation, with the participant guiding the conversation.This format allows for open ended conversation to occur and for the participant to guide the conversation.
- For most topics, there are suggestions listed for thewhat type of information to document in the free from text box-(when applicable).
- A list of *indicators, strengths, needs/interests, and referrals* (below the free form text box). WorkFirst sStaff can select from.The workersStaff is to selects all options that apply to the participant's situation, based on the conversationwill. Staff are to discuss with the items selectedparticipant's which items they are selecting selected itemsin order andto engage in a transparent conversation around service, supports, -and-referrals, and goals.

See the example below (from the PDT Transportation topic section):

Transportation

Example Script:

- How do you and your family get around?
- What supports do you need for your transportation?
- What supports do you need to get where you need to go?

Document this type of information if it applies:

- Type(s)
- Back up/alternatives
- License/insurance/registration/tabs/fines
- Problems/repairs needed
- Safety belts/seats

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Select all that apply:

Indicator (I)

Strength (S)

Need/Interest (N)

Referral (R)

☐ Has vehicle and valid driver's license (S)
 ☐ No transportation available (I)

☐ Uses public transportation (I)
 ☐ Needs support services to stabilize (N)

☐ Uses ride share applications (I)
 ☐ Needs to obtain insurance (N)

☐ Gets rides from family and friends (I)
 ☐ Needs to obtain driver's license (N)

☐ Shares a vehicle (I)
 ☐ Needs to obtain registration/license tabs (N)

☐ Walks/rides bike (I)
 ☐ Needs help with cost of tolls/ferries/fees (N)

☐ Unreliable/unsafe vehicle (I)
 ☐ Referral to Social Services for transportation support (R)

☐ Suspended license (I)

Below are all topics included within the PDTT that supports a conversation with the participant:

TOPIC	DESCRIPTION & ITEMS OF NOTE
<u>Family</u>	<p><del>Supports a conversation with the participant regarding their family. Its E</del><u>Intended to explores the family’s current situation and what services and or supports are the participant may neededeed to engage in services, and/or what exemptions or deferrals that may be appropriate or needed.</u></p> <p>Includes the following subsections:</p> <ul style="list-style-type: none"> <li>• <u>Family – Includes a link for creating the mandatory “Family Planning Screening” (see WFHB 1.3).</u></li> <li>• <u>Pregnancy – Includes a field for pregnancy ‘due date’, pre-filled when applicable (information imported from ACES).</u></li> <li>• <u>Separate subsections based on age of child(ren) in the home:</u> <ul style="list-style-type: none"> <li>○ <u>Child 0-12 Months</u></li> <li>○ <u>Child 13-24 Months</u></li> <li>○ <u>Child 2-5 Years</u></li> <li>○ <u>Child 6-12 Years</u></li> <li>○ <u>Child 13+ Years</u></li> </ul> </li> </ul> <p><u>For the subsections based on child(ren) age – staff only complete subsections relevant to the family.</u><del>For the separate subsections based on the ages of the children in the home – staff only complete only those subsections relevant to the family.</del></p> <p><u><b>Example:</b> A participant has two children (ages 6 months and 5 years old). The worker reviews the general 'Family,' ‘Child 0-12 months,’ and ‘Child 2-5 Years’ subsections to complete the 'Family' topic section.</u><del>A participant has two children (ages 6 months &amp; 5 years old). The worker reviews the general ‘Family,’ ‘Child 0-12 months,’ and ‘Child 2-5 Years’ subsections to complete this section of the PDT with the participant.</del></p> <p><u><b>Example:</b> A participant is pregnant and has two children (ages 2 and &amp; 5 years old). The worker reviews the general ‘Family,’ ‘Pregnancy,’ and ‘Child 2-5 Years’ subsections to complete this ‘Family’ topic section.</u><del>section of the PDT with the participant. The conversation on regarding both children is documented in the ‘Child 2-5 Years’ subsection.</del></p>
<u>Employment &amp; Work Experience</u>	<del>Supports a s</del> <u>Supports a conversation with the participant regarding their e</u> Current employment circumstances and work history/experience.
<u>Education &amp; Training</u>	<del>E</del> <u>Supports a s conversation with the participant regarding their</u> education and training experience, along with related goals and interest in pursuing this as an engagement activity. It includes a field to capture the participant’s highest grade level completed.
<u>Financial Literacy</u>	<p><del>Supports a s conversation regarding financial literacy and if whether the participant has interest in related services and activities.</del><u>Financial literacy services and supports can provide families with the tools for a smoother transition from a benefit-based income to a wage-based income, and keep them from unknowingly entering into financially devastating credit arrangements. It is an essential element to a family achieving financial stability, self-sufficiency, and economic mobility.</u></p> <p><u><b>NOTE:</b> WorkFirst staff ask the participant if they would like a referral to money management training available in their local community. T—this is considered a life skill and is not a mandatory activity. Staff can find a list of resources that provide financial literacy programs at the Washington Department of Financial Institutions - Statewide Financial Education Class Calendar, and the Washington Asset Building Coalition website.</u></p>

<u>TOPIC</u>	<u>DESCRIPTION &amp; ITEMS OF NOTE</u>
<u>Family Violence</u>	Includes <b>mandatory</b> script and questions to support screening participants for family violence. See WFHB 6.5 for additional information and support in conducting these screenings with families.
<u>Substance Use</u>	Explores whether a referral to social services to assess and support the participant's emotional health and mental well-being is needed. See WFHB 3.2.1.8 and Chapter 6 for additional information. <del>Explores whether Supports as conversation regarding substance use, e</del> <del>Is xploring whether a referral to social services for a chemical dependency assessment and support is needed..?</del> See WFHB 3.2.1.8 and Chapter 6 for additional information and support.
<u>Emotional Health</u>	<del>Supports as conversation regarding emotional health and mental wellbeing, e</del> <del>Is xploring whether a</del> Explores whether a referral to social services to assess and support the family's health circumstances, or if deferral/exemption is appropriate. See WFHB 3.2.1.8 and Chapter 6 for additional information. <del>Explores whether a referral to social services for assessment and/or support for emotional health and mental well-being may be needed..?</del> See WFHB 3.2.1.8 and Chapter 6 for additional information and support.
<u>Medical/Health</u>	<del>Supports as conversation with the participant regarding their family's health eircumstances, e</del> <del>Is xploring whether a</del> Explores whether a referral to social services regarding their family's health circumstances for assessment and/or support <del>may be</del> needed, or if deferral and exemption is appropriate.?. See WFHB 3.2.1.8 and Chapter 6 for additional information and support.  <b>NOTE:</b> When a participant voluntarily provides information about HIV/AIDS/STD issues that could interfere with WorkFirst activities, use this section to document that information. <del>this section of the PDT can be leveraged to capture that information.</del> The HIV/AIDS/STD note type is also available (see WFHB 1.6.4).
<u>Housing</u>	Opens up an opportunity to talk about the family's housing situation. Supports determining how their housing situation may impact the participant's engagement in activities <del>Supports a s conversation regarding the participant's current living and housing situation, exploring whether their</del> <del>Evaluates whether</del> <del>Is the family is is in</del> <del>unstable housing or is homeless, and needs a referral to housing/homelessness resourcees in their community.?</del>
<u>Transportation</u>	<del>Supports as conversation regarding</del> <del>What is the</del> Examines what the participant's current means of getting around is.?. Opens up a conversation on what type of transportation support services are needed for activity engagement. <del>It's, intended to open up a conversation around what type of transportation supports may be needed to support activity engagement.</del>
<u>Legal Issues</u>	<del>Supports as conversation regarding</del> Explores any legal issues the participant is <del>may be</del> facing <del>which</del> that could affect <del>impact</del> activity engagement and/or employment opportunities.
<u>Other Agencies</u>	Allows sStaff to discuss and document <del>what any</del> agencies or programs the participant is <del>may</del> already be engaged with.

### Navigation

This section, nested in the *Topics* list, supports WorkFirst sStaff in having a discussion with the participant on engagement pathway options. It includes:

- ~~Check-boxes for WorkFirst sStaff to indicated~~ which activities the participant ~~is~~ ~~will be referred to,~~ to, based on the conversation.
- A free-form text field to capture additional notes or discussion items.
- ~~A free form text box for WorkFirst Sstaff to capture any additional notes or discussion items.~~



- A summary of all of the indicators, strengths, needs/interests, and referrals selected from each topic section. This information is displayed to support engagement pathway discussion, and to remind sStaff of what referrals need to be offered/made.

**Navigation**  
**WorkFirst Activities referred to:**

☐ ESD Job Search
☐ Unsubsidized Employment
☐ Issue Resolution
☐ 3rd Trimester Deferral

☐ Commerce Work Programs
☐ Life Skills
☐ Exempt for Barriers
☐ Choosing Infant/Toddler Exemption

☐ SBCTC Education & Training
☐ Parental Education
☐ Two-Parent Not Required to Participate
☐ Referral to Social Services

☐ LEP Pathway
☐ Volunteering

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Indicator	Strength	Need/Interest	Referral
Felony convictions	Child(ren) are doing well (0-12 months)	Interested in home visiting or parent education (child 0-12 months)	Referral to Women, Infants, and Children (WIC) (child 0-12 months)
No family violence concerns disclosed at this time	Currently employed	Opting for Infant Exemption (child 0-12 months)	
No medical/health concerns disclosed at this time	Completed some college	Interested in pursuing education	
No emotional health concerns disclosed at this time	Maintaining sobriety		

### 3.2.3.3 What is included in a Sanction Re-engagement update to the comprehensive evaluation? (No longer valid as of July 1, 2021.) How do I uUsing the PDT to complete a comprehensive evaluation?:-

~~The WFPS or WFSSS will open the active CE, select the Sanction Re-engagement follow up type and ask the six questions that focus on how the parent will successfully participate in WorkFirst. The script at the end of the section screens for any issues that the parent may have forgotten to mention during the interview that might affect his or her ability to participate. You will not need to use this script for a NCS re-applicant as they will also be completing or updating the rest of their CE as part of their intake process.~~

~~Save/finish Part 4 of the CE when you have completed the sanction re-engagement update. You will be able to find the results of previous sanction re-engagement updates in the sanction re-engagement history.~~

CSD:Thes goal is for WorkFirst Sstaff to do thorough comprehensive evaluations at the initial intake for participants approved or likely to be approved for TANF (see WFHB 3.2.1.8). This allows WorkFirst sStaff to engage participants in services that make sense based on the family's circumstances, strengths, desires, and goals.

WorkFirst staff FPS are to leverage use anyutilizes information gathered from the **Personal Pathway** to guide which topics to start with during the comprehensive evaluation. In addition, information collected during the financial intake issould be also used as a launching points during the PDT discussion -,to supporting a fluid and meaningful conversation with the participant, and avoid them needing to re-tell their story.

**Example:** During financial intake, an applicant mentions they didn't graduate from high school. The WFPS begins the conversation on the PDT 'Education & Training' topic by referring back to their discussion during the financial intake. They ask the participant to provide information around their experience in school.  
During financial intake, an applicant mentions that they didn't graduate from high school. The WFPS begins the PDT conversation on the **Education and Training** topic by referring back to their discussion during the financial intake, and asking the participant to provide more details around their experience in school.

There are many topics whichtopics that CSD isare legally required to be covered as part of theisduring the comprehensive evaluation process. ThoseRequired topics are **bolded** in the *Topics* table in WFHB 3.2.3.2. They'se

~~are-They-a're marked with an asterisk [\*] within eJAS. It should be the goal of staff to touch upon all topics included in the PDT, leveraging a participant's *Personal Pathway Details* to drive the conversation. It should be the goal of staff to touch upon all topics included in the PDT, where possible, when doing a comprehensive evaluation— whenever available, leveraging a participant's *Personal Pathway Details* to drive the conversation, if available.~~

~~After each *Topica* section of the PDT is reviewed, information documented, and necessary selections made in the indicators, strengths, needs/interests and referrals selections made, WorkFirst staff must save the section before movingproceeding to the next topic. Once all topics are reviewed with the participant, WorkFirst Staff are tmust complete the *Navigation* section by:~~

- ~~• Reviewing the participant's indicators, strengths, needs/interests, and referrals; summarized in this section.~~
- ~~• Discussing engagement pathway options and indicating which WorkFirst activity the participant would like to engage in.~~
- ~~• Documenting the discussion in the free from text fieldbox provided in the section.~~

~~Once the *Navigation* section is complete, WorkFirst staff can finalize a PDT by marking *Tool Verified as Complete* and selecting *save*. See WFHB 3.2.3.8 for additional support in using the PDT *Navigation* section. :~~

**Note:** A PDT cannot be finalized until all legally required, mandatory topics are reviewed. A mandatory topic is not considered complete until free form text and at least one of the *indicators, strengths, needs/interests, and referrals* is checked. A PDT can'teannot be finalized until all legally required, mandatory topics are reviewed. A mandatory topic is not considered complete until free form text is entered into its section, and at least one of its *indicators, strengths, needs/interests, and referrals* is checked.

#### **Immediate Pregnancy to Employment AssessmentSocial Service Referral Option:**

~~For pParticipants who require a Pregnancy to Employment to-assessment or have an urgent/emergent issue, an immediate referral may be offered to social services may be offeredis available for assessment. TIn thiese scenarios, the WFPS may start -completes as many parts of the PDT as able to -, pend and saves the tool, prior to transitioning the participant to a WFSSS. WFSSS are to-will discuss and complete any remaining elements of the PDT; alongside while as part of completing their assessment.~~

#### **Immediate Urgent & Emergent Issue Response & Referral:**

~~An urgent or emergent issue may come up while working through the financial intake, Personal Pathway responses, or when discussing a given topic within the PDT with a participant. It can be difficult to determine of the issue requires immediate social service staff support.~~

~~If, during the conversation with the participant,; it's apparent clear that an urgent or emergent issue exists, WorkFirst sStaff -may useare advised to pause and utilize the **Customer-Driven Severity Scale** in order to determine if an immediate offer of referral to social service staff is for assessment and support is needed. This tool supports this discussion by allowing the participant to make the decision around onabout whether their issue is urgent or emergent. No m~~

~~If the participant decides they would like a social service supportT, the WFPS areis to offer the participant an immediate referral to a WFSSS for support if the participant decides they would like social service support. In thiese situations, the WFPS should complete as many parts of the PDT as able to possible, pend and save the tool, prior to transitioning the participant to a WFSSS. Medical verification is not required to make thisan initial referral for assessment. WFSSS are to discuss and complete any remaining elements of the PDT alongside while completing their assessment.~~

~~C when the participant declines an immediate referral to social services for an assessmentOtherwise,~~

**NOTE:** When the parent indicates they have been thinking about ending their life, an immediate intervention, such as a referral to a crisis line, is required.

#### **General Issue Resolution Referrals to Social Services:**

~~If the during the comprehensive evaluation, the participant indicates possible issues (e.g. chemical dependency or mental health) that may affect their ability to fully engage in employment and training activities, referral to social~~



services may still be necessary (*Issue Resolution* pathway). For these referrals, medical verification is requested and obtained from the participant prior to the WFSSS engaging with the participant and/or determining who should carry the case. If as a result of completing the comprehensive evaluation in the PDT, there are indications of possible issues (e.g. chemical dependency or mental health) that which may impact affect the participant's ability to fully engage in employment and training activities, referral to social services may still be necessary (*Issue Resolution* pathway). For these referrals, medical verification is to should be requested and obtained from the participant prior to the WFSSS engaging with the participant and/or determining if whether social service staff should carry the case.

While it isn't mandatory to refer for a chemical dependency or mental health assessment if the participant is in treatment, staff should consider and offer a social service referral. This allows the participant to explore the situation with a WFSSS and receive additional information to develop a more effective IRP.

It isn't necessary While it isn't mandatory to refer for a chemical dependency or mental health assessment if the participant is in treatment, .., but sStaff should still consider and offer making a social service referral so the participant can explore the situation with a WFSSS and getreceive additional information to develop a more effective IRP.

not carry.

### 3.2.3.4 What is included in a short-term returner update to the comprehensive evaluation? How do I uUsing the PDT to complete a social service assessment?

The WFPS or WFSSS will open the active CE, select the Returner 0-6 Months follow-up type and complete:

- Parts 1 of the active CE to screen for emergencies.
- The returner questions to find out more about why the parent returned to TANF.
- Part 2 of the active CE if it has not been previously saved/finished. If Part 2 has been previously saved/finished, you only need to complete:
  - The family violence section in Part 2 to complete a family violence screening.
  - The family planning question in Part 2 to complete a family planning screening.

The WFPS or WFSSS may also update other areas in Part 2 and Part 3 that appear relevant based on the conversation with the parent.

Save/finish Parts 1 and 2 of the CE when you have completed the short-term returner update. You will also want to save/finish part 3 if you made any updates to that part.

The PDT also supports WFSSS in completing social service assessments. Three key PDT features support seamless assessments: Three key PDT features assist WFSSS in conducting supported and seamless assessments:

- **Social Service Assessment Type** – Allows WFSSS to indicate which type of assessment they are doingconducting. It is only for use by WFSSS.
- **Ability to pend the PDT for WFSSS use** – Allows WFPS to 'pend' the PDT if one of theif following assessments is required/needed. ÷
- **a Pregnancy to Employment assessment**  
an t, immediate referral forfor issue resolution social service assessmentassessment and referral , or a 'Resolving Issues' pathway referral Note: is required. This allows for the PDT that a WFPS starts; to be continued, built upon, and finalized by the WFSSS.
- \_\_\_\_\_
- **Ability to copy over a finalized PDT** – If a participant's PDT is already finalized, the WFSSS can use the 'copy over' feature to do their assessment.

If a participant who is referred to a WFSSS for assessment has a PDT already finalized, the WFSSS can use the 'copy over' feature in order to conduct their assessment. This allows them to bypass the PDT restrictions around covering mandatory comprehensive evaluation topics.

**Note:** When a participant is referred to a WFSSS receives a participant with a pended PDT, the WFSSS is required to complete any remaining elements of that PDT with the participant while conducting the assessment and finalize the tool by reviewing the *Navigation* section with the participant.

For additional information and support in conducting social service assessments, see WFHB Chapters-5.1 & Chapter 6.

### 3.2.3.5 What is included in a mid-term returner update to the comprehensive evaluation? How do I use the PDT Navigation section when developing an IRP?;

The WFPS or WFSSS will open the active CE, select the Returner 7-12 Months follow-up type. You will only be able to select the Returner 7-12 Months CE update when Part 1 of the CE has been previously saved/finished. You will be required to save/finish Parts 2 and 3 during the Mid-term Returner Update if you have not previously saved/finished those parts to ensure we are getting a good picture of the parent's situation.

For a Part that has been previously saved/finished, you will complete the 7-12 returner prompts at the top of each section in Parts 2 and 3 of the active CE, the family violence screening in Part 2 and the family planning question in the adult health section of Part 2. The scripts and prompts will be very similar to those used in the Annual CE update with a focus on what has changed since the parent left TANF as well as screening for family violence or other emergencies, as well as family planning.

As with any CE update, the WFPS or WFSSS may also update other areas in Part 2 and Part 3 that appear relevant based on the conversation with the parent. The scripts and prompts are intended to guide an open-ended conversation that is conducive to conducting a motivational interview with a parent.

Save/finish Parts 2 and 3 of the CE when you have completed the mid-term returner update. Once that is done, the system will recognize that the family violence and family planning screenings have been completed and not display red notification to complete those on the Client Main Page.

The PDT *Navigation* section supports staff in discussing with the participant engagement pathway options and developing the IRP. WorkFirst staff review the summary of *indicators, strengths, needs/interests, and referrals* and work with the participant to determine what activities to engage in. WorkFirst staff review the summary of *indicators, strengths, needs/interests, and referrals* and, based on that information, work with the participant to determine which activities the participant is to will engage in. Refer to WFHB 3.2.1.10 for guidance on engagement pathways, and WFHB 3.3.1 for guidance on IRP development.

Once an engagement pathway has been agreed to, WorkFirst staff indicate what activities the participant is engaging in by checking boxes under the *WorkFirst Activities referred to* area of the *Navigation* section, and documenting the discussion in the free form text field.

Once an engagement pathway has been agreed to, WorkFirst staff indicate in the PDT what activities the participant will be engaging in within the PDT by checking the appropriate boxes under the '*WorkFirst Activities referred to*' area of the *Navigation* section, and documenting the discussion in the provided free form text box.

### 3.2.3.6 What is included in an ESD partner Update to the comprehensive evaluation? How do I use the PDT to complete the annual updates?;

Employment Security coaches will provide the following information upon referral to Career Scope and updates as necessary. See WFHB 4.1 for more information.

- ~~SECTION 1: Employment Skills Assessment Summary~~—includes information as related to the participant’s Employment Skills Assessment (ESA). ~~The ESA covers their readiness to seek and accept employment, career goals and current skills and abilities.~~
- ~~SECTION 2: Assets Inventory~~—Provides completion dates for:
  - ~~Assessment (ESA)~~
  - ~~Employment Assets~~
    - ~~Master Application~~
    - ~~Resume~~
    - ~~Interviewing Skills~~
    - ~~60 Second Commercial~~
    - ~~Labor Market Research~~

~~SECTION 3: Update Notes for Section 1 and 2 as necessary.~~

WorkFirst Staff must do an annual update of a participant’s comprehensive evaluation and or social service assessment with participants. eJAS notifies staff of when mandatory screenings are required —specifically the (-annual family violence and family planning screenings). If it has been over a year since a PDT was completed with the participant at the time of these annual screenings, staff are to must complete a new PDT with the participant. The family planning and family violence screenings are accessible to WorkFirst staff through the **Family** and **Family Violence** topic sections of the PDT.

**NOTE:**

- ~~The PDT *copy over* feature~~~~unction~~ is only available for up to 12 months.
- When using the *copy over* feature, WorkFirst Staff need to select this option when they first enter a new tool the PDT (before hitting *save*).
- eJAS will recognizes once the family violence and family planning screenings have been completed and will no longer displays a notification on the Client Main Page.

### 3.2.3.7 What is included in a community/technical college update to the comprehensive evaluation? How do I useUsing the PDT for sanction reengagement, or for families who leave and return to TANF?;

~~When the user opens the community/technical college update section in the Comprehensive Evaluation, they will have access to any Employment and Training (E & T) plan for that student from the E & T menu. In the selected E & T plan, staff can enter information into the “Education Milestones “section (which follows the “Progress Notes” section).~~

~~There are four education milestones:~~

- ~~High School Diploma~~
- ~~High School Equivalency~~
- ~~I-BEST Completion~~
- ~~Certificate or Degree~~

~~There is a date field and text box following each milestone, where additional information such as completion date and type of certificate or degree can be entered. The dates and text may be modified until the plan is closed.~~

For familiesparticipants whom are in non-compliance sanction and wish to reengage in the program, or whom left TANF and then return to the program, staff are required to complete a new comprehensive evaluation with the

participant, using the PDT. This includes households that were ~~who are~~ terminated from TANF due to non-compliance sanction (see WFHB 3.5.3).

~~For participant's who had a PDT done within the last 12-months, the PDT *copy over* feature~~unction~~ can be used so staff can build off the last conversation had with the participant. Staff who use this function are to must review/update all topic sections with the participant and complete the *Navigation* section based on the conversation. For participant's who had a PDT done within the last 12 months, the PDT *copy over* function can be leveraged used so that staff can build off the last conversation which was had with the participant. In these circumstances, if a PDT was completed within the last 12 months, staff are to use the *copy over* tool and review/update all topic sections with the participant and complete the *Navigation* section based on the conversation.~~

~~If a PDT on file is older than 12-months, or there is no't one on file, WorkFirst Staff are to must complete a new PDT with the participant.~~

**NOTE:** The PDT "*copy over*" feature~~unction~~ is only available for up to 12 months.

### 3.2.3.8 ~~What is included in a Commerce contractor update to the comprehensive evaluation?~~ What is-are the rReferral and mandatory reporting requirements for pregnant dependent minors.

~~When the user accesses the Commerce Partner Updates link from the CE Main Page, the user will be taken to the Commerce Plan Exit History summary page. The Commerce Plan Exit History summary page will allow for the exit section of closed Community Jobs Individual Development Plans and Community Works Plans in which the parent has been enrolled to be viewed. The page will also display Community Works Plans in which the parent has been enrolled to be viewed. Note: Only plans created on or after 3/21/14 will be viewable in this section.~~

~~The plans will be viewable in the following order:~~

~~To view the detailed Exit section of the plan, select the hyperlinked date that appears under 'Update Date' on the Commerce Plan Exit History summary page. Please see the example below: (If a confidential Exit Category was selected by the Commerce Contractor, the Exit Reason and Explanation for Exit will only be viewable by DSHS).~~

~~1. The Individual Development Plans and Community Works Plans will display in descending order by the most recent Creation Date.~~

~~a. The following exit information will be displayed for each closed Individual Development Plan, Job Connection Career plan, and Community Works Plan-~~

- ~~• Exit Date~~
- ~~• Exit Category~~
- ~~• Exit Reason~~
- ~~• Explanation of Exit~~
- ~~• Unsubsidized Employment Start Date, if applicable~~

#### ~~2. IDP and CW Exit History~~

Update Date	Exit Date	Exit Reason	User	Reopened Date
<a href="#">03/01/2014</a>	02/12/2014	PT UNSUBSIDIZED EMPLOYMENT	JOYCE BEEBE	
<a href="#">02/12/2014</a>	02/12/2014	PT UNSUBSIDIZED EMPLOYMENT	JOYCE BEEBE	

~~?~~

WorkFirst staff offer a referral to First Steps for pregnant dependant minors (see WFHB 5.1.17 for more information).

**Note:** First Steps helps low-income pregnant individuals get the health and social services they may need and covers a variety of services for pregnant individuals and their infants.

CSD sStaff must follow the policy for mandatory reporting of suspected child abuse, neglect or child rape in the EA-Z Manual, Child Abuse and Neglect Reporting when a participant~~rent~~ reports a pregnant minor dependent child. Under the mandatory reporting policy:

Staff will offer a referral to First Steps for the pregnant minor (see WFHB 5.1.17 for more information).

**Note:** First Steps helps low income pregnant individuals get the health and social services they may need and covers a variety of services for pregnant individuals and their infants.

- Staff should only n't report child rape to law enforcement if ~~unless we know~~ the age of the father is known. ∴ Staff are no't required to ask the age of the father.
- If the participant~~ent~~ volunteers ~~that~~ information, and we become aware ~~that~~ it meets the criteria of child rape, and a law enforcement referral is required.
- Once the child is born, more information about the age and identity of the father may become available as part of the child support enforcement process.

### 3.2.3.9 What is included in a LEP Pathway Provider update to the comprehensive evaluation? Pathway Development Tool - Step-by Step Guide

The LEP Pathway Provider is required to update service milestones in the CE by checking the appropriate box and entering free form text. eJAS will send an e message to the WorkFirst worker of record when an LEP Pathway Provider update is done and eJAS notes will auto-populate with a summary of the update.

#### Using the PDT to complete a comprehensive evaluation at financial intake, (WorkFirst Sstaff):

1. Complete appropriate *Tracking Information* at the beginning of the PDT.
2. Reviews the PDT *Personal Pathway Details* summary with the participant, if applicable, and uses that information to guide which topic to begin ~~with in~~ with in the PDT *Topics* section.
3. Reviews PDT *Topics* with the participant.
4. Complete the PDT *Navigation* section, determining engagement pathway and appropriate IRP activities with the participant. Leverage *Personal Pathway Details* summary, if applicable, to support this discussion.
5. Document comprehensive evaluation discussion in eJAS.

#### **NOTE:** The WFPS may not be able to complete the comprehensive evaluation at the intake appointment ,if:-

- A Pregnancy to Employment assessment is needed. In these circumstances, offer an immediate referral to social services.
- The participant is experiencing an urgent or emergent issue. In these circumstances, discuss the severity of the situation with the participant ~~leveraging~~utilizing. Offer an immediate referral to social services for support, based on the discussion and interest of the participant.

#### **NOTE:**

If the participant didn't complete the comprehensive evaluation immediately following financial intake: Schedule an appointment use the AP component with end date to match the scheduled appointment, ~~p~~Providing e adequate advance notice for the participant to complete this process



- Send either the ACES General Appointment Letter (50-05) or eJAS Appointment Letter using “WF PDT Appt” canned text in Barcode

~~• Provide adequate advance notice for the participant to complete this process~~

~~The participant can’t complete the comprehensive evaluation at the time of intake. In these circumstances, ask the participant when would be a good time to finish and schedule an appointment by sending an appointment letter using the the eJAS AP component and IRP Template, ACES General Appointment Letter (50-05), or eJAS Appointment Letter. Allow 10-day notice for the participant to complete this process.~~

~~In both of these scenarios, if participant desires an immediate referral, attempt to complete as Topics within the PDT prior to referral, and pend the PDT Letter~~

~~**Completes the PDT Navigation section, determining engagement pathway and appropriate IRP activities with the participant. Leverage Personal Pathway Details summary, if applicable, to support this discussion.**~~

~~**Document comprehensive evaluation discussion in eJAS.**~~

**NOTE:-If the participant can’t complete the comprehensive evaluation immediately following financial intake:**

- Schedule an appointment using the AP component with an end date to match the scheduled appointment, providing adequate advance notice for the participant to complete this process
- Send either the ACES General Appointment Letter (50-05) or eJAS Appointment Letter using “WF PDT Appt” canned text in Barcode

**Using the PDT to complete a comprehensive evaluationsocial service assessment, -(WFSSS):**

1. Complete the appropriate *Tracking Information* at the beginning of the PDT (*Social Service Assessment Type*).
2. Review ~~the pended~~existing PDT content with the participant, including any *Personal Pathway Details*, if applicable.
3. Reviews PDT *Topics* with the participant ~~which~~participant that are pertinent to the assessment.
4. Completes any additional PDT *Topics* ~~that~~the WFPS was not able to cover with the participant.
5. Completes the PDT *Navigation* section, determining engagement pathway and appropriate IRP activities with the participant.
6. Documents the social service assessment in eJAS.

## **Comprehensive Evaluation Updates—Step-by-Step Guide**

1. ~~The WFPS or WFSSS will update the comprehensive evaluation for parents who exit and return within one year, to do the annual CE update or start a sanction cure as follows:~~
  - a. ~~Open the active CE and select the follow up type~~
  - b. ~~Complete the mandatory parts, scripts, prompts, questions and sections for that type of update,~~
  - c. ~~Update other sections of the active CE that appear relevant~~
  - d. ~~Save/finish all Parts of the CE that have updated material.~~
2. ~~The WFPS or WFSSS can also update an active CE at any time, and save/finish any amended Part of the CE.~~

- ~~3. WorkFirst partners will update their designated sections of the active CE as parents achieve employment or educational milestones.~~

## Resources

### Related WorkFirst Handbook Sections

- 1.2 Required Participation
- 1.6 Required Documentation
- 3.1 Overview (Tools)
- 3.2.1 Comprehensive Evaluation
- 3.2.2 Personal Pathway
- 3.3.1 Individual Responsibility Plan
- 3.4 Case Staffing
- 3.5.1 Entering Sanction & Non-Compliance Sanction
- 5.1 Pregnancy to Employment
- 6.2 Assessments

### Forms & Other Resources

- Customer-Driven Severity Scale – *only accessible to CSD staff*
- ~~— WorkFirst Website~~
- Personal Pathway (DSHS 11-154)
- WorkFirst Partner Directory – *only accessible to CSD staff*
- WorkFirst Website
- ~~• Customer-Driven Severity Scale – *only accessible to CSD staff*~~
- ~~— Personal Pathway (DSHS 11-154)~~
- ~~— Customer-Driven Severity Scale~~
- ~~— WorkFirst Partner Directory~~
- ~~• WorkFirst Comprehensive Evaluation Referral Criteria~~
- ~~• WorkFirst Comprehensive Evaluation Documentation Guidelines~~
- ~~• WorkFirst Comprehensive Evaluation Flow Chart~~
- ~~• WorkFirst Comprehensive Evaluation Client Flow Chart~~
- ~~— WorkFirst Website~~