

WFHB

3.2.3.3 How do I use the PDT to complete a comprehensive evaluation?

The goal is for WorkFirst staff 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 staff to engage participants in services that make sense based on the family's circumstances, strengths, desires, and goals.

WorkFirst staff use any information gathered from the *Personal Pathway* to guide which topics to start with during the comprehensive evaluation. Information collected during the financial intake is also used as launching points during the PDT discussion - 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.

There are many topics that are legally required to be covered during the comprehensive evaluation. Required topics are **bolded** in the *Topics* table in [WFHB 3.2.3.2](#). They'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.

After each *Topic* section is reviewed, information documented, and *indicators, strengths, needs/interests and referrals* selections made, WorkFirst staff must *save* the section before moving to the next topic. Once all topics are reviewed with the participant, WorkFirst Staff must complete the *Navigation* section by:

- Reviewing the participant's *indicators, strengths, needs/interests, and referrals*.
- Discussing engagement pathway options and indicating which WorkFirst activity the participant would like to engage in.
- Documenting the discussion in the free form text field.

Once the *Navigation* section is complete, WorkFirst staff 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.

Social Service Referral Option:

For participants who require a Pregnancy to Employment assessment or have an urgent/emergent issue, an immediate referral to social services is available. The WFPS may start the PDT [and](#)

complete as much as possible prior to transitioning the participant to a WFSSS. The WFPS should complete as much of the PDT as possible.

If it is determined that an Pregnancy to Employment or urgent/emergent assessment is needed, the In these situations, the -WFPS will use include information obtained during the financial eligibility portion of the interview as a jumping off point to further discuss the familiesfamily's circumstances. At the point which an assessment is determined as needed, the WFPS documents all information shared and any information shared during the comprehensive evaluation in the PDT up to thate point that it is determined that an assessment is needed, -and document and saves it in theand pends the PDT before transitioning the participant to a WFSSS.

This allows the WFSSS to review so that information the customers already shared (so they don't do not have to repeat themselves). The WFSSS will review, discuss, and complete the PDT as part of completing their assessment, -and -then develop the IRP.

If during the conversation with the participant, it's clear an urgent or emergent issue exists, WorkFirst staff use the **Customer-Driven Severity Scale** to determine if an immediate offer of referral to social service staff is needed. This tool supports discussion **by allowing the participant to make the decision** on whether their issue is urgent or emergent. No medical verification is required to make an initial referral for assessment.

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.

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.

3.2.3.4 How do I use the PDT to complete a social service assessment?

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

- **Social Service Assessment Type** – *Allows WFSSS to indicate which type of assessment they are doing. It is only for use by WFSSS.*
- **Ability to pend the PDT for WFSSS use** – *Allows WFPS to 'pend' the PDT if assessment is needed. This allows the PDT a WFPS starts to be continued, built upon, and finalized by the WFSSS. If completing the PDT by phone, the WFSSS should explain to the participant that they are reviewing the case so they participant doesn't have to repeat themselves.*
- **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.*

NOTE: When a participant is referred to a WFSSS 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 and complete the IRP.
If completing the IRP by phone, utilizing the WorkFirst Partner Directory.

For additional information and support in conducting social service assessments,
see [WFHB 5.1](#) & [Chapter 6](#).

