3.2.3 Pathway Development Tool

Revised on: September 20, 2021

Effective November 15, 2021, the use of the Personal Pathway tool is suspended until further notice.

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

This WorkFirst Handbook (WFHB) section describes how to use the Pathway Development Tool. It covers:

- 3.2.3.1 What is the Pathway Development Tool (PDT)?
- 3.2.3.2 What is the PDT structure and what topics does it cover?
- 3.2.3.3 How do I use the PDT to complete a comprehensive evaluation?
- 3.2.3.4 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 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?
- 3.2.3.9 Pathway Development Tool - Step-by Step Guide

3.2.3.1 What is the Pathway Development Tool (PDT)?

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, their family, and their individual circumstances. It's used to gather information on what activities will be most helpful to the participant and aids in developing their Individual Responsibility Plan (IRP).

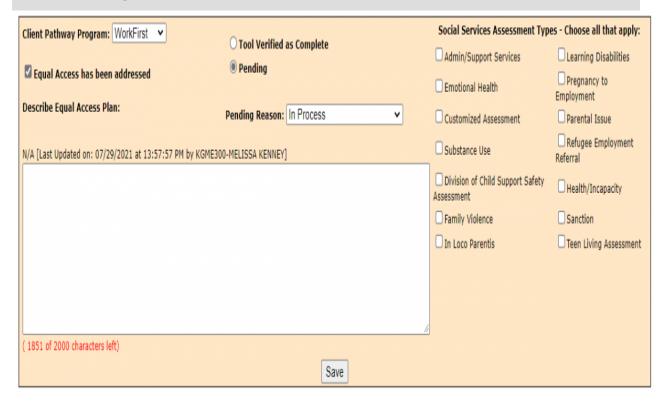## 3.2.3.2 What is the PDT structure and what topics does it cover?

The PDT is divided into various sections and topics to support a conversation between staff and participants to determine the best engagement pathway. It's designed to allow WorkFirst staff the flexibility 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:

Tracking Information

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

- Program
- Status of the tool (complete or pending)
- Pending reason (when applicable)
- Equal Access (EA) 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 3.2.3.4)*

Note: Staff can't proceed with saving a PDT until the EA Plan fields are completed. If the participant doesn't 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: WorkFirst ⌄

☑ Equal Access has been addressed

Describe Equal Access Plan:

N/A [Last Updated on: 07/29/2021 at 13:57:57 PM by KGME300-MELISSA KENNEY]

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○ Tool Verified as Complete

◉ Pending

Pending Reason: In Process ⌄

Save

Social Services Assessment Types - Choose all that apply:

☐ Admin/Support Services   ☐ Learning Disabilities

☐ Emotional Health   ☐ Pregnancy to Employment

☐ Customized Assessment   ☐ Parental Issue

☐ Substance Use   ☐ Refugee Employment Referral

☐ Division of Child Support Safety Assessment   ☐ Health/Incapacity

☐ Family Violence   ☐ Sanction

☐ In Loco Parentis   ☐ Teen Living Assessment

Personal Pathway Details

This section summarizes participant responses captured in the Personal Pathway, for participants who choose to complete 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 staff to discuss with the participant. Each topic subsection includes the following:

- **Example script** with suggested questions to guide staff in having a conversation with the participant on a topic. The script is a starting point for the conversation. Staff may ask all or some of the questions, or use other appropriate questions of their own to engage with the participant. The questions are open-ended, where the participant has the opportunity to do most of the talking. They focus on strength and supports.

- **Freeform text fields** that WorkFirst staff use to document the discussion with the participant on a topic. This format supports open-ended conversation, with the participant guiding the conversation.

- For most topics, there are suggestions listed for the type of information to **document** in the free from text field.

- A list of *indicators, strengths, needs/interests, and referrals (below the free form text box).* WorkFirst staff select all options that apply to the participant, based on the conversation. Staff discuss the items selected and engage in a conversation around service, supports, referrals, and goals.

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

Topics:
- Family *
- Employment & Work Experience *
- Education & Training *
- Financial Literacy *
- Family Violence *
- Substance Use *
- Emotional Health *
- Medical/Health
- Housing
- Transportation
- Legal Issues
- Other Agencies
- Navigation *

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 PDT:

TOPIC	DESCRIPTION & ITEMS OF NOTE

Family	Explores the family's current situation and what services or supports are needed, and/or what exemptions or deferrals may be appropriate. Includes the following subsections:
	
	 • Family – Includes a link for creating the mandatory *Family Planning Screening* (see WFHB 1.3).
	
	 • Pregnancy – Includes a field for pregnancy *due date*, pre-filled when applicable (from ACES).
	
	 • Separate subsections based on age of child(ren) in the home:
	
	      o Child 0-12 Months
	      o Child 13-24 Months
	      o Child 2-5 Years

TOPIC	DESCRIPTION & ITEMS OF NOTE
	o Child 6-12 Years
	o Child 13+ Years
	For the subsections based on child(ren) age – staff only complete subsections relevant to the family.
	Example: 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.
	Example: A participant is pregnant and has two children (ages 2 and 5 years old). The worker reviews the general 'Family,' 'Pregnancy,' and 'Child 2-5 Years' subsections to complete this 'Family' topic section. The conversation on both children is documented in the 'Child 2-5 Years' subsection.
Employment & Work Experience	Current employment circumstances and work history/experience.
Education & Training	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.
Financial Literacy	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.
	NOTE: WorkFirst staff ask the participant if they would like a referral to money management training available in their local community. 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.
Family Violence	Includes **mandatory** script and questions to support screening participants for family violence. See WFHB 6.5 for support in conducting these screenings with families.
Substance Use	Explores whether a referral to social services for a chemical dependency assessment and support is needed. See WFHB 3.2.1.8 and Chapter 6 for additional information.
Emotional Health	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.

TOPIC	DESCRIPTION & ITEMS OF NOTE
Medical/Health	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. **NOTE:** When a participant voluntarily provides information about HIV/AIDS/STD issues that could interfere with WorkFirst activities, use this section to document that information. The HIV/AIDS/STD note type is also available (see WFHB 1.6.4).
Housing	Opens up a discussion on the family's housing situation. Supports determining how their housing situation may impact the participant's engagement in activities
Transportation	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.
Legal Issues	Explores any legal issues the participant is facing that could affect activity engagement and/or employment opportunities.
Other Agencies	Allows staff to discuss and document agencies or programs the participant is already engaged with.

Navigation

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

- Checkboxes to indicate which activities the participant is referred to, based on the conversation.

- A free-form text box to capture additional notes or discussion items.

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

Topics:
- Family *
- Employment & Work Experience *
- Education & Training *
- Financial Literacy *
- Family Violence *
- Substance Use *
- Emotional Health *
- Medical/Health
- Housing
- Transportation
- Legal Issues
- Other Agencies
- Navigation *

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 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 from 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 prior to transitioning the participant to a WFSSS. WFSSS discuss and complete the PDT as part of completing their assessment.

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.*

- **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.

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

3.2.3.5 How do I use the PDT *Navigation* section when developing an IRP?

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. 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.

3.2.3.6 How do I use the PDT to complete annual updates?

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

NOTE: The PDT *copy over* feature 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 the PDT (before hitting *save).*   eJAS recognizes once the family violence and family planning screenings have been completed and no longer displays a notification on the Client Main Page.

3.2.3.7 How do I use the PDT for sanction reengagement, or for families who leave and return to TANF?

For participants who are in non-compliance sanction and wish to reengage in the program, or who 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 terminated from TANF due to non-compliance sanction (see WFHB 3.5.3).

For participants who had a PDT done within the last 12-months, the PDT *copy over* feature can be used so staff can build off the last conversation with the participant. Staff who use this function must 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 isn't one on file, WorkFirst staff must complete a new PDT with the participant.

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

3.2.3.8 What are the referral and mandatory reporting requirements for pregnant dependent minors?

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

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 staff 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 reports a pregnant minor dependent child. Under the mandatory reporting policy:

- Staff should only report child rape to law enforcement if the age of the father is known. Staff aren't required to ask the age of the father.

- If the participant volunteers information, and we become aware it meets the criteria of child rape, 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 Pathway Development Tool - Step-by Step Guide

Using the PDT to complete a comprehensive evaluation at financial intake, WorkFirst staff:

1. Complete appropriate *Tracking Information* at the beginning of the PDT.
2. Review the PDT *Personal Pathway Details* summary with the participant, if applicable, and use that information to guide which topic to begin with in the PDT *Topics* section.
3. Review 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.

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. Offer an immediate referral to social services for support, based on the discussion and interest of the participant.

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 social service assessment, WFSSS:

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

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 Assessment

Forms & Other Resources

- Customer-Driven Severity Scale – *only accessible to CSD staff*
- Personal Pathway (DSHS 11-154)
- WorkFirst Partner Directory – *only accessible to CSD staff*
- WorkFirst Website