

## Narration Guidelines

It is important to provide, clear and complete narration on cases. Good narration can make a difference when your coworker needs to respond in your absence, to support continuity of service when the case is transferred to a new office and can be a major factor in the outcome of quality assurance reviews and audits.

### Narrative Guidelines

This worker guide is not intended to be a template, but a guideline for elements to be addressed in eligibility narratives. They are listed below with specific categories that should be considered under each.

**ELIGIBILITY DECISION:** Decision for each program and person, approved, pending, denial, notices sent, length of certification, reporting system, referrals.

**NARRATIVE HEADING:** The type of narrative (SNAP recertification, TANF re-determination, etc.), clearly labeled to be easy to find in TRACS.

**SITUATION:** The circumstances that brought the applicant(s) in: include items such as date of request, filing date, interview date, program(s) applying for, alternate formats, expedited criteria.

**HH COMP (EXPLAIN FILING GROUP):** Who is in the household, who is in the filing group and why (i.e., who must apply together, who can apply separately, who cannot apply together.) Should also include authorized representative/alternate payee, anyone pregnant and due date.

**NONFINANCIAL ELIGIBILITY:** Nonfinancial eligibility for the program(s) applying for; pursuing assets; include items such as I.D., Social Security number (SSN), residency, citizenship, alien status, immigration documents, Date of Entry, student status, OFSET status, JOBS status, job quit/reduction, disqualifications, fleeing felon, disability, child care situation, tribal members, caretaker relatives that completed the *Employability Screening Tool* ([DHS 7823A](#)), and which caretaker relative received a JOBS overview.

#### NOTE

***At time of eligibility, after one has checked all appropriate screens, narrate your finding along with all IEVS screens checked. One can also click the box in the New Narrative window that says, "IEVS checked."***

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**NOTE**

***SNAP requires information on meeting basic needs only when the applicant is claiming shelter cost, but has no income.***

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**NOTE**

***Applicants for medical programs do not need to explain how they are meeting basic needs with no income.***

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**SNAP DEDUCTIONS:** Shelter, utilities, medical deductions, child care costs, court-ordered support.

**For all narratives:**

- Use clear, simple, concise language that is objective and unbiased;
- Be respectful (your narrative could be reviewed by the applicant, co-workers, management, quality control, central office or an administrative law judge);
- Record facts accurately and completely.

**Narratives should NOT include:**

- Sensitive information that is not needed for the program or services applied for;
- Personal opinions or assumptions;
- Judgmental statements, stereotypical comments or any offensive statement;
- Comments you could not defend to a manager or in a hearing;
- Speculations or criticisms;

- Details of applicants' lives that do not have an impact on the program they are applying for.

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## REMEMBER

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***Applicants have a right to see their records, including narratives.***

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### Resources:

- For narration of Domestic Violence information, go to the Generic Information, Domestic Violence section ([GP-b.17](#)) of the Family Services Manual;
- For use of secure or restricted narratives in A&D and Mental Health situations go to the Generic Information, Alcohol/Drug (A&D) and Mental Health Information section ([GP-b.16](#)) of the Family Services Manual;
- SNAP Workguide #3 – Effective Narration ([SNAP-WG#3](#));
- Case Management G – Narration and Computer Entry ([CM-g](#)).

### Transmittals related to narration:

See: [SS-IM-08-037](#) – Narrating Information from SSA Screens

See: [SS-IM-09-023](#) – Narrative Guide Training Q & A

See: [SS-PT-10-025](#) – FSM, Pre-TANF, B, Application, Verification, Eligibility and Participation

See: [SS-AR-15-008](#) –TRACS: Documenting the Income Eligibility and Verification System (IEVS)