DHS Oregon Department of Human Services

Children, Adults and Families

Information Memorandum Transmittal

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Authorized Signature

Number: SS-IM-08-031
Issue Date: 10/27/08

Topic: Cash Payments

Subject: Additional clarifications to Engagement and Re-engagement for TANF clients

Applies to (check all that apply):

- [ ] All DHS employees
- [ ] Area Agencies on Aging
- [x] Children, Adults and Families
- [ ] County DD Program Managers
- [ ] County Mental Health Directors
- [ ] Health Services
- [ ] Seniors and People with Disabilities
- [ ] Other (please specify):

Message: This Transmittal provides SSP field staff with clarification around the TANF Engagement and Re-engagement processes, along with new guidance on documenting these efforts.

Definitions:

- Engagement - What a Case Manager does at every contact, in partnership with the client, around life planning, goal setting, problem solving and exploring opportunities.

- Re-Engagement - The formal process that occurs when ongoing engagement efforts with the client have not been successful.

TRACS changes:

- A new narrative type titled "Engagement" was added to TRACS on 10/1/08. SSP staff and partners should use this to document engagement contact(s), as well as attempted engagement contact(s), regarding participation with the JOBS program.

- The Engagement narrative type should also be used when the Case Manager or the Re-Engagement Staffing Team gives good cause for noncooperation or determines not to move forward with a disqualification.

- The filter feature allows an at a glance view of all Engagement contacts and Re-Engagement efforts that have not resulted in a disqualification.

- The narrative should include the details of the team discussion and decision, adjustments to the case plan, the offering of screenings/assessments or treatment, the child safety review or any other actions or reviews that occurred prior to your decision.

- **Effective 10/1/08, only use the Re-Engagement Page in TRACS when the case is taken to the Re-Engagement staffing process, and the team decision is to impose a disqualification**. The team should ensure all required steps have been completed before making the decision to impose a disqualification. This should be recorded on the Re-Engagement Page in TRACS. Record the outcome of the staffing and complete the Re-Engagement Page before you "finalize" the page.

Helpful tips for client engagement:

- When a Case Manager becomes aware of a client's nonparticipation in JOBS activities, they should attempt at least two contacts to engage the client, one in writing and one in another format (example: one contact by phone call, home visit or e-mail) before moving to Re-Engagement. The focus during this period is on engaging the client in appropriate JOBS activities.

- When a JOBS contractor becomes aware that a client missed an activity and did not call in advance to discuss their absence, the contractor should attempt to initiate an engagement contact with the client within one business day. (Example: send the client a note about the missed activity and when the client is next scheduled to attend, request a home visit, send a post card, etc.).

- Case managers should look for a pattern of noncooperation. The worker's primary goal should be to engage the client in appropriate JOBS activities. Once the case manager is aware of a pattern of noncooperation, the case manager should attempt to contact the client as soon as possible, but no more than five (5) business days. If the worker makes at least two attempted contacts and they are unsuccessful, the worker should begin the Re-Engagement process.

- A new form is now available on the DHS Forms server, DHS 7825V (http://dhsresources.hr.state.or.us/WORD_DOCS/DE7825V.doc), for use as a voluntary checklist to help you prepare for the formal Re-Engagement team staffing.

If you have any questions about this information, contact:

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