

Jobs League Case File Review

Case Name: Participant name as it appears in MoJobs	Case DCN/User ID: Obtained from the report pulled in MoJobs or as listed by a provider	Staff Name/ID: Expand application, Case Manager field. If no assigned Case Manager, use case notes to determine who is working with participant
Reviewed By: Name of person conducting the review	Review Date/Type: <input type="checkbox"/> Monitoring <input type="checkbox"/> Targeted <input type="checkbox"/> Other Monitoring for annual or monthly compliance. Targeted if working reviews for a specific issue. Other for reviewing for any other internal purposes.	Review Period: FFYxx (xx/xx/xx-xx/xx/xx) This will be the full six-month period preceding the month notices are sent.

Enrollment: Staff Profiles - Programs – Generic Program>2019 Summer Jobs League>Expand for details

N/A Verification of SSN, age, citizenship, and selective service registration in file
 N/A Documentation of family size and participant role (parent or child living w/parent or caretaker)
 N/A Income eligibility entered in MoJobs or documentation of FSD verified TANF/SNAP case in file
 N/A Enrolled in MoJobs within one week if application completed by paper
 N/A SNAP participant co-enrolled in SkillUP (if not returning to school or will not enter fulltime employment)

Notes: DOCUMENTS TAB AND/OR PHYSICAL CASE FILE; CASE NOTES

What to look for: Ensure documentation dates and information in file matches information entered in MoJobs. Compare date of paper application to MoJobs application date was entered in MoJobs timely. Check for SNAP application if applicable

Participant Assessment: Staff Profiles – Plan>OAS (may be blank if assessment was done by paper)

N/A Orientation completed
 N/A Participant linked to other community organizations with job market and employer connections
 N/A Information provided and referral made to AEL (if no HS diploma or equivalent)
 N/A Work readiness/training information provided prior to placement (if not included in orientation)
 N/A Assessment completed prior to placement in any activity
 N/A Checklist used to ensure all steps completed

Notes: DOCUMENTS TAB OR PHYSICAL CASE FILE; CASE NOTES

What to look for: Check the file and review case notes to verify orientation was completed. Review paper assessment or OAS in MoJobs to determine if referrals were needed and if they were provided. Compare the date activities were entered on the application to the date of the assessment in file or date the OAS was completed.

Case Notes: Staff Profiles – Plan>Case Notes

N/A Mandatory Initial case note entered and contains required information
 N/A DWD Statewide Service Notes policy followed (see handbook for guidance)
 N/A Present for any supportive service
 N/A Present for any activity or service provided, including actions outside of MoJobs system
 N/A Entered at time of contact

Notes: HANDBOOK – OUTLINES CASE NOTE POLICY SPECIFICS; PHYSICAL CASE FILE

What to look for: Review all case note entries during the review period as one case note may apply to more than one system program. Ensure a case note exists for any item or action in the case file. Compare contact date to create date. Also, check for dates referenced in case note to ensure

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information matches date of entry. (example: Case note states enrolled 10/1 but contact date and create date shown as 10/3 would be an error)

Objective Assessment Summary: NOT CURRENTLY EVALUATED, MAY BE PRESENT IN SYSTEM AND CAN BE USED IN EVALUATING THE PARTICIPANT ASSESSMENT SECTION ABOVE UNTIL HANDBOOK IS REVISED TO INCLUDE THIS REQUIREMENT

- N/A Outlines desired employment, type of employment, and expected hourly wage
- N/A ONET and LMI reviewed if desired employment is not known
- N/A Training/education required for desired position is listed
- N/A All employment barriers sections are completed, with comments to address

Notes:

Individual Employment Plan (18-24 year olds): Staff Profiles – Plan>IEP (also referred to as Individual Service Strategy – ISS)

- N/A Includes steps to remove barriers
- N/A Connects services to desired outcome
- N/A Minimum one short-term & one long-term goal, not the same goal, with employment as final goal
- N/A Minimum of one objective per goal, not the same as the goal and has timeframe for completion
- N/A Updated with any changes

Notes: CASE NOTES; DOCUMENTS TAB AND PHYSICAL CASE FILE

What to look for: Review case notes and physical file to ensure desires of participant are entered in the IEP/ISS. Look for worksite agreement/packet in case file to compare to plan outlined in IEP/ISS.

Supportive Services:

- N/A TRE/WRE provided to remove or reduce barriers to allow participation in Jobs League activity

If yes:

- N/A Other resources explored and documented
- N/A Justification noted and need demonstrated to allow participation in Jobs League activity

Notes: CASE NOTES; OAS; DOCUMENTS TAB AND/OR PHYSICAL CASE FILE

What to look for: Notations of any needed services, payment for services, verification of attendance, and/or referrals to other agencies for supportive services

Contact:

- N/A Biweekly contact with participant and if applicable, with employer
- N/A Minimum of one monthly face-to-face with participant and if applicable, with employer

Notes: CASE NOTES; DOCUMENTS TAB AND PHYSICAL CASE FILE

What to look for: Notations of contact, copies of onsite meeting notes and/or signed reviews in physical case file

Outcomes:

- N/A Contact attempted or completed for exited participant for four quarters

If yes, MoJobs reflects:

- N/A Employment gained
- N/A Credentials/certificates obtained
- N/A Short-term training completed
- N/A Enrolled in or completed post-secondary education

Notes: CASE NOTES; DOCUMENTS TAB AND PHYSICAL CASE FILE

What to look for: Notations of contact for four quarters post-exit and any notated gains. Must be in the case file or in MoJobs case notes – external spreadsheet is insufficient for this component.

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Reviewer Comments/Recommendations:

Currently, there are no requirements in the handbook for:

Entry of OAS

Entry of Activity Codes

IEP for anyone under 18 years old

Any directive for where to enter the four quarters follow-up for participants

These issues are being reviewed but cannot be evaluated as part of your current review process.