CASE MANAGEMENT CHECKLIST

All resources can be found on the SNAP E&T Provider website

ELIGIBILITY VERIFICATION		
TASK	**SYSTEM**	**RESOURCES**
Verify individual is receiving SNAP: Verify individual is currently receiving federal food assistance (SNAP) in MAXIS.	MAXIS	SNAP E&T Provider Handbook Eligibility & Enrollment Form
Verify participant was screened and referred by eligibility: A participant cannot be enrolled in SNAP E&T without a referral from eligibility. On the STAT/WREG panel, this date can be found on the SNAP E&T Referral Date.	MAXIS (STAT/WREG)	SNAP E&T Provider Handbook Eligibility & Enrollment Form
Verify if participant is time-limited: Time-limited recipients (TLR) are eligible for SNAP only three months in a 36-month period unless the individual earns additional months by meeting the work requirement.	MAXIS (STAT/WREG)	SNAP E&T Provider Handbook SNAP E&T Manual

ENROLLMENT & CASE MANAGEMENT		
TASK	**SYSTEM**	**RESOURCES**
Enroll participant in SNAP E&T program sequence in Workforce One (WF1): Use the Eligibility & Enrollment form to collect all required information for enrollment. Document and case note program intentionality.	WF1	SNAP E&T WF1 User Manual Eligibility & Enrollment Form
Complete Employability Assessment: The assessment must be completed prior to opening an activity and is used to develop the employment plan. The employability assessment collects and evaluates information to identify a participant's employment goals, strengths, barriers, and support service needs.	WF1	SNAP E&T Provider Handbook
Complete Employment Plan: The employment plan (EP) must be completed for each SNAP E&T participant. An employment plan may be in paper form or created electronically in WF1 but must be documented in WF1. For TLR's the plan must outline how a participant can meet the work requirements to earn additional months of benefits, if applicable.	WF1/*EDS (paper plan)	SNAP E&T Provider Handbook eDoc DHS-6020-ENG
Open activities: An activity must only be opened when a participant is actively engaged. The activity must be closed when the participant is no longer actively engaged.	WF1	SNAP E&T WF1 User Manual SNAP E&T Activities Guide
Case note: Monthly case notes are required to show the participant's journey and engagement in the program. Include case management discussions related to goals, strengths, barriers, and any communication to eligibility worker. Ensure case notes are clear, concise, and objective.	WF1	SNAP E&T Provider Handbook
Document support services: Support services must be reasonable, necessary, and directly related to an open activity. Track internally for invoicing and retain physical documentation for monitoring.	WF1 *EDS	Guidance on Cost & Reimbursements
Document Measurable Skill Gain: Enter MSG in WF1 when an MSG is obtained, at time of closing a related activity and/or at the end of an academic term. (see page 2)	WF1	SNAP E&T Provider Handbook
Document Credentials: Enter credential at the time of closing a related activity or exiting record.	WF1	SNAP E&T Provider Handbook
Verify eligibility: Verify participant is receiving SNAP each month they are enrolled. *Case note verification	MAXIS WF1	SNAP E&T Provider Handbook
Exit participant from SNAP E&T sequence: SNAP E&T sequence must be closed in WF1 within 30 days of SNAP closure or after 60 days of non-engagement. A participant may also choose to exit the program at any time.	WF1	SNAP E&T WF1 User Manual SNAP E&T Provider Handbook

Not a policy requirement; best practice

MSG criteria & information on back

MINNESOTA
SNAP EMPLOYMENT AND TRAINING

MSG	SNAP E&T ACTIVITY	CRITERIA	DOCUMENTATION	ATTAINMENT DATE
Educational Functional Level	Basic Education and/or Foundational Skills Instruction	Counts as an MSG if the participant is receiving instruction below the post-secondary educational level and achieves at least one educational functioning level.	Physical documentation is optional. A participant's verbal statement is acceptable and must be documented in case notes.	Date of the post-test results showing at least one full Educational Functioning Level gain.
Secondary or Post-Secondary Transcript	Career and/or Technical Education Programs or other Vocational Training	**Secondary:** Counts as an MSG if student has achieved a "D-" or above for all classes and is in good academic standing. **Post Secondary:** Counts as an MSG if student made satisfactory academic progress.	**Secondary:** Copy of secondary transcript or grade report for one academic term. Physical documentation is optional. A participant's verbal statement is acceptable and must be documented in case notes. **Post Secondary:** Physical documentation is optional. A participant's verbal statement is acceptable and must be documented in case notes.	Actual date grades were attained (end of term).
Skills Progression	English Language Acquisition Integrated Education and Training (IET)/Bridge Programs Pre-Apprenticeship Apprenticeship On-the-Job Training Internship Transitional Jobs Work Readiness Training	Counts as an MSG if an evaluation has indicated progression toward goal(s).	A copy of the exam results, transcript, or documentation directly from the employer or training provider showing successful completion. A participant's verbal statement is acceptable and must be documented in case notes.	Date of the exam results or transcript.
Training Milestone	On-the-Job Training Apprenticeship	Counts as an MSG if skills gained are job-specific and result from participation in training services that will lead to obtaining or maintaining employment consistent with employment goal.	A verbal or written statement from participant or employer is acceptable and must be documented in case notes.	Date the individual achieved job-specific skills.