Center for Employment Opportunities

SNAP E&T for Employment Social Enterprises

Client/Participant Orientation Checklist Template

Using this Template

This document guides you through the process of creating a checklist that caseworkers and clients/participants can use to track progress through enrollment in your ESE's SNAP E&T program.

To help staff and clients understand the sequence of the checklist, we encourage you to add section titles that mirror the enrollment steps described in the orientation slide deck. The headings in this template mirror the example steps given on slide 11 of the Template for Client/Participant Orientation.

Modify your language and section headers to reflect your process.

Example questions or fields are captured in gray boxes

Notes and additional guidance captured in green boxes

Section 1: Eligibility

List the requirements for SNAP E&T and/or your program as individual checkboxes. Incorporate messages throughout guiding staff through the document.

FOR EXAMPLE:

The client:

- ☐ *Does not receive TANF*
- ☐ *Is able to work*

If the client answers "no" to either question, they do not qualify for SNAP E&T. If yes, proceed.

- ☐ *Receives SNAP benefits*
    - *If unchecked, proceed to Section 1A: Applying for SNAP*
    - *If checked, proceed to Section 1B: Verification*

Section 1A: Applying for SNAP

If your ESE pre-screens clients for SNAP eligibility and/or assists them with application, create a checkbox that corresponds to each step in this process. Consider including a checklist of documents required for the SNAP application. [Question for SJI: Should we make a note here about assistance with SNAP applications not being a reimbursable expense?]

FOR EXAMPLE:

Client has the presented following documentation:

- ☐ *ID*
- ☐ *Social Security Card*

  Recent Pay Stubs:
  - ☐ *Stub 1*
  - ☐ *Stub 2*

Consider including a list of documents that clients will need to "attach" to the application or presented in the interview. Consult your county/state agency for a list of required documents.

Client successfully completed:

- ☐ *Application*
- ☐ *[SNAP application support that your organization provides, such as mock interview, pre-screening]*

Client has:

- ☐ *Scheduled interview*
- ☐ *Obtained SNAP benefits*

Once client has completed these steps, proceed to Section 1B: Verification

Section 1B: E&T Verification

Create a section which indicates that a client's SNAP participation is verified by the state for the purpose of SNAP E&T participation, sometimes referred to as "reverse referral" into E&T. Recall that an individual must be enrolled in SNAP the month in which they participate in a SNAP E&T component, except for Retention. It may be helpful to include language to guide staff and/or checkboxes for steps that need to be completed prior to verification.

FOR EXAMPLE:

Request client to complete release of information to share personal identifying information (if you don't already have this documented elsewhere) .

- ☐ *Client completed release of information*
- ☐ *Added client to E&T roster for verification*
- ☐ *Verified by Agency*

Note: Many state agencies may require clients to sign a release of information before verifying participation in SNAP E&T.

Section 2: Assessment

SNAP E&T participation requires an employability assessment. If your organization conducts assessments, create a section where staff and clients/participants can track progress through the assessment.

Create subheadings for assessment activities using the terms described in your Client/Participant Orientation Slide deck. Under these headings, you may want to create checkboxes affirming that clients have successfully demonstrated the skills and knowledge assessed.

The list of skills and knowledge assessed may be found in the SNAP Employment and Training Toolkit p. 40-41. Consult your county/state agency about approved/required assessments.

FOR EXAMPLE:

Interview

- ☐ *Interview was conducted with client, the following are consistent with criteria for participation:*
  - ☐ *Employment History*
  - ☐ *Employment-Related Skills, Abilities, and Interests*
  - ☐ *Employment Barriers*

Note: Criteria for participation vary by state. Please consult your state/county agency when determining criteria for guidance.

Section 3: Civil Rights Notice and E&T Enrollment Documents

While you may choose to include all documents in section 2, you may want to create a section for documents which are only collected from E&T enrolled/verified clients that are required by your SNAP E&T agency. In some cases, this may only be a civil rights notice as required by E&T.

FOR EXAMPLE:

Client has submitted:

- ☐ *Civil Rights Notice*
- ☐ *Acknowledge of Client Responsibilities*

Sign Off

Since *Section 3: Enrollment Documents* may be the final section of the checklist, consider creating a signature section or checkbox where the casework can “sign off,” approving the client to enroll.

FOR EXAMPLE:

Client has completed all enrollment requirements.

Signature:______________________________Date:______________

You may also want to consider including a signature field at the end of each section. “Signing Off” as they complete the enrollment process can help clients/participants feel that they are progressing and can promote a sense of self-efficacy. These signatures may be used as accountability tools for both staff and clients.