

3.2.3 Pathway Development Tool

Revised on: ~~November 15, 2021~~ February 1, 2024

Effective November 15, 2021, the use of the Personal Pathway tool is suspended until further notice.

Legal References:

- [RCW 74.08A.260](#)
- [RCW 74.08A.275](#)
- [RCW 74.08A.285](#)
- [RCW 74.12.410](#)
- [WAC 388-61-001](#)
- [WAC 388-310-0400](#)
- [WAC 388-310-0700](#)
- [WAC 388-310-0200](#)

This WorkFirst Handbook (WFHB) section describes how to use the Pathway Development Tool. It covers:

- [3.2.3.1](#) What is the Pathway Development Tool (PDT)?
- [3.2.3.2](#) What is the PDT structure and what topics does it cover?
- [3.2.3.3](#) How do I use the PDT to complete a comprehensive evaluation?
- [3.2.3.4](#) How do I use the PDT to complete a social service assessment?
- [3.2.3.5](#) How do I use the PDT *Navigation* section when developing an IRP?
- [3.2.3.6](#) How do I use the PDT to complete annual updates?
- [3.2.3.7](#) How do I use the PDT for sanction reengagement, or for families who leave and return to TANF?
- [3.2.3.8](#) What are the referral and mandatory reporting requirements for pregnant dependent minors?
- [3.2.3.9](#) Pathway Development Tool - Step-by Step Guide

3.2.3.1 What is the Pathway Development Tool (PDT)?

The Pathway Development Tool (PDT) is an eJAS tool used to conduct WorkFirst comprehensive evaluations and social service assessments. The PDT provides a snapshot in time of what's going on with a participant, their family, and their individual circumstances. It's used to gather information on what activities will be most helpful to the participant and aids in developing their Individual Responsibility Plan (IRP).

3.2.3.2 What is the PDT structure and what topics does it cover?

The PDT is divided into various sections and topics to support a conversation between staff and participants to determine the best engagement pathway. It's designed to allow WorkFirst staff the flexibility to select a starting topic when engaging the participant in discussion, and for the conversation to flow based on family needs and goals. The PDT includes the following sections:

Tracking Information

The first section allows staff to track specific information, including:

- Program
- Status of the tool (complete or pending)
- Pending reason (when applicable)
- Equal Access (EA) discussed/addressed
- Details of the EA Plan (when applicable)
- Social Service Assessment Type – *this field is only for use by WFSSS when conducting an assessment using the PDT (see [WFHB 3.2.3.4](#))*

Note: WorkFirst sStaff can't proceed with saving a PDT until the EA Plan fields are completed. If the participant doesn't need an EA Plan, staff must check the *Equal Access has been addressed* box, and note "N/A" in the *Describe Equal Access Plan* field.

The screenshot shows a web form for tracking information. It includes a dropdown for 'Client Pathway Program' set to 'WorkFirst'. There are two radio buttons for tool status: 'Tool Verified as Complete' (unselected) and 'Pending' (selected). A checkbox for 'Equal Access has been addressed' is checked. A 'Describe Equal Access Plan' text area contains 'N/A' and a timestamp. A 'Pending Reason' dropdown is set to 'In Process'. On the right, there is a section for 'Social Services Assessment Types - Choose all that apply:' with a grid of 14 checkboxes, all of which are currently unchecked. A 'Save' button is located at the bottom right of the form.

Personal Pathway Details

This section summarizes participant responses captured in the Personal Pathway, for participants who choose to complete one. This information, when available, is used by WorkFirst staff to determine which topic to begin with in the PDT. For more information on how to use this information while completing a PDT, please see [WFHB 3.2.2.3](#) and [3.2.2.4](#).

Personal Pathway Details			
Values	Goals	Strengths	Obstacles
Be more financially stable	Find a job that provides for my family	Creating or building things	Be able to afford safe and stable housing
To give back and contribute	To gain work experience	Communication	To have safe and stable housing
Taking care of my health	Connecting with family violence resources	Solving problems	Working with too many agencies right now
	Exploring resources to help with...	Organizing and planning	
	Exploring volunteering at my child's school or daycare		

Topics

This section includes topic categories for [WorkFirst](#) staff to discuss with the participant. Each topic subsection includes the following:

- **Example script** with suggested questions to guide [WorkFirst](#) staff in having a conversation with the participant on a topic. The script is a starting point for the conversation. [WorkFirst s](#)Staff may ask all or some of the questions, or use other appropriate questions of their own to engage with the participant. The questions are open-ended, where the participant has the opportunity to do most of the talking. They focus on strength and supports.
- **Freeform text fields** that [WorkFirst WorkFirst](#) staff use to document the discussion with the participant on a topic. This format supports open-ended conversation, with the participant guiding the conversation.
- For most topics, there are suggestions listed for the type of information to **document** in the free from text field.
- A list of **indicators, strengths, needs/interests, and referrals** (below the free form text box). [WorkFirst s](#)Staff select all options that apply to the participant, based on the conversation. [WorkFirst s](#)Staff discuss the items selected and engage in a conversation around service, supports, referrals, and goals.

See the example below (from the PDT Transportation topic section):

Topics:	Transportation																								
<ul style="list-style-type: none"> • Family * • Employment & Work Experience * • Education & Training * • Financial Literacy * • Family Violence * • Substance Use * • Emotional Health * • Medical/Health Housing • Transportation • Legal Issues • Other Agencies • Navigation * 	<p>Example Script:</p> <ul style="list-style-type: none"> • How do you and your family get around? • What supports do you need for your transportation? • What supports do you need to get where you need to go? <p>Document this type of information if it applies:</p> <ul style="list-style-type: none"> • Type(s) • Back up/alternatives • License/insurance/registration/tabs/fines • Problems/repairs needed • Safety belts/seats <div style="border: 1px solid gray; height: 80px; width: 100%;"></div> <p>(1929 of 2000 characters left)</p> <p>Select all that apply:</p> <table border="0"> <thead> <tr> <th>Indicator (I)</th> <th>Strength (S)</th> <th>Need/Interest (N)</th> <th>Referral (R)</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Has vehicle and valid driver's license (S)</td> <td><input type="checkbox"/> No transportation available (I)</td> <td><input type="checkbox"/> Needs support services to stabilize (N)</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Uses public transportation (I)</td> <td><input type="checkbox"/> Uses ride share applications (I)</td> <td><input type="checkbox"/> Needs to obtain insurance (N)</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Gets rides from family and friends (I)</td> <td><input type="checkbox"/> Shares a vehicle (I)</td> <td><input type="checkbox"/> Needs to obtain driver's license (N)</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Walks/rides bike (I)</td> <td><input type="checkbox"/> Unreliable/unsafe vehicle (I)</td> <td><input type="checkbox"/> Needs to obtain registration/license tabs (N)</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Suspended license (I)</td> <td><input type="checkbox"/> Needs help with cost of tolls/ferries/fees (N)</td> <td><input type="checkbox"/> Referral to Social Services for transportation support (R)</td> <td></td> </tr> </tbody> </table>	Indicator (I)	Strength (S)	Need/Interest (N)	Referral (R)	<input type="checkbox"/> Has vehicle and valid driver's license (S)	<input type="checkbox"/> No transportation available (I)	<input type="checkbox"/> Needs support services to stabilize (N)		<input type="checkbox"/> Uses public transportation (I)	<input type="checkbox"/> Uses ride share applications (I)	<input type="checkbox"/> Needs to obtain insurance (N)		<input type="checkbox"/> Gets rides from family and friends (I)	<input type="checkbox"/> Shares a vehicle (I)	<input type="checkbox"/> Needs to obtain driver's license (N)		<input type="checkbox"/> Walks/rides bike (I)	<input type="checkbox"/> Unreliable/unsafe vehicle (I)	<input type="checkbox"/> Needs to obtain registration/license tabs (N)		<input type="checkbox"/> Suspended license (I)	<input type="checkbox"/> Needs help with cost of tolls/ferries/fees (N)	<input type="checkbox"/> Referral to Social Services for transportation support (R)	
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Below are all topics included within the PDT:

TOPIC	DESCRIPTION & ITEMS OF NOTE
<p style="text-align: center;">Family</p>	<p>Explores the family’s current situation and what services or supports are needed, and/or what exemptions or deferrals may be appropriate.</p> <p>Includes the following subsections:</p> <ul style="list-style-type: none"> • Family – Includes a link for creating the mandatory <i>Family Planning Screening</i> (see WFHB 1.3). • Pregnancy – Includes a field for pregnancy <i>due date</i>, pre-filled when applicable (from ACES). • Separate subsections based on age of <u>the</u> child(ren) in the home: <ul style="list-style-type: none"> ○ Child 0-12 Months ○ Child 13-24 Months ○ Child 2-5 Years ○ Child 6-12 Years ○ Child 13+ Years <p>For the subsections based on child(ren) age – WorkFirst staff only complete subsections relevant to the family.</p> <p>Example: A participant has two children (ages 6 months and 5 years old). WorkFirst staff The worker reviews the general 'Family,' 'Child 0-12 months,' and 'Child 2-5 Years' subsections to complete the 'Family' topic section.</p> <p>Example: A participant is pregnant and has two children (ages 2 and 5 years old). WorkFirst staff The worker reviews the general 'Family,' 'Pregnancy,' and 'Child 2-5 Years' subsections to complete this 'Family' topic section. The conversation on both children is documented in the 'Child 2-5 Years' subsection.</p>
<p style="text-align: center;">Employment & Work Experience</p>	<p>Current employment circumstances and work history/experience.</p>
<p style="text-align: center;">Education & Training</p>	<p>Education and training experience, along with related goals and interest in pursuing this as an engagement activity. It includes a field to capture the participant’s highest grade level completed.</p>
<p style="text-align: center;">Financial Literacy</p>	<p>Financial literacy services and supports can provide families with the tools for a smoother transition from a benefit-based income to a wage-based income, and keep them from unknowingly entering into financially devastating credit arrangements. It is an essential element to a family achieving financial stability, self-sufficiency, and economic mobility.</p>

TOPIC	DESCRIPTION & ITEMS OF NOTE
	<p>NOTE: WorkFirst sWorkFirst staff ask the participant if they would like a referral to money management training available in their local community. This is considered a life skill and is not a mandatory activity. WorkFirst sStaff can find a list of resources that provide financial literacy programs at the Washington Department of Financial Institutions - Statewide Financial Education Class Calendar and the Washington Asset Building Coalition website.</p>
Family Violence	Includes mandatory script and questions to support screening participants for family violence. See WFHB 6.5 for support in conducting these screenings with families.
Substance Use	Explores whether a referral to social services for a chemical dependency assessment and support is needed. See WFHB 3.2.1.8 and Chapter 6 for additional information.
Emotional Health	Explores whether a referral to social services to assess and support the participant's emotional health and mental well-being is needed. See WFHB 3.2.1.8 and Chapter 6 for additional information.
Medical/Health	<p>Explores whether a referral to social services to assess and support the family's health circumstances, or if deferral/exemption is appropriate. See WFHB 3.2.1.8 and Chapter 6 for additional information.</p> <p>NOTE: When a participant voluntarily provides information about HIV/AIDS/STD issues that could interfere with WorkFirst activities, WorkFirst staff use this section to document that information. The HIV/AIDS/STD note type is also available (see WFHB 1.6.4).</p>
Housing	Opens up a discussion on the family's housing situation. Supports determining how their housing situation may impact the participant's engagement in activities
Transportation	Examines what the participant's current means of getting around is. Opens up a conversation on what type of transportation support services are needed for activity engagement.
Legal Issues	Explores any legal issues the participant is facing that could affect activity engagement and/or employment opportunities.
Other Agencies	Allows staff to discuss and document agencies or programs the participant is already engaged with.

Navigation

This section, nested in the *Topics* list, supports ~~WorkFirst WorkFirst~~ staff in having a discussion with the participant on engagement pathway options. It includes:

- Checkboxes to indicate which activities the participant is referred to, based on the conversation.
- A free-form text box to capture additional notes or discussion items.
- A summary of all *indicators, strengths, needs/interests, and referrals* selected from each topic section. This information is displayed to support engagement pathway discussion, and to remind staff of what referrals need to be offered/made.

Topics:

- [Family *](#)
- [Employment & Work Experience *](#)
- [Education & Training *](#)
- [Financial Literacy *](#)
- [Family Violence *](#)
- [Substance Use *](#)
- [Emotional Health *](#)
- [Medical/Health](#)
- [Housing](#)
- [Transportation](#)
- [Legal Issues](#)
- [Other Agencies](#)
- [Navigation *](#)

Navigation

WorkFirst Activities referred to:

<input type="checkbox"/> ESD Job Search	<input type="checkbox"/> Unsubsidized Employment	<input type="checkbox"/> Issue Resolution	<input type="checkbox"/> 3rd Trimester Deferral
<input type="checkbox"/> Commerce Work Programs	<input type="checkbox"/> Life Skills	<input type="checkbox"/> Exempt for Barriers	<input type="checkbox"/> Choosing Infant/Toddler Exemption
<input type="checkbox"/> SBCTC Education & Training	<input type="checkbox"/> Parental Education	<input type="checkbox"/> Two-Parent Not Required to Participate	<input type="checkbox"/> Referral to Social Services
<input type="checkbox"/> LEP Pathway	<input type="checkbox"/> Volunteering		

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Indicator	Strength	Need/Interest	Referral
Felony convictions	Child(ren) are doing well (0-12 months)	Interested in home visiting or parent education (child 0-12 months)	Referral to Women, Infants, and Children (WIC) (child 0-12 months)
No family violence concerns disclosed at this time	Currently employed	Opting for Infant Exemption (child 0-12 months)	
No medical/health concerns disclosed at this time	Completed some college	Interested in pursuing education	
No emotional health concerns disclosed at this time	Maintaining sobriety		

3.2.3.3 How do I use the PDT to complete a comprehensive evaluation?

The goal is for WorkFirst staff to do thorough comprehensive evaluations at the initial intake for participants approved or likely to be approved for TANF (see [WFHB 3.2.1.8](#)). This allows **WorkFirst staff to engage** participants **to engage** in services that make sense based on their family's circumstances, strengths, desires, and goals.

WorkFirst staff use any information gathered from the **Personal Pathway tool** to guide which topics to start with during the comprehensive evaluation. Information collected during the financial intake is also used as launching points during the PDT discussion - supporting a fluid and meaningful conversation with the participant, and avoid **them** needing to re-tell their story.

Example: During financial intake, an applicant mentions they didn't graduate from high school. **WorkFirst staff** **The WFPS** begins the conversation on the PDT 'Education & Training' topic by referring back to their discussion during the financial intake. They ask the participant to provide information around their experience in school.

There are many topics that are legally required to be covered during the comprehensive evaluation. Required topics are **bolded** in the *Topics* table in [WFHB 3.2.3.2](#). They're marked with an asterisk [*] within eJAS. It should be the goal of staff to touch upon all topics included in the PDT, leveraging a participant's **Personal Pathway Details** to drive the conversation.

After each *Topic* section is reviewed, information documented, and *indicators, strengths, needs/interests and referrals* selections made, WorkFirst staff must save the section before moving to the next topic. Once all topics are reviewed with the participant, WorkFirst staff must complete the *Navigation* section by:

- Reviewing the participant's *indicators, strengths, needs/interests, and referrals*.
- Discussing engagement pathway options and indicating which WorkFirst activity the participant would like to engage in.
- Documenting the discussion in the free form text field.

Once the *Navigation* section is complete, WorkFirst staff finalize a PDT (by marking *Tool Verified as Complete* and selecting *save*). See [WFHB 3.2.3.8](#) for additional support in using the *PDT Navigation* section.

NOTE: A PDT cannot be finalized until all legally required, mandatory topics are reviewed. A mandatory topic is not considered complete until free form text and at least one of the *indicators, strengths, needs/interests, and referrals* is checked.

Social Service Referral Option:

For participants who require a Pregnancy to Employment assessment or have an urgent/emergent issue, an immediate referral to social services is available. The WFPS may start the PDT and complete as much as possible prior to transitioning the participant to a WFSSS.

In these situations, the WFPS will use information obtained during the financial eligibility portion of the interview as a jumping off point to further discuss the family's circumstances. At the point that the WFPS determines an assessment is needed, the WFPS documents all information shared up to that point, saves and pends the PDT before transitioning the participant to a WFSSS. The WFSSS will review, discuss, and complete the PDT as part of completing their assessment, and then develop the IRP.

If during the conversation with the participant, it's clear an urgent or emergent issue exists, WorkFirst staff use the **Customer-Driven Severity Scale** is used to determine if an immediate offer of referral to social service staff is needed. This tool supports discussion and determining, in partnership with the participant, by allowing the participant to make the decision on whether their issue is urgent or emergent. In these circumstances, No medical verification is not required to make an initial referral for an assessment with the Case Manager.

If during the comprehensive evaluation, the participant indicates possible

Though, if the issues (e.g. chemical dependency or mental health) is determined to potentially that may affect impact the participant's ability to fully engage in employment and training activities, the referral to social services may still be necessary (Issue Resolution pathway may be most appropriate. At that juncture, WorkFirst staff would request medical verification from the participant, if appropriate based on the issue, and refer them to the Case Manager for assessment and next steps.

For participants who require an assessment (including a Pregnancy to Employment assessment) or have an urgent/emergent issue, an immediate referral to social services follows the financial intake. Refer to WFHB 3.2.1.11 for additional guidance. For these referrals, medical verification is requested and obtained from the participant prior to the WFSSS engaging with the participant and/or determining who should carry the case.

If referred for further assessment, the Case Manager reviews, discusses, and completes this step with the participant. This may include completing required topics needed to satisfy the comprehensive evaluation requirements, if those were not completed in the financial intake.

While it isn't mandatory to refer for a chemical dependency or mental health assessment if the participant is in treatment, staff should consider and offer an assessment-social service referral. This allows the participant to explore the situation with their case manager-a WFSSS and receive additional information to develop a more effective IRP.

Example: Talena shares during her comprehensive evaluation that she is struggling with depression. The worker refers to the **Customer Driven Severity Scale** and Talena indicates it is greatly impacting her ability to do normal day to day things and could impact her ability to participate in activities. It is very obvious that Talena is struggling with the conversation and discussing her barrier. The worker checks in with Talena and they determine to stop where they are in the process for now. The worker documents the conversation around Talena's depression in the Mental Health topic section of PDT and pends the PDT under the reason *Referral to Social Services*. The worker lets Talena know her Case Manager will be reaching out to continue the process.

3.2.3.4 How do I use the PDT to complete a social service assessment?

The PDT also supports Case Managers-WFSSS in completing social service assessments. Three key PDT features support seamless assessments:

- **Social Service Assessment Type** – Allows Case Managers-WFSSS to indicate which type of assessment they are doing. It is only for use by Case Managers-WFSSS.
- **Ability to pend the PDT for WFSSS use** – Allows WorkFirst staff-WFPS to 'pend' the PDT if the participant is unable to stay to complete their comprehensive evaluation-assessment is needed. This allows around an initiated the PDT-a WorkFirst staff-WFPS starts to be continued, built upon, and finalized by at the Case Manager, if necessary based on participant needs and availability-WFSSS. If completing the PDT by phone, the WFSSS should explain to the participant that they are reviewing the case so the participant doesn't have to repeat themselves.
- **Ability to copy over a finalized PDT** – If a participant's PDT is already completed for purposes of the comprehensive evaluation when at the Case Manager receives the case finalized, the Case Managers-WFSSS can use the 'copy over' feature to do any needed their assessments and update the PDT as needed.

NOTE: When a participant is referred to [their Case Managera-WFSSS](#) with a pended PDT, the [Case ManagerWFSSS](#) is required to complete any remaining elements of that PDT with the participant while [either](#) conducting the assessment [when needed, or to just satisfy requirements of the comprehensive evaluation](#) ~~finalize the tool by reviewing the *Navigation* section with the participant and complete the IRP. If completing the IRP by phone, utilize the WorkFirst Partner Directory.~~

For additional information and support in conducting social service assessments, see [WFHB 5.1](#) & [Chapter 6](#).

3.2.3.5 How do I use the PDT *Navigation* section when developing an IRP?

The PDT *Navigation* section supports [WorkFirst](#) staff in discussing with the participant engagement pathway options and developing the IRP. WorkFirst staff review the summary of *indicators, strengths, needs/interests, and referrals* and work with the participant to determine what activities to engage in [or if referral for assessment is needed](#). Refer to [WFHB 3.2.1.10](#) for guidance on engagement pathways, and [WFHB 3.3.1](#) for guidance on IRP development.

Once an engagement pathway has been agreed to, WorkFirst staff indicate what activities the participant is engaging in by checking boxes under the *WorkFirst Activities referred to* area of the *Navigation* section, and documenting the discussion in the free form text field.

3.2.3.6 How do I use the PDT to complete annual updates?

[WorkFirst Staff Case Managers](#) must do an annual update of a participant's comprehensive evaluation and [any needed](#) social service assessments. eJAS notifies [the Case Managerstaff](#) when mandatory screenings are required (annual family violence and family planning screenings). If it has been over a year since a PDT was completed at the time of these annual screenings, [Case Managersstaff](#) complete a new PDT with the participant. The family planning and family violence screenings are accessible through the **Family** and **Family Violence** topic sections of the PDT.

NOTE: The PDT *copy over* feature is only available for up to 12 months. ~~When using the *copy over* feature, [WorkFirst's Staff need to](#)~~ select this option when they first enter the PDT (before hitting *save*). ~~eJAS recognizes once the family violence and family planning screenings have been completed and no longer displays a notification on the Client Main Page.~~

3.2.3.7 How do I use the PDT for sanction reengagement, or for families who leave and return to TANF?

For participants who are in non-compliance sanction and wish to reengage in the program, or who [exited left](#) TANF and then return to the program, [WorkFirst](#) staff are required to complete a new comprehensive evaluation with the participant, using the PDT. This includes households that were terminated from TANF due to non-compliance sanction (see [WFHB 3.5.3](#)).

For participants who had a PDT done within the last 12-months, the PDT *copy over* feature ~~can be used so~~ allows WorkFirst staff ~~to~~ build off the last conversation with the participant. WorkFirst staff who use this function must review/update all topic sections with the participant and complete the *Navigation* section based on the conversation. If a PDT on file is older than 12-months, or there isn't one on file, WorkFirst staff ~~must~~ complete a new PDT with the participant.

NOTE: The PDT *copy over* feature is only available for up to 12 months.

3.2.3.8 What are the referral and mandatory reporting requirements for pregnant dependent minors?

WorkFirst staff offer a referral to [First Steps](#) for pregnant dependent minors (see [WFHB 5.1.17](#)).

NOTE: [First Steps](#) helps low-income pregnant individuals get the health and social services they may need and covers a variety of services for pregnant individuals and their infants.

WorkFirst ~~s~~CSD staff must follow the policy for mandatory reporting of suspected child abuse, neglect or child rape in the EA-Z Manual, [Child Abuse and Neglect Reporting](#) when a participant reports a pregnant minor dependent child. Under the mandatory reporting policy:

- ~~C~~Staff should only report child rape is only reported to law enforcement if the age of the father is known. WorkFirst ~~s~~Staff aren't required to ask the age of the father.
- If the participant volunteers information, and ~~we become~~ WorkFirst staff become aware it meets the criteria of child rape, a law enforcement referral is required.
- Once the child is born, more information about the age and identity of the father may become available as part of the child support enforcement process.

3.2.3.9 Pathway Development Tool - Step-by Step Guide

When uUsing the PDT to complete a comprehensive evaluation at financial intake, WorkFirst WorkFirst staff:

1. Complete appropriate *Tracking Information* at the beginning of the PDT.
2. Review the PDT *Personal Pathway Details* summary with the participant, if applicable, and use that information to guide which topic to begin with in the PDT *Topics* section.
3. Review PDT *Topics* with the participant.
4. Complete the PDT *Navigation* section, determining engagement pathway and appropriate next stepsRP activities with the participant. Leverage *Personal Pathway Details* summary, if applicable, to support this discussion.
5. Document comprehensive evaluation discussion in eJAS.

If the participant is unable The WFPS may not be able to complete the comprehensive evaluation at the financial intake ~~appointment if:~~

- A Pregnancy to Employment assessment is needed. In these circumstances, offer an immediate referral to social services.
- The participant is experiencing an urgent or emergent issue. In these circumstances, discuss the severity of the situation with the participant. Offer an immediate referral to social services for support, based on the discussion and interest of the participant.

If the participant can't complete the comprehensive evaluation immediately following financial intake:

- Schedule an appointment using the AP component with an end date to match the scheduled appointment, providing adequate advance notice for the participant to complete this process

Send either the ACES General Appointment Letter (50-05) or eJAS Appointment Letter using “WF PDT Appt” canned text in Barcode

1. Save/pend the PDT (Customer is unable to complete pend reason), if started, for a the Case Manager to finish.
2. Inform the participant that their local CSO will outreach to them with next steps.

Note: Case Managers set up a follow-up appointment to complete the PDT using the AP component (with an end date to match the scheduled appointment, providing adequate advance notice for the participant to complete the process), and sending an ACES General Appointment Letter (50-05) or an eJAS Appointment Letter using “WF PDT Appt” canned text in Barcode.

When using the PDT to complete a social service assessment, Case Managers WFSSS:

1. Complete the appropriate *Tracking Information* at the beginning of the PDT (*Social Service Assessment Type*).
2. Review existing PDT content with the participant, including any *Personal Pathway Details*, if applicable.
3. Review PDT *Topics* with the participant that are pertinent to the assessment.
4. If a PDT was not fully completed by previous worker (to satisfy the comprehensive evaluation requirement), cComplete those any additional PDT Topics the previous worker WFPS was not able to cover with the participant.
5. Complete the PDT *Navigation* section, determining engagement pathway and appropriate IRP activities with the participant.
6. Document the social service assessment in eJAS.

Resources

Related WorkFirst Handbook Sections

- [1.2 Required Participation](#)
- [1.6 Required Documentation](#)
- [3.1 Overview \(Tools\)](#)
- [3.2.1 Comprehensive Evaluation](#)
- [3.2.2 Personal Pathway](#)
- [3.3.1 Individual Responsibility Plan](#)
- [3.4 Case Staffing](#)
- [3.5.1 Entering Sanction & Non-Compliance Sanction](#)
- [5.1 Pregnancy to Employment](#)
- [6.2 Assessment](#)

Forms & Other Resources

- [Customer-Driven Severity Scale](#) – *only accessible to CSD staff*
- [Personal Pathway \(DSHS 11-154\)](#)
- [WorkFirst Partner Directory](#) – *only accessible to CSD staff*
- [WorkFirst Website](#)