

7.4.4.1 SSI/SSDI Transition Plan

The case manager may begin to develop a written Transition Plan with the participant early in the [SSI](#) advocacy process using the automated SSI/[SSDI](#) Transition Plan in [WWP](#). ~~This can be accessed from the [W-2 Plans Application webpage](#).~~

The Transition Plan must be developed during a face to face meeting between the [FEP](#) and the participant. Once there is a formal decision handed down from the Social Security Administration regarding eligibility for SSI/SSDI the Transition Plan should be finalized with the participant. The final Transition Plan should be issued to the participant no sooner than 90 days prior to [W-2](#) eligibility ending and reviewed regularly with the participant up until W-2 eligibility ends. The case manager must document in PIN comments when the final plan was printed and given to the participant.

7.4.4.2 Developing the SSI/SSDI Transition Plan

Circumstances will vary greatly from one family to another, requiring case managers to be resourceful as they work through the plan with the participant. Areas of need that should be addressed include:

- Emergency Needs;
- Housing Needs;
- Household Budgeting/Money Management Needs;
- Access to Economic Supports;
- Education and Training Needs (Participant and other family members);
- Legal Assistance Needs;
- Employment Support Needs with particular emphasis on work connection resources targeted at individuals with disabilities;
- Child Care Needs (for job search and work);
- Transportation Needs;
- Personal and Family Health Care Needs; and
- Other needs identified by the participant.

The Transition Plan must include at a minimum, the following elements for each need that is identified:

1. A plan of action. A short-term plan of action should help the participant address emergency or short-term needs. A long-term plan of action includes the steps necessary to carry out a goal towards self-sufficiency such as completing an education or training program or securing permanent housing; and
2. Resource and referral information for any known government and community resources that may help to address the need. The plan should explain the purpose of each resource and how it addresses or relates to the identified need.

Workers must never enter confidential information in the SSI/SSDI Transition Plan in WWP. See 4.2.2.1 for a listing of confidential information that must never be entered on WWP pages without the additional security protections.

No change to the remainder of 7.4.4.2

7.6.1 W-2 Supportive Service Plan

The *W-2* agency must offer assistance in developing a Supportive Service Plan with:

1. Applicants who withdraw their W-2 applications prior to W-2 placement. In this circumstance, the Supportive Service Plan would generally be developed between the Resource Specialist and the applicant.
2. Participants who are approved or denied a time limit extension.
3. Participants who are placed in a case management placement, including: *CME, CMF+, CMU, CMD, CMJ, CMN, CMM, CMP*, and *TSP*.

The Supportive Service Plan must be developed during a face-to-face meeting between the case manager and the applicant or participant using either:

1. The automated W-2 Supportive Service Plan in WWP. ~~This can be accessed from the [W-2 Plans Application webpage](#)~~; or
2. The paper version of the [W-2 Supportive Service Plan \(12956\)](#).

The automated plan cannot be accessed until after an applicant has been referred to *WWP*. When developing a Supportive Service Plan with an applicant who withdraws his or her W-2 application prior to placement and no referral to WWP was made, the worker must use a paper version of the plan.

If a case has been established in *CWW*, the worker must document in PIN comments when the plan was printed and given to the individual. If the paper version of the Supportive Service Plan was used the worker must also scan the form into *ECF*.

An applicant or participant may refuse the offer to develop a Supportive Service Plan. If this occurs, the refusal should be documented in PIN comments.

7.6.2 Developing the W-2 Supportive Service Plan

Circumstances will vary greatly from one family to another, requiring case managers to be resourceful as they work through the plan with the applicant or participant. Areas of need that should be addressed include:

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- Emergency Needs;
- Housing Needs;
- Access to Economic Supports;
- Household Budgeting/Money Management Needs;
- Education and Training Needs (Participant and other family members);
- Legal Assistance Needs;
- Employment Support Needs (i.e. Work Connection and Retention Services);
- Child Care Needs (for job search and work);
- Transportation Needs;
- Personal and Family Health Care Needs; and
- Other needs identified by the participant that impede the participant's ability to find and retain a job.

The Supportive Service Plan must include at a minimum, the following elements for each need that is identified:

1. A plan of action. A short-term plan of action to help the participant address emergency or short-term needs. A long-term plan of action includes the steps necessary to carry out a goal towards self-sufficiency such as completing an education or training program or securing permanent housing.
2. Resource and referral information for any known government and community resources that may help to address the need. The plan should explain the purpose of each resource and how it addresses or relates to the identified need.
3. W-2 Agency contact information.

Workers must never enter confidential information in the W-2 Supportive Service Plan in WWP. See 4.2.2.1 for a listing of confidential information that must never be entered on WWP pages without the additional security protections.

No change to the remainder of 7.6.2