Waitlist Process

1. Stephanie's team will call clients and advise them of upcoming funding opportunity. The clients will be informed of what's needed so they can start collecting docs.
2. The WL team will "Generate Funding" once all calls made. A note will be added to every file with a child being pulled from the WL in case the client calls to include:
    a. Child(ren)'s names
    b. Funding expiration date
3. For new placements:
    a. WL team will assign round robin from the queue and send an email to the case manager.
4. For sib-adds:
    a. WL team will set the child to "Pending Eligibility" and the record to "Pending Update".
    b. An email will be sent to the assigned case manager, as the record will appear in their submitted queue when complete. Email titled "Client's last name, first name Sib-add".
    c. The caseworker will create a folder on their desktop and save the emails in the folder to track in their queue.
    d. See Sib-Add handout on how to key in MOD.
5. TIP: Sort queue by SR Process—SR Status—Child Status in order to find WL families

SR Process	SR Status	in SR Status	SR Status Change Date	Child Status
Filter	Filter	Filter	Filter	pending
Update	Submitted	5	06/19/2020	Pending Eligibility
Eligibility Verification	Submitted	55	04/30/2020	Pending Eligibility

    a. Update—Submitted—Pending Eligibility: Sib-adds
    b. Eligibility Verification—Submitted—Pending Eligibility: New Placements
6. Reminder: Once a client submits the wizard the case manager has 10 days to place, term or reject the wizard.
7. Rejection process:
    a. Copy and paste all applicable bullet points from the placement rejection verbiage into the rejection. Include bullet point on the need for a provider on ALL rejections. (Since MOD does not show the selected provider until eligibility is keyed, this will help to remind families a provider is needed.)
    b. Call client and advise them of what is needed and inform them of the deadline. Inquire if client has selected a provider and has spoken with site to ensure a start date if approved for funding. Offer R&R services as needed. Remind client that when wizard is submitted, they will need a provider with a start date within 10 days of the re-submitted wizard.

    c. Write a detailed internal note:
        i. WL Rejection-Offer expiration date ________, what is being requested (elaborate as needed), indicate call made to client.
        ii. Example: WL Rejection-Offer expiration date 8/19/20, client will need 4 weeks of stubs since only 7/1/20 stub was submitted, called client and discussed docs need and funding expiration date, client also needs provider with a start date when EV is re-submitted so R&R services were offered.
        iii. Reminder-Include details in notes that will serve as a good refresher as to what occurred during submission or any details that will help a co-worker/supervisor if client calls in.
    d. If the file has to be rejected, the case manager will add their name under "Assigned Counselor" so that when it's re-submitted it will appear in their queue.

8. Placement
    a. BG8-ECON: 0-150%FPL
    b. BG8-SRMT: 151-200%FPL
9. If eligibility is determined but no provider is selected in enrollment screen:
    a. Call client to see who selected provider is.
    b. If client still does not have a provider, they will receive 10 calendar days to call back with selected provider.
    c. Notate TC and the 10-day window given to client.
    d. If client calls within 10 days, enroll child(ren) and enter P (Placement) note.
    e. If client calls after 10-day window, inactivate file, explain how to re-apply for WL, and enter detailed T (Term) note.
    f. If client never responds, WL team will close out file at the end of the pull.
10. If normal placement and enrollment goes through but child never starts at selected provider, client will have 10 calendar days from date of placement to enroll and start child. After this deadline, the client will have to re-apply to the waitlist.
    a. Example: Placement is completed on 7/2/20. Client calls after to say that child's enrollment fell through. Client will have until 7/12/20 to select another site.
11. Once placement is completed for a new client, "Assign Counselor" per alpha distribution.
12. When a determination has been made on a waitlist case (P or T), WL spreadsheet will need to be updated:
    a. Clearwater team-email WL team
    b. St. Pete team-email Lillian
    c. Need to include WL pull date?