



PH6 - RESET REFERRAL & INTAKE CHECKLIST

Participant Referral – Primary Participant Handoff

- Receive referral from Jail Staff
- Confirm Release Window (20-270 days)
- Schedule Intake Appointment
- Prepare Digital or Physical Enrollment Forms
 - Participant Intake Form
 - Priority of Service for Veterans & Eligible Spouses
 - Complaints and Grievance Form
 - Equal Opportunity Form
 - Authorization for Release of Information Form
 - Image Release Form

Intake Appointment – Initial engagement with participant and file document gathering

- Provide Program Orientation to Participant
- Explain Enrollment forms to Participant & obtain signature acknowledgements
- Conduct Intake assessment, complete form with Participant
- Inform Participant of Enrollment Determination review
- Finalize/review completeness of all documents
- Initiate Intake Eligibility Packet assembly for Enrollment Determination

Enrollment Determination Review – Submit these documents to your Administrative Reviewer

- Completed Intake Form
- Eligibility Supporting Documentation (*mixture of Self-Attestation via Intake form & Justice System documentation*)
- Date of Release Verification
- Date Calculator printout verification
- Selective Service Registration documentation (if applicable)

Enrollment Determination Approval Notification – Schedule Participant IDP Assessment

- Receive Administrative Reviewer's Approval Notification
- Schedule Participant's IDP Assessment within 30 days of AR's notification
- Optional: Add new participant to GPMS **without** entering a Qualifying Service (IDP)*
- Conduct IDP assessment form with Participant
- Obtain IDP Signature acknowledgements
- Inform Participant of Pre-release services they're expected to receive
- Establish Workshop Schedule, as applicable



PH6 - RESET PROGRAM ENROLLMENT CHECKLIST

Program Enrollment – GPMS Data Entry & Required Documentation Uploads

- Participant Intake Form
- Priority of Service for Veterans & Eligible Spouses Form
- Complaints and Grievances Form
- Equal Opportunity Form
- Authorization for Release of Information Form
- Image Release Form
- Approved Enrollment Determination Form
- Eligibility Supporting Documentation (*mixture of Self-Attestation via Intake form & Justice System documentation*)
- Date of Release Verification
- Date Calculator printout
- Selective Service Registration documentation (if applicable)
- Intake Case Note
- IDP Upload
- IDP Case Note
- Inform MIS of Enrollment (*Initiates MIS Transmittal to SCW*)

Case Notes – Must Be Entered Within 14 Calendar Days & Must Include

- Correct GPMS Category
- Date of Contact &/or Service
- Purpose of the Meeting
- Actions taken in the Meeting
- Outcomes of the Meeting
- Next Steps after the Meeting
- Medical/Disability Information is Redacted from GPMS Case Note
- INTAKE CASE NOTE:** Skills Gap Observations & Planned Post-Release Assessments



PH6 - RESET FILE DOCUMENTS CHECKLIST

Required File Documents– GPMS Data Entry & Required Documentation Uploads

- Participant Intake Form
- Intake Case Note
- Priority of Service for Veterans & Eligible Spouses Form
- Complaints and Grievances Form
- Equal Opportunity Form
- Authorization for Release of Information Form
- Image Release Form
- Approved Enrollment Determination Form
- Eligibility Supporting Documentation *(mixture of Self-Attestation via Intake form & Justice System documentation)*
- Date of Release Verification
- Date Calculator printout
- Selective Service Registration documentation (if applicable)
- Initial IDP & Revisions Uploads
- Educational Assessments
- Supportive Services Entries
- Supportive Services Case Notes
- Workforce Development Services Entries
- Workforce Development Case Notes
- Trainings Entries
- Trainings Case Notes
- Trainings Outcomes
- Program Exit Entries
- Program Exit Case Notes
- Follow-Up Entries
- Follow-Up Supportive Services Entries, as applicable
- Supportive Services Documentation Uploads
- Workforce Development Documentation Uploads, as applicable
- Training Services/Outcomes Documentation Uploads
- Follow-Up Documentation Uploads



PH6 - RESET POST-RELEASE CHECKLIST

Post Release– GPMS Data Entry & Required Documentation Uploads

- Confirm release and make live contact with Participant
- Update GPMS Criminal Justice tab Q65a & Q65b
- Safety/Stability Check: Lodging, food, transportation, phone
- Issue Supportive Services, as applicable
- Document & Case Note Supportive Services, as applicable
- IDP Review & Revision with Participant
- IDP Revision Case Note Entry
- Establish WorkSource appt within 48hrs of release, enter case note
- Provide referrals to community partners, enter case note
- Prepare Supportive Services: ID/DL; Medical/Food benefits, enter case note
- Enter Training Services aligned with IDP, enter case note
- If Employed:** Enter Employment Outcomes & upload verification, enter case note
- Submit/Notify MIS Post-Release Transmittal



PH6 - RESET PROGRAM EXIT CHECKLIST

Program Exit – GPMS Data Entry & Required Documentation Uploads

- Confirm no further core (qualifying) services are scheduled in applicable Services tab
- Open File & gather recent services, outcomes, and notes to prepare Exit form
- Determine Exit Modality: **Standard Auto-Exit** or **Exclusion Exit**
- Complete Participant Exit Form
- Enter Outcomes via applicable Services tab: Employed, Credentialed, or MSG Earned
- Upload Outcomes Documentation within applicable Services tab
- Standard Exit:** No action required, allow Auto-Exit
- Exclusion Exit:** Manually enter Exit
- Upload Exit Form in Documents tab
- Enter Exit Case Note
- Submit/Notify MIS Exit Transmittal