

INITIAL ASSESSMENT (IM-309I) FORM – Electronic Only

PURPOSE

- To obtain basic information of the individual's skills, prior work experience and employability for each applicant/recipient who is at least 18 years of age or has not completed high school (or equivalent) and is not attending secondary school as outlined in the state statutes and regulations.
- To determine if the individual is:
 - Exempt from work participation,
 - Temporarily excluded from work participation, or
 - Employment and training ready to be referred to the Division of Workforce Development (DWD).
- Determine if a currently domestic violence issue exists.

NUMBER OF COPIES AND DISTRIBUTION

Only an original is required. Provide a copy to the individual if requested. Retain the form permanently in the case record.

GENERAL INSTRUCTIONS FOR COMPLETION

Individuals applying for Temporary Assistance will complete the Initial Assessment form at application. The Initial Assessment form can be completed by the individual and then reviewed with the caseworker. The form can also be completed online with the caseworker and individual while going through the control flow.

Discuss each section with the individual and answer any question the individual may have regarding the client's statement at the top of the form or any of the requested information.

NOTE: An individual will NOT be referred to DWD for any component until the Initial Assessment (IM-309I) is completed.

CLIENT'S STATEMENT OF UNDERSTANDING AND SIGNATURE

The statement of understanding explains the purpose and confidentiality of the information provided on the Initial Assessment form. Request the individual to review the client statements. The caseworker should answer any questions the individual may have regarding the paragraph. The individual's signature and date as well as the caseworker's signature and date are required.

PRIOR WORK EXPERIENCE

This section provides information about prior paid and unpaid work experience.

SKILLS

The individual's skills are listed in this section.

EMPLOYABILITY

The individual should list any reason s/he believes they cannot participate in work activities, if applicable. The caseworker must discuss these reasons with the individual.

DOMESTIC VIOLENCE

This section captures information about current domestic violence issues.

After the Initial Assessment form is completed and reviewed with the caseworker and the individual, the work requirement indicator should be determined. Complete the gray section at the top of the form and enter the correct work requirement indicator in FAMIS.