

EXTENSION OR CLOSING SUMMARY

PURPOSE: To provide to the designee a summary of the self-sufficiency case manager and team's recommendation whether to close or extend a family beyond their 60-month lifetime limit.

NUMBER OF COPIES AND DISTRIBUTION: One copy for the designee and one copy for the case record. Retain the form permanently in the case record.

INSTRUCTIONS FOR COMPLETION: The self-sufficiency case manager should fill out the form to submit to the designee. All entries should be filled in to give a complete summary for the designee to make a decision.

CASE RECOMMENDATION: The self-sufficiency case manager will check the appropriate recommendation to **close the case** or to **extend the case**.

WAS THE CLOSING OR EXTENSION PLAN A TEAM DECISION? This question will advise the designee whether a team was part of the decision. A team review is not required when participant verbally refuses to cooperate.

RECOMMENDATION SUMMARY: The team or self-sufficiency case manager will summarize why the case supports being closed or extended. This recommendation will give the designee information to make his/her decision.

RECOMMENDATION IS FOR THE FOLLOWING EXTENSION: The reason for the extension will be one or more of the allowable hardships, determined by the team and/or the self-sufficiency case manager.

WHAT REFERRALS WERE OFFERED AND THE DATE OF REFERRAL?: List the referrals and the date of the referral that the self-sufficiency case manager gave to the individual or the referrals the team recommended during the review.

RECOMMENDED DATE OF NEXT EVALUATION: Enter the date for the next evaluation determined by the team.

DESIGNEE HAS REVIEWED AND HAS MADE THE FOLLOWING DECISION: The Designee checks the box **case closed** or **approved to extend** after reviewing all the information received to make a well-informed decision.

DESIGNEE COMMENTS: The designee will give a short narration why he/she supports the above decision.

DESIGNEE SIGNATURE AND DATE: The designee must sign and date.