



Pennsylvania  
**Department of Human Services**

**DATE:** **March 6, 2025**  
January 17, 2025  
December 31, 2024

**OPERATIONS MEMORANDUM # 24-12-02**

**SUBJECT:** **Revised** Agreement of Mutual Responsibility (AMR) **and Employment Development Plan (EDP)** Telephonic Signature

**TO:** Executive Directors

**FROM:** Robert Hixson  
Director  
Bureau of Operations

**PURPOSE**

To inform County Assistance Offices (CAOs) that they must offer the option to orally sign and initial the AMR **and EDP** pages during a telephonic interview by following the procedures outlined below.

**BACKGROUND**

Temporary Assistance for Needy Families (TANF) requires each member of the budget group who is required to sign the Application for Benefits (PA 600) to complete and sign the AMR. Completion of the AMR is required at application, renewal, partial renewal, and when there is a change in circumstances. An individual who refuses to complete or sign the AMR without good cause is ineligible for TANF cash assistance and Refugee Cash Assistance. For Extended TANF (ETANF) the entire budget group is ineligible. Currently, individuals may choose to sign the AMR by e-mail, in person, or through regular postal service.

**Individuals receiving Supplemental Nutrition Assistance Program (SNAP), but not TANF, may volunteer for the SNAP Employment and Training (SNAP E&T) program. If an individual volunteers for SNAP E&T, the caseworker at the CAO must review and complete an EDP with an individual to determine the best-fit SNAP E&T provider to refer the individual to. Completion of the EDP is required at initial enrollment and any change in the E&T provider during their E&T participation. Currently, individuals may choose to sign the EDP by e-mail, in person, or through regular postal service.**

## **DISCUSSION**

Effective immediately, all Cash Assistance applicants and recipients who are required to complete an AMR or Diversion Agreement Form can opt to orally sign and initial appropriate sections telephonically. **Additionally, SNAP E&T participants who complete the EDP can opt to orally sign and date the form.**

## **PROCEDURES**

The CAO can receive an individual's oral attestation of the AMR, ~~or~~ Diversion Agreement Form, **or EDP** information, including the individual's signature, over the phone. The CAO will narrate that the individual's identity was verified using the last four digits of the Social Security Number, Date of Birth, Address, and phone number. The CAO will document the oral attestation on the AMR, ~~or~~ Diversion Agreement form, **or EDP** and in the case narrative to show that the individual has orally signed and initialed the appropriate sections of the AMR, ~~or~~ Diversion Agreement form, **or EDP**.

### **The narrative must state the following for an AMR:**

"[Applicant/recipient's name] has orally signed the AMR and orally attested to:

- Understanding their responsibility – page 1
- Their plan – pages 2 and 3
- Their rights, good cause, and the acknowledgement statement – page 3
- Their acknowledgement of penalties – page 4."

### **The narrative must state the following for a Diversion Agreement Form:**

"[Applicant's name] has orally signed the Diversion Agreement form and orally attested to:

- Understanding their responsibility and the acknowledgement statement."

### **The narrative must state the following for an EDP:**

"[Recipient's name] has orally signed the EDP and orally attested to:

- **Assessment – page 1**
- **Their Enrollment Status and Required Hours – page 2**
- **Their Goal and Services Required – page 2**
- **Their Rights and Responsibilities – page 2."**

Completing an Agreement **or EDP** through DocuShare and mailing locally, the CAO will:

1. Read and review each Agreement **or EDP** section with the applicant/recipient. If the Agreement **or EDP** is completed in a non-English language, the CAO will read the Agreement **or EDP** sections to the individual through an interpreter.
2. Enter "oral signature" in each initial/signature section.
3. Scan the orally signed Agreement **or EDP** to Imaging.
4. Send the orally signed Agreement **or EDP** to the applicant/recipient.
5. Send the orally signed Agreement **or EDP** to the work contractor if applicable.
6. Enter the oral signature narrative provided above. If the Agreement **or EDP** was completed in a non-English language, the narrative must also include that the oral signature process was explained to the applicant/recipient through an interpreter.

Completing an Agreement **or EDP** through the Electronic Client Information System and mailing centrally, the CAO will:

1. Read and review each Agreement **or EDP** section with the applicant/recipient. If the Agreement **or EDP** is completed in a non-English language, the CAO will read the Agreement **or EDP** sections to the individual through an interpreter.
2. **AMR:** In the Agency Assistance and Referrals block of the AMR enter "*The individual is orally signing and initialing this document during the telephone interview on (DATE)*".  
**EDP:** In the 12-Month Goal block of the EDP enter "*The individual is orally signing and initialing this document during the telephone interview on (DATE)*".
3. Save orally signed Agreement **or EDP** as a Portable Document Format (PDF) to be scanned to the record and sent to the work contractor, if applicable.
4. Send orally signed Agreement **or EDP** centrally to applicant/recipient.
5. Enter the oral signature narrative provided above. If the Agreement **or EDP** was completed in a non-English language, the narrative must also include that the oral signature process was explained to the applicant/recipient through an interpreter.

If the individual or other household members opt out and choose to complete the AMR, ~~or~~ Diversion Agreement form, **or EDP** by mail, it must be returned within 30 days from the date of the CAO signature on the AMR or Diversion Agreement Form, **or 15 days from the date of the CAO signature on the EDP**. Their decision to complete the AMR, ~~or form~~ Diversion Agreement Form, **or EDP** by mail **must** be narrated. ~~If~~ **For TANF, if the AMR is** not returned within 30 days, the applicant/recipient who failed to complete the AMR is ineligible for TANF. In ETANF cases, the entire household is ineligible if the applicant/recipient fails to complete the AMR. If the applicant fails to return the Diversion Agreement form within 30 days, they must either reapply or request

a reconsideration. For SNAP E&T, if an EDP is not returned within 15 days, the individual will not be referred to a SNAP E&T program and the reverse referral, if applicable, will be denied and sent back to the originating SNAP E&T provider. However, since SNAP E&T is voluntary, the individual will not be subject to sanction or overpayment.

It is important that the CAO follow this procedure in detail. If there is an unsigned AMR or Diversion Agreement form in Imaging that is not annotated as orally signed and/or the narrative is missing, this will constitute an incorrect eligibility authorization with an overpayment for the household.

### **NEXT STEPS**

1. Share and review this information with appropriate staff members.
2. Direct questions regarding this Operations Memorandum (Ops Memo) to your Area Manager.
3. This Ops Memo becomes obsolete when updates are incorporated in the handbook.