ADDING A CUSTOMER TO TWIST WIA ADULT FUND*

Desk Aid

1. Click on **Customer Information Icon**.	
2. Enter **Social Security Number.**	If "No Customer with the Name/SSN" appears, verify the SSN. If correct, enter customer in WIT. Return to TWIST, repeat step 2.
3. At the **Identity** tab, verify information populated from WIT: Birth Date; Mailing Address (enter "Same" in the Residence field if it's the same as the mailing address, or enter the correct address); Phone Number; County Code; City Code.	Save
4. Click on **Characteristics** tab. Ensure the **Specialized Services** radio button is checked.	
5. Verify **Gender**, **Citizenship**, and **Ethnicity**. If male and born on or after January 1, 1960, click **Selective Service** box and enter number.	Verify selective service registration at www.sss.gov Save
6. Click on **Education** tab. Enter **Highest Grade** completed.	Save
7. Click on **Employment Status** tab. If the customer is employed, check the **Employed at Application** box. Enter the number of months worked in the last 24 months.	Save
8. Click on **Program Detail** under **Menu Selection**.	In the gray area on the right side of screen, right click the mouse and select **Add** to add a record.
9. Enter: **Program Type:** WIA **Application Date:** Date customer & counselor agreed to a series of continuing expanded services. **Eligibility Date:** Date customer & counselor agreed to a series of continuing expanded services. **Office 3, 4 & Staff** (if information is not defaulted from staff profile or is incorrect).	Click OK Save **Note: You now have a WIA Record**
10. Click on the "+" sign on the left side of **Program Detail**.	
11. Click on the **WIA record** with the red check.	
12. Enter **Assessed & Approved for Intensive Service Date:** This should be the same as the Application and Eligibility Date	Save

13. Click on the **Exemption** Tab.	
14. Click on **Adult Income Exempt**.	Save
15. Click on the **Documentation** Tab.	
16. Right click the mouse and add: Criteria: **1 Social Security Number** Documentation Source: **178 - Self Certification*** Criteria: **2 Birth Date /Age** Documentation Source: **178 - Self Certification*** Criteria: **3 Citizenship/Alien Status** Documentation Source: **178 - Self Certification*** Criteria: **24 Income Exempt*** Documentation Source: **176 – Income Exempt** ***<u>If Required</u>*** Criteria: **4 Selective Service** Documentation Source: **173 – Internet Verification**	Save
17. Click on **Service Tracking**.	
18. Right click the mouse and select **Add**. Add appropriate service for the customer, usually: **Service Category:** 3 Job Search Services* **Service:** 12 Job Search Assistance/Job Search* Enter: **Start Date, Planned End Date, County Code, City Code.**	Save
19. Right click the mouse and select **Add** to add entry in lower portion of screen in the **Fund Detail** area. Select **Fund: 95 – WIA Adult or 96 – WIA Dislocated Worker.** The **Start Date** automatically populates. Click **OK**.	Save

* Customers receiving financial aid will have the appropriate TWIST information as required in The Financial Aid Policy. A customer who is receiving financial aid over the amount of $200 during a twelve month period must provide documents - as required in the Financial Aid Policy - as proof of eligibility for the financial aid. Self attestation is not usually sufficient.

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