PROCESSING AND RECORDING CUSTOMER INFORMATION

NATIONAL WORKFORCE INSTITUTE

Processing and Recording Customer Information

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TWIST is another of the components of the Workforce Solutions Management Information System. It's used to record and track information on customers who have chosen to receive a series of continuing and expanded services from Workforce Solutions and:

- Are required to work with Workforce Solutions to receive TANF (identified in TWIST as Choices)
- Are required to work with Workforce Solutions to receive Supplemental Nutrition Assistance
- Are not required to work with Workforce Solutions (identified in TWIST as WIOA)

While the Program Tracking Specialist (PTS) and the Call Center staff are responsible for entering most of the customer data in TWIST, it is your responsibility to:

- Provide an orientation for job ready customers who are required to work with Workforce Solutions to receive TANF or Supplemental Nutrition Assistance, and customers responding to worker profiling outreach.
- Record or copy/paste the information gathered from the Workforce Solutions Job Search Map into counselor notes in the customer's record in TWIST.
- Create a record and add services in TWIST for job ready customers who have chosen to receive a series of continuing and expanded services but are not required to work with Workforce Solutions.

Before creating a record in TWIST, the customer should be registered in WorkInTexas.com, if you will be using funds other than TANF or SNAP, and have a Work Application Addendum on file (if they are looking for work). Workforce Solutions has several sets of funds to pay for staff-assisted services to all our customers. Workforce Investment and Opportunity Act (WIOA), Wagner-Peyser (ES), Supplemental Nutrition Assistance Program (SNAP), and Temporary Assistance to Needy Families dollars all pay for staff-assisted services to our customers.

Tagging Customers WIOA – Adult or Dislocated Worker

The Work Application Addendum serves as supporting documentation for tagging customers as WIOA – Adults or Dislocated Workers and/or eligibility for the Veterans' preference. Use the Addendum as supporting documentation when:

- You deliver an expanded service to a customer who is not required to work with us (customers who have applied to receive, or are tagged as TANF/ Choices and customers tagged as SNAP E&T are required to work with us).
- You provide less than $200 in financial aid within a 12 month period to any customer other than those required to work with us.
- A customer identifies him/herself as a veteran or veteran's eligible spouse.
- You want to tag a customer as a WIOA – Adult or Dislocated Worker for any other reason.

Use the following guidelines with the customer's completed Work Application Addendum to determine if you can tag her as WIOA – Adult, and/or Dislocated Worker.

You must have a copy of the customer's driver's license or government-issued ID and a completed Addendum to tag her WIOA.

WIOA – Adults

- The customer must sign the addendum and check one or the other of the boxes: ☐ US Citizen or ☐ Authorized to work in the U.S.
- The customer must check the box "18 years or older" ☒ Yes, and allow you to make a copy of her driver's license or other government-issued photo ID.The photo ID must show the customer's age as 18 years or older. Staff must keep a copy of the customer's driver's license attached to the addendum.
- If the customer is a male born after January 1, 1960, verify the customer has registered with Selective Services (www.sss.gov) check, sign and date the staff box at the bottom of the Addendum. *You may not tag a male customer required to register for the draft as "WIOA" until the customer has registered (before his 26th birthday)or the staff person has determined that the customer did not "knowingly or willfully" fail to register.*
- The customer must answer "No" to the question "Are you presently employed" OR
- She must answer, "Yes" to the question "If you are employed, do you believe that you need services from Workforce Solutions to help you get a better job or keep a job to support yourself and your family?"

All customers who answer the questions as noted above should be tagged WIOA- Adults. Remember, you may also tag some of them as WIOA- Dislocated Workers.

WIOA Dislocated Worker - unemployed customers

Tag the customer as a WIOA - Dislocated Worker if she checks the following on the Addendum – and you can document her eligibility:

- Are you presently employed? 1 No
- "Have you been unable to find work in your most recent occupation or industry?" 1 Yes
- Do you believe that you have been unsuccessful in your job search to date, because of any one of the following?

  A need for more basic education ☐ Yes

  A need for additional job skills ☐ Yes

  A need for improved job search skills ☐ Yes

You must attach - to the Addendum - documentation of the customer's eligibility i.e., WIT screen (dollar sign in red background) or other TWC information showing the RRES participation, exemption or orientation, TWC UI screen, employer letter, or public notice of a lay-off. You may use any of the documents listed in the Dislocated Worker Desk Aid under category 1.

WIOA Dislocated Worker - employed customers

The Addendum for an employed Dislocated Worker will have "Yes" marked to the question "Are you presently employed?" The customer must also check "yes' to all three questions:

- "Have you received notice of a lay-off from your present job?" ☒ Yes
- "If you are employed do you believe that you need services from Workforce Solutions to help you to get a better job, or keep a job to support yourself and your family?" ☒ Yes
- "Have you been unable to find work in your most recent occupation or industry?" ☒ Yes

You may use the Addendum as the customer's self-attestation to her/his impending lay off to provide expanded service or no more than $200 in financial aid during a 12 month period. If the customer has an employer letter, or public notice indicating an anticipated lay off, copy the document and attach it to the Addendum for file. You may need it later if the customer requests additional aid.

When a customer wants to change an answer to a question on the Addendum, ask the customer to:

- Strike through the incorrect answer
- Enter the correct answer, and
- Initial the change.

The Workforce Solutions Orientation Process

Customers who come to the career office for the first time are offered an orientation that informs them of Workforce Solutions services. All orientations emphasize how to make the most of career office resources/services to get a job, keep a job, or get a better job. Information provided in the orientation includes:

- An introduction to Workforce Solutions
- The number and locations of Workforce Solutions offices
- Services available in the offices
- Workshop calendar

The focus of all orientations is to familiarize the customer with resources available at Workforce Solutions and start her on her job search.

Customers who have a responsibility to look for work to receive government benefits are provided with additional information during orientation. The nature of this information depends on the funds used to pay for services. If you are conducting the orientation, you need to understand the differences so you can provide the correct information and process the appropriate forms for your customer.

Use the orientation checklist to guide you through the different types of orientations.

Additional Orientation Information for Customers Who Have Applied for TANF or who are Tagged as TANF/Choices

The Texas Health and Human Services Commission requires certain customers -- who have applied for or are receiving Temporary Assistance for Needy Families -- receive job search services provided through Workforce Solutions. They must participate in job search-related activities for a pre-determined number of hours per week to maintain their benefits. The number of hours varies depending on their individual circumstances. If you are providing an orientation for customers who have applied for or are receiving TANF:

- Give them the Workforce Solutions brochure with the Facts on TANF Family Employment Plan. The Workforce Solutions brochure and Family Employment Plan are kept in stock in your office.

- Determine the number of hours the customer must participate, and write this on the customer's brochure. See pages 7-14 to 7-16 for assistance.

- Use the TANF Orientation and Assessment Checklist, and the PowerPoint slides, if desired, to ensure you properly complete the orientation. The TANF Orientation and Assessment Checklist is in the Appendix of this manual. An e-version can be downloaded from the Staff Resources section at www.wrksolutions.com. The PowerPoint slides are also located in the Staff Resources section at www.wrksolutions.com.

- Complete a Job Search Map and copy/paste it into Counselor Notes in TWIST.

  Discuss with the customer:

  - The type of employment the customer is seeking and the responsibilities to which she is agreeing.
  - If this is a 2-parent family, both adults must attend the orientation and sign the Two-parent Family Employment Plan.
  - A family can receive TANF for a total of 5 years (60 months)
  - Texas limits how long a family can receive TANF based on the customer's education and work experience. Once the Texas time limit is met, the family has to wait five years before it can reapply for TANF.
  - Customers must look for work or participate in activities arranged by Workforce Solutions staff.
  - They must accept job referrals from staff, and report any changes in circumstances immediately.

- They must report participation hours every Monday, and let us know if there is a reason they can't participate or report hours. This is like calling in sick for work.
- They must do their best to keep a job once they get one.
- We may be able to help with some support services, such as child care, transportation, and clothing.
- If the customer doesn't meet these requirements and doesn't have a good reason for not meeting them, we let HHSC know and they will stop TANF cash benefits and Medicaid for one month. All support services Workforce Solutions provides will be stopped. Customers will have an opportunity to restart benefits by reporting cooperation for the following month. If they don't they will have to reapply for benefits with HHSC.
- Be sure to review the Job Search Log and Counting Your Time for Job Search with the customer and give them a copy of each. (In this Appendix and available on www.wrksolutions.com).
- If the customer is job searching, she must document the contacts on the job search log.
- If the customer is not working after three weeks she will be asked to come in and have a discussion with a PSR about her next step. Depending on her circumstance a community service spot may be arranged to help develop or sharpen her job skills.
- If, at any time, you feel the customer is not job ready, escort her to a PSR. The PSR will finish the orientation and stamp her referral form. You may also set an appointment for the customer with the PSR to develop the appropriate plan.

For more information on the TANF/Choices rules refer to www.wrksolutions.com.

The customer should leave the orientation with:

- Stamped HHSC referral form (2588) (Only stamp it after you've helped her with her job search)
- Copy of the Family Employment Plan
- Copy of the Job Search Map
- Copy of any referrals you were able to give
- Copy of the Orientation to Complaint form
- Any tip sheets relevant to the customer's circumstances
- A copy of the Job Search Log and How to Count Your Hours for Job Search, Verification of Hours form, if necessary, Supervised Job Search sheet, and Self-Employment Enterprise Verification form.

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If the customer is job ready, you may provide job search assistance at this time. Start with a discussion about the type of work the customer is seeking. Remember to use the tools discussed in Module Two. At the conclusion of your conversation, stamp the HHSC form. The stamped form notifies HHSC the customer attended the orientation at Workforce Solutions. Give the customer a contact number and schedule a follow-up appointment to bring in the completed job search log. Provide specific instructions on when, how, and to whom she is to return the job search log. Record this information on the Job Search Map and give it to her. Thank the customer for coming in, tell her you look forward to working with her, and wish her success on her first week of job search.

Give the following paperwork to the Program Tracking Specialist:

- Signed paper Work Application (if applicable)
- Signed Orientation to Complaint form
- Copy of the signed Family Employment Plan
- Copy of the Workforce Solutions Job Search Map (in Counselor Notes)
- Copy of a stamped HHSC referral form

Copy and paste the Workforce Solutions Job Search Map into the counselor notes in the customer's record in TWIST.

Additional Orientation Information for Customers Tagged as SNAP E&T

The Texas Health and Human Services Commission requires certain customers – who have applied for or are receiving Supplemental Nutrition Assistance – receive job search services provided through Workforce Solutions. They must participate in job search-related activities for a certain number of hours per week to maintain their benefits. The number of hours varies depending on their individual circumstances. Customers required to participate are categorized by HHSC as:

- General population, or
- Able-Bodied Adults without Dependents (ABAWDs)

If you are providing an orientation for customers who have applied for or are receiving Supplemental Nutrition Assistance:

- Give them the Workforce Solutions brochure with the Facts on SNAP Family Employment Plan. The Workforce Solutions brochure and Family Employment Plan are kept in stock in your office.
- Use the information on page 7-14 to 7-16 of this manual to determine the number of hours the customer must participate.
- Use the SNAP Orientation and Assessment Checklist, and the PowerPoint slides, if desired, to ensure you properly complete the orientation. The SNAP Orientation and Assessment Checklist is in the Appendix of this manual. An e-version can be downloaded from the Staff Resources section at www.wrksolutions.com. The PowerPoint slides are also located in the Staff Resources section at www.wrksolutions.com.
- Complete the Job Search Map and paste into TWIST Counselor Notes.

Discuss with the customer:

- The type of employment the customer is seeking and the responsibilities to which she is agreeing.
- Customers must look for work or participate in activities arranged by Workforce Solutions staff.
- They must accept job referrals from staff, and report any changes in circumstances immediately.

- They must report participation hours every Monday, and let us know if there is a reason they can't participate or report hours. Think of it like calling in sick for work.
- They must do their best to keep a job, once they get one.
- We may be able to help with some support services, such as child care, transportation, and clothing.
- If the customer is single and childless and has not found a job after four weeks we will arrange a community service job to develop or sharpen job skills.
- If the customer doesn't meet these requirements and doesn't have a good reason for not meeting them, we let HHSC know and they will stop SNAP benefits, and all support services Workforce Solutions provides will be stopped.
- If the customer is job searching, she will need to provide documentation of the contacts she makes. Review the Job Search Log and Counting Your Time for Job Search with the customer and give them a copy of each. (In this Appendix and available on www.wrksolutions.com).
- If, at any time, you feel the customer is not job ready, escort her to a PSR. The PSR will finish the orientation and stamp her referral form. You may also set an appointment for the customer with the PSR to develop the appropriate plan.
- Let the customer know that when she returns her documentation of cooperation she will have to speak with someone.
  - The customer should leave the orientation with:
  - Copy of the Family Employment Plan
  - Copy of the Job Search Map
  - Copy of any referrals you were able to give
  - Copy of the Orientation to Complaint form
  - Any tip sheets relevant to the customer's circumstances
  - A copy of the Job Search Log and How to Count you Hours for Job Search, Verification of Hours form, if necessary, and Supervised Job Search sheet.

Give the following paperwork to the Program Tracking Specialist:

- Copy of the signed Employment Plan
- Copy of the Workforce Solutions Job Search Map
- Signed Orientation to Complaint form

Cooperation Requirements

Some customers of Workforce Solutions are required to participate in countable, allowable services a specified number of hours per week. These customers include Temporary Assistance for Needy Families (TANF) and SNAP recipients. The number of hours required to cooperate depends on the individual or family situation.

The two charts below show the allowable activities for customers receiving TANF or SNAP.

TANF Activities Classified for Cooperation
Job Search and Job Readiness • Supervised and self-directed job search • Job search and job readiness seminars, classes, etc. • Job development and job placement • Substance abuse or mental health counseling
Work • Unsubsidized employment, including self-employment • Subsidized employment • Volunteer work (community service, unpaid work experience, workfare)
Education and Training • Vocational training • Basic skills

SNAP E&T Activities Classified for Cooperation
Job Search and Job Readiness • Supervised and self-directed job search • Job search and job readiness seminars, classes, etc. • Job development and job placement
Non-vocational and Vocational Education & Training • Basic education (literacy, ABE/GED, ESOL) • Post-secondary occupational training • Other non-vocational education
Work • Workfare (allowed for ABAWD only) • Work Experience - paid or unpaid (allowed for General Population only) *NOTE:* Unsubsidized employment does not count for cooperation unless it is combined with one of the other activities. You may, however, subtract the hours of unsubsidized employment from the number of required hours of cooperation.

The following chart displays customer situations and the corresponding cooperation requirements.

WORKFORCE SOLUTIONS
BASIC PARTICIPATION REQUIREMENTS FOR COOPERATION

	Family Situation	Cooperation Requirement (Total average hours)	Core Activities (minimum time required)	Non-Core Activities (maximum time allowed)
TANF	***Single-parent with a child age six and over****	30 hours/week	20 hrs/week	10 hrs/week
	Single-parent with a child under age six*	20 hours/week	20 hrs/week.	NA
	Two-parent family without child care One or both parents cooperate to meet the requirement	35 hours/week	30 hrs/week	5 hrs/week
	Two-parent family with child care Both parents may cooperate to meet the requirement and the hours may be split among the two.	55 hours/week	50 hrs/week	5 hrs/week
	Teen head of household attending school (middle school, high school, GED classes) Attending school means the customer is enrolled in middle school, high school or GED classes. Teens attending school satisfactorily count as 20 hours or actual hours, whichever is greater. These hours are non-core	Teen must have satisfactory school attendance. During summer break, she must cooperate a minimum of 20 hours per week.	NA	NA
	Teen head of household not attending school without GED or diploma A teen not attending school must be participating in other educational activities for 20 hours.	20 hours/week	NA	20 hours/week in other educational activities
	Disabled or caring for a disabled child or adult in the household The family member no longer needs to attend school full- time to exclude a parent caring for a disabled family member.	Customer must cooperate the amount of time allowed by a physician – as stated on HHSC Form 1836A/B	Required time is shown in TWIST/TANF History & Form 1836 A/B	Required time is shown in TWIST/TANF History & Form 1836 A/B

* Until you are able to verify a child's age in TWIST or TIERS, take the customers word and make necessary adjustments if you receive contrary information later. Enter a TWIST counselor note and have the customer sign a new agreement if the new information changes her requirement.

WORKFORCE SOLUTIONS
BASIC PARTICIPATION REQUIREMENTS FOR COOPERATION

	Family Situation	Cooperation Requirement (Total average hours)	Core Activities (minimum time required)	Non-Core Activities (maximum time allowed)
TANF	***Sanctioned family***	Demonstrate cooperation in month after noncooperation; Hours/week are set according to family situation when not sanctioned.	Total hours per week set according to family situation when not sanctioned. See above.	Total hours per week set according to family situation when not sanctioned. See above.
	Conditional applicants have minimum-hour requirements for the prorated week based on their normal participation requirement Customer has 40 days from the date of referral from HHSC to attend orientation and demonstrate cooperation for 4 consecutive weeks.	Total hours per week set according to family situation when not sanctioned. See above. Customer must attend a workforce orientation, sign a new employment plan and demonstrate cooperation for four consecutive weeks.	Total hours per week set according to family situation when not sanctioned. See above.	Total hours per week set according to family situation when not sanctioned. See above.
	Exempt(Volunteer) parents or caretakers ***Children under six years*** ***Children six years and older***	 20 hours/week 30 hours/week	 20 hours/week 20hours/week	N/A 10 hours/week

WORKFORCE SOLUTIONS BASIC PARTICIPATION REQUIREMENTS FOR COOPERATION				
Family Situation		Cooperation Requirement (Total average hours)	Core Activities (minimum time required)	Non-Core Activities (maximum time allowed)
SNAP E&T	***ABAWD Mandatory and Exempt (Volunteer)***	*30 hours/week* • If in Workfare, FLSA determines required hours. • If Exempt volunteer and working 20 hours per week or more, additional hours in other activities up to a total of 30.		
	General Population Mandatory and Exempt (Volunteer)	30 hours/week up to 120 hours per month, including hours in unsubsidized employment • If exempt and working full-time, the volunteer can cooperate for an agreed upon total number of hours less than 30 per week. • If exempt and working part-time, volunteer can participate in activities to reach a total of 30 hours per week (part-time work plus Workforce Solutions service).		

Additional Orientation Information for Customers Responding to Worker Profiling Outreach

The Worker Profiling System assigns a score to most Unemployment Insurance (UI) benefit recipients when the customer receives her first UI payment. It is believed that the higher the score, the more likely the customer is to exhaust her UI benefits before finding work. Workforce Solutions sends a letter to each of these customers inviting them to contact the career office for services. Workforce Solutions staff should offer every customer responding to these letters help in finding work. These customers may respond in person, by telephone, or email to letters sent to them through the Worker Profiling system.

Note: If a customer fails to respond to the Worker Profiling recruitment letter or if the response is not noted the customer may lose her UI benefits. When the customer responds, you must document the response in WorkInTexas adding the service: RRES Orientation. If this information is not entered, it will negatively affect the customer's UI benefits.

Other Orientation Information

For more information on orientations and for practicing conducting orientations, sign up for the <u>Conducting Customer Orientations</u> practicum.

You may be expected to review the customer's completed Job Search Log. For information, refer to WFS Cooperation Rules and Procedures and sign up for the <u>Reviewing Customer Job Search</u> practicum.

Entering Customer Information in TWIST

Some customers may ask for a continuing series of services that go beyond just the basics. For example, a customer that comes to Workforce Solutions and asks to see you on a regular basis seeking job search advice, specific labor market information, or detailed career counseling may be a good candidate for expanded services. For these customers and customers whom you provide short-term support services, a record in TWIST must be established. In this instance, make sure you have an addendum to the work application on file. The addendum is required to create a WIOA-funded Program Detail in TWIST. You may be responsible for performing the following functions in TWIST:

- Create a WIOA record (Program Detail) if none exists*
- Add services
- Enter short-term support services
- Enter subsequent services including employment
- Record counselor notes
- Close records

* A *Program Detail is established by the Program Tracking Specialist for:*

- *TANF Applicant/Choices/Choices Plus*
- *SNAP*

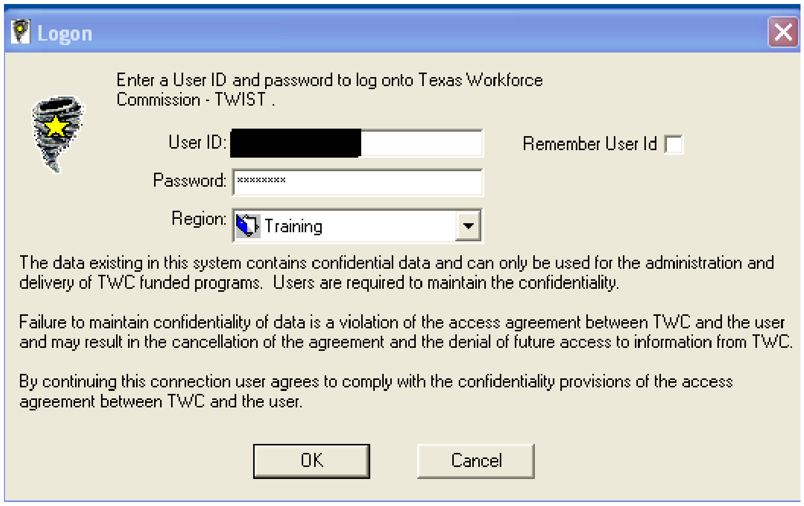
The only Program Detail you may create is for customers whose expanded services will be paid for with WIOA funds.

TWIST Basics

The Workforce Information System of Texas

Use TWIST to record information on customers who need more than basic services.

Login to TWIST



To login to TWIST, double click on the **TWIST icon** on the desktop. The logon window displays.

Alternatively, you can go to Start (on the bottom left of the desktop). Select **Programs – Twist 32 – TWIST Phase IV**.

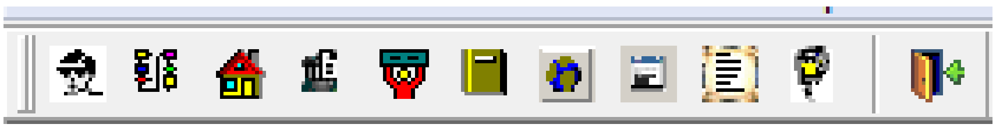
In the User ID field, type in your **assigned user ID**. Your user ID is provided by H-GAC.

When logging into TWIST for the first time, type in the default password, "**onestop**." Use this default password if your password is ever reset. The password is good for 60 days. Your new password must be at least six characters and contain at least one letter and one number. Passwords are case sensitive.

Make sure the Region field is set at "Production."

When you click the OK button, you are agreeing to treat the information in TWIST as confidential.

Navigating in TWIST

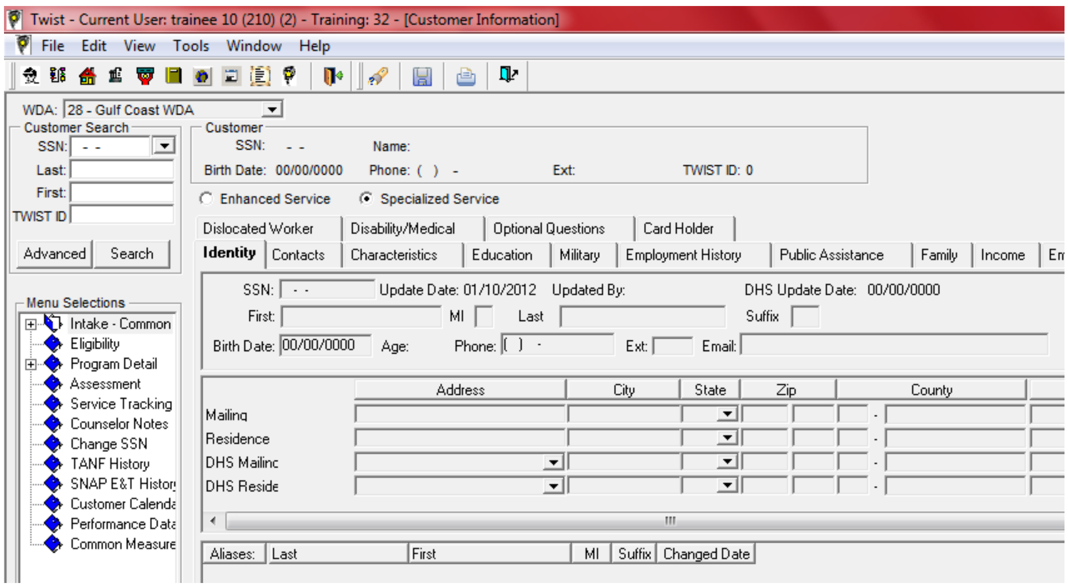


You use icons to navigate in TWIST and access all the menus and tabs.

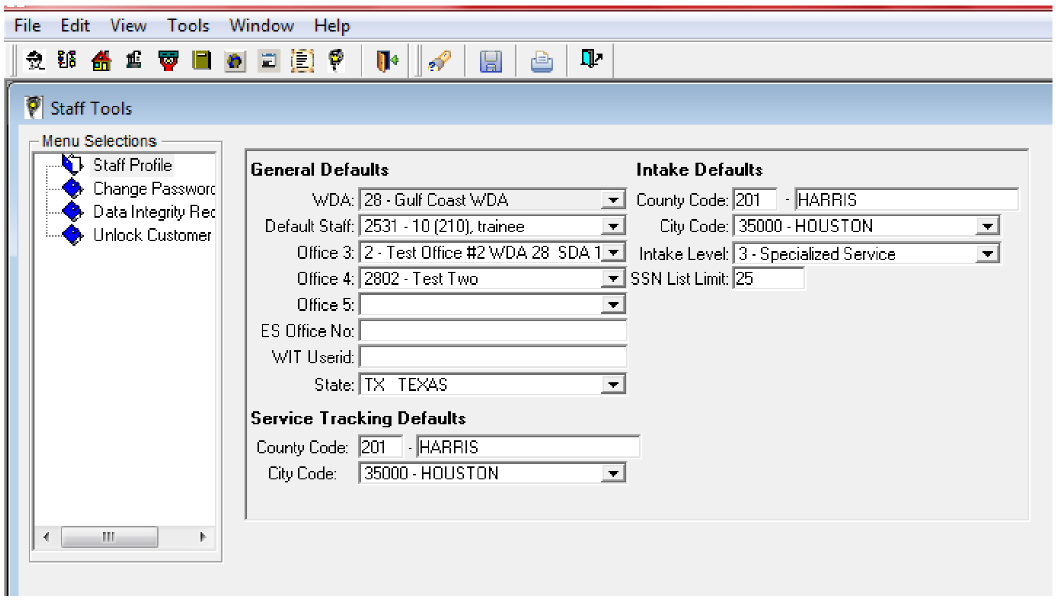
- Exit
- TWIST Web (search)
- Workforce Center Customer Tracking
- TWIST Web Reports
- WorkInTexas.com
- Staff Tools
- Reference Tables
- WDA Administration
- Group Actions
- Customer Information
- Search
- Save
- Print
- Close

Icon Toolbar

The icon launches screens with menus and tabs used to navigate. When you choose one of the icons, you will find a list of menu items at the left side of the screen. Tabs are folders within each menu item.



Icon – Staff Tools



The Staff Tools icon provides four menu items. The menu selections are on the left side of the screen. Set your staff profile before entering data into TWIST.

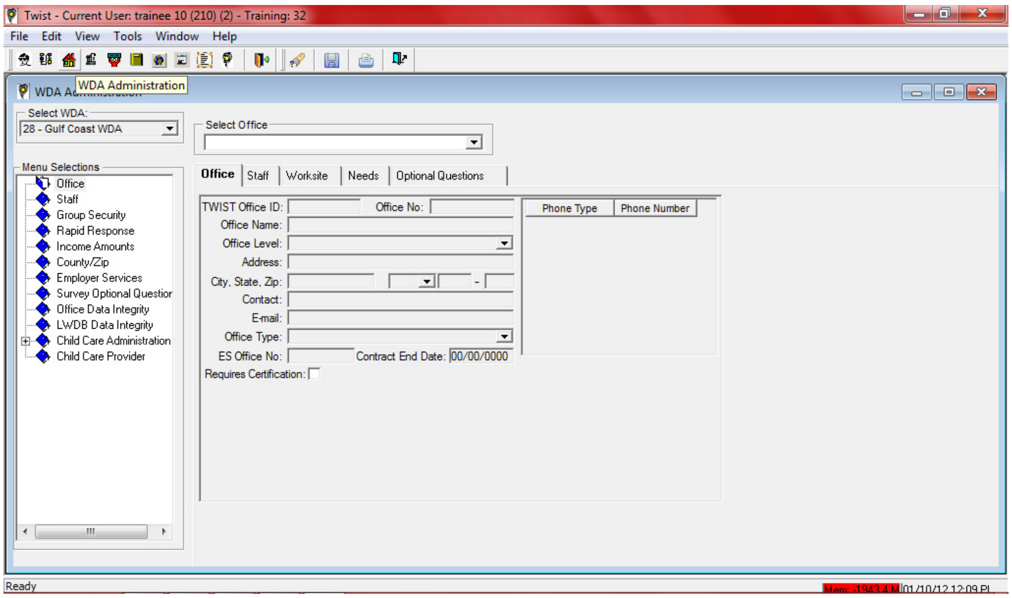
- Establishing a Staff Profile sets the defaults displayed in TWIST, including city, county, state, office type, and staff member information. It also allows you to set defaults for commonly used data. For example, if the majority of your customers reside in the same city and county, this data can be populated automatically into TWIST.

- Data Integrity: The TWIST data integrity process monitors performance-related data updates and/or changes. A notification occurs when data is not entered timely. The notification initiates a process to request approval of the newly entered data. Check here for the status of the approval.

- Change Password is used to change your password. TWIST requires you to change your password every 60 days. Use this feature to change your password if you feel it has been compromised.

- Unlock Customer is used to release the records that are locked. Only one person has the capability to change a record at one time. The system will automatically lock a customer's record when more than one user attempts to make changes.

Icon – WDA Administration



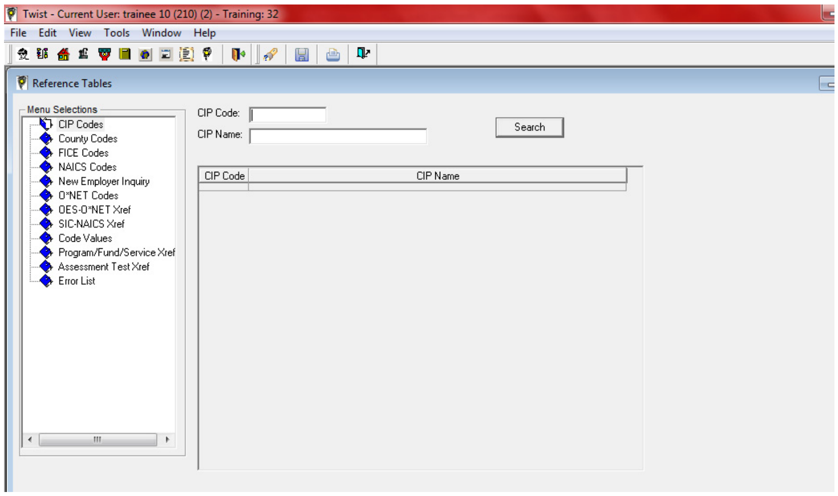
The menu items that you might use under this icon include:

1. Rapid Response (Out-Placement) — includes a list of all of the employers identified as possibly meeting the requirements for Outplacement/Rapid Response in the Gulf Coast region.

2. Income Amounts – provides income guidelines that are used for determining Workforce Investment Act (WIOA) Youth income eligibility ONLY.

3. County\Zip Codes – Zip codes are assigned to offices to eliminate confusion as to which office is to provide services to a customer receiving benefits with a work requirement. This screen shows the zip codes assigned to each office. Note: Although the zip codes are assigned to an office, the customer is not limited to the office her zip code is assigned. She may go to any office she desires.

Icon – Reference Tables

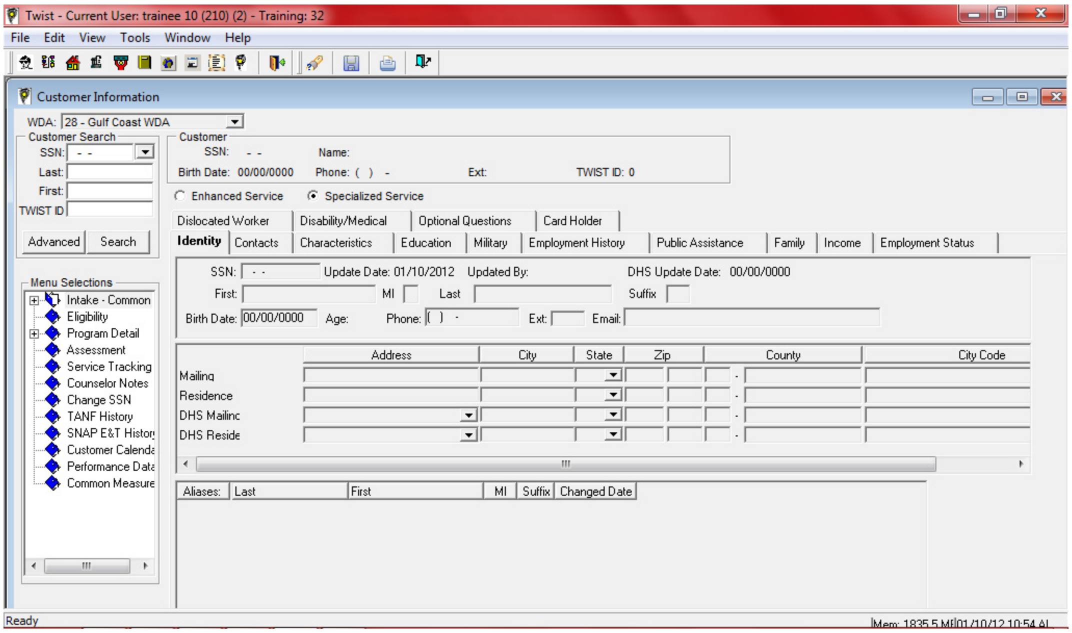


The Reference Tables provide information used for tracking services to customers. The items found here include:

1. CIP Codes - Classification of Instructional Programs
2. County Codes – Three digit code used for county identification
3. FICE Codes - Federal Interagency Commission on Education. It is primarily used by the government to identify educational institutions.
4. NAICS Codes – North American Industry Classification System replaced the U.S. Standard Industrial Classification (SIC) system as the primary method to classify and group businesses by industry.
5. New Employer Inquiry – listing of employers receiving tax identifications the previous month
6. O*Net Codes – The Occupational Informational Network replaced the Dictionary of Occupational Titles (DOT) codes as the primary source of occupational information.
7. OES - O*Net X-ref - Occupational Employment Statistics (OES)
8. SIC – NAIC X-ref – A cross reference of the NAICS that replaced the Standard Industrial Classification (SIC) system
9. Code Values – Descriptions of TWIST listed by types

11. Assessment Test X-ref
12. Educational Functional Level
13. Program/Fund/Service X-ref listing
14. Error List – Listing or error descriptions

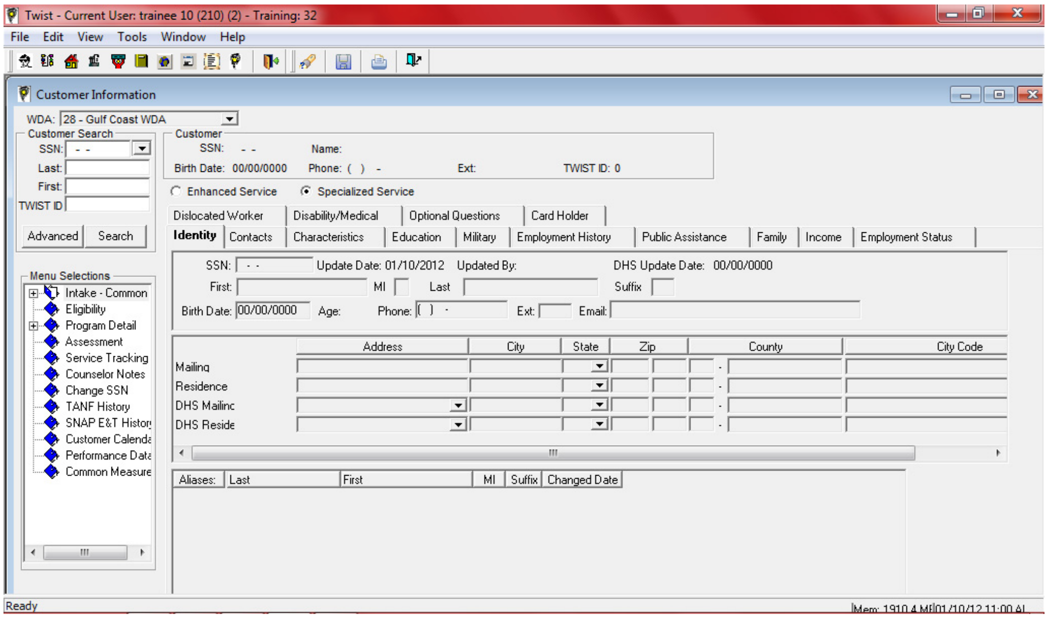
Icon – Customer Information



The Customer Information icon displays the screen where you find and enter almost all information about customers. A menu of options is on the left side of the screen. Clicking on a menu item displays a screen with multiple tabs. Menu options include:

- Intake-Common
- Eligibility
- Program Detail
- Assessment
- Service Tracking
- Counselor Notes
- Change SSN
- TANF History
- SNAP History
- Customer Calendar
- Performance Data
- Common Measures

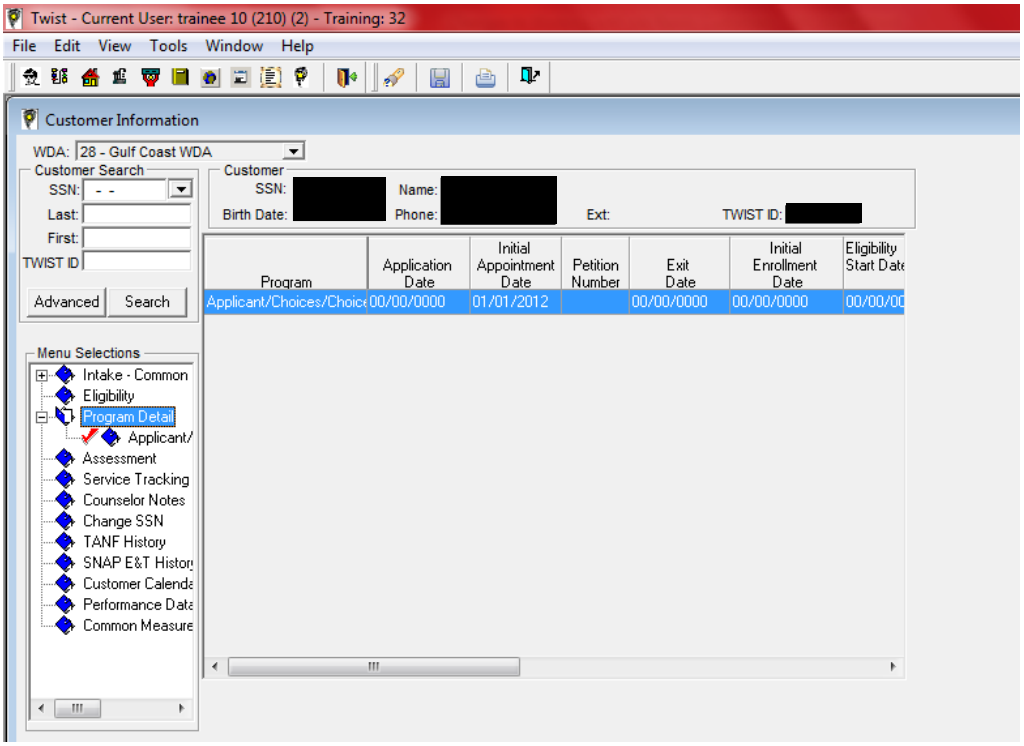
Menu Item – Intake Common



The initial screen shows the Intake-Common menu item where the customer's identifying information is displayed. If Specialized Services is checked, thirteen tabs display on this screen containing demographic information about the customer.

To search for a particular customer, enter a SSN or Last and/or First Name and click on the **Search** button. If you get a match, the customer's demographic information will populate fields in the Identity tab.

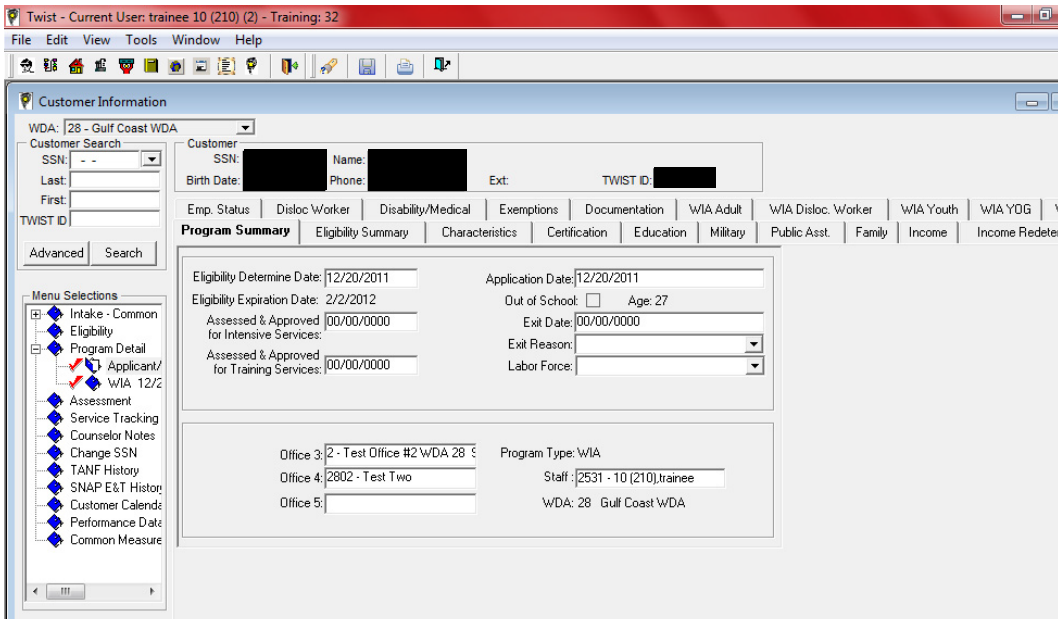
Menu Item – Program Detail



The Program Detail menu item identifies the different funding sources used to fund services for a particular customer. These funding sources include:

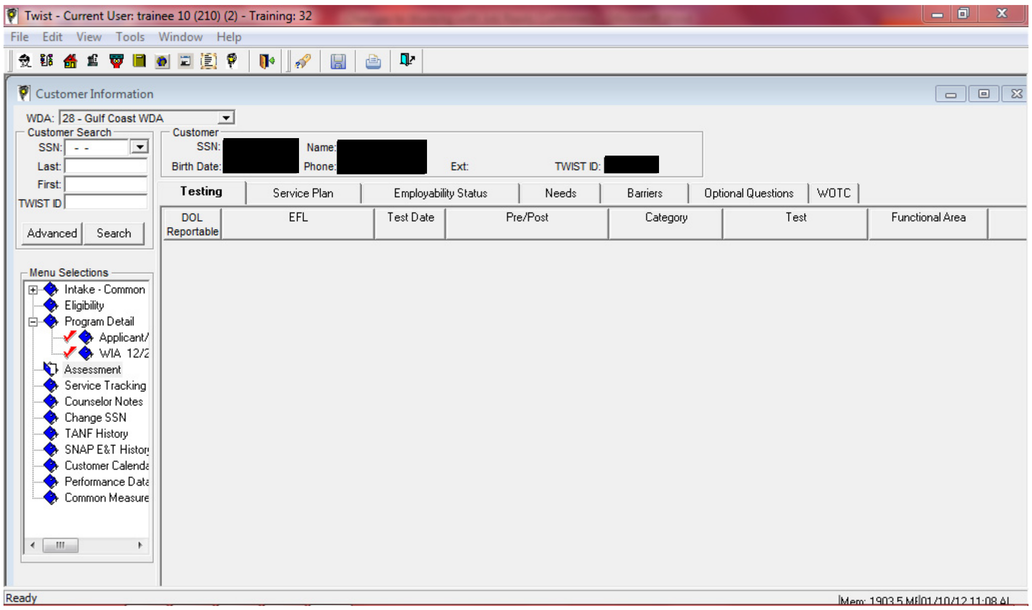
- ES - Employment Services (a record of a customer receiving basic services)
- WIA/WIOA – Workforce Investment and Opportunity Act
- Applicant\Choices\Choices Plus – Individual receiving TANF (Temporary Aid to Needy Families)
- SNAP E&T- Supplemental Nutrition Assistance Program Employment and Training
- TAA – Trade Adjustment Act
- Rapid Response (out-placements from the labor force)

Each program detail contains information about the customer that relates to that funding source.



- A “+” sign in front of the menu item “Program Detail” indicates that program details for one or more funds have been established.
- Click on the “+” to identify which funds have been or are being used to pay for services to a customer.
- A red check mark in front of a specific program detail indicates the customer is currently receiving services in that funding stream.
- The absence of a red check mark indicates services are no longer being provided.

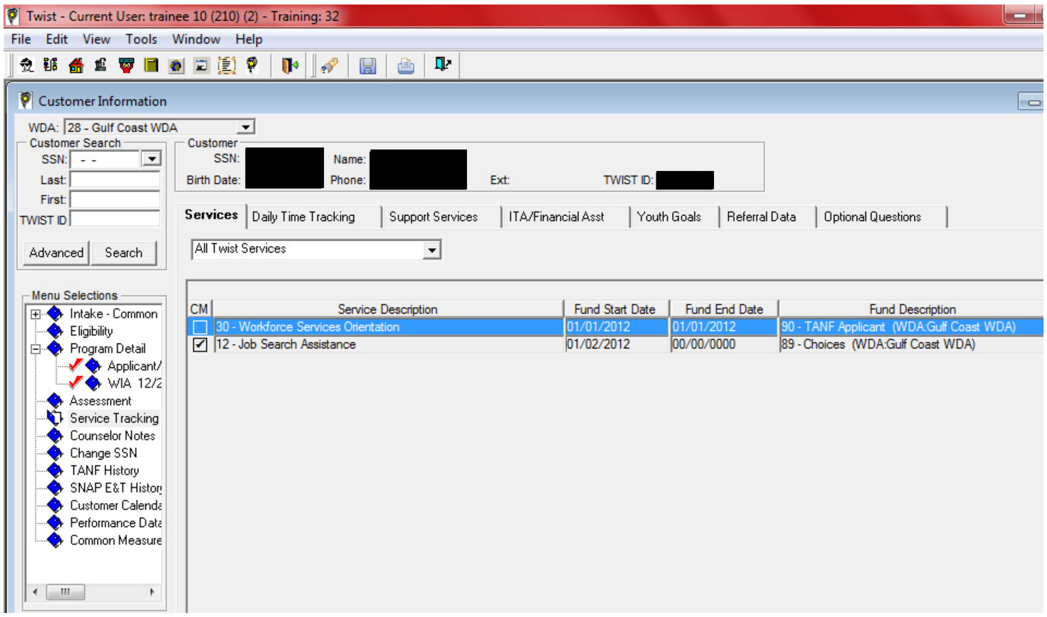
Menu Item – Assessment



The Assessment menu item contains testing and assessment information about the customer. There are seven tabs for entering information on:

1. Testing – Category, description, assessment type, date, test score, grade level, test type and description. Testing and Assessment Specialists use this panel.
2. Service Plan – The Service Plan is completed by PSRs for customers receiving financial aid over $200 in a 12-month period and for customers tagged as WIOA Youth.
3. Employability Status – This tab populates information from TWIST or WorkInTexas.com to show the customer's previous employers and related information. Most of this information may be automatically populated from information in WorkinTexas.com.
4. Needs
5. Barriers
6. Optional Questions
7. WOTC – Work Opportunity Tax Credit

Menu Item – Service Tracking



The Service Tracking menu item contains information about all of the expanded and financial aid services that a customer receives: The tabs include:

1. Service – The Services Detail Panel provides additional information about a particular service. Access this panel by double clicking on any service on the Services tab. To open a new service, right click in the grey area under the Services tab and select Add.

2. Participation

3. Support Services

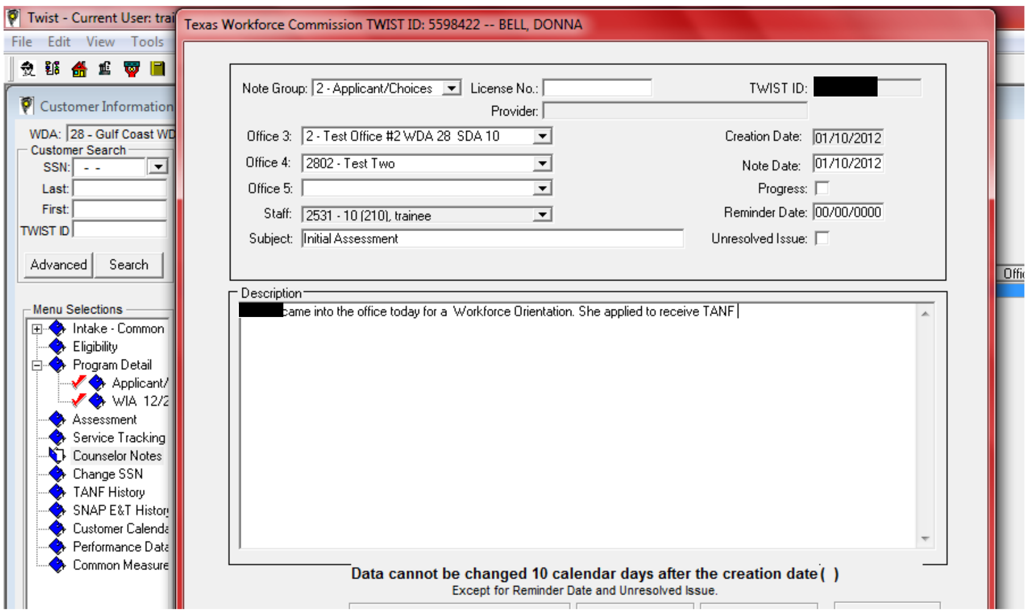
4. ITA/Financial Assistance

5. Youth Goals

6. Referral Data

7. Optional Questions

Menu Item – Counselor Notes

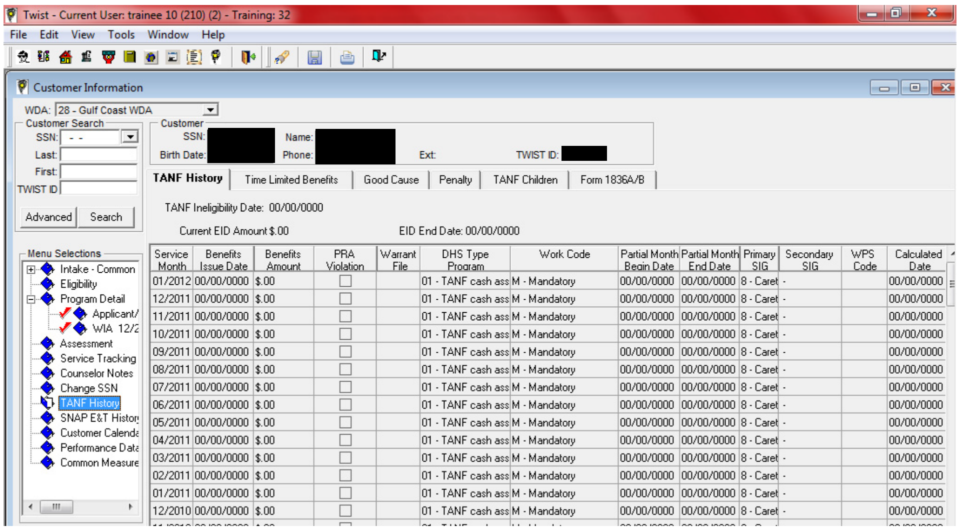


The Counselor Notes menu item provides a space for notes to supplement information about the customer that is already recorded in the Workforce Solutions MIS. Vital information that is not tracked or documented in the MIS can be recorded in this section, e.g., factors which may have an impact on employment efforts, support services terminated, credential achieved, etc.

Under the Freedom of Information Act, a customer can request information recorded in this section. Information in this area should include statements of fact, not opinions. Statements should be clear, concise, and grammatically correct. Avoid offering opinions, judgments, or values based on what you believe. A good rule of thumb is to stick to information that tells how, what, who, where, and when.

All staff can enter Counselor Notes when appropriate. Once a note is saved, it can't be deleted.

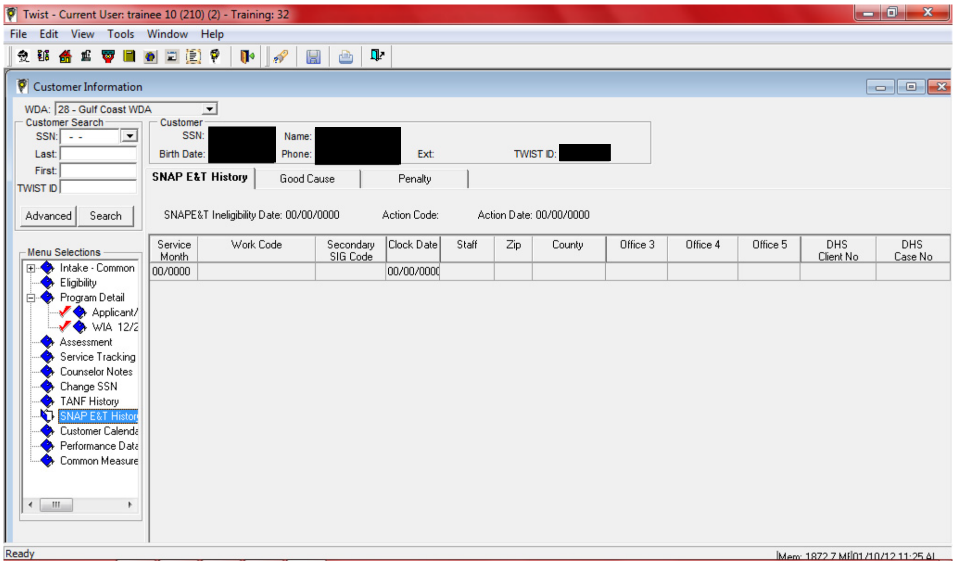
Menu Item – TANF History



The TANF History menu item displays information about the TANF benefits a customer received or is receiving. The tabs on this menu item include:

- Time Limited Benefits — displays the length of time a customer may receive benefits and the time remaining. The length of time is established by the State.
- Good Cause — a waiver, called Good Cause, may be granted to customers not meeting their work requirement for an acceptable reason. Good Cause can only be granted for certain reasons. The Good Cause tab provides an area to track this action. PSRs are responsible for granting Good Cause and entering the action into TWIST.
- Penalty — is used to view and record penalty requests to HHSC to stop benefits. A penalty is requested when a customer does not comply with work requirements and does not have Good Cause for not meeting the work requirements. Trackers are responsible for tracking cooperation hours and requesting penalties.
- TANF Children — displays information about the family member(s) of the TANF recipient on whose behalf benefits are being provided. This information is automatically updated in this component by HHSC.
- Form 1836A/B — indicates when a TANF/Choices customer has an approved "Reduced Work Requirement" (approved to meet requirements to work less than the normal 30 hours per week) due to a temporary disability or caring for someone with a disability.

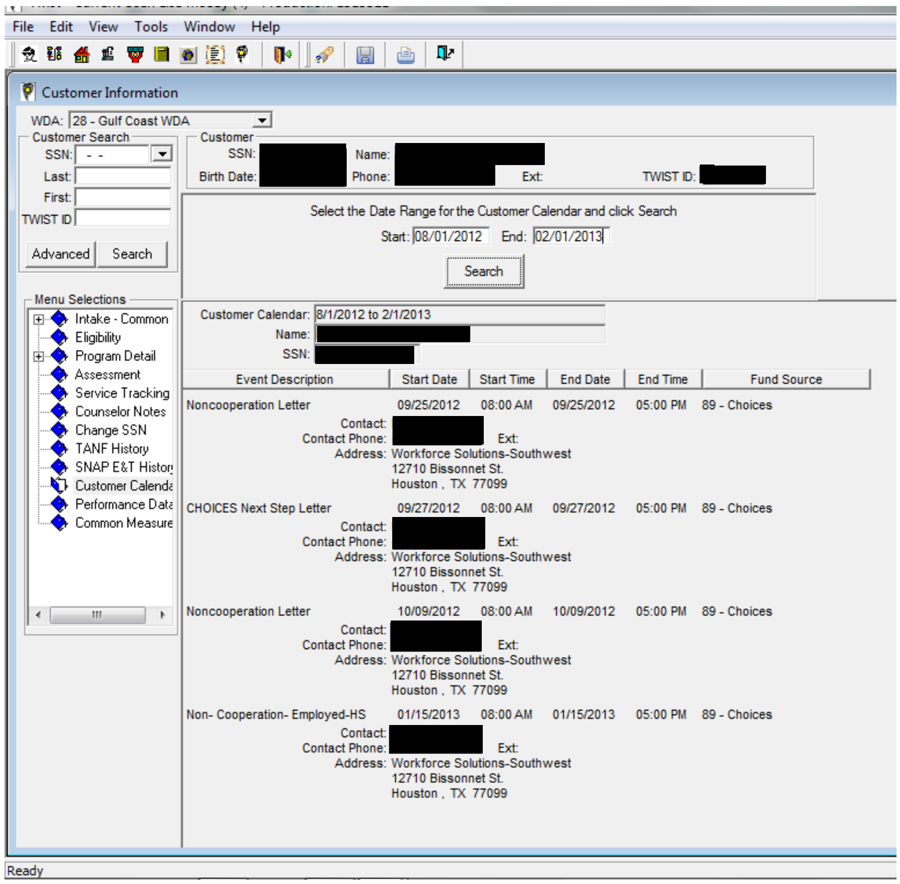
Menu Item – SNAP E&T



The SNAP E&T menu item provides information about customers who receive Supplemental Nutrition Assistance and qualify to receive services paid for with SNAP Employment & Training funds. This screen displays the customer's SNAP E&T benefits.

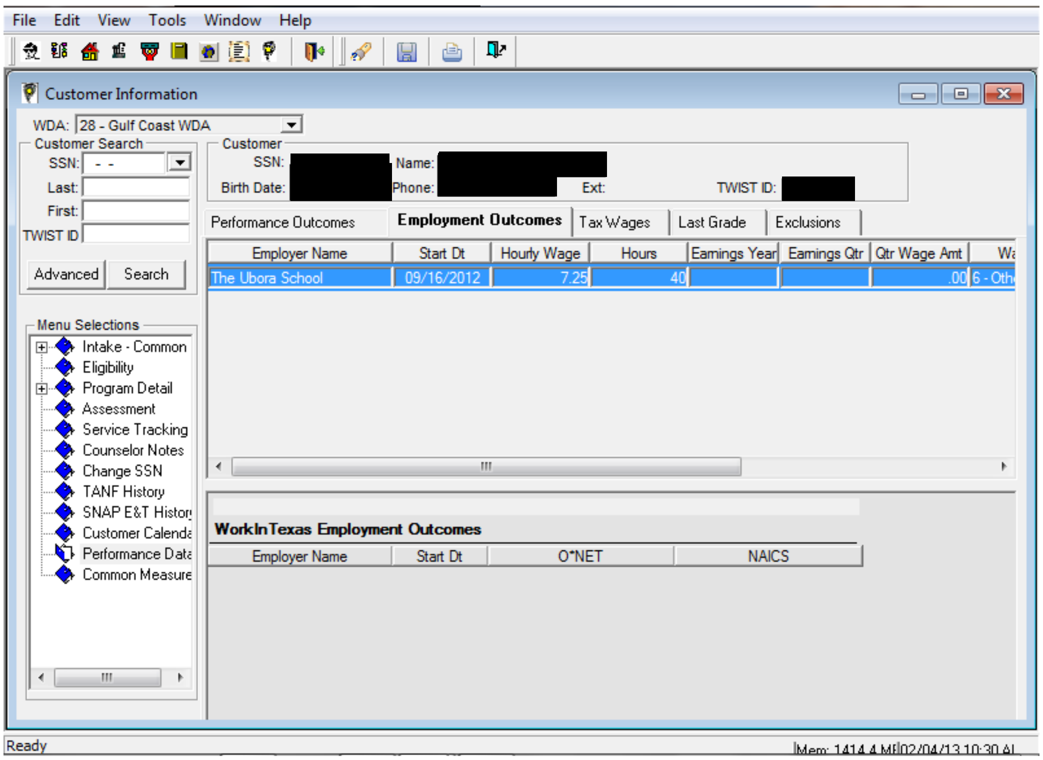
The Good Cause tab and Penalty tabs in SNAP E&T work the same way as Good Cause and Penalty in TANF.

Menu Item - Customer Calendar



The Customer Calendar menu option lists all events the customer has been scheduled for on the Scheduler. Events may include outreach and non-cooperation.

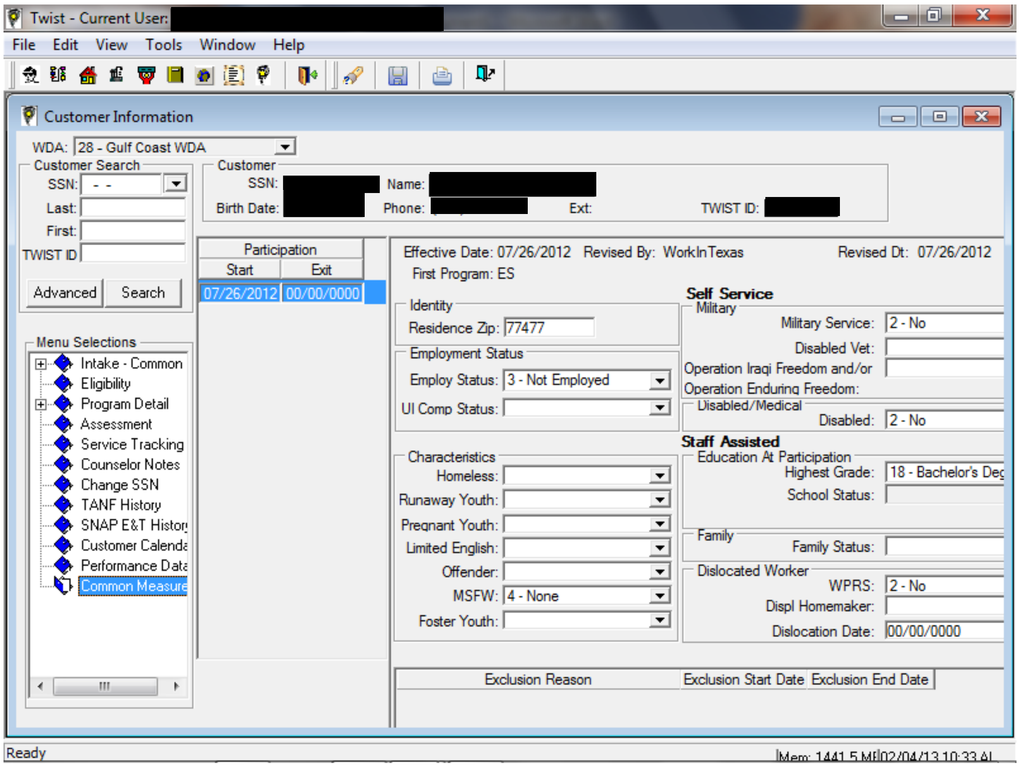
Menu Item – Performance Data



The Performance Outcomes tab displays the outcomes or results of any training or school completions, e.g., certificates of completion, diploma, degrees, etc., achieved by the customer.

The Wage Detail tab displays customer employment wage information reported to the State. Employment data from an employer who does not pay unemployment insurance taxes can be added.

Menu Item – Common Measures



The Common Measures menu item displays the Participation Summary screen. This screen lists all participation periods for the customer and provides access to all participation period characteristics.

The data displayed on this screen is a snapshot of the characteristics entered when the customer received her first qualifying services for the applicable participation period. This information must not be changed unless there is documentation showing that the original information was entered incorrectly. Corrections must be documented in TWIST counselor notes and will be closely monitored.

Program Detail

A customer service record in TWIST is called a Program Detail. A Program Detail is necessary for the purpose of:

- Creating a record for the customer
- Recording services
- Tracking for revenue source requirements
- Reporting performance

Services for customers who are receiving a series of expanded services and who want to continue working closely with Workforce Solutions counselors must be entered into TWIST/Program Detail/Service Tracking. Funding for these expanded services comes from a number of sources. Many funding streams have requirements attached to them that must be met before money can be spent. These requirements usually have to do with a customer's situation such as:

- Is she working?
- Has she been laid off?
- Is she receiving TANF cash assistance and/or Supplemental Nutrition Assistance?
- Are Support Services needed?

When a customer meets one or more of these requirements, we can spend those funds to provide the service(s) she need. There are also cooperation and performance measures associated with funds. TWIST captures these eligibility, cooperation, and performance factors for customers who receive services paid for with the funds. The Program Type must be entered in TWIST to indicate which fund is being used to pay for services. At least one service must be data entered to one of the funds tracked in TWIST (Choices, SNAP E&T, WIOA).

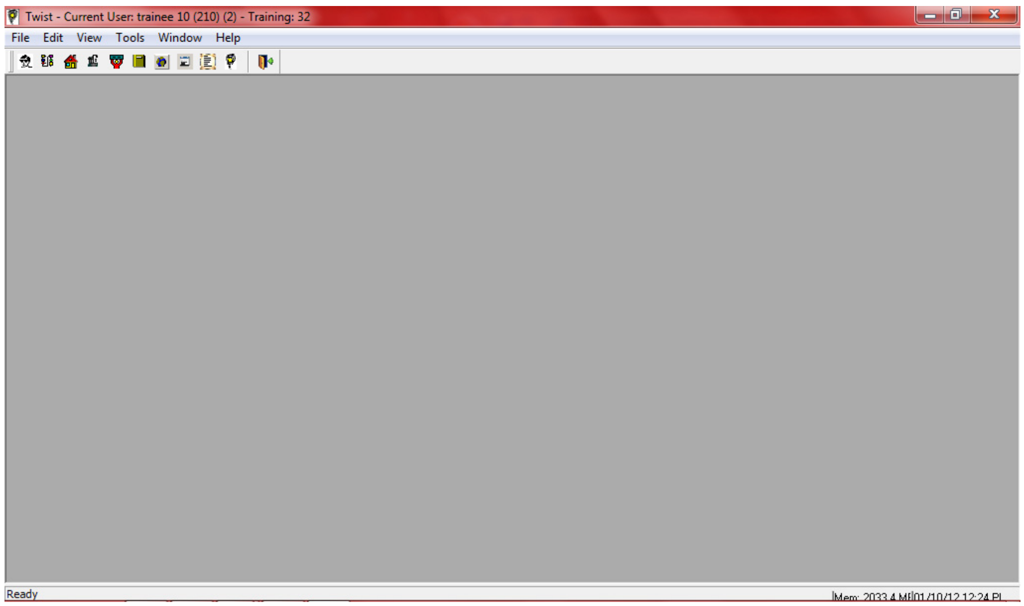
To avoid dual data entry, the first step in creating Program Detail is to perform a customer search in TWIST. This prevents unnecessary duplication of effort by using customer information that already resides in one or more of the MIS components. For example, nearly every customer already has an application in WorkInTexas.com. Using a unique identifier from WIT (WIT ID or SSN) in TWIST pulls the data from that application and automatically populates designated fields used to create the customer record.

Caution: If an open Program Detail for the fund source already exists, indicated by a red check mark next to the program detail type, do not create another Program Detail – go directly to Service Tracking.

Caution: Review all Tabs for complete information.

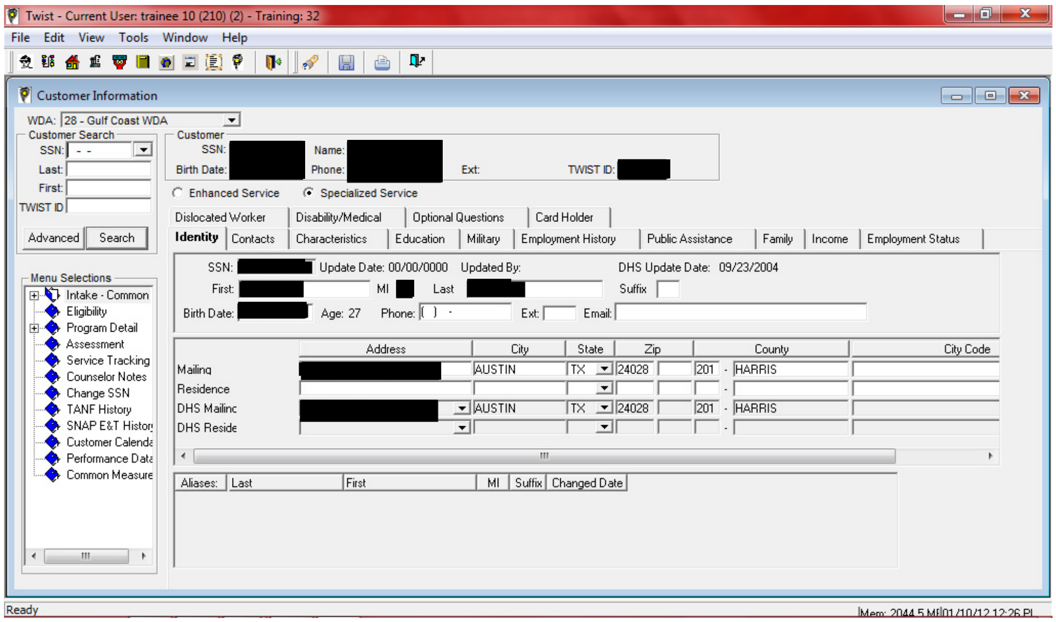
Creating a WIOA Program Detail

You create a WIOA Program Detail for customers receiving expanded services who are not required to participate to keep their benefits. Log onto TWIST. The Main Menu Screen displays.



Version 6-gc BLENDED (24), 6/28/16

Click on the **Customer Information icon** on the top menu bar.



Perform a Customer Search

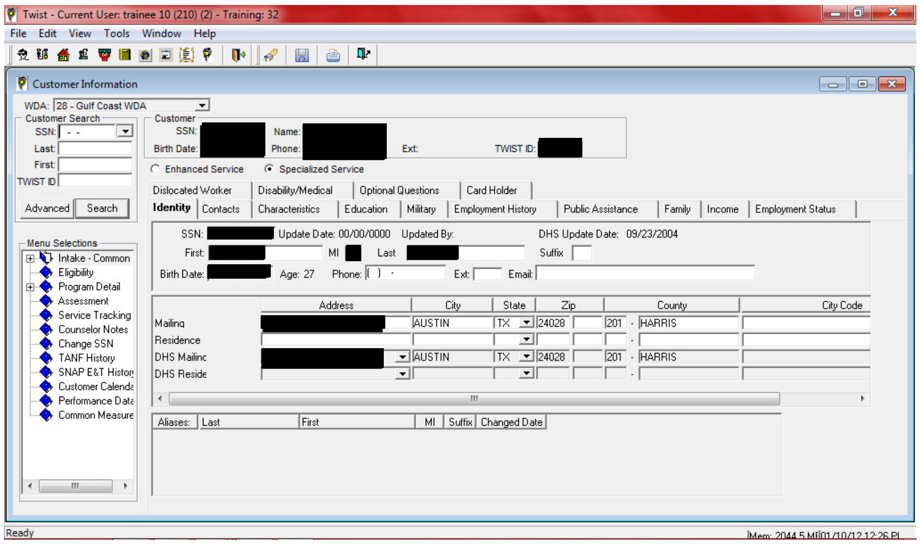
To avoid dual data entry, the first step in creating a customer record is to perform a customer search in TWIST. This prevents unnecessary duplication of effort by using customer information that already resides in one or more of the MIS components. For example, many customers already have an application in WorkInTexas.com. If the Social Security Number (SSN) matches, the data from that application automatically populates designated fields used to create the customer record in TWIST.

You can search for customers using:

- SSN
- Name or partial name
- TWIST ID
- WIT ID
- Health and Human Services (HHSC) Case—or Client number
- Household member's SSN
- Household member's name or partial name

To perform a search in TWIST:

1. Select the **Customer Information icon**. The **Intake Common** screen displays.



2. Choose the method you will use to search for the customer.

   - To search by SSN:
     - Type the customer's SSN, without dashes, in the SSN field, and either press Enter or click the Search button.
   - To search by customer name:
     - Type the customer's last and first name in the Customer Search section, and either press Enter or click the Search button.

Note: You may type a partial name, and the system displays names with that string of letters. The more letters you enter, the narrower your search.

If no records exist in TWIST, the No Results popup screen displays with three options.

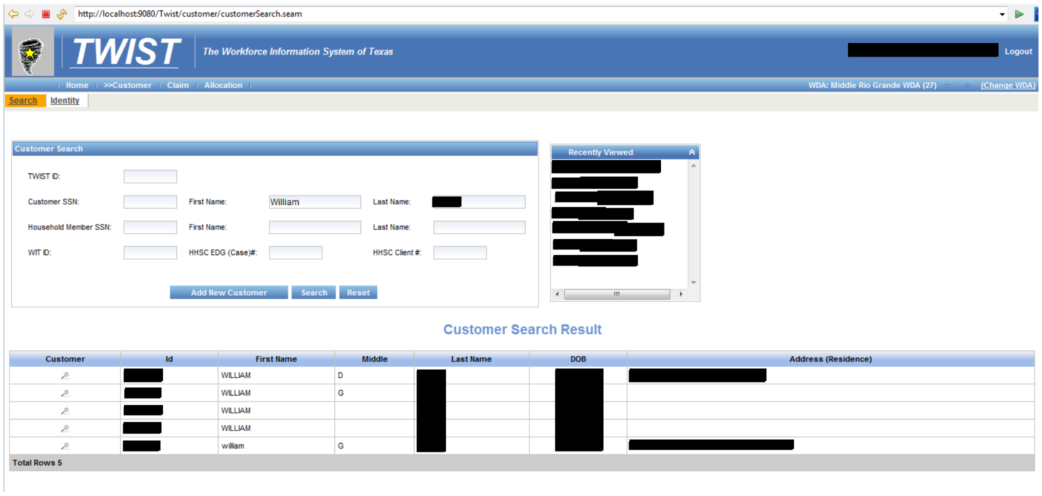
You can choose to:

- Search other Databases (such as TANF, SNAP, or UI), or
- Add as New Customer, or
- Cancel to use the Advance Search.

Note: Before you do any of the above, you might be able to find the customer record in WorkInTexas.com. This will keep you from having to perform duplicate data entry. Log into your WorkInTexas staff account and search for the customer by name or WIT ID. If you find it, write down the WIT ID number – you'll need it for the Advance Search in TWIST.

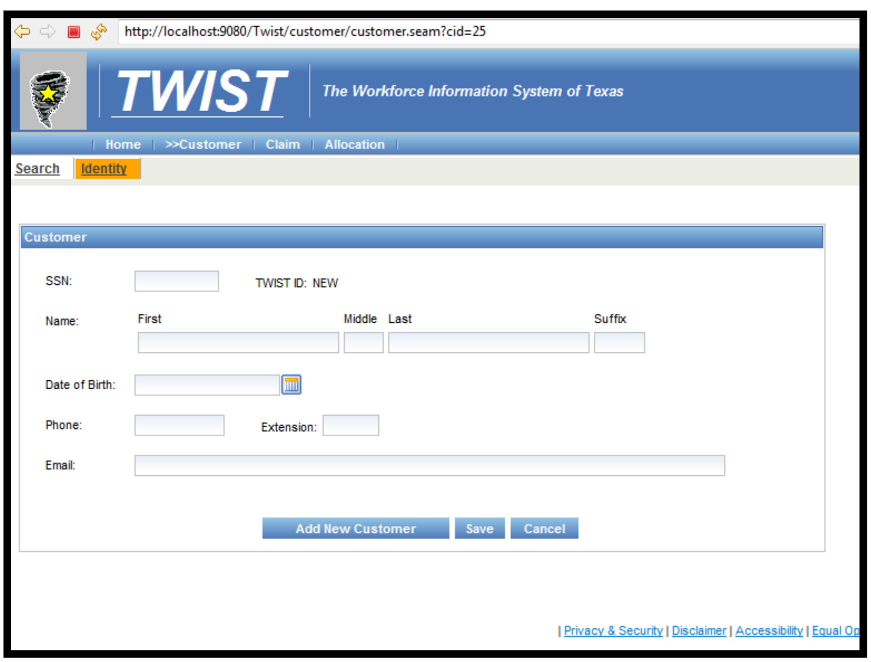
Advanced Search

- To search by TWIST or WIT ID, HHSC EDG or Client number, click on the **Cancel** button. The Customer Information screen redisplays.
- Click on the **Advanced** button to the left of Search. The **Advanced Search** screen displays.



- Input as much information as desired. If you enter a SSN, a TWIST ID, a Household member's SSN, and a WIT ID, the system will return up to 50 records that match any of those criteria.

- Select a customer by clicking on the **magnifying glass** in the **Customer** column. The Customer Detail window displays, and the customer name is placed in the Recently Viewed list allowing you to access the record from the SSN list dropdown on the Customer Information search area.

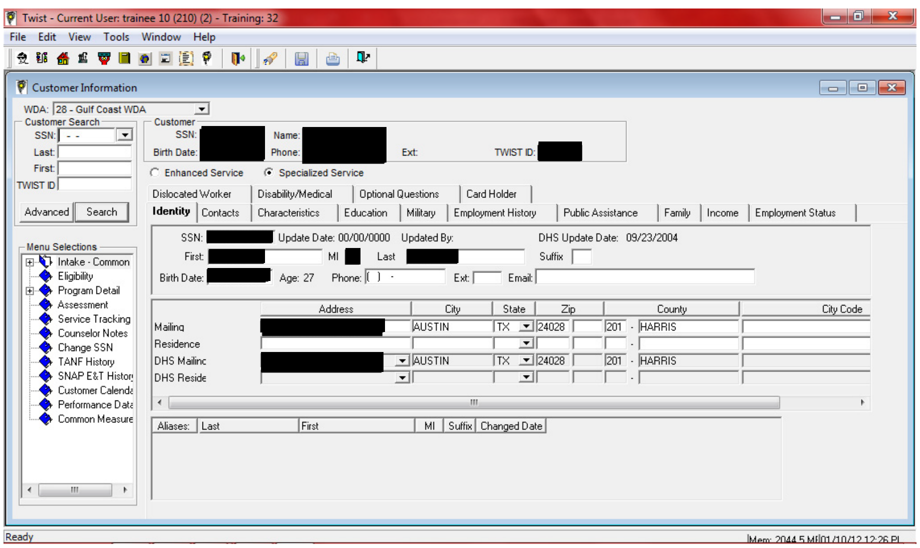


- Return to the **TWIST Customer Information** screen and retrieve your customer from the SSN dropdown list.

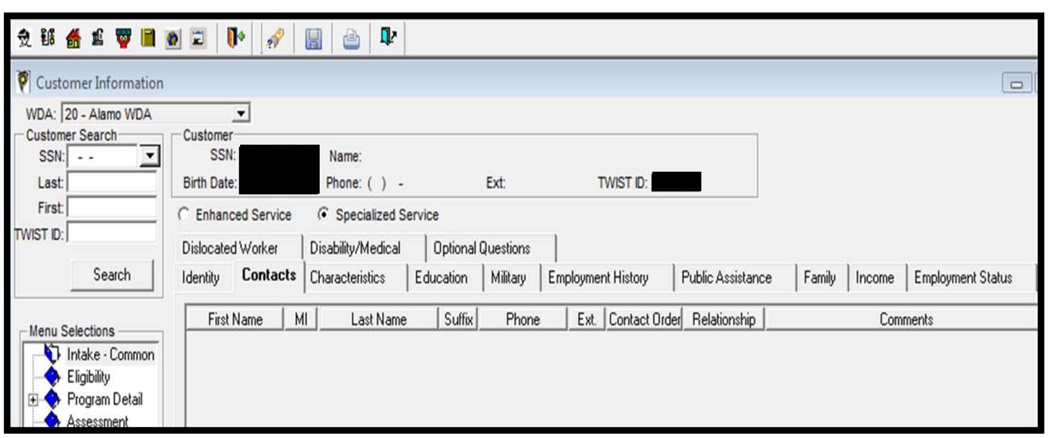
The Intake-Common window displays with the **Identity** tab in front. The Identity tab captures demographic information about the customer. It also provides the customer's contact information.

Verify or update the information as necessary. The customer's name, birth date, phone number, mailing and residence addresses are required fields.

If the customer's residence address is the same as her mailing address type the word "same" in the residence address field and hit the Enter or Tab key on your keyboard. The mailing address will be copied into the residence address fields. Any names the customer has previously used are listed as aliases at the bottom of the screen.



Click on the **Contacts** tab. The Contacts screen displays



Use the **Contacts** tab to record additional people to contact when you cannot reach the customer by phone, mail, or email. Regardless of the number of contacts you list here, you must include the Contact Order. Use the comment field to include other information about the contact, such as where she works and her work phone number.

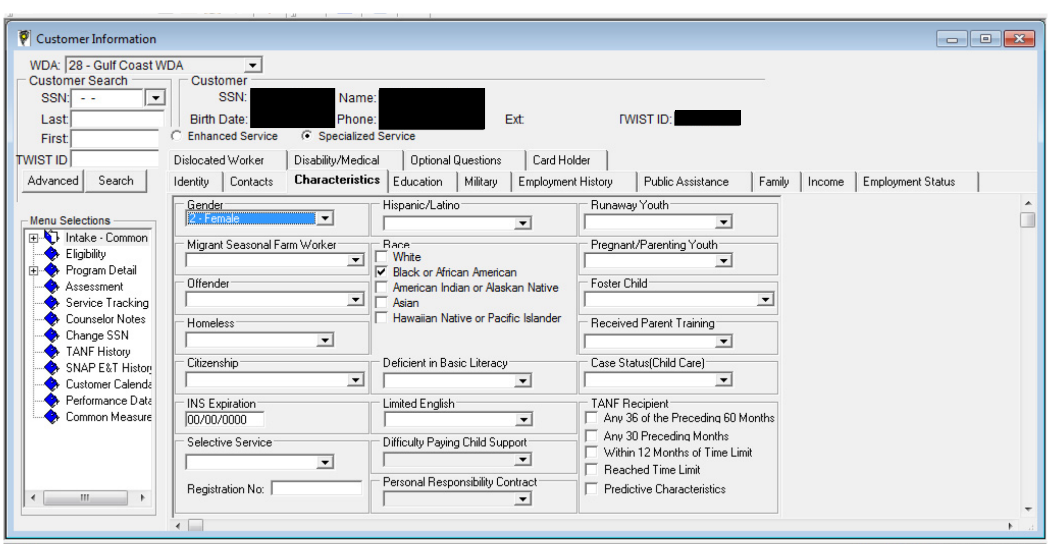
Note: This tab is optional.

Verify or update the information as needed.

Click on the **Characteristics** tab. Make sure the Specialized Services radio button is selected. The TWIST Specialized Service level includes additional customer information and characteristics that must be collected for determining eligibility for a specific fund code such as WIOA. Review the information. Complete and/or update the information if applicable. Be sure the following fields are completed:

- Gender
- Citizenship
- Race
- Selective Service and registration number (see note below)
  - Before using WIOA funds to pay for services provided to a customer, Selective Service registration must be documented for all males born on or after January 1, 1960, and who are 18 years of age or older. Locate the customer's registration number on the internet at www.sss.gov. If you can't find a match, contact the Selective Service System at (847) 688-6888 to request the customer's Selective Service registration number.

Save.



Enter Selective Service eligibility information as follows:

Eligible Males	Selective Service Field	Selective Service Registration No.
Between 14 and 17 years of age	4 – No - Under 18	Not required
Between 18 and 26 years of age	1 – Yes	Required
Over 26 years of age with a valid Selective Service registration	1 – Yes	Required
Over 26 years of age, but born before 1960	5 – No - Born Before 1960	Not required
Over 26 years of age, born after 1960, and without a valid Selective Service registration2	6 – No - Document in File	Not required

1 Male customer has up to 30 days after his 18th birthday to register for Selective Service. After this time, a Selective Service registration number is required to remain eligible for service tracked with WIOA fund code.

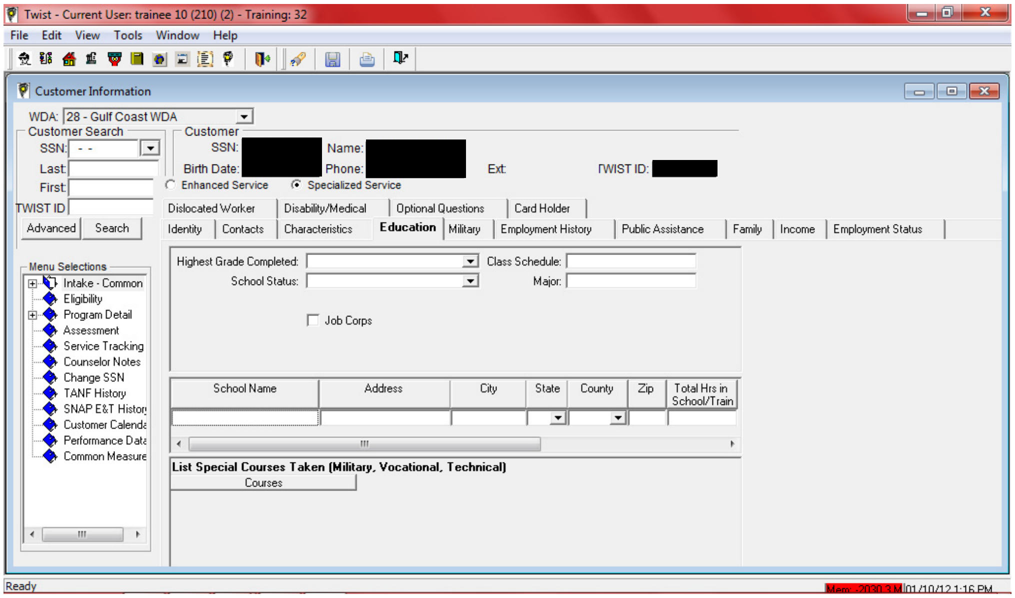
2 Enter a justification in TWIST Counselor Notes explaining why the customer is not in compliance with Selective Service registration requirements. This is required before the customer may receive services.

- Only numbers can be saved in the Registration No: field.
- Selective Service entry is not allowed if the customer is female.
- WIOA funded services cannot be added under Service Tracking unless the status of the Selective Service registration has been properly recorded.
- The Eligibility Determination Date will not be saved in WIOA Program Detail unless the status of the Selective Service registration has been properly recorded.

IMPORTANT NOTE

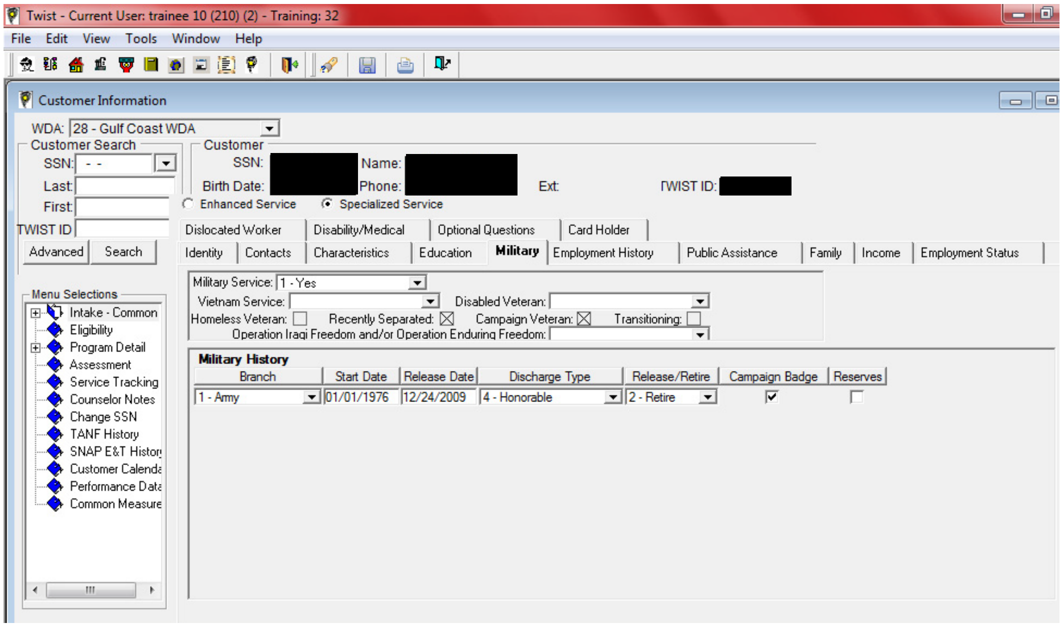
When a male customer who is nearing his 18th birthday has registered for Selective Service, update his Selective Service eligibility information on both the Intake - Common screen and on the WIA/WIOA Program Detail screen.

Click on the **Education** tab.



Review the information. Complete and/or update the information if applicable. Highest grade competed must be selected. School information and hours attended are required if the customer is requesting financial aid for child care to attend school. **Save**.

Click on the **Military** tab.



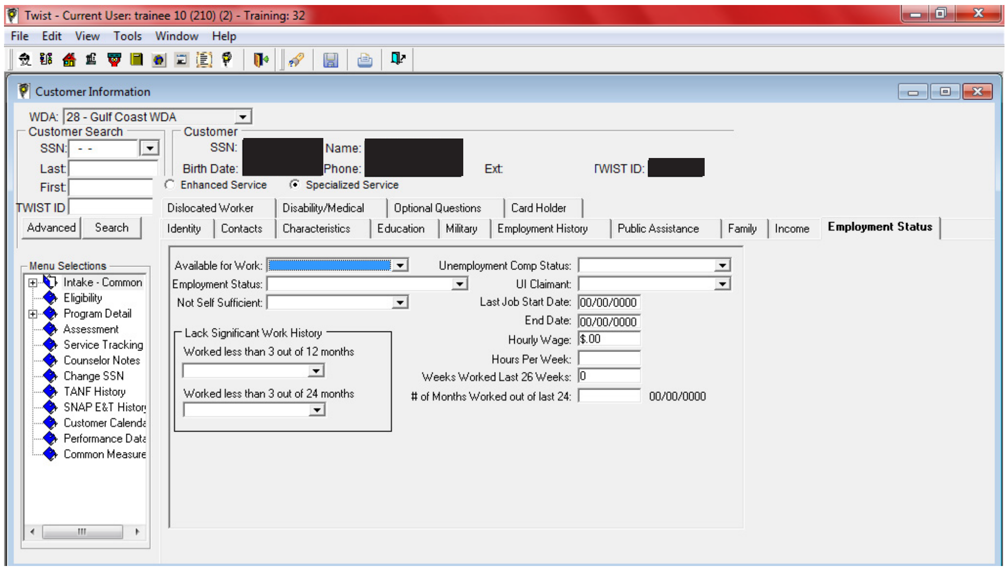
Review the information. Complete and/or update the information if applicable. If you select Yes under Military Service, additional fields display.

Complete the applicable fields including:

- Vietnam Service
- Disabled Veteran
- Homeless Veteran
- Recently Separated
- Campaign Veteran
- Transitioning

If necessary, right click to add additional details under **Military History.**

Click on the **Employment Status** tab.



Review the information. Complete and/or update the information if applicable. Make sure the Available for Work, Employment Status, and # of Months Worked out of last 24 fields are completed. **Save**.

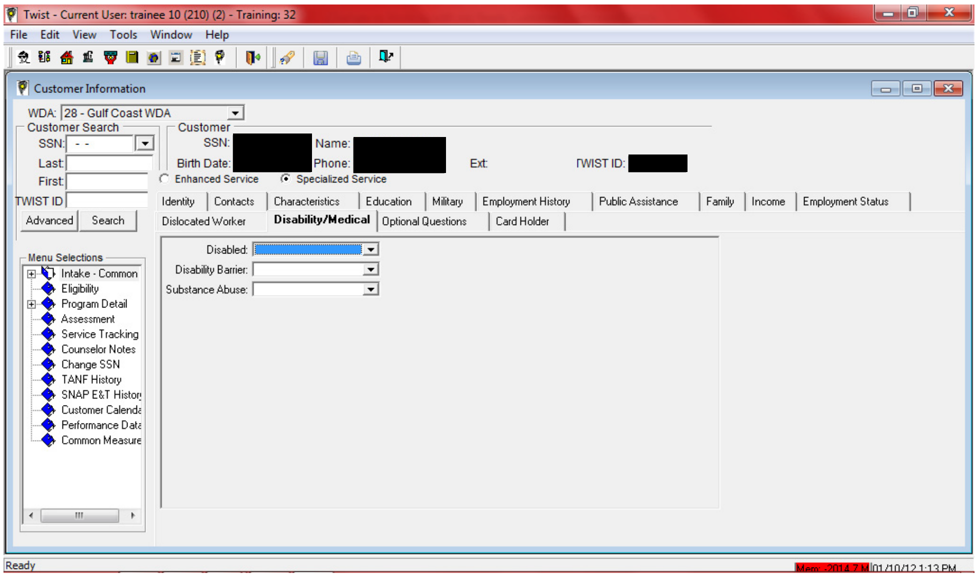
IMPORTANT NOTE:

A customer is employed at date of participation if, in the seven days before application, she:

- Did any work at all as paid employment unless she received a notice of termination of employment, or the employer has issued a WARN or other notice that the facility or enterprise will close, or she is currently on active military duty and has been provided with a date of separation from military service
- Did any work at all in her own business, profession or farm
- Worked 15 hours or more as an unpaid worker in an enterprise operated by a member of the family
- Was not working but has a job or business from which she is temporarily absent because of illness, bad weather, vacation, labor management dispute, or personal reasons, regardless of whether paid by the employer for time off and regardless of whether seeking another job

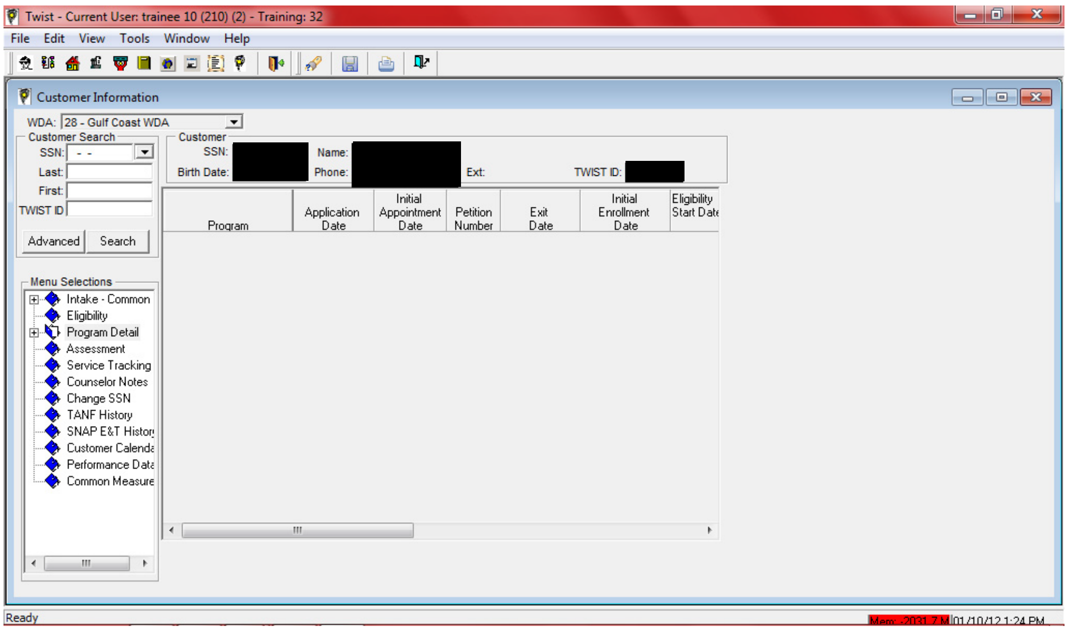
Note: Recently Separated Veteran – is an individual who applies for service within 36 months after discharge or release from active duty in military service **Save**.

Click on the **Disability/Medical** tab.

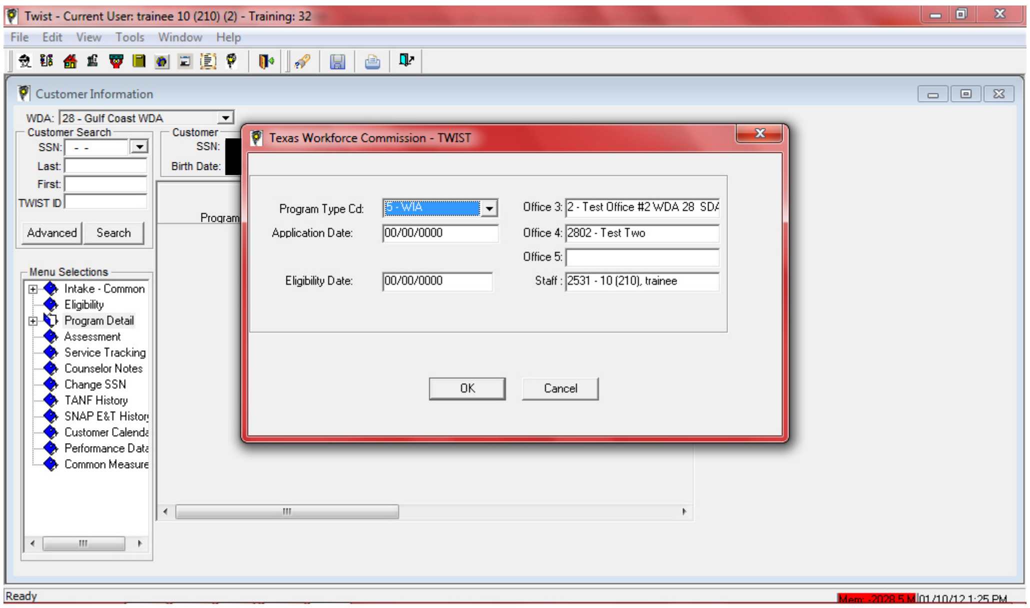


Review the information. Complete and/or update the information if applicable. If Yes is selected from the Disabled dropdown menu, indicate whether the disability is a barrier to work or school in the Disability Barrier dropdown. Indicate whether the Disability Barrier is related to substance abuse in the Substance Abuse dropdown. **Save**.

Click the Program Detail option on the left menu. The Program Detail screen displays.



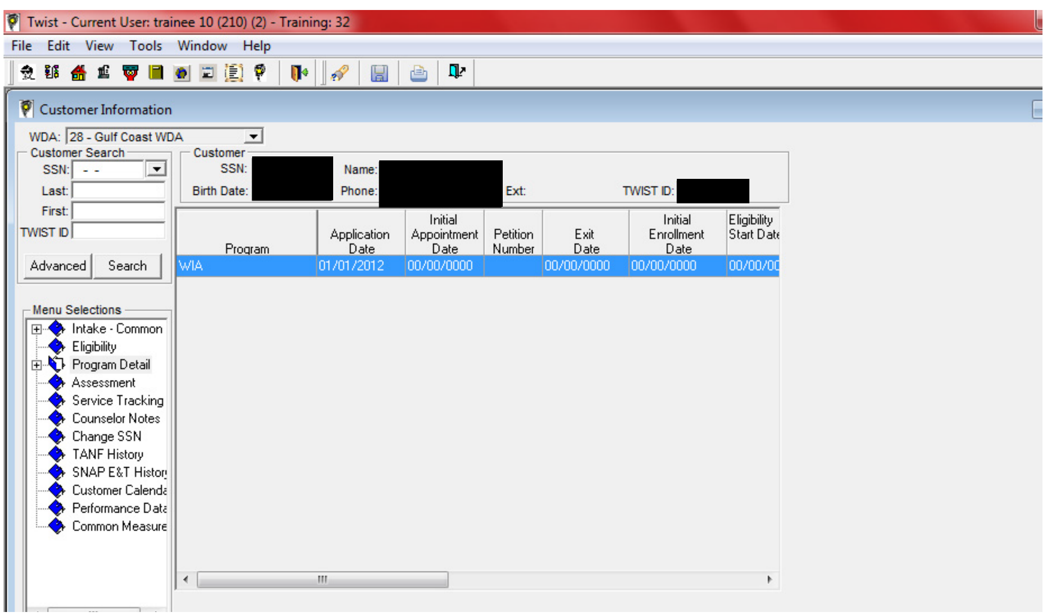
Right click in the **grey area and select Add**. The Program Type pop-up window displays.



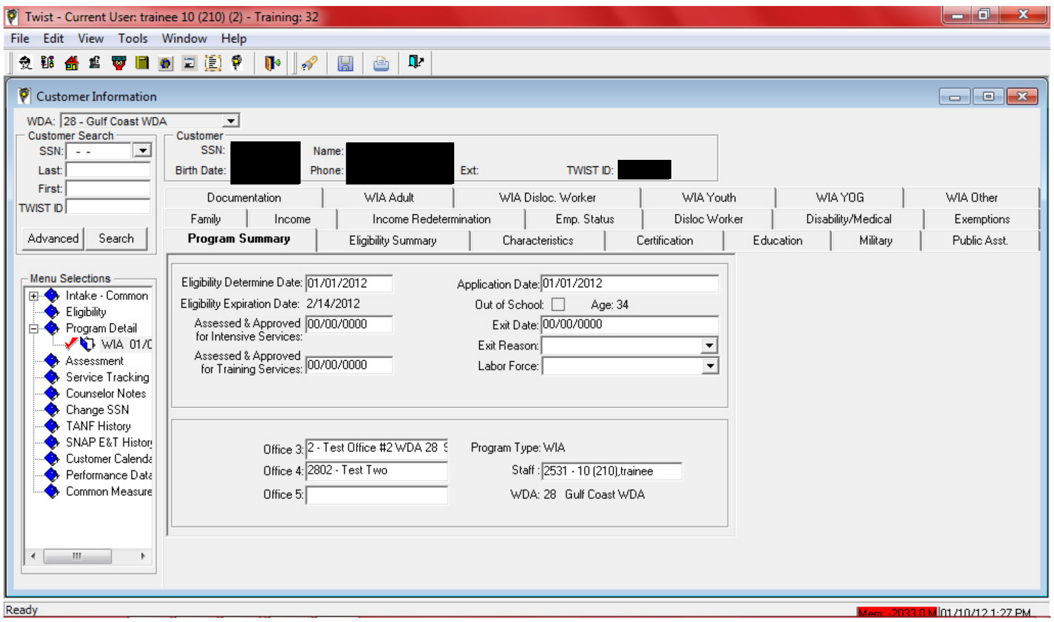
Complete the information in the pop-up window according to the funding sources used to pay for services delivered to the customer. For example:

Program Type:	WIOA
Application Date:	Date customer agreed to a series of continuing basic and expanded services
Eligibility Date:	Same
Enter Office 3, 4 & Staff:	This information will default if your staff profile is updated.

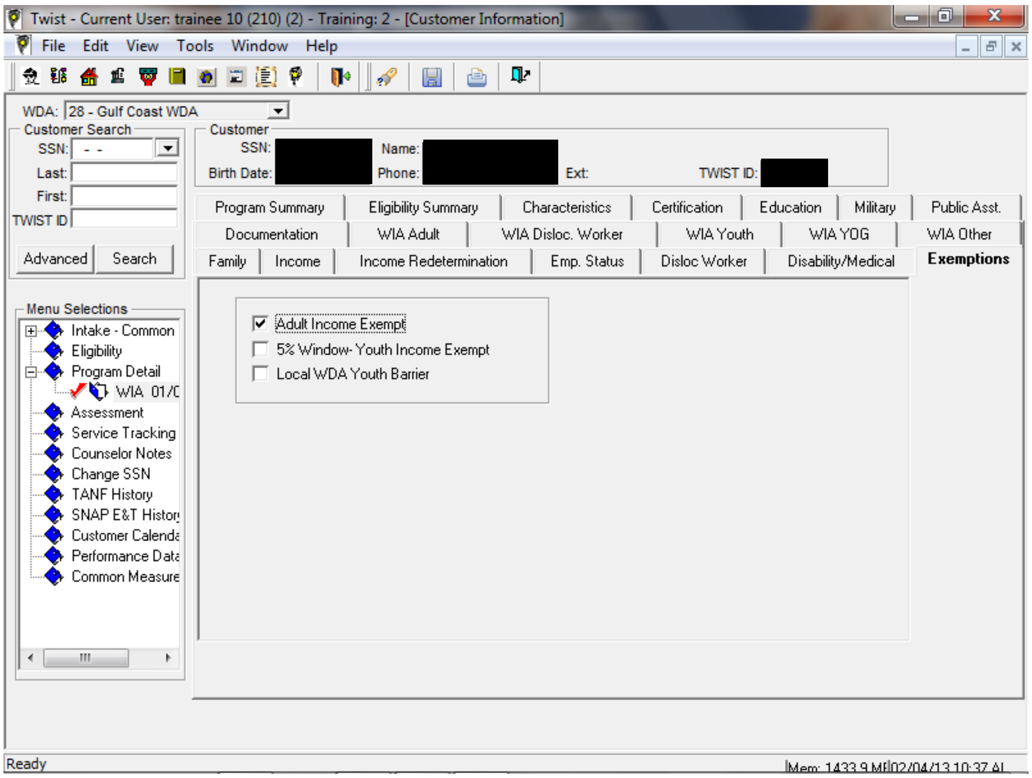
Click **OK**. The Program Detail displays with the new WIOA record. **Save**.



Click the "+" to the left of the Program Detail menu option. Click the WIA/ **WIOA Program Detail** with the red checkmark. The Program Summary screen displays.

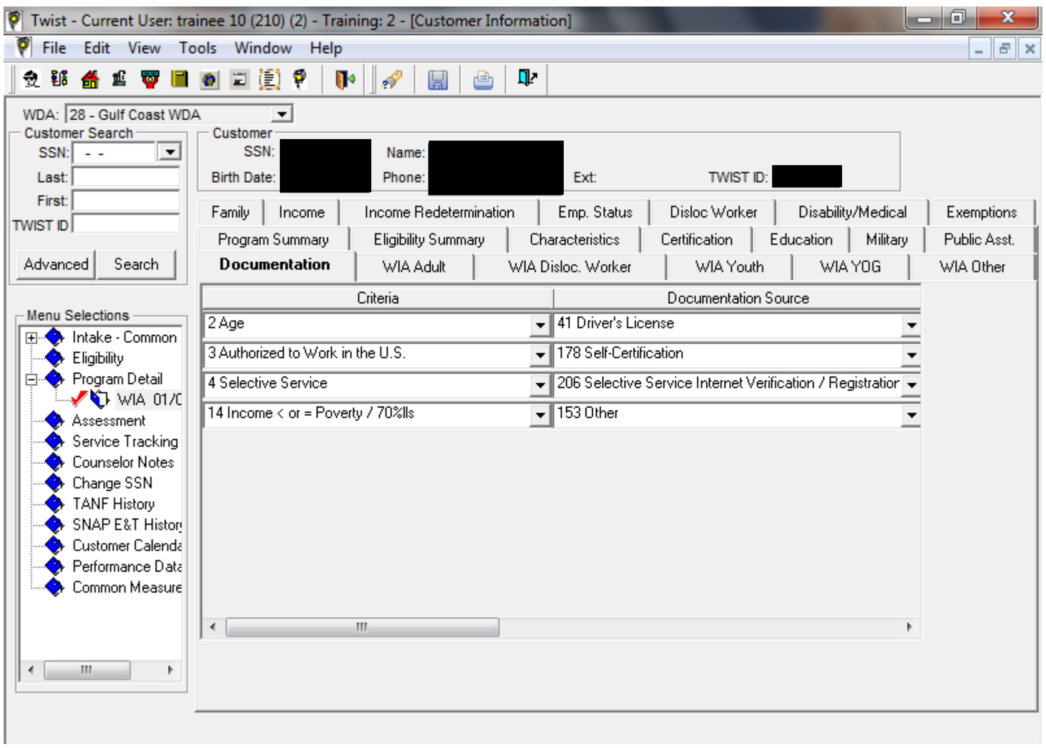


Enter the "**Assessed and Approved for Intensive Service**" date and **Save**. Click on the **Exemptions** tab. The Exemptions screen displays.



Click on **Adult Income Exempt** and **Save**.

Click on the Documentation Tab to enter the eligibility criteria for one or more funds as applicable. Select the appropriate documentation source used to document each eligibility criteria. Right click in the grey area to Add. The Documentation Criteria and Documentation Source screen displays.



Complete the following dropdowns as indicated. Use whatever the customer provides as the Documentation Source.

Criteria	Documentation Source
2 -Age	41-Driver's License
3 -Authorization to Work in the U.S.	178-Self Certification
4 -Selective Service (male born after 1/1/1960) Registration	206-Selective Service Internet Verification/
14 -Income < or = Poverty 170% require income test for expanded service)	153-Other (Board doesn't

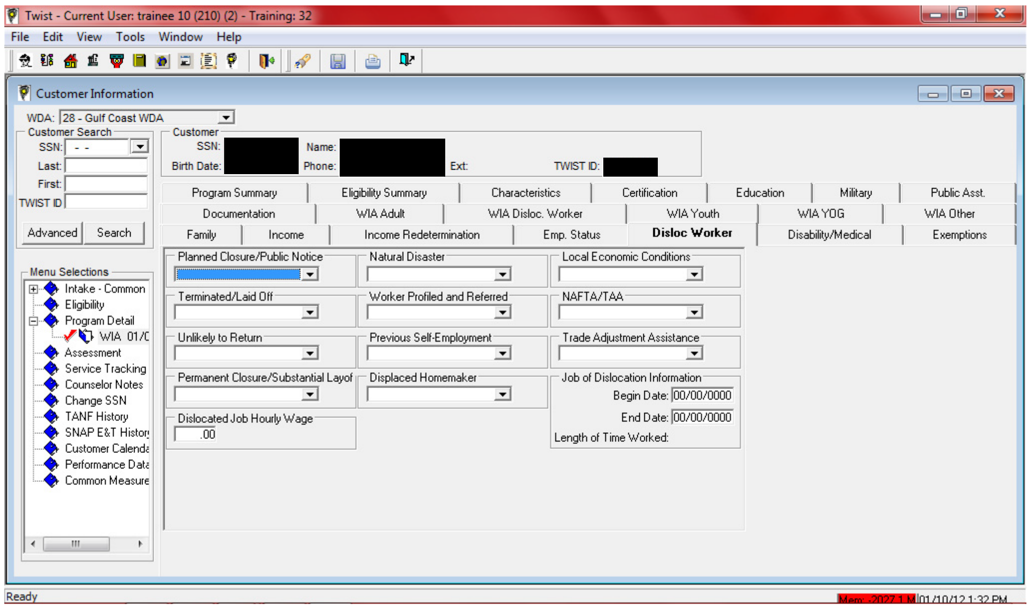
Using Dislocated Worker Funds

If you have decided to tag the customer as WIOA-Dislocated Worker ensure the Workshop Application Addendum has been completed properly and documentation is attached.

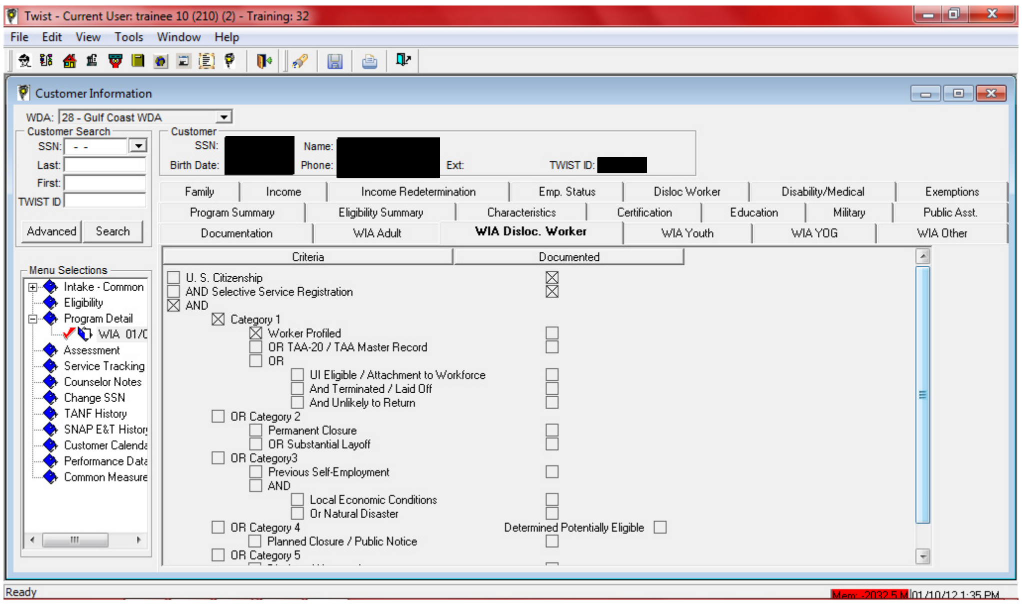
On the Employment Status Tab in TWIST, ensure the following fields are completed:

- Unemployment Comp Status
- UI Claimant
- Last Job Start/End Date
- Hourly Wage
- Hours Per Week

On the WIOA Program Detail screen, click on the **Dislocated Worker** tab. Using the information from the addendum, complete the applicable fields.



Click on the WIOA Dislocated Worker tab to verify eligibility. See example below.



The customer is only required to meet the eligibility criteria for one of the five eligibility categories to pay for services with Dislocated Worker funds.

Click on the Documentation tab. Make sure the following standard eligibility criteria and accompanying documentation source are entered:

Criteria	**Documentation Source**
2 -Age	41-Driver's License
3 -Authorization to Work in the U.S.	178-Self Certification
4 -Selective Service (male born after 1/1/1960)	206-Selective Service Internet Verification/Registration

Next, enter the eligibility criteria and accompanying documentation source used to determine eligibility for Dislocated Worker funds. The criteria and accompanying documentation source you enter here depends on the answers and data entered on the Dislocated Worker tab.

For example, if the customer answered yes to "Permanent Closure/ Substantial Layoff"; then the criteria and accompanying source would be:

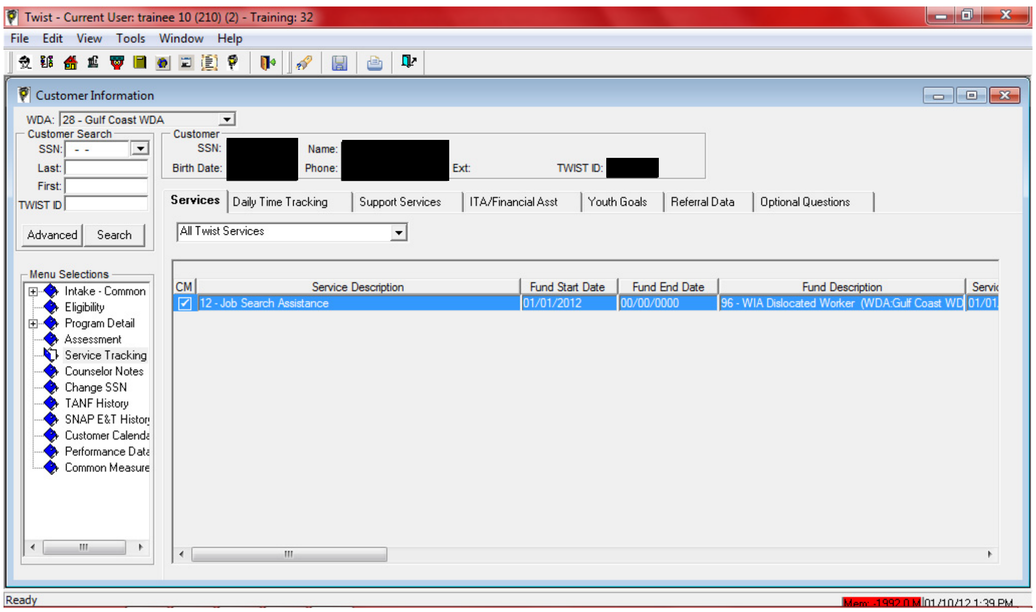
198 – Notice of Layoff

139 – TWC Verification (or whatever the applicable documentation source is)

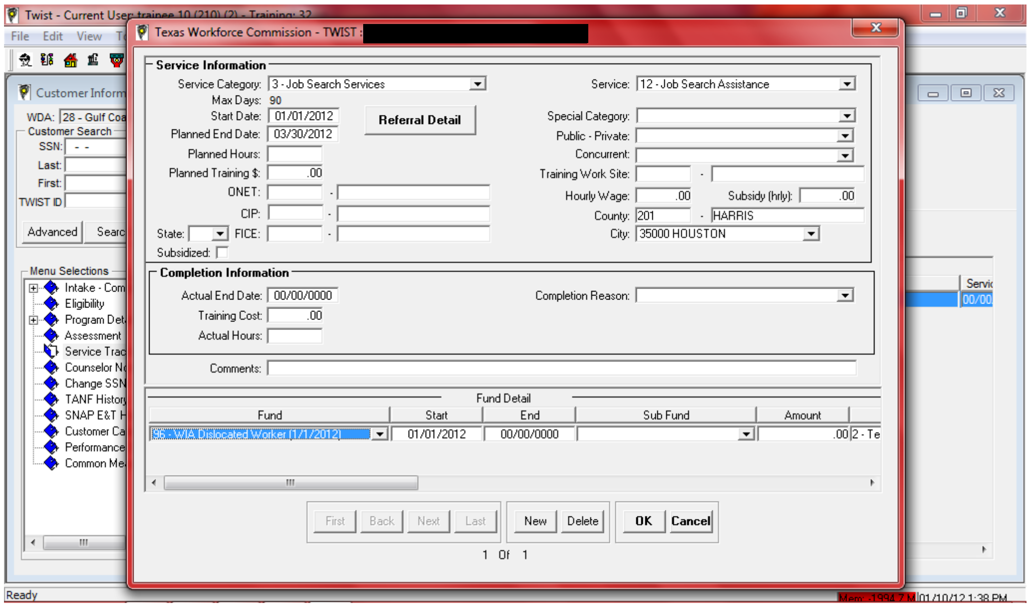
A list of appropriate documentation for all five categories is in the Appendix.

Adding Services

~~The customer's record is not complete until the services she is receiving are entered.~~ To add a service, click on **Service Tracking** from the left menu. The Services Tab displays.



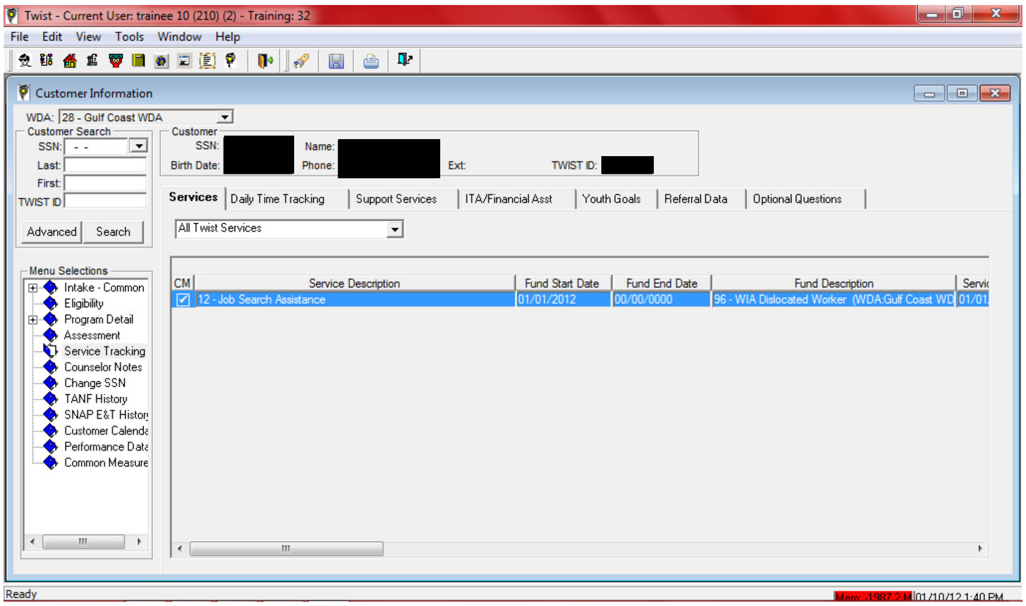
Right click in the **grey area and select Add**. The service information pop-up window displays.



Select the appropriate service category, for example 2-Assessment & Planning from the Service Category dropdown menu. Select the appropriate service, for example 62-Initial Assessment from the Service dropdown menu. Enter the Start Date and press Tab. The Planned End Date will default to the maximum length of service. Enter the County Code and City.

Go to the **grey area under Fund Detail** and right click to **Add**.

Select **Fund 95-WIOA Adult** (or whatever fund, such as TANF, is paying for that particular service). Enter **start date**. Click **OK** and **Save**. The Services Tab displays with the added service listed.



Requirement to Enter a New Service

Customers who are required to receive services to maintain their benefits may be offered another service such as Workfare or Community Services if they have been unable to find work after a certain number of weeks of job search. These customers will be notified and referred to a Personal Services Representative if that occurs.

Immediate Short Term Supportive Services

Sometimes only a minor barrier, such as gas money to get to work, stands between your customer and employment. You may authorize short-term support up to $200.00 one-time only to ensure such minor obstacles do not get in the way of helping your customer find and keep a job. Expenses must be necessary and reasonable for continued participation in services being provided by Workforce Solutions and not otherwise available through other resources. Examples include:

- Transportation and transportation-related expenses, such as bus tokens, or gas money to get to an interview. Customers required to participate with Workforce Solutions qualify for substantial support and may receive additional assistance to look for work.
- Work-related expenses such as hard hat, tools, uniforms, interview clothing
- Vocational exams such as GED

Refer to the Appendix for more details on short-term support services.

To provide immediate short-term financial aid for a customer, follow the guidelines below:

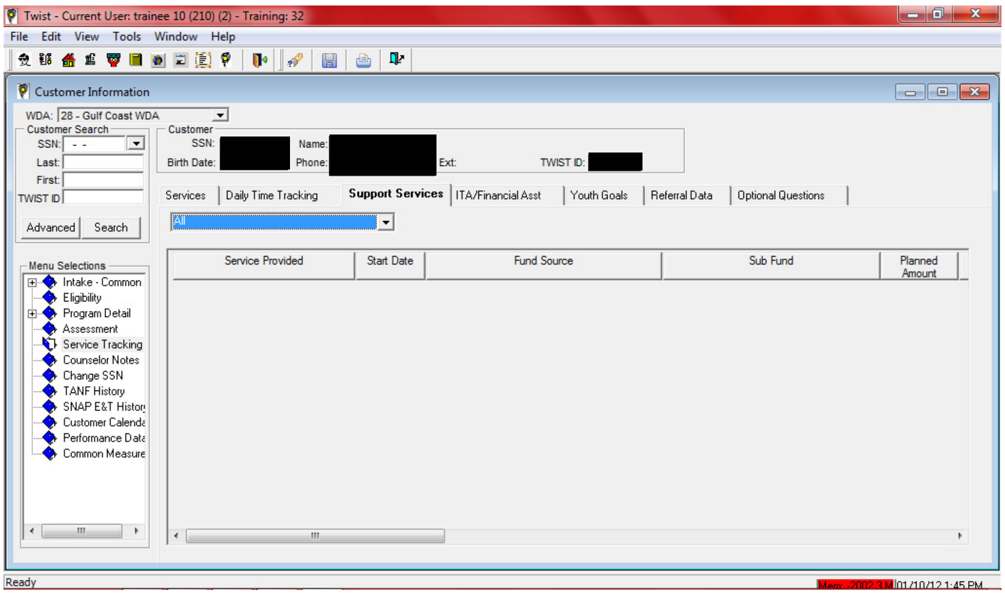
- The customer must complete a Work Application Addendum and provide I-9 documentation , or otherwise qualify for Workforce Solutions financial aid.
- If the customer is looking for a job, she must have an active work application in WorkInTexas.com.

- You must also enter TWIST counselor notes on the day you approve the aid under $200. The note should state (1) what kind of aid you approved, (2) how much, and (3) the purpose of the aid.
- It is not necessary to complete a Job Search Map for customers who receive only one gas card or bus pass unless the map is already required for the customer (i.e., TANF/Choices, SNAP E&T).
- Check TWIST Support Service tab to make sure that the customer hasn't already received a one-time short term service.
- Create a TWIST record for the fund stream that will pay for the short-term financial aid.
- Ensure the customer has a current service in TWIST
- Enter the support service under the Support Service tab in TWIST
- Enter the commitment of financial aid into the Financial Aid Management System (FAMS) no later than the end of the day the aid is approved.

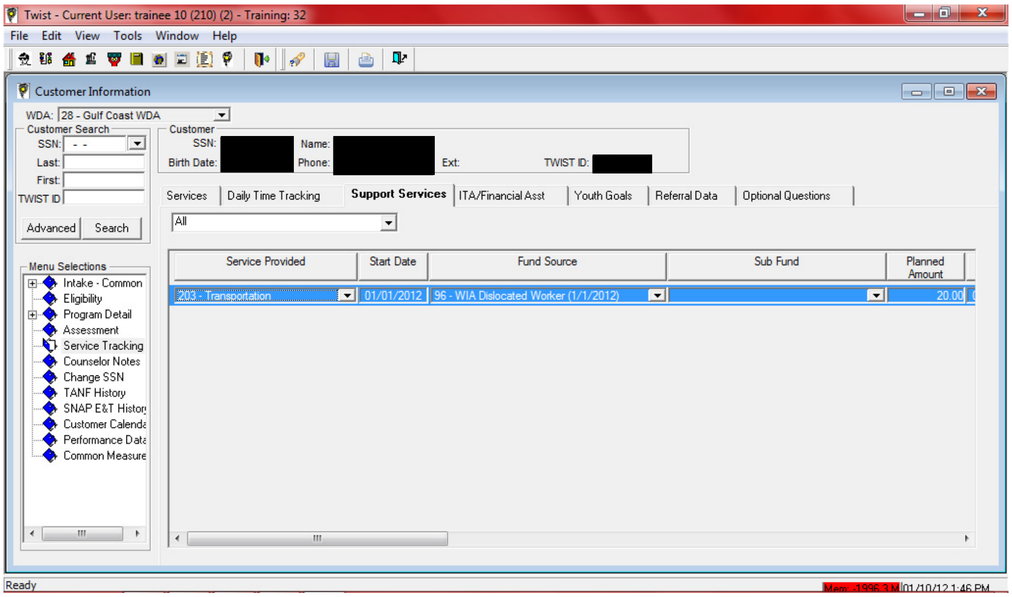
IMPORTANT NOTE:

Disallowed costs may result if payment of financial aid is not correctly documented in TWIST. The process for obtaining support service monies varies from contractor to contractor. The required documentation also varies. Check with your supervisor for clarification.

From the Service Tracking menu option, click on the **Support Services** tab. The Support Services screen displays.



Right click in the **grey area to Add** a row.



Select from each of the dropdown menus in the row:

- Service Provided
- Start Date – start date of supportive service
- Fund Source
- End Date
- Actual Amount, if known
- Comments – Field limited to 225 characters

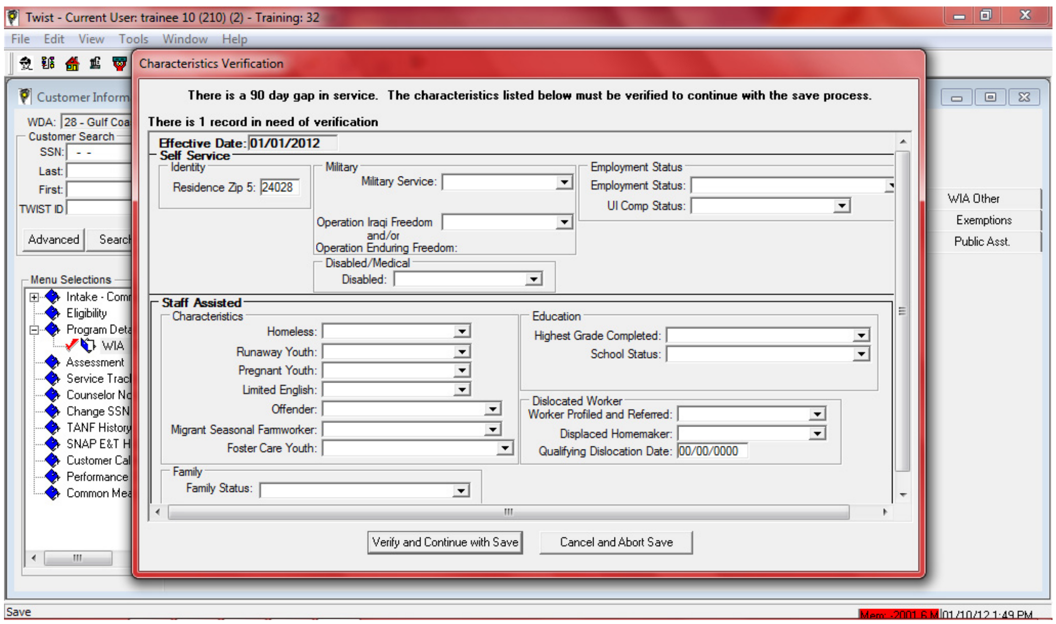
Save.

To add a duplicate support service:

- Right click in the grey area and select **Add Duplicate.**
- Another row appears that duplicates all of the information in the previous row except Fund Source and Sub Fund.
- Make changes as necessary

IMPORTANT NOTE:

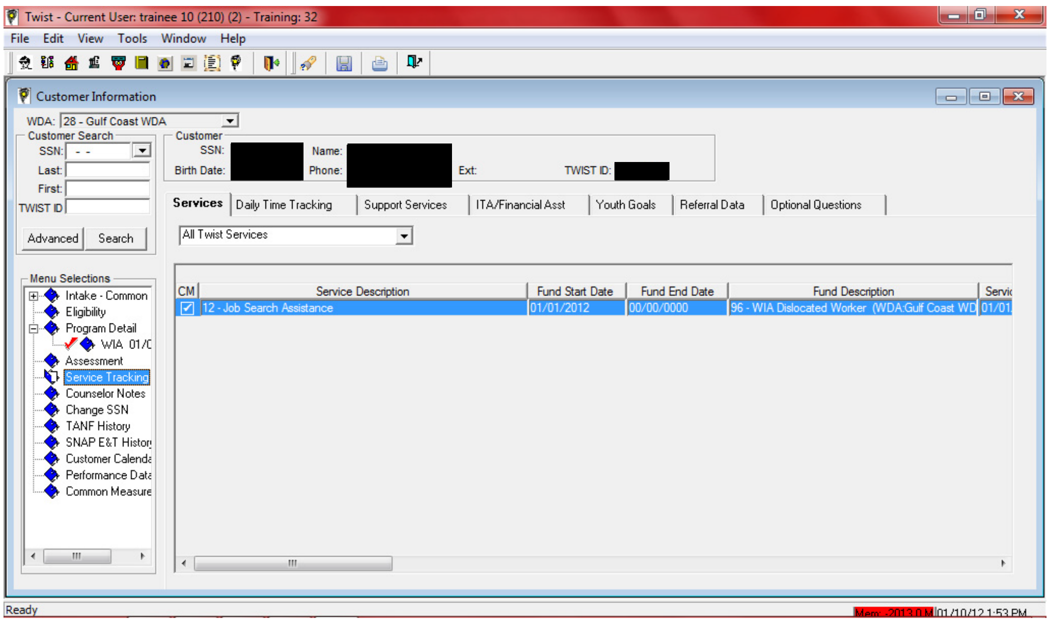
If it's been 90 days since a service was entered, a new period of participation begins in common measures. A pop-window displays reminding you to update the customer characteristics as of the date of the new service.



Complete and/or update the information and continue with the **Save**.

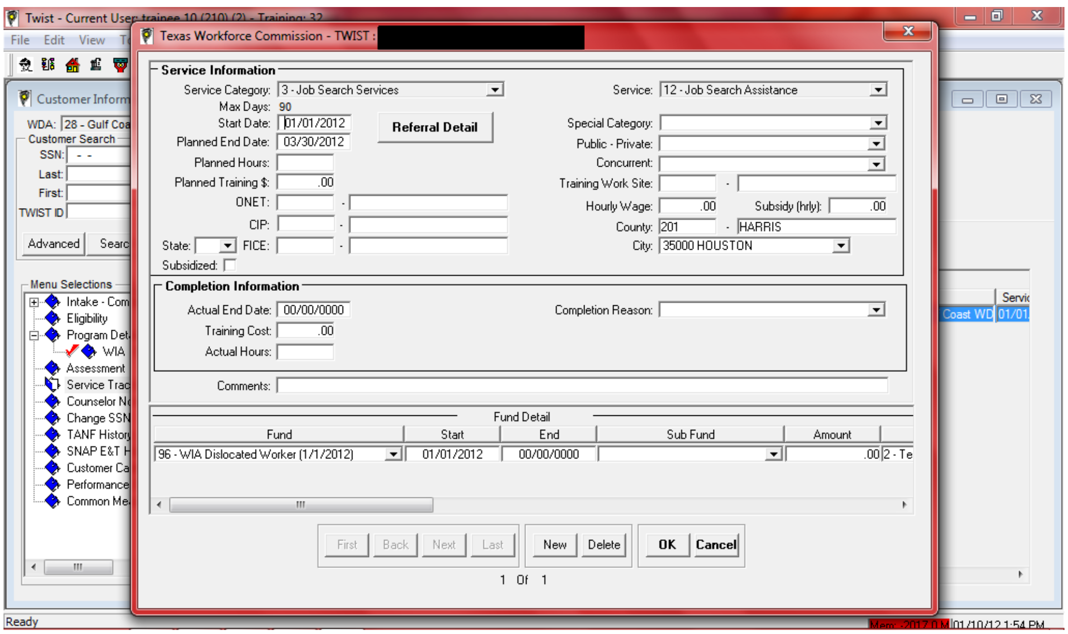
Entering Employment Information

When your customer secures employment, it is critical you record detailed information about the job. The first step (if the customer is no longer seeking employment) is to close all open services.



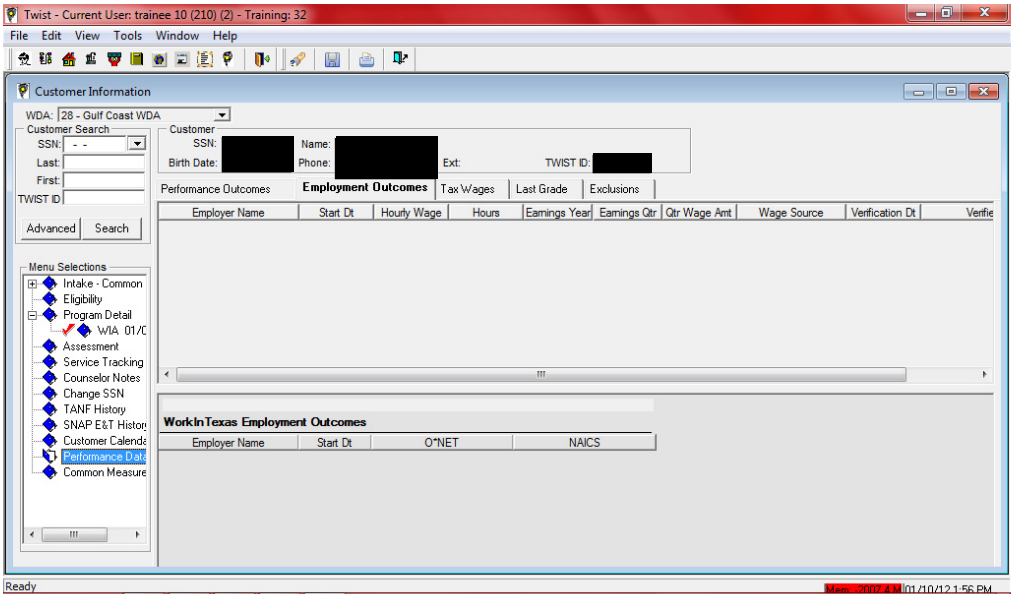
From the Service Tracking menu selection, double click on Open Services. The Service Information screen displays. Complete the "Completion Information" including:

- Enter the Actual End Date
- Select a Completion Reason from the dropdown menu
- Use the same end date for Fund Detail



On the customer information screen, select **Performance Data** from the Menu Selections on the left. The Performance Outcomes screen displays.

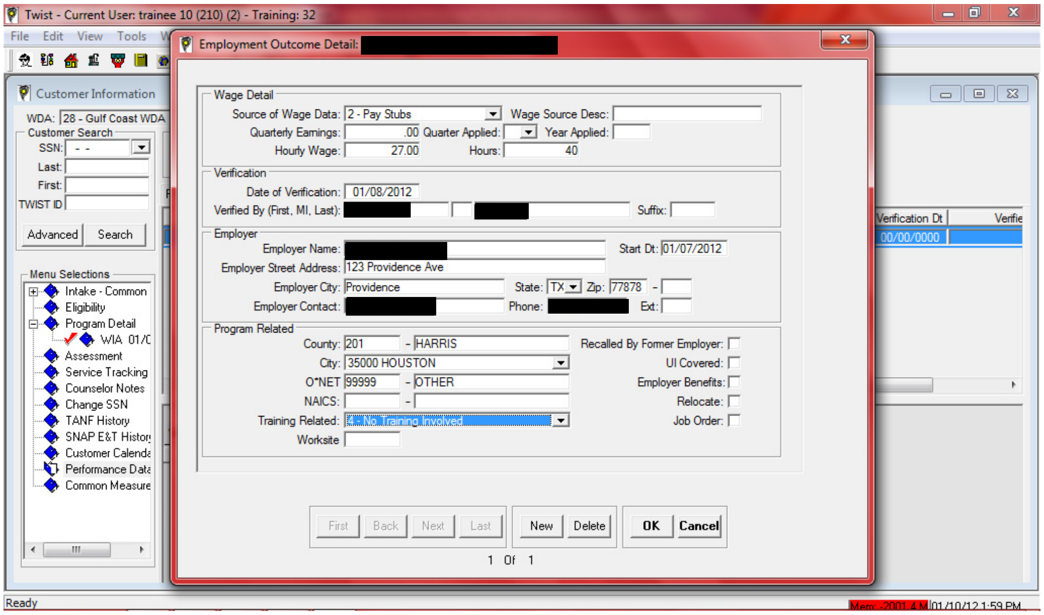
Click the **Employment Outcomes** Tab. The Employment Outcomes screen displays.



The Employment Outcome screen contains two sections:

- The top section will display the employment/supplemental wage information entered in TWIST.
- The bottom section displays employment outcomes from WorkInTexas.com. If these employment outcomes should be tracked for common measures, they must be copied to TWIST. Select the row containing the employment outcome information that is to be copied to TWIST, and click on the '**Copy selected row to TWIST**' button. The WorkInTexas.com employment outcome information will then display in the top of the screen as well. Completion of any required fields that are missing information must then be completed.

In the top section, right click and select **Add**. The Employment Outcome Detail window displays.



The Employment Outcome Detail screen serves two purposes:

- To record employment information when any customer obtains employment while receiving Workforce Solutions services (multiple employment records may be entered).
- To record supplemental wages when a customer obtains employment and wages will not be reported through any wage record system.

The Employment Outcome tab contains several fields listed below. An asterisk (*) indicates a required field.

- Source of Wage Data
- Wage Source Desc
- Quarterly Earnings (estimate if necessary)
- Quarter Applied (required). Enter the quarter in which the customer became employed.
- Year Applied

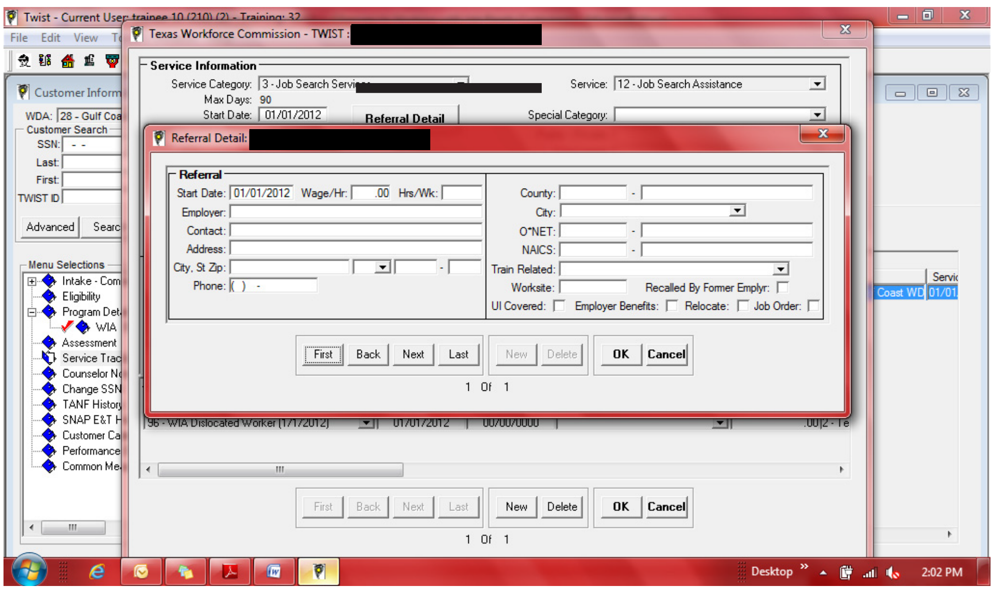
Needed only if the employer doesn't report UI wages to the state of Texas.

- Hourly Wage *
- Hours *
- Date of Verification *
- Verified By (First Name, MI, Last) *
- Start Date *
- Employer Name *
- Employer Street Address *
- Employer City, State, Zip *
- Employer Contact, Phone *
- County — City
- O'Net* — NAICS *
- Training Related * — Worksite
- Recalled by Former Employer — UI Covered
- Employer Benefits — Relocate
- Job Order

Employment information from non-UI-contributing employers will not be viewed as Supplement Wage information or counted for Common Measures Outcome <u>unless</u> the Quarterly Earnings and Quarter Applied are entered.

Referral Detail

The Referral Detail button is on the Service Detail screen. Clicking this button displays a screen for entering employer information which also populates the 'Referral' tab.



The Referral Detail screen is used with the following service codes:

- 12 Job Search – Enhanced
- 40 Community Services*
- 42 Subsidized Work* (previously named Job Creation/Subsidized Work)
- 46 Other Post-Employment Service
- 51 Job Development
- 59 Workfare*
- 74 Summer Employment*

An asterisk (*) indicates the Referral Detail must be completed for these services.

IMPORTANT NOTE:

The use of the referral detail screen is optional. Whether data should be entered using this screen is based on whether the service is a job referral, one in which the customer will only be working as required participation (i.e. community service), or the job is 100% subsidized, etc.

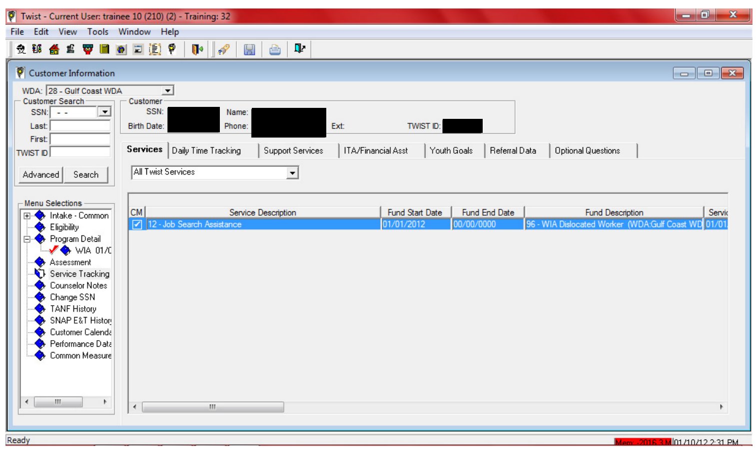
If the employer/employment information should be entered as reportable employment, go to the Employment Outcome Detail screen to enter this information.

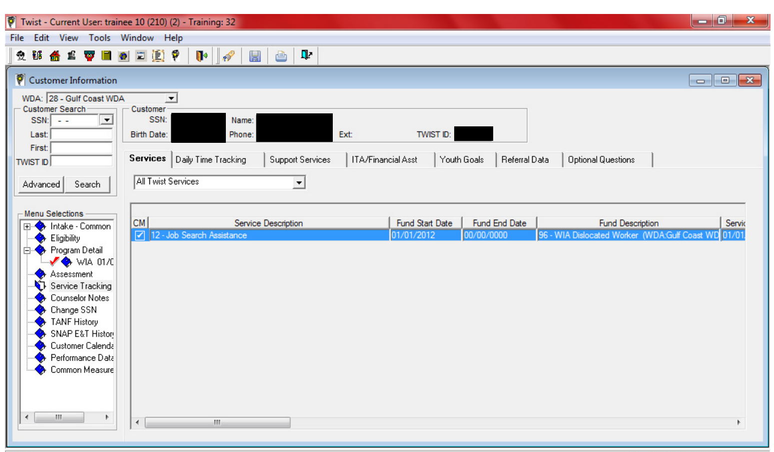
Recording Employment for TANF and SNAP-Funded Customers

Record employment for TANF and SNAP-funded customers differently than for other customers. All services must be closed first, then open a new service "Unsubsidized Employment."

- For SNAP-funded customers, close "Unsubsidized Employment" the same day it's opened.
- For TANF-funded customers, the service remains open until HHSC closes the case. Then the PTS closes the record in TWIST.

On the customer information screen, select **Service Tracking**. The Services tab displays.





The first step (if the customer is no longer seeking employment) is to close all open services.

Unsubsidized employment may include:

- Full-time or part-time employment: wages paid in full by the employer,
- Internship: wages or stipend paid in full by the employer, or
- Self-employment: an income-producing enterprise that is established or prospective.

  Self-employment must be verified and documented using documents provided by the customer to verify the existence of the customer's self-employment enterprise before cooperation can be tracked. The form "Verification of a Self-Employment Enterprise - List of Acceptable Documents" is given to all customers in the initial orientation. Documents may include:

  - Federal income tax forms or quarterly income reports, such as Form 1040, Schedule C, F, or SE federal income tax returns for the most recent tax year
  - Property titles, deeds, or rental agreement for the place of business; recent business bank, phone, utility, or insurance bill; or recent state sales tax return
  - Business records that provide proof of income and expenditures, such as copies of money orders or checks received, with lists of individuals/customers served (if available); or personal wage records with third-party signed verification; or business plans
  - Other evidence indicating the customer is preparing to open a business, such as advertising, state tax registration, assumed name certificate, business plan, or bank account information. We cannot accept a **receipt** as documentation for self-employment income.

Document the initial verification in TWIST Counseling Notes and keep a copy of the verification documents (electronic or paper) in the customer's file.

Counseling Note Example:

Subject: Self-Employment Initial Verification

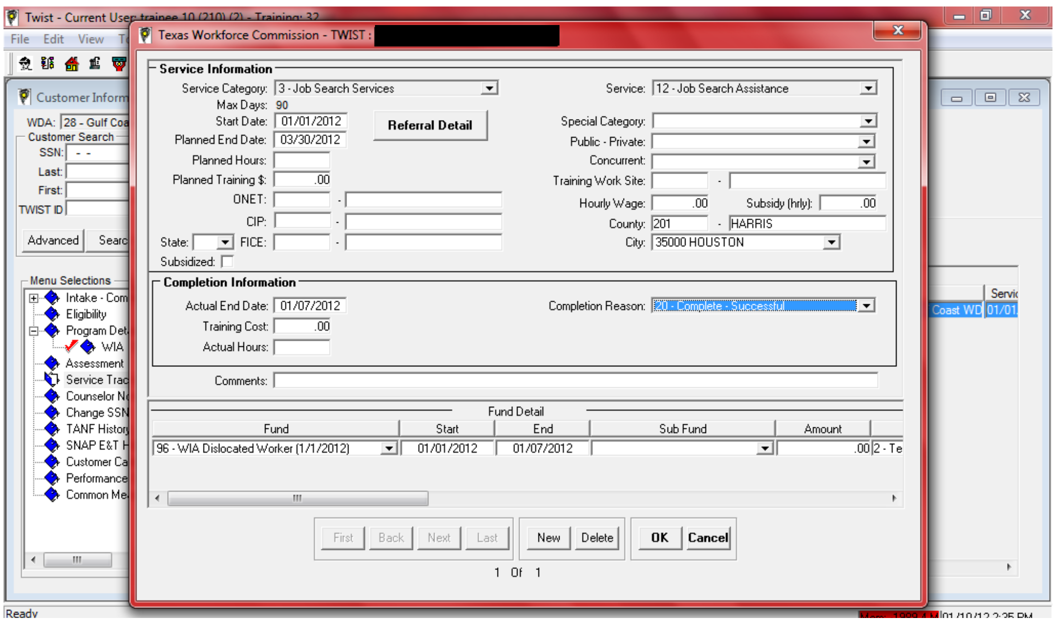
Mary Jones is self-employed as a house cleaner. She currently has 2 clients who pay her $50 each week. Mary provided a copy of a recent check received from one of her clients in payment of her cleaning service. She also provided names and contact information for her clients. She has no business expenses as her customers provide their own supplies. Copies of the check and client list are filed in the customer's e-doc file.

For education, volunteer work and employment, customers report their time and activity using the Workforce Solutions Verification of Hours form, paycheck stub(s) other payroll documentation, attendance records from the service provider, a letter or email directly from the employer, or self-employment invoices, copies of checks, or receipts.

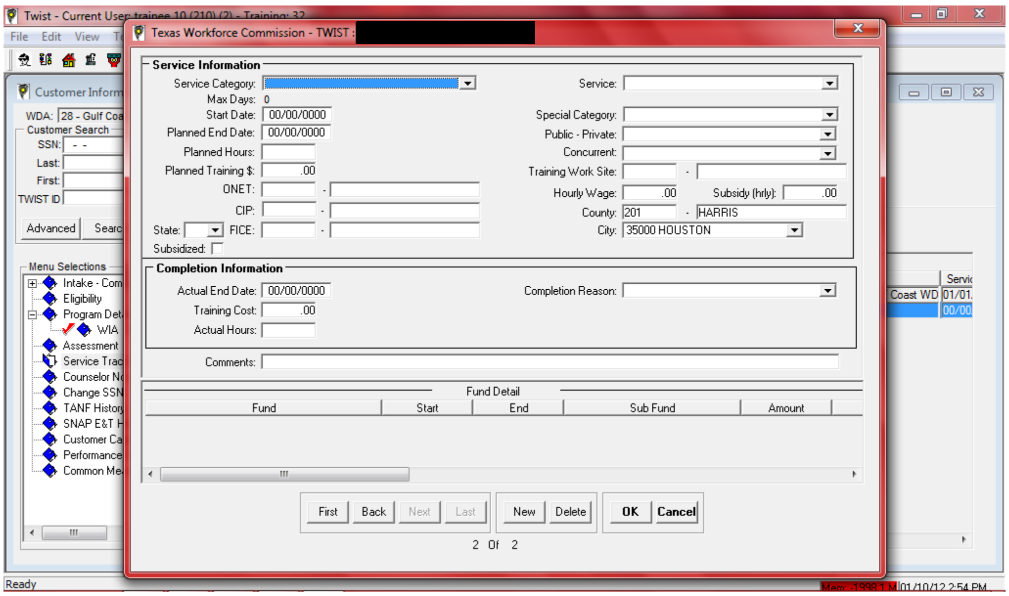
- A customer may fax, mail or hand-deliver Verification of Hours forms to her career office on or by the day office staff have specified to her that the forms or other documentation is due.
- For ongoing monthly verification of a self-employment enterprise, a customer must submit:
- Documentation providing information about the amount of income generated and the associated business expenses, which must include:
  - Invoices signed by his or her clients/customers with at least the following information:
    - Client/customer names and contact information;
    - Dates and locations of services provided; and
    - Amounts received; and
  - Business expense receipts that substantiate the expenses to be deducted from the gross income, when applicable.

From the Service Tracking menu selection, double click on the open service you want to close. The Service Information screen displays. Complete the "Completion Information" including:

- Enter the Actual End Date
- Select a Completion Reason from the dropdown menu
- Use the same end date for Fund Detail

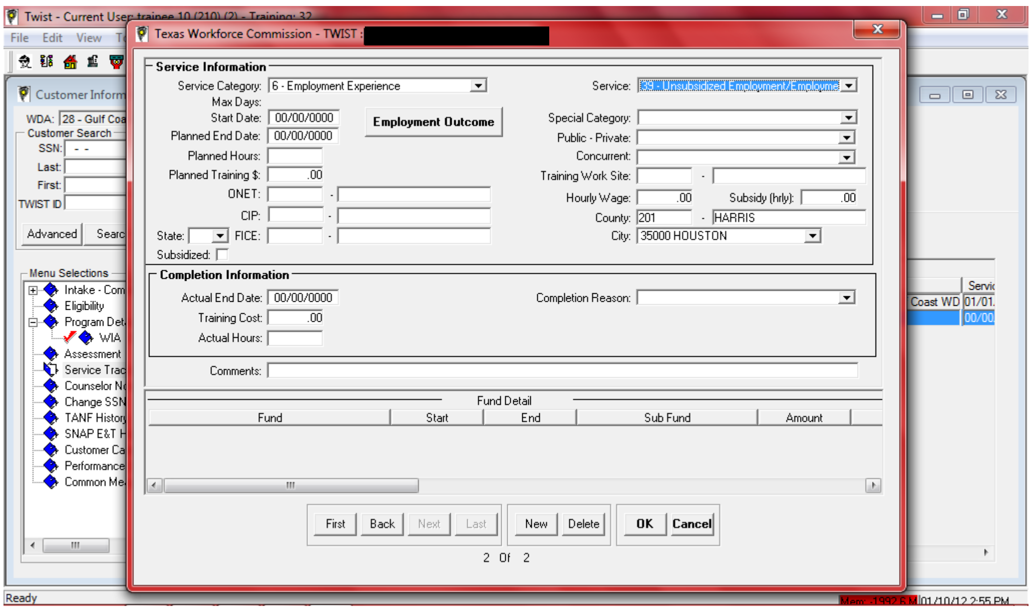


The second step is to open the service, Unsubsidized Employment. From the Service Tracking menu, right click and select **Add**. The Service Information screen displays. Notice there is not an Employer Detail button displayed.



Select 6 – **Employment Services** from the Service Category dropdown menu.

Select 39 – **Unsubsidized Employment** from the Services dropdown menu. The Employment Outcome button displays.



Unsubsidized employment may include:

- Full-time or part-time employment: wages paid in full by the employer,
- Internship: wages or stipend paid in full by the employer, or
- Self-employment: an income-producing enterprise that is established or prospective.

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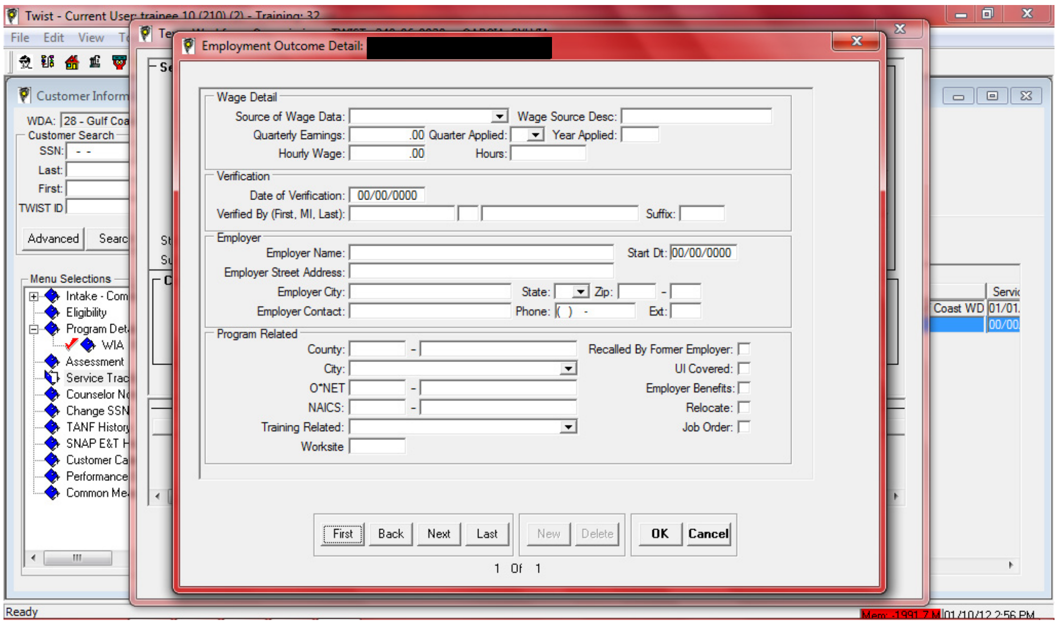
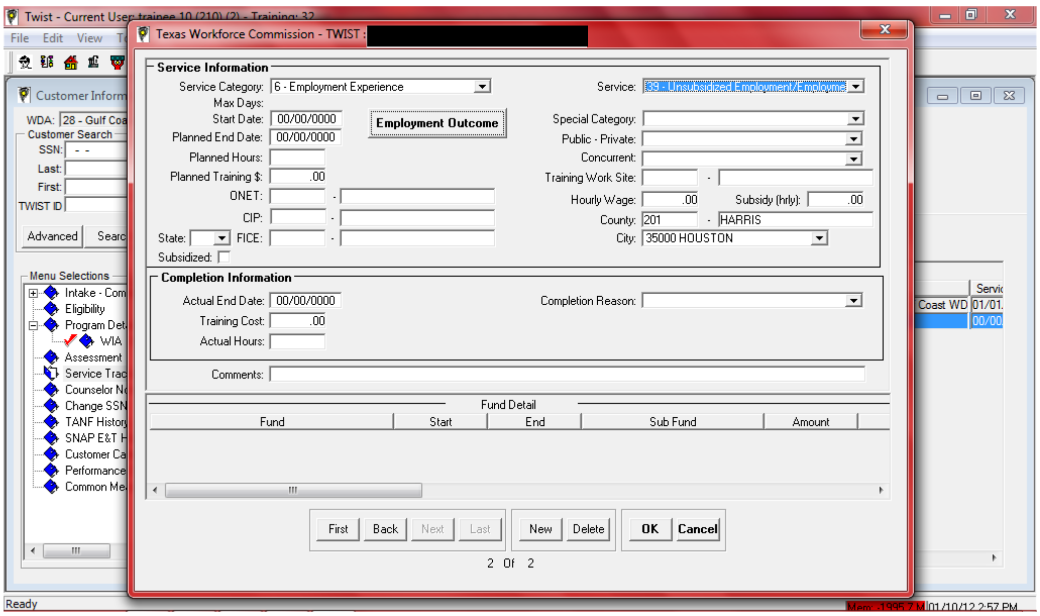
For education, volunteer work and employment, customers report their time and activity using the Workforce Solutions Verification of Hours form, paycheck stub(s) other payroll documentation, attendance records from the service provider, a letter or email directly from the employer, or self-employment invoices, copies of checks, or receipts.

- A customer may fax, mail or hand-deliver Verification of Hours forms to her career office on or by the day office staff have specified to her that the forms or other documentation is due.
- For ongoing monthly verification of a self-employment enterprise, a customer must submit:
  - Documentation providing information about the amount of income generated and the associated business expenses, which must include:
    - Invoices signed by his or her clients/customers with at least the following information:
      - client/customer names and contact information;
      - dates and locations of services provided; and
      - amounts received; and
    - Business expense receipts that substantiate the expenses to be deducted from the gross income, when applicable.

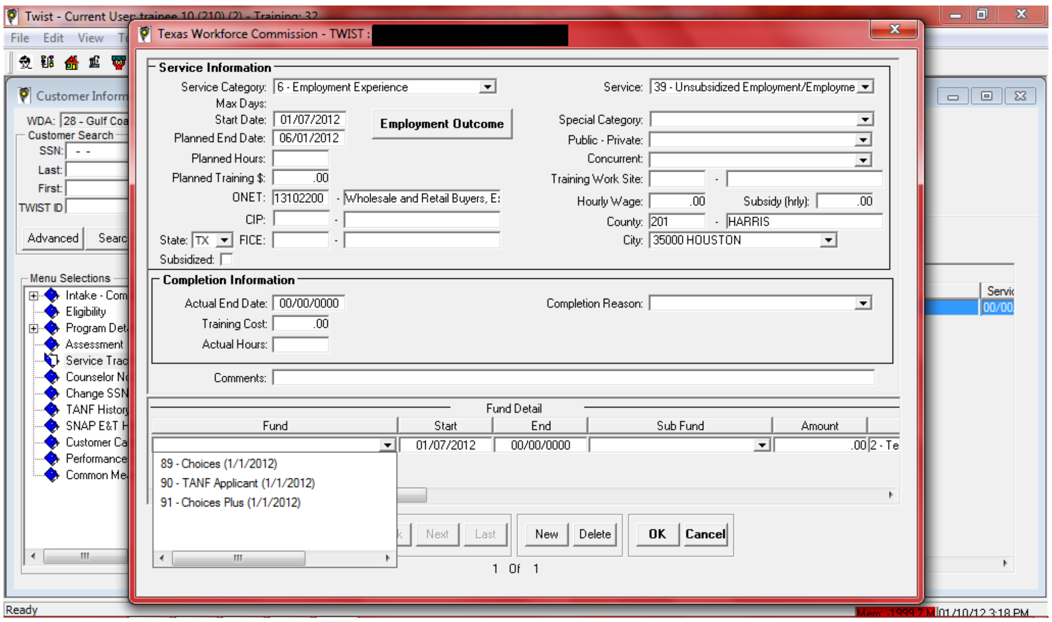
Click on the **Employment Outcome** button. The Employment Outcome window displays.



Complete the fields on the **Employment Outcome** screen. Click **OK**. The Service Information screen re-displays.



Enter the **start date**. Right click in the **Fund Detail** and select either the **Choices** or SNAP fund and the **Start Date**.



TWIST Data Integrity

The TWIST data integrity process monitors performance-related data updates and/or changes. A notification occurs when data is not entered in a timely manner. The notification initiates a process to request approval of the newly entered data.

IMPORTANT NOTE:

Data integrity notifications do not relieve you from the responsibility of entering data the day it is received.

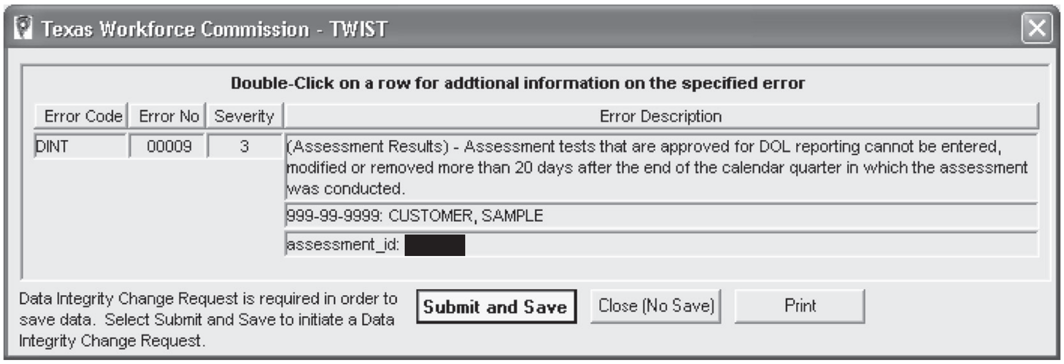
Process

The data integrity process specifically limits data integrity edits to the fields that impact performance reporting including adding, modifying, and deleting data regarding:

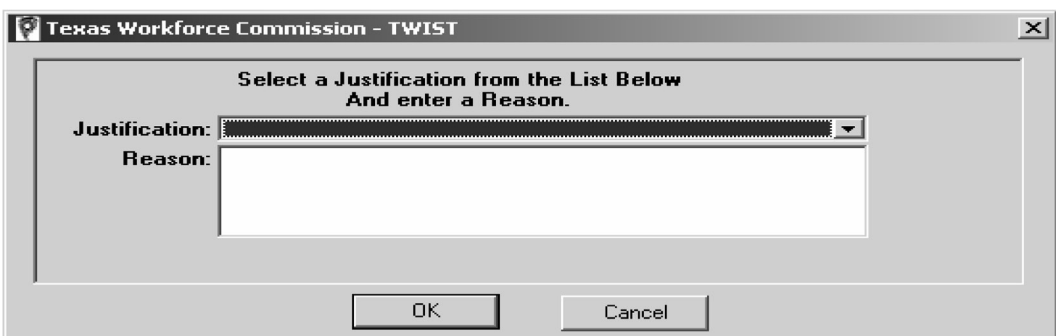
- Actual End Date and Start Date
- Assessment
- Education Outcomes
- Employment Outcomes
- Fund Codes
- Performance Exclusion
- Program Detail
- Services
- Supplemental Records

The following data integrity edit notification displays when you attempt to save data past the entry deadline:

> "Data Integrity Change Request is required in order to save data. Select Submit and Save to initiate a Data Integrity Change Request."



Error messages not pertaining to data integrity must be resolved before proceeding with the Data Integrity Change Request. If the data integrity error message is the only error displayed, you may select Submit and Save. The Justification and Reason screen displays.



Select a Justification from the dropdown list and provide an explanation for the request in the Reason field. Be specific in your reason and explain why the data entry was not performed timely. Click OK. **Record the justification and reason for the data integrity change request in Counselor Notes.**

TWIST transmits the data integrity change request to authorized staff in your organization. They are responsible for ensuring there is sufficient justification for modification of data.

- If authorized staff in your organization approves the request, TWIST forwards the request to board staff for approval. If authorized staff deny the request, they enter a reason for the denial and the status of the request updates to "Local Area Denied." The data integrity process concludes when the request is denied, the request remains in TWIST, and data in TWIST remains unchanged.
- If board staff approves the request, TWIST forwards the request to the Data Integrity Unit in the state office. If board staff denies the request, the data integrity process concludes, the request remains in TWIST, and data in TWIST will remain unchanged.
- If the request is approved by the state, TWIST performs a final validation of the data integrity change request. If no errors are found, the status is updated to TWC DIU Approved - Changes Applied and the requested changes are applied and displayed in the appropriate fields in TWIST. If the Data Integrity Unit denies the request, the status of the request updates to TWC DIU Denied with the denial reason displayed. The data integrity process concludes once the request is denied, the request remains in TWIST, and data in TWIST remains unchanged.

IMPORTANT NOTE:

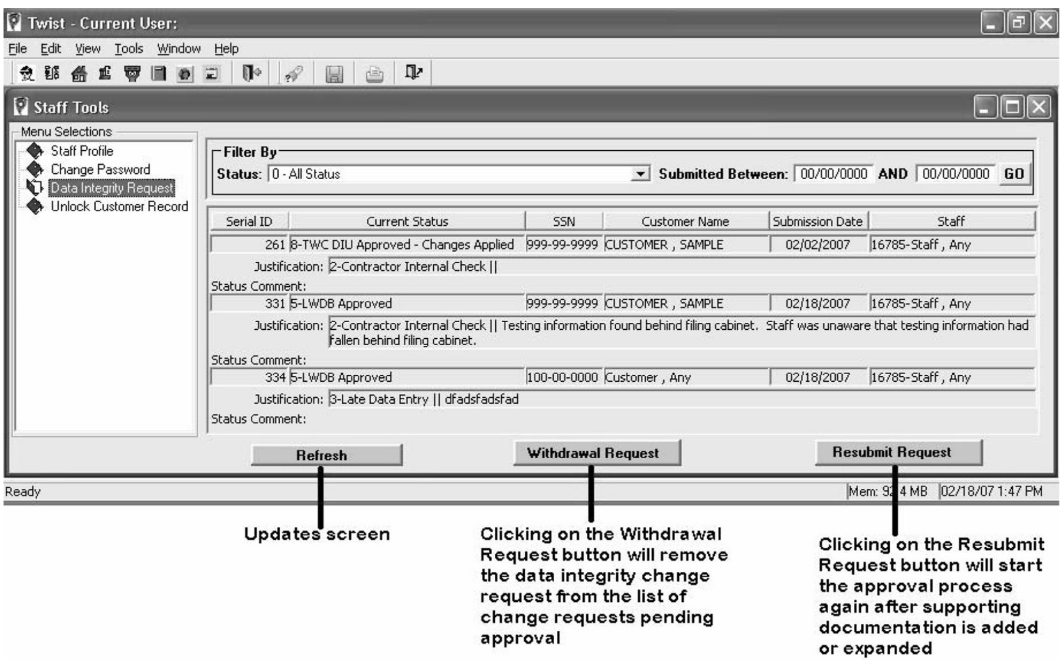
All data in TWIST remains unchanged until state office staff approves the request. Changes cannot be made to the data integrity change request after it has been initiated.

Status Checks

It is your responsibility to check the status of your data integrity change request. The status of requests can be reviewed throughout the data integrity approval process.

If the request is denied, a reason for the request displays. Modify the supporting documentation as noted in the denial reason and resubmit the request. Once Resubmit Request is clicked the approval process will start from the beginning.

To view the status of a data integrity change request, click on Data Integrity Requests from the left menu under Staff Tools.



Use and Definition of Services

Period of Participation – The period from the date the customer receives the first primary service until Exit. Exit occurs when the customer chooses not to receive a primary service for 90 days and there is no planned gap in service. The exit date is the date the customer last received a service during the period of participation.

Primary Service – A service that can begin or sustain a customer's period of participation. A primary service is directly related to helping a person enter and retain employment, improve skills/education, and/or increase earning. Outreach/Intake/Orientation is NOT considered a "Primary Service." Primary Services offered through Workforce Solutions include:

- Assessment/Case Management
  - Comprehensive Objective Assessment
  - Case Management
  - Counseling

- Job Search Services
  - Job Development
  - Case Managed Job Search

- Training Services – Occupational Skills
  - Occupational/Vocational Training
  - Work Experience
  - Private Sector Training Programs

- Training Services – Other
  - Basic Education Skills/ABE
  - English as a Second Language
  - High School
  - GED
  - Life Skills
  - Short-Term Pre-vocational Services
  - Tutoring/Study Skills/Instruction
  - Alternative Secondary School
  - Pre-Employment Skills
  - Leadership Development

- Employment Services
  - Community Service
  - Unsubsidized Employment/Employment
  - Workfare
  - Summer Employment

- Support Services
  - Supportive Service – Job Search Allowance
  - Supportive Service – Relocation Allowance

In addition, certain criteria are assessed to determine whether a service is considered primary. These criteria may include:

- The funding stream used to pay for certain services
- Who provides certain information
- Whether certain services are self- or staff-assisted

A chart outlining which services are primary or qualifying versus which are non-qualifying is in the Appendix. The chart also includes:

- WIT to TWIST codes and acronyms
- Service Labels
- Service Descriptions
- Common Measures Y/N
- Service Prevents Exit Y/N
- Basic or Enhanced Service
- Maximum Days of Service
- Notes

Time Limits – Certain services have time limits. Time limits include:

- One day service – a service provided and completed on the same day (start and end date are the same). In those rare occasions when the service is provided on multiple days, use the new TWIST function 'Add Duplicate' on the Service Detail screen to add the subsequent service.

- One calender month service – a job search service is allowed to be open for up to one month. If the service is not closed by the last day of the month, TWIST will automatically soft close the service.

Exit: Occurs when service delivery is complete. Service delivery is considered complete when a service has been tracked for 90 days without a qualifying service and there is no "planned gap" in service. The Exit date is the end date of the last qualifying service. Follow-up and other non-qualifying services may be provided after Exit. When a qualifying service is provided after Exit, a new period of participation begins.

Planned Gap in Service: Staff may plan a necessary gap in service for customers up to 180 days to prevent exit of the customer record when additional service is planned. Use service code 11 (Planned Gap in Service) for the following reasons only:

- Delay before the beginning of training
- Health condition
- Providing care for a family member with a health condition
- Temporary move from the area that prevents the customer from participating in services

IMPORTANT NOTE:

When tracking a planned gap in service, staff is **required** to document in the following TWIST Counselor Notes:

- Period of the planned gap
- Reason for the planned gap
- Service to be provided after the planned gap in service

More than one planned gap in service may be entered, if circumstances justify it. However, the use of this code will be closely monitored.

Entering Counselor Notes

You must enter counseling notes in TWIST to record information about the customer that is not found anywhere else in the Workforce Solutions MIS. Good counseling notes are important because "if it's not in the customer's record, it didn't happen." Poor documentation can lead to incorrect assessments of the customer and decisions based on limited information. Issues to include in documentation are:

- Why services were not delivered as scheduled
- Barriers to accessing services in a timely manner
- Whether services delivered were consistent with the customer's employment plan
- Progress toward completing training or reaching goals
- Why changes in services are needed
- Specifics about support services added

Basic Documentation Guidelines

Typically, the initial entry into the counselor notes section of TWIST provides a short summary of why the customer wants and needs services. Enter each note in an individual and separately posted note. Each note will show the name of the staff person who created it and the date the note was created/saved.

Counselor notes show and explain any changes in the direction of the service process. Common reasons for changes include:

- Personal circumstances
- Decisions to change career paths
- Decisions to stop looking for work
- Decisions that Workforce Solutions services are no longer needed
- A need to look for a better job once the customer accepts work

Information included in counseling notes must:

- NOT duplicate what is found in other parts of any of the Workforce Solutions MIS elements – TWIST, WorkInTexas.com, FAMS, unless it will help the reader better understand.
- NOT include information indicating that an effort was made to call the customer but no conversation took place.
- NOT include statements indicating there has been no change in the customer's planned course of action or circumstances.
- ALWAYS include the customer's next step in the process.

Recording Information Gathered from Workforce Solutions Job Search Map

The Workforce Solutions Job Search Map serves as the employment plan for any customer who is not in training or is not tagged as WIOA Youth. It is not necessary to complete a TWIST service plan on customers whose needs and direction are explained in the map unless they are in training or tagged as WIOA Youth. The job search map also replaces any requirement for counselor notes to explain expanded service.

You must enter the information gathered from the map into counselor notes either by copying and pasting the completed Job Search Map into counselor notes or including the answers in the narrative of your initial assessment. Use the e-version of the map, located at http://www.wrksolutions.com/staff-resources/services-we-offer/career-office-services, to record the information as it is gathered. Then, simply copy and paste the map into your notes.

Copy the map into counselor notes for customers who:

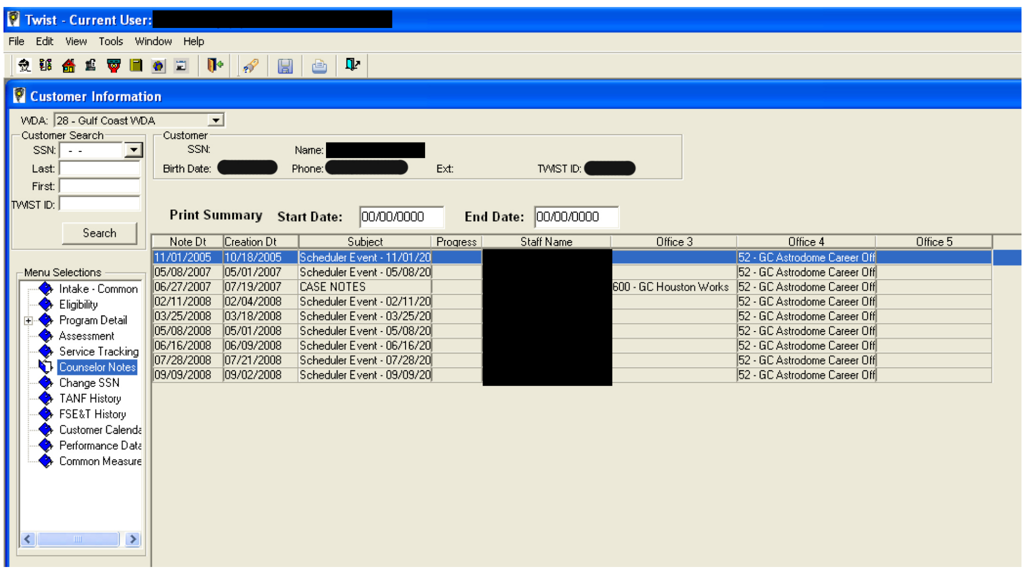
- Get an orientation required to receive benefits from the Texas Health and Human Services Commission (HHSC)
- Receive one time financial aid under $200 and do not have a job or job offer at the time they first receive this financial aid
- Are receiving one time financial aid under $200 who have a job offer or a job; but, in your judgment, need a conversation about keeping a job.
- Are receiving expanded service and identified in TWIST under any fund source and are not receiving financial aid

IMPORTANT NOTE:

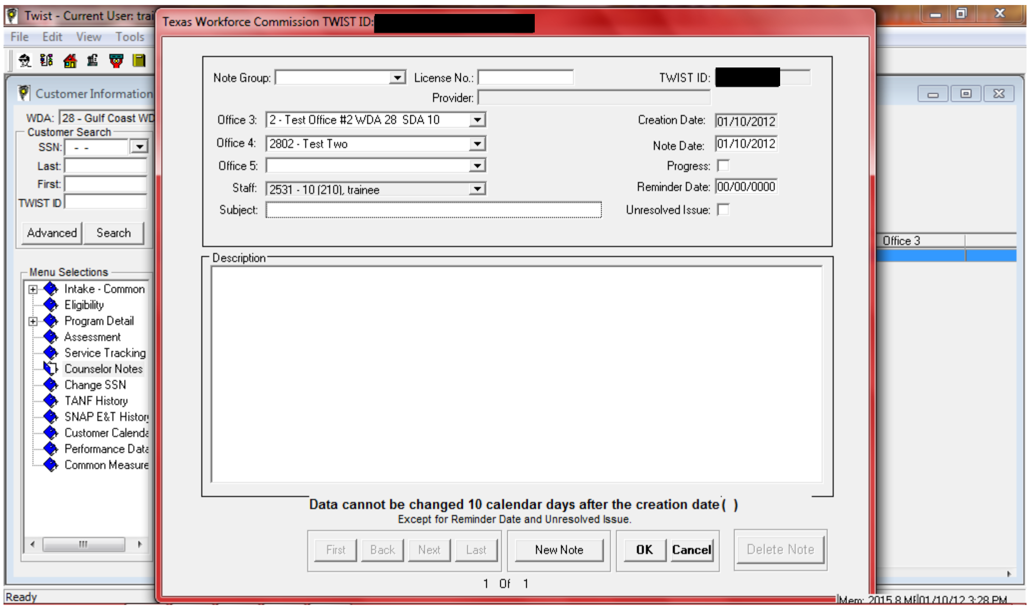
The Job Search Map does not replace the need to enter other relevant information, not found elsewhere, into counselor notes.

To open counselor notes:

Click on **Counselor Notes** in the left menu. A list of counselor notes for your customer displays.



Right click in the **grey area** and select **Add, or double-click to open the current note**. The notes screen displays with your staff profile and date defaulted.



The Standard Fields

Each Counselor Note has standard fields within the TWIST screen. These fields are as follows:

- Office 3 and Office 4 – These fields auto-populate with the names of offices listed in the staff person's profile. Staff can change these to any office listed in the drop down menu.
- Office 5 – When it is necessary to use, office staff may select an office name from a list of offices in a dropdown menu.
- Staff - This field auto-populates with the name of the staff person logged onto TWIST. The staff name cannot be changed.
- Note Date - This field auto-populates with the date the note is being created. The date can be changed to another date as long as it's not a future date. For example, if you are recording a counselor note to explain an action taken in January 2012, you can use the Note Date to tie the current note to the earlier action.
- Creation Date – The creation date auto-populates with the date the note is created and saved. This date cannot be changed.
- Progress – This field indicates the customer has made progress toward her goal(s) when staff checks the box marked "Progress."
- Subject – This field indicates the purpose or subject matter of the particular Counselor Note. Subject is a required field. Select the appropriate subject line from the TWIST Counselor Notes Subject Lines desk aid.

Enter notes.

Click **OK** and **Save**.

Note: You can not delete a note once it has been saved, and notes can not be edited after 10 days.

Confidentiality

Avoid documenting any medical or disability information in Counselor Notes. This information must be kept in a separate office file (apart from all other information about the customer).

NOTES