

|  |  |
| --- | --- |
|  | **WS 13-20** |
|  | **June 25, 2013** |
|  | **Basic and Expanded Service; Financial Aid** |
|  | **Expires: Continuing** |

# To: Career Office Contractors

From: Mike Temple

 Lucretia Hammond

 David Baggerly

Subject: Managing Financial Aid – Documenting Referrals – Child Care – TANF or SNAP

##### Purpose

Add instructions for documenting attendance card information to counselor notes when documenting referrals for TANF applicants, TANF volunteers, TANF recipients, or SNAP recipients who request child care financial aid.

This Issuance replaces Issuance 10-05 Managing Financial Aid – Documenting Eligibility for TANF and SNAP E&T.

##### Background

In accordance with Issuance WS 13-03, we document in TWIST the actions we take when providing financial aid for child care to customers who are TANF applicants, TANF volunteers, TANF recipients or SNAP recipients.

##### Changes

We updated the data elements for Counselor Notes to include a record of the discussion with the customer about her need for an attendance card. We combined guidance into a single Desk Aid: Documenting Referrals – Child Care – TANF or SNAP

Procedures

Each time we take an action on child care financial aid for TANF applicants, volunteers, recipients or SNAP recipients, we will document the action by completing and copying/pasting the appropriate template found in the Desk Aid - Documenting Referrals – Child Care – TANF or SNAP into a TWIST counselor note.

The subject line of the TWIST counselor note will be the specific action noted in the Desk Aid. (e.g., “Child Care Referral – Provide Aid”)

Each time a staff member takes one of these actions affecting a customer’s financial aid – the relevant template and corresponding data elements must appear in TWIST Counselor Notes with the appropriate subject heading.

Action

1. Review these instructions with staff and make sure each staff member understands how to use the Desk Aid - Documenting Referrals – Child Care – TANF or SNAP. Staff should begin applying these guidelines by June 26, 2013.
2. Ensure office managers and supervisors work with staff to completely and accurately record a customer’s referral data in TWIST Counselor Notes the same day the action is taken.

Questions

Staff should first ask questions of their managers or supervisors.  Direct questions for Board staff to the staff web [Issuances](http://www.wrksolutions.com/staff-resources/issuances) Q&A at the Staff Resources.

Links

* [Desk Aid – Documenting Referrals – Child Care – TANF or SNAP](http://www.wrksolutions.com/staff-resources/performance-improvement/desk-aids)