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| **WS 14-03 Revised** |
| **November 13, 2014** |
| **Service Matrix** |
| **Expires: Continuing** |

To: Career Offices

Financial Aid Payment Office

# From: Mike Temple

David Baggerly

Lucretia Hammond

Subject: Reporting When Customers Begin and Stop Receiving Services

Purpose

Ensure we accurately record when customers begin and stop receiving services they actually receive from Workforce Solutions. This issuance replaces Issuance WS 14-3 Reporting When Customers Stop Receiving Services dated April 22, 2014. Primarily this issuance adds new information concerning significant changes to TWIST regarding the recording of services.

Background

It is important to accurately record service and outcome data for our customers. We use this data to (1) manage, monitor and improve our service and (2) to assess our performance.

Accurate customer data

* Helps staff deliver quality service. Staff’s timely data entry of accurate information about a customer and our service for her makes sure that when she contacts another office or system unit for assistance, the staff at that location can quickly see how we have already helped and what else we might need to do to help the customer meet her employment goals.
* Provides a clear picture for quality assurance checks. When staff enters data about a customer and our service to him timely, accurately, and in a concise, clear manner, quality assurance can easily see the good job staff and the office are doing and confirm that service is aligned with Workforce Solutions standards and guidelines.
* Offers an accurate picture of opportunities to improve. Timely accurate data in our systems helps managers see better where opportunities for improvement may exist – and helps ensure that what managers are looking at really is what is happening in our offices and operational units.
* Gives decision makers and funders information on our success. Good data placed timely in our systems means that the information about our performance and production is accurate. This allows decision makers and funders to trust that our numbers truly represent good work – and always gives us feedback on how far along we are in achieving the Workforce Board’s expected results.

TWIST and WorkInTexas.com are our permanent case files for customers. All information we enter in both systems must be clear, complete, concise, and accurate.

Beginning October 1, 2014, the state will make changes to TWIST that will support our efforts to record when customers begin and stop receiving services they actually receive from Workforce Solutions.

Regular Contact

Customers in any service planned to extend more than 30 days must maintain *regular contact* with Workforce Solutions. *Regular contact* ensures the customer is making progress toward her employment goals and wants to continue to receive our services. Customers who maintain contact with us are more likely to succeed.

*Regular contact* with a customer means that staff is in direct, two-way contact with the customer at least monthly:

* “Direct, two-way contact” means a customer actively contacts us or responds through some means (i.e., e-mail, text, phone call, fax) indicating her continued engagement in our service.

NOTE: Automated responses, such as an outgoing voice mail message or an out-of- office notification, do not qualify as an active response from a customer.

* Documentation received from an employer or training provider to verify attendance and progress in work experience, employment, or training and education, including by e-mail or fax, is acceptable and constitutes direct contact with the customer.
* Receipt of documentation of participation hours constitutes direct contact. Customers who are required to submit documentation to prove cooperation (i.e., TANF and SNAP recipients) are in direct contact with staff.
* Customers who regularly bring in mileage documentation to support on-going financial aid for transportation expenses are also in regular contact with us.

Recording Service

Workforce Solutions contractors and staff must:

* Record services in TWIST and WorkInTexas.com when an actual service is provided to a customer;
* Support all services in TWIST with a Counselor Note;
* Record services in TWIST and WorkInTexas.com only when actively working with a customer;
* Ensure there are accurate service dates in TWIST and WorkInTexas.com; and
* Close a service when the customer stops receiving the service or when the customer does not fulfill her requirement to contact us.

Much of the service Workforce Solutions offers extends past one day. Managers must make sure that staff actively works with customers throughout the entire period of their service – and that staff accurately records that work. This includes making sure that staff close a service timely after a customer has finished or is no longer actively engaged with Workforce Solutions.

Most services that are not one-day services will have a Planned End Date of the end of the month the service begins. At the beginning of the following month, these services will show as “Past Due”. Career Office staff must communicate with the customer and assess their progress and needs each month. If the customer continues to want and need our assistance, staff must:

* create a Duplicate Service (click on service you want to duplicate, right click, and select Duplicate Service). Record the correct the Start Date and Actual End Date and provide additional information as appropriate (you will have to identify the fund and office attached to the service) and
* close the current service with the “Program Continuing” completion reason

If the customer no longer needs our assistance (this could be because the customer ended the service in the prior month or the PSR does not have record of the customer continuing in the service), staff must:

* close the service as of the last day the customer received the service.

If a service extends beyond a calendar month, staff must conduct this procedure for each month the customer receives the service.

The Workforce Solutions Service Matrix Desk Aid provides detailed information regarding each authorized service in TWIST. All changes identified by the Service Matrix are effective October 1, 2014.

Action

1. Make sure that managers, supervisors and staff understand the requirements of this issuance.
2. Provide training for staff on how to comply with the guidance in this issuance.
3. Ensure staff record customer services timely and accurately and close services appropriately.
4. Ensure staff uses the [Workforce Solutions Service Matrix Desk Aid](http://www.wrksolutions.com/staff-resources/performance-improvement/desk-aids" \t "_blank) when using TWIST services.

Questions

Staff should ask questions of their supervisors and managers first. Direct questions for Board staff through the electronic Q&A available for new issuances on <http://wrksolutions.com>.