

WorkinTexas.com Choices Case Management Training Guide

Approved by the

Texas Workforce Commission

Training and Development Department



Training and Development Mission

We are here to help TWC, and our partners enhance employee workplace skills and productivity through the development, coordination, and delivery of quality learning opportunities.

Texas Workforce Commission

Training and Development Department

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Choices Program: Case Management Training

Course Objectives

After completing this course, you will be able to:

- Apply terms, business concepts and program features to navigate correctly and efficiently the WorkinTexas.com (WIT) website.
- Perform system registration on behalf of program applicants.
- Search for and assist system-registered individuals.
- Perform data entry to determine program eligibility on behalf of Choices program applicants.
- Provide program services to Choices program participants.
- Perform data entry to document the programmatic needs and achievements of program participants.
- Perform ancillary staff responsibilities as needed, e.g., manage case notes, communications, and assessments on behalf of program participants.

About This Training

As we progress through this training guide, you will be working as a Staff user type while assisting an Individual user type. Although your staff **training** account privileges will be set high, your staff privileges when operating in production WIT may not be as robust.

All of the data in the training environment is fictitious. Make sure that you do not enter any Personal Identifiable Information (PII) in the training environment.

Glossary of Terms

Throughout the Choices case management training you will receive, we will reference the following terms:

- **Individual or Job Seeker** – Terms used interchangeably to describe a person who receives program services.
- **Applicant** – An Individual for whom program eligibility determination has yet to be determined.
- **Participant** – A program applicant who is actively receiving program services.
- **Staff** – Synonymous with case manager or workforce agency employee, a program expert who manages service delivery for program participants.
- **Assist** – Following system registration, staff can access a customer's profile by selecting **Manage Individuals > Assist an Individual** to manage the customer's information.
- **Currently Managing** – The section located within staff's left navigation menu that displays the name of the individual (or employer) whose account the staff user is currently managing.
- **Left Navigation Menu** – The list of staff user options staff access by selecting the **Menu** hyperlink at the top left center portion of the WIT screen.

- **Release Individual** – A hyperlink command displayed in the Currently Managing section that when selected, enables staff to stop assisting the current individual (or employer).
- **Ribbons** – The panels or containers displayed on the Programs tab screen for each program that maintain specific program details such as program services.
- **Widgets** – Quick links to specific information that are commonly used and easily accessed from the Staff dashboard. The job seeker and employer dashboards also have corresponding widgets. Widgets can be configured and customized by the staff member, job seeker or employer.
- **Wizard** – A step-by-step guide for completing a process in WIT, such as a program application form to determine program eligibility.
- **Dashboard** – Primarily used as the landing page, or the first page displayed upon log in. The dashboard is a quick way for staff members to view common items and information through widgets.
- **Enrollments** – A term synonymous with program activities or services provided to a program participant.
- **Registration** – A term with dual meaning. System Registration is how an individual (or staff user on their behalf) creates an account profile, while Program Registration refers to completion of the program application form.
- **Soft Exit** – The process by which the system automatically closes a participant's active service delivery for a single

program (i.e., Wagner Peyser, WIOA, SNAP E&T, Choices, or Trade) due to non-service for 90 consecutive days.

- **Combined Soft Exit** – The process by which the system automatically closes a participant’s active service delivery in two or more programs (i.e., Wagner Peyser, WIOA, SNAP E&T, Choices, and/or Trade), due to non-service for 90 consecutive days for each program affected.
- **Hard Exit** – The process by which staff manually creates a program outcome for the individual. This usually occurs if the individual satisfies a global exclusion reason (i.e., the individual is deceased).
- **Case Closure** – An interim step/process to officially stop the delivery of **planned** program services until the soft (or hard) exit process occurs.
- **Authorized Staff** – Staff users whose privileges enable them to perform specific functions in the system.
- **Co-enrollment** – This term is applied when an individual is enrolled in two or more federal programs simultaneously. In this context, the combined soft exit procedure will apply to individuals co-enrolled in the Wagner Peyser, WIOA, SNAP E&T, Choices, and/or Trade programs.
- **Case Assignment** – The process by which an individual is assigned to a specific case manager or a group of case managers for the purpose of receiving specialized assistance.
- **Formula Eligibility Determination** – The automated process by which the system determines applicant eligibility

for program services based solely on the data entry performed and the business rules that govern eligibility determination.

- **Business Rule** – In software development, a **logic qualifier** usually in the form of an **If-Then** clause that enforces local, state, and federal regulatory requirements within the application and determines the way the system functions.
- **Document Management** – The process by which staff obtain client documents electronically and add them to the client’s account profile.
- **Remote Signature** – The ability to affix required signatures digitally on various program forms on behalf of staff, the individual, and others as needed.
- **Case Note** – Staff-entered documentation that provides a fact-based description of an individual’s interaction with the Work in Texas system.

About the Choices Program

The Choices module provides for the full case management of the employment and training requirements for the federal Temporary Assistance for Needy Families (TANF) program. Staff can manage participants, as well as the activities and services they receive, and implement sanctions for non-compliance. The Choices module helps staff guide the participant through the entire process, providing all the necessary case management tools to manage an individual's case progress, from application to closure.

Getting Started: Staff Login

To manage service delivery to individuals through the Choices program, staff must first log in to the WIT system.

Note: Staff users do not create their own accounts. The System Administrator creates and manages staff accounts, staff logins, staff privileges, and Workforce Area assignments.

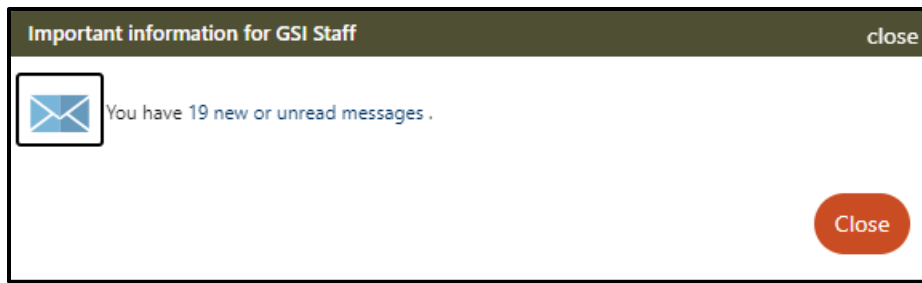
The production environment uses a **single sign-on** approach which enables you to use the same login credentials for other Workforce applications. The staff training login is generic and applies to the training environment only.

To log in as a staff user type, follow these steps:

1. Access the Home page according to the trainer's directions.
2. Click Sign In / Register.
3. Enter your assigned Username.
4. Enter the password provided by the trainer.
5. Select I'm not a robot checkbox for reCAPTCHA if applicable.
6. Review Staff Sign-in Notice text.
7. Click I agree.

Message Prompt

When any user type enters the WIT system, they will be presented with a New or Unread Message prompt like the following figure if they have at least one qualifying message:

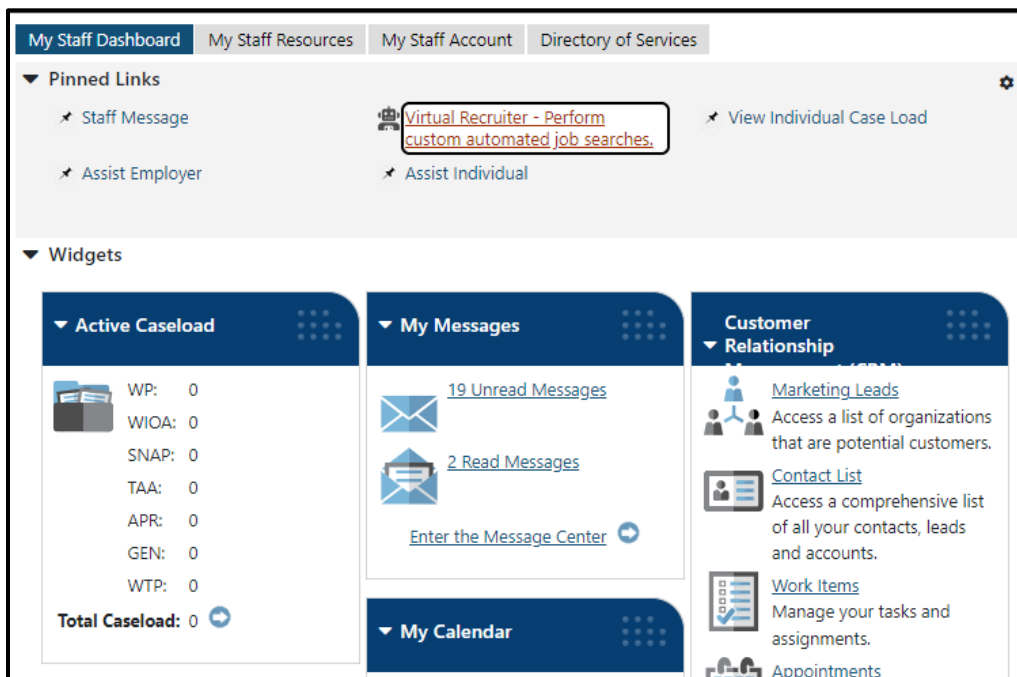


New or Unread Message Prompt

Staff may access their Message Center Inbox by selecting the hyperlink text (or the envelop icon) or click Close to view their message(s) later. For more information, see the System Overview training video.

My Staff Dashboard

By default, the WIT system will display My Staff Dashboard, as shown in the sample figure that follows.



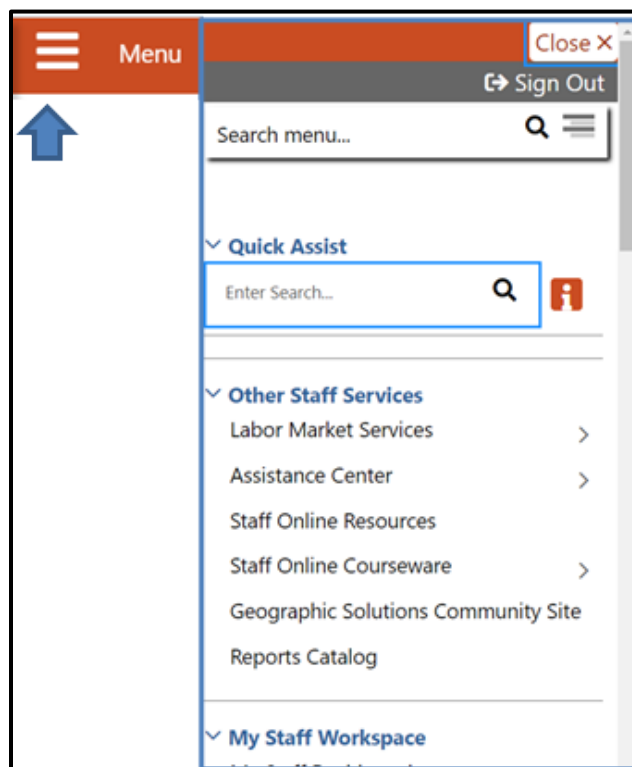
My Staff Dashboard, Excerpt

This feature is a quick way for staff members to view common items and information through widgets as soon as they log in. Widgets provide quick visual access to information that is also available through links or selections within the system. Staff can configure widgets to display at the top of the home screen. For more information, see the System Overview video.

Left Navigation Menu

The following left side-bar menu groups and headings are located under the Menu icon on the top left side (see figure below) of the WIT page.

Note: The order in which staff menu options display may vary. To edit the display, go to **My Staff Account** and scroll down to the **Preferences section**. Find **Menu Preferences** and then select your menu preferences.



Left Side-Bar Menu

The left navigation menu consists of the following options or groups for staff:

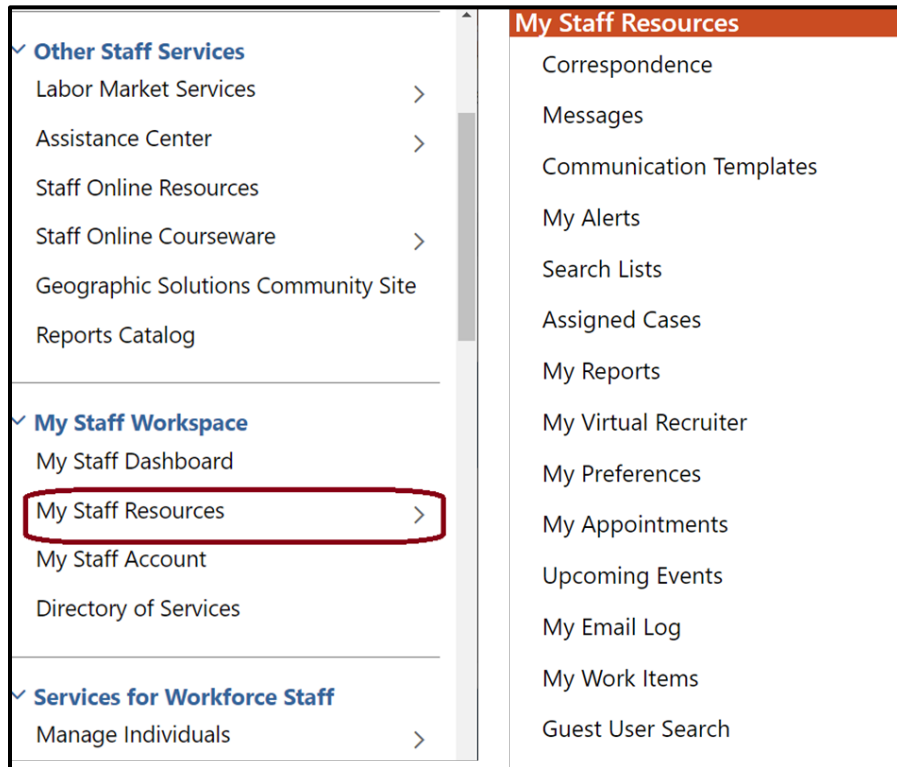
My Staff Workspace

- **My Dashboard** - Landing page when logged on to WIT that consists of Widgets.
- **Quick Assist** - The Quick Assist is available at the top of the left side-bar menu and is based on the last four digits of an individual's SSN, last name, an employer's company name or Federal Employer Identification Number (FEIN), or other criteria.
- **Other Staff Services**
 - **Labor Market Services** - View information about labor markets in your state.
 - **Assistance Center** - Find general site use information such as Quick Reference Cards.
 - **Staff Online Resources** - Develop and maintain a directory of staff member resource information using the Content Management tool in the WIT Administration system.
 - **Staff Online Courseware** - Access numerous professional online training videos and courses developed for workforce staff members.
 - **Geographic Solutions (GSI) Community Site** - GSI is the vendor for the new WorkinTexas.com software. The community site is a portal to share software **best practices** and to stay current with events and news

pertinent to a specific region, state of the U.S. labor market, and GSI product releases.

- **Reports Catalog** – Access a catalog of standard reports and email a report to other staff members. Allows for formatting a report.
- **My Staff Workspace** – General tools for staff to communicate and set preferences.
- **My Staff Resources** - Provides links to tools commonly used by staff. These include:
 - **Guest User Search** - Retrieve account information for Guests, using the guest ID in the email sent to your office.
 - **Correspondence** - View and manage letters that you have created.
 - **Messages** - View and manage your messages.
 - **Communication Templates** - View communication templates that you may have created.
 - **My Alerts** - View set alerts.
 - **Search Lists** - View saved search lists.
 - **Assigned Cases** – List of individuals currently assigned to you.
 - **My Reports** - View any saved reports.

- **My Virtual Recruiter** - View and manage Virtual Recruiter scheduler for recurring searches for job openings or candidates.
- **My Preferences** - Change the interface settings and user experience.
- **My Appointments** - View and manage scheduled appointments.
- **Upcoming Events** - View and manage upcoming events.
- **My Email Log** - View and manage emails sent or received via the system.
- **My Work Items** - For case management, this heading is not currently used.



Staff Left Side-Bar Menu - My Staff Resources

- **My Staff Account** - Provides information on how your staff account is configured, including basic login, name, address, phone, and email. Other options include:
 - **Office** - Workforce region and office to which you are assigned.
 - **Preferences** - Adjust system default settings for interface screens including alerts, landing pages for assisting individuals and employers, case note sort orders, and menu preferences for summary and detail landing pages. The Left Navigation Menu can also be configured here.
 - **Staff Signature** – Maintains a digital copy of the signature you created using your mouse.
- **Directory of Services** - A consolidated list of the left side-bar menu groups and functions including Services for Workforce Staff, Reports, Customer Relationship Management, Communications, Communication Templates, Schedules, Document Management, and Manage Visitors.

Services for Workforce Staff

- **Manage Individuals**
 - **Create an Individual** - Create an individual user account.
 - **Common Intake** – Create one application to collect data requirements for multiple federal programs simultaneously.

- **One Case Note to Multiple Individuals** - Create one case note to distribute to multiple individuals accounts.
- **Assist an Individual** - Assist an existing individual account.
- **TAA Eligible Worker Layoff List** – List of individuals approved to be served under an eligible TAA petition.
- **Upload Rapid Response Individuals** – Import offline registrations for Rapid Response participants.
- **Manage Outreach Pool** – Used by SNAP and Choices/TANF staff to manage recipient referrals, to set up and manage initial client appointments, and manage appointment rosters.
- **Manage Employers**
 - **Create an Employer** - Create an employer user account.
 - **Assist an Employer** - Assist an existing employer account.
 - **Employer Access Rights** - Modify the employer's access to the system through setting access rights.
 - **Employers Posting Jobs** - Review jobs from internal and external employers.
 - **Local Employer Sites** - Review company profiles from the Data Axle database.
 - **One Case Note to Multiple Employers** - Create one case note to distribute to multiple employer accounts.

- **Manage Resumes**

- **Create a Résumé** - Create a candidate résumé in the system.
- **Search for Résumés** - Search for candidate résumés within the system.
- **Match Resumes to Jobs** - Perform a search for jobs using criteria from a résumé.
- **Candidate Referrals** - Create a candidate referral based on job search.

- **Manage Job Orders**

- **Create an Internal Job** - Create or manage internal jobs.
- **Search for Internal Job** - Search for an existing internal job order.
- **Search for All Jobs** - Search for internal or external jobs.

- **Manage Labor Exchange**

- **Mass Job Referrals** - Create job referrals for individuals.
- **Mass Candidate Referrals** - Create candidate referrals for employers.
- **Enter Referral Results** - Enter job referral results.
- **Referrals Pending Review** - Manage pending referrals to suppressed jobs.

- **Job Candidate Follow-up** - Manage follow-up referrals.
- **Job Skill Sets** - Manage custom job skill sets.
- **External Job Options** - Manage criteria to control the display of external jobs in the system.
- **Manage Activities**
 - **Individual Services** - Manage service plan data for individuals.
 - **One Service to Multiple Individuals** - Create one service for distribution to multiple individuals.
 - **Employer Services** - Manage service plan data for employers.
 - **Event Rosters** - Manage the events roster for registered event participants.
 - **One Service to Multiple Employers** - Create one service for distribution to multiple Employers.
 - **Scheduled Services** - Displays a list of schedules and services for a specific date, office, and service.
 - **Events** - Create events, add participants, and manage the events calendar for system users.
- **Manage Providers** – Create and manage training and service provider accounts.
- **Manage Case Assignment** – Individual Case Assignment and Employer Case Assignment.

- **Manage Funds** – Individual Fund Tracking (IFT) module to track fundable services and manage the budgets that support them. **Not in use at this time.**
- **Manage WARN Notifications** – Functions to manage the Worker Adjustment and Retraining Notification (WARN) Act for workers laid off due to plant closings and mass layoffs.
 - **Create WARN Notice** – Create a new WARN notice, entering information received from the employer, and send the official notice to any of the appropriate parties.
 - **Search for Warn Notices** – Select this option to view existing WARN notifications in the system.
 - **Partially Completed WARN Notices** – Select this option to view a list of partially completed WARN notices.
 - **Create WARN Visit Record** – Create a record for a WARN planning or orientation visit. Search WARN information to populate information from an existing notification, or manually enter new visit details.
 - **Search for Visit Records** – View existing WARN visit records in the system, and add, edit, delete, or print visit records from this page.
- **Manage Surveys** - Access to preview, edit, and manage active surveys.
- **Manage Online Forms** - Allows staff to create and fill out forms on the individual's or employer's behalf.

Reports – This group offers multiple ways to access, generate and save standard and customized workforce reports. Not covered in this manual.

Customer Relationship Management (CRM) - Offers Employer Outreach Specialists and Business Services Representatives the tools and resources to actively manage employer recruitment efforts, convert potential business customers into Marketing Leads for the purpose of providing assistance to these businesses, and to track the profile details they manage on behalf of these potential recruiting employers.

- **Create a Marketing Lead** - Access and complete a mini-registration for a potential employer recruit.
- **Contacts List** - Displays all primary and secondary contacts from when Marketing Lead employers were created.
- **Marketing Leads** - Displays all primary contacts from when Marketing Lead employers were created.
- **Outreach Campaigns** - Manage outbound Outreach marketing campaigns.
- **Work Items** - For case management, this heading is not currently used.
- **Appointments** - Create or view a list of existing appointments.
- **Online Surveys** - Create new survey forms and display all current forms (surveys) created within the CRM module.

Communications - Tools used for communicating with individuals and/or employers:

- **Messages** - Manage messages sent or received with your login.
- **Correspondence** - List letters you saved in the system.
- **Alerts** - Manage staff alerts and text watches on behalf of your customers.
- **Virtual Recruiter** - Set up and manage recurring job and résumé searches.
- **Email Log** - View emails you sent or received.

Communication Templates

- **Templates** – Templates.
- **Job Order Skill Sets** - Create or modify detailed skill sets to find candidates for job openings.
- **Job Order Templates** - Create and manage templates for job orders.
- **Case Note Templates** - Create and manage templates for case notes.
- **Search List** - Manage your saved search lists for individuals and employers.
- **Program Enrollment Templates** – Select this option to manage program enrollment templates.

Schedules

- **Appointment Calendar** - Create and manage appointments.

- **Events Calendar** - View and create upcoming events, track attendees.
- **Event Roster** - Displays event information per office.
- **Staff Availability** - Create and manage staff schedule and availability.

Document Management

- **Search Documents** - Search for electronic documents stored in the system, which have been uploaded and attached to an individual's account portfolio.

Choices Client System Registration

Training Objectives

After completing this module, you will be able to:

- successfully navigate to **Manage Individuals > Create an Individual**, when tasked with assisting individuals with system registration.
- understand what it means to be a **registered individual**.
- recognize questions that are required versus optional.
- understand questions defined as conditional that may require additional questions to be completed based on participant answers.
- successfully complete registration for the individual.

Before a Choices program applicant can receive program services in the WIT system, they must have an account profile. To meet this requirement, staff training participants will manually create a sample individual account by performing the steps that follow.

Note: This process will be followed for any TANF customer who has not cleared HHSC certification and is treated like a walk in. The process covered in training will match a walk-in scenario since the interface does not exist in the training environment.

For a customer being served through the Outreach Process, Client System Registration is handled by the system and will already be complete by the time a Staff Member begins assisting the individual.

Note: Fields marked with a red asterisk (*) are required.

To create an individual account:

1. From the **Services for Workforce Staff** menu group in the left navigation menu, click **Manage Individuals** ▶ **Create an Individual**.
2. Complete the Login Information section to enter the individual's desired Username and password for system login purposes. Re-enter the password again for confirmation.
3. Choose a security question the individual desires and enter a response.

Login Information ?

* User Name:

Enter User Name (3 - 20 characters, and must include characters, letters or numbers. Allowable characters are + @ . _)

* Password: 👁

* Confirm Password: 👁

Last Changed: 10/25/2023 6:56:39 PM, Heather Stringer

* Security Question: ▼

* Security Question Response: 👁

Special characters are not allowed.

Login Information Section of Create Individual Account Process

4. In the Name section, enter the individual's first and last name.

Name

* First Name:

Middle Initial:

* Last Name:

Name Section of Create Individual Account Process

5. In the Social Security Number section, enter the individual's unique nine-digit number and re-enter it. If the individual fails to provide their Social Security Number (SSN), select the checkbox.

Social Security Number

I do not wish to provide my Social Security Number

Do not enter dashes (for example, 999001111)

Social Security Number (SSN):

Re-enter Social Security Number:

Social Security Number Section

Note: If you select this checkbox, the system will create a pseudo-SSN for the individual, which might limit the scope of program services they can receive.

6. In the Phone Number section, enter the individual's primary phone number.
7. In the E-mail Address section, enter the individual's primary email address and re-enter it in the Confirmation text box.

E-mail Address

* Primary E-mail:

[Create E-mail Account](#) ↗

[Read Our E-mail Security Policy](#) ↗

* Confirm Primary E-mail Address:

Email Address Section of Create Individual Account Process.

8. In the Primary Location Information section, select the individual's country of residence and select whether they are authorized to work in the U.S.

Primary Location Information

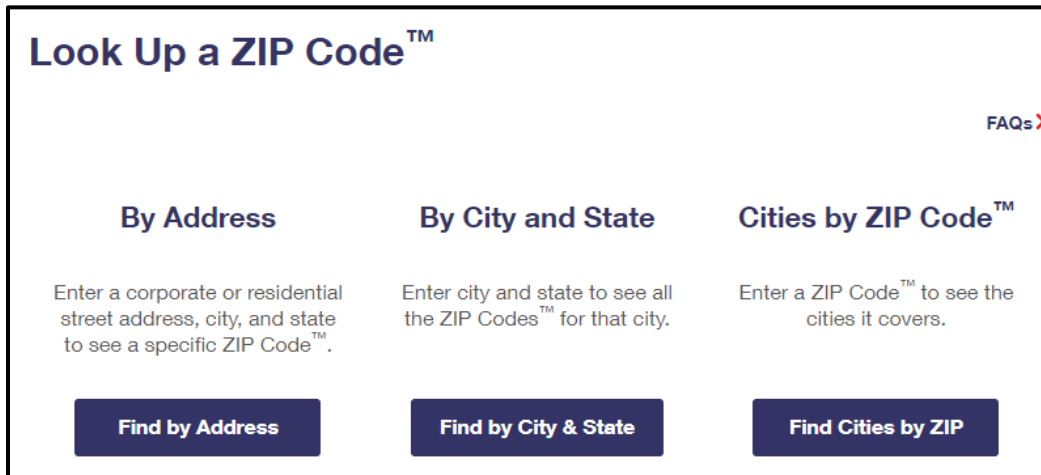
* Country:

* Are you authorized to work in the United States? Yes No

Primary Location Information Section of Create Individual Account Process

9. In the Residential Address section, select whether the individual is homeless and enter their address details accordingly. If the individual's mailing address differs, select the Mailing address is different checkbox to indicate this, and enter the individual's mailing address in the fields displayed.

Note: If unsure of the individual's ZIP Code, select the Find zip code link to access a search screen from the U.S. Postal service, as shown in the figure that follows.



USPS Zip Code Look Up Webpage

10. In the Demographic Information section, enter the individual's date of birth and select their gender. (Optional) Select their Foster Care status.

Demographic Information ?

* Date of Birth:

(MM/DD/YYYY)
You indicated your date of birth as February 7, 1996.

Age:

* Gender:
 Female
 Male
 I do not wish to answer.

I am currently in Foster Care or I have aged out of Foster Care System
 Yes, Currently in Foster Care
 Yes, I have aged out of the Foster Care System
 No

Demographic Information Section

Note: When you click outside of the Date of Birth field, the system will calculate the person's age.

11. In the Citizenship section, indicate the individual's citizenship status.
12. In the Disability section, make a selection to indicate whether the individual has a disability.
13. In the Education Information section, select the individual's highest education achievement level and their current school status.

Education Information	
* Your Highest Education Level Achieved:	High School Diploma
* Are you attending school?	No, Not Attending Any School

Education Information Section of Create Individual Account Process

14. In the Spouse or Caregiver of a Military Member section, provide responses for the questions displayed.

Spouse or Caregiver of a U.S. Military Member
Spouse or family caregiver of a Military member or Veteran may be entitled to State and Federal benefits. Please answer the following questions.
* Are you the Spouse or Caregiver of an active U.S. Military member or a Veteran? <input checked="" type="radio"/> Yes <input type="radio"/> No
Military Service
Veterans may be entitled to additional State and Federal benefits. Please answer the following questions.
* Are you currently in the U.S. Military or a Veteran? <input type="radio"/> Yes <input type="radio"/> No

Spouse or Caregiver of a Military Member Section

Note: Selecting Yes will trigger the display of additional information and/or questions.

15. In the Military Services section, provide responses to each question.

Note: A Yes response will trigger the display of additional information you must complete, as shown in the sample figure that follows.

Military Service

Veterans may be entitled to additional State and Federal benefits. Please answer the following questions.

* Are you currently in the U.S. Military or a Veteran?

Yes
 No

* Are you a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit?

Yes
 No

* Have you attended a Transition Assistance Program (TAP) Workshop within the last three years?

Yes
 No

* Are you within 24 months of retirement or 12 months of discharge from the military (Transitioning Service Member)?

Yes
 No

Veteran Information Screen of Create New Individual Process

16. In the Job Title section, enter the individuals preferred job title. As you type, suggested matches will display, from which you should select a title. Example - Quality Control Inspector or Cashier.

Job Title

Please enter a job title below. As you are entering the job title, you may see a list of common entering. If you see your job title in the list, select it.

* Job Title

Quality Control Inspector

Quality Control Inspector

Quality Control Inspector (QC Inspector)

Job Title Section of Create Individual Account Process

Note: If the system recognizes the job title you entered, it will display suggested occupations for selection from the O*NET database. If the system cannot recognize the job title you entered, select the Search for an occupation link to select the best matching occupation code. As a result, the system will display in bold text the matching occupation title and code.

Job Occupation

Please select the occupation that best matches your job title. You may either select from the which is populated based on the job title above, or you can search for an occupation using

Suggested occupation(s):

[Search for an occupation]

* Occupation Title: Inspec

* Occupation Code: 51906

Inspectors, Testers, Sorters, Samplers, and Weighers

None Selected

Aviation Inspectors

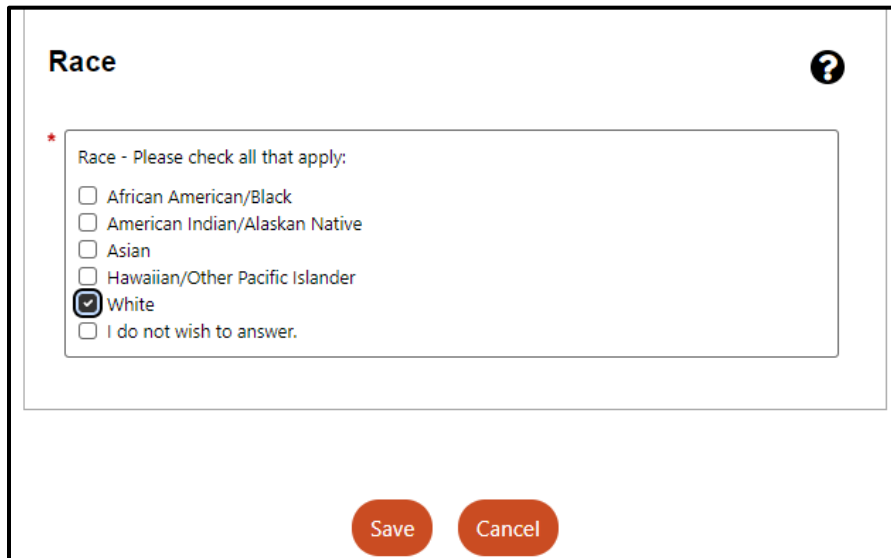
Food Scientists and Technologists

Transportation Inspectors

Job Occupation Section of Create Individual Account Process

17. In the Suggested occupation(s) dropdown menu, select an occupation that is appropriate for the individual.
18. In the Ethnic Origin section, select whether the individual is of Hispanic or Latino heritage.

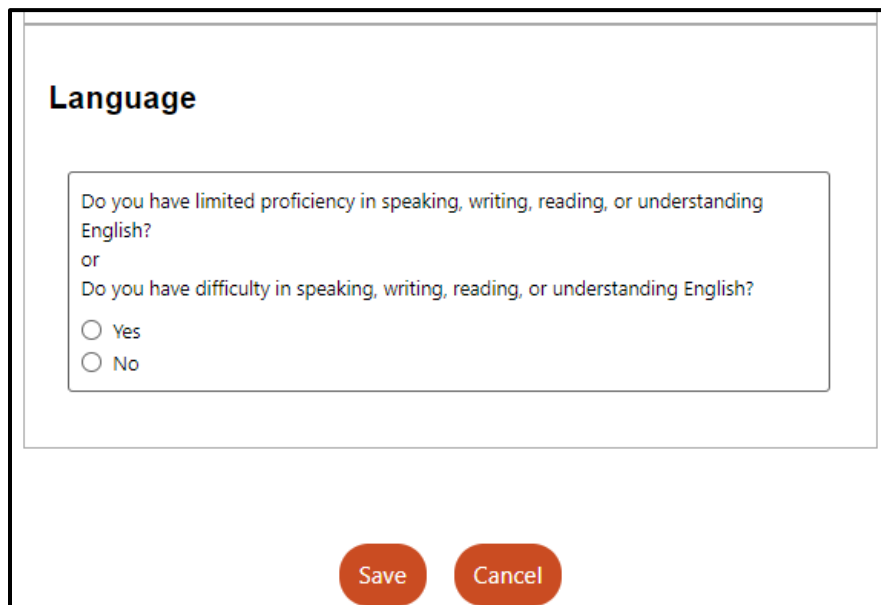
19. In the Race section, select all races that apply. Click **Save**.



The screenshot shows a form titled "Race" with a question mark icon in the top right corner. Below the title is a red asterisk and the text "Race - Please check all that apply:". There is a list of radio button options: "African American/Black", "American Indian/Alaskan Native", "Asian", "Hawaiian/Other Pacific Islander", "White" (which is selected with a checked box), and "I do not wish to answer.". At the bottom of the form are two orange buttons labeled "Save" and "Cancel".

Race Section of Create Individual Account Process

20. In the Language section, indicate whether the individual has difficulty or limited proficiency with English.



The screenshot shows a form titled "Language". The main question is "Do you have limited proficiency in speaking, writing, reading, or understanding English?" followed by "or" and "Do you have difficulty in speaking, writing, reading, or understanding English?". There are two radio button options: "Yes" and "No". At the bottom of the form are two orange buttons labeled "Save" and "Cancel".

Language Section of Create Individual Account Process

21. A Registration Confirmation page displays (see figure below).

What's Next?



[Add information to better match job requirements](#)

Employment and education history are sometimes required in the application process and are used as indicators when comparing jobs with applicants. By completing a few more prompts, you can see how well you qualify for the jobs you have found and employers will compare you favorably against other applicants.



[Create a résumé](#)

Some jobs in our system require the applicant to apply with a résumé. This option will help you create that résumé and add the employment history and education. Employers can also search for résumés on our system, so completing a resume will help employers find you.



[Apply for Career Services and Training](#)

Federal and state grants are available for qualified applicants to obtain career services and training or get priority assistance. Completing the full registration will help staff identify if you qualify for any of these grants.



[Additional Veteran Services](#)

Additional services may be available to you if you are a qualified veteran. We will require you to answer a few more detailed veteran questions.

Sample Registration Confirmation Page


Staff Assisting Individuals

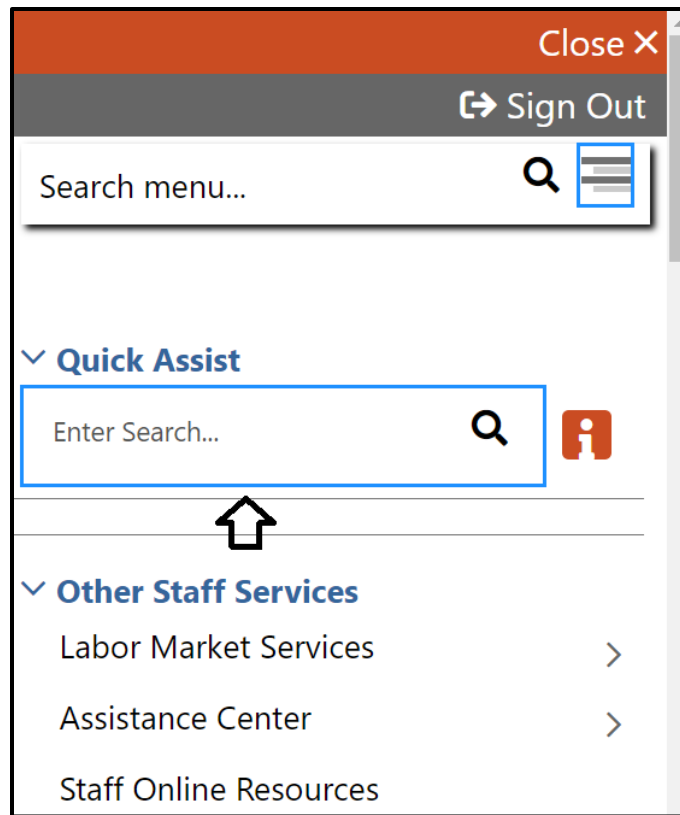
Searching for an Individual and Assisting

Note: The information that follows supports information presented in the System Overview training video.

Once an individual has completed system registration, staff can perform a search for their account and provide assistance using any of the following search methods:

- **Quick Assist** - The Quick Assist is a convenient way to search for an individual or employer and is located at the top of the left side-bar menu and is based on the last four digits of an individual's SSN, last name, an employer's company name or Federal Employer Identification Number (FEIN), or other criteria.

Note: The full range of criteria used in the search can be identified by clicking the  Help icon at the right of the search entry field, as shown in the figure that follows.



Quick Search Menu / Help Icon

- **General Search** – To perform a general search for an individual:
 - On the left navigation menu under the Services for Workforce Staff section, select **Manage Individuals** > **Assist an Individual**.
 - A search window is displayed allowing you to specify information about the individual you want to assist.
 - Select a desired name from the **Quick Assist** drop-down box to quickly access one of the last five accounts you previously accessed or enter criteria to find a desired individual in the **General Criteria** section (see figure below).

Quick Assist

You have 1 saved Individual item(s) in [My Search Lists](#).

Here are the 5 most recent individuals you assisted: Smith, John (Jsmith123@) [Assist](#)

[\[Top | Search | Bottom \]](#)

General Criteria

Individual Username:

Individual User ID:

Starts with these #s
 Matches exactly

State ID Number:

First Name:

Last Name:

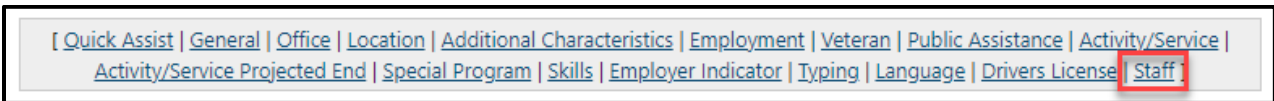
SSN (last 4 digits):

SSN (full number): Example: 999999999

Date of Birth: (MM/DD/YYYY)

Search General Criteria

- More Search Options** – The **More Search Options** link near the bottom of the page will launch a link menu at the top of the page with additional search options. An example – to conduct a general customer search based on program participation, click the Staff jump link (see figure below).



Criteria Options for Performing a Job Seeker Search

If you select a desired program, the system will refresh or redraw the screen to display related customer program groups to filter your selection (see figure below).

Case Management Criteria

Assigned Case Manager: [\[Select Me \]](#)

Program Participation
(Active only):

Customer Program Group:

Grant Code:

Provider:

Registration Source:

WTP Referrals:

Adult
Youth
Dislocated Worker
Statewide Youth
Incumbent Worker - Adult
Statewide Adult
Statewide Rapid Response Add'l Assistance DW
Statewide Dislocated Worker
National Dislocated Worker Grant (NDWG)
Local Funded Grant
None Selected

Case Management Criteria Search Option

- Click **Search** link at the bottom of any section or click the **Search** button at the bottom of the page.
- Sort on any column header to reorganize results.
- Click **Modify current criteria** at the bottom of the page to add or remove criteria to change results.
- When you locate your Individual, click on the **Username** (see figure below).

Results View: [Summary](#) | [Detailed](#)
 To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Action	Select
chrisbreezy@	Chris	Brown	0020	No	88			05/06/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>
GSISSOJBROWN	Jane	Brown	6666		12			04/09/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>

[Save New List](#)

2 Records found

SEARCH CRITERIA: Last name begins with brown

Search Results and Actions

Search Result Actions

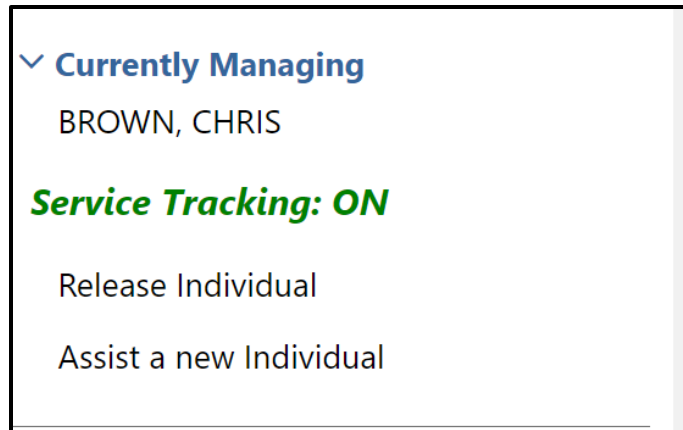
- **Summary Tab** - Case summary of services.
- **Case Notes Tab** - Case Notes for the individual.
- **Activities Tab** - Activities for the individual.
- **Programs Tab** - Wagner-Peyser program details.

Note: Using the My Staff Account feature, staff may customize the hyperlink display under the Actions column.

Currently Managing

When assisting an individual or employer, **Currently Managing** displays on the left side-bar menu with their name and links to the folders, profiles, and specific functions (see figure below). Currently Managing also displays at the top of the page.

Note: A flag and/or (MSFW) will also display next to the name if the individual is a veteran or a Migrant Seasonal Farm Worker.



Currently Managing

- **Service Tracking: ON** (indicator) - Refers to the tracking and recording of some services and activities automatically without the need for staff to enter them manually. The **automatic service tracking** design helps staff focus more attention on their customers' needs.
- **Release Individual** - When finished working with an individual, select **Release Individual** from the **Currently Managing** menu group (see figure above)
- **Assist a new Individual** – Assist another registered individual.

Individual Portfolio Folders

Individual Portfolio Folders are quick links to an individual's profiles and plans and are located at the top of the page when assisting an individual (see figure below).



Individual Profile Folders

To view or modify the information in the individual’s profiles and plans, click the name of the individual currently being assisted, under **Currently Managing** on the left side-bar menu.

My Individual Profiles

My Individual Profiles stores all the individual’s personal information, keeps track of all searches they performed in the system, provides access to self-assessment tools, and lets them communicate with employers or others regarding their career interests (see figure above).

Folders include:

- **Personal Profile**

- **General Information** - Contact and profile information about the individual as recorded during system registration.
- **Background** - Information that can be used in a résumé or application.
- **Activities** - Self-evaluations and other assessments.
- **Paths** - Individuals collect **badges** as they complete tasks that are designed to help them maximize the system's features, such as creating résumés and completing assessments.
- **Memo** - Blank memo text box where an individual can maintain reminder messages to themselves.
- **Documents** - A list of the individual's documents that have been uploaded to the system.

- **Search History Profile**

- **Jobs** - Searches the individual made of viewed jobs.
- **Employers** - Searches the individual made of viewed employers.
- **Programs** - Lists training programs in which the individual has participated.
- **Scholarships** - Lists any scholarships the individual previously viewed and lets users conduct new scholarship searches.

- **Occupations** - Searches for specific occupations.
- **Industries** - Searches for a specific industry.
- **Areas** - Displays a list of areas previously viewed.

- **Self-Assessment Profile**

Use the individuals listed skills to search for occupations and jobs in the system that require those skills by clicking the **Find Matching Occupations and Jobs** button in each of the following sections:

- **Job Skills** - Displays the job skills selected during registration.
- **Personal skills** - Displays the personal skills selected during registration.
- **Work Interests** - Displays the scores for the Work Interests and Work Interest Analyzer assessments, if taken.
- **Work Values** - Displays the scores for the Work Values and Work Values Analyzer assessments, if taken.
- **Tools and Technologies** - Shows the typical tools and technology tools saved to the system, if any.
- **Multiple** – Allows selection of multiple types of self-assessments and combines them to produce a list of occupations that match the selected skills during registration.

- **Communications Profile** - Contains tools to access and manage communications. Tools include:
 - **Messages** – Collects and stores system messages received, sent, saved, or removed.
 - **Correspondence** - Lists information about the letters and correspondence created in the system.
 - **Communication Templates** – Contains default templates, such as a cover letter for job seekers who are applying for jobs, or a rejection letter for employers who are reviewing job applicants. Also allows creation of new templates.
 - **Subscriptions** - Displays System Alert messages received in your Message Center through your e-mail address or as a text message. System alerts are helpful messages and reminders that the system sends to users who have configured and requested alerts.
 - **Email log** - Contains a list of email messages from the WIT system that have been sent or received. Use the drop-down list to filter between sent and received messages.

My Individual Plans

These following folders quickly display an individual's employment, training, benefits for which they may be eligible, and financial plan profiles.

- **Employment Plan Profile**

- **Résumés** - Select to display all résumés that the individual has created in the system.
- **Job Contacts** - Displays job contacts you've entered in the system.
- **Online Application Form** - Select to display a brief summary of saved background history used for pre-populating the system application when applying for jobs.
- **State Application Templates** - Select to display a list of created State of Texas Applications. Allows for creating a new template or application.
- **Virtual Recruiters** - Select to display the virtual recruiter job alerts set up in the system. Allows for creating new alerts.
- **Employment Strategy** - Select to access a powerful tool and strategy to quickly find a new job nearby that matches the individual's background.
- **Employment Goals** - Select to develop an Individual Employment Plan (IEP) and/or Service Strategy.
- **Training Plan Profile** - Displays information about classroom or online training in which an individual has participated.

Folders include:

- **Classroom Training** - Displays information about training activities that the individual has undertaken, typically through state or federal benefit programs, and

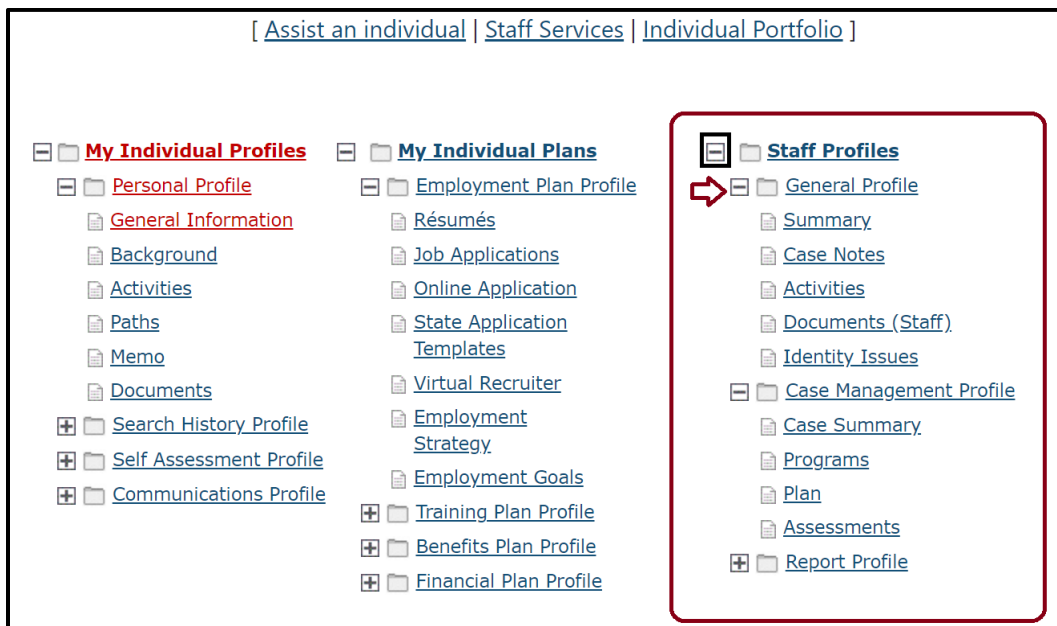
- allows the user to search for training providers or programs.
- **Online Training** - Displays the online training courses that the individual has taken or are currently working on.
- **Benefits Plan Profile** - Access basic information on government benefits for which the individual may be entitled. Folders include:
 - **Workforce Innovation and Opportunity Act (WIOA)** – Provides an overview of the WIOA Adult and Dislocated Worker programs, as well as the WIOA Youth program.
 - **Trade Adjustment Assistance (TAA)** – Provides an overview of the TAA program with links to additional information.
 - **Other Benefits** - Includes a list of resources to local, state, and federal benefits for unemployment claimants, veterans, youth, and seniors.
- **Financial Plan Profile** - Provides tools for individuals to create overall budgets, training budgets, and transition budgets. Folders include:
 - **Financial Literacy** - List of resources to manage personal funds.
 - **Overall Budget** - Tools to create a budget for income and expenses.

- **Training Budget** - Tools to create a budget for training and a list of training resources.
- **Transition Budget** - Tools to create a transition budget that allows individuals to analyze expenses and income for a selected time period and create a plan for a job transition.

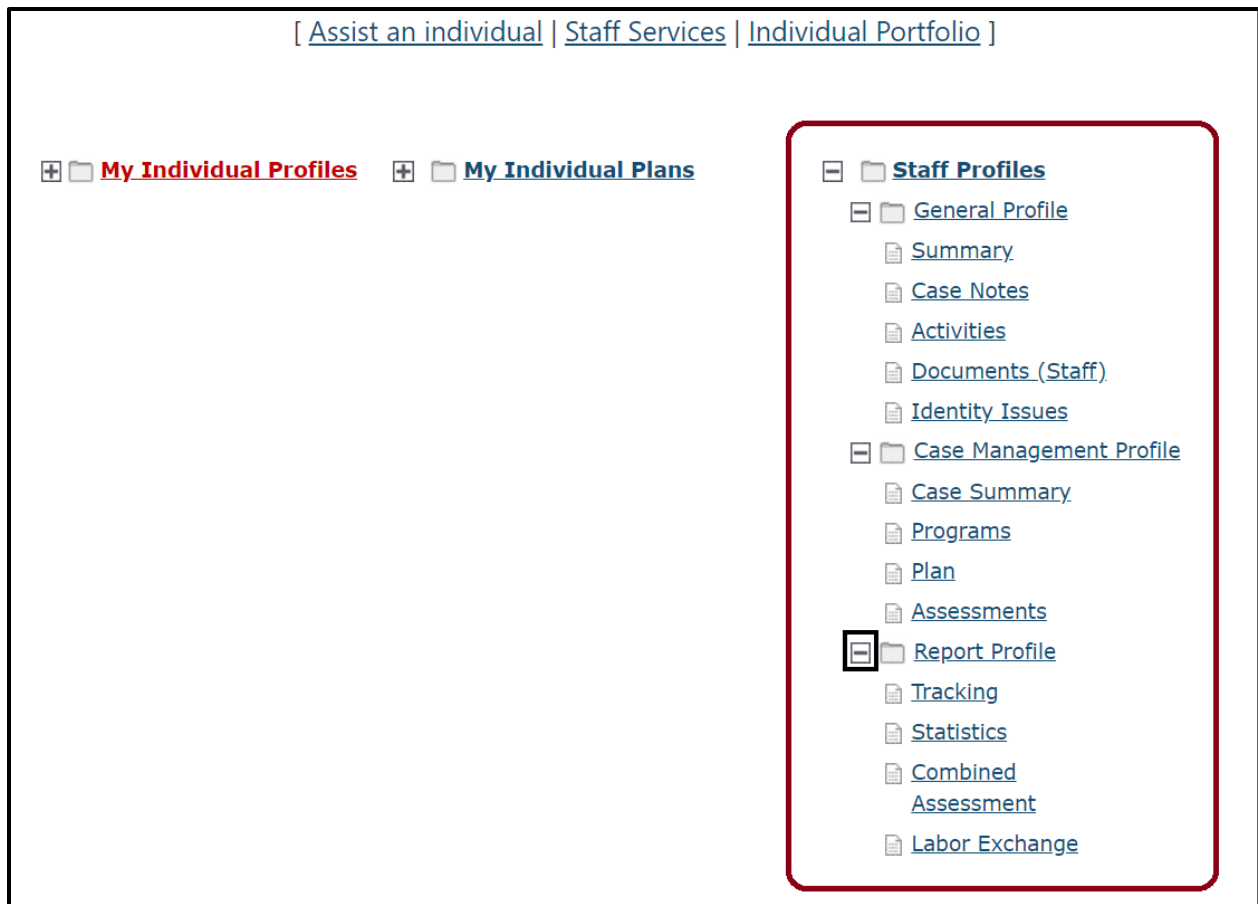
Staff Profile Folders

When you are Currently Managing an individual or an employer, the **Staff Profiles** menu will display staff-specific folders.

Note: Only staff members can view this profile menu. (see figure below).



Staff Profile Folders



Staff Profiles When Assisting an Individual

Staff profiles consist of the following folders (see figure above):

- **General Profile** - Enables staff to review summary information on an individual, create case notes, or conduct Wagner-Peyser services.
 - **Summary** - Select to view general information about the individual through several summary panels and review an individual's background.
 - **Case Notes** - Select to create case notes pertaining to the individual in a central location no matter where they are created.

- **Activities** - Select to review an individual's involvement in the Wagner-Peyser program.
- **Documents (Staff)** - Select to interactively upload/import or scan documents into the system. Staff can attach an electronic document to a client's record.
- **Case Management Profile** - Enables staff to manage services for various federal programs, create an Individual Employment Plan (IEP), and maintain recorded assessments. Folders include:
 - **Case Summary** - Select to display information about the individual through several summary panels. Allows staff to review an individual's background.
 - **Programs** - Select to display details of an individual's involvement in the Choices program. Allows staff to create and manage applications and enrollments for the individual in various programs.
 - **Plan** - Select to display a customer's career goals, skills assessments, and an IEP. This information provides a comprehensive plan or needs analysis that helps direct the types and number of program services provided to the individual.
 - **Assessments** - Select to create and manage assessments that can only be entered by staff (such as Basic Skills Assessments - TABE Test and WorkKeys® tests).
- **Report Profile** - Allows staff to review an individual's tasks, system access, and assessments. Folders include:

- **Tracking** - Select to review when an individual has accessed specific system components.
- **Statistics** - Select to monitor an individual's site usage. Contains links to specific created items such as résumés and/or the Virtual Recruiter.
- **Combined Assessment** - Allows staff to view and print assessments, both self-assessment and case management-related, all on one screen.
- **Labor Exchange** - Maintains a list of dates and times employers viewed individual's résumés and provides access to employer and résumés details.

Choices Outreach Pool

Training Objectives

After completing this module, you will be able to:

- Assist the Individual.
- Navigate to the Outreach Pool area.
- Understand the role of the Choices outreach pool.
- Identify where Outreach Rosters are managed, and by whom.
- Create and manage Outreach Appointments.

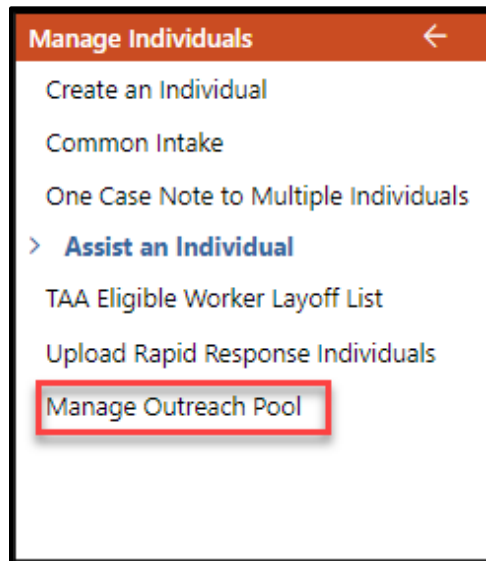
In order for an individual to receive Choices program services, they must first be approved by HHSC and added to the Choices Outreach Pool. The referral process for TANF applicants and Choices eligible TANF recipients to TWC remains the same with the new WIT implementation. Once HHSC has determined that a TANF applicant is eligible to receive Choices services, customer data will be sent to WIT overnight via an interface file, creating the client registration if the individual was not already present in the WIT system, and creating an incomplete Choices application.

Accessing the Outreach Pool

Access to the Outreach pool is provided through the Left Navigation Menu. Select **Manage Individuals** Menu, then select **Manage Outreach Pool**.

1. If your menu is hidden by default, select the menu button or the hamburger icon to access the Left Navigation Menu.

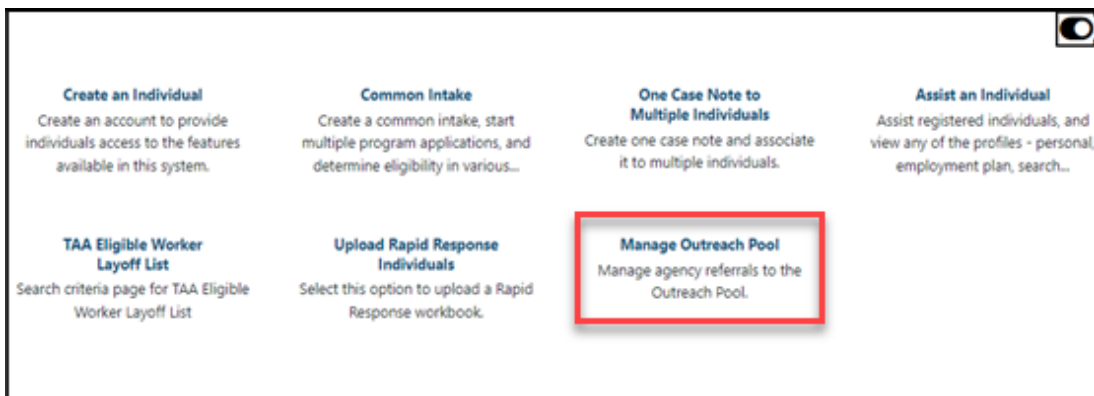
2. Under Services for Workforce Staff, click on the arrow to the right of Manage Individuals.
3. From the Manage Individuals flyout, open Assist an Individual, select the **Manage Outreach Pool** hyperlink (pictured below).



Manage Individuals flyout

Manage Individuals Menu Screen

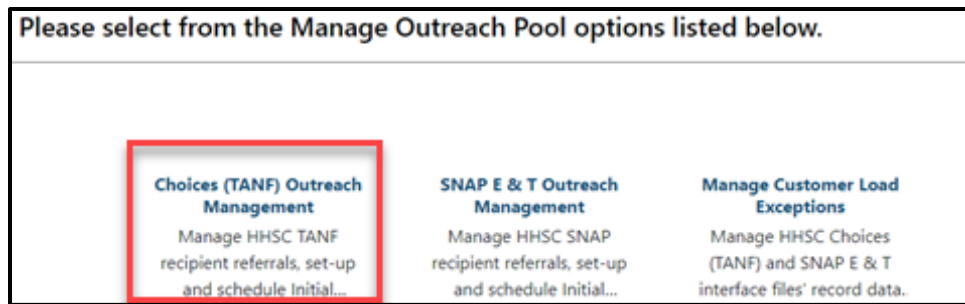
1. If your menu is hidden by default, select the menu button or the hamburger icon to access the Left Navigation Menu.
2. Under Services for Workforce Staff, click directly on the **Manage Individuals** hyperlink.
3. From the Manage Individuals Menu Screen, select the **Manage Outreach Pool** hyperlink (pictured below).



Manage Individual Menu Screen

Managing the Outreach Process

Options visible to staff members will vary based on user privileges. Since both SNAP E&T and Choices Outreach Pools are managed within the Manage Outreach Pool Menu, staff users will need to make the appropriate selection for their program. By selecting the **Choices (TANF) Outreach Management** hyperlink, staff will access the records specific to Choices applicants referred by HHSC (see image below).

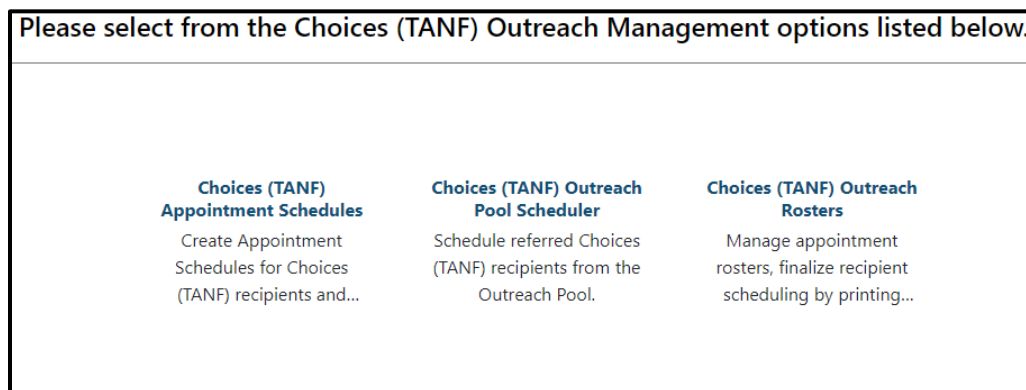


Outreach Pool Options

Choices (TANF) Outreach Management Options

Once staff members select the **Choices (TANF) Outreach Management** link, three primary outreach pool options will display (pictured below). The options include the following:

- **Choices (TANF) Appointment Schedules** – Create, modify, and edit initial appointments.
- **Choices (TANF) Outreach Pool Scheduler** – Schedule recipients from the Outreach Pool.
- **Choices (TANF) Outreach Rosters** – Manage appointment rosters, finalize recipient scheduling by printing invitation letter, and manage attendance to track cooperation and non-cooperation.



Choices Outreach Pool Options

Choices (TANF) Appointment Schedules Overview

The Choices (TANF) Appointment Schedules option will allow staff members to manage appointment options for Choices applicants and participants. From the Appointment Schedules screen, staff members can do the following:

- Create (Add) appointment sessions for initial appointments.
- Edit/Modify existing appointments.
- Delete appointments.
- Search Outreach Pool for individuals to schedule.

The list of Appointment Schedule records below may be edited, or you may search the outreach pool referrals for scheduling into Initial Appointments.

There is default filter criterion set, and this may be updated to get different results. Click on the action column links to work with an Appointment Schedule record.

Show Filter Criteria

Available Appointment Schedules for Choices (WTP) Outreach – Initial Appointment										
ID	LWDB, Office Location	Start Date, Time	End Date, Time	Hours	# of Pool Records	Scheduled	Capacity (Avail)	Location	Staff to Contact	Action
11	03 - North Texas WF Board, 771 WF SOL N TX Wichita Falls	06/29/2023, 12:00 AM	07/06/2023, 12:00 AM	1:00	0	0	No Limit ()	667 WF SOL Panhandle	Valerie John	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule

Add a New Schedule Cancel

Return to Dashboard

Choices Outreach Pool Appointment Scheduling Window

Adding a new Scheduled Appointment

TWC staff will continue the practice of creating **Office Schedules** in the form of Appointment Schedules in WIT. These records will hold details about the appointment, reserve time on staff calendars for scheduled dates and times, and to which scheduled recipients will be added onto rosters. This is part of the management of the 7-day response requirement for mandatory recipients.

1. From the Appointment Schedules Screen, click the **Add a New Schedule** button to create a new event. The Choices Program Appointment Schedule Record Screen displays (pictured below).
2. Appointment Schedule Record Entry Screen with required fields marked with red asterisks.

Choices Program

*** LWDB/Region:**


*** Office Location:**


Program: Choices Program


Appointment Type: 1 - Choices Outreach for Initial Appointment

*** Appointment Subject:**

Capacity:

*** Appointment Date:**  Today

*** Appointment Start Time:** (hh:mm am/pm) 

*** Appointment End Time:** (hh:mm am/pm) 

*** Hours:** [Format \(0:00\)](#)

*** Staff to Contact:**

Contact Staff Phone: - - **Ext:**

*** Location Name:**

*** Location Address:**

Location Address 2:

*** Location Zip Code:**

*** Location City:**

Created by:

Create Date: 12:00:00 AM

Edited by:

Edit Date: 12:00:00 AM

Appointment Schedule Record Entry Screen

Starting with LWDB/Region and Office location, enter the required information for the event.

3. Enter the appropriate appointment subject.
4. Enter the appointment date and start time.
5. Enter the end time.
6. Verify the number of hours.
7. Enter a contact name, selecting from the presented options.
8. Enter a location name, selecting from the presented options.
9. Once the necessary information is entered and all required fields are addressed, click the save button to create the appointment.

The page will automatically refresh and return the staff member to the Appointment Schedule Screen. Any existing appointments within the next 14 calendar days will display in the table (pictured below).

Available Appointment Schedules for Choices Outreach – Initial Appointment										
ID	LWDB, Office Location	Start Date, Time	End Date, Time	Hours	# of Pool Records	Scheduled	Capacity (Avail)	Location	Staff to Contact	Action
14	01 - Panhandle WF Board, 123 WF SOL Capital Area East	07/26/2023, 4:00 PM	07/26/2023, 5:00 PM	1:00	0	0	No Limit 0	854668 location		Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule
15	03 - North Texas WF Board, 771 WF SOL N TX Wichita Falls	07/24/2023, 8:00 AM	07/24/2023, 9:00 AM	1:00	0	0	No Limit 0	847529 Alameda	Michael Green	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule
17	01 - Panhandle WF Board, 6490 Central Texas Tele-center	07/26/2023, 8:00 AM	07/26/2023, 9:00 AM	1:00	0	0	10 (10)	North	Dani Richardson	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule

Appointment Schedule Screen

Filtering Scheduled Appointments

The default Appointment Schedule view will display all currently scheduled appointments for today plus 14 days. If staff members want to modify the information displayed, they can filter the results.

1. Select the **Show Filter Criteria** link. The page will expand to show all filter options.
2. Modify the desired filters, paying close attention to the fields marked as required by a red asterisk.

[Hide Filter Criteria](#)

*** LWDB/Region:**

Office Location:

*** Program:** Choices Program

*** Appointment Type:** 1 - Choices Outreach for Initial Appointment

*** Pool Management Type:** 1 - Scheduling

Capacity: Override Appointment Schedule Capacity Limit

Date From: [Today](#)

Date To: [Today](#)

Staff to Contact:

SSN:

Work Code:

[[Apply Filters](#) | [Reset Filters](#)]

Appointment Schedule Filters

3. Once all filters are entered/selected, click the **Apply Filters** link.
4. The table will refresh, showing results based on the filter criteria selected.

Search and Select Individuals within the Outreach Pool

Staff are responsible for scheduling applicants into appropriate appointments. The available applicants are entered into the Outreach Pool via interface. The records come directly from HHSC.

The system will execute a preliminary search of the Choices outreach pool using the selected Appointment Schedule record, matching the LWDB/Region in the schedule record to recipients assigned office LWDB/Region set during Interface processing (recipients may be scheduled into any office appointment schedule associated to the LWDB/Region).

SSN	Client Name Client Number EDG Num	Contact HHSC Mailing/Phone	Type Program	Work Code	Choices Appld/Status	Choices Closed Status	WP App Status	Last Action	Action ■ Select All
XXX-XX-7777	Jones, Claudia 100212346 411212346	3122222222	01	T - Pregnant and unable to work	10635 - Incomplete		WP RI Only	Pending Roster	<input type="checkbox"/>
XXX-XX-7778	Wong, Patricia 100212348 411212348	8200 S Congress Ave AUSTIN, TX 78745 3242222222	01	M - Mandatory	10596 - Incomplete		WP RI Only	Pending Roster	<input type="checkbox"/>
XXX-XX-2222	Garcia, Jose 100212395 411212395	311 Bowie St AUSTIN, TX 78703 5127981512	61	M - Mandatory	10612 - Incomplete		WP RI Only	Pending Roster	<input type="checkbox"/>

Outreach Pool Roster Selection

To schedule an individual from the Outreach Pool

1. From the Appointment Schedule Table, select the **Search Outreach Pool** hyperlink from the Action column.
2. The Customer Selection Preview list appears as a table. The most recent records will display first, based on the filter criteria selected. No action has been taken at this time.

Note: The users queried by this search are placed in a temporary table within the system, preventing other staff users from scheduling the individual.

3. To widen or modify the search criteria used to create this list, access the **Show Filter Criteria** hyperlink. The page will expand to show additional filter options.
4. To widen your search and pool more participants into the roster, or to narrow your search to specific categories of individuals, make selections for the office location option and the Work Code options.
5. For the widest possible search, change both categories above to **None Selected**.
6. Using the check box under the Action column to select individual users, select all appropriate individuals to include in the selected appointment. Follow all TWC policies on selection and location assignment.
7. Select the **Add to List** hyperlink to prepare records to roster assignment.
8. The Last Action column provides staff members with information about the current state of the individual.
 - i. **Pending** means the record has been loaded into the temporary table, but no actions have been taken.
 - ii. **Pending Roster** means that the individual has been selected for addition to a roster.

- iii. **Pending Letter** means that the individual has officially been saved to the appointment and the system is awaiting notification from the staff user that the required communication and compliance letter has been printed.
9. To save the selected individuals to the currently selected appointment, check the action box for all applicants and click the **Save to Roster** button.
10. To return all unselected recipients back to the pool and return to the Appointment Schedules Screen, click the **Return to Schedules** button.

Note: When an enrollee is added to the Roster for a scheduled Choices orientation, the system creates a partial Choices application, and the Choices application will display an **Incomplete** status. Staff may complete the partial application. The system also automatically creates a standard Case note for the orientation.

Printing Letters and Finalizing Scheduling

Once the appropriate appointments are selected for Outreach Pool individuals, program applicants must be notified via a printed letter.

Note: An individual’s attendance record cannot be finalized until a **Print Letter Date** exists within Roster Management.

To print the notification letter:

1. From the Choices (TANF) Outreach Management Page select the **Choices (TANF) Outreach Rosters** link. The Rosters List Landing Page will appear (pictured below).

Results View: [Summary](#) | [Detailed](#)
 To sort on any column, click a column title.

Roster ID	Start Date & Time	End Date & Time	Hours	LWDB_Office Location	#Sched	Capacity(Avail)	Location	Staff Contact	Action
116	12/14/2023 12:00:00 AM	12/14/2023 12:00:00 AM	1:00	14- 125 WF SOL Capital Area South	1	No Limit ()	Test Location 333 Test Dr. Austin, TX 78704		Manage Roster Print Roster
113	12/13/2023 12:00:00 AM	12/13/2023 12:00:00 AM	1:00	14- 125 WF SOL Capital Area South	1	No Limit ()	Test Location 56 Test Dr. Austin, TX 78704		Manage Roster Print Roster
127	12/28/2023 12:00:00 AM	12/28/2023 12:00:00 AM	1:00	14- 125 WF SOL Capital Area South	1	No Limit ()	Test Location 123 Test Drive Austin, TX 78704	Sandy Staff	Manage Roster Print Roster
121	12/15/2023 12:00:00 AM	12/15/2023 12:00:00 AM	1:00	14- 125 WF SOL Capital Area South	1	No Limit ()	Test Location 1234 Test Dr. Austin, TX 78704	Sandy Staff	Manage Roster Print Roster

4 Records Found

[Cancel](#)

Outreach Roster List Landing Page

2. Depending on the current configuration for default search options, filters may need to be adjusted.
3. Select the **Show Filter** hyperlink to expand the filter options.

4. To properly search for meetings with rosters, select the appropriate LWDB/Region. Once you have made changes to the filter, select the **Apply Filter** hyperlink.
5. From the results page, identify which appointment that needs updating and select the **Manage Roster** hyperlink. The Roster Page will display.

Schedule End Date and Time: 10/24/2023 03:00

Hours: 1:00

Staff to Contact: Brandon Martin

Location: Main Facility

Capacity (Current Available): 15(13)

Scheduled: 2

Pending Letters: 2

Set Attendance Status:

Search:

Results View: [Summary](#) | [Detailed](#)

To sort on any column, click a column title.

State ID	Customer Name Client Number	HHCS Mailing Address/Phone Number	Type Program	Work Code	Choices ApplID/Status	Choices ClosedStatus	WP App Status	Last Action	Record Last Updated	Action Select All
10860	Garcia Frank 5127981513	311 Bowie St AUSTIN, TX 78703 5127981513	61	1	10613-Incomplete		WP RI Only	Pending Letter	10/24/2023 John Marks	<input type="checkbox"/>
10846	Palin Sarah 3522222354	1198 San Bernard St AUSTIN, TX 78708 3522222354	61	1	10634-Incomplete		WP RI Only	Pending Letter	10/24/2023 John Marks	<input type="checkbox"/>

2 Records Found

[[Update Selected Records](#)] [[Remove From Roster List](#)] [[Print Roster](#)]

Roster Page

6. Select all individuals who need to have letters printed. You'll notice the **Print Letters** button turns red indicating that it is available as a selection.
7. Once all users are selected, click the **Print Letters** button. This action officially starts the clock for tracking and **commits** the appointment. The selected letters will move to the user's browser downloads folder for saving or printing.

Note: The print letter button also flags the individual user's profile to remove them from the Outreach Pool, preventing double scheduling.

Note: Staff may view and print the created Outreach letter from the customers documents folder.

Once the letter print date has generated and meetings have completed, staff members are able to enter attendance.

1. In the **Set Attendance Status** dropdown, select the status you are setting (Attended, Reschedule, Did Not Attend – Penalty, Did Not Attend).
2. From within the roster page, select all appropriate records for the Attendance Status you are attempting to set. (EX: If the entire group of individuals attended, choose Select All. If only certain individuals attended, select the appropriate records).
3. Once all users are selected and status is set, click the **Update Selected Records** hyperlink.
4. Repeat the process for all individuals who need attendance updated by first selecting the Set Attendance Type, then checking the action column for the individual(s) and selecting the **Update Selected Records** hyperlink.

Scheduled: 2

Pending Letters : 2

Set Attendance Status:

- None Selected
- Rescheduled
- Attended
- Did not attend - penalty
- Did not attend

Results View: **Summary** | [Details](#)

to sort on any column, click a column title.

Attendance Status Options

Rescheduling from Roster Management

If the participant needs to be rescheduled, select Rescheduled as the Attendance Status. This will start the process of moving the individual to a different meeting. With the individual selected chose the Update Roster hyperlink in the same way any other roster assignment is made.

Set Attendance Status:

Search:

Results View: [Summary](#) | [Detailed](#)
 To sort on any column, click a column title.

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Work Code	SNAP AppID/Status	SNAP Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
11303	Smith Fatima 100212358	110 San Antonio St Austin, TX 78701 351-666-6666	2	10269-Enrolled		WP RI Only	Scheduled (02/02/2024)	2/2/2024 Brandon Martin	<input checked="" type="checkbox"/>

Roster Management – Rescheduled Status

Once the reschedule process is initiated, the TX WIT system will present the Staff User with the Appointment Scheduling screen. This screen is identical to the appointment selection screen covered earlier in training. The only change is that the Action column displays a Reschedule – Add to Roster option. Simply select the appropriate meeting to reschedule the individual.

Staff can create a new meeting from this screen as well.

Available Appointment Schedules for SNAP Employment and Training Outreach – Initial Appointment										
ID	LWDB, Office Location	Start Date, Time	End Date, Time	Hours	# of Pool Records	Scheduled	Capacity (Avail)	Location	Staff to Contact	Action
128	14 - Capital Area WF Board, 129 WF SOL Capital Area North	02/02/2024, 12:00 PM	02/02/2024, 1:00 PM	1:00	1	1	15 (14)	Main Facility		Reschedule - Add to Roster
129	14 - Capital Area WF Board, 129 WF SOL Capital Area North	02/02/2024, 4:00 PM	02/02/2024, 5:00 PM	1:00	1	0	15 (15)	Main Office		Reschedule - Add to Roster

Page 1 of 1 Rows: 10

Appointment Selection Screen with Reschedule Option

The Staff User is returned to the initial roster page, with the individual now showing a Last Action status of Rescheduled.

Last Action	Record Last Updated	Action Select All
Rescheduled (114)	2/2/2024 Brandon Martin	<input type="checkbox"/>

Original Roster showing Rescheduled Status

On the Roster for the new appointment, the individual will show as Scheduled. From here attendance can be managed in the same way as previously covered.

<u>Last Action</u>	Record Last Updated	Action Select All <input type="checkbox"/>
Scheduled (02/02/2024)	2/2/2024 Brandon Martin	<input type="checkbox"/>

New Appointment Roster showing Scheduled Status

Outreach Pool Addendum

This addendum will cover a variety of topics that are adjacent to the Outreach Pool process. The content covered may or may not be applicable for every individual who moves through the Outreach Pool process.

Accessing Outreach Appointment Letters

If Staff need to access the Choices initial appointment letters outside of the normal Outreach process, this is done by accessing the Documents section of the General Profile under Staff Profiles with the customer being managed. From here the letter can be viewed and downloaded.

The screenshot displays the 'Staff Profiles' section of the application. Under the 'General Profile' for a staff member, the 'Documents (Staff)' tab is selected and highlighted in orange. Below the navigation tabs, the 'Documents Available' section is visible. It includes a list of documents with the following table:

Document Name	Document Tags	Program Name	Category	Modify Date	Expiration Date	Action
SNAP_InitialAppt_Letter	SNAP	SNAP Employment and Training	General	11/17/2023 03:53		View Review Edit Download Meta Data Delete

Initial Outreach Appointment Letter

Automatic Calendar Inserts

When the letter is printed during the Outreach process, a Calendar Appointment is automatically created in the participants VOS calendar. This is first visible in the messages section of their individual dashboard. By accessing the calendar, the individual will see the appointment listed on the appropriate date. Clicking on the hyperlink within the calendar will show the official details, including the specific timeframe for the meeting.

This process is identical for SNAP and Choices.

A similar calendar item is also inserted for the Staff Member assigned during the Appointment Creation.

Note: The only difference between staff and individual calendar inserts is that the entire roster will be listed in the Attendees List section for Staff.

The screenshot displays the 'Current User Statistics' dashboard. At the top, it lists various activity metrics: Reviewed (0 occupation(s), 0 education program(s), 0 employer(s), and 0 job(s)), Created (0 résumé(s) viewed by 0 employer(s), 0 letter(s), and 0 saved job alert(s)), Messages (0 new message(s) and 1 new appointment(s)), Classroom Training (0 TAA course(s) and 0 Generic course(s)), Online Training (Enroll in ALISON), Virtual Recruiter (0 active virtual recruiters, Search has not been run), Registration Date (9/12/2023), Last Prior Login Date (2/2/2024 7:28:17 AM), and Most Recently Updated Résumé (asst created on 12/7/2023, modified on 12/7/2023, and expires 3/6/2024). Below this is a calendar view with a red box highlighting an appointment on Friday, February 2nd, labeled 'SNAP E & T initial appointment'. To the right, a 'Main Info' sidebar shows the appointment details: '12:00 PM-1:00 PM SNAP E & T initial appointment - SNAP E & T initial appointment'. Below that, an 'Attendees List' sidebar shows the name 'Smith, Fatima'.

Calendar Inserts for Initial Outreach Appointment for Individuals

Creation of Incomplete Applications from Outreach

When the Outreach Letter is generated and printed for the customer, the system will attempt to open an Incomplete program application for the corresponding program. This manifests on the Programs tab of the customer's profile.



Once staff have the customer in view and navigate to the **Program Tab**, they should see an incomplete application under the appropriate program. Instead of selecting **Create application** the staff member would select the pencil icon.

NOTE – This behavior is identical for SNAP and Choices. Whichever program was selected during the Outreach process will be the one with the Incomplete Application.

NOTE – There may be times when, for either a technical reason or a data mismatch reason, that an application may not be opened. In those instances, staff would follow the same procedure as if they were assisting a customer via walk-in.

Choices Apps: 1

[Create Choices \(TANF\) Application](#)

TANF #10751 - Incomplete  

+ LWDB:	14 - Capital Area WF Board
Onestop:	33 - 123 WF SOL Capital Area East
Open/Total Activities:	0 / 0
Application Date	02/02/2024
Participation Date:	N/A
Case Reopen Date:	N/A
Closure Date:	N/A
Exit Date:	N/A

Choices Program Application

Choices Participant Application

Training Objectives

The following module will focus on primary staff functions used for managing program applications.

After completing this module, you will be able to:

- Navigate to the Choices application in the Programs tab.
- Confirm prior participation status.
- Enter the required information to complete the program application wizard.
- Review any interfaced or prepopulated data.

When an individual is first referred and enrolled in Choices, the system stores application information that is imported through an interface with the HHSC, and some information is prepopulated by the initial registration into the program. Staff will only need to verify that the information received is accurate and complete any missing sections, since the referring HHSC agency makes the eligibility determination for Choices services. **For the purposes of training, we will be entering all application data.**

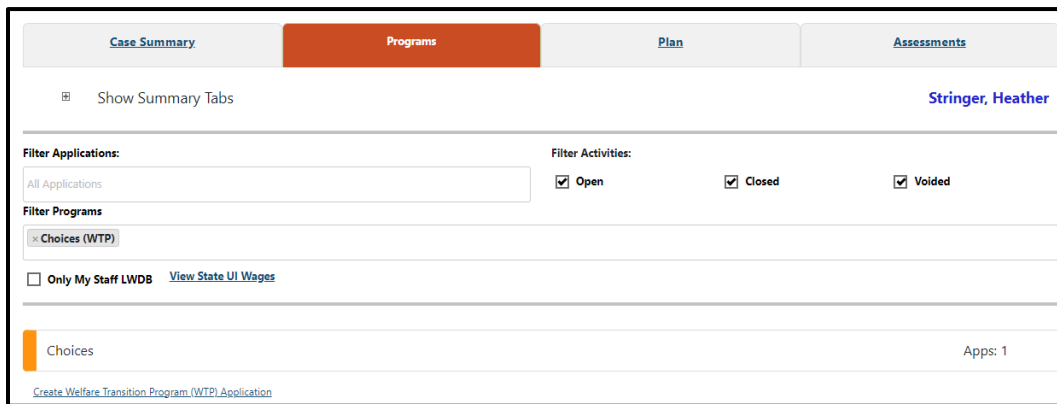
Note: This process will be followed for any TANF customer who has not cleared HHSC certification and is treated like a walk in. The process covered in training will match a walk-in scenario since the interface does not exist in the training environment.

For a customer being served through the Outreach Process, the Choices Program Application is started by the system and will already be in an incomplete status by the time a Staff Member

begins assisting the individual. In this instance, the Staff Member would simply edit the existing application via the Edit Pencil instead of clicking Create Application.

To complete a Choices application:

1. Find and assist the desired individual, then navigate to their Programs tab.



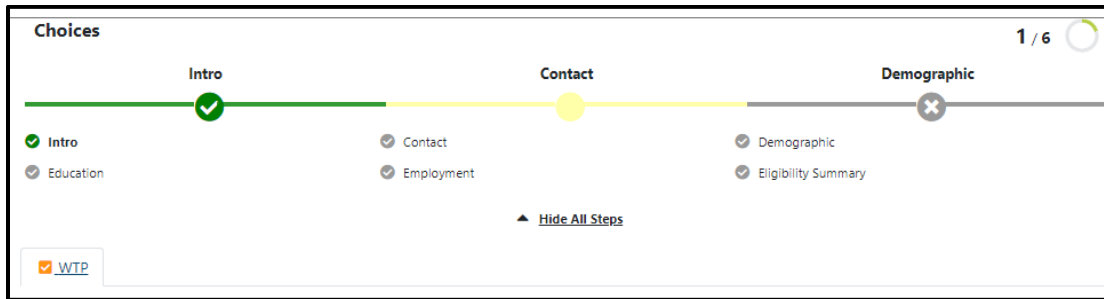
Programs Tab – Choices Panel

2. In the Choices panel, click the Create **Choices (TANF) Application** link. The Intro page of the wizard displays with a progress bar at the top.

Note: If a Partial application was previously created, for example, from the outreach pool process, you will not click the Create link; the partial app will be listed as **Incomplete** below the link, and you will click the pencil icon on the right side of the panel to open it and complete it.

You may also need to go through the wizard if an application was started via an interface from another system. There may be required fields on some of the following pages that need to be filled in before the application is deemed as **Complete** and this can be done during the initial meeting with the client.

Navigating the Application Wizard



Choices Application Wizard Progress Bar and List of Steps

- The application wizard highlights the first step, **Intro**. A progress bar remains at the top of the application through all steps to show progress. To hide the list of steps, click the **Hide All Steps** link; the progress bar remains. To re-display the steps, click the **Show All Steps** link.
- The current step displays as bold with a yellow solid circle on the progress bar; completed steps are green with a check mark in the circle; and incomplete steps are grey with an X in the circle. Once a step has been completed, the step name becomes a link that can be used to navigate to that page.
- To display key details about the individual such as username, email address, and phone number, click the **Individual Detail** button located below the individual's name. Click the **Close Individual Detail** button to close the details display.



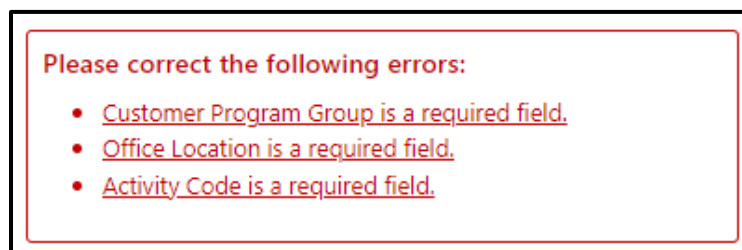
Individual Detail Button Located on Intro Page of Application

- Fields marked with a red asterisk are required fields.

A screenshot of a form section. The first field is labeled '* Primary Phone Number:' and contains the value '(214) 989-3498' with a small US flag icon to its right. The second field is labeled '* Primary Phone Type:' and is a dropdown menu with 'Cell/Mobile Phone' selected and a downward arrow.

Required Fields Indicated with an Asterisk

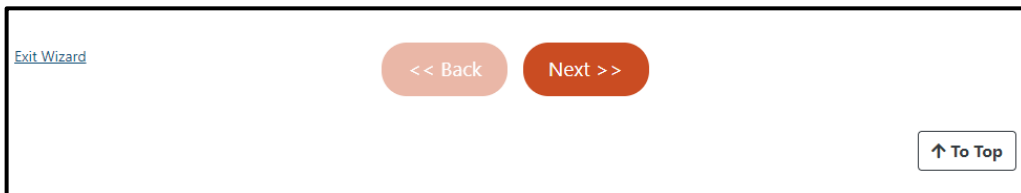
- If an entry is missing in one or more of these fields when the Next button is clicked, a message displays in red indicating which data is missing. Complete the field(s) and click the **Next** button to proceed.



Notification of a Missing Required Field

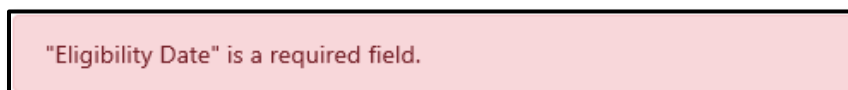
- To save data and advance to the next step in the application, click the **Next** button at the bottom of the page. While the system is Validating and Saving Data, Updating Wizard, and Redirecting to the next step, a progress bar of these activities displays at the bottom of the page.
- Use the **Back** button to return to the previous step.

- Clicking the **Exit Wizard** link located at the bottom of each page exits the application. Data on the current page is not saved; only data entered through the previous page is saved. Exiting in this manner before the final step is saved, will result in an **Incomplete application**.



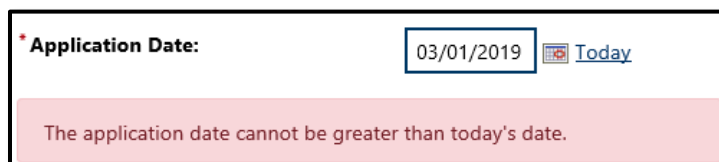
Buttons and Links Available at the Bottom of Every Choices Application Wizard Page

- Fields marked with a red asterisk are required fields. If an entry is missing in one or more of these fields when the Next button is clicked, a message displays in red indicating which data is missing. Complete the field(s) and click the Next button to proceed.



Example Notification of a Missing Required Field

- If an entry violates a business rule or is incomplete, the system displays a notification in red. Correct the entry to clear the notification.



Example Notification of an Unacceptable Entry in a Data Field





The information icon at the right of each page will display instructions or information for completing the current page.

Completing the Choices Application Wizard

Intro Page

Many of the Intro page fields are prefilled from the individual's registration.

HHSC Referred – Update to Applicant funding eligibility

Case Application ID:	12511
* TANF Case Number:	195147
Case Manager:	.
* Application Date:	10/25/2023  Today
Choices Eligibility Date:	
<input type="checkbox"/> Conditional Applicant	
TANF Application Date:	10/25/2023  Today
WOA Date:	10/25/2023  Today
* HHSC Type Program:	01 - TANF cash assistance and Medicaid ▾
* TANF Applicant Work Code:	G - Single parent/caretaker relative caring for a child under age 1 ▾
Initial Appointment Date:	10/25/2023  Today

Choices Application – Intro Page

1. **LWDB/Region** and **Office Location** may be pre-filled based on the default area and office for the staff member working the application; modify, if necessary.
2. Click **Next** to validate and save your entries and proceed to the Contact page.

Note: Each time you click **Next**, the current page's data is saved; if you leave the page without clicking **Next** (e.g., by clicking the **Exit Wizard** link or using the browser buttons or history), the data on the current page will not be saved.

Contact Page

Many of the Contact page fields are prefilled from the individual's registration.

Cates, Amanda

Contact Information

* First Name:

Middle Initial:

* Last Name (including suffix e.g. Jr., Sr., PhD, etc.):

* Social Security Number:
[Edit SSN](#)

Residential Address


* Address 1:

Address 2:

* Zip/Postal Code: [Find Zip Code](#)

Choices Application – Contact Page

1. Ensure that all entries are correct and that all required fields are completed. Required fields are marked with a red asterisk (*). The **Edit SSN** link is available only to staff with proper privileges.
2. To add to or change Alternate Contacts, click the **Add New Contact** link, complete the fields that display, then click **Save**.

Contact Name	Relationship	Phone Number	Date Inactive	Action
There are currently no alternate contacts for this user.				
<input type="button" value="Add New Contact"/>				
Add Contact				
* Contact Name:	<input type="text"/>			
Address 1:	<input type="text"/>			
Address 2:	<input type="text"/>			
City:	<input type="text"/>			
State:	None Selected ▼			
Zip Code:	<input type="text"/>	Zip Code Lookup 		
* Phone Number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Alternate Contacts Screen

Note: Data in other sections, such as address and phone information, is prefilled with data previously saved. Review and add or adjust data, as appropriate.

3. Click **Next** to save your edits and continue to the Demographic page.

Demographic Page

Many of the Demographic page fields are prefilled from the individual's registration.

1. Ensure that all entries are correct and that all required fields are completed. Some selections will cause additional required fields to appear.

Demographic Information

* **Date of Birth:** [Edit Date Of Birth](#)

Today's Age: 28

TANF/Choices Application Age: 28

* **Gender:** Female Male Did not self-identify

* **U.S. Citizenship Status:**

* **Hispanic/Latino Heritage:** Yes No Did not self-identify

* **Race (Ethnicity) check all that apply:** African American/Black
 American Indian/Alaskan Native
 Asian
 Hawaiian/Other Pacific Islander
 White
 I do not wish to answer.

* **Do you primarily speak a language other than English?** Yes No

* **Do you require English language assistance?** Yes No

* **Served in the U.S. Military:** Yes No

* **Considered to have a disability:** Yes No Did not self-identify

[Add/View Basic Skills Scores](#)

Parent Training: Yes No

Choices Application – Demographic Page

2. Click **Next** to save your edits and proceed to the Education page.

Education Page

Education page data may be prefilled from the individual's registration.

Education Information

Information entered on this screen is related to the specific individual only.

* What is your highest grade completed (from Individual Registration)? Bachelor's Degree

* Are you currently enrolled in school? No, Not Attending Any School

Individual Education History

[View Background Summary](#)

Degree	Issuing Institution	Location	Completion Date	Action
High School Diploma	Cherry Hill High School	NJ	-	Edit Delete

[Add Education History](#)

Choices Application – Education Page

1. If not already entered, select the client's **highest grade completed** from the drop-down list. If you select any option other than **No School Grades Completed**, you must enter their education history:
 - i. To add or change entries in the individual's Education History, click the **Add Education History** or **Edit** link. Complete the fields in the pop-up window that opens, and then click **Save**.

Note: Do not complete a history record for education levels below High School (K-8).

2. Specify if the individual is **currently enrolled in school**.
3. Click **Next** to save your edits and continue to the Employment page.

Employment Page

Employment page data may be prefilled from the individual's registration.

Employment Information

* Have you ever worked? Yes No

Individual Employment History

[View Background Summary](#)

Company Name	Location	Job Title (Occupation)	Start/End Dates	Action
Starbucks	432 US Highway 202 206 Bedminster, NJ 07921	Barista (Baristas)	01/16/2019 - 04/01/2019	Edit Delete


[Add Employment History](#)

Choices Application – Employment Page

1. Specify if the client **has ever worked**. If **Yes**, you must enter their employment history:
 - i. To add or change entries in the individual's Employment History, click the **Add Employment History** or **Edit** link.
 - ii. Complete the fields in the pop-up window that opens, and then click **Save**.
 - iii. Confirm whether the individual wishes to add the job to any active résumés they may have online, and to their background information, as well as if they want to add any skills, tools, and technology associated with the occupation to their skills list.
2. Click **Next** to save your edits and continue to the Eligibility Summary page.

Eligibility Summary Page

The Eligibility Summary page indicates whether the applicant is eligible for benefits (in most cases, they will be determined as eligible by HHSC staff).

Choices (TANF) Eligibility Information	
TANF Applicant	Yes
Choices	No
Choices Plus	No
Application Status:	Choices
Current Case Manager:	Case currently Not Assigned to a Case Manager Assign Case Manager  Assign Me Remove Case Manager Assignment

Choices Application – Eligibility Summary Page

1. Review the eligibility fields:
 - i. If **No**, you may need to change information on the previous pages to obtain a **Yes**. You can jump to a page by clicking a link in the wizard progress bar at the top of the page.

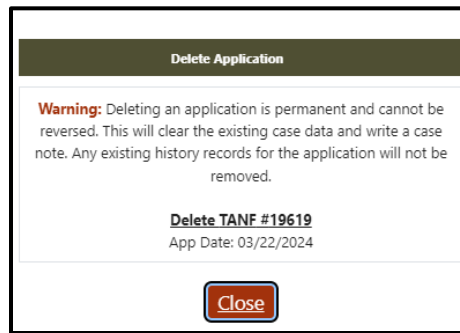
Note: To save changes on any pages you revisit, you must click **Next** for those changes to be saved; if you use the progress bar links after making changes, they will not be saved.

- ii. If **Yes**, you will be able to continue with a Participation record and start initial enrollment in activities for the individual after you click **Finish**.

The **Application Status** field is read-only:

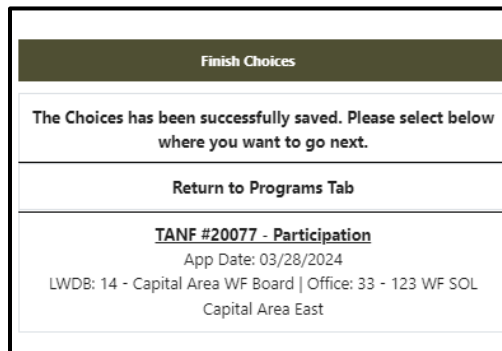
- iii. When HHSC Status is **Active** or **Pending**, and there is no case manager assigned, and there is no closure date, the status is set to **Pending**.
 - iv. When HHSC Status is **Active** or **Pending**, and there is a case manager assigned, and there is no closure date, the status is set to **Active**.
 - v. When a closure date has been entered, the status is set to **Inactive (Closed)**.
2. To assign or remove a Case Manager:
- i. Click the **Assign Case Manager** link to assign a case manager to this application.
 - ii. Click the **Assign Me** link to assign this application to your own case load.
 - iii. Click the **Remove Case Manager Assignment** link to remove any Case Manager assigned to this application.
3. To print or download a PDF copy of the application, click the **Print** button. A PDF window opens, from which the application can be printed or downloaded, with or without disability information included.
4. To delete the application (staff must have proper privilege to do so), click the **Delete** button. A warning displays that the application will be permanently deleted and cannot be reversed. This will clear the existing case data and write a case note. Any existing history records for the application will be preserved.
- i. To delete the application, click the **Delete TANF #xxxx** link, or to preserve the application, click **Close. Only**

staff who have appropriate privileges can delete a Choices application.



Delete Application Warning Pop-up

5. To complete the application, click the **Finish** button. A pop-up displays with options for what to do next (see figure below).



Finish Application Pop-up

6. To go to the Programs tab and not complete the Participation record at this time, click **Return to Programs Tab**. OR,
7. To complete the Participation record (and then continue to add the first service), click the **TANF #xxxxxx - Participation** link. The Participation form displays.

Note: You must complete a Participation record for the client before you can proceed with adding the first service for them in Choices, and you must save a service enrollment to retain the Participation record.

Once a Choices application has been successfully completed for an eligible individual, other forms and plans become available below their completed application section. Two that must be completed for an individual to be considered a program participant are the Participation form and a first activity/service enrollment.

Choices HHSC Information Ribbon

Training Objectives

The following module will focus on reviewing participant information captured and interfaced by HHSC.

After completing this module, you will be able to:

- Navigate to the HHSC Information Ribbon.
- Review Interfaced data.


Before Texas Health and Human Services (HHSC) refers an individual to Choices, they will gather data to determine if the person meets certain criteria for TANF. Once the individual is TANF eligible, they can then be certified for Choices eligibility. All eligibility determinations are done by HHSC and sent via interface.



Sites configured for a batch job interface will have HHSC data imported to the Choices module nightly, which will include the HHSC Client ID number, any Service Needs Assessment (SNA) information, or any other information HHSC collected to determine if the person meets participation criteria.



The information from this interface displays on a form that staff can view or print from the individual's Programs tab under the HHSC Information ribbon (see figure on the next page), and which the Choices case manager may find useful to complete the application and start services for the individual.

To view imported HHSC information:

1. Find and assist the desired individual, then navigate to their Programs tab.

Note: If you already have the individual's account open, select the **plus sign icon**  located below the TANF case number. The ribbons menu will expand to reveal all the Choices/TANF ribbons and skip to step #3 below.

2. Click the **plus sign icon**  to expand their Choices Program application panel.
3. Click the **plus sign icon**  to expand the HHSC Information ribbon I and click the **HHSC Information** link.

HHSC	
Currently Managing HARLOW, VANESSA	
This Page displays the TANF Information Page	
Client Identification	
	
HHSC Client Number:	
Name:	
SSN:	
Date of Birth:	
User Name:	
User ID:	
State ID:	
Assigned Case Manager:	
Date Created:	
Date Last Updated:	
Last Updated Action Code:	
Contact	
	
Residential Address:	
Mailing Address:	
HHSC Mailing Address:	
HHSC Residential Address:	

Accessing a Sample HHSC Information Form

Note: This is not a static form. Information comes through the interface on a nightly basis, and many of the fields and data

contained in the HHSC Information form are subject to future updates from HHSC.

Choices Benefits Information Ribbon

Training Objectives

After completing this module, you will be able to:

- Validate information sent via interface.
- Modify filters related to Benefit history.
- Identify Benefit data available.

To view the benefits interface:

1. From the Choices ribbons menu, select the **Benefits Information** ribbon.

The Benefits Information Ribbon is a historical record of all benefit payments received under Choices (TANF) participation. This information is provided by HHSC via an interface upload to the WIT system. This page is a view-only section, that utilizes filters. Staff members will not have the ability to perform any data entry within this ribbon.

The screenshot shows the 'Benefits Information' ribbon in the WorkinTexas.com system. At the top, it indicates 'Currently Managing WOUNDEDONE, TESTINGPIR(SBE)'. Below this, there are filter options including 'Show: Last 3 Months' and a 'Customized date range' section with 'From: 04/01/2023' and 'To: 05/31/2023'. A search bar is located on the right side of the table header. The table itself has 14 columns: Service Month, Benefits Issue Date, Benefits Amount, Warrant File, EDG Number, Partial Month Begin Date, Partial Month End Date, WPS Code, HHSC Type Program, Work Code, Primary SIG, Secondary SIG, Zip, County, and LWDB Office. A single data row is visible for January 2023.

Service Month	Benefits Issue Date	Benefits Amount	Warrant File	EDG Number	Partial Month Begin Date	Partial Month End Date	WPS Code	HHSC Type Program	Work Code	Primary SIG	Secondary SIG	Zip	County	LWDB Office
January 2023	01/01/2023	\$100.01	Yes	999	01/01/2023	01/01/2023	1 - Disregarded from participation rate, single custodial parent with child under 12 months.	03 - Medicaid only/TANF grant < \$10	M - Mandatory	0 - Disqualified caretaker	K - Child whose mother is under 20 and is on the same grant; L - Minor child with child of her own	32819	1	

Benefits History Table

To facilitate reviewing the benefit history for the participant, various filter options are available to staff members. These include:

- Show Filter allows for quick selection of a particular timeframe.
 - All.
 - Current.
 - Last Month.
 - Last 3 Months (default option).
 - Last 4 through Last 12 months are also selectable.
- Customized Date Range is essentially a date picker option.
 - Select a From date by entering a specific date in the field, selecting the calendar icon, or clicking the **Today** hyperlink.
 - Enter a To date by entering a specific date in the field, selecting the calendar icon, or clicking the **Today** hyperlink.

Based on the filter selections available, a table will present with each instance of benefit payments listed out as a separate row. The following data set columns are available:

- Service Month.
- Benefits Issue Date.
- Benefits Amount.
- Warrant File.

- EDG Number.
- Partial Month Begin Date.
- Partial Month End Date.
- WPS Code.
- HHSC Type Program.
- Work Code.
- Primary SIG.
- Secondary SIG.
- Zip.
- County.
- LWDB Office.

Choices Participation Ribbon



Training Objectives

After completing this module, you will be able to:


- Navigate to the Participation Ribbon.
- Create a participation service.
- Begin program participation for the individual.

Staff must enter Participation before they can add any activities or services for the participant. Normally you will do this right after completing the application, and then enter the first activity.

Manually creating a Participation Form:

1. From the Finish Application pop-up confirmation, click the **Choices/TANF #xxxx - Participation** link, or
From the individual's Programs tab:
2. Click the **plus sign icon**  to expand their Choices ribbon.
3. Click the **plus sign icon**  to expand the Participation ribbon.
4. Click the **Create Participation** link. The Participation Information form displays.

Participation Information

* **Participation Date** (mm/dd/yyyy)  Today !

Participation Age

* **Highest Education Level Achieved**

* **Are You Attending School?**

* **Employment Status at Time of Participation**

* **UC/UI Eligibility status at Participation**

[Exit Wizard](#)

<< Back
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Participation Record Form

5. The **Participation Date** field defaults to the current day and is the date of the first service; if necessary, enter a different date no earlier than the application creation date.
6. Enter or Verify Education information, Employment Status, and UC/UI eligibility.
7. Click **Next**. The Activity Enrollment wizard opens to the General Information tab.
8. Select the Customer Program Group.
9. Under the **Enrollment Information** section, click the **Select Activity Code** link to add the activity code.
10. The **Actual Begin Date** is prepopulated for you.
11. Select the **Projected End Date**.

12. Select the **Next** button. The **Service Provider** tab opens.
13. Click the **Provider, Select Service, Course or Contract** link to add a new Service.
14. Click the **Next** button.
15. If you are ready to Close the service fill out the closure information. If the service is staying open just click the Finish button.

Note: If you do not complete a first enrollment (i.e., if you exit the enrollment wizard before saving the last page), this Participation record will not be saved.

16. Once the Participation form is saved, the link changes to **Edit Participation** in the Participation ribbon.
17. This new activity you just added will display in a table under the **Activities/Enrollments/Services** ribbon from which staff can view and modify the activities (see figure below).

PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
✓	✓	C	8187	205 - Individual Employment Plan (IEP/EDP) Sample Office Service Provider	W	TANF Applicant	N/A	N/A	03/22/2024	03/22/2024	03/22/2024 Successful Completion
✓	✓	C	8186	102 - Initial Assessment Sample Office Service Provider	W	TANF Applicant	N/A	N/A	03/22/2024	03/22/2024	03/22/2024 Successful Completion

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Activities/Enrollments/Services Ribbon with Existing Activities

18. To update an existing service, click the wizard icon (round purple icon) in the Actions column (see figure above). The Activity Enrollment wizard displays on the General Information tab.

Choices Work Readiness Assessment Ribbon

Training Objectives



After completing this module, you will be able to:

- Navigate the Work Readiness Form.
- Capture potential participant barriers.

The Work Readiness Assessment (WRA) is an optional form you can use to identify needs and barriers to employment for a Choices participant. The Barrier categories include Basic Needs, Educational Factors, Health Factors, Judicial System Involvement, and Employability. You can also attach various assessment results, including Basic Skills and Aptitude, to the WRA.

The WRA acts as a living document that may be updated any time the participant's circumstances change. Modifications made to the WRA will have history tracking so original answers can always be viewed.

Create Work Readiness Assessment for Choices participant:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their Choices Program application panel.
3. Click the **plus sign icon**  to expand the Work Readiness Assessment ribbon.

4. Click the **Create Work Readiness Assessment** link. The Work Readiness Assessment form displays (see figure below).

Basic Needs Evaluation

***Housing:**

- No issues reported
- Has difficulty paying for food, utilities, bills, etc.
- Facing eviction
- Living in unsafe conditions
- Resides in a shelter or temporary housing arrangement
- Homeless
- Add "Housing" barrier**

***Personal/Family Issues:**

- No issues reported
- Children having problems in school
- DFPS Involvement
- Household members with health issues
- Add "Personal/Family Issues" Barrier**

***Child Care Availability:**

- Has adequate and reliable childcare
- Childcare is not needed at this time
- Needs help arranging childcare
- Lacks adequate and/or reliable childcare
- Child with special needs who requires specialized care
- Lacks reliable childcare within reasonable distance to/from home, work, or activity site
- Add "Child Care Availability" Barrier**

***Child Care Expenses:**

- Has sufficient resources to cover expenses
- Childcare is not needed at this time
- Financially unable to pay childcare expenses
- Needs childcare subsidy such as CCS
- Add "Child Care Expenses" Barrier**

Work Readiness Assessment Form with Health Factors Displayed

5. Check as many boxes in each subcategory as needed for all applicable barriers and needs. You must check at least one box in each subcategory.
 - i. When there are one or more barriers for a subcategory, you can click the red **Add <subcategory> Barrier** checkbox, and that subcategory will display in a list of current subcategory barriers when the form is saved. The summarized list is shown in the Barriers to Employment section at the bottom of the form and in

the summary table of the Work Readiness Assessment ribbon of the Programs.

- ii. If there is no barrier for a subcategory, check the No Issues Reported box.
 - iii. To add a barrier that is not represented on the form, enter it in the **Other** text box in the Other Barriers Not Listed section, and then click the **Add Barrier** link. It is added to a box that displays. Repeat for as many barriers as needed.
6. Add any optional **comments** in the text box in the Comments section.
 7. To add or create an assessment record, such as Basic Skills or Aptitude, click one of the links in the Test Information (see figure on previous page). From any assessment page that displays, you can select an existing assessment record or create a new one to add to the WRA.
 8. Click the **Save** button. The Programs tab redisplay with form listed in a summary table in the Work Readiness Assessment ribbon.



Create Date	Current Barriers	SNAP Status	Date Last Edited	Edited By	Action
8/30/2023	Language, Credential, Limited Work History		8/30/2023	Chris Cekan	Edit Delete Print View Barrier History

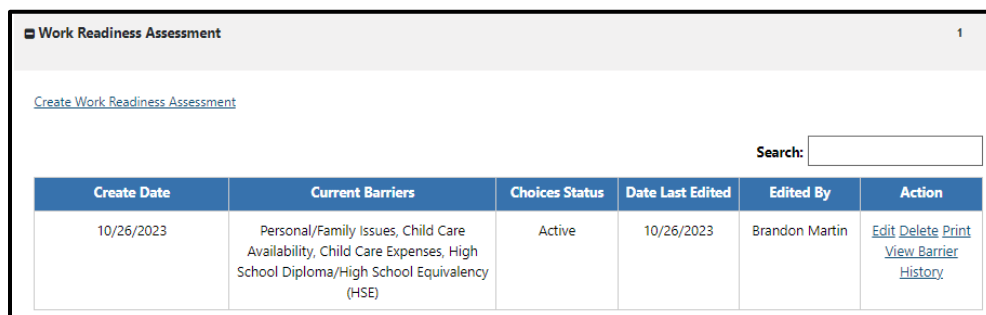
Work Readiness Assessment Table

Managing an Existing Work Readiness Assessment

From the Work Readiness Assessment ribbon of an individual’s Programs tab, you can modify, print, and delete a WRA form, as well as view the history of barrier changes. Every time you edit and save the WRA form, the barrier category changes (added/removed) are added to a history table for tracking purposes.

To manage an existing WRA:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their Choices Program application section.
3. Click the **plus sign icon**  to expand the Work Readiness Assessment ribbon and see the existing assessment (see figure below). To edit the form, skip to step 5.



Create Date	Current Barriers	Choices Status	Date Last Edited	Edited By	Action
10/26/2023	Personal/Family Issues, Child Care Availability, Child Care Expenses, High School Diploma/High School Equivalency (HSE)	Active	10/26/2023	Brandon Martin	Edit Delete Print View Barrier History

Work Readiness Assessment Ribbon with Existing Assessment

4. From the Work Readiness Assessment ribbon, tasks you can perform are:

- i. **Delete WRA form** – Click the **Delete** link in the Action column to open the WRA page. Scroll to the bottom and click the **Delete** button, then click **OK** to confirm.
- ii. **Print WRA form** – Click the **Print** link in the Action column. A PDF viewer window opens, from which you can print or download the form.
- iii. **View barrier history** – Click the **View Barrier History** link in the Action column. A pop-up window opens, listing barrier categories that were removed (**closed**) from the WRA (see figure below).

Barrier History						
Barrier	Date Identified	Date Closed	Closed By	Date last Edited	Edited By	Action
Personal/Family Issues	10/26/2023	10/26/2023	Brandon Martin			Delete

[Close Barrier History](#)

Barrier History Table

- 5. To edit the WRA form, including closing out barriers, click the **Edit** link in the Action column.
- 6. When all desired changes have been made to the WRA form, click the **Save** button. The Programs tab redisplay.

Adding and Removing Barriers

To add a new barrier, check its checkbox. To add its subcategory to the Barriers to Employment table (if not already added and thus grayed out), click its red **Add <subcategory> Barrier** checkbox, as well (see figure below).

*Physical Issues:

- No issues reported
- Receiving treatment from a licensed physician
- Currently has significant physical health issue(s)
- In rehabilitation or recovery from significant health issue
- Add *Physical Health Issues* Barrier

Adding a Barrier and Its Category to the Barriers to Employment Table


If a barrier is no longer applicable, uncheck its checkbox. If no barriers within a subcategory are checked as applicable, check the first checkbox in the section, often labeled **as No issues reported** (see figure below). For example, uncheck the **Has limited/no work history** box, and check the **No issues reported** box.


*Work History:









- No issues reported
- Has limited/no work history
- Sporadic or short-term episodes of employment
- Recently fired from a job for misconduct
- Frequent job changes
- Minimal or insufficient earnings from self-employment
- Add *Limited Work History* Barrier

Removing a Barrier and Setting a Barrier Category to No Issues Reported

Editing and Removing Categories from the Barriers to Employment Table

To change the date on which a barrier category was first identified, click the **plus sign icon**  to the right of the date in the Date Identified column, enter the new date, and click the **OK** button (see figure below).

To remove a barrier category (e.g., **Work History** in figure above) from the Barriers to Employment table (when it is no longer applicable for the client), scroll down to the table, locate the desired category, and click the **plus sign icon**  to the right of **Close Barrier** in the Action column (see figure below).

Barriers to Employment		
Barriers to Employment	Date Identified	Action
Child Care Availability	10/26/2023   OK	Close Barrier 
Child Care Expenses	10/26/2023 	10/26/2023   OK
High School Diploma/High School Equivalency (HSE)	10/26/2023 	Close Barrier 



[View Barrier History](#)

Closing a Barrier Category and Changing Identified Date in the Barriers to Employment Table

If the date is accurate, click the **OK** button; if needed, change the date on which the category should be marked as **Closed** and then click **OK** (see figure above).


Editing and Removing Entries from the Barrier History Table

To view the Barrier History table, click the **[View Barrier History](#)** link below the table in the Barriers to Employment section. To close the section, click the **[Close Barrier History](#)** link (see figure below).

Barrier History						
Barrier	Date Identified	Date Closed	Closed By	Date last Edited	Edited By	Action
Personal/Family Issues	10/26/2023 	10/26/2023 	Brandon Martin	10/26/2023	Brandon Martin	Delete

[Close Barrier History](#)

Barrier History Table

To change any dates in the table, click the **plus sign icon**  to the right of the date in either date column, enter the new date, and click the **OK** button.

To delete an entry from the history record, click the applicable **Delete** link in the Action column and click **OK** to confirm.

Choices Activities, Enrollments, Services Ribbon



Training Objectives

After completing this module, you will be able to:

- Navigate to the Activities/Enrollments/Services Ribbon.
- Add appropriate Activities, Enrollments, and Services for plan participation.
- Enter and identify provider details.

After individuals have been approved for participation in Choices, you can begin enrolling them in activities and services. Once services have been rendered to assist the participant with overcoming any barriers to employment, you can place them in an appropriate countable work activity.

To add a new activity, enrollment, or service:

1. If coming from the individual's Participation record after completing an application, you will come to the General Information tab of the Activity Enrollment wizard; skip to the General Information Tab below *or*, Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their Choices Program application ribbon.
3. Click the **plus sign icon**  to expand the Activities/Enrollments/Services ribbon. Any activities added previously display in a table from which staff can view and modify the activities (see below).

Activities / Enrollments / Services 1

[Create Activity / Enrollment / Service](#)

Search:

PE	EE	Status	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
			102 - Initial Assessment Sample Office Service Provider		Choices - TANF	N/A	N/A	10/26/2023	10/26/2023	10/26/2023 Successful Completion

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Activities/Enrollments/Services Ribbon with Existing Activities

- Click the **Create Activity / Enrollment / Service** link to create an activity or click the wizard icon in the Actions column to update an existing one. The Activity Enrollment wizard displays on the General Information tab.

General Information Tab

The General Information tab records basic information about the individual, assisting staff member, and service the individual is seeking. Selections made on this first tab determine the available activity/service codes, service providers, and services, courses, or contracts available in later steps.

Enrollment Budget		Budget Planning		Closure Information	
General Information		Schedule	Service Provider	Enrollment Cost	Financial Aid
General Information					
Participant User Name:	BLMTXDOOC1				
Participant State ID:	15073				
Last Name, First Name MI:	Foster, Rebekah				
Address:	12281 Aspen Ave Austin, TX 73301				
Application Summary:	Program: Choices Application Date: 03/22/2024 Eligibility Date: 03/22/2024				
Participation Date:	03/22/2024				
Minimum Required Hours of Countable Work Activity Per Week:	N/A				
* Customer Program Group:	T - Choices <small>Customer program group cannot be modified.</small>				
* LWDB:	Capital Area WF Board <small>LWDB cannot be modified.</small>				
* Office Location:	<input type="text" value="123 WF SOL Capital Area East"/>				

Activity Enrollment Wizard with Select Program Enrollment Template Highlighted

The editable fields in the General Information section are usually prefilled. The **Customer Program Group**, **LWDB**, and **Office Location** determine the list of services and activities displayed in the next section.

1. Select the **Customer Program Group, LWDB**, and **Office Location** from the drop-down lists.
2. If hours will be counted toward reporting, enter the **Assigned Hours** for the client. This minimum will vary, depending on the program eligibility rules.

Enrollment Information

Weekly Assigned Hours: Example: 99.99

* Activity Code: Individual Employment Plan (IEP/EDP)
[Select Activity Code]

* An actual begin date or a projected begin date is required.

Projected Begin Date: (mm/dd/yyyy)

Actual Begin Date:
Actual begin date may not be modified on the

* Projected End Date: (mm/dd/yyyy)

Activity Code	Activity Title	Description	Provider Type
123	Job Development Contacts (working with Employer and Job Seeker)	TWS staff contacted an employer and secured a referral to that employer on behalf of a specific job seeker who possesses skills sought by the employer, and for whom there is no suitable job posted in WorkInTexas.com. For purposes of Job Development, a referral is an interview between the job seeker and the employer, or the agreement of the employer to accept the job seeker's resume and/or application.	PS - Office Services
125	Job Search/Placement Assistance, incl. Career Counseling	TWS staff provided a job seeker with information and/or assistance in their search for employment. Choices and SNAP E&T- individual or group activities designed to help the participant secure immediate employment. WIOA	PS - Office Services

Selecting an Activity Code from the General Information Tab, Showing Pop Up Screen Connected by an Arrow

3. Click the **Select Activity Code** link to open an activity list, and then click an activity link to select it. The **Activity Code** and description fields are populated (see figure above).
4. If you have a **Projected Begin Date** for the service, enter it. If this is the first enrollment activity, it defaults to the participation date and cannot be changed. If this is for a follow-up service, this must be later than the closure date.

5. If you have an **Actual Begin Date**, enter that. If this is the first enrollment activity, it defaults to the participation date and cannot be changed.

Note: You must enter either a projected or actual begin date.

6. Enter the **Projected End Date**.

Note: Your site's service code configuration may prevent you from entering a projected end date that exceeds defined parameters; for example, if the defined duration of an activity/service cannot exceed 90 days, the system will prevent you from saving a projected end date 91 days or greater than the actual start date.

7. If your site has configured the **Occupational Training Code** field, and this is for a training-related service or activity, click the **Occupational Training Code** link to open a pop-up window to search for an occupation by keyword, and then select an occupation from the displayed list.
8. In the Staff Information section, confirm or select your **Position**, if applicable.

Staff Information

Staff ID: GSISAO

* Position: Staff

* Activity to appear on IEP: Yes No

Current Case Manager: Case currently Not Assigned to a Case Manager
[Assign Case Manager](#)
[Assign Me](#)
[Remove Case Manager Assignment](#)

Comments:

Case Notes: [[Add a new Case Note \(Opens in a new window\)](#) | [Show Filter Criteria](#)]

ID	Create Date	Subject	Action
No data found.			

General Information Tab - Staff Information Section

9. To have this activity automatically added to the participant's Individual Employment Plan (IEP), click **Yes** for **Activity to appear on IEP**.
10. Optionally, you may perform any of the following steps to complete this section:
 - i. Change the case manager assignment:
 - ii. To assign this applicant to an authorized Choices case manager, click the **Assign Case Manager** link.
 - iii. To assign this participant to yourself, click the **Assign Me** link (you must be currently assigned to the appropriate Choices case assignment group).
 - iv. To remove the currently assigned case manager, click the **Remove Case Manager Assignment** link.
 - v. Enter **Comments** regarding this enrollment record.

Note: To add a case note (using the [Add a new Case Note](#) link), you must first save the enrollment record, and then edit it to add the note.

11. Click **Next** to save the information and proceed to the next tab.
12. The Service Provider tab opens.
13. Click the Select Service, Course or Contract link to add a new service.
14. Select the **Next** button. The Closure Information tab opens.
15. Select the **Finish** button.

Note: If the activity requires scheduling, the Schedule tab displays; otherwise, the wizard skips to the Service Provider tab.

Schedule Tab

The Schedule tab displays when you have selected an activity or service that requires scheduling, as defined in the VOS Admin system (see figure below), for example, training, detailed assistance, or counseling. Use the Schedule tab to enter the times during the week in which the participant will participate in the selected activity / service. If the selected service does **not** require scheduling, the Schedule tab is skipped, and you go directly to the Service Provider tab.

Enrollment Budget		Budget Planning		Closure Information	
General Information	Schedule	Service Provider	Enrollment Cost	Financial Aid	
Enrollment Schedule Countable Activity					
Enrollment Summary: Enrollment ID: 9213 Username: BLMTXDOC2 Choices Application ID: 20187 Activity Code: 262 - Job Readiness / Employment Skills Activity Dates: 4/3/2024 - 4/3/2024					
Day of the week	Scheduled	Supplemental			Total Hours
Sunday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Monday	8:00 AM <input type="text"/>	10:00 AM <input type="text"/>	<input type="text"/>	<input type="text"/>	02:00
Tuesday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Wednesday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Thursday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Friday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Saturday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Total Scheduled Hours					02:00

Service Admin Setup and Activity Enrollment Wizard - Schedule Tab

1. In the first two columns under the Scheduled heading, click a clock icon in each field to add a start and end time for each day of the week that the individual will participate in the activity. You may also enter start and end times in the columns for Supplemental hours of participation if there is a break in hours due to a split schedule (see figure above).

2. Click **Next** to save your entries and move to the Service Provider tab.

Service Provider Tab

The Service Provider tab lets you identify the provider of the service selected on the General Information tab, select the service, course, or contract name, and optionally select the physical location and contact person associated with the service.

Enrollment Service Provider Information

Enrollment Summary: Enrollment ID: 9213
 Username: BLMTXDOC2
 Choices Application ID: 20187
 Activity Code: 262 - Job Readiness / Employment Skills
 Activity Dates: 4/3/2024 - 4/3/2024

*** Provider:**

Provider cannot be modified.

*** Service, Course or Contract:**

Provider Service cannot be modified.

Provider Locations:

[\[Select Provider Locations \]](#)

Provider Contacts:

[\[Select Provider Contacts.\]](#)

Activity Enrollment Wizard - Service Provider Tab

1. To select a **Provider**, click the **Select Provider** link to view a list of service providers that match the data relationships established on the General Information tab (Customer Program Group, LWDB, Office, and Activity

Service Code). Click on a Provider Name link to select it. If there is only one provider for the service, their name is prefilled.

2. To select a **Service, Course, or Contract**, click the **Select Service, Course or Contract** link to view a list of services the selected provider offers. Click on a name link to select the service. If there is only one service, course, or contract from that provider, it is prefilled.

Note: If the desired provider and/or service is not found, you can review the provider account (**Manage Providers ▶ Assist a Provider**) to ensure its information was properly set up. Examples of possible errors include a provider's (or program's) inactive status, the wrong provider type, the wrong program affiliation, or no provider services have been created.

3. To select the location of service delivery, click the **Select Provider Locations** link. Click on a location link to select it. If there is only one location for the provider, it is prefilled in the **Provider Locations** field.
4. To select a provider representative staff may contact for assistance, click the **Select Provider Contacts** link. Click on a name link to select it. If there is only one provider contact for the location, their name is prefilled in the **Provider Contacts** field.
5. If the selected provider and program requires additional details, such as **Unsubsidized Employment**, a Worksite Information section displays below the provider information.

- i. Enter the **Worksite Name, Address** information, **Contact Name, Phone Number, Hourly Wage**, and **Weekly Hours**.

6. Click **Next** to save the data and proceed to the next tab.

Note: The Enrollment Cost Tab, Financial Aid tab, Enrollment Budget tab, and Budget Planning tab screens are required for program services flagged as **fundable**. The system's fund tracking module tracks all fundable services but is reserved for future use. This means the system will bypass these **funding-related** screens and display the final tab screen titled Closure Information.

7. When you come to the Closure Information tab for a new activity, simply leave the fields blank and click **Finish**.

Tabs for Fundable Enrollment Activities

If your site does not have specific funds allocated for training Choices participants, and is not set up for enrollment budgets and planning, then the Activity wizard skips from the Service Provider tab to the Closure Information tab.

For sites that use the **Advanced Individual Fund Tracking (AIFT)** module to allocate funds for training Choices participants, the following funding-related tabs display for staff to document and track costs related to fundable activities/services:

Enrollment Cost Tab – This tab screen is reserved for future use.

Financial Aid Tab – This tab screen is reserved for future use.

Enrollment Budget Tab – This tab screen is reserved for future use.



Budget Planning Tab – This tab screen is reserved for future use.

Closing an Activity, Enrollment, or Service

The Closure Information tab of the Activity Enrollment wizard defines the outcome at the conclusion of the activity/service and is completed only when you are making a final closure of the activity/service enrollment.

Note: If an activity is not yet complete and you come to this tab when adding a service, simply leave the fields blank and click **Finish**.

To close an activity/service:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their Choices Program application ribbon.
3. Click the **plus sign icon**  to expand the Activities / Enrollments / Services ribbon. All previously added services are displayed in a table. Open activities have an **O** icon in the Status column (see figure below).

PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
			9213	262 - Job Readiness / Employment Skills Sample Office Service Provider		Choices - Applicant	N/A	N/A	04/03/2024	04/03/2024	Close
			8975	102 - Initial Assessment Sample Office Service Provider		Choices - Applicant	N/A	N/A	04/03/2024	04/03/2024	04/03/2024 Successful Completion

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Activities/Enrollments/Services Summary Table

- Click the **Close** link in the Actual End Date column for the desired activity. The Closure Information tab displays (see figure below).

Closure Information

Enrollment Summary: Enrollment ID: 8975
Username: BLMTXDOC2
Choices Application ID: 20187
Activity Code: 102 - Initial Assessment
Activity Dates: 4/3/2024 - 4/3/2024

Last Activity Date: [Today](#)

Completion Code:

Case Notes: [[Add a new Case Note](#) | [Show Filter Criteria](#)]

ID	Create Date	Subject	Action
No data found.			

<< Back
Finish
Delete

Closure Information Tab

- Enter the **Last Activity Date**. This cannot be a future date.

6. Select the appropriate **Completion Code**.
7. To formally document the client's service enrollment record, click the **Add a new Case Note** link, complete the applicable fields, and click **Save** to return to previous page.
8. Click **Finish**. The Programs tab redisplay with the activity status closed in the Activities / Enrollments / Services ribbon of the Choices program container.

Note: Authorized staff may void an invalid enrollment activity/service; however, this does not apply to the first enrollment record, because that establishes program participation. Staff should seek assistance from their supervisor if they mistakenly documented the first program activity/service, and it cannot be edited to correct the mistake.

Managing the Choices Service Table

The WIT system displays various information in the service table to help staff manage program service details on behalf of the individual (see image below).

PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	O	9213	262 - Job Readiness / Employment Skills Sample Office Service Provider	W	Choices - Applicant	N/A	N/A	04/03/2024	04/03/2024	Close
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C	8975	102 - Initial Assessment Sample Office Service Provider	W	Choices - Applicant	N/A	N/A	04/03/2024	04/03/2024	04/03/2024 Successful Completion





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Activities/Enrollments/Services Summary Table

These include the following:

- PE checkmark – indicates whether the service triggers program entry, based on the characteristics assigned by the System Administrator.
- EE checkmark – indicates whether the service extends soft exit to avoid a 90-day lapse in service delivery, based on the characteristics assigned by the System Administrator.

- Status – indicates the status of the program service. The system displays a status legend at the bottom of the screen (see image below). Values include:
 - O = Open
 - C = Closed
 - S = System Closed
 - V = Voided

Activity Status:  = Open,  = Closed,  = System Closed,  = Voided

Status Legend at the Bottom of the Program Page

- **Activity/Provider** link – when staff selects this link, WIT presents the program service details in view mode.
- **Actions** link – when staff selects this link, WIT presents the program service details in edit mode. This is referred to as the Edit Wizard.

Note: This is the preferred view option for most staff users.

- **Funding/Grant** display – indicates the selected customer program group for the service.
- **Projected Begin Date** – displays the future start date entered for the service. The system displays N/A if no date was entered.
- **Actual Begin Date** – displays the actual start date entered for the service. The system prevents staff from entering a future date in this field.

- **Projected End Date** – displays the estimated end date entered for the service.
- **Actual End Date** – displays the actual completion date entered for the service. The system prevents staff from entering a future date in this field.

In addition to these informational displays, WIT also provides filtering tools to help staff manipulate the information shown.

These include:

- Search field – enables staff to enter a keyword (for example, a service name) by which to search for and filter the current services displayed.
- Page navigation controls – enable staff to access the first, previous, next, and last pages displayed for multi-page service table.
- Rows filter – enables staff to increase the number of rows per page, thus decreasing the total number of pages displayed.

Individual Employment Plan (IEP)

Training Objectives

After completing this module you will be able to:

- Locate the IEP/ISS.
- Create and manage IEP Goals.
- Create IEP Objectives.

The IEP is an ongoing strategy, jointly developed by the participant and case manager, that identifies the participant's employment goals, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goals.

Note: A participant can only have one IEP open at a time, although staff from other programs may also create an IEP for the individual, so it becomes a shared commodity between/among programs. The IEP itself must be created first (Plan tab), followed by the plan's goals. A goal must be created before objectives for that goal can be recorded.



Tabs of the Individual Employment Plan/Service Strategy

The tabs must be completed in order and contain the following information:

- **Plan Tab** - Contains general information about the participant, the program they are enrolled in, and plan dates.

- **Goal Tab** - Enables staff to establish or edit goals for an IEP/SS.
- **Objectives Tab** - Enables staff to add associated with IEP/SS Goals in two ways: creating a new objective manually or selecting from a list of pre-defined objectives.

Note: Some programs may not offer pre-defined objectives.

- **Service Tab** - Displays all services provided for the individual within the program(s) selected. All services provided should relate back to the IEP objectives and goals.

To create an IEP for the assisted individual:

1. Select the **Plan** link under the Case **Management Profile** link or select the **Plan** tab located next to the Programs tab.
2. Under the Individual Employment Plan /Service Strategy section, click the **Create Individual Employment Plan/Service Strategy** button. the Plan tab of the IEP displays. If the individual has any other programs that may also be available for **funding needed activities or services**, a Currently Participating In section displays. If there are no other programs, this section does not display.
3. In the **Plan Information** section, complete the required fields, then click Next to save your data entry.

Plan Information	
* Plan Start Date	06/23/2023 (mm/dd/yyyy) Today
* LWDB/Region	Capital Area WF Board
* Plan started in office location	123 WF SOL Capital Area East
Plan closed on	<input type="text"/> (mm/dd/yyyy) Today

Create IEP - Plan Tab

To add a new goal to the IEP for the assisted individual:

1. To add a goal for the plan, click the Add New Goal link. The Add New Goal page displays (see figure below).

Goal Information	
* LWDB/Region	Capital Area WF Board
* Office	123 WF SOL Capital Area East
* Program Affiliation	<input checked="" type="checkbox"/> Choices
* Type of Goal	Education
* Term of Goal	Intermediate Term
* Description of Goal	Acquire HSE
* Date Established	10/26/2023 (mm/dd/yyyy) Today

Create IEP – Add New Goal Page

2. In the **Goal Information** section, select a LWDB/Region and Office.
3. For **Program Affiliation**, select the **Choices** check box.
4. Select a **Type of Goal**: Employment, Training, Schooling, etc.
5. Select the **Term of Goal**: Short Term, Long Term, Intermediate Term.
6. Enter a **Description of Goal**.
7. Enter the **Date Established** for the goal.
8. Enter the **Estimated Completion Date** for the goal.

Note: Leave the **Actual Completion Date** blank and the **Completion Status** set to **Open**. When closing the goal, you will enter the Actual Completion Date, select **Closed**, and indicate the Reason Closed.

9. Enter any additional information in the **Goal Details** text box.
10. Click **Save**. The Goals tab redisplay with the added goal along with links to Edit or Delete.
11. Repeat this procedure for as many goals as desired.
12. Click **Next** to proceed to the **Objectives** tab, where you add objectives that support the goals.

To add a new objective to the IEP for the assisted individual:

1. In the **Objective Information** section, click the **Add new objective** link to enter an objective for the individual manually.

Objective Information	
* Goal	Acquire HSE ▾
Goal Date Established	10/26/2023
* LWDB/Region	Capital Area WF Board ▾
* Office Location	123 WF SOL Capital Area East ▾
* Program Affiliation	Choices ▾
* Objective	Review and Select Program Local
* Date Established	10/26/2023 (mm/dd/yyyy) 📅 Today
* Review Date	10/31/2023 (mm/dd/yyyy) 📅 Today
Actual Completion Date	(mm/dd/yyyy) 📅 Today
Completion Status	Open ▾

Create IEP – Add New Objective Page (Manual Entry)

2. Select the **Goal** to be associated with this objective. The Goal Date Established field fills in automatically with the goal date.
3. Select the **LWDB/Region, Office Location, and Program Affiliation.**
4. Name the Objective, which is an activity that will serve to achieve the associated goal.

5. Enter the Date Established for the objective and the Review Date on which progress should be evaluated (defaults to 45 days after Established Date).

Note: Leave the Actual Completion Date blank and Completion Status set to Open. When closing the objective, you will supply the Actual Completion Date, select Closed, and indicate the Reason Closed.

6. Enter any additional information in the **Objective Details** text box.
7. Click **Save**. The Objectives tab redisplay with the added objective along with links to Edit or Delete.
8. Repeat this procedure for as many objectives as desired.

Pre-defined Objective: Instead of defining an objective in a free-form fashion, pre-defined objectives may be available for selection based on the program affiliated with the goal.

Note: Pre-defined objectives must be set by the State and may not necessarily apply to this program.

To add a pre-defined objective to the IEP for the assisted individual:

1. On the Objectives tab, click the Select pre-defined objectives link.
2. Select the Goal for the objective(s).
3. Select the LWDB/Region and Office Location if it's not already populated.

- Select the Program Affiliation for the objective. The page will refresh with the list of pre-defined objectives for the program (see figure below).

Objective Information

* **Goal** Acquire HSE ▾

* **LWDB/Region** Capital Area WF Board ▾

* **Office Location** 123 WF SOL Capital Area East ▾

* **Program Affiliation** Choices ▾

	Pre - defined Objectives	Date Established	Review Date
<input type="checkbox"/>	Employment - Attend Job Fair	<input type="text"/> <small>(mm/dd/yyyy) Today</small>	<input type="text"/> <small>(mm/dd/yyyy) Today</small>
<input type="checkbox"/>	Employment - Complete Company Applications	<input type="text"/> <small>(mm/dd/yyyy) Today</small>	<input type="text"/> <small>(mm/dd/yyyy) Today</small>
<input type="checkbox"/>	Employment - Complete State of Texas Application	<input type="text"/> <small>(mm/dd/yyyy) Today</small>	<input type="text"/> <small>(mm/dd/yyyy) Today</small>
<input type="checkbox"/>	Employment - Internships	<input type="text"/> <small>(mm/dd/yyyy) Today</small>	<input type="text"/> <small>(mm/dd/yyyy) Today</small>

Create IEP – Select Pre-Defined Objective Page

- Click the checkbox in the left column for each objective to add to the individual's program goal.
- Enter the Date Established for each objective and the Review Date on which progress should be evaluated.

Note: The objective Established Date must be greater than the Goal Established date, and the Review Date defaults to 45 days after the Established Date.

- Click **Save**. The Objectives tab redisplay with the added objective, along with links to Edit or Delete.
- Click **Next** to proceed to the Services tab to review (see figure below).

Note: If services or activities have been provided via the Programs tab, they will display on the IEP Services tab in view-only mode and cannot be modified from within the IEP.

IEP/ISS Services					
App # - program	Service/Activity	Begin Date	End Date	Provider	Staff
10763 - WTP	102 - Initial Assessment	A - 09/13/2023	A - 09/13/2023	Sample Office Service Provider	30628
10763 - WTP	205 - Individual Employment Plan (IEP/EDP)	A - 09/13/2023	A - 09/13/2023	Sample Office Service Provider	30628
10763 - WTP	262 - Job Readiness / Employment Skills	A - 09/13/2023	P - 09/20/2023	Sample Office Service Provider	30628

Create IEP – Services Tab

Note: By default, the system will automatically create service/activity 205 – Individual Employment Plan (IEP/EDP) when staff creates the service and display Employment Service under the Provider column heading.

9. Click **Finish** to complete the IEP/SS plan. The Plan tab of Case Management Profile redisplay with the IEP listed (see figure below).

Individual Employment Plan/Service Strategy							
#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
1264	North Texas WF Board	775 WF SOL N TX Vernon	OPEN	1	Martin, Brandon	07/23/2023	Edit Delete Display/Print


Completed IEP

Working with Existing IEP Plans

To view and print the entire plan and include signatures:


1. Click the **Display/Print** link in the Action column. (see figure above). The IEP Plan page displays.
2. To include the **Services and/or Goals** in the printed plan, in the **Plan Information** section, click the checkboxes (see figure below).

Plan Information

* Plan Start Date (mm/dd/yyyy)  Today

* LWDB/Region ▼

* Plan started in office location ▼

Plan closed on (mm/dd/yyyy)  Today

When printing plan do you want to print services?

When printing plan do you want to print Goals?

Plan Information Section of IEP Plan Page

3. To include Applicant and/or Staff Signatures, in the **Remote Signature** section, click the **Capture Signature** link for the desired person (see figure below).

The screenshot shows a web interface titled "Remote Signature". It contains two signature lines: "Applicant Signature:" and "Staff Signature:". To the right of these lines is a red-bordered box containing two "Capture Signature" buttons, each with a stylized signature icon. At the bottom of the interface are two green buttons labeled "Return" and "Print".

Remote Signature Section of IEP Plan Page

A pop-up window displays, where you select how the signatures will be obtained (see figure below).

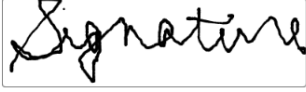
The pop-up window is titled "Select Signature Input Method". It contains two options: "Manual" with a mouse icon and the text "Using a pointer device", and "Message" with a speech bubble icon and the text "Send signature request from the Message Center". A blue "Cancel" button is located at the bottom right of the window.

Signature Capture Method Pop-up Window

- i. For customers who are present, in-person, click the **Mouse** icon.
- ii. Read the certification of understanding statements, then use the mouse to write the signature. Click **Apply** to save it and return to the Plan page.

CERTIFICATION OF UNDERSTANDING: I also understand, acknowledge, agree and certify that:

- I accept my responsibilities in the use of electronic signatures as described on this form.
- My execution of an electronic signature performed on this system is the legally binding equivalent of my traditional handwritten signature, and I am accountable and responsible for actions performed under such an electronic signature
- I may not share components of my electronic signature such that my signature could be executed by another individual. Such components may include, but are not limited to, computer passwords and/or unique identification tokens.



Signature Capture Window

- iii. For a remote participant, click the **Message** icon. The Compose Message page displays, where you can create and send an Electronic Signature Request message (see figure below).

Recipient Info

* Selected Recipient(s): Grace Hernandez

Selected Recipient(s) Number: 1

Recipient: Grace Hernandez

Sender Information

* From:

* Created by:

Delivery Method

* Select Method:

Internal Message (Message Center)

Email (If Available)

Text Message (If Available)

Use Recipient's Preferred Notification Method

Request Read Receipt: Yes No

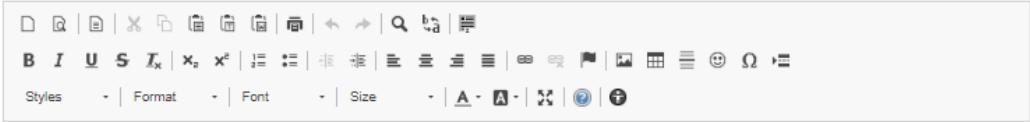
You will also receive an email notification if you select Text Message or Text Message Notification

Compose Electronic Signature Request Message Page, Top Portion

Message

* **Subject:**

* **Message:**
Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.



Hello Grace Hernandez,

John Marks has sent you a document to view and sign. Please click on the view document link below to begin signing.

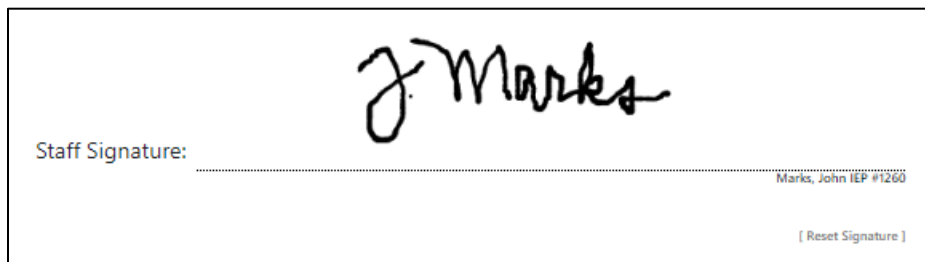
[[Clear Text](#) | [Remove All Formatting](#)]
[[Insert Template](#) | [Insert Variable](#) | [Preview Message](#)]

Signature Block Options
Add Signature:
Office for Signature:

Compose Electronic Signature Request Message Page, Bottom Portion

- After clicking **Send**, the message is sent to the recipient's Message Center, and the Plan page redisplay, showing the date and time the signature request was sent. As soon as the recipient signs the attachment using their mouse, their signature is automatically added to the plan.

4. To capture staff's signature:
 - i. Click the **Capture_Signature** link displayed on the Staff Signature line and follow the same steps as the customer. OR:
 - ii. Select the **Click this link** to use your saved signature image hyperlink if you already created one using My Staff Account. The system will automatically display your signature.



Staff Signature: Marks, John IEP #1260

[Reset Signature]

Staff's Digital Signature – System Provided

5. To print the plan, click the Print button at the bottom of the page. A PDF version is generated and displays in a pop-up window. From there, you can download or print the file.

Assessment Results in Assessments tab

Training Objectives

After completing the module, you will be able to:

- understand how to record assessment results.
- understand which assessments are recorded in the Assessments tab.

The Assessments tab is where records of assessment types and assessment results pertaining to the client are maintained.

Note: Staff may record assessment results for the individual before he/she becomes a Choices program participant.

To access the Assessments tab for the assisted individual:

1. Click to expand **Staff Profiles > Case Management Profile > Assessments**. The Assessments tab displays links to any existing assessments for the individual tab.

[Basic Skills Assessment](#)
Select this option to enter or edit basic skills assessment entries for this Individual.

[Aptitudes](#)
Select this option to edit Aptitude Assessment entries for this individual.

[Other Assessments](#)
Select this option to enter or edit other assessment entries for this Individual.

Assessments Tab Categories

The links under the Assessments tab include:

- **Basic Skills Assessment** – Enter assessment results for several different assessment tools, such as TABE and CASAS.
- **Aptitudes** – Enter assessment results for GATB and others.
- **Other Assessments** – Enter other assessments that are not covered in the other three assessment categories, such as Myers-Briggs and typing tests.

Choices Attendance Ribbon

Training Objectives

After completing this module, you will be able to:

- Navigate to the Attendance Ribbon.
- Track allowable and countable attendance that counts toward reporting.
- Apply this information to ensure the timely management of required data entry and form management.



Tracking Attendance Hours for Countable Activities

When enrolling a Choices participant in a service or activity, you can identify it **as allowable and countable** toward the participation rate by flagging it as **Counts Toward Reporting**. You'll then enter the minimum hours (this varies by state, depending on their program's eligibility rules) as the **Weekly Assigned Hours**. Then, on the Schedule tab of the enrollment wizard, you enter the scheduled days and times of the week for the countable activity.

After enrolling the individual, use the Attendance Tracking form to enter actual hours for the countable activity. There are no **lockdown dates** for entering hours after an activity is closed. You can continue to enter hours after closing an activity, as long as it was open on the day for which you are entering hours.

To track attendance hours for a countable activity:

1. Find and assist the desired individual, then navigate to their Programs tab.

2. Click the **plus sign icon**  to expand their Choices Program application ribbon.
3. Click the **plus sign icon**  to expand the Attendance ribbon.
4. Click the **Attendance Tracker** link. The Attendance Tracking page displays.
5. In the Participation Period section, select a **Year** and/or **Month** from the drop-down lists or use the default current month and year. A table displays, listing all attendance tracking activities the individual was enrolled in within that time frame (see figure below).

* Year:

* Month:

* Select Activity:

Activity/Provider	Actual Begin Date	Projected End Date	Actual End Date	Scheduled Hours	Assigned Hours	Actual Completed Hours	Study Homework Hours	Holiday Hours	Excused Hours	Total Hours Completed
262 - Job Readiness / Employment Skills - Sample Office Service Provider	10/26/2023	10/30/2023	N/A	116:06	N/A	0:00	0:00	0:00	0:00	0:00
Total Combined Hours							0:00			

* Actual Hour Entry Type:

Sample List of Services with Countable Hours

6. **Actual Hour Entry Type** should be automatically selected from the drop-down list. Options include:
 - i. **Daily Only** – Allows you to enter hours on a daily basis. This is also the default behavior if the setting is left at **None Selected**.
7. Once you make an hour entry type selection and select an activity to enter time for, you cannot change the Actual Hour Entry Type selection for the rest of the month.

8. After selecting an Actual Hour Entry Type, click the link for the desired Activity/Provider. A calendar entry grid for tracking hours for the selected month/year displays below the activity list, and the selected activity is bolded.
9. Enter the attendance hours and minutes in the format **hh:mm** (:00-:59 for actual minutes).
10. If you selected an Actual Hour Entry Type of **Daily Only**, or **None Selected**, enter the hours of attendance for each day in the corresponding box for the type (ACH, HOL, or EXC). Click the **Save Attendance** button to save the entered hours. If there are no invalid entries, the page will refresh with updates to totals shown for each week in the Weekly Total column on the right, and for the month in the Monthly Total cell at the bottom.
11. To display a printable statement of the tracked hours in PDF format, click the Print button. The form includes areas for client and staff signatures.

Note: For sites that have the Document Management module, you can save a copy of the signed form to the individual's Documents tab by following these simple steps:

Edit the form,

In the Individual Signature section, add staff and individual signatures as desired,

Click the Create PDF checkbox, and then click the Print button,

After closing the PDF viewer window, a PDF version of the form is added to the individual's Documents tab.

Household Member Information Ribbon Choices

Training Objectives

After completing this module, you will be able to:

- Review interfaced information coming from HHSC.
- Identify additional household members.
- Review a new Household member entry.

The Household Member Information Ribbon is another interface-controlled form. While the base version of this ribbon allows staff users to create records for household members, that is not possible in the Texas WIT system. All household members are added via interface and will be tied to their unique HHSC Case Number and Client Number.

Upon accessing the Household Member Information Ribbon, any existing family members will display in a table (pictured below).

Household Member Information					
Add Household Member			Search: <input type="text"/>		
Name	SSN	Gender	Date of Birth	Relationship	Action
McMuffin,Studs	XXX-XX-8097	Male	08/23/2012	Step-Child	View Edit
Baker,Louise	XXX-XX-8098	Male	10/18/2011	Step-Father	View Edit
Rose,Betty	XXX-XX-8174	Female	12/28/2009	Mother	View Edit
Dogg,Snoop	XXX-XX-8173	Male	12/28/2009	Uncle	View Edit
Gollum,Precious	XXX-XX-4935	Male	01/24/2008	Grandfather	View Edit

Page 1 of 1

Rows: 10

Household Member Information Ribbon Expanded

Note: Since the form is interface driven, staff members may be limited in their ability to edit or modify data. Process will be based on Texas policy. An example of the entry form is shown below.

Household Member Information

*** HHSC Case Number:**

*** HHSC Client Number:**

*** Status in Group:**

*** First Name:**

*** Last Name:**

Middle Initial:

Suffix (jr):

*** Social Security Number (SSN):**

*** Hispanic/Latino Heritage:** Yes No Did not self-identify

*** Race:**

- African American/Black
- American Indian/Alaskan Native
- Asian
- Hawaiian/Other Pacific Islander
- White
- I do not wish to answer

*** Date of Birth:** (mm/dd/yyyy)

*** Gender:**

*** Relationship:**

*** Eligibility Begin Date:** (mm/dd/yyyy) Today

Household Member Entry form

Choices Good Cause Ribbon

Training Objectives

After completing this module, you will be able to:

- Navigate to the Good Cause Ribbon.
- Identify Good Cause Reasons.
- Enter supporting documentation.

The Good Cause Ribbon is designed to allow Choices Staff Members to document reasons for modified participation expectations. This ribbon is a documentation only ribbon and does not automatically change or update program participation for the individual. Create a Good Cause Record for Choices: To add a Good Cause Record for the Choices program:

1. Select the **Create Good Cause** link from the **Good Cause** ribbon. The **Good Cause Wizard** window opens. (see figure below).
2. Select a reason from the Good Cause dropdown and select the reason most appropriate for the participant. See figure below for examples of potential Good Cause Reasons.

The screenshot shows a web form titled "Good Cause". On the left, there are four labeled fields: "* Reason:", "* Begin Date:", "* End Date:", and "Comments:". A dropdown menu is open over the "Reason:" field, displaying a list of reasons. The first option, "Temporary Illness/Incapacity", is highlighted in blue. Below the dropdown, there is a text area with a scroll bar and two links: "[Clear Text]" and "[Remove All Formatting]".

Field	Value
* Reason:	Temporary Illness/Incapacity
* Begin Date:	None Selected
* End Date:	Temporary Illness/Incapacity
Comments:	

- None Selected
- Temporary Illness/Incapacity
- Court Appearance
- Family Crisis/Changed Ind. Circumstances
- Lack of Transportation
- Lack of child care resources
- Lack of any other support services
- No available jobs within reasonable distance
- Caretaker of a physically/mentally disabled household member
- Victim of domestic violence
- Job referral with offer below minimum wage
- Meeting reduced work requirement
- Caring for family member not in school
- Caring for family member in school

Good Cause Reasons dropdown list

3. Enter the begin date.
4. Enter the end date.
5. Enter comments as necessary, based on policy.
6. Select the **Create Choices/TANF Form 1836 A/B** link if documentation has not occurred up to this point, entering the appropriate information.
7. If a Form 1836 A/B has already been filled out, the document will be attached below the good cause entry fields (see figure below).

Search: <input type="text"/>							
Create Date	Begin Date	End Date	Reduced Work Hours	Required Hours	Last Edit By	Last Edit Date	Action
06/28/2023	06/28/2023	07/12/2023	yes	5	Martin , Brandon (29298)	06/28/2023	Edit

Page 1 of 1

Rows: 10

Form 1836 A/B documentation

8. Select the save button to complete the record.

Choices Sanctions Ribbon

Training Objectives



After completing this module, you will be able to:

- Navigate to the Sanctions Ribbon.
- Submit a sanction recommendation to HHSC.
- Document Attachments.

If a participant falls out of compliance with employment service requirements as defined in their Employment plan without good cause, Choices staff can request a sanction for non-compliance by completing the Sanction Referral form. This form communicates the details of the non-compliance event to HHSC staff who have been designated as recipients of the form in the Administration system. The agency then conducts the investigation, makes a disposition on the case, and forwards the outcome back through the system.

The sanction will support a conciliation process designed to give HHSC staff and the Choices participant the opportunity to put forth a good faith effort to settle disputes or misunderstandings related to employment services, before adverse actions are taken.

Create Sanction Referral for Choices program:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their Choices Program ribbon.
3. Click the **plus sign icon**  to expand the ribbon. Any existing sanctions display in a table (see figure below).

[Create Sanction Referral](#)

Search:


Create Date	Create Staff	Date Sent to HHSC	Referral Reason	Non-Cooperation or Cooperating Date	Referral Status	HHSC Response	HHSC Response Date	Rejection Reason	Resent to HHSC Date	Days Pending Response	Action
03/28/2024	Martin , Brandon (30628)		Failed to participate	03/28/2024	Pending HHSC submission					0	Edit Delete

Page 1 of 1

Rows: 10

Sanctions Ribbon with Existing Sanction



4. Click the **Create Sanction Referral** link. The Sanction Referral page displays (see figure below).

HHSC EDG Number:	
User ID:	30892
State ID:	11132
Case Manager:	Brandon Martin
Staff Phone Number:	
* LWIA/Region:	Capital Area WF Board
* Office Location:	123 WF SOL Capital Area East
Sanction Referral	
* Referral Reason:	4-Failed to participate
* Non-Cooperation / Cooperation Date:	09/13/2023  Today
Comments:	

Sanction Referral Page

5. If enabled, you can select a new **LWIA/Region** and **Office Location**.
6. In the Sanction Referral section, select a **Referral Reason** from the drop-down list.
7. Enter the starting date of non-compliance in the **Non-Cooperation/ Cooperation Date** field.
8. Click the **Save** button.

To view the HHSC Determination:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their Choices Program application ribbon.
3. Click the **plus sign icon**  to expand the Sanctions ribbon and click the **Edit** link in the Action column for the desired referral. The Sanction Referral page displays.
4. Scroll down to the HHSC Response section (see figure below).

HHSC Response
HHSC Response:
Imposed Date:
HHSC Response Date:
Rejection Reason:
HHSC Good Cause Date:

Sanction Referral Page – HHSC Response Section

Form 1836A/B Ribbon

Training Objectives

After completing this module, you will be able to:


- Navigate to the Form 1836 A/B Ribbon.
- Complete Choices Form 1836A/B documentation.
- Discuss the connection between Form 1836 A/B and Good Cause entry.


When Choices staff members need to document a reduction in program participation that is of no fault of the individual, they will use a Form 1836 A/B entry. This ribbon is documentation only and does not automatically adjust program participation. This form can be completed from the Form 1836 A/B Ribbon, or it can be entered when staff members are completing the Good Cause Ribbon. Data will appear in both locations once completed.

To Create a Choices Form 1836 A/B:

1. Navigate to the Form 1836 A/B Ribbon and select the **Create TANF Form 1836 A/B** hyperlink. The form entry page will display.
2. Enter a **Begin Date**.
3. Enter an **End Date**.
4. Select whether the situation will result in a reduction in work hours.
5. Identify if the situation is a permanent reduction.
6. Add Case Notes as required by Texas policy.

Form 1836A/B

* **Begin Date:**  [Today](#)

* **End Date:**  [Today](#)

* **Reduced Work Hours:** Yes No

Permanent:

Attach Case Note

Form 1836 A/B documentation fields

7. Select the save button to complete the record.

Choices Add Employment Ribbon

Training Objectives

After completing this module, you will be able to:

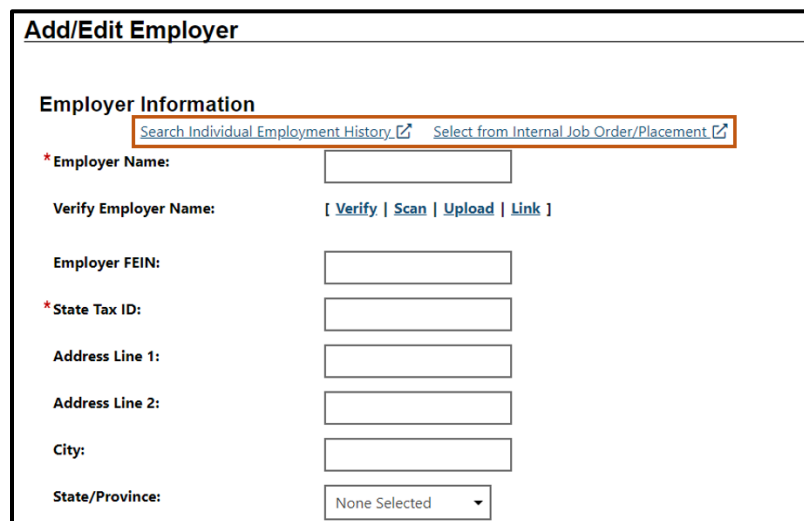
- Navigate to the Choices Employment ribbon.
- Utilize this system feature to record employment details on behalf of the individual.

Note: that Entered Employment is used for informational purposes only and is never used to meet federal reporting requirements.

Add Employment Information:

To record new employment information:

1. Select the **Add Employment** link from the **Add Employment** ribbon. The **Add/Edit Employer** page displays (see figure below).



The screenshot shows a web form titled "Add/Edit Employer". Under the "Employer Information" section, there are two links: "Search Individual Employment History" and "Select from Internal Job Order/Placement". Below these are several input fields: "* Employer Name" (text box), "Verify Employer Name" (with links for Verify, Scan, Upload, Link), "Employer FEIN" (text box), "* State Tax ID" (text box), "Address Line 1" (text box), "Address Line 2" (text box), "City" (text box), and "State/Province" (dropdown menu currently set to "None Selected").

Add/Edit Employer Page

2. Enter the **Employer Information** and **Job Information**, taking note of the required fields marked with a red asterisk.
 - i. If any employment history or internal job placements were previously entered as part of their application for a program or the individual's **Employment Plan** activities, you can use links at the top of the **Employer Information** section to select an employer and prefill the employment information.
 - a. Click either the **Search Individual Employment History** or **Select from Internal Job Order/Placement** link to display a pop-up window for employment records that were previously entered in the system for this individual.
 - b. Click the **Select** link in the Action column and click OK to confirm for the desired employment record. The information is filled in on the **Add/Edit Employer Page** for most fields in the **Employer Information** and some fields in the **Job information** section.
 - ii. If the **Individual Employment History** or **Internal Job Order/Placement** information for the employer are not available, start the form by entering the **Employer Name**. The field will dynamically display matching employers who are registered in the system.
 - iii. If the desired employer's name and address show, select it from the list. The **Employer Information** is filled in.

- iv. Continue to make entries in all required fields, and to check any fields that were auto filled. This includes the fields for employer benefits and other Yes or No questions at the bottom of the Job Information section. These are not auto filled.
3. Select **Yes** to add to employment history.
 4. Click the **Save** button. The **Add Employment** ribbon redisplay, with the added employment record listed in a table (as shown below).

The screenshot shows a web interface titled 'Add Employment' with a search bar and a table. The table has columns for Employer, Start/End Dates, City, and Action. A single record for 'Burger King' is shown with dates from 06/01/2022 to 06/27/2023. The 'Action' column contains a button labeled 'Edit Delete'.

Employer	Start/End Dates	City	Action
Burger King	06/01/2022 - 06/27/2023		Edit Delete

Employer List Table

Note: Once an **Employer** record is saved, you can view, edit, and delete the record from the table. The information entered here will also carry over to the employment history section of the individual’s **Background Wizard, assuming you selected to add to Employment History.**

Choices Credentials Ribbon

Training Objectives

After completing this module, you will be able to:

- Navigate to the Choices Credential ribbon.
- Utilize the Choices Credentials Ribbon feature to record any educational or occupational credentials a Choices participant attained while in the program, which is used for federal reporting requirements.

Add Credential for Choices program:

To add a Credential for the Choices Program:

1. Select the **Create Credential** link from the **Credentials** ribbon. The Track Credentials for Choices page displays.

Credential Information	
* Credential Received:	Secondary / High School Equivalency
Other Credential:	<input type="text"/>
* Credential Verification:	[Verify Scan Upload Link]
* Date Credential Received:	<input type="text"/> (mm/dd/yyyy) <input type="checkbox"/> Today
Associate to Training/Activity record:	[Search Activities/Services]
Staff Information	
Create Date:	3/28/2024
Created By:	Martin, Brandon
Last Edit Date:	3/28/2024
Last Edited By:	Martin, Brandon

Add Credential Screen

2. In the **General Information** section, select your **LWIA/Region** and **Office Location**.

3. In the **Credential Information** section, for **Credential Received** select the credential received.
4. For **Credential Verification**, select the **Verify** link to identify the document being used for Credential Verification. Click the **Verify** link again to hide the list.
5. Click the appropriate **Upload** link to attach an electronic copy of the document used for verification. A new window will appear where you can attach the document.
6. For **Document Description**, select **Certification Forms**.
7. For **Document Tags**, enter **an appropriate document tag**.
8. To attach the document, click the **Select File** button. A window will open where you can search for the document you want to attach.
9. Select the file from your computer and click the **Open** button.
10. Select the **Save** button.
11. Add the **Date Credential Received**. This should be the date that the credential was received by the individual.
12. To associate this credential with a **Training/Activity** the individual has been enrolled in, click the **Search Activities/Services** link. A list of the participant's enrollments appears in a pop-up window (see figure below).

Activities List ×							
Activity	Provider	Service/Course	Actual Begin Date	Projected End Date	Actual End Date	Completion Status	Action
205 – Individual Employment Plan (IEP/EDP)	Sample Office Service Provider	205 - Individual Employment Plan (IEP/EDP)	08/30/2023	08/30/2023			Select
203 – Comprehensive Objective Assessment	Sample Office Service Provider	203 - Comprehensive Objective Assessment		08/30/2023			Select
153 – Workforce Services Orientation	Sample Office Service Provider	153 - Workforce Services Orientation	08/30/2023	08/30/2023			Select

Close

Credentials Activities List Table

13. Click the **Save** button. The Programs tab redisplay, with the credential listed in the **Credentials** ribbon.

Choices Case Transfer Ribbon

Training Objectives


After completing this module, you will be able to:


- Navigate to the Case Transfer Ribbon.
- Perform a Case Transfer (with the necessary privileges)
- Process a request to transfer.

Choices participants must be actively engaged in the program, so if during participation, they move to a different service delivery region, staff with the necessary privileges will complete the Case Transfer form as soon as possible to avoid a break in participation. Case Transfer is a two-step process between staff in the requesting region and staff in the receiving region, and both will update the Case Transfer form.

Note: Staff cannot transfer a participant from one LWDB to another LWDB if they have open plans or activity enrollments; they must all be closed first. However, a participant can be transferred from one office to another in the same region even if they have open enrollments; they must acknowledge this in the message they receive.

Transfer a Case for Choices program:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their Choices Program application ribbon.

3. Click the **plus sign icon**  to expand the Case Transfer ribbon.
4. Click the **Create Case Transfer Record** link. The Case Transfer form displays (see figure below).

Case Transfer Notice

* **LWDB/Region Transfer Request being made to:** Heart of Texas WF Board ▼

* **Staff to be notified of Transfer Request:** 001 Waco ▼

* **Reason for Transfer:**

Relocation out of region

Other (Please explain)

Additional Comments:

Case Transfer Form

5. In the Case Transfer Notice section, select the **LWDB/Region** and **LWDB/Office** you are requesting the participant transfer to.
6. Select the **Staff to be notified of Transfer Request**. They will receive an internal message in their Message Center that they will need to take action on.
7. Check the box for **Reason for Transfer**. If **Other**, enter an explanation in the text box that displays.
8. If desired, enter any **Additional Comments** in the text box.
9. Click the **Save** button. The Case Transfer Notice is sent to the selected staff member in the receiving region and the Programs tab redisplay with the record added in the Case Transfer ribbon (see figure below).

Case Transfer 1

[Create Case Transfer Record](#) Search:

Create Date	Create Staff	Transfer From	Transfer To	Last Edit Date	Edit Staff	Action
10/26/2023	Brandon Martin	Capital Area WF Board	Heart of Texas WF Board			Edit

Page 1 of 1 Rows: 10



Case Transfer Ribbon Displaying Transfer Record

The receiving staff member must edit the form and complete the Case Transfer Result section. See the rest of the procedure below.

Approving or Denying a Case Transfer

The receiving region staff member edits the Case Transfer form to complete transfer request.

To complete the Case Transfer form:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their Choices Program application section.
3. Click the **plus sign icon**  to expand the Case Transfer ribbon.
4. Click the **Edit** link in the Action column (see figure below).

Create Date	Create Staff	Transfer From	Transfer To	Last Edit Date	Edit Staff	Action
10/26/2023	Brandon Martin	Capital Area WF Board	Heart of Texas WF Board			Edit

Case Transfer Ribbon with Edit Button Highlighted

The Case Transfer form displays with an added section (see figure below).

Case Transfer Result

• Transfer Accepted: Approved Denied

• New Case Assignment group:

• New Case Manager:

Additional Comments:

Application Information

Create Date: 04/26/21
 Created By: GeoSol Staff
 Last Edit Date:
 Last Edit By:

Case Transfer Result

• Transfer Accepted: Approved Denied

• Reject Reason:

Activities Not Closed
 Address Not Updated/ Data Entry Error
 Mistaken Transfer
 Other

• If other, explain:

Additional Comments:

Application Information

Create Date: 04/26/21
 Created By: GeoSol Staff
 Last Edit Date:
 Last Edit By:

Case Transfer Result with Approved and Denied Statuses Highlighted

- Specify if the **Transfer Accepted** is **Approved** or **Denied**. Depending on your response, different fields will display (see figure above).

- i. If **Approved**, select a **New Case Assignment Group** and **New Case Manager**.
 - ii. If **Denied**, check as many **Reject Reason** boxes as applicable. If **Other**, enter it in the box provided.
6. Enter any **Additional Comments**.
7. Click the **Save** button. The Programs tab redisplay, with the Last Edit Date and Edit Staff columns populated for the case transfer record you modified.

Choices Closure Ribbon

Training Objectives

After completing this module, you will be able to:

- understand the steps involved in preparing a participant for soft exit.
- understand how the exit process functions in the system.
- successfully close all services in the service table in preparation for soft exit.
- successfully close the IEP. This includes closing all objectives, the goal, and all completion dates.
- successfully complete the Closure Form and adding a new employer.
- understand how to delete a Closure if additional services are necessary.

The Closure form indicates that all of a Choices participant's planned services and activities have been completed (have a Last Activity Date and Completion Code) and the case is awaiting an actual exit from the program. It allows staff with the proper privileges to gather employment information and other data for Choices performance reporting purposes. The Closure form can only be completed after all activities/services and Employment Plan (all goals and objectives) are closed. After case closure, only follow-up services may be added for a Choices participant.

To Perform Closure of Choices Program

1. First close out all open services from the **Activities/Enrollments/Services** ribbon. All previously added services are displayed in a table. Open activities have an **O** icon in the **Status** column (see figure below).
2. To close a service, select the **Close** link in the **Actual End Date** column for the desired activity. The **Closure Information** tab displays (see figure below).

PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
✓	✓	O	8195	300 - Occupational/Vocational Training (ITA) No Provider Information	W	Choices	N/A	N/A	03/22/2024	03/29/2024	Close
✓	✓	C	8187	205 - Individual Employment Plan (IEP/EDP) Sample Office Service Provider	W	TANF Applicant	N/A	N/A	03/22/2024	03/22/2024	03/22/2024 Successful Completion
✓	✓	C	8186	102 - Initial Assessment Sample Office Service Provider	W	TANF Applicant	N/A	N/A	03/22/2024	03/22/2024	03/22/2024 Successful Completion

Services Provided Table

3. Enter the **Last Activity Date (mm/dd/yyyy)**.
4. Select **Completion Code**.

5. If applicable, add a case note by selecting the **Add a new Case Note** link, complete the applicable fields, and click **Save** to return to previous page.
6. Click the **Finish** button. The Programs tab redisplay with the activity status closed (Status icon for the activity should now be orange) in the **Activities/Enrollments/Services** ribbon.

Closing the IEP

Closing IEP Objectives and Goals

To close Objectives or Goals for the assisted individual:

Note: Remember, you must work from the **bottom up** when closing parts of a plan: Objectives first, then their associated Goals. All Objectives and Goals must be closed before the plan itself can be closed.

1. Open the plan by selecting the **Edit** link in the Action column. The Plan tab of the IEP displays.
2. Click the Objectives or Goals tab, as appropriate.
3. Click the desired **Edit** link.
4. In the Objective (or Goal) Information section, enter the **Actual Completion Date**, set the **Completion Status** to *Closed*, and then select the **Reason Closed (Successful or Unsuccessful)**.
5. Add a comment, if desired, then click **Save**. The tab redisplay with the **Closed** status. Repeat as needed.

Closing the IEP for the Individual


Before closing a plan, you must close all Objectives and Goals associated with the plan, working **from the bottom up**: Objectives first, then Goals, then the plan.

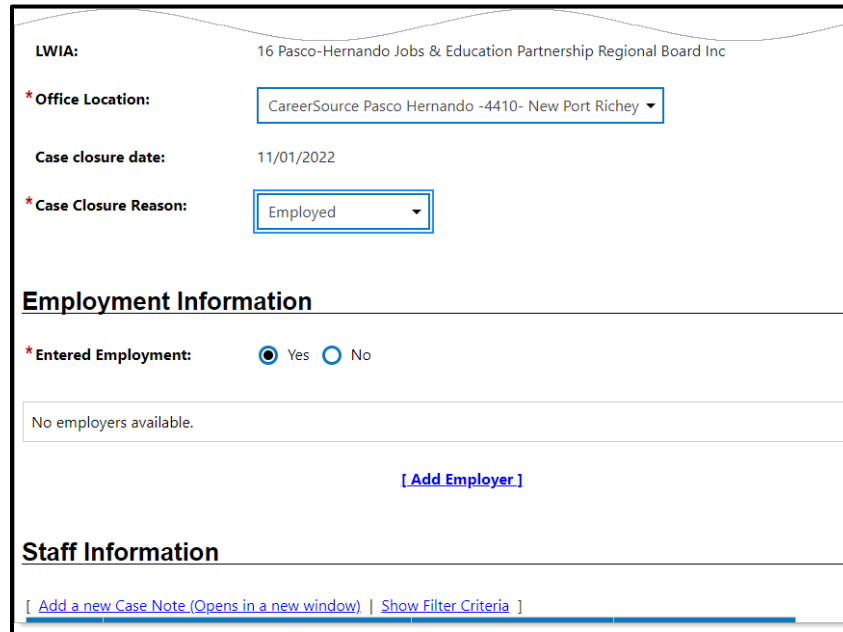
Note: Because the IEP is a shared commodity among all program staff, please follow agency policy when closing the plan.

To close an IEP for the assisted individual:

1. Click the **Edit** link in the Action column. The Plan tab of the IEP displays.
2. Ensure all Objectives and Goals are already closed by visiting those tabs.
3. On the Plan tab, in the Plan Information section, enter the **date** the plan closed on in the Plan closed on field.
4. Click **Next** to move through the remaining tabs.
5. Click **Finish** on the Services tab. The Plan tab of the Case Management Profile redisplay with the plan status showing as **CLOSED**.

Creating a Closure Record

1. Click the **plus sign icon**  to expand the Closure ribbon.
2. Click the **Create Closure** link. If all activities are properly closed, the General Info tab of the Choices Closure form displays.



The screenshot shows the 'General Info' tab of the Choices Closure form. The fields are as follows:

- LWIA:** 16 Pasco-Hernando Jobs & Education Partnership Regional Board Inc
- * Office Location:** CareerSource Pasco Hernando -4410- New Port Richey
- Case closure date:** 11/01/2022
- * Case Closure Reason:** Employed

Below these fields is the **Employment Information** section, which includes:

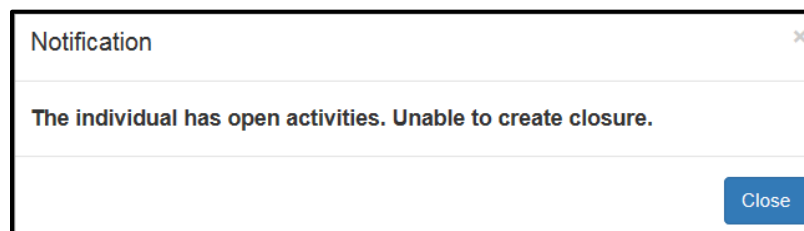
- * Entered Employment:** Yes No
- No employers available.
- [\[Add Employer \]](#)

At the bottom is the **Staff Information** section, which includes:

- [\[Add a new Case Note \(Opens in a new window\) \]](#) | [Show Filter Criteria](#)

Closure Form

If there are any open activities or Employment Plan goals/objectives, a warning message displays, and you must close them before you can continue (see figure below).



The screenshot shows a notification message box with the following content:

Notification x

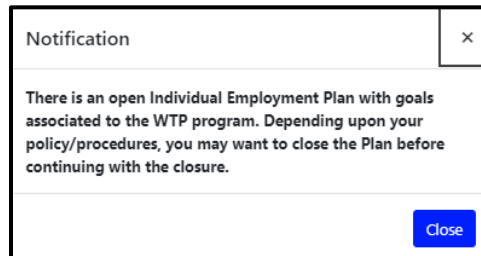
The individual has open activities. Unable to create closure.

[Close](#)

Unable to Create Closure Notification

To continue, staff must click Close to clear the notification, and then make sure that all open activities have been closed.

Similarly, if the IEP, its goals, and/or its objectives remain open, the system will display the following notification window:



Open IEP Notification Window

Note: The read-only **Case closure date** is based on the latest Last Activity Date for a program service, or if unavailable, the Participation Date.

3. In the General Information section, select your **Office Location**, if necessary.
4. Select a **Case Closure Reason**.
5. In the Employment Information section, specify if the participant **Entered Employment** while active in the program.
 - i. If **No**, you can enter a case note or change case manager assignment in the Staff Information section, or simply skip to the final step to save the Closure form.
 - ii. If **Yes**, you must enter or select pre-existing employer/job data; continue with step 6.
6. To add employment, click the **Add Employer** link. The Add Employer page displays (see figure below).

Use this form to create or edit a new Employer.

Add/Edit Employer

Employer Information

[Search Individual Employment History](#) [Select from Internal Job Order/Placement](#)

* Employer Name:

Verify Employer Name: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Employer FEIN:

* State Tax ID:

Address Line 1:

Address Line 2:

City:

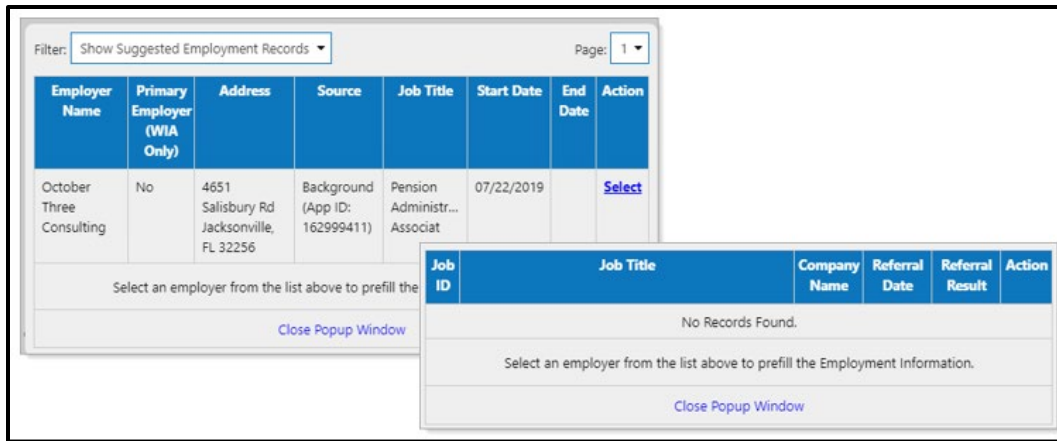
State/Province:

County/Borough/Parish:

Add Employer Page for Closure Form

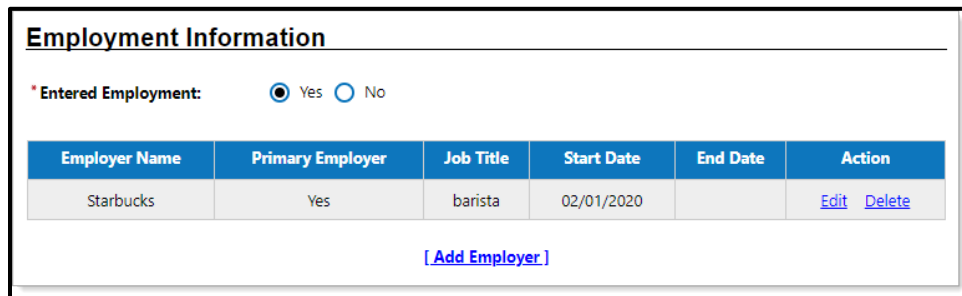
- i. Enter the Employer Information and Job Information, taking note of the required fields marked with a red asterisk.
- ii. If any employment history or internal job placements were previously entered as part of the individual's Employment Plan or activities or application for a program, you can use the links at the top of the Add/Edit Employer section, **Search Individual Employment History** or **Select from Internal Job Order/Placement** (see figure above), to prefill the employment information. Selecting either link will

display a pop-up window where you can select an employment record (see figure below).



Search Individual Employment History and Select from Internal Job Order/Placement Pop-ups

- iii. Click the **Save** button. The Closure form redisplay, with the entered employment listed (as shown below).



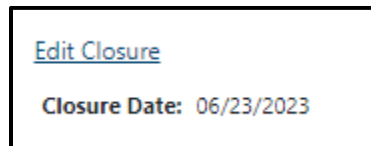
Closure Form with Entered Employment Information

- 7. To add a case note, click the **Add a new Case Note** link.
- 8. To make case assignment changes, click any of the links for **Assign Case Manager**, **Assign Me**, or **Remove Case Manager Assignment**.

9. To complete the Closure form, click the **Save** button. The Programs tab redisplay, with the closure link changed to **Edit Closure**, along with the Closure Date.

Deleting a Case Closure

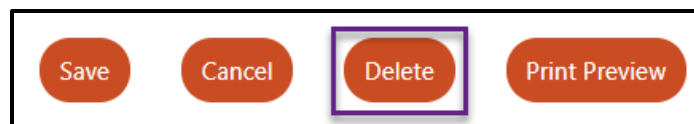
Upon successfully completing the Choices Case Closure form, the system displays the updated Closure ribbon, a sample of which follows:



Edit Closure Link

To delete this record, staff selects the **Edit Closure** link. The **Delete** button is only available to authorized staff once you have saved this form. By deleting the form, the individual may continue to receive Choices services for the current enrollment period.

To delete this record, staff selects the Delete button.



Delete Button at bottom of Closure Form

In response, the system will display a notification window to confirm your intention. To remove the message, click OK.

Choices Exit / Outcome Ribbon

After completing this module, you will be able to:



- understand the difference between **case closure** and **case exit/outcome**.
- understand the global exclusion types that define an exit/outcome, and how a Choices case is identified when an exit form is completed.
- understand the unique circumstances in which you can perform a manual exit.
- successfully complete the Exit/Outcome Form.
- understand how to delete an Exit/Outcome form if necessary.

According to USDOL guidelines, staff need only create a Choices Exit / Outcome (aka, hard exit) if the individual satisfies one of the established global exclusions. Otherwise, staff need not complete the Exit / Outcome form to initiate the individual's soft exit from the Choices program. The system will automatically exit the customer from the program as a soft exit when the individual has not received a program service for 90 consecutive days.

The WIT system is configured to execute the Combined Soft Exit procedure if the customer is co-enrolled in two (or more) federal programs simultaneously, including WP, WIOA, SNAP E&T, Choices, and TAA. This means the customer is an active program participant until staff enters actual end dates for all program services.

To manually terminate the individual’s participation in the Choices program (i.e., create a hard exit), perform the following steps:

Select the **Create Exit/Outcome** link from the **Exit/Outcome** ribbon. The **Outcome** page displays (see figure below).

Outcome General Information	
User ID:	30032
Name:	Grace Hernandez
* LWDB/Region:	Dallas WF Board
* Office Location:	939 WF SOL Dallas Pleasant Grove ▾
* Staff Position:	Staff ▾
Outcome Exit Information	
* Exit Date:	06/28/2023  Today
* Exit Reason:	None Selected ▾
Exit Reason Description:	<input type="text"/>
Alternate Contacts:	Add Alternate Contacts 

Exit / Outcome Form

1. Enter the **Exit** date (mm/dd/yyyy).
2. Select **Exit Reason**, from the drop-down menu.
3. If applicable, enter an exit reason description.
4. Select the **Save** button.

Note: Because the WIT system is configured to execute Combined Soft Exits, creating a hard exit for one program will trigger the system to automatically close all other programs for which the customer is co-enrolled. This includes TAA, Wagner-Peyser, SNAP E&T, and/or WIOA.

Deleting Choices Outcomes

Upon successfully completing the **Choices Exit / Outcome** form, the system displays the updated ribbon, a sample of which follows:

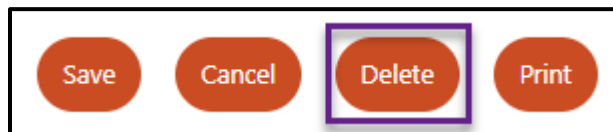
Edit Exit/Outcome	
Exit Date: 07/13/2023	Exit Reason: Health/Medical

Edit Exit / Outcome Link

To delete this record, staff selects the **Edit Exit / Outcome** link. The **Delete** button is only available to authorized staff once the form has been saved. By deleting the form, the individual will return to their previous status, whether that was counting down towards the soft exit procedure or continuing to receive program services.

Note: If the customer was co-enrolled in any of these programs – TAA, Wagner-Peyser, SNAP E&T, and/or WIOA – the system will also delete the exit / outcome form for the respective program(s).

To delete this record, staff selects the **Delete** button.



Delete Button at bottom of Exit / Outcome Form

In response, the system will display a notification window to confirm your intention. To remove the message, click **OK**.