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Choices Sanctions Desk Aid

1. From menu, select **Manage Individuals**.

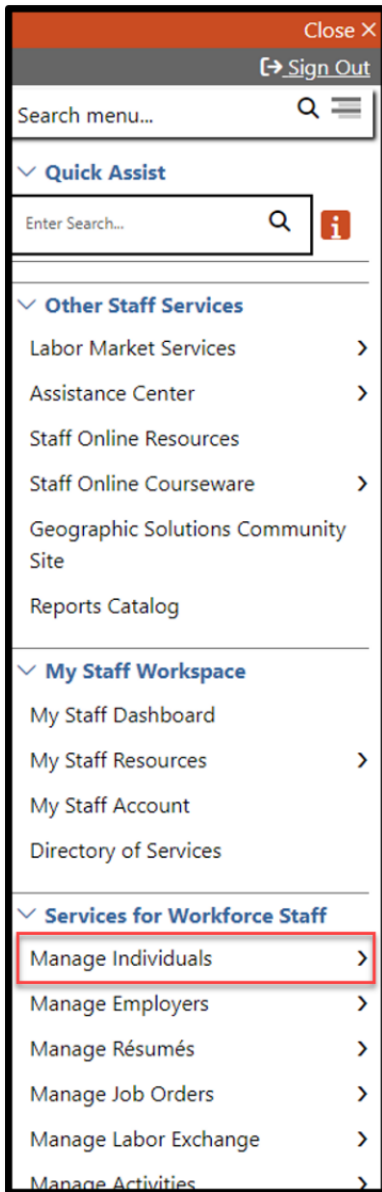


Figure 1 Screenshot showing Manage Individuals

2. Select **Assist an Individual**.

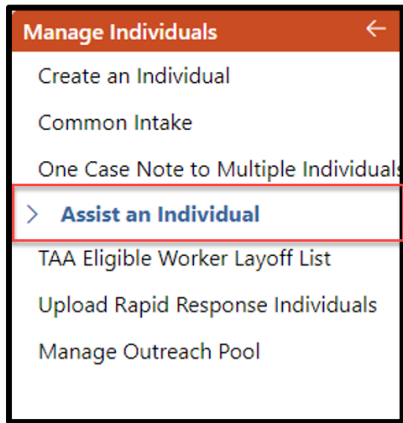


Figure 2 Screenshot showing Assist an Individual

You can find recently assisted customers in **Quick Assist**, or you may search for a new customer by entering information in the **General Criteria** section and click **Search**.

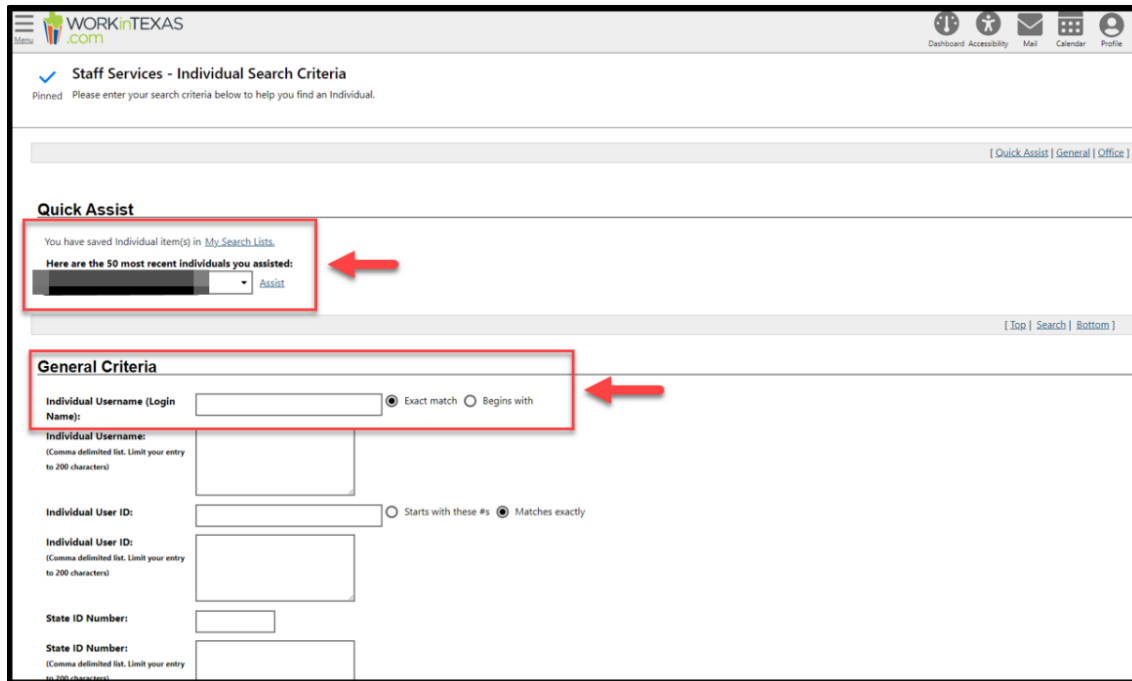


Figure 3: Screenshot Showing Quick Assist, General Criteria and Search

3. Select **Programs** under the Case Management Profile section.

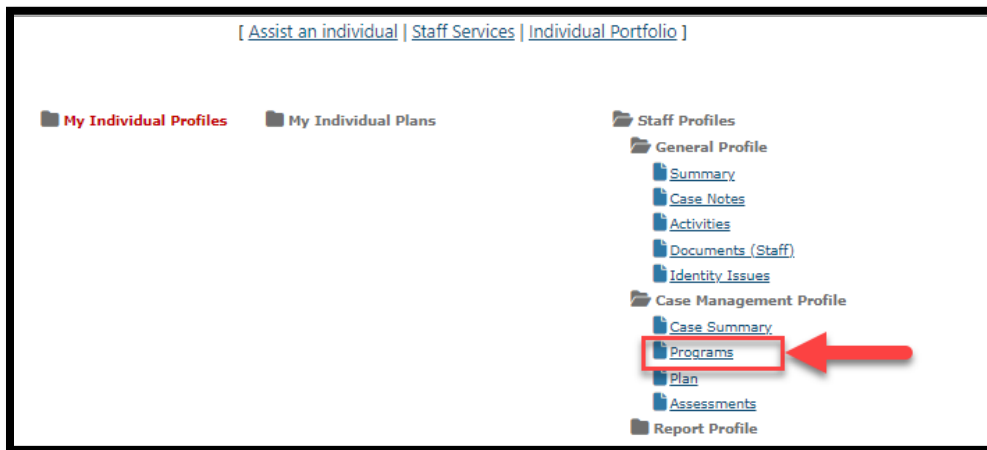


Figure 4: Screenshot showing Programs under Case Management Profile

4. Navigate to the Choices ribbon and click the plus sign icon to expand.



Figure 5: Screenshot Showing How to Expand the Choices Ribbon

5. Click the plus sign icon to expand the Sanctions Ribbon.



Figure 6: Screenshot Showing the Sanctions Ribbon

6. Click on **Create Sanction Referral**.

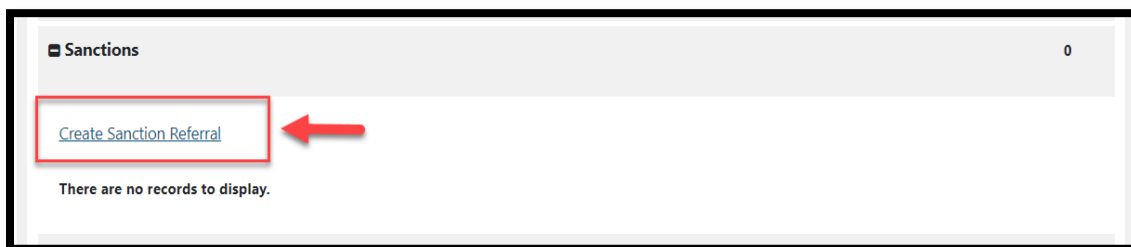


Figure 7: Screenshot Showing the Create Sanctions Referral Link

7. The sanctions page will display. Verify that the correct **LWIA/Region** and **Office Location** selections are accurate. If not, change them accordingly.

The screenshot shows a web form with two main sections. The top section contains two fields: '* LWIA/Region:' with a dropdown menu currently set to 'None Selected', and '* Office Location:' with a text input field containing 'Select an LWIA/Region'. Red arrows point to both of these fields. Below this is a section titled 'Sanction Referral' which contains three fields: '* Referral Reason:' with a dropdown menu set to 'None Selected', '* Non-Cooperation / Cooperation Date:' with a text input field and a 'Today' button, and 'Comments:' with a large text area.

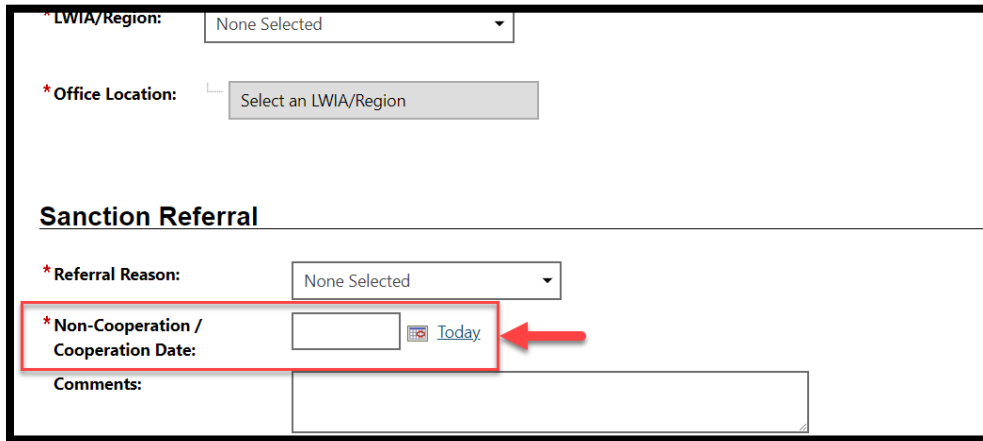
Figure 8: Screenshot showing the LWIA/Region and Office Location

8. For **Referral Reason**, select appropriate reason from the drop-down menu.

This screenshot is similar to Figure 8 but shows the '* Referral Reason:' dropdown menu open. The menu lists several options: 'None Selected', '4-Failed to participate', '5-Failed to respond to outreach', '9-Cooperating Program Month', and '10-Cooperating 4 weeks'. A red arrow points to the dropdown menu. The other fields in the form, including the 'Office Location' and 'Comments' fields, are visible but not the focus of this specific step.

Figure 9: Screenshot Showing Sanction Referral Dropdown

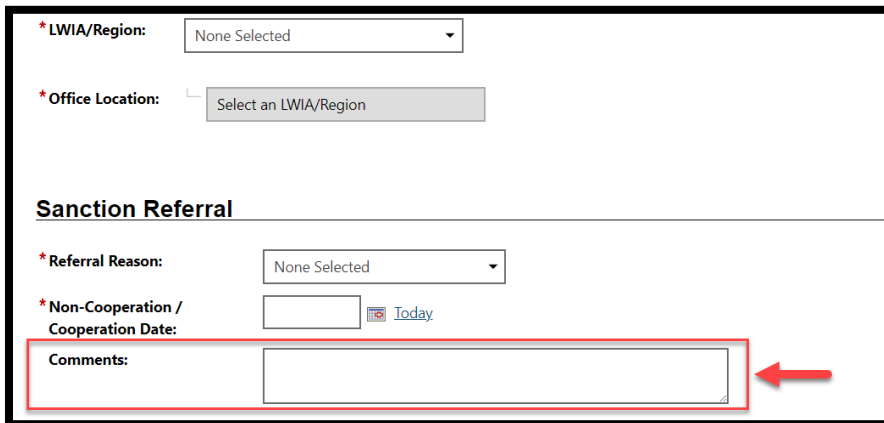
9. For **Non-Cooperation Date**, select the appropriate date.



The screenshot shows a form with the following fields: "LWIA/Region:" with a dropdown menu set to "None Selected"; "* Office Location:" with a text input field containing "Select an LWIA/Region"; a section header "Sanction Referral"; "* Referral Reason:" with a dropdown menu set to "None Selected"; "* Non-Cooperation / Cooperation Date:" with a date picker and a "Today" button, which is highlighted with a red box and a red arrow; and "Comments:" with a text area.

Figure 10: Screenshot of Non-Cooperation Date field

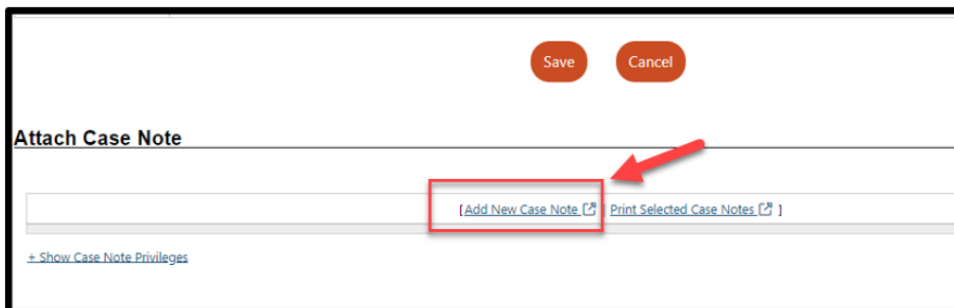
10. If applicable, add **Comments**.



The screenshot shows the same form as Figure 10, but with the "Comments:" text area highlighted by a red box and a red arrow pointing to it.

Figure 11: Screenshot Showing Comments Field

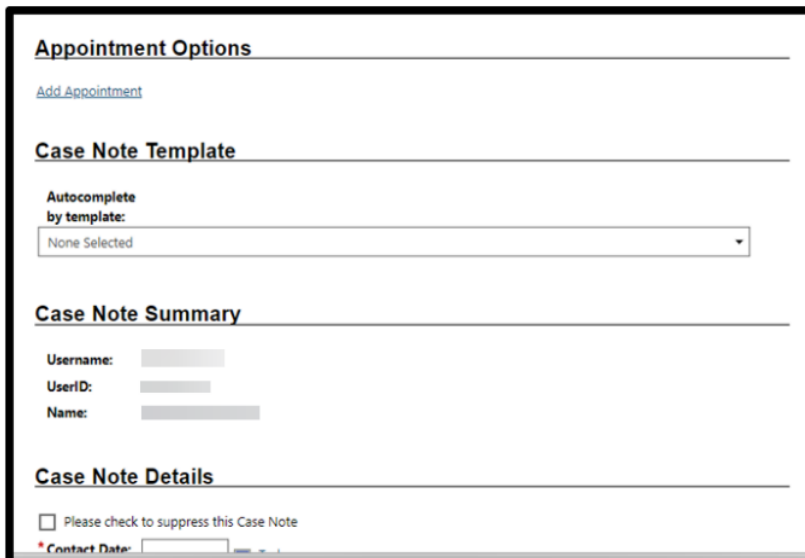
11. Add case note by clicking on **Add New Case Note**.



The screenshot shows a form with "Save" and "Cancel" buttons at the top. Below them is a section header "Attach Case Note". Underneath is a horizontal bar containing two links: "[Add New Case Note [?]]" and "[Print Selected Case Notes [?]]". The "Add New Case Note" link is highlighted with a red box and a red arrow. At the bottom left, there is a link "+ Show Case Note Privileges".

Figure 12: Screenshot Showing Add Case Note Link

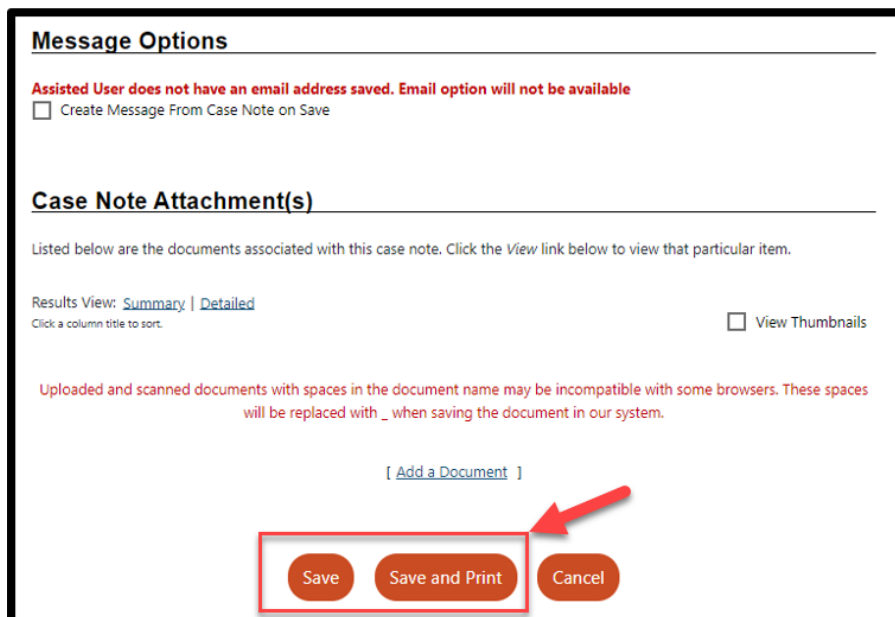
- The case note pop-out box will appear. Enter case note details and attach any necessary documents.



The screenshot shows a web form titled "Case Note Screen". It is divided into four main sections: "Appointment Options" with a link "Add Appointment"; "Case Note Template" with a dropdown menu labeled "Autocomplete by template:" and "None Selected"; "Case Note Summary" with input fields for "Username:", "UserID:", and "Name:"; and "Case Note Details" with a checkbox "Please check to suppress this Case Note" and a "Contact Date:" field.

Figure 13: Screenshot of Case Note Screen

- Select the **Save (or Save and Print)** button.



The screenshot shows a web form titled "Message Options". It includes a red warning message: "Assisted User does not have an email address saved. Email option will not be available" and a checkbox "Create Message From Case Note on Save". Below is the "Case Note Attachment(s)" section, which lists associated documents and includes a "View" link. There are also "Results View" options for "Summary" and "Detailed", and a "View Thumbnails" checkbox. A red arrow points to the "Save and Print" button in the bottom navigation bar, which also contains "Save" and "Cancel" buttons.

Figure 14: Screenshot of Message Options Save or Save and Print

14. The Case Note table appears.

App ID	Subject	Contact Date	Create Date	Staff User	LWDB	Office	Program	Source / ID	Message Created	Action
0	Schedule Event - 02/11/2024	3/11/2024	3/6/2024	[REDACTED]	26	240		Application-NA	NA	edit delete send user message

Figure 15: Screenshot of Case Note Table

15. To view the sanction referral, click on **Programs**.

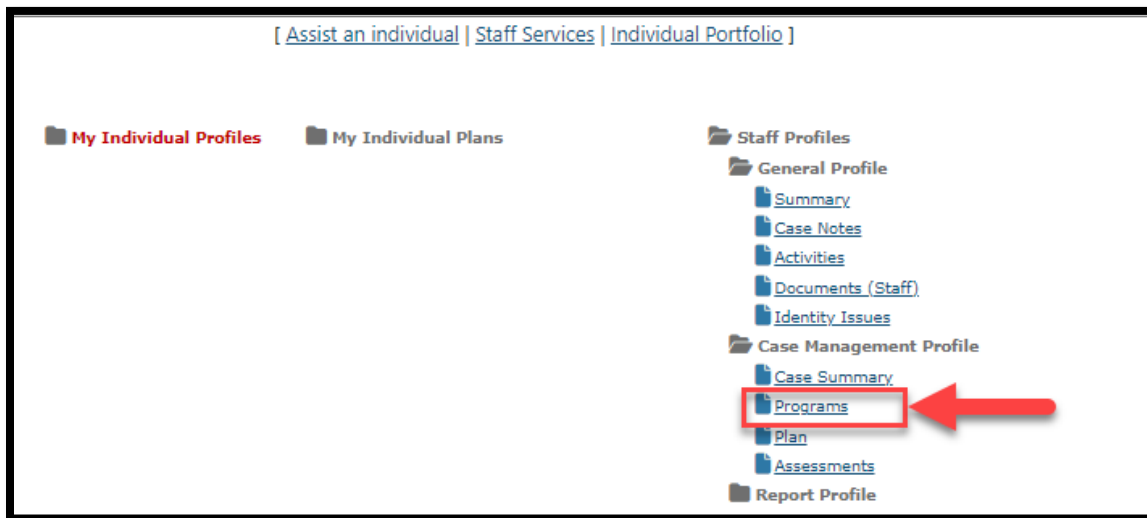


Figure 16: Screenshot of the Link to Programs

16. Navigate to the Choices ribbon and click the plus sign icon to expand.



Figure 17: Screenshot Showing How to Expand the Choices Ribbon

- Click on the plus sign on the Sanctions Ribbon to see the sanctions table.



Figure 18: Screenshot Showing the Sanctions Ribbon

- The sanctions table appears with the sanction information.

A screenshot of the 'Sanctions' table. The table has a search bar and a 'Create Sanction Referral' link. The table contains one row of data. The columns are: Create Date, Create Staff, Date Sent to HHSC, Referral Reason, Non-Cooperation Date, Referral Status, HHSC Response, HHSC Response Date, Adverse Action Date, HHSC Good Cause Reason, Rejection Reason, Day Counter, and Action.

Create Date	Create Staff	Date Sent to HHSC	Referral Reason	Non-Cooperation Date	Referral Status	HHSC Response	HHSC Response Date	Adverse Action Date	HHSC Good Cause Reason	Rejection Reason	Day Counter	Action
06/28/2023			Failed to participate	06/28/2023	Pending HHSC Response						0	Edit

Figure 19: Screenshot Showing Sanctions Table

How to View the HHSC Determination

1. From the menu, select **Manage Individuals**.

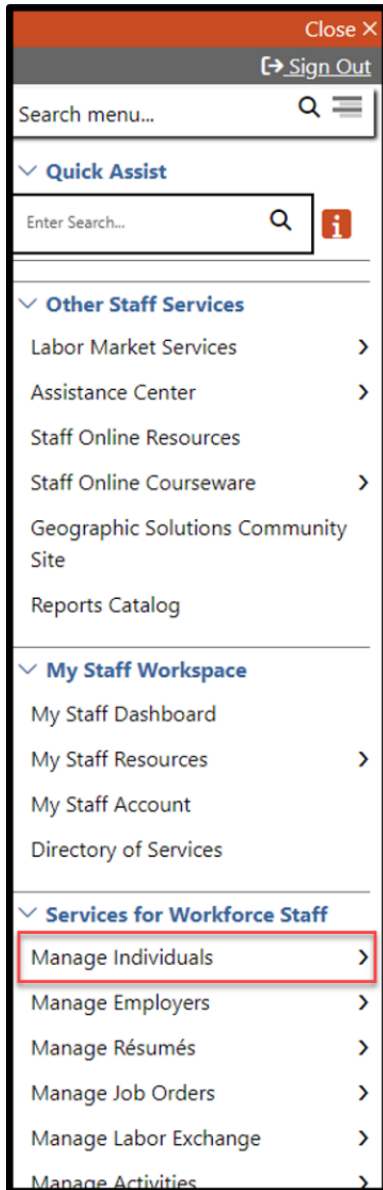


Figure 20: Screenshot showing Manage Individuals

2. Select **Assist an Individual**.

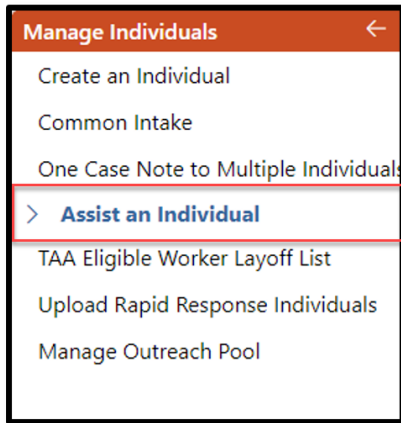


Figure 21: Screenshot showing Assist an Individual

3. Navigate to the Choices ribbon and click the plus sign icon to expand.



Figure 22: Screenshot Showing How to Expand the Choices Ribbon

4. Click the plus sign icon to expand the Sanctions Ribbon.



Figure 23: Screenshot Showing the Sanctions Ribbon

5. Scroll down to the **HHSC Response** section.

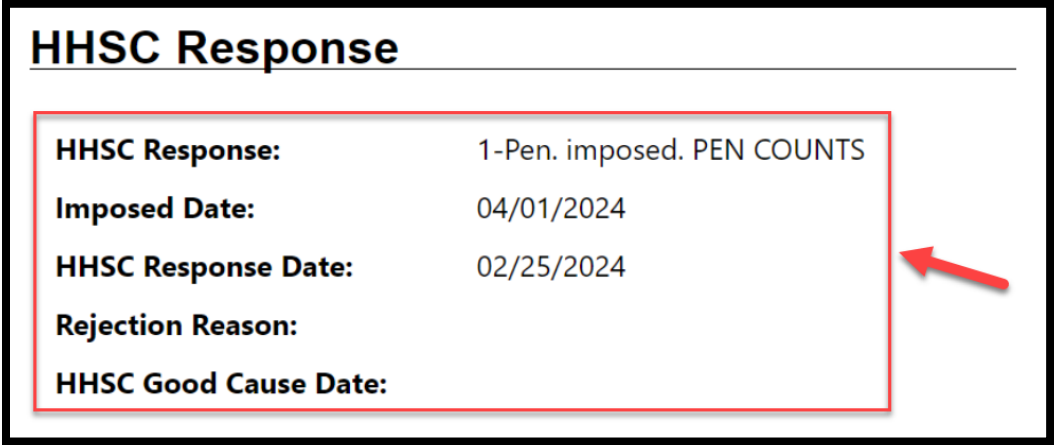


Figure 24: Screenshot of HHSC Response