

Workforce Case Management System September Update

Introduction

The Workforce Case Management System (WF CMS) replacement project is a long-term project to replace The Workforce Information System of Texas (TWIST). It is important that throughout the project we provide information to Local Workforce Development Area Board staff and service provider staff. To ensure consistency of information, we will provide written information.

At the beginning of this project, we asked for a representative and a back-up from each of the Board quartiles. These Board representatives are included in as many project meetings as possible. They have assisted in the review of system requirements and determination of whether the new WF CMS meets the requirement, or a gap exists. Board reps have also assisted in functional design meetings to help determine actual screen layout and terminology.

For this project, we took the lessons learned from WorkInTexas (WIT) replacement and established guiding principles. As guiding principles, we committed to buying a configurable-off-the-shelf product and would avoid customizing unless needed to comply with state or federal mandates.

While not customizing, we are taking full advantage of the configuration possibilities of the system. This is an area where input from our Board representatives has been immensely helpful.

Document Storage

WF CMS will have document upload, storage, and retrieval capabilities. TWC is aware many Boards have purchased or are leasing their own document file system. TWC will not mandate Boards cancel theirs and use the functionality in WF CMS. However, there is interest that when Board's contracts end, Boards are encouraged to switch to WF CMS.

Documents may also be uploaded or otherwise attached to program elements used to confirm eligibility in WF CMS. In addition, documents can be uploaded to verify class attendance, completion of training or certificate achievement, or appropriate use of support services.

A key benefit for using the document capabilities of the WF CMS, once this system has been implemented, Subrecipient Monitoring will pull documents on their audit sample from WF CMS. As a result, for documents stored in WF CMS, there will no longer be a need to upload documents to SharePoint.

Workflow Capabilities

The system also has workflow capabilities. Local areas will be able to set certain reminders or processes that will apply to all staff. In addition, staff will be able to set their own reminders to help them remember when certain actions are necessary. Alerts can be sent by program WIOA, Choices, SNAP, Trade, etc. Alerts may also be designated for the recipient type—individual, employer, staff, etc. and can work as an internal message, email, or text message.

Non-formula Funding Grant Tracking

Another function of the new system will be the ability to track projects from other funding Boards receive, as well as TWC direct grantees' projects. TWC was not usually able to accommodate a Board's request for a special funding code in TWIST to track non-formula funding. Also, there is no automated way for grantees to track customers and services provided through TWC grants. Boards and other direct grantees used a variety of methods to track projects.

This system has the capability to track Board's non-formula funded projects and direct grantee projects. Boards and grantees will be able to establish projects and enter customers and track services through WF CMS. There are two methods to track these projects—agency defined programs and non-WIOA programs. One method—the non-WIOA programs will provide more reporting capabilities than using the agency defined programs method.

Offices

TWIST had the capacity for office levels 3, 4, and 5. There was no specific guidance on how the office levels were to be used. As a result, Boards were creative and used the office levels to compensate for certain inabilities of TWIST. Office levels were used not only to designate brick and mortar office locations where services were delivered, but also to track service provider performance, special events such as job fairs and rapid response, and itinerant service delivery points. There are over 6000 offices in TWIST. We will not convert office levels 3, 4, and 5. Based on information provided by Boards, we have identified the offices that will be migrated or converted to the new WF CMS.

The Virtual One-Stop (VOS) WF CMS can identify non-Eligible Training (ET) providers for each service provided. In addition, WF CMS can track specific events.

For go-live, TWC will establish one non-ET provider for each LWDA, and all TWIST data will be converted to the default provider. Boards will be able to

establish as many providers as appropriate after go-live, including their primary workforce services provider—for the Workforce Solutions Offices.

Permissions/Roles

TWC, working with the project Board reps will establish potential privilege groups for various levels and types of staff. The privilege groups will be based on common roles and permissions needed. For example, privilege groups may be established for case management staff, local management staff, local monitors, state monitors, and state board service strategies staff. Privilege groups will have access to specific functionality in the WF CMS and will be designated for read only, edit, and/or delete permissions. Work In Texas already uses this permissions/role configuration.

Universal Employment Plan

Go-live of WF CMS provides an opportunity to establish a standard or universal employment plan (EP) to be used by all programs and in all LWDA across the state. Use of the EP in the WF CMS will ensure access to all areas in the event a customer moves to another LWDA. Having the EP in the WF CMS will also assist with monitoring purposes. This will eliminate the need to locate and provide paper copies of employment plans for local monitors and state/federal monitors. An added benefit is the ability for the customer to access the EP through WIT for review of next steps on their action plan.

Optional Questions

TWIST allows for optional questions to be established by each Board. The WF CMS does not provide for the use of optional questions. In reviewing the optional questions in TWIST, in the vast majority of instances the capabilities of WF CMS will compensate for the lack of the optional questions.

Consideration of Change to the DINT Process

For almost the entire time TWIST has been operational, we have had a data entry deadline of Quarter plus 20 days (Q+20). We expect to continue Q+20 in the new WF CMS. Certain fields/elements of TWIST are locked after Q+20. Policy allows for edits to certain information after Q+20. These edits are accomplished through the Data Integrity (DINT) process. The current DINT process has multiple steps and is cumbersome and time consuming. TWC is considering possible changes to the DINT process to make it more efficient.

Need for Testers

As the project moves forward, there will be instances in which we need to perform various testing tasks to evaluate that the WF CMS is functioning as designed. Our experience indicates that testing is best performed by staff who actually perform the functions to be tested. The Board reps who have been working on the project have agreed to be part of the testing team, but

we will be reaching out to Boards to solicit additional staff to assist with testing.