

## **SAMPLE COMPREHENSIVE NARRATIVE ENTRIES FOR TWIST COUNSELOR NOTES**

The following case scenarios show comprehensive narrative entries—case details and services provided—for The Workforce Information System of Texas (TWIST) *Counselor Notes*.

TWIST *Counselor Notes* must include the following types of information in the narrative, *as applicable*: title (a descriptive subject entry accurately reflecting the contents); who (customer's name, employer's name, etc.); what (activity being reported); when (the date the activity was reported); where (customer's work/school location, etc.); why (to verify or document service activities); and how (customer called, case manager called, etc.).

### **SCENARIO 1: WORKFORCE INVESTMENT ACT YOUTH IN TUTORING**

In September, a Workforce Investment Act (WIA) youth, Joe Brown, informed his case manager that he was failing math. The case manager located a local businessperson available as a math tutor.

#### ***Action/Documentation***

The case manager enters:

- TWIST service code 72–*Tutoring/Study Skills Instructions*; and
- the following comprehensive narrative into TWIST *Counselor Notes*:

*Tutoring. September 15, Joe is failing math with a grade of 62. John Smith, owner of Smith Investments, has agreed to tutor Joe on a weekly basis at his business location.*

Joe continues to participate in the program; during the October contact, the case manager asks Joe about the progress of the tutoring.

#### ***Action/Documentation***

If the tutoring is continuing, the case manager enters:

- TWIST service code 72–*Tutoring/Study Skills Instructions* for the October service activity; and
- the following comprehensive narrative into TWIST *Counselor Notes*:

*Tutoring. October 3, Joe is still working with his tutor, John Smith, and his math grade has improved from 62 to 68, as reported by his math teacher, Peggy Johns.*

## **SCENARIO 2: WIA ADULT SEEKING EMPLOYMENT FOLLOWING TRAINING**

Jennifer Williams received WIA adult-funded occupational training. In May, she graduated as a registered nurse and passed the state licensing exam. Jennifer is working with her case manager to find employment.

On June 12, the case manager provided Jennifer with four job referrals. The referrals were posted in WorkInTexas.com.

### ***Action/Documentation***

The case manager enters:

- TWIST service code *12–Job Search Assistance* for 6/12; and
- the following comprehensive narrative into TWIST *Counselor Notes*:

*Job Search Assistance. Met with Jennifer and provided her with four job referrals, which were posted in WorkInTexas.com.*

On June 29, Jennifer returned to the Workforce Solutions Office and informed the case manager that she did not get any of the four jobs. The case manager provides Jennifer with six more job referrals and posts them in WorkInTexas.com.

### ***Action/Documentation***

The case manager enters:

- TWIST service code *12–Job Search Assistance* for 6/29; and
- the following comprehensive narrative into TWIST *Counselor Notes*:

*Job Search Assistance. On June 29, Jennifer reports not being hired by any of the four previous referrals. Provided Jennifer with six more job referrals, which were posted in WorkInTexas.com. Advised Jennifer to let me know if she is hired or if she needs further assistance.*

On July 9, Jennifer returned to the office and informed her case manager she did not get any of the six jobs. The case manager suggested that Jennifer might benefit from attending the Mock Interviews Workshop at the Workforce Solutions Office. Jennifer was scheduled for the next available workshop.

### ***Action/Documentation***

The case manager enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Mock Interviews Workshop. July 9, Jennifer has gone on numerous interviews but is having difficulty getting hired. Scheduled Jennifer for the Mock Interviews Workshop on July 18.*

On July 18, Jennifer attended the workshop.

***Action/Documentation***

The case manager enters TWIST service code 38—*Job Readiness/Employment Skills*.

**SCENARIO 3: CHOICES—ESTABLISHMENT OF SELF-EMPLOYMENT**

On September 19, Mr. Andrews, a Choices customer, appears for his scheduled appointment and reports that he is starting his own business.

During the appointment, the case manager:

- reviews the documentation requirements (i.e., federal tax forms, property title, deed, business accounts, business records, or a business plan) with Mr. Andrews, and Mr. Andrews provides one of the required documents to verify that he is establishing a self-employment enterprise;
- reviews the reporting requirements for income (i.e., invoices or copies of checks) and expenses (receipts) for self-employment activity with Mr. Andrews;
- informs Mr. Andrews of any additional services available (work-related expenses, support services, etc.); and
- schedules the next appointment date.

***Action/Documentation***

The case manager enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Establishment of Self-Employment. On September 19, Mr. Andrews reported that he is starting a mechanics business. Reviewed self-employment documentation requirements and Mr. Andrews provided a business plan. The name of his business is Andrews Mechanic Services located at 123 Workforce Street, Austin, TX 78701.*

*Reviewed reporting requirements for income and expenses for self-employment. Mr. Andrews states that he understands the reporting requirements and has already developed invoices for his business. Mr. Andrews states that he understands and will ensure his invoices include all required information. Mr. Andrews states that he understands and requests work-related expenses for the tools needed to start his business. Next appointment is Wednesday, September 26.*

## **SCENARIO 4: SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM EMPLOYMENT AND TRAINING RETENTION**

On September 19, Mr. Wilson, a Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T) participant, contacts his case manager and reports that he has found employment. The case manager discusses the availability of job retention services, issues transportation support, and reports his employment to the Texas Health and Human Services Commission (HHSC).

### ***Action/Documentation***

The case manager:

- opens TWIST service code 39–*Unsubsidized Employment/Employment Entry* with sub-fund 44–*SNAP E&T Job Retention* for employment and job retention services;
- enters TWIST service code 203–*Transportation Services* for 9/19;
- enters support services of \$40 for transportation assistance on the *Support Services* tab in TWIST under *Fund 87–SNAP E&T ABAWD*, sub-fund 44–*SNAP E&T Job Retention* for 9/19–9/25;
- enters reconsideration for employment in TWIST under *Good Cause* tab;
- completes and faxes HHSC Form H1817 to HHSC and places a copy in case file; and
- enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Employment and Job Retention Services. September 19, 2012, Mr. Wilson reported that he found a job at Austin Independent School District. He will be employed full time—40 hours per week. HHSC Form H1817 was completed and faxed to HHSC and a copy placed in the case file. Reconsideration was updated in TWIST under the Good Cause tab for employment. Service 39 was opened in TWIST with sub-fund 44 for employment and job retention services. Transportation was issued, \$40 to cover 9/19 to 9/25. Transportation was updated in the Support Services tab with sub-fund 44.*

Because a job retention service was provided to Mr. Wilson, the case manager updates the *Program Detail* with a notation in TWIST *Counselor Notes*. All SNAP E&T cases that report full-time employment must remain open.

### ***Action/Documentation***

The case manager:

- updates the TWIST *Program Detail* for October 5, 2012, for issuance of transportation services; and
- enters the following comprehensive narrative into TWIST *Counselor Notes*:

*October 5, 2012, Job Retention Services Request Date located in the Program Detail has been updated with today's date because transportation services have been issued. Program Detail will remain open for 90 days.*

## **SCENARIO 5: TRADE ADJUSTMENT ASSISTANCE BENCHMARK REVIEW AND FAILURE**

Under Trade Adjustment Assistance (TAA) regulations, participants are required to contact their case manager for a benchmark review to monitor their progress in completing training; ensure that they are maintaining satisfactory academic standing; and determine eligibility for Trade Readjustment Allowances. Boards must make contact with customers on a monthly basis.

On January 15, TAA customer, Ms. Jones, contacted her case manager for a benchmark review after a semester of study.

### ***Action/Documentation***

The case manager enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Benchmark Review & Failure (1st). On January 15, Ms. Jones came to the Workforce Solutions Office for her 30-day benchmark review. She just completed her first semester (fall 2012) at Texas Community College and provided an unofficial transcript reflecting grades and full-time status (12 hrs.) during this semester:*

*English Lit 3201 - D*

*Political Science 3101 - C*

*Intro to Algebra 3101 - D*

*Art Appreciation 3202 - C*

*Ms. Jones has been placed on scholastic probation and is in danger of not completing training within the Reemployment and Training Plan (REP)–scheduled time frame. I issued a benchmark failure (1st warning), and advised her to consider use of campus tutoring services next semester. Ms. Jones was advised that she must provide evidence of progress in restoring academic standing at her next review appointment or the REP will need to be amended to reflect changes that may include occupational goal adjustment or a recommendation for termination of training. The next benchmark review is scheduled for February 15. Ms. Jones was reminded to register for spring semester courses as stipulated in her REP, or secure my approval prior to any changes.*