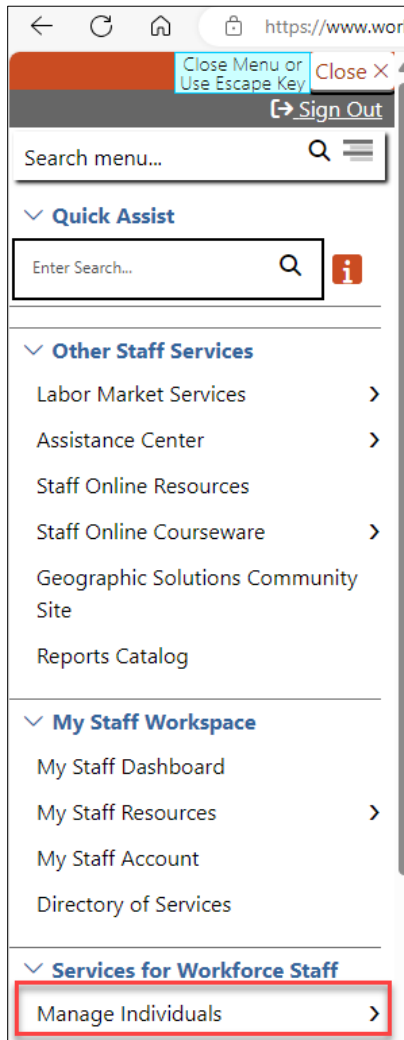


# **WorkInTexas**

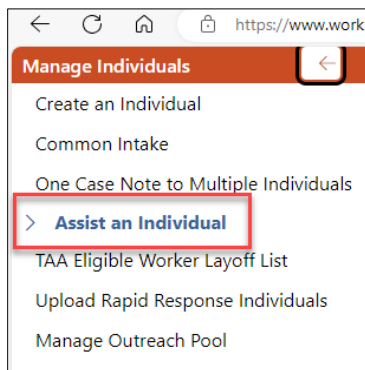
## **TANF Youth Initiative**

### **Desk Aid**

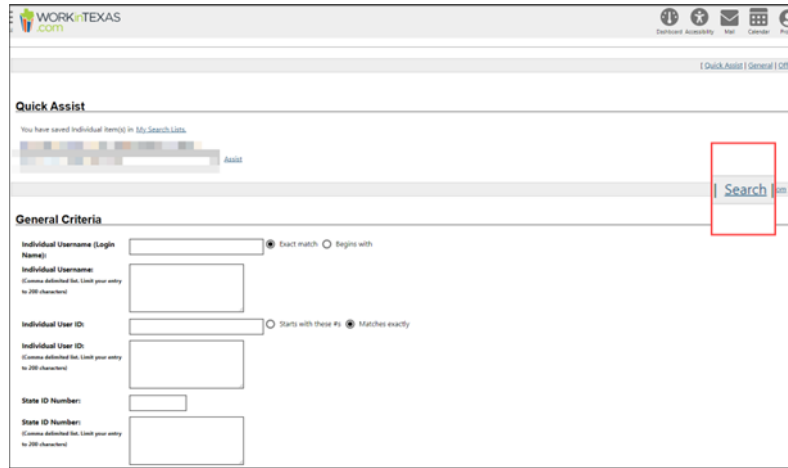
1. From menu, select **Manage Individuals** (\*please note you must have an active, complete Wagner-Peyser application in WorkInTexas.com for the participant):



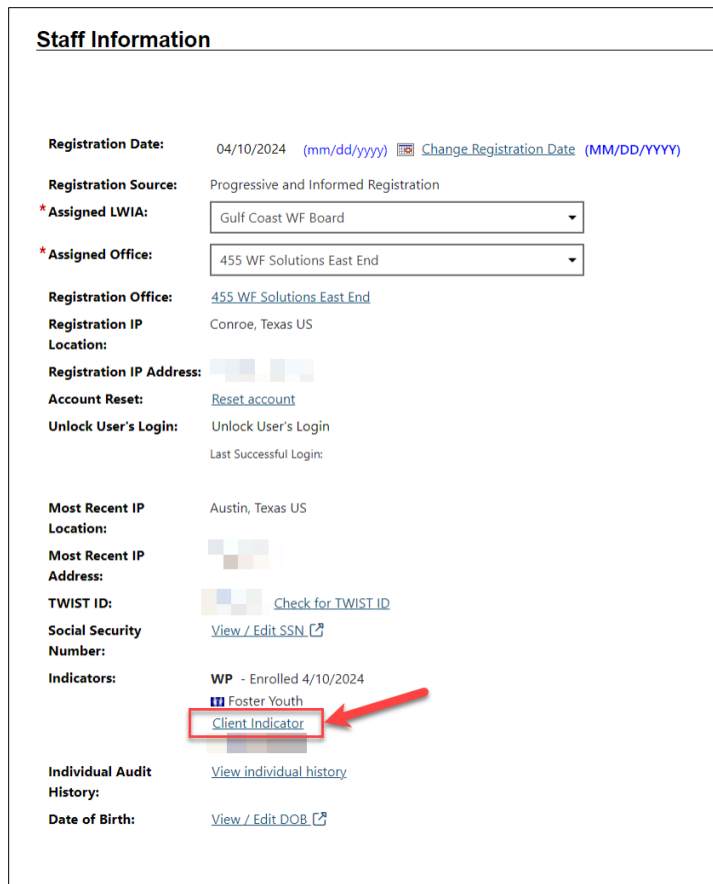
2. Select **Assist an Individual**:



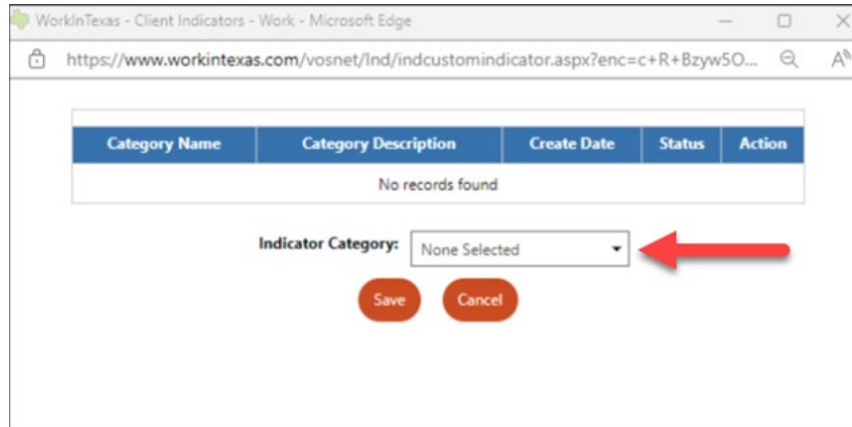
3. You can find recently assisted customers in Quick Assist, or you may search for a new customer by entering information in the General Criteria section and click **Search**.



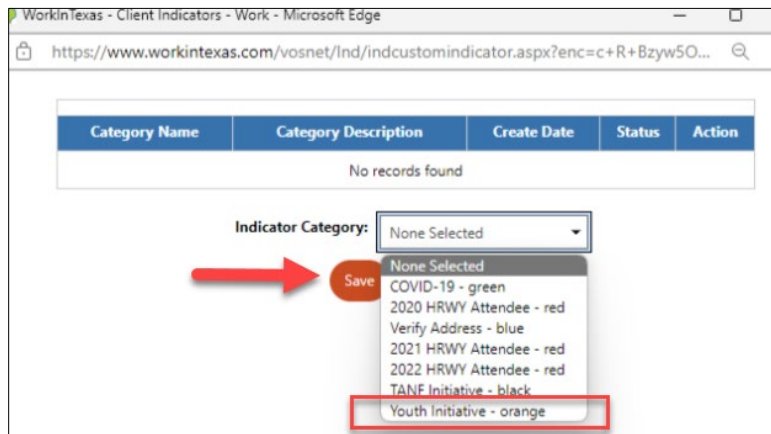
4. The next screen is the customer's General Information, and here is where you will find the Client Indicator for the Statewide Initiatives. Click on **Client Indicator**:



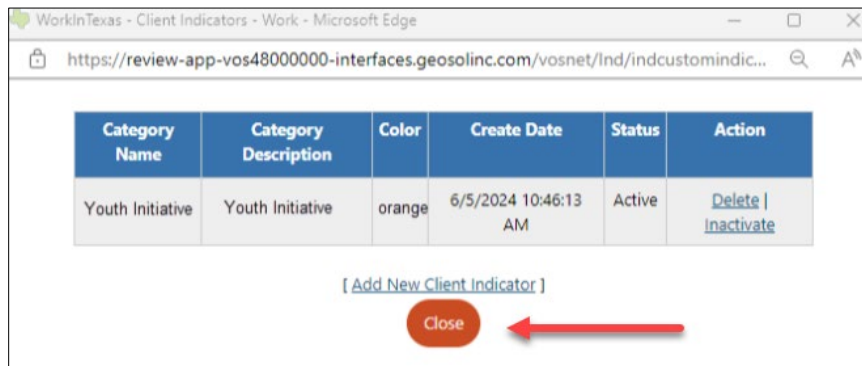
5. Click on the Indicator Category drop-down menu:



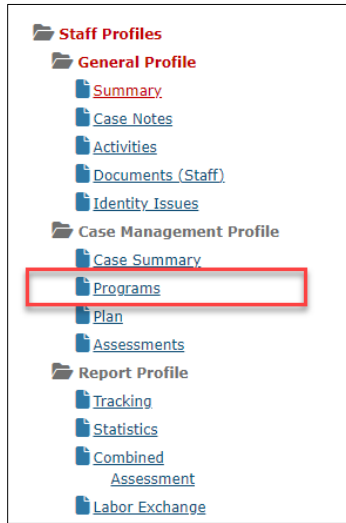
6. Select **Youth Initiative** and click **Save**:



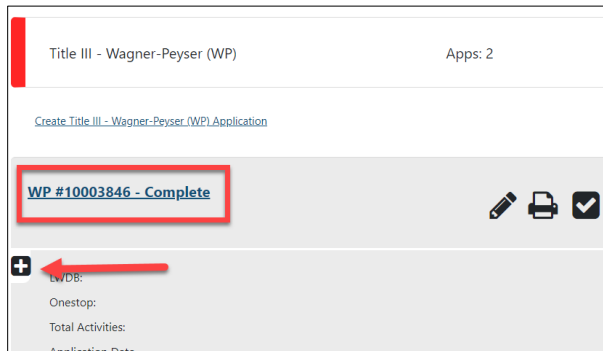
7. Click **Close**:



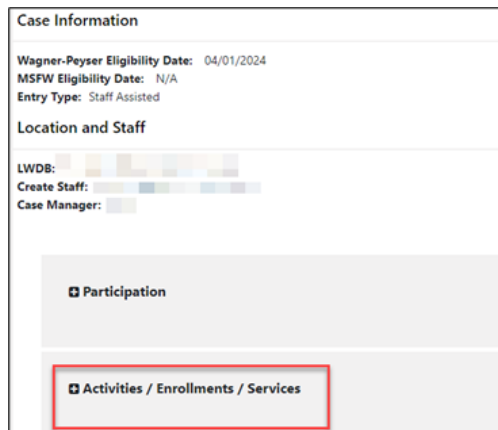
8. Navigate to the top of the page and click **Programs**:



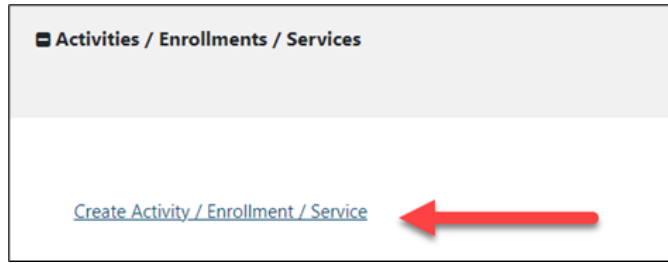
9. Navigate to the Wagner-Peyser ribbon and click the **+ (plus)**:



10. Click the **+ (plus)** on **Activities/Enrollments/Services**:



11. Click on **Create Activity/Enrollment/Services:**



12. Choose Wagner-Peyser as the **Customer Group**, and **Service 262** for the Service/Activity Code:

The screenshot shows a form titled "Case Management - Add a New Service". At the top, it says "Currently Manag" followed by a dropdown menu showing "Youth Initiative". Below this is a note: "Please provide information for the following fields and click the Save / Home button when you are finished. Others". A red box highlights the "Youth Initiative" label with a callout that says "Indicator will appear next to the customer's name".

The form has several sections:

- Service Plan**
  - \* **Customer Group:** Wagner-Peyser (dropdown menu)
  - \* **Service/Activity Code:** 262 - Job Readiness / Employment Skills (dropdown menu)
- Program Application Association:** 170 - Child Care (CC) Services - Program Closed - Continue Care, 171 - Child Care (CC) Services - Program Closed - Employed, 200 - Individual Counseling
- Scheduled Date:** 189 - Career Guidance Services, 201 - Group Counseling
- Actual Service Date:** 203 - Comprehensive Objective Assessment, 205 - Individual Employment Plan (IEP/EDP)
- \* **Service Provided:** 207 - Referred To Job Corps, 210 - Referred To Educational Services
- \* **Completion Code:** 241 - Group Workshops/Activities, 242 - Stress Management Group Activity, 243 - ONET Assessment
- RR Event:** 245 - Labor Market Information, 257 - UI Eligibility Assessment
- \* **LWDB / Region:** 258 - Job Search Assessment, 260 - Assistance Establishing Eligibility for Financial Aid
- \* **Office Location:** 261 - Support Services Information, 262 - Job Readiness / Employment Skills (highlighted with a red box)
- \* **Position:** 413 - Individual Service Strategies (ISS) - Youth Funded, 880 - (WTW) Went to Work

At the bottom, there are fields for "Staff User ID - Created:", "Staff User ID - Last Edited:", and "Edited:".

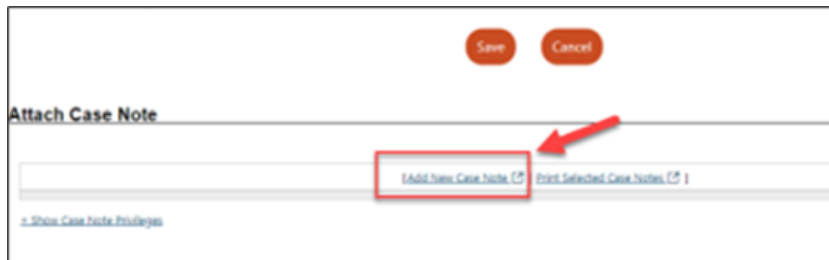
13. Under **Service Provided**, choose **No Virtual/Online, In-Person Only**:

The screenshot shows a 'Service Plan' form with the following fields: Customer Group (Wagner-Peyser), Service/Activity Code (262 - Job Readiness / Employment Skills), Program Application Association (blurred), Scheduled Date (6/3/2024 12:00 AM), Actual Service Date (6/3/2024), Service Provided (No Virtual/Online, In-person Only), Completion Code (No Virtual/Online, In-person Only), RR Event (None Selected), LWDB / Region (None Selected), and Office Location (None Selected). A red box highlights the 'Service Provided' dropdown, and a red arrow points to the selected option.

14. Under **Completion Code**, choose **Successful Completion**:

The screenshot shows the same 'Service Plan' form as above, but with the 'Completion Code' dropdown menu open. The 'Completion Code' field is highlighted with a red box, and a red arrow points to the 'Successful Completion' option in the dropdown list. Other options in the list include 'None Selected', 'Unsuccessful Completion - Failed to Report', 'Unsuccessful Completion - Dropped Out', 'Reported for Profiling Services - Did Not Complete', 'Reported for Profiling Services - Completed', 'Profiled Position Requirements Completed', 'Voided', and 'Successful - Intelligent Alert'.

- 15. LWDB/Region: Choose your **LWDB/Region** from the drop-down menu.
- 16. Office Location: Choose your **Office Location** from the drop-down menu.
- 17. Position: Choose **Staff**.
- 18. Select **Add New Case Note**.




- 19. LWDB/Region: Choose your **LWDB/Region** from the drop-down menu.
- 20. Office Location: Choose your **Office Location** from the drop-down menu.
- 21. Choose **Title III – Wagner-Peyser (WP)** from **Program** drop-down menu.



## 22. Select **Active App ID**.

**Case Note Details**


Please check to suppress this Case Note

\* **Contact Date:** 06/03/2024  Today (MM/DD/YYYY)

\* **LWDB/Region:** None Selected

\* **Office Location:** None Selected

\* **Program:** Title III - Wagner-Peyser (WP)

**App ID:** Active 

**Partner Program:** None Selected - Active


\* **Subject:**

**Contact Type:** None Selected

## 23. Enter in the **Subject** line: **Statewide Initiatives (TANF Summer Youth Initiatives)**

**Case Note Details**

Please check to suppress this Case Note

\* **Contact Date:** 06/03/2024  Today (MM/DD/YYYY)

\* **LWDB/Region:** None Selected

\* **Office Location:** None Selected

\* **Program:** Title III - Wagner-Peyser (WP)

**App ID:** Active

**Partner Program:** None Selected

\* **Subject:** Statewide Initiatives (TANF Summer Youth Initiatives)

**Contact Type:** None Selected

\* **Case Note Description:**

24. Choose **Contact Type** – for example **Face-to-Face**.

The screenshot shows the 'Case Note Details' form. At the top, there is a checkbox 'Please check to suppress this Case Note'. Below it, the 'Contact Date' is set to '06/03/2024' with a 'Today (MM/DD/YYYY)' button. The 'LWDB/Region', 'Office Location', and 'Program' dropdown menus are all set to 'None Selected'. The 'App ID' dropdown is set to 'Form Insert'. The 'Partner Program' dropdown is set to 'E-mail'. The 'Subject' field contains '(TANF Summer Youth Initiatives)'. The 'Contact Type' dropdown menu is open, showing options: 'None Selected', 'Face-to-Face', 'Telephone', 'Other', 'Form Insert', 'Fax', 'Mail', 'E-mail', 'Group Session', 'UI Reportable', and 'Virtual Meeting'. The 'Face-to-Face' option is highlighted, and a red arrow points to it. A red box highlights the 'Contact Type' label and dropdown. Below the dropdown is the 'Case Note Description' field.

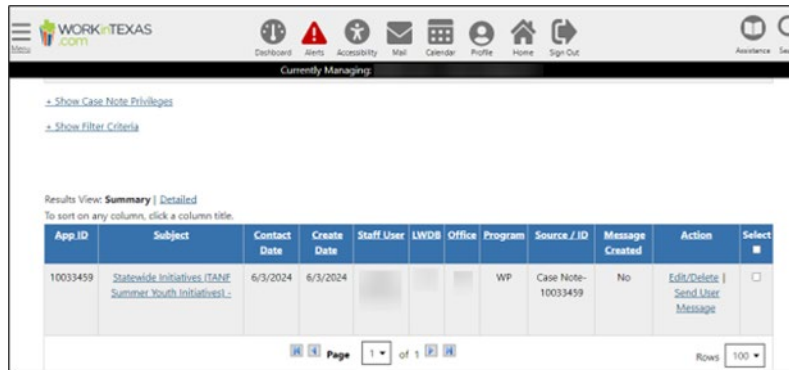
25. Enter **Case Note Description**. See **\*\*NOTE\*\*** at the end of this Desk Aid for Case Note Description information.

The screenshot shows the 'Case Note Description' field, which is a large text area with a red box around the label and a red arrow pointing to it. Below the text area is a '[ Clear Text ]' link. Below the text area is the 'Message Options' section, which contains a checkbox 'Create Message From Case Note on Save'. Below the 'Message Options' section is the 'Case Note Attachment(s)' section, which contains the text 'Listed below are the documents associated with this case note. Click the View link below to view that particular item.'

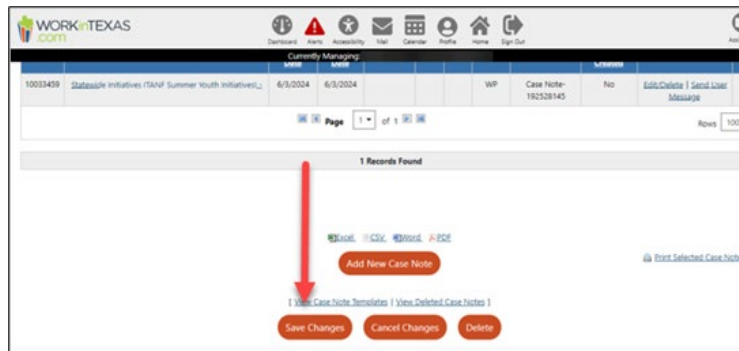
26. Click **Save or Save and Print**.

The screenshot shows the 'Case Note Attachment(s)' section. It contains the text 'Listed below are the documents associated with this case note. Click the View link below to view that particular item.' Below this text are links for 'Results View: Summary | Detailed' and a checkbox 'View Thumbnails'. Below these links is a warning message: 'Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. These spaces will be replaced with \_ when saving the document in our system.' Below the warning message is an 'Add a Document' link. At the bottom of the form are three buttons: 'Save', 'Save and Print', and 'Cancel'. Red arrows point to the 'Save' and 'Save and Print' buttons.

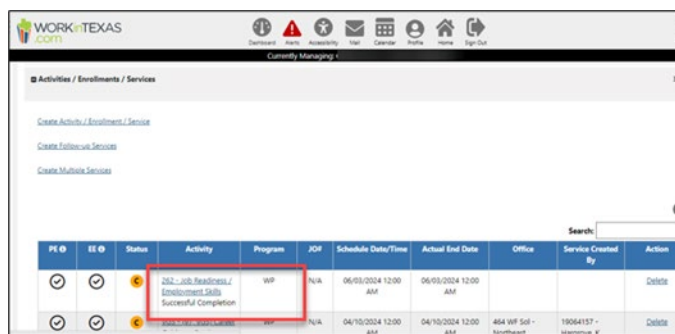
27. After saving, you will see a case note table that is created in the Service Plan.



28. Select **Save Changes** at the bottom of the page.



29. The service displays in the Wagner-Peyser Activities/Enrollments/Services ribbon.



**\*\*NOTE\*\*** Service 262 for Wagner-Peyser is currently configured as a 1 day service, staff will need to reenter the service every 30 days to track and document the initiative activity until completion of the initiative. A **comprehensive** case note will need to be entered each that service 262 is entered in WIT.