WorkinTexas.com Choices Program Management
Exercise Workbook

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

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Contents

Choices Program: Case Management Training

This manual contains the exercises for the WorkinTexas.com (WIT) Choices Case Management training class.

You may also use this book as a desk aid to assist you with completing activities at work.

Note: All of the data, examples, and images in this manual are taken from the training database system and do not contain any Personal Information (PII). Individual, employer, and service provider data are fictitious. The resemblance to any real people or companies is strictly coincidental. As you work through the exercises, do not enter any personal information into the training environment.

Note: In the WIT environment there are multiple ways to complete the same actions. Different choices made for the same actions can lead to different results and/or screens in the software. If you get lost in an exercise, use the browser back button at the top of the page to go back to a familiar step, or you can return to the Dashboard to start over.

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. The benefit of this scheme enables training participants to realize how powerful the WIT system can be.

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.

Guidance for Using This Workbook

In the exercises:

- Hyperlinks are **bolded** and **underlined**.

- The term Customer and Individual are used interchangeably.

Exercise #1: Login as Staff

Objective: Login as Staff.

Assumption: You are in the WIT training environment at Texas WIT Training Site (opens in a new window).

Purpose: This exercise is to become familiar with how to log in to the WIT environment.

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 staff username.

4. Enter your assigned password-Trainingpassword@1.

5. Select I'm not a robot checkbox for reCAPTCHA.

6. Click **Sign In**.

7. Review Staff Sign-in Notice text.

8. Click **I agree**.

Exercise #3: Choices Outreach Pool Management Options

Objective: Review the Outreach Pool for Choices.

Assumption: You are in the WIT training environment at [Texas WIT Training Site (opens in a new window)](#) and accessed My Staff Dashboard.

Purpose: This exercise is necessary to demonstrate for staff who will be responsible for Choices Outreach Pool management.

Note: All aspects of Outreach are demonstration only and cannot support any hands-on activities. This is a limitation of the training environment and the lack of a functional interface for training.

To train this lesson, instructors will need to use the following documents:

- Outreach Pool Management PowerPoint.

- Outreach Pool Training Aid.

- WorkinTexas Choices Case Management Training Guide.

Exercise #4: Choices Outreach Pool Appointment Scheduling

Objective: Review the Outreach Pool Appointment Schedules for Choices.

Assumption: You are in the WIT training environment at [Texas Wit Training Site (opens in a new window)](#) and accessed the Choices (TANF) Outreach Pool management training documents.

Purpose: This exercise is necessary to demonstrate for staff who will be responsible for Choices Outreach Pool management.

Note: All aspects of Outreach are demonstration only and cannot support any hands-on activities. This is a limitation of the training environment and the lack of a functional interface for training.

To train this lesson, use the following documents:

- Outreach Pool Management PowerPoint.

- Outreach Pool Training Aid.

- WorkinTexas Choices Case Management Training Guide.

Exercise #2: Client System Registration

Objective: Create a fictitious individual for the purpose of Choices case management training.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and accessing My Staff Dashboard.

Purpose: This exercise is designed to help you become familiar with creating an individual registration.

To create an individual account:

1. Select the Create an Individual from the left navigation menu under the **Services for Workforce Staff > Manage Individuals** menu.

2. In the Login Information section, enter a fictitious individual's username. Make up this information according to the business rules displayed in blue text and write down the information for future use.

3. Enter password, **Training@1.**

4. Choose a security question and enter **123** as the response.

5. Create the applicant's first and last name. Do not use your name. You can make this up.

6. Select the I do not wish to provide my Social Security Number **checkbox**.

7. In the Phone Number section, enter a primary phone number without an extension **(this needs to be fictitious).**

8. In the E-mail Address section, enter the individual's primary email address and re-enter it in the Confirmation text box. (**Make this email up**).

9. Verify United States is the Primary Location Information Country. If not, change the value to United States.

10. Select **Yes** for authorized to work question.

11. Select **No** for homeless or no permanent residence question.

12. Enter a number, street name, and street type in the Address Line 1 field. EX 410 Main St. (Enter a **local ZIP Code**).

13. Verify the City field.

14. Select **Texas** as the State.

15. Verify the County.

16. Verify Country is **United States**.

17. Enter the Date of Birth in (MM/DD/YYYY) format of **04/14/1985**.

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

18. Select the Gender of your participant.

19. Select **No** for I am currently in Foster Care, or I have aged out of Foster Care System.

20. Select **Citizen of U.S. or U.S. Territory** in the Citizenship section.

21. In the Disability section, select **No, I do not have a disability**.

22. In the Education Information section, select the individual's highest education achievement level. Select **11th Grade Completed** for highest education level and their current school status, **No**, **not attending any school**.

23. In the Spouse or Caregiver of a U.S. Military Member section, select **No**.

24. In the Military Services section, select **No** for the **Are you currently in the U.S. Military or a Veteran?**

25. In the Job Title section, enter the individuals preferred job title, **Cashier**. As you type, suggested matches will display, from which you may select a title.

26. In the Job Occupation section, select **Retail Salespersons**.

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 the matching occupation title and code.

27. In the Ethnic Origin section, select any answer to Are you of Hispanic or Latino (**your choice**).

28. Select Any Race for the Race – Please Check all that apply question.

29. Select **No** for the Language question.

30. Select **Save** to complete the registration process.

Note: If you encounter an error upon saving the data entry, the system will display an error message in red bullet point text at the top of the page.

Upon successfully saving the data entry, the system displays a Registration Confirmation page.

Exercise #5: Choices Outreach Pool Search and Roster Selection

Objective: Review the Outreach Pool search process and roster selection for Choices.

Assumption: You are in the WIT training environment at [Texas Wit Training Site (opens in a new window)](#) and accessed the Choices (TANF) Outreach Pool management training documents.

Purpose: This exercise is necessary to demonstrate for staff who will be responsible for Choices Outreach Pool management.

Note: All aspects of Outreach are demonstration only and cannot support any hands-on activities. This is a limitation of the training environment and the lack of a functional interface for training.

To train this lesson, use the following documents:

- Outreach Pool Management PowerPoint.

- Outreach Pool Training Aid.

- WorkinTexas Choices Case Management Training Guide.

Exercise #6: Choices Outreach Pool Roster Management

Objective: Review the Outreach Pool Roster Management process for Choices.

Assumption: You are in the WIT training environment at [Texas Wit Training Site (opens in a new window)](#) and accessed the Choices (TANF) Outreach Pool management training documents.

Purpose: This exercise is necessary to demonstrate for staff who will be responsible for Choices Outreach Pool management.

Note: All aspects of Outreach are demonstration only and cannot support any hands-on activities. This is a limitation of the training environment and the lack of a functional interface for training.

To train this lesson, use the following documents:

- Outreach Pool Management PowerPoint.

- Outreach Pool Training Aid.

- WorkinTexas Choices Case Management Training Guide.

Exercise #7: Choices Participant Application

Objective: Complete a Choices Program Application

Assumption: You are in the WIT training environment at [Texas WIT Training Site (opens in a new window)](#) and are assisting your created participant.

Purpose: This exercise is necessary for staff to practice creating Choices Program Applications.

To complete a Choices application:

1. Click on the blue hyperlink of your individuals **Name**.

2. From the Currently Managing field. EX **Spencer, Michael**.

3. Under Staff Profiles, expand each **plus sign icon** ➕ until they are all minus signs. Select **Programs**.

4. Scroll down to the **Choices** Ribbon.

5. Select **Create Choices (TANF) Application** link.

6. Enter the **HHSC Client ID**, if not already populated.

7. Select **Today** for the Application Date, if not already populated.

8. Select **Today** for the TANF Application Date.

9. Select **Today** for the WOA Date.

10. For HHSC Type Program select **01 - TANF Cash Assistance and Medicaid.**

11. Select **Single Parent/caretaker relative caring for a child under age 1** in the TANF Applicant Work Code field.

12. Select **Today** for the Initial Appointment Date.

13. **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.

14. Click **Next**, moving you to the Contact Page.

Note: Selecting the Next button validates the data, ensures that all required fields are completed, saves the information you entered, and moves you to the next screen.

Contact Information: Page 2 of 6

1. Confirm the individual's First and Last Name, Social Security Number, Residential and Mailing Address, Phone Information, and Email Information. Edit the information as necessary.

2. Select **Internal Message** as the preferred method of contact.

3. Select **Cell/Mobile Phone** for Primary Phone Type.

4. Select **Voice** as the Primary Phone Mode.

5. If applicable, select the **Add New Contact** link to add a new contact to this account.

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

Demographic: Page 3 of 6

1. Select Citizen of US or US Territory.

2. Select No for primarily speaking a language other than English.

3. Select No for English language assistance.

4. Select No for Served in US Military.

5. Select No for parent training.

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

Education: Page 4 of 6

1. Confirm or edit the Education information as necessary. 2. If applicable, select the **Add Education History** link to add additional education information.

2. Click **Next** to save your edits and continue to the Employment page.

Employment Page 5 of 6

1. Select **No** for have you ever worked.

2. Click **Next** to save your edits and continue to the Eligibility Summary page.

Eligibility Summary Page 6 of 6

1. Review the eligibility fields.

2. Click the **<u>Assign Me</u>** link to assign this application to your own case load.

3. Select **Finish**.

4. Select **Return to Programs Tab**.

Exercise #8: HHSC Information Ribbon

Objective: Review the HHSC Ribbon contents for Choices.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: Review important data provided through the HHSC interface.

To view imported HHSC information:

1. Click the **plus sign icon** ✚ to expand their Choices Program application ribbon.

2. From the Choices ribbons, click the **plus sign icon** ✚ to expand the HHSC Information and click the **HHSC Information** link.

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.

Note: There is no interface to the HHSC system in the training environment. You will not see any data displayed.

Exercise #9: Benefits Information Ribbon Choices

Objective: Review the Benefits Information Ribbon.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise is to locate and view the individual's benefits information in WIT.

To view the benefits interface:

1. Click the **plus sign icon** ⊞ to expand the Choices Program application panel.

2. Click the **plus sign icon** ⊞ to expand the Benefits Information ribbon to view the **Benefits Information Table**.

Note: There is no benefit information displayed in the training environment.

Exercise #10: Participation Ribbon

Objective: To create a Participation Record.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise is to create a participation record in the WIT environment.

To complete the Participation form:

1. From the Choices ribbons menu, select the **plus sign icon** to expand the Participation ribbon.

2. Click the **Create Participation** link. The Participation Information form displays.

3. Select the **Today** link for the **Participation Date**.

4. Verify education information says **11 Elementary/Secondary school grade completed**.

5. Select **Not Attending school, HS Dropout**.

6. Select **Never Been Employed** for Employment Status.

7. Select **Neither Claimant or Exhaustee**, in UC/UI eligibility.

8. Click **Next**.

9. Click the **Select Activity Code** Link.

10. Select **102 – Initial Assessment.**

11. Click the **<u>Today</u>** link for Projected End Date.

12. Verify Position says **Staff.**

13. Select/Verify **Yes** is selected for IEP appearance.

14. Click **Next**.

15. Verify provider record has pre-populated.

16. Click the **<u>Select Service, Course or Contract</u>** link.

17. Select **102 – Initial Assessment.**

18. Click **Next.**

19. On the Closure Tab, select **Today** as the Last Activity Date.

20. Select **Successful Completion** as the Completion Code.

21. Click **Finish.**

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. The first activity will display a Trophy icon next to the service name.

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.

Exercise #11: Work Readiness Assessment Ribbon

Objective: Review the process for completing the Work Readiness Assessment for Choices.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice creating a work readiness assessment by identifying barriers to employment in the WIT environment.

To complete a Work Readiness Assessment:

1. Click the **plus sign icon** ✚ to expand the Work Readiness Assessment panel.

2. Click the **Create Work Readiness Assessment** link.

3. Check each of the following options:

4. Housing – **Has difficulty paying for food, utilities, bills, etc. Also select Add housing barrier.**

5. Personal/Family issues – **No Issues Reported.**

6. Child Care Availability – **Lacks adequate and/or reliable child care.** Select **Add Child Care Availability Barrier**

7. Child Care Expenses – **Financially unable to pay child care expenses. Select Add Child Care Expenses Barrier.**

8. Transportation Availability – **Has access to reliable transportation.**

9. Transportation Expenses – **Lacks funds needed for insurance/registration and/or other transportation related needs.** Select **Add Transportation Expenses Barrier**

10. Language Proficiency – **No issues reported**.

11. Math/Reading Skill – **No issues reported**.

12. Learning Disability – **No issues reported**.

13. High School Diploma/ High School Equivalency (HSE). **Select Add High School Diploma/HSE Barrier.**

14. Credential – **No issues reported.**

15. Physical Issues – **No issues reported.**

16. Mental Health – **No Issues reported.**

17. Substance Use – **No issues reported.**

18. Family Violence – **No issues reported.**

19. Legal Issues - **No issues reported.**

20. Criminal History - **No issues reported.**

21. Work History – **Has limited/no work history. Select Add Work History Barrier.**

22. Resume – **Does not have resume.**

23. Interviewing Skills – **Needs to improve interviewing skills, lacks appropriate interview attire, lacks references.**

24. Digital Access & Job Search Needs– **Does not know how to use the internet to search for jobs, Limited or no access to computing device.**

25. Soft Skills Concerns- **No issues reported.**

26. If applicable, enter other barriers that are not listed.

27. Click **Save.**

Managing an Existing Work Readiness Assessment

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 panel.

4. Click the **Edit** link in the Action column.

5. When all desired changes have been made to the WRA form, click the **Save** button.

Exercise #12: Individual Employment Plan (IEP)

Objective: Create and manage IEP goals and objectives.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise helps participants locate the IEP/ISS and create and manage IEP goals and objectives.

To create an IEP for the assisted individual:

1. Select the Plan link under the Case Management Profile folder or select the Plan tab located next to the Programs tab.

2. Under the Individual Employment Plan/Service Strategy section, select the Create Individual Employment Plan/Service Strategy button. The Plan tab of the IEP displays.

3. In the Plan Information section, select the Today link for the Plan Start Date.

4. Click Next to save your data entry. The Goals tab opens.

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

1. Under the **IEP/ISS** Goals section, select **Add New Goal** link. The Add new Goals page displays.

2. In the Goal Information section, select a **LWDB/Region and Office**.

3. Check Choices as **Program Affiliation**(s).

4. Select a Type of Goal: **Education**, Training, Schooling, etc.

5. Select the Term of Goal: **Short Term**, Long Term, Intermediate Term.

6. Enter a **Description** of Goal. Use **Attain HSE.**

7. Enter **Today** for the date established for the goal.

8. Enter the **Estimated Completion Date** for the goal (make this up as appropriate for the scenario).

Note: Leave the Actual Completion Date blank until closing the goal, then you will enter the Actual Completion Date, select **Closed** under Completion Status, and indicate the Reason Closed.

9. Enter any additional information in the Goal Details text box.

10. Click **Save**. The Goals tab redisplays with a table displaying the added goal along with links to Edit or Delete.

11. Repeat this procedure for as many goals as desired. For this training, we will only enter one goal.

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.

2. Select the **Goal** to be associated with this objective.

3. Select the **LWDB/Region, Office Location, and Program Affiliation.**

4. For Program Affiliation, select **Choices** from the drop-down menu.

5. **Name** the Objective. Use **Research Program Locations.**

6. For Date Established, Select the **Today** link.

7. Enter Review Date on which progress should be evaluated **(Usually 45 days after Established Date).**

8. Click **Save**. The Objectives tab redisplays with the added objective along with links to Edit or Delete the objective.

9. Click the **Add new objective** link to enter another objective.

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

1. On the Objectives tab, under Objective Information, click the **Select pre-defined objectives** link.

2. Select the **Goal of Attain HSE** for the objective(s).

3. Select the **LWDB/Region and Office Location**.

4. For Program Affiliation, select **Choices.** The page will refresh with the list of pre-defined objectives for the program.

5. Click the checkbox **in the left column for each objective to add to the individual's program goal. Select the checkbox for Education – Attend GED Prep Classes** and **Education – Study Skills Training**.

6. For **Date Established,** select the **Today** link**.** Click anywhere in the Review Date field to automatically pre-populate the Review Date which is 45 days from the date established date.

7. Click **Save**. The Objectives tab redisplays with the added objectives, along with links to Edit or Delete each of the objectives.

8. Click **Next** to proceed to the Services tab to review.

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

9. Click **Finish.**

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.

3. To include Applicant and/or Staff Signatures, in the Remote Signature section, click the Capture Signature link for the desired person.

   A pop-up window displays, where you select how the signatures will be obtained.

   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.

   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.

4. After clicking **Send**, the message is sent to the recipient's Message Center, and the Plan page redisplays, 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.

5. 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.

6. 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.

Exercise #13: Activities, Enrollments, Services Ribbon

Objective: Record Activities / Enrollments / Services for the delivery of the Choices program.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: To help participants practice documenting the delivery of program services.

To add a new activity, enrollment, or 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 panel.

3. Click the **plus sign icon** ⊞ to expand the Activities/Enrollments/Services panel.

4. Click the **Create Activity / Enrollment / Service** link to create an activity. The Activity Enrollment wizard displays the General Information tab.

General Information Tab

1. Select the Customer Program Group, LWDB, and Office Location from the drop-down lists.

2. Click the **Select Activity Code** link to open an activity list, and then **205 – Individual Employment Plan (IEP/EDP)**.

3. Select **Today** for the Actual Begin date.

4. Enter **Today** for the Projected End Date.

5. In the Staff Information section, confirm or select your Position, if applicable.

6. Click **Yes** for Activity to appear on **IEP**.

7. Optionally, you may perform any of the following steps to complete this section:

   i. To assign this applicant to an authorized Choices case manager, click the **Assign Case Manager** link.

   ii. To assign this participant to yourself, click the **Assign Me** link (you must be currently assigned to the appropriate Choices case assignment group).

   iii. To remove the currently assigned case manager, click the **Remove Case Manager Assignment** link.

   iv. Enter Comments regarding this enrollment record.

8. Click **Next** to save the information and proceed to the next tab.

Schedule Tab

1. Skipped in this example.

Service Provider Tab

1. Verify Provider information.

2. Click the **Select Service, Course or Contract** link to open an activity list, and then **205 – Individual Employment Plan (IEP/EDP)**.

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

Closure Information Tab

1. Enter **today's** date in the Last Activity Date field.

2. Enter a completion code of **Successful Completion.**

3. Click **Finish.**

To close an activity/service previously left open:

1. Click the **plus sign icon** ➕ to expand the Activities / Enrollments / Services panel.

2. Click the **Close** link in the Actual End Date column for the desired activity.

3. Enter **Today** for the Last Activity Date.

4. Select the Completion Code of **Successful Completion**.

5. 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.

6. Click **Finish**.

Exercise #14: Activities, Enrollments, Services Ribbon with training hours

Objective: Perform data entry to record the delivery of a Choices program service that includes attendance requirements.

Assumption: You are in the WIT training environment at Texas WIT Training Site (opens in a new window).

Purpose: This exercise helps participants practice documenting the delivery of program services.

To add a new activity, enrollment, or 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 panel.

3. Click the **plus sign icon** ➕ to expand the Activities/Enrollments/Services panel.

4. Click the **Create Activity / Enrollment / Service** link to create an activity.

General Information Tab

1. Select the Customer Program Group, LWDB, and Office Location from the drop-down lists.

2. Click the **Select Activity Code** link to open an activity list, and then **262 – Job Readiness / Employment Skills**.

3. Select **Today** for the Actual Begin date.

4. Enter **7 days from Today** for the Projected End Date.

5. In the Staff Information section, confirm or select your Position, if applicable.

6. Click **Yes** for Activity to appear on IEP.

7. Click **Next** to save the information and proceed to the next tab.

Schedule Tab

1. In the Scheduled Column, select the clock icon in the left side box for Monday, and select **8:00 A.M.**

2. Select the clock icon on the same row on the right side of the Scheduled column and select **10:00 A.M.**

3. Repeat the process for **Tuesday and Wednesday**.

4. Select **Next.**

Service Provider Tab

1. Verify Provider information.

2. In the Service, Course or Contract section, click the **Service, Course or Contract** link.

3. Select **262 – Job Readiness / Employment Skills.**

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

Closure Information Tab

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

Exercise #15: Attendance Ribbon

Objective: Perform data entry to record attendance for a Choices program service.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise helps participants practice documenting attendance.

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 panel.

3. Click the **plus sign icon** to expand the Attendance ribbon.

4. Click the **Attendance Tracker** link.

5. In the Participation Period section, validate the **Year** and **Month**.

6. Validate the Actual Hour Entry Type of **Daily Only**.

7. 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.

8. Enter the attendance hours and minutes in the format *hh:mm* (:00-:59 for actual minutes).

9. 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; see figure below). 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 (see figures above).

10. 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:

To enter Verification for a countable activity:

1. Select the **Verification** hyperlink just above the Save Attendance Button. A new page will open.

2. Select **Add Verification.** A new page will open.

3. Select **Attendance Records** for the Verification Type.

4. Enter **Today** as the Received Date.

5. Select **Today** for Verification Valid From and To.

6. Enter a **Contact Name**.

7. Select **Instructor** as the Verification Provider.

8. Select **Texas** for State.

9. Enter the appropriate **LWDB office.**

10. Select the **Save** button. This will return you to the previous page.

11. Select the **Return to Attendance Tracker** button.

12. Select **Return to Programs Tab.**

Exercise #16: Household Member Information Ribbon Choices

Objective: Review Household Member interfaced data for a Choices program service.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: Participants practice reviewing interface records from HHSC.

To access Household Member information:

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 Household Member Information ribbon.

4. Review Household Member Information present.

Exercise #17: Sanctions Ribbon

Objective: Review Sanction Processes for the Choices program.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise helps participants practice entering and reviewing Sanction records to and from HHSC.

To initiate a sanction referral:

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 Sanctions ribbon Any existing sanctions will be displayed in a table.

4. Click the **Create Sanction Referral** link.

5. Verify/Select **LWDA/Region** and **Office Location**.

6. Select a **Referral Reason-Select 4- Failed to Participate.**

7. Select **Today** from the Non-cooperation/cooperation Date field.

8. Attach **Case Note** per policy.

9. Click **Save.**

Exercise #18: Good Cause Ribbon

Objective: Complete the Good Cause Ribbon.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise helps participants practice Good Cause documentation to temporarily excuse a participant from Choices program requirements.

To enter a Good Cause Entry for Choices:

1. Navigate to the Good Cause Ribbon and select **Create Good Cause Form** hyperlink**.**

2. Select **Family Crisis** for the reason.

3. Enter the begin date of **Today**.

4. Enter the end date of **the last day of the current month**.

5. Enter comments as necessary, based on policy.

6. Review the Choices Form 1836 A/B form previously entered or click on the **Create TANF Form 1836 A/B** link to create the form.

7. Add **Case Notes** per Texas policy.

8. Select **Save** to complete the record.

9. To review the form 1836 A/B just created. Click on the **plus sign icon** ⊞ **next** to the Form 1836A/B ribbon to open the ribbon.

Exercise #19: Form 1836A/B Ribbon

Objective: Create a Form 1836A/B request for the participant.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: To enter a Form 1836A/B for documentation.

To Create a Choices Form 1836 A/B:

1. Navigate to the Form 1836 A/B Ribbon and select the **Create Choices Form 1836 A/B** hyperlink.

2. Enter a Begin Date of **Today**.

3. Enter an End Date in the **future**.

4. Select **Yes** for Reduced Work Hours.

5. For Required Hours enter **4**.

6. **Do not** select Permanent.

7. Add **Case Notes** per Texas policy.

8. Select **Save** to complete the record.

Exercise #20: Add Employment Ribbon

Objective: Document obtained employment.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice entering details of the individual's obtained employment in the WIT environment.

To add new employment details:

1. Select the **Add Employment** link from the Add Employment ribbon. The Add/Edit Employer page displays.

2. Enter the **Employer Information** and **Job Information**, taking note of the required fields marked with a red asterisk.

   o 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 Search Individual Employment History or Select from internal Job Order/Placement.

3. For Employer Name, enter **Kohl's** and select the first option on the list that appears. Various fields will prepopulate with the Kohl's information.

4. For State Tax ID, enter **22334444**.

5. For Job Title, enter **Cashier**.

6. For Occupation, click the **Select Occupation** link.

7. In the blank field, enter **Cashier**. A list will appear.

8. Select **Retail Salesperson**.

9. For Is this a green job, select **No**.

10. For Salary Frequency, select **hourly**.

11. For Salary Wage, enter **13.10**.

12. For Job Start Date, select **Today**.

13. For Job End Date, select the **Currently Employed** checkbox.

14. Select **Yes** for the following:

    o Primary Employer

    o Receiving Fringe Benefits

    o Receiving Health Care Benefits

    o Job Covered by Unemployment

15. Select **No** for the following:

    o Is this Entrepreneurial and/or Self-Employment?

    o Is this a Registered Apprenticeship?

    o Is this active Military Service?

    o Is this considered Non-Traditional Employment?

16. Select **No** for Is this considered Training Related Employment?

17. Select **Yes** to add to employment history.

18. Click the **Save** button. The Add Employment ribbon redisplays, with the added employment record listed in a table (as shown below).

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.

Exercise #21: Credentials Ribbon

Objective: Record attained credentials.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice documenting credential attainment information on behalf of the individual in the WIT environment.

To record a new credential:

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

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

3. In the **Credential Information** section, select Occupational Certification.

4. For **Credential Verification**, select the **Verify** link to identify the document being used for Credential Verification and select **School Records**. Click the **Verify** link again to collapse the list.

5. For **Date Credential Received**, select the **Today** link.

6. 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.

7. Click **Select** in the action column for the appropriate activity.

8. Click **Save**.

Exercise #22: Case Transfer Ribbon

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Objective: Create a transfer request.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice how to create a case transfer request when an individual participating in the Choices program moves to a different service delivery region.

To create a case transfer request:

1. Click the **plus sign icon** ➕ to expand the **Case Transfer** panel.

2. Click the **Create Case Transfer Record** link.

3. Select the **LWDB/Region** you are requesting the participant transfer to. Select North Central WF Board.

4. In the Staff to be notified of Transfer Request drop down menu, select **002 Arlington**.

5. For the Reason for Transfer: check the box for **Relocation out of region**.

Note: If you select **Other (Please Explain),** then another field will open requiring you to explain the reason.

6. If desired, enter any **Additional Comments** in the text box.

7. Click the **Save** button. The Case Transfer Notice is sent to the selected staff member in the receiving region and the Programs tab redisplays with the record added in the Case Transfer panel.

Exercise #23: Closure Ribbon

Objective: Close all services and create closure form.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice closing all services, closing goals and objectives for the IEP, and practice creating the closure form.

To close a service:

1. The first step is to close any open Activities/Services from the Activities/Enrollments/Services ribbon. Open activities have an **O** icon in the **Status** column.

2. To close a service, select the **<u>Close</u>** link in the **Actual End Date** column for the desired activity. The **Closure Information** tab displays.

3. For Last Activity Date (mm/dd/yyyy) select **Today**.

4. For Completion Code, select **Successful Completion**.

5. Click the **Finish** button. The Programs tab redisplays with the activity status closed (Status icon for the activity should now be orange) in the Activities/Enrollments/Services panel of the Choices program. The Actual End Date Column will also display the close date along with the Completion Code.

6. Repeat the steps above until all open services are closed.

Note: If there are open services while you're trying to perform a closure, an error message will display at the top of the page stating, **Open activities exist. Unable to create closure.**

Closing IEP Objectives and Goals

Note: Remember, you must work from right to left 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.

To close Objectives or Goals for the assisted individual:

1. Select the **Plan** tab. The IEP page will display.

2. Open the plan by selecting the **Edit** link in the Action column. The Plan tab of the IEP displays.

3. Click the **Objectives** tab to close all open objectives.

4. To close an objective, select the **Edit** link under the Action column.

5. In the **Objective Information** section, enter the Actual Completion Date by selecting the **Today** link.

6. For **Completion Status**, select **Closed**.

7. For **Reason Closed**, select **Successful**.

8. Add a comment, if desired, then click **Save**. The tab redisplays with the Closed status.

9. Repeat the above steps until all the objectives are closed.

10. Once all the objectives are closed, select the **Goals** tab to close all open goals.

11. To close the Goal, select the **<u>Edit</u>** link under the Action column.

12. In the Goal Information section, enter the Actual Completion Date by selecting the **<u>Today</u>** link.

13. For Completion Status, select **Closed**.

14. For Reason Closed, select **Successful**.

15. Add a comment, if desired, then click **Save**. The Goal redisplays with the Closed status.

16. Once all the services, goals, and objectives of the IEP are closed, return to the Programs tab.

To create a Closure Record:

1. Open the Closure ribbon and select the Create Closure link.

2. From the Case Closure Reason drop down menu, select **Employed - Verified**.

3. Select the applicable Entered Employment answer of **YES**.

4. On the Add/Edit employer screen, select Search Individual Employment History. Select the entry for **Kohl's** that was created earlier.

5. Validate all existing data is correct and select the **Save** button.

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

Note/Important: Once a Choices Case Closure form is created, a new program activity cannot be created for this enrollment period; only follow up services are permitted. If the customer must receive additional program services within this existing enrollment period, authorized staff must delete the Choices Case Closure form.

Exercise #24: Exit/Outcome Ribbon

Objective: Manually exit the customer.

Assumption: You have the Choices customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice creating this form to create a hard exit in the WIT system. (**Note**: Only in rare circumstances will you use this method to exit a customer)

To manually exit the customer:

1. 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:	
Alternate Contacts:	Add Alternate Contacts [↗]

Exit / Outcome Ribbon

2. Enter the **Exit date** (mm/dd/yyyy) by selecting **<u>Today</u>**.

3. For **Exit Reason**, select **Health/Medical** from the drop-down menu.

4. If applicable, enter an exit reason description.

5. 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 <u>close all other programs</u> for which the customer is co-enrolled. This includes TAA, Wagner-Peyser, SNAP E&T, and/or WIOA.