WorkinTexas.com Outreach Pool Training Aid

Approved by the

Texas Workforce Commission

Training and Development Department

Training and Development Mission

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Texas Workforce Commission

Training and Development Department

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Outreach Pool Overview

Training Objectives

After completing this lesson, you will be able to:

- Understand the role of the Outreach Pool.
- Identify where Outreach Rosters are managed, and by whom.
- Create and manage Outreach Appointments.
- Navigate to the Outreach Pool area.
- Assist the Individual.

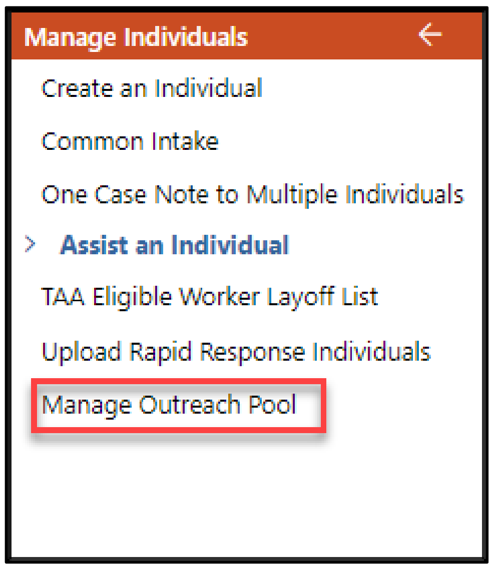
As part of the certification process for Choices or SNAP E&T program applicants, they must first be approved by HHSC and added to the appropriate program Outreach Pool. Once HHSC has determined that a TANF applicant or SNAP applicant is eligible to receive services, customer data will be sent to WIT overnight via an interface file.

Accessing the Outreach Pool

Access to the Outreach pool is provided through either the Left Navigation Menu or the Manage Individuals Menu Screen.

Left Navigation Menu

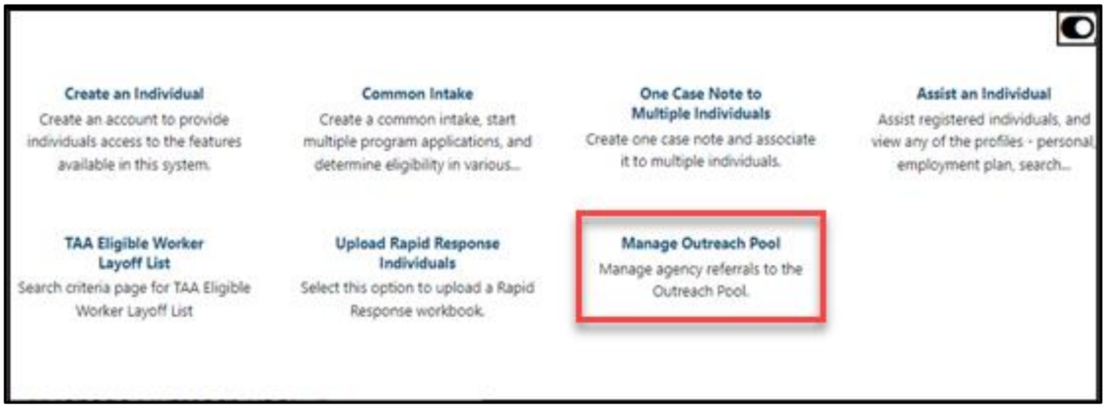
1. If your menu is hidden by default, select the menu button or the hamburger icon to access the Left Navigation Menu.
2. Under Services for Workforce Staff, click on the arrow to the right of Manage Individuals.
3. From the Manage Individuals flyout, open Assist an Individual, select the **Manage Outreach Pool** hyperlink (pictured below).



Manage Individuals flyout

Manage Individuals Menu Screen

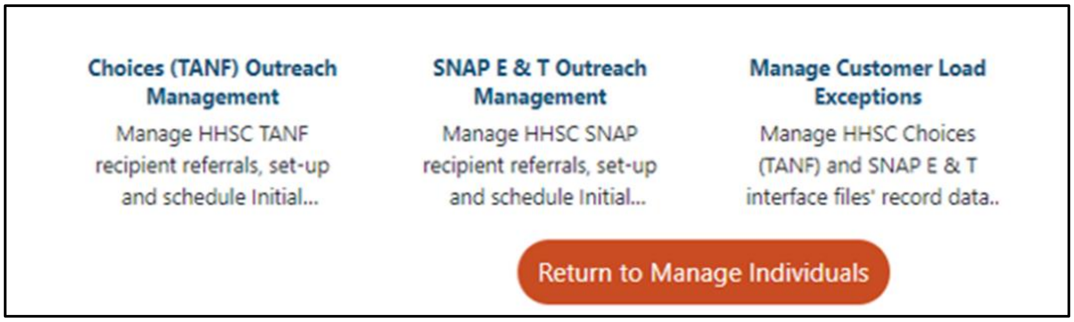
1. If your menu is hidden by default, select the menu button or the hamburger icon to access the Left Navigation Menu.
2. Under Services for Workforce Staff, click directly on the **Manage Individuals** hyperlink.
3. From the Manage Individuals Menu Screen, select the **Manage Outreach Pool** hyperlink (pictured below).



Manage Individual Menu Screen

Managing the Outreach Process

Options visible to staff members will vary based on user privileges. Since both SNAP E&T and Choices Outreach Pools are managed within the Manage Outreach Pool Menu, staff users will need to make the appropriate selection for their program. By selecting the **Choices (TANF) Outreach Management or SNAP E&T Outreach Management** hyperlink respectively, staff will access the records specific to program applicants referred by HHSC (see image below).

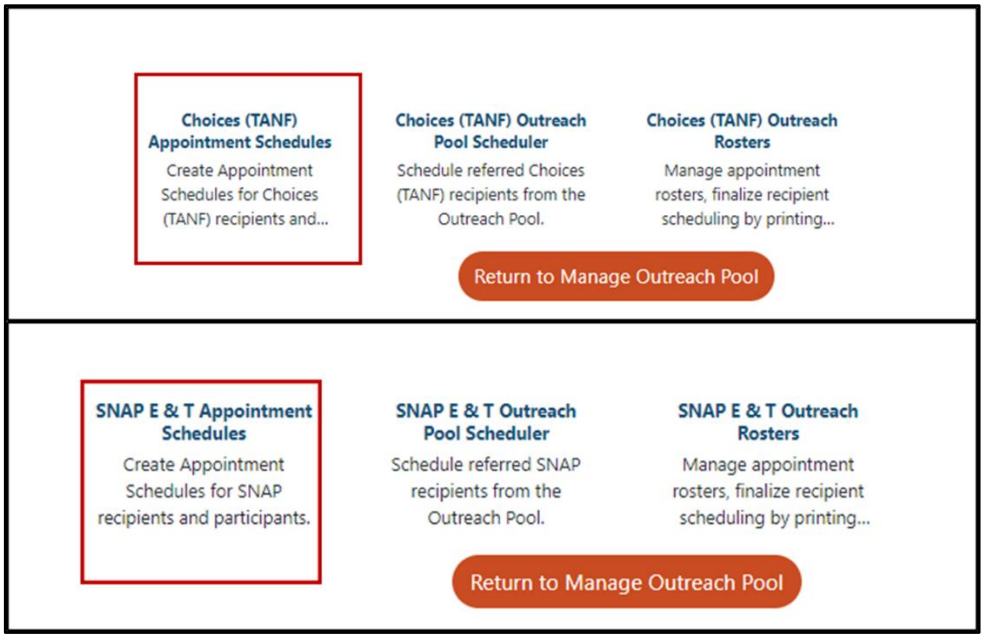


Outreach Pool Options Menu

Program Outreach Management Options

Once staff members select the **appropriate program Outreach Management** link, three primary Outreach Pool options will display (pictured below). The options available to each program are identical, so staff members would simply choose the program (Choices or SNAP) they are working with. The options include the following:

- Appointment Schedules – Create, modify, and edit initial appointments. This is the first required step and is highlighted below.
- Outreach Pool Scheduler – Schedule recipients from the Outreach Pool.
- Outreach Rosters – Manage appointment rosters, finalize recipient scheduling by printing invitation letter, and manage attendance to track cooperation and non-cooperation.



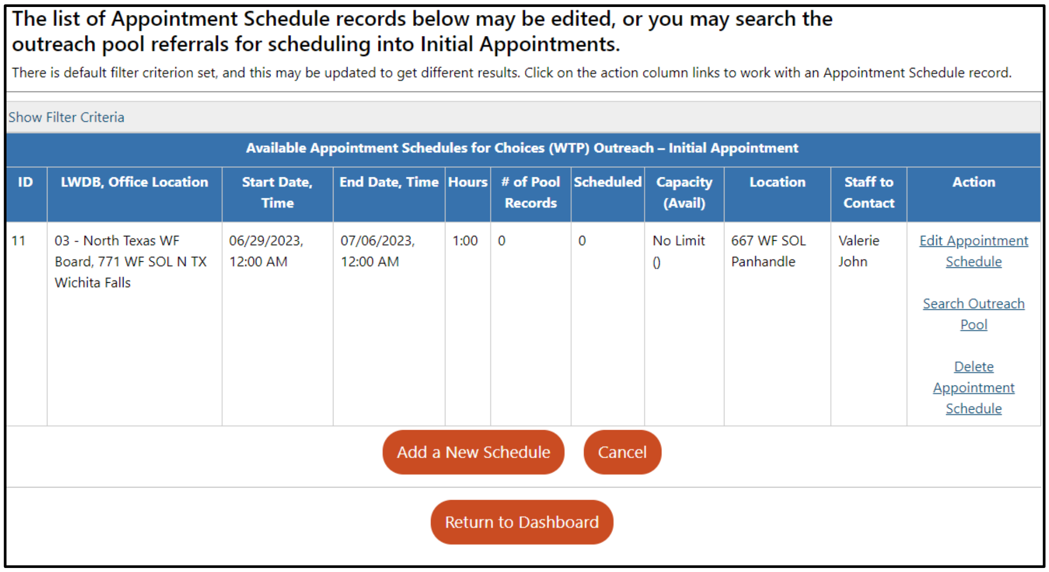
Outreach Pool Options

Appointment Schedules Overview

The Appointment Schedules option will allow staff members to manage appointment options for Choices and SNAP E&T applicants and participants. From the Appointment Schedules screen, staff members can do the following:

- Create (Add) appointment sessions for initial appointments.
- Edit/Modify existing appointments.
- Delete appointments.
- Search Outreach Pool for individuals to schedule.

Note: The process for creating and editing appointments is the same, regardless of program selection. The images below are sampled from the Choices program.


The list of Appointment Schedule records below may be edited, or you may search the outreach pool referrals for scheduling into Initial Appointments.

There is default filter criterion set, and this may be updated to get different results. Click on the action column links to work with an Appointment Schedule record.

Show Filter Criteria

Available Appointment Schedules for Choices (WTP) Outreach – Initial Appointment

ID	LWDB, Office Location	Start Date, Time	End Date, Time	Hours	# of Pool Records	Scheduled	Capacity (Avail)	Location	Staff to Contact	Action
11	03 - North Texas WF Board, 771 WF SOL N TX Wichita Falls	06/29/2023, 12:00 AM	07/06/2023, 12:00 AM	1:00	0	0	No Limit ()	667 WF SOL Panhandle	Valerie John	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule

Add a New Schedule | Cancel

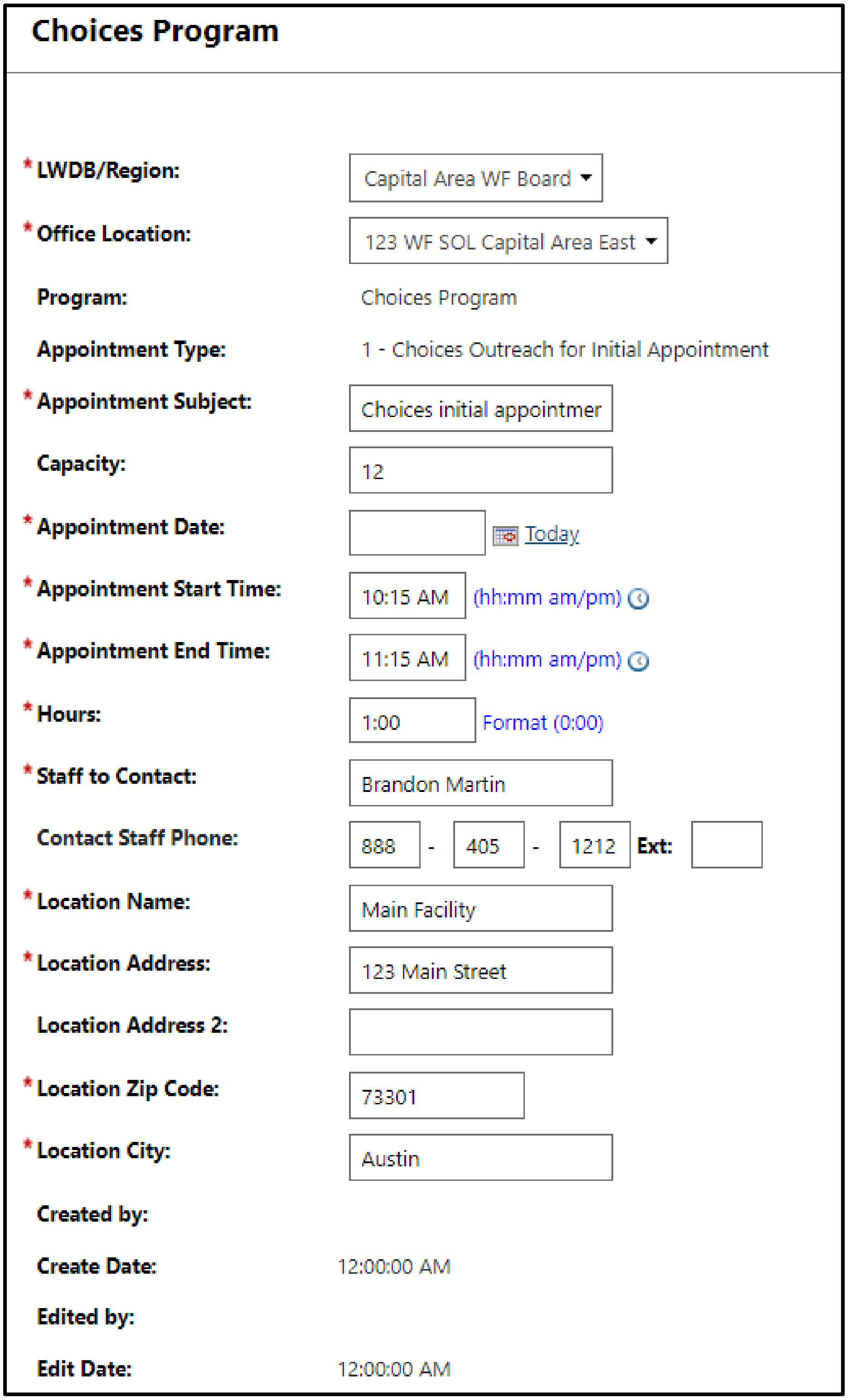
Return to Dashboard

Outreach Pool Appointment Scheduling Window

Adding a new Scheduled Appointment

TWC staff will continue the practice of creating **Office Schedules** in the form of Appointment Schedules in WIT. These records will hold details about the appointment, reserve time on staff calendars for scheduled dates and times, and to which scheduled recipients will be added onto rosters. This is part of the management of the 7-day response requirement for mandatory recipients.

1. From the Appointment Schedules Screen, click the Add a New Schedule button to create a new event. The Program Appointment Schedule Record Screen displays (pictured below).
2. Appointment Schedule Record Entry Screen with required fields marked with red asterisks.



Choices Program

* LWDB/Region:	Capital Area WF Board
* Office Location:	123 WF SOL Capital Area East
Program:	Choices Program
Appointment Type:	1 - Choices Outreach for Initial Appointment
* Appointment Subject:	Choices initial appointmer
Capacity:	12
* Appointment Date:	Today
* Appointment Start Time:	10:15 AM (hh:mm am/pm)
* Appointment End Time:	11:15 AM (hh:mm am/pm)
* Hours:	1:00 Format (0:00)
* Staff to Contact:	Brandon Martin
Contact Staff Phone:	888 - 405 - 1212 Ext:
* Location Name:	Main Facility
* Location Address:	123 Main Street
Location Address 2:	
* Location Zip Code:	73301
* Location City:	Austin
Created by:	
Create Date:	12:00:00 AM
Edited by:	
Edit Date:	12:00:00 AM

Appointment Schedule Record Entry Screen

3. Starting with LWDB/Region and Office location, enter the required information for the event.
4. Enter the appropriate **appointment subject**.
5. Enter the appointment **date and start time**.
6. Enter the **end time**.
7. Verify the **number of hours**.
8. Enter a **contact name**, selecting from the presented options.
9. Enter a **location name**, selecting from the presented options.
10. Once the necessary information is entered and all required fields are addressed, click the **Save** button to create the appointment.

The page will automatically refresh and return the staff member to the Appointment Schedule Screen. Any existing appointments within the next 14 calendar days will display in the table (pictured below).

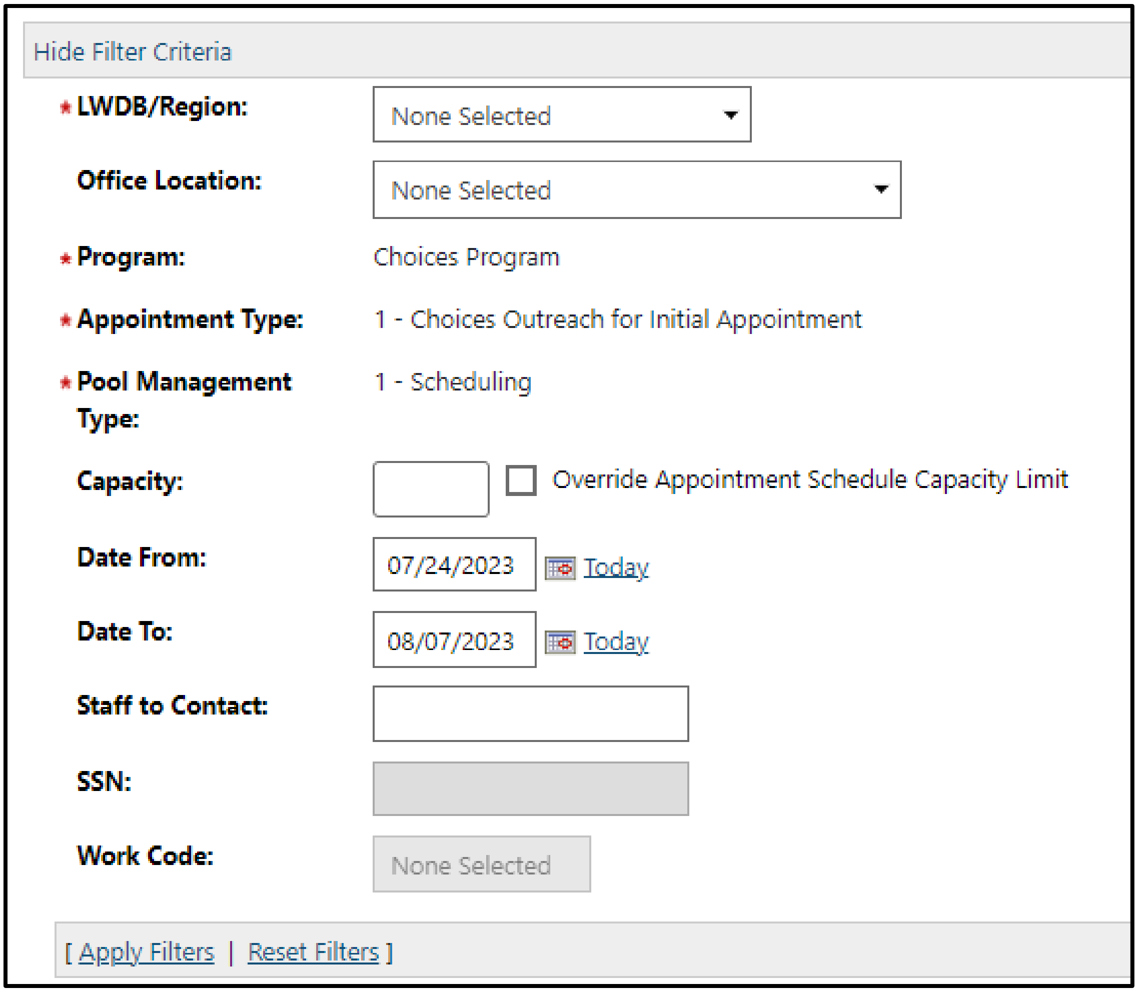
Available Appointment Schedules for Choices Outreach – Initial Appointment										
ID	LWDB, Office Location	Start Date, Time	End Date, Time	Hours	# of Pool Records	Scheduled	Capacity (Avail)	Location	Staff to Contact	Action
14	01 - Panhandle WF Board, 123 WF SOL Capital Area East	07/26/2023, 4:00 PM	07/26/2023, 5:00 PM	1:00	0	0	No Limit ()	854668 location		Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule
15	03 - North Texas WF Board, 771 WF SOL N TX Wichita Falls	07/24/2023, 8:00 AM	07/24/2023, 9:00 AM	1:00	0	0	No Limit ()	847529 Alameda	Michael Green	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule
17	01 - Panhandle WF Board, 6490 Central Texas Tele-center	07/26/2023, 8:00 AM	07/26/2023, 9:00 AM	1:00	0	0	10 (10)	North	Dani Richardson	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule

Appointment Schedule Screen

Filtering Scheduled Appointments

The default Appointment Schedule view will display all currently scheduled appointments for today plus 14 days. If staff members want to modify the information displayed, they can filter the results. There are no differences between SNAP and Choices.

1. Select the **Show Filter Criteria** link. The page will expand to show all filter options.
2. Modify the desired filters, paying close attention to the fields marked as required by a red asterisk.



Appointment Schedule Filters

3. Once all filters are entered/selected, click the **Apply Filters** link.
4. The table will refresh, showing results based on the criteria entered in the filters.

Search and Select Individuals within the Outreach Pool

Staff are responsible for scheduling applicants into appropriate appointments. The available applicants are entered into the Outreach Pool via interface. The records come directly from HHSC.

The system will execute a preliminary search of the Outreach Pool using the selected Appointment Schedule record, matching the LWDB/Region in the schedule record to recipients' assigned office LWDB/Region set during Interface processing (recipients may be scheduled into any office appointment schedule associated to the LWDB/Region).

Note: While the process of selecting and scheduling of Outreach Pool participants is identical between the two programs, SNAP E&T and Choices do have different column headers and codes. Examples of both programs are included below.

Customer Selection Preview - Office Choices (TANF) Outreach Pool Recipients

Appointment Subject:	Choices initial appointment
Office Location:	123 WF SOL Capital Area East
Start Date and Time:	10/31/2023 12:00 PM
End Date and Time:	10/31/2023 1:00 PM
Location:	Main Facility, 123 Main Street, Austin
Staff to Contact:	Brandon Martin
Capacity (Current Available):	25 (25)
Number Selected for Current List:	0 selected for Roster Scheduling

Show Filter Criteria

SSN	Client Name Client Number EDG Num	Contact HHSC Mailing/Phone	Type Program	Work Code	Choices Appld/Status	Choices Closed Status	WP App Status	Last Action	Action Select All
XXX-XX-2244	Garcia, Kevin 100212397 411212397	311 Bowie St AUSTIN, TX 78703 5127981512	61	M - Mandatory	10614 - Incomplete		WP RI Only	Pending	

Customer Selection Preview - SNAP Outreach Pool Recipients

Appointment Subject:	SNAP E & T initial appointment
Office Location:	123 WF SOL Capital Area East
Start Date and Time:	11/09/2023 11:15 AM
End Date and Time:	11/09/2023 12:15 PM
Location:	South Flores, 7445 South Flores, San Antonio Tx.
Staff to Contact:	John Marks
Capacity (Current Available):	10 (10)
Number Selected for Current List:	0 selected for Roster Scheduling

Show Filter Criteria

SSN	Client Name Client Number EDG Num	Contact HHSC Mailing/Phone	Work Code	SIG	SNAP Appld/Status	SNAP Closed Status	WP App Status	Last Action	Action Select All
XXX-XX-0018	Point, Wendy 100212378 411212378	, 512-555-1278	3 - Mandatory/Not working		0 - No open application		WP RI Only	Pending	

Outreach Pool Roster Selection with Filter Highlighted

To schedule an individual from the Outreach Pool:

1. From the Appointment Schedule Table, select the **Search Outreach Pool** hyperlink from the Action column.

2. The Customer Selection Preview list appears as a table. The most recent records will display first, based on the filter criteria selected. No action has been taken at this time.

3. To widen or modify the search criteria used to create this list, access the **Show Filter Criteria** hyperlink. The page will expand to show additional filter options.

4. To widen your search and pool more participants into the roster, or to narrow your search to specific categories of

individuals, make selections for the office location option and the Work Code options.

  a. For the widest possible search, change both categories above to **None Selected.**

Note: The users queried by this search are placed in a temporary table within the system, preventing other staff users from scheduling the individual.

5. Using the check box under the Action column to select individual users, select all appropriate individuals to include in the selected appointment. Follow all TWC policies on selection and location assignment.
6. Select the **Add to List** hyperlink to prepare records to roster assignment.
7. The Last Action column provides staff members with information about the current state of the individual.
   a. **Pending** means the record has been loaded into the temporary table, but no actions have been taken.
   b. **Pending Roster** means that the individual has been selected for addition to a roster.
   c. **Pending Letter** means that the individual has officially been saved to the appointment and the system is awaiting notification from the staff user that the required communication and compliance letter has been printed.

8. To save the selected individuals to the currently selected appointment, check the action box for all applicants and click the **Save to Roster** button.
9. To return all unselected recipients back to the pool and return to the Appointment Schedules Screen, click the **Return to Schedules** button.

Note: When an enrollee is added to the Roster for a scheduled SNAP E&T or Choices orientation, the system creates a partial application, and the application will display an **Incomplete** status. Staff may complete the partial application. The system also automatically creates a standard Case note for the orientation.

Printing Letters and Finalizing Scheduling

Once the appropriate appointments are selected for Choices or SNAP E&T Outreach Pool individuals, program applicants must be notified via a printed letter.

Note: An individual's attendance record cannot be finalized until a **Print Letter Date** exists within Roster Management.

To print the notification letter:

1. From the Outreach Management Page select the **Outreach Rosters** link. The Rosters List Landing Page will appear (pictured below). These pages are identical between programs.

+ Show Filter Criteria

Filter Criteria:

Dates From: 10/10/2022

Dates To: 10/14/2022

Staff to Contact:

Location Name:

Roster ID	Start Date & Time	End Date & Time	Hours	LWDB, Office Location	# Sched	Capacity (Avail)	Location	Staff Contact	Action
1523	10/7/2022, 10:00 am	10/7/2022, 12:00 pm	2	14 - Capital Area WF Board, 123 WF SOL Capital Area East	2	10 (**8**)	East Office 3401 Webberville Rd BLDG 1000 Austin, TX 78702	Firstname Lastname 999-999-9999	Roster Attendance Print Roster
1524	10/10/2022, 10:00 am	10/10/2022, 12:00 pm	2	14 - Capital Area WF Board, 125 WF SOL Capital Area South	3	15 (**12**)	South Office 6505 Burleson Rd Austin, TX 78744	Ann Landers 999-999-9999	Roster Attendance Print Roster
1525	10/11/2022, 1:00 pm	10/11/2022, 3:00 pm	2	14 - Capital Area WF Board, 125 WF SOL Capital Area South	3	10 (**7**)	South Office 6505 Burleson Rd Austin, TX 78744	Firstname Lastname 999-999-9999	Roster Attendance Print Roster
1526	10/12/2022, 1:00 pm	10/12/2022, 3:00 pm	2	14 - Capital Area WF Board, 129 WF SOL Capital Area North	10	**No Limit** ( )	North Office 9001 North IH-35, Suite 110E Austin, TX 78752	Firstname Lastname 999-999-9999	Roster Attendance Print Roster

Cancel

Return to My Dashboard

Outreach Roster List Landing Page

2. Depending on the current configuration for default search options, filters may need to be adjusted.

3. Select the **Show Filter** hyperlink to expand the filter options.

4. To properly search for meetings with rosters, select the appropriate LWDB/Region. Once you have made changes to the filter, select the **Apply Filter** hyperlink.

5. From the results page, identify which appointment that needs updating and select the **Manage Roster** hyperlink. The Roster Page will display.

Set Attendance Status: None Selected

Search:

Results View: **Summary** | Detailed

To sort on any column, click a column title.

State ID	Customer Name Client Number	HHCS Mailing Address/Phone Number	Type Program	Work Code	Choices ApplD/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
10860	Garcia Frank 5127981513	311 Bowie St AUSTIN, TX 78703 5127981513	61	1	10613-Incomplete		WP RI Only	Pending Letter	10/24/2023 John Marks	
10846	Palin Sarah 3522222354	1198 San Bernard St AUSTIN, TX 78708	61	1	10634-Incomplete		WP RI Only	Pending Letter	10/24/2023 John Marks	

Set Attendance Status: None Selected

Search:

Results View: **Summary** | Detailed

To sort on any column, click a column title.

State ID	Customer Name Client Number	HHCS Mailing Address/Phone Number	Type Program	Work Code	SNAP ApplD/Status	SNAP Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
10864	Tester Stan L	1709 Newfield Ln. Austin, TX 78703 512-555-7889		2	12808-Incomplete		WP RI Only	Pending Letter	11/2/2023 Brandon Martin	
10906	Vaughan Stevie Ray	2602 Rae Dell Ave Austin, TX 78704 512-555-0000		2	12809-Incomplete		WP RI Only	Pending Letter	11/2/2023 Brandon Martin	

Roster Pages for SNAP E&T and Choices

6. Select all individuals who need to have letters printed.

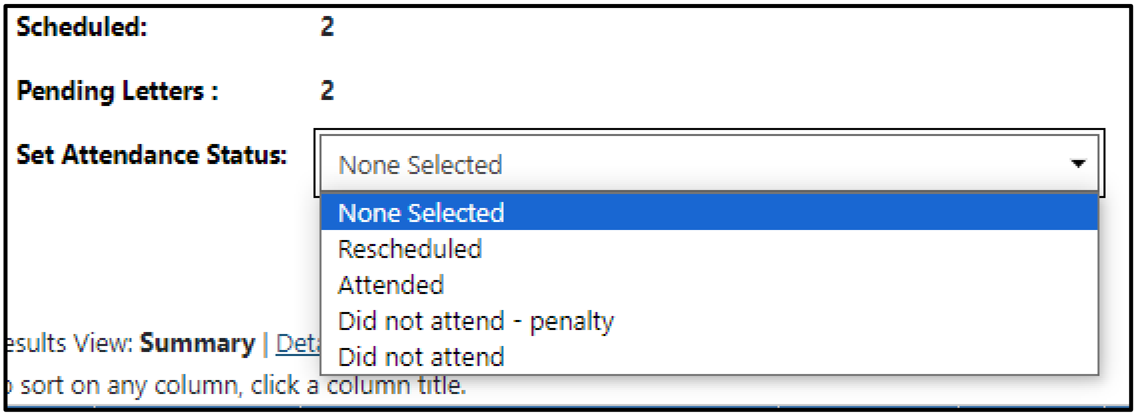
7. Once all users are selected, click the **Print Letters** button. This action officially starts the clock for tracking and

commits the appointment. The selected letters will move to the user’s browser’s downloads folder for saving or printing.

Note: The print letter button also flags the individual user’s profile to remove them from the Outreach Pool, preventing double scheduling.

Once the letter print date has generated and meetings have completed, staff members are able to enter attendance.

1. In the **Set Attendance Status** dropdown, select the status you are setting (Attended, Reschedule, Did Not Attend – Penalty, Did Not Attend).
2. From within the roster page, select all appropriate records for the Attendance Status you are attempting to set. EX: If the entire group of individuals attended, choose Select All. If only certain individuals attended, select the appropriate records.
3. Once all users are selected and status is set, click the **Update Selected Records** hyperlink.
4. Repeat the process for all individuals who need attendance updated by first selecting the Set Attendance Type, then checking the action column for the individual(s) and selecting the **Update Selected Records** hyperlink.



Attendance Status Options