

***WorkinTexas.com  
Choices and SNAP E&T  
Programs  
Outreach Pool Desk Aid***

1. Select the menu button to access the Left Navigation Menu.

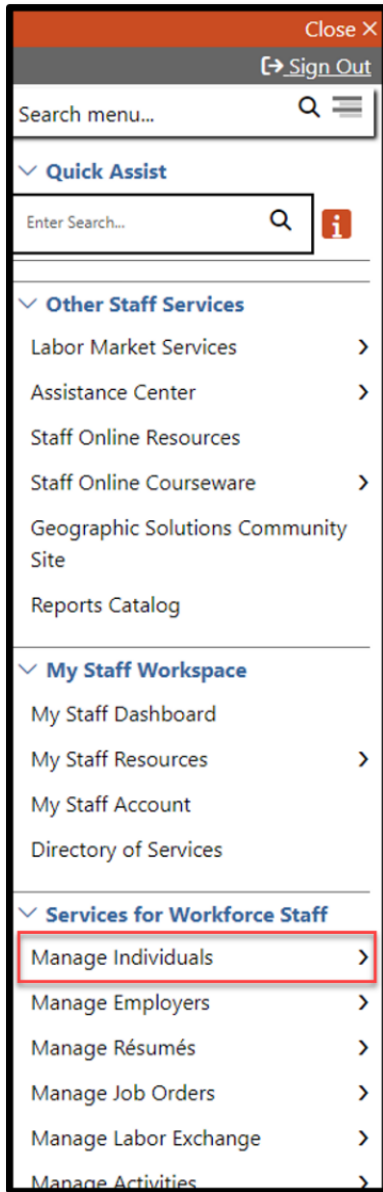


Figure 1: Screenshot showing Manage Individuals

## 2. Under Services for Workforce Staff, select **Manage Individuals**.

### Select **Manage Outreach Pool**.

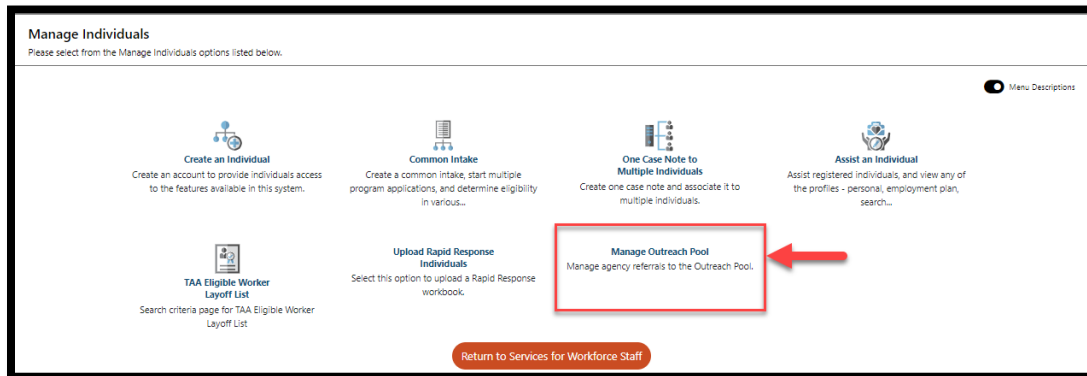


Figure 2: Screenshot of Manage Outreach Pool

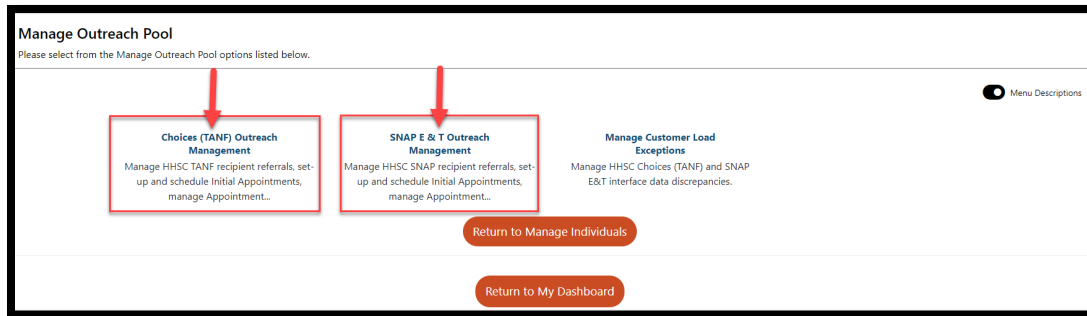


Figure 3: Screenshot of SNAP and Choices Outreach Pool Menus

**Note:** SNAP E&T and Choices Outreach Pools are both managed within the **Manage Outreach Pool Menu**.

## Outreach Management – Choices

### 1. Select **Choices (TANF) Outreach Management.**

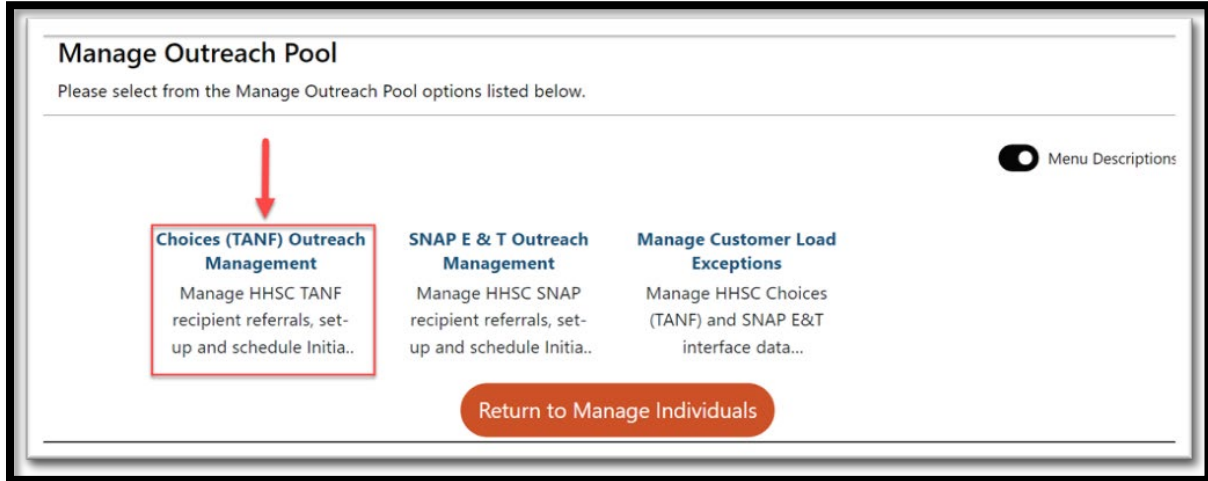


Figure 4: Screenshot of Choices (TANF) Outreach Management Link

### 2. Select **Choices (TANF) Appointment Schedules.**

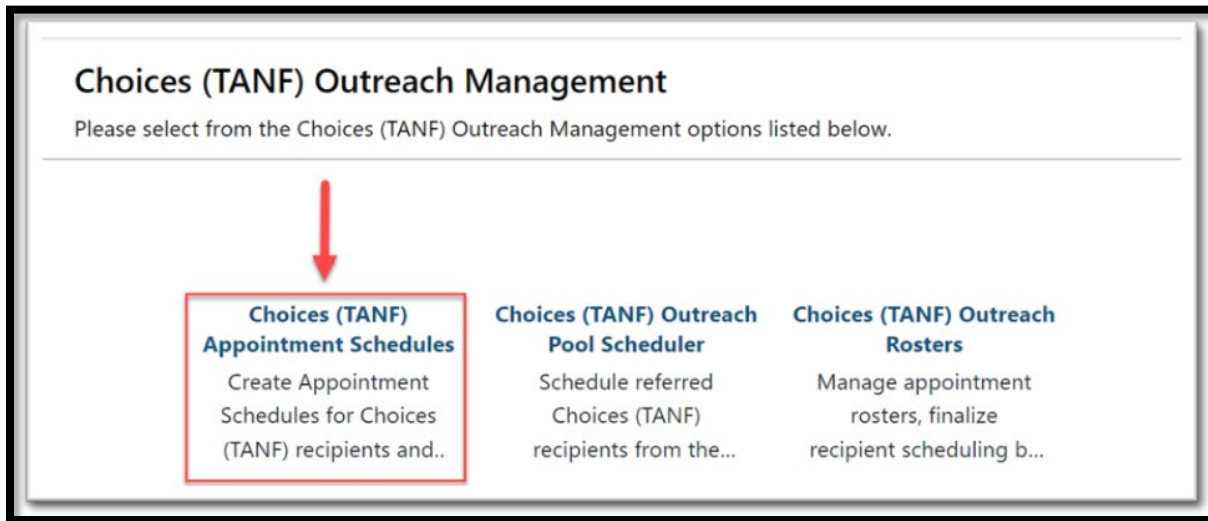


Figure 5: Screenshot of Choices (TANF) Appointment Schedules Link

3. The **Choices (TANF) Appointment Schedules** page will populate. To avoid creating multiple Schedules for the same event, select **Filter Criteria**.

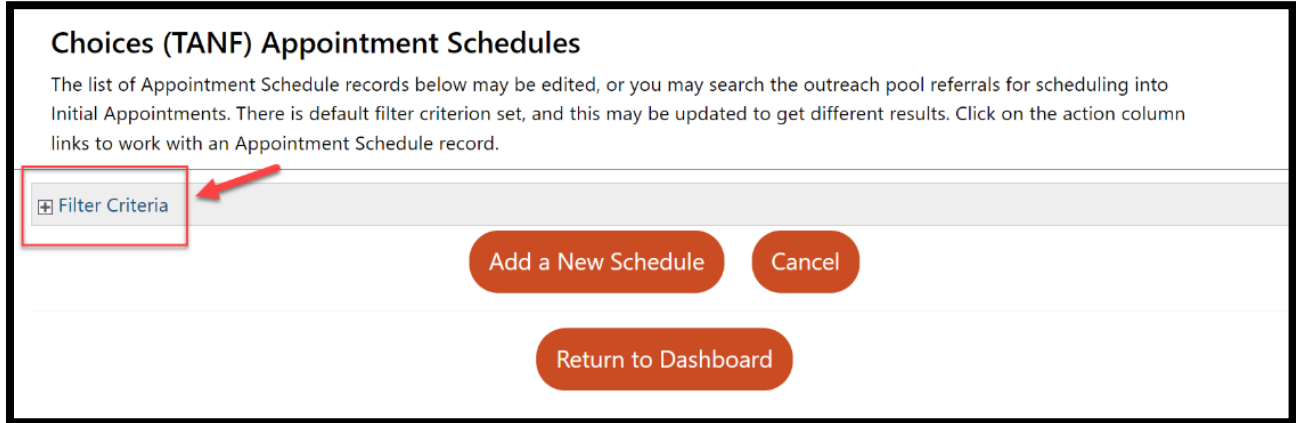


Figure 6: Screenshot of Choices (TANF) Schedules Page with an Arrow Pointing to Filter Criteria

4. Modify the fields as appropriate.

Figure 7: Screenshot of Fields to be Modified

## 5. Select **Apply Filters**.

Date To:  [Today](#)  
 Staff to Contact:   
 SSN:   
 Work Code:   
[Apply Filters](#) [Reset Filters](#)

[Add a New Schedule](#) [Cancel](#)

Figure 8: Screenshot with Arrow Pointing to Apply Filters Link

**NOTE:** A list of Appointment Schedule records will display. If an Appointment Schedule exists with the required dates, skip to step 8. If an Appointment Schedule does not exist proceed to step 6 below to Add a New Schedule.

## 6. Scroll down and select **Add a New Schedule**.

Start Date	End Date	Start Time	Duration	Count
04/29/2024, 9:00 AM	04/29/2024, 12:00 PM	3:00	14	23
				40 (17)

[Add a New Schedule](#) [Cancel](#)  
[Return to Dashboard](#)

Figure 9: Screenshot Showing Add New Schedule Link

7. Complete all the required fields to add a new **Appointment Schedule** record and Select **Save**.

**Add Schedule**  
Please fill in the information below to complete the Appointment Schedule record for the Choices program.

Choices Program

\* LWDB/Region: None Selected

\* Office Location: None Selected

Program: Choices Program

Appointment Type: 1 - Outreach for Initial Appointment

\* Appointment Subject: Choices initial appointment

Capacity:

\* Appointment Date:  Today

\* Appointment Start Time: 12:00 AM (hh:mm am/pm)

\* Appointment End Time: 12:00 AM (hh:mm am/pm)

\* Hours: 1:00 Format (0:00)

\* Staff to Contact:

Contact Staff Phone:  -  -  Ext:

\* Location Name:

\* Location Address:

Location Address 2:

\* Location Zip Code:

\* Location City:

Created by:

Create Date: 12:00:00 AM

Edited by:

Edit Date: 12:00:00 AM

**Save** **Cancel** **Delete**

Figure 10: Screenshot of Appointment Schedule Record

8. From the Appointment Schedule Screen, select **Search Outreach Pool**

[ Apply Filters | Reset Filters ]

Search:

ID	LWDB, Office Location	Start Date, Time	End Date, Time	Hours	# of Pool Records	Scheduled	Capacity (Avail)	Location	Staff to Contact	Action
		04/29/2024, 9:00 AM	04/29/2024, 12:00 PM	3:00	3	3	20 (17)	Workforce Solutions		<a href="#">Edit Appointment Schedule</a> <a href="#">Search Outreach Pool</a> <a href="#">Delete Appointment Schedule</a>

Figure 11: Screenshot Showing the Select Outreach Pool

9. From the **Outreach Pool Scheduler** page, select **Show Filter Criteria**.

The screenshot shows a web interface titled "Choices (TANF) Outreach Pool Scheduler" with a sub-header "Customer Selection Preview - Office Choices (TANF) Outreach Pool Recipients". The main content area lists appointment details: Appointment Subject, Office Location, Start Date and Time (04/25/2024 12:00 AM), End Date and Time (04/25/2024 12:00 AM), Location, Staff to Contact, Capacity (Current Available) (No Limit), and Number Selected for Current List (0 selected for Roster Scheduling). At the bottom left, a button labeled "Show Filter Criteria" is highlighted with a red box, and a red arrow points to it from the right.

Figure 12: Screenshot of Show Filter Criteria Link

10. Modify the desired filters and select **Apply Filters**.

The screenshot shows a web interface titled "Hide Filter Criteria". It contains several filter fields: LWDB/Region, Office Location (dropdown), Program (Choices), Appointment Type (1 - Outreach for Initial Appointment), Date From (Today), Date To (04/19/2024 Today), Work Code (M - Mandatory dropdown), Application Closed Status (radio buttons: All, No Case Closure, Case Closed Only), Limit records to, SSN, Client Number, and EDG Number. At the bottom left, a button labeled "[ Apply Filters | Reset Filters ]" is highlighted with a red box, and a red arrow points to it from the top left.

Figure 13: Screenshot of Apply Filters Link



11. Select all appropriate records to include in the **Scheduled Appointment** by using the check box under the **Action** column.

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
			01	M - Mandatory	11964999 - Complete		WP RI Only	Pending	<input checked="" type="checkbox"/>
			01	M - Mandatory	11961331 - Complete		WP Enrolled	Pending	<input checked="" type="checkbox"/>

Figure 14: Screenshot of Action Checkbox

12. Scroll down and select **Add to List** to add records to a temporary table for roster assignment.

			01	J - DELETED Too remote to effectively participate			No open WP	Pending	<input type="checkbox"/>
			01	G - Single parent/caretaker relative caring for a child under age 1			No open WP	Pending	<input type="checkbox"/>

[Remove from List]    [Add to List]    [Print Preview List]

Save to roster    Return to schedules

Return to My Dashboard

Figure 15: Screenshot of Add to List Hyperlink

**Note:** 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.

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
			01	G - Single parent/caretaker relative caring for a child under age 1	11970668 - Complete		No open WP	Pending	<input type="checkbox"/>

Figure 16: Screenshot of Pending Note in Last Action Column

- b. **Pending Roster** means that the record is waiting to be added to the roster.

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
			01	M - Mandatory	11964999 - Complete		WP RI Only	Pending Roster	<input type="checkbox"/>
			01	M - Mandatory	11961331 - Complete		WP Enrolled	Pending Roster	<input type="checkbox"/>

Figure 17: Screenshot of Pending Roster Note in Last Action Column

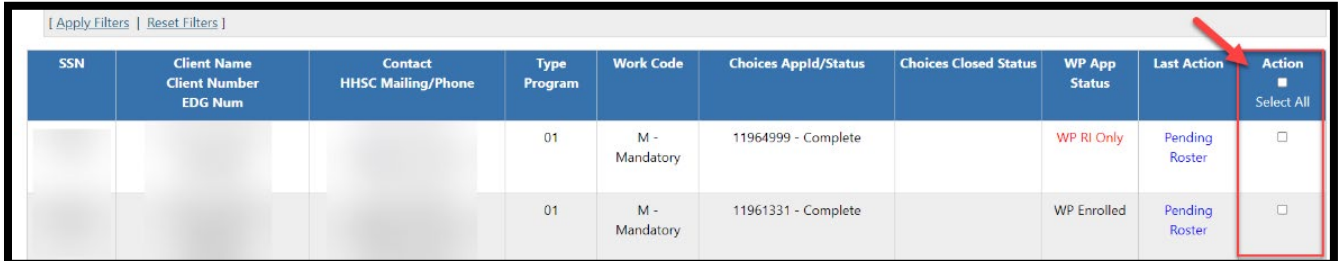
- c. **Pending Letter** means that the record has been added to the roster and is waiting for the letter to be printed.

Results View: **Summary** | Detailed  
To sort on any column, click a column title. Current Sort: *Work Code ascending*

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppId/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
			01-TANF cash assistance and Medicaid	M-Mandatory	11950985- Enrolled		WP Enrolled	Pending Letter		<input type="checkbox"/>
			01-TANF cash assistance and Medicaid	M-Mandatory	11958965- Enrolled		WP Enrolled	Pending Letter		<input type="checkbox"/>

Figure 18: Screenshot of Pending Letter in Last Action Column

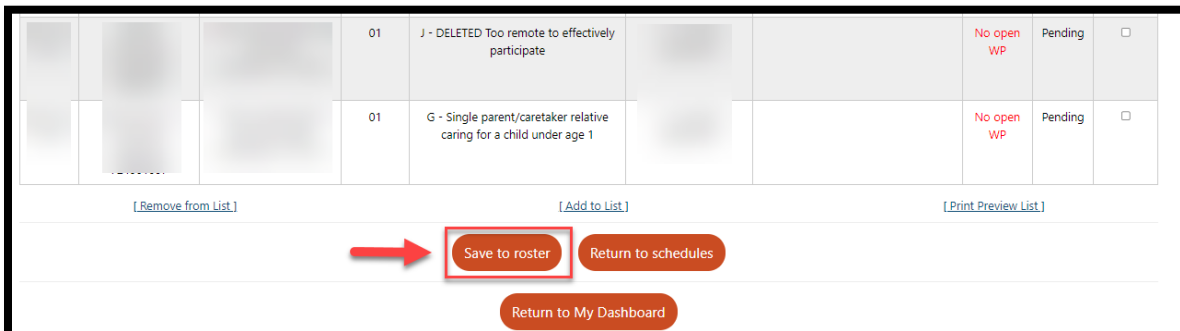
13. To add records to a roster, check the **action box** in **Action** column.



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
			01	M - Mandatory	11964999 - Complete		WP RI Only	Pending Roster	<input type="checkbox"/>
			01	M - Mandatory	11961331 - Complete		WP Enrolled	Pending Roster	<input type="checkbox"/>

Figure 19: Screenshot of Action Box Under Action

14. Scroll page down and select **Save to Roster**.



			01	J - DELETED Too remote to effectively participate			No open WP	Pending	<input type="checkbox"/>
			01	G - Single parent/caretaker relative caring for a child under age 1			No open WP	Pending	<input type="checkbox"/>

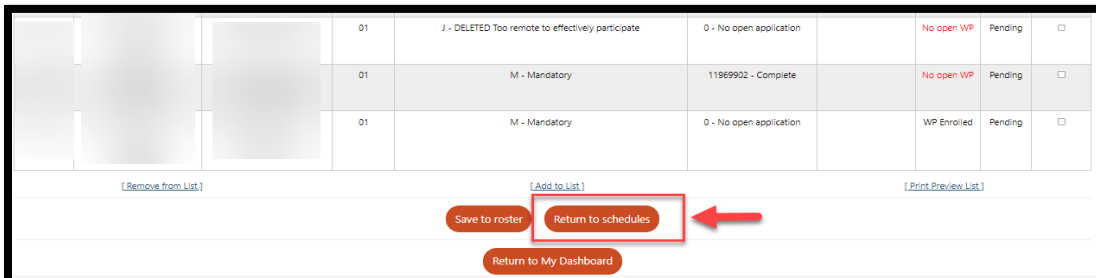
[Remove from List] [Add to List] [Print Preview List]

Save to roster Return to schedules

Return to My Dashboard

Figure 20: Screenshot of Save to Roster Button (Link)

15. To return all unselected recipients back to the pool and return to the **Appointment Schedules Screen**, click the **Return to Schedules**.



			01	J - DELETED Too remote to effectively participate	0 - No open application		No open WP	Pending	<input type="checkbox"/>
			01	M - Mandatory	11969902 - Complete		No open WP	Pending	<input type="checkbox"/>
			01	M - Mandatory	0 - No open application		WP Enrolled	Pending	<input type="checkbox"/>

[Remove from List] [Add to List] [Print Preview List]

Save to roster Return to schedules

Return to My Dashboard

Figure 21: Screenshot of the Return to Schedules Button (Link)

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

16. To print Outreach letters, return to the **Choices (TANF) Outreach Management** Page and select the **Choices (TANF) Outreach Rosters**.

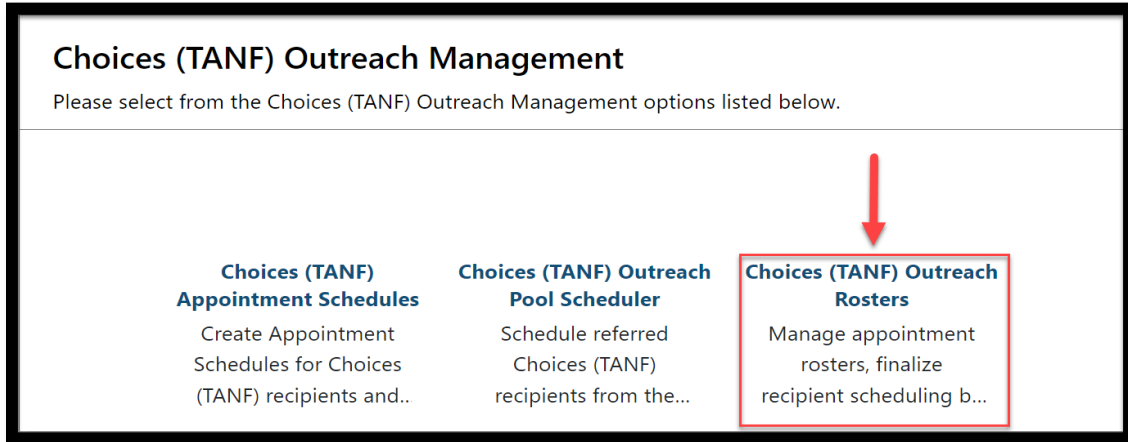


Figure 22: Screenshot of Choices (TANF) Outreach Rosters Link

17. Select **Filter Criteria**.



Figure 23: Screenshot of Filter Criteria Link

18. Under **Filter Criteria**, modify the desired filters and select the **Apply Filters**.

Figure 24: Screenshot of Filter Criteria with the Apply Filter Link

19. Identify which appointment that needs updating and select the **Manage Roster**.

Roster ID	Start Date & Time	End Date & Time	Hours	LWDB_Office Location	#Sched	Capacity(Avail)	Location	Staff Contact	Action
3021116	4/2/2024 9:00:00 AM	4/2/2024 10:00:00 AM	1:00		1	No Limit ()			Manage Roster Print Roster
3021117	1/2/2024 8:00:00 AM	1/2/2024 12:00:00 AM	4:00		8	No Limit ()			Manage Roster Print Roster
3024456	3/1/2024 1:00:00 PM	3/1/2024 3:00:00 PM	2:00		2	No Limit ()			Manage Roster Print Roster
3024457	3/15/2024 1:00:00 PM	3/15/2024 3:00:00 PM	2:00		0	No Limit ()			Manage Roster Print Roster

Figure 25: Screenshot of Manage Roster Link under the Action Column

20. Using the check boxes under the **Action** column, check records in **Pending Letter Status** to print letters.

Results View: **Summary** | Detailed  
To sort on any column, click a column title. Current Sort: *Work Code ascending*

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All <input type="checkbox"/>
			01-TANF cash assistance and Medicaid	M-Mandatory	11950985-Enrolled		WP Enrolled	Pending Letter		<input type="checkbox"/>
			01-TANF cash assistance and Medicaid	M-Mandatory	11958965-Enrolled		WP Enrolled	Pending Letter		<input type="checkbox"/>

Figure 26: Screenshot of Action Column to Select Letters to Print

21. Scroll down and select **Print Letters**.

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All <input type="checkbox"/>
			01-TANF cash assistance and Medicaid	E-Unable to work due to mental/physical disability > 180 days	11961931-Enrolled	Close Date: Mar 1 2024 12:00AM Close Reason: Services provided	WP Enrolled	Pending Letter		<input checked="" type="checkbox"/>
			01-TANF cash assistance and Medicaid	M-Mandatory	11958695-Enrolled	Close Date: Mar 1 2024 12:00AM Close Reason: Services provided	WP Enrolled	Pending Letter		<input checked="" type="checkbox"/>

[ Update Selected Records ] [ Remove from Roster List ] [ Print Roster ]

Cancel Print Letters

Figure 27: Screenshot of Print Letters Button (Link)

**Note:** The print letter button officially schedules the appointment and removes the referral from the Outreach Pool. The system creates a partial application, and the application will display an **Incomplete** status. Staff may complete the partial application when the recipient attends the Initial Appointment.

22. To **Set Attendance Status** dropdown, select the status you are setting (**Attended, Reschedule, Did Not Attend – Penalty, Did Not Attend**).

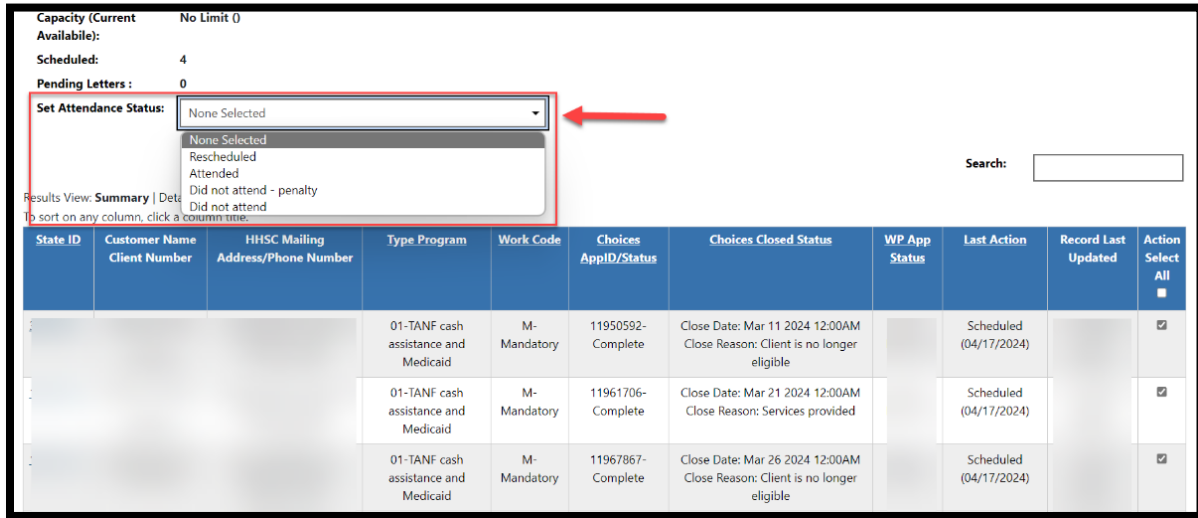


Figure 28: Screenshot of Set Attendance Status Dropdown

23. Select all appropriate records for the **Attendance Status** under the **Action** column.

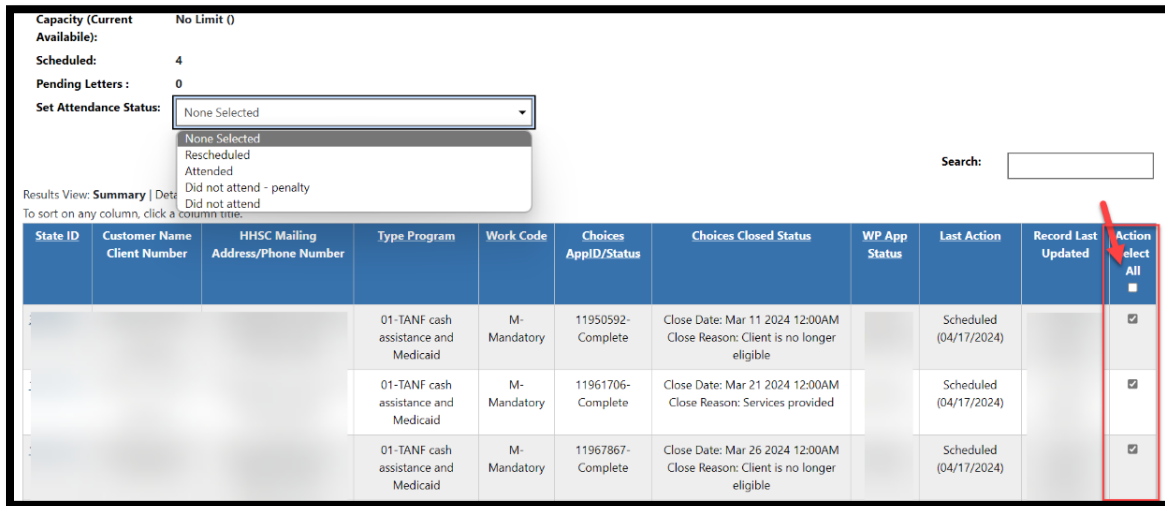


Figure 29: Screenshot of Action Column

24. Once records are selected and status is set, click the **Update Selected Record**.

Results View: **Summary** | Detailed  
 To sort on any column, click a column title. Current Sort: *Work Code ascending*

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
			01-TANF cash assistance and Medicaid	G-Single parent/caretaker relative caring for a child under age 1	11950299-Enrolled		WP Enrolled	Scheduled (03/25/2024)		<input type="checkbox"/>
			01-TANF cash assistance and Medicaid	K-Mandatory - Pending an appeal on TANF sanction	11955345-Enrolled		WP Enrolled	Scheduled (10/31/2023)		<input type="checkbox"/>

[ Update Selected Records ] [ Remove From Roster List ] [ Print Roster ]

Figure 30: Screenshot of Update Selected Records Hyperlink

25. 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.

Scheduled: 2  
 Pending Letters : 2

**Set Attendance Status:**

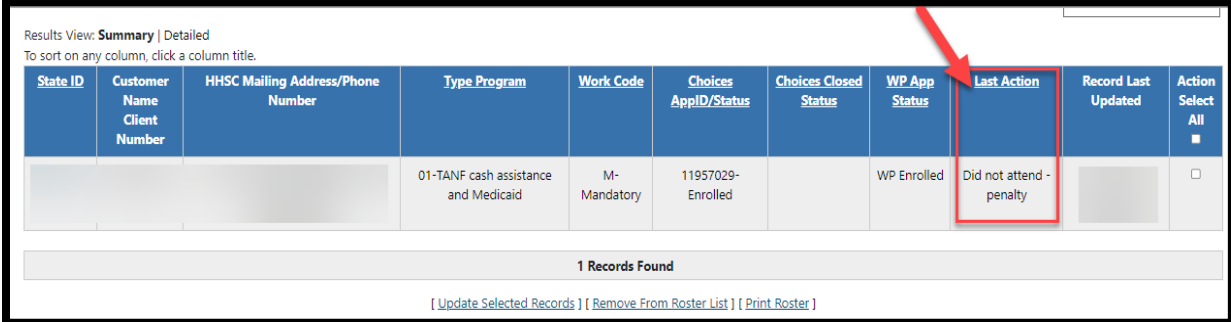
- None Selected
- None Selected
- Rescheduled
- Attended
- Did not attend - penalty
- Did not attend

Results View: **Summary** | Detailed  
 To sort on any column, click a column title.

Figure 31: Screenshot of Set Attendance Drop Down Menu



26. The **Summary** roster will display each staff action under the **Last Action** column.



Results View: **Summary** | Detailed  
To sort on any column, click a column title.

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All ■
			01-TANF cash assistance and Medicaid	M- Mandatory	11957029- Enrolled		WP Enrolled	Did not attend - penalty		<input type="checkbox"/>

1 Records Found

[\[ Update Selected Records \]](#) [\[ Remove From Roster List \]](#) [\[ Print Roster \]](#)

Figure 32: Screenshot of Summary Roster

## Outreach Management – SNAP E&T Program

1. Select the **SNAP E&T Outreach Management** link.

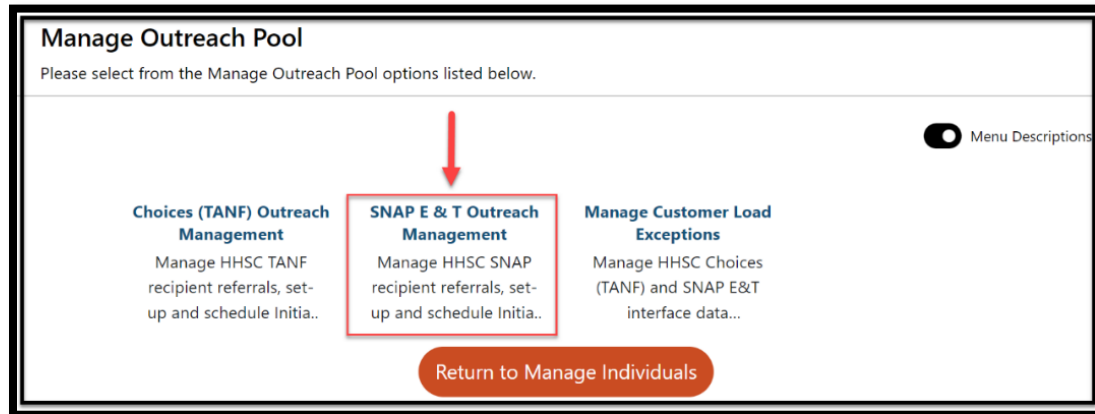


Figure 33: Screenshot of Snap E&T Outreach Management Link

2. Select the **SNAP E&T Appointment Schedules** link.

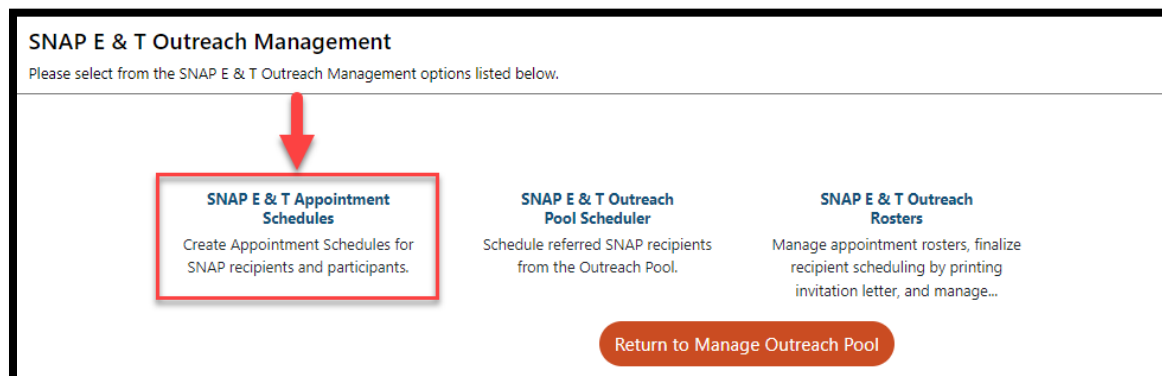


Figure 34: Screenshot of SNAP E&T Appointment Schedules Link

**Note:** The process for managing the outreach pool for SNAP E&T program is identical to the Choices Program. Return to page 3 of this desk aid under **Outreach Management – Choices** and continue all steps using **SNAP E&T Program filter** instead of the Choices Program.