WorkinTexas.com SNAP Employment & Training (E&T) Exercise Workbook

Prepared 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

Training and Development Department

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Contents

SNAP E&T Program: Case Management Training

This manual contains the exercises for the WorkinTexas.com (WIT) SNAP Employment & Training class.

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

Note: The data, examples, and images in this manual are taken from the training database system and do not contain any Personal Information (PII). The job seekers, employers and companies identified in exercises 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 **<u>underlined</u>**.
- 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:
WIT Case Management Training Site

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

To Login as staff, follow these steps:

1. From the Home Page, click the **Sign In / Register** button.
2. In the Username field, enter the username provided by your instructor.
3. In the Password field, enter the password provided by your instructor.
4. Select **I'm not a robot** checkbox for reCAPTCHA, if applicable.
5. Click **Sign In**.
6. Review Staff Sign-in Notice text.
7. Click **I agree**.

Exercise #2: Client System Registration

Objective: Create a fictitious individual for the purpose of SNAP E&T case management training.

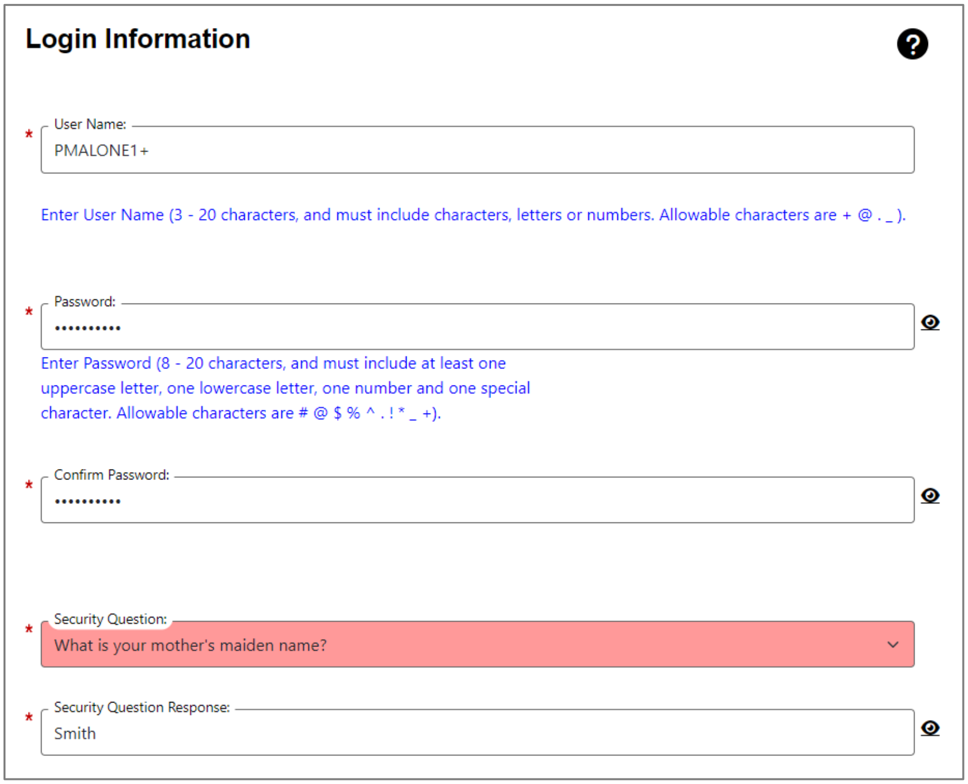
Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and accessing My Staff Dashboard.

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

Note: For this exercise, you will create your own fictitious individual. Except where noted, you will make up the information for the individual you are creating.

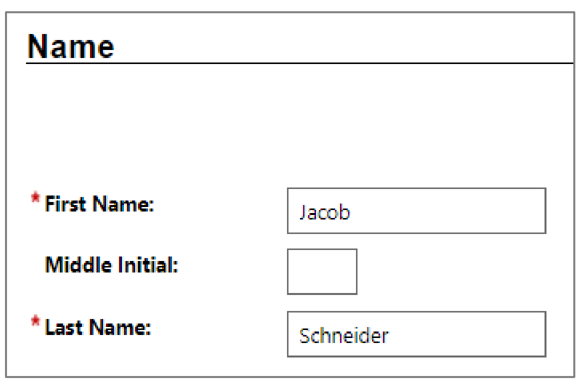
To create an individual account:

1. Select the **Create an Individual** link 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, **Trainingpassword@1.**
4. Choose a security question and enter **123** as the response.



Login Information Section of Create Individual Account Process

5. In the Name section, enter the individual's first and last name. Do not use your name. You can make this up.

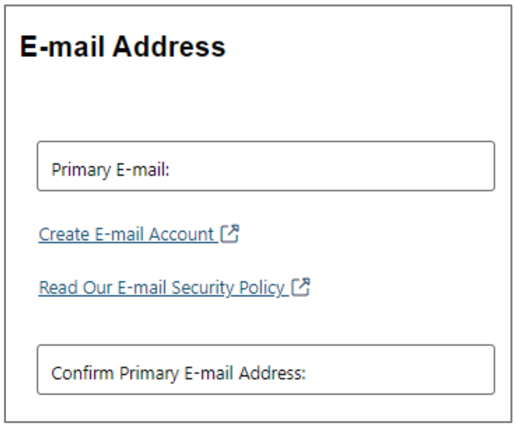


Name Section of Create Individual Account Process

6. In the Social Security Number section, select the **I do not wish to provide my Social Security Number** checkbox.

7. In the Phone Number section, enter the individual’s primary phone number **(Create a fictitious local phone number)**.

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).**



Email Address Section of Create Individual Account Process

9. In the Primary Location Information section, select the individual’s country of residence, **United States.**

10. Select whether they are authorized to work in the U.S.? Select **Yes**.


Primary Location Information

*Country: United States

*Are you authorized to work in the United States? Yes / No

Primary Location Information Section of Create Individual Account Process

11. In the Residential Address section, select whether the individual is homeless, select **No**.

12. Enter their address details accordingly **(Enter a local ZIP Code)**.

13. Verify the City field.

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

15. Verify the County.

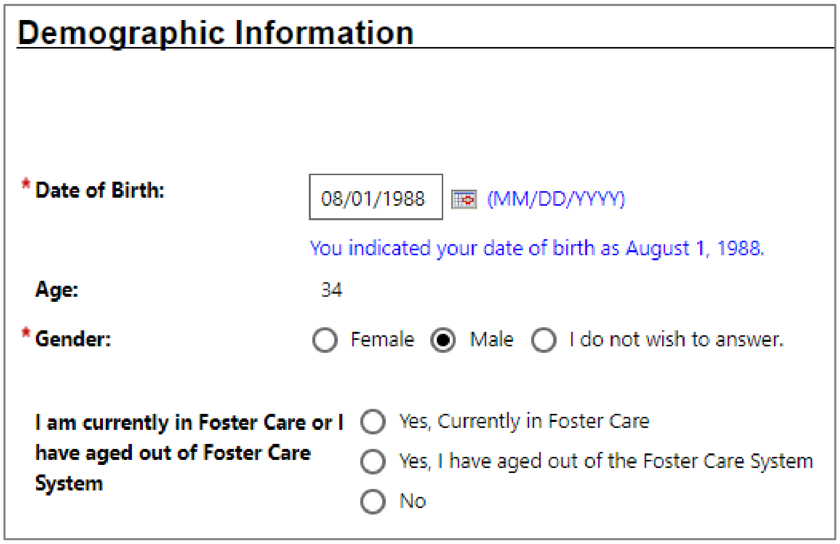
16. Verify Country is **United States**.

17. In the Demographic Information section, enter the individual's date of birth (MM/DD/YYYY) format of **08/01/1988**.

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 the Foster Care System.

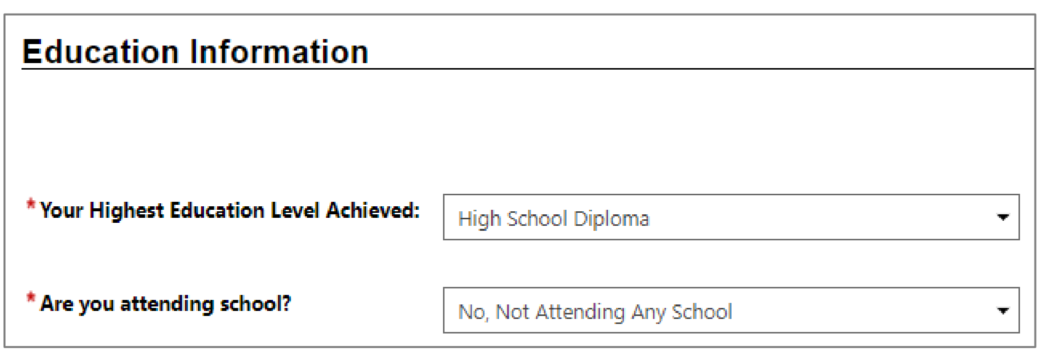


Demographic Information Section of Create Individual Account Process

20. In the Citizenship section, indicate the individual's citizenship status. Select **Citizen of U.S. or U.S. Territory.**

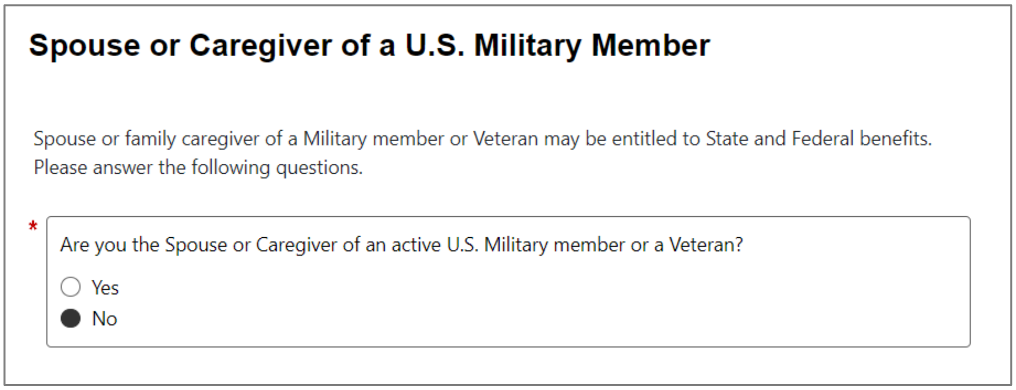
21. In the Disability section, select **No, I do not have a disability.**

22. In the Education Information section, select the individual's highest education achievement level, **High School Diploma,** and their current school status, **No, not attending any school**.



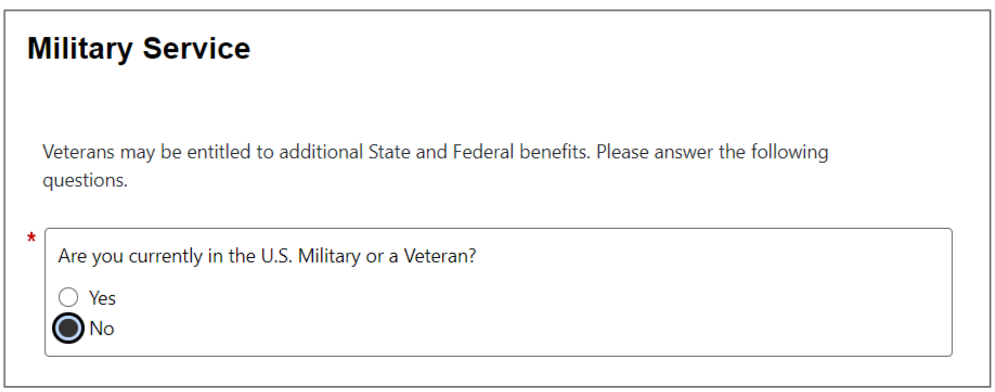
Education Information Section of Create Individual Account Process

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



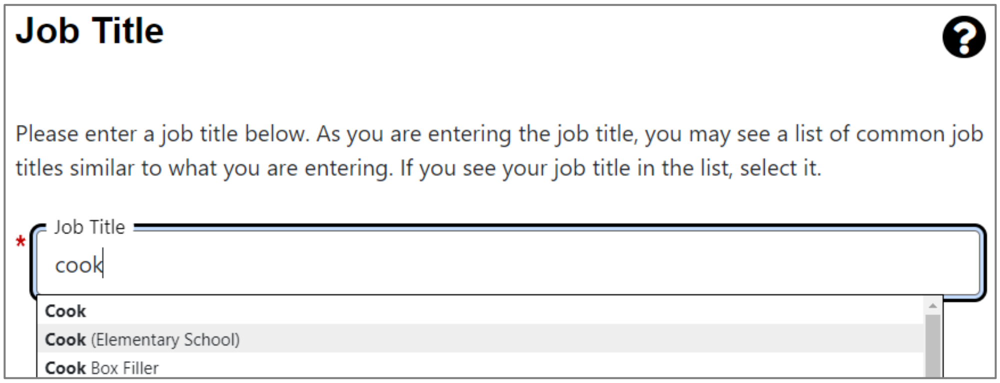
Spouse or Caregiver of a Military Member Section of Create Individual Account Process

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



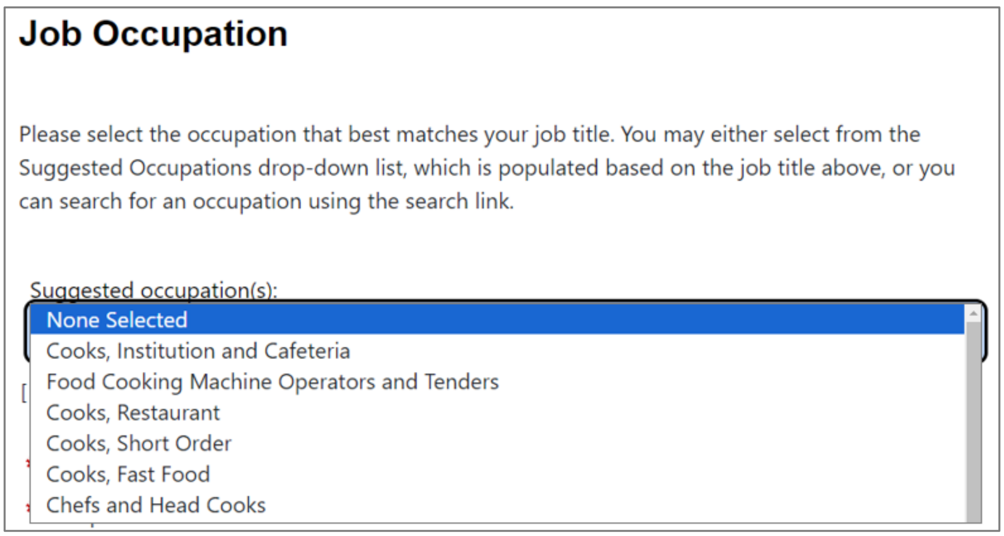
Military Service Section of Create Individual Account Process

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



Job Title Section of Create Individual Account Process

26. In the Job Occupation section, select **Cooks, Fast Food**.

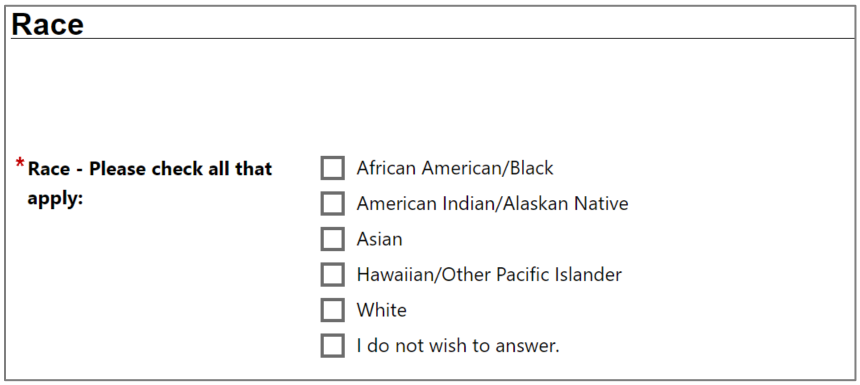


Job Occupation Section of Create Individual Account Process

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.

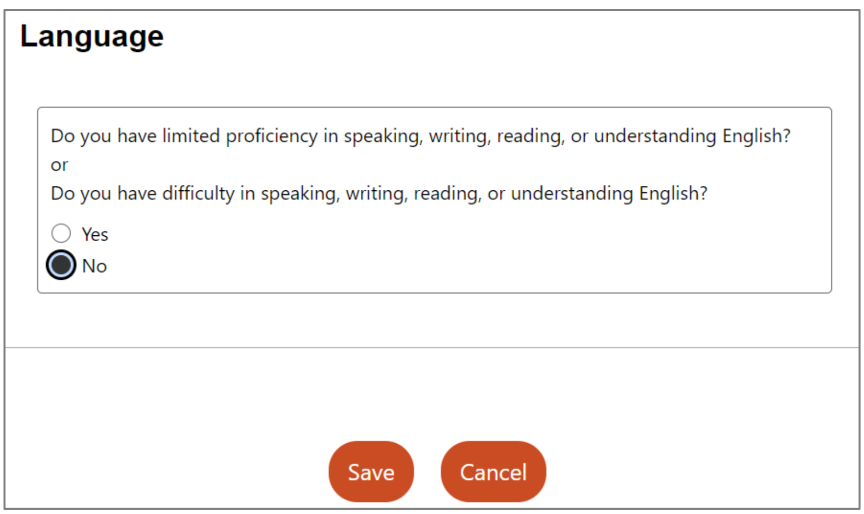
27. In the Ethnic Origin section, select whether the individual is Hispanic or Latino, (your choice).

28. In the Race section, select all races that apply (your choice).



Race Section of Create Individual Account Process

29. In the Language section, select **No**.

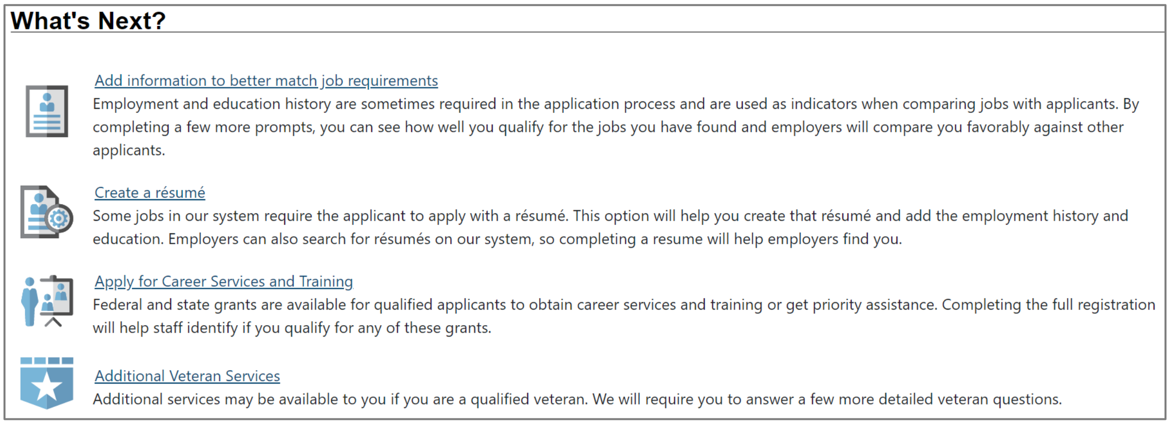


Language Section

30. Select the **Save** button 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 (see figure below).



Sample Registration Confirmation Page

Exercise #3: SNAP E&T Outreach Pool Management Options

Objective: Review the Outreach Pool for SNAP E&T.

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 SNAP E&T 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 SNAP E&T Case Management Training Guide.

Exercise #4: SNAP E&T Outreach Pool Appointment Scheduling

Objective: Review the Outreach Pool Appointment Schedules for SNAP E&T.

Assumption: You are in the WIT training environment at Texas Wit Training Site (opens in a new window) and accessed the SNAP E&T Outreach Pool management training documents.

Purpose: This exercise is necessary to demonstrate for staff who will be responsible for SNAP E&T 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 SNAP E&T Case Management Training Guide.

Exercise #5: SNAP E&T Outreach Pool Search and Roster Selection

Objective: Review the Outreach Pool search process and roster selection for SNAP E&T.

Assumption: You are in the WIT training environment at Texas Wit Training Site (opens in a new window) and accessed the SNAP E&T Outreach Pool management training documents.

Purpose: This exercise is necessary to demonstrate for staff who will be responsible for the SNAP E&T 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 SNAP E&T Case Management Training Guide.

Exercise #6: SNAP E&T Outreach Pool Roster Management

Objective: Review the Outreach Pool Roster Management process for SNAP E&T.

Assumption: You are in the WIT training environment at Texas Wit Training Site (opens in a new window) and accessed the SNAP E&T Outreach Pool management training documents.

Purpose: This exercise is necessary to demonstrate for staff who will be responsible for SNAP E&T 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 SNAP E&T Case Management Training Guide.

Exercise #7: SNAP E&T Application

Objective: Create and complete a SNAP E&T Application.

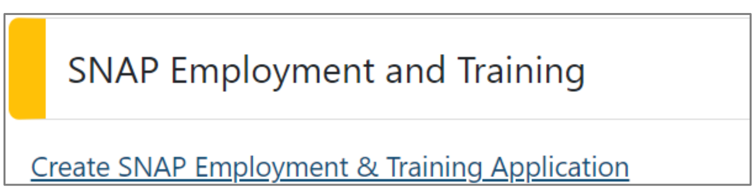
Assumption: You are in the WIT training environment at Texas WIT Training Site (opens in a new window) and are assisting your created participant.

Purpose: This exercise is necessary for staff to practice creating a SNAP E&T Application.

To create a SNAP E&T application:

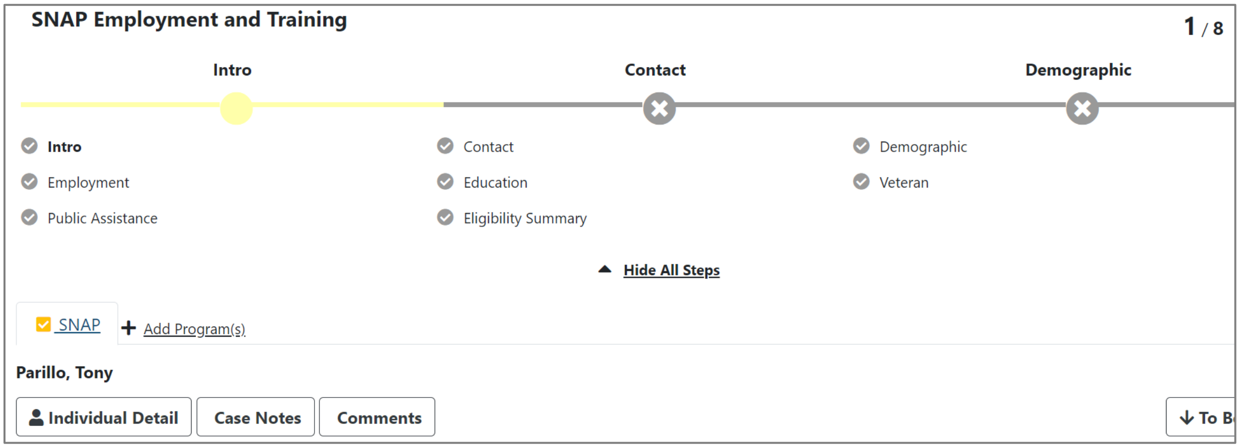
1. Click on the blue hyperlink of your individuals **Name**.
2. From the Currently Managing field. EX: **Spencer, Michael**.
3. Under Staff Profiles, expand each **plus sign icon** until they are all minus signs. Select **Programs**.
4. Scroll down to the **SNAP Employment and Training** section and click the **Create SNAP Employment & Training Application** link. The application wizard launches.

Note: Many of the fields are already prepopulated for you.



SNAP Employment & Training Application Link

Intro: Page 1 of 8



SNAP E&T Application Progress Bar Intro: Page 1 of 8

1. If not already populated, select **Today** for the Application Date.
2. Enter the Participation Type by selecting **Mandatory – Gen Pop** from the drop-down menu.
3. Enter the Initial Appointment Date by selecting **Today**.
4. Confirm that the LWDB/Region, Office Location, and Staff Position are accurate. If not select the appropriate answers.
5. Select the **Next** button, located at the bottom of the screen, to proceed to the next screen.

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 8

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. Add the required Primary Phone Type by selecting **Cell/Mobile Phone** from the drop-down menu.
3. If applicable, select the **Add New Contact** link to add a new contact to this account.
4. Select the **Next** button.

Demographic: Page 3 of 8

1. Confirm the Date of birth and gender information.
2. For U.S Citizenship Status, select **Citizen of US or US Territory.**
3. Select **No** for Hispanic/Latino Heritage.
4. Select Race (Ethnicity).
5. Select **No** for English Language Learner
6. Select **No** for Considered to have a disability.
7. Select the **Next** button to save your edits and proceed to the Employment Page.

Employment: Page 4 of 8

1. Add the Employment Status by selecting from the drop-down menu. Select **Unemployed**.
2. For Desired Occupation and Title #1, select the Search for O*Net Code link. A window will open. In the Keyword Search field, enter Chef. A list of options will appear. Select **Chefs and Head Cooks**.

3. For Type of Job Looking for, enter **Chef**, and select **Chef** from the menu bar that appears.
4. For Years of experience in this area, enter **2**.
5. For Type of employment desired, select **Regular** from the drop-down list.
6. For Full-time or part-time, select **Full-time**.
7. Under the Individual Employment History section, select the **Add Employment History** link. For this exercise, below are the answers for each field to complete this screen:
    i. **Employer Name**: **Burger King** (A pop-up window will open. Select the Burger King option which is the close to your region from the list that appears.)
    ii. **Job Title**: Cook

Note: After typing Cook, a menu will appear for you to select from. Select, **Cook** from the list.

    iii. **Suggested occupations**: Click the drop-down menu and Select, Cooks, Fast Food.
    iv. **Type of employment**: Regular
    v. **Full or part-time**: Full Time
    vi. **Gross Salary**: $25,000
    vii. **Salary is based upon**: Year.
    viii. **Date you began work**: 01/01/2021.
    ix. **Reason for Separation**: Layoff

x. **Last day worked**: 09/01/2023.

xi. **Job duties**:

1. Select the **Insert Occupational Description** link located below the free form text box.
2. When the window opens, select the **Detailed Description** radio button.
3. Select the **Submit** button. The window will close.
4. Select the **Save** button. When the **Please Confirm** windows appear, select the **OK** button for ALL notices that appear.
5. Select the **Next** button to proceed to the **Education** page.

Education: Page 5 of 8

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

Veteran: Page 6 of 8

1. Many of the questions on this page are already prepopulated for you. For example, the Spouse or Caregiver of a Military Member section is prepopulated for you.
2. For the Military Service section, most of the questions are prepopulated for you. For the **Are you a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit?** Select **No**.
3. In the Veteran Information section, select the answer to the question, **Have you served and were discharged from active duty as a member of National Guard or Reserve unit during an armed conflict and or crisis involving national security (Title 10 Activation) for which a campaign badge was authorized?** Select **No**.
4. Select the **Next** button.

Public Assistance: Page 7 of 8

1. Leave the Case Number blank and select the **Next** button.

Eligibility Summary: Page 8 of 8

If you completed the application as instructed, your applicant should indicate that he/she is eligible for the SNAP E&T program.

1. Select the **Assign Me** link. A window will open.
   i. Select the **Assign Me** link for the Capital SNAP E&T group.

2. Select the **Finish** button. A confirmation window will open.
3. Select the **Return to Programs Tab** link. The SNAP E&T Application should now appear as Complete.

Exercise #8: HHSC Information Ribbon

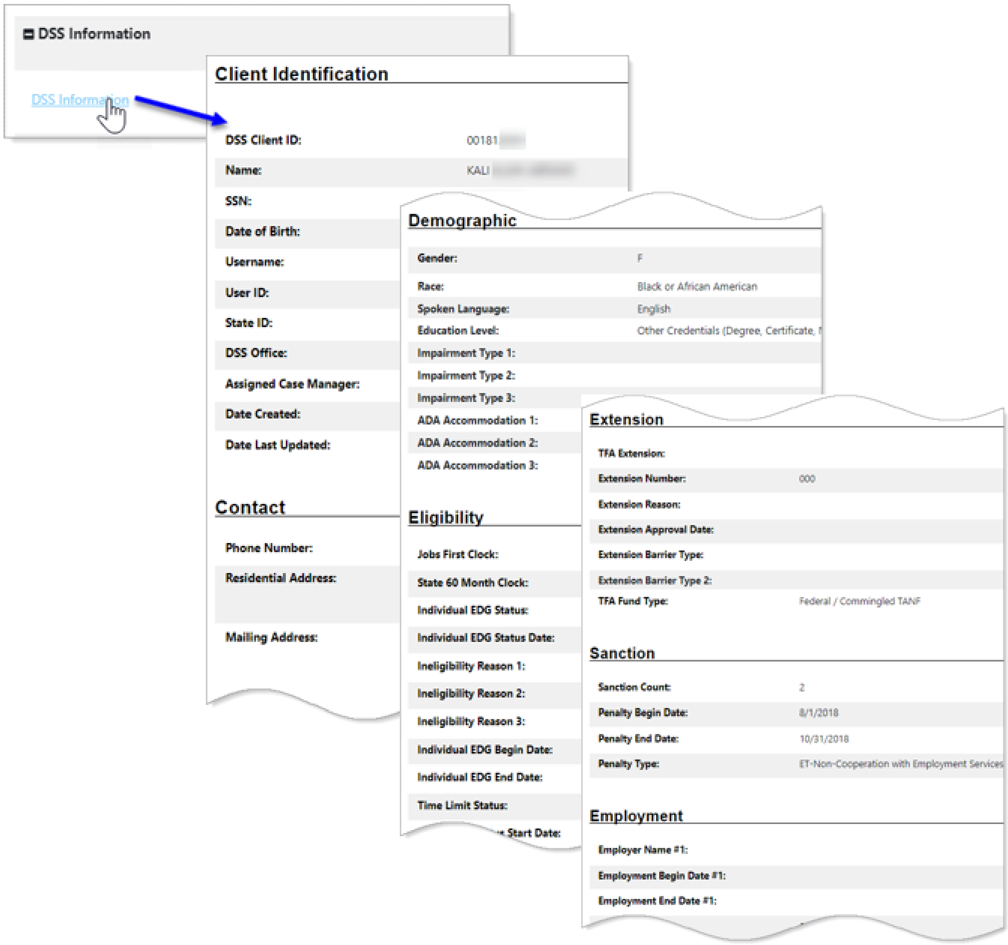
Objective: Review the HHSC contents for SNAP E&T.

Assumption: You have the SNAP E&T 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. Select the **plus sign icon** located below the SNAP E&T case number. The ribbons menu will expand to reveal all the SNAP E&T ribbons.
2. From the SNAP E&T ribbons menu select the **plus sign icon** next to **HHSC Information to open the** ribbon.
3. Select the **HHSC Information** link.



Accessing a Sample HHSC Information Form

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

Objective: Review the individual’s benefits information.

Assumption: You have the SNAP E&T 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 SNAP E&T Program application ribbon.
2. Click the **plus sign icon** to expand the Benefits Information ribbon to view the **Benefits Information Table.**

Note: There are no benefits information displayed in the training environment.

Exercise #10: Participation Ribbon and Initial Service Entry

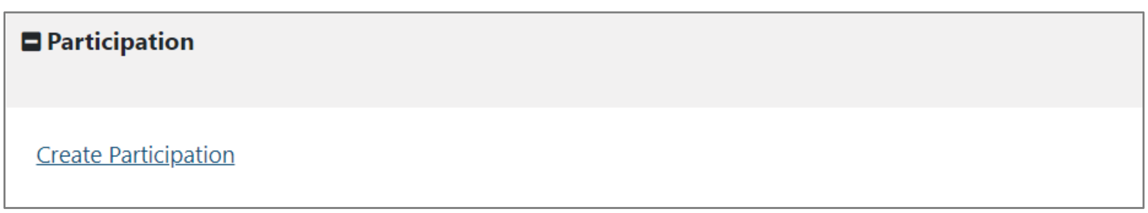
Objective: To create Participation Record.

Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

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

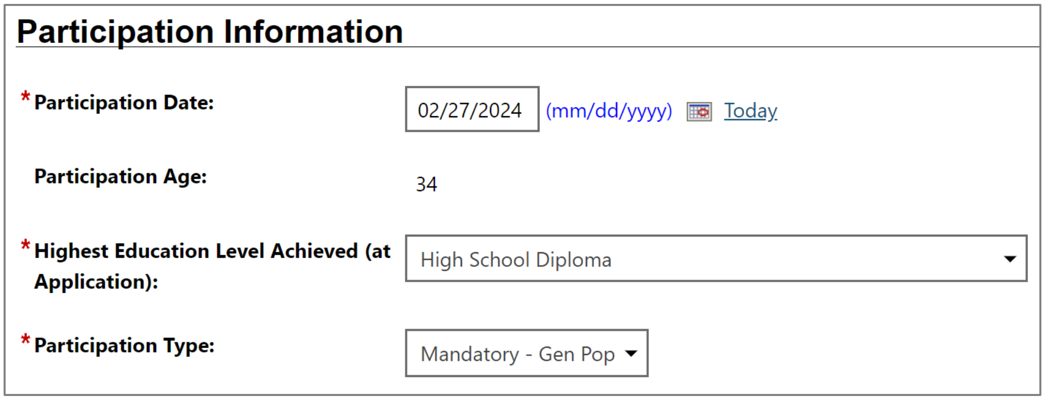
To create a participation record:

1. From the SNAP E&T ribbons menu, select the **plus sign icon** to expand the **Participation** ribbon.
2. Select the **Create Participation** link. The Participation page opens.



Participation Ribbon

3. For Participation Date, select the **Today** link.
4. Select **High School Diploma** for the Highest Education Level.
5. The Participation Type will prepopulate with **Mandatory – Gen Pop**.



Participation Information

6. Click the **Next** button to proceed to the next screen. The Activity Enrollment wizard opens to the General Information tab.
7. Under the Enrollment Information section, click the **Select Activity Code** link.
8. Select **153 – WF Services Orientation**.
9. The Actual Begin Date is prepopulated for you.
10. For Projected End Date, select the **Today** link.
11. Select the **Next** button. The Service Provider tab opens.
12. Click the **Select Service, Course or Contract** link to add a new Service.
13. Select **153 – Workforce Services Orientation**.
14. Select the **Next** button. The Closure Information tab opens.
15. Select the **Finish** button.

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 (see figure below).

PE	EE	Status	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
		O	153 - Workforce Services Orientation Sample Office Service Provider	W	SNAP Gen Pop	N/A	11/09/2023	11/09/2023	11/09/2023	Close

Page 1 of 1 Rows: 10

Activities/Enrollments/Services Ribbon with Existing Activities

Exercise #11: Work Readiness Assessment Ribbon

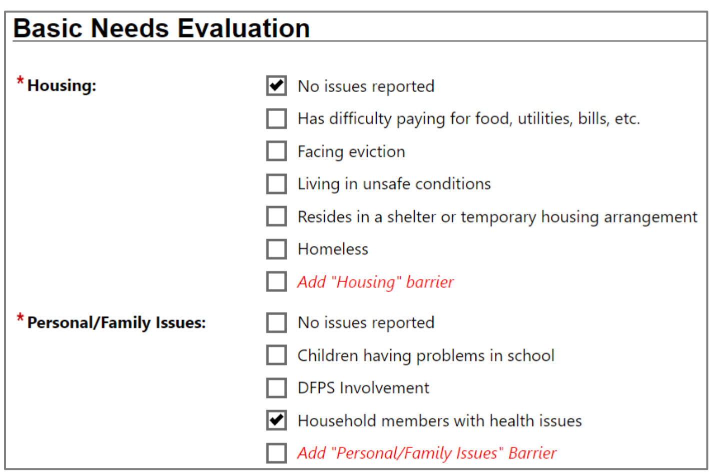
Objective: Record a work readiness assessment.

Assumption: You have the SNAP E&T 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 record a work readiness assessment:

1. Under the Work Readiness Assessment ribbon, select the **<u>Create Work Readiness Assessment</u>** link. The evaluations page displays (see figure below).



Basic Needs Evaluation

*Housing:	☑ No issues reported
	☐ Has difficulty paying for food, utilities, bills, etc.
	☐ Facing eviction
	☐ Living in unsafe conditions
	☐ Resides in a shelter or temporary housing arrangement
	☐ Homeless
	☐ *Add "Housing" barrier*
*Personal/Family Issues:	☐ No issues reported
	☐ Children having problems in school
	☐ DFPS Involvement
	☑ Household members with health issues
	☐ *Add "Personal/Family Issues" Barrier*

Work Readiness Evaluation Page

2. Select the applicable check boxes that assess the individual's basic needs, education factors, health factors, judicial system involvement, employability, and any other barriers that may

hinder the individual from attaining work. For our exercise, select **No issues reported** to all except:

- **Credential Training**: Select **Needs training, Skills are outdated, Needs credential to reach employment objective**. Also select the **Add Credential/Training Barrier** checkbox.
- **Employability**: Select **Sporadic or short-term episodes of employment**. Also select the **Add Work History Barrier** checkbox.

3. If applicable, enter other barriers that are not listed.
4. If applicable, enter additional comments.
5. Select the **Save** button. The Work Assessment table appears in the Work Readiness Assessment ribbon.

Work Readiness Assessment 1

Create Work Readiness Assessment

Search:

Create Date	Current Barriers	SNAP Status	Date Last Edited	Edited By	Action
8/30/2023	Language, Credential, Limited Work History		8/30/2023	Chris Cekan	Edit Delete Print View Barrier History

Work Readiness Assessment Table

Exercise #12: Individual Employment Plan (IEP)

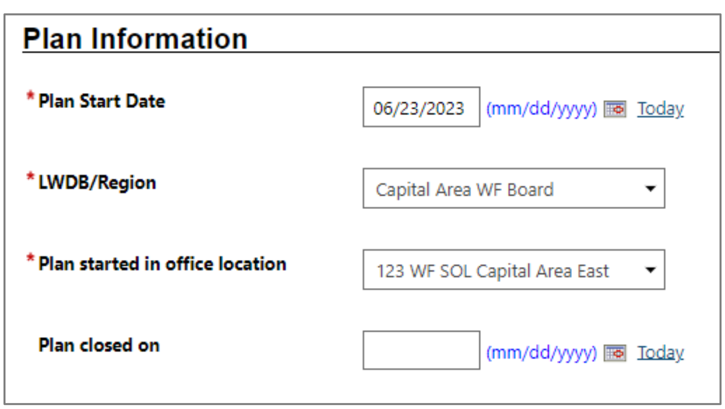
Objective: Create and manage IEP goals and objectives.

Assumption: You have the SNAP E&T 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 **<u>Plan</u>** 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 **<u>Today</u>** link for the **Plan Start Date**.



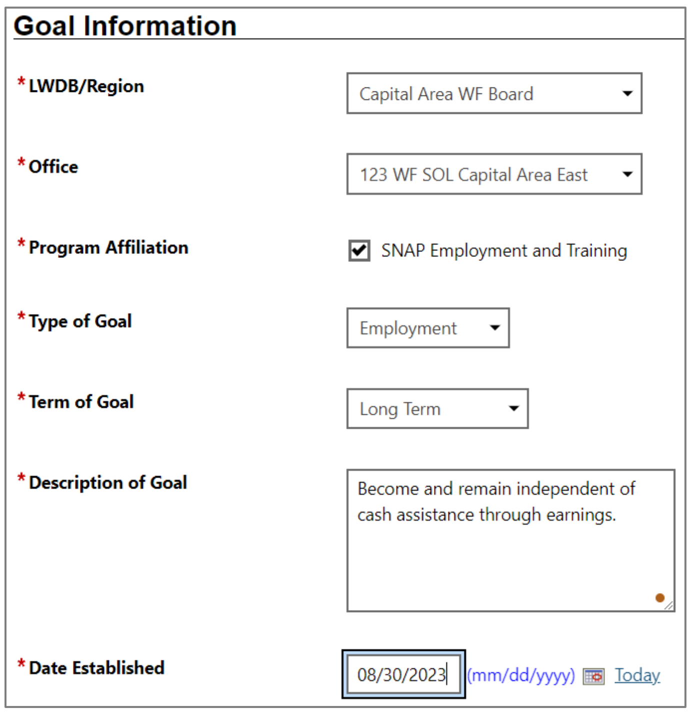
Plan Information Page

4. Confirm the LWDB/Region and Plan started in office location information.

5. 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 the **Add New Goal** link. The Add New Goal page displays (see figure below).



Create IEP – Add New Goal Page

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

3. For **Program Affiliation**, select the **SNAP Employment and Training** check box.

4. For Type of Goal, select **Employment**.

5. For Term of Goal, select **Long Term**.

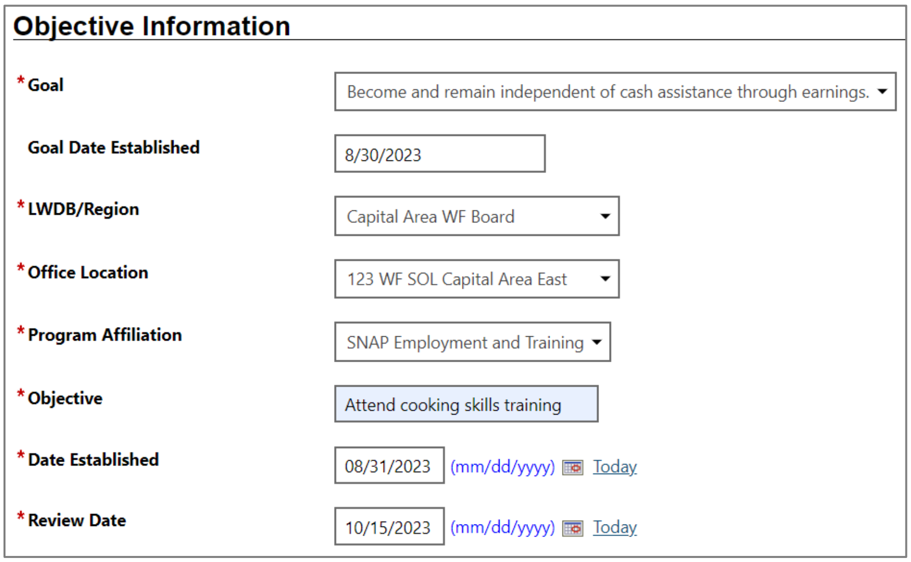
6. For a Description of the goal, enter, **Become, and remain independent of cash assistance through earnings.**
7. For Date Established, select the **Today** link.
8. Enter the Estimated Completion Date for the goal (make this up as appropriate for the scenario).

Note: Leave the Actual Completion Date blank until you are ready to close 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 will 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 **<u>Add new objective</u>** link to enter an objective for the individual manually.



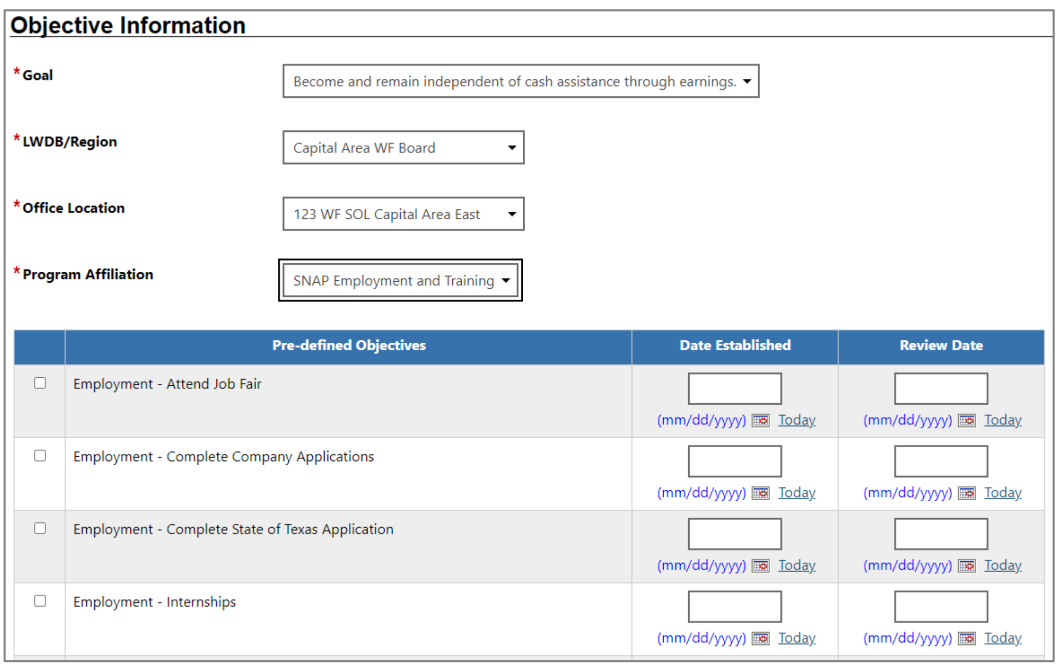
Create IEP – Add New Objective Page (Manual Entry)

2. Select the **Goal** to be associated with this objective: **Become and remain independent of cash assistance through earnings.**
3. Confirm the **LWDB/Region** and **Office Location**.
4. For Program Affiliation, select **SNAP E&T** from the drop-down menu.
5. For the Objective field, enter **Attend trainings.**
6. For **Date Established**, select the **<u>Today</u>** 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.

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

1. On the Objectives tab, click the **Select pre-defined objectives** link.
2. Select the Goal for the objective(s). There should only be one goal that we added earlier.
3. Select the LWDB/Region and Office Location if it’s not populated already.
4. For Program Affiliation, select **SNAP Employment and Training**. The page will refresh with the list of pre-defined objectives for the program (see figure below).


Objective Information

*Goal: Become and remain independent of cash assistance through earnings.

*LWDB/Region: Capital Area WF Board

*Office Location: 123 WF SOL Capital Area East

*Program Affiliation: SNAP Employment and Training

	Pre-defined Objectives	Date Established	Review Date
☐	Employment - Attend Job Fair	(mm/dd/yyyy) Today	(mm/dd/yyyy) Today
☐	Employment - Complete Company Applications	(mm/dd/yyyy) Today	(mm/dd/yyyy) Today
☐	Employment - Complete State of Texas Application	(mm/dd/yyyy) Today	(mm/dd/yyyy) Today
☐	Employment - Internships	(mm/dd/yyyy) Today	(mm/dd/yyyy) Today

Create IEP – Select Pre-Defined Objective Page

5. Click the checkbox in the left column for each objective to add to the individual's program goal. Select the checkbox for **Employment – Attend Job Fair**.

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 /(IEP) Service

Objective: Add service into the Activities / Enrollments / Services ribbon.

- **205 – Individual Employment Plan (IEP/EDP)**

Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

Purpose: This exercise is to record service activities for the Individual Employment Plan.

To add the 205 Individual Employment Plan service:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon** to expand their SNAP E&T Program application ribbon.
3. Click the **plus sign icon** to expand the Activities/Enrollments/Services ribbon.
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. The Customer Program Group section is automatically set to **50A – SNAP Gen Pop**. Select the **LWDB and Office** Location from the drop-down lists.

2. Under the Enrollment Section, click the **Select Activity Code** link to open an activity list, and then select **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. Optionally, you may perform any of the following steps to complete this section:

   i. To assign this applicant to an authorized SNAP 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 SNAP 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.

7. 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 select **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 ribbon.
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 Create an Objective Assessment Summary (OAS) Form

Objective: Perform data entry to identify the customer's programmatic needs.

Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

Purpose: To Complete the 203 Objective Assessment Summary Form.

Note: The State of Texas refers to this form as the Comprehensive Objective Assessment.

To create an Objective Assessment Summary (OAS):

1. From the Staff Profiles menu, select the **Plan** link.
2. On the **Plan** tab of the Objective Assessment Summary, click the **Create Objective Assessment Summary** button. The General page displays.
3. In the General Information section, select the **SNAP** program.
4. Select/maintain your LWIA and Office affiliation.
5. Select the **Today** link to enter the Assessment Create Date.
6. Attach Active Plan: Select **Yes**.

7. In the Staff section, enter **today's date** for the Date Completed.

8. Click **Next** to save your edits and continue to the Expectation page.

Expectations

Objective Assessment Wizard- Program Expectations Page

1. Indicate whether the individual seeks immediate employment, **Yes**.

2. Record desired services in the text box, **Education Assistance and Employment Assistance**.

3. Maintain as Occupation 1 **Cook, Cooks Fast Food**.

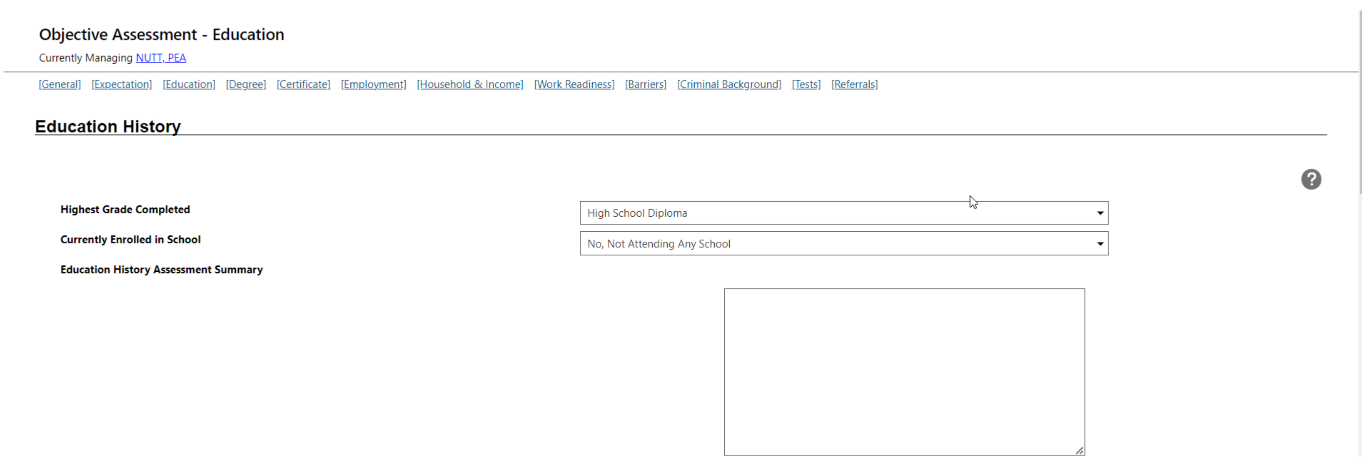
4. For Occupation 2 **Select Occupation** and **select Chefs and Head Cooks.**

5. Employment Type**- Regular.**

6. **Full Time-30 Hours or More.**

7. Shift Preference**- 1st.**
8. Desired Salary**-$14.50 hourly.**
9. Benefits**-Health Insurance, Paid Sick Leave, and Retirement/Pension.**
10. Desires Help in Career Planning**- Yes.**
11. Seeking Training Services**- Yes.**
12. Training Preference**-Occupational Skills training.**
13. Click **Next.**

Education

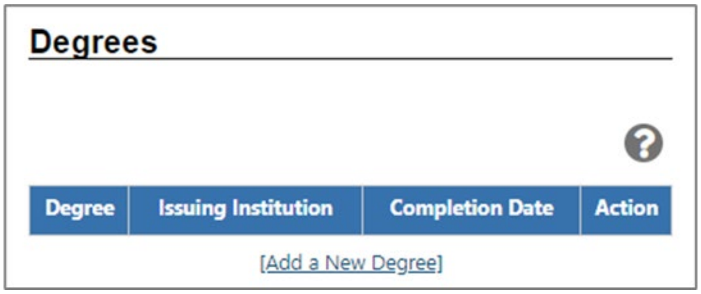


Objective Assessment Wizard-Education Page

1. Highest Grade Completed: **High School Diploma.**
2. Currently Enrolled in School**: No, Not Attending Any School.**
3. **Basic Skills / Education Factors:** Basic Skills Deficient-**Reading below 9th Grade.**

4. In Basic Skills / Education Factors Assessment Summary add: **Client requires culinary skills training to increase job opportunities and earnings**.
5. Click **Next** to save your edits and continue to the Degree page.

Degree



Objective Assessment Wizard – Education Page Degrees

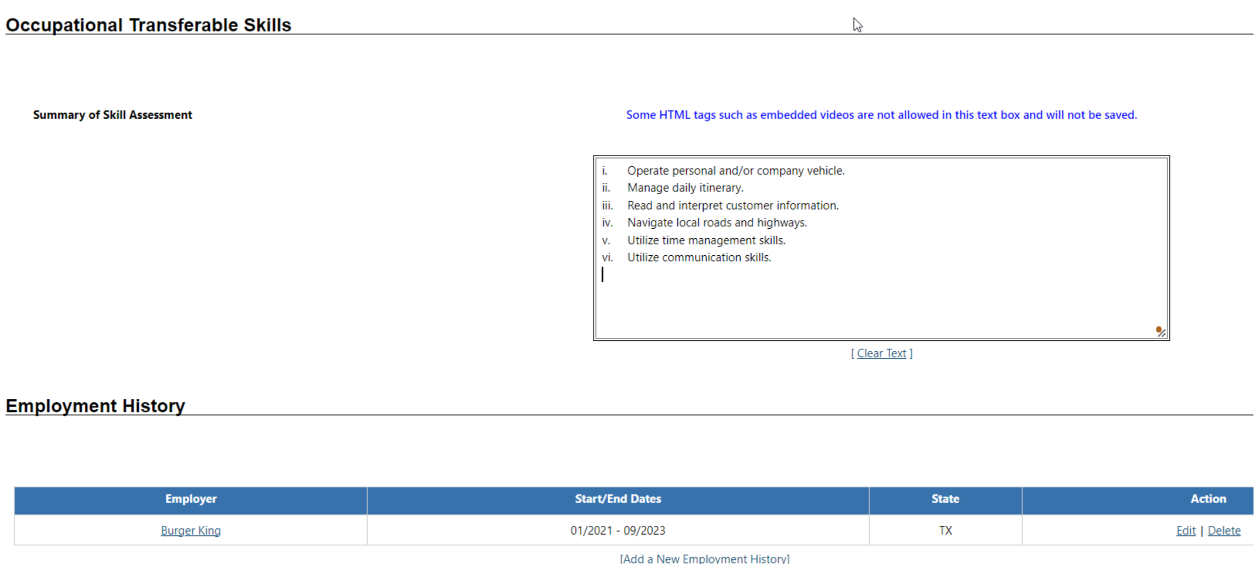
1. Click **Next** to continue to the Certificate page.

Certificates

Objective Assessment Wizard – Education Page

1. Click **Next** to continue to the Employment Page.

Employment



Occupational Transferable Skills

Summary of Skill Assessment

Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

i. Operate personal and/or company vehicle.
ii. Manage daily itinerary.
iii. Read and interpret customer information.
iv. Navigate local roads and highways.
v. Utilize time management skills.
vi. Utilize communication skills.

[Clear Text]

Employment History

Employer	Start/End Dates	State	Action
Burger King	01/2021 - 09/2023	TX	Edit | Delete

[Add a New Employment History]

Objective Assessment Wizard-Employment Page

1. In the Occupation Transferrable Skills section, in the **Summary of Skill Assessment** box, enter the following:

   i. Operate personal and/or company vehicle.

   ii. Manage daily itinerary.

   iii. Read and interpret customer information.

   iv. Navigate local roads and highways.

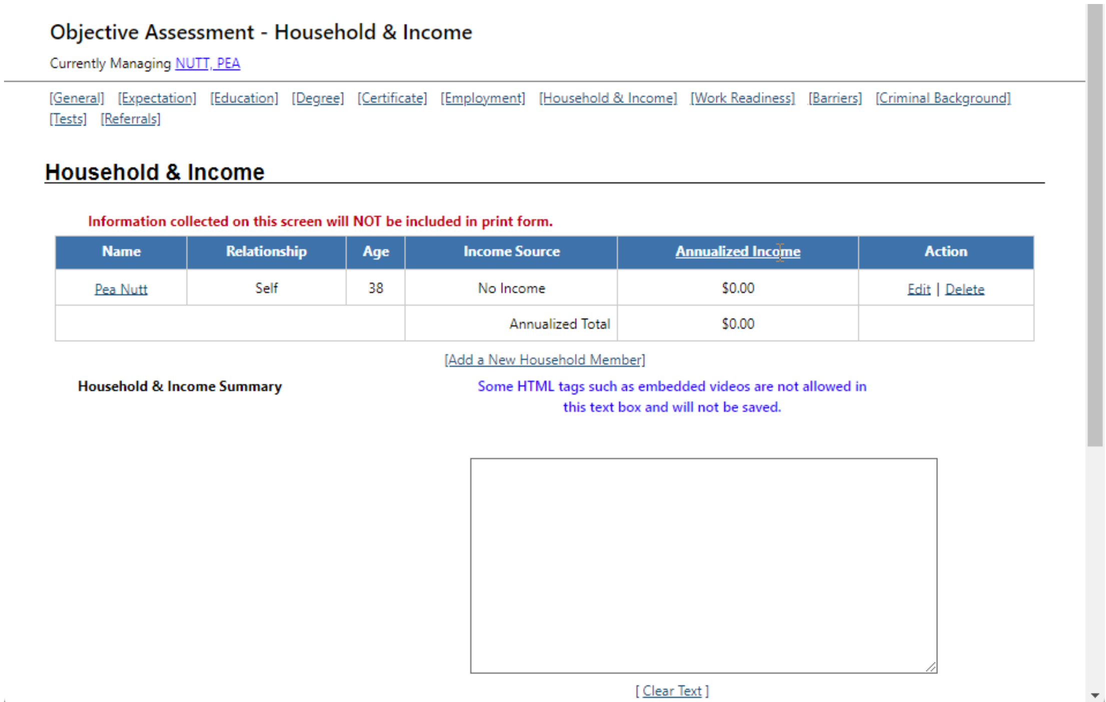
   v. Utilize time management skills.

   vi. Utilize communication skills.

2. In the Employment History section maintain the employer record for Burger King.

3. Click **Next** to save your edits and continue to the Household & Income page (see figure below).

Household & Income



Objective Assessment Wizard – Household & Income Page

1. Select the **Add a New Household Member** link.
2. Enter/select the following information:
    i. Enter the first and last name for the SNAP participant.
    ii. Enter **38** for the person's age.
    iii. Select **Self** from the Relationship field.
    iv. Select **No** for Dependent.
    v. Select **Individual** for Custody.
    vi. Select **No Income** for Income Source.
    vii. Enter **$0.00** for Income Amount.
    viii. Select **Save**.

3. To add a new household member and their income, click the **Add a New Household Member** link.

4. Enter/select the following information:

    i. Make up a first and last name.

    ii. Enter **61** for the person’s age.

    iii. Select **Parent** from the Relationship field.

    iv. Select **No** for Dependent.

    v. Select **Head of Household** for Custody.

    vi. Select **Employment** for Income Source.

    vii. Enter **$23,000.00** for Income Amount.

    viii. Select **Annually** for Frequency.

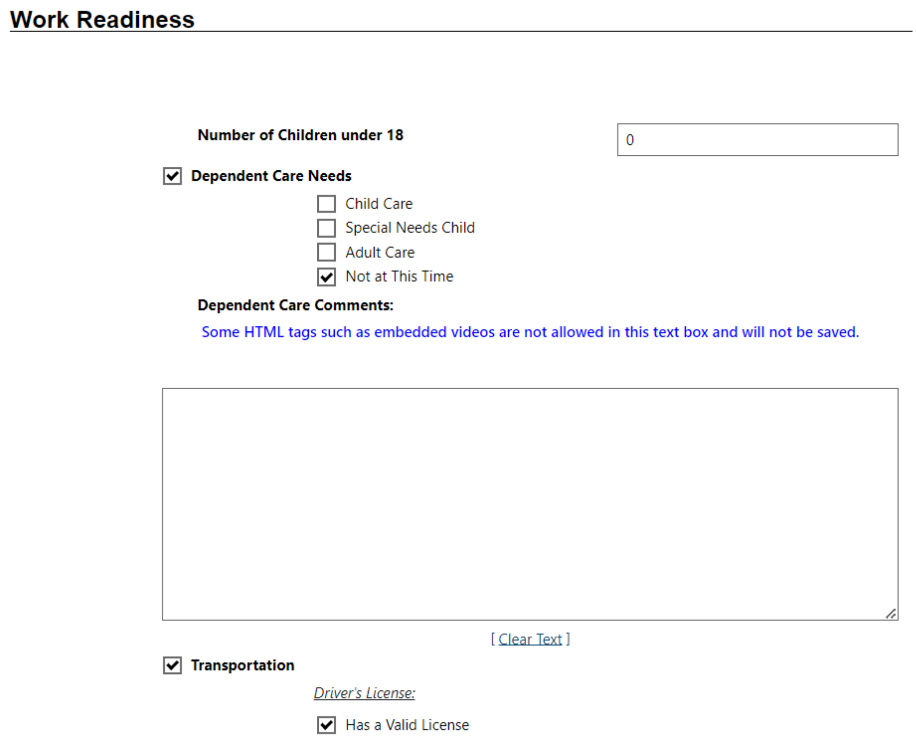
    ix. Enter **$23,000.00** for Annual Amount.

    x. Select **Save**.

5. In the Household & Income Summary text box, enter **Family qualifies as low income.**

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

Work Readiness



Work Readiness

Number of Children under 18 0

☑ **Dependent Care Needs**

☐ Child Care
☐ Special Needs Child
☐ Adult Care
☑ Not at This Time

Dependent Care Comments:

Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

[Clear Text]

☑ **Transportation**

Driver's License:

☑ Has a Valid License

Objective Assessment Wizard – Work Readiness Page

1. In the Work Readiness section, select the following checkboxes:
   Dependent Care Needs: **Not at this time**.

2. Transportation: **Has a Valid License, Private Vehicle Class, Lacks Automobile Insurance, Cannot Afford Gasoline**.

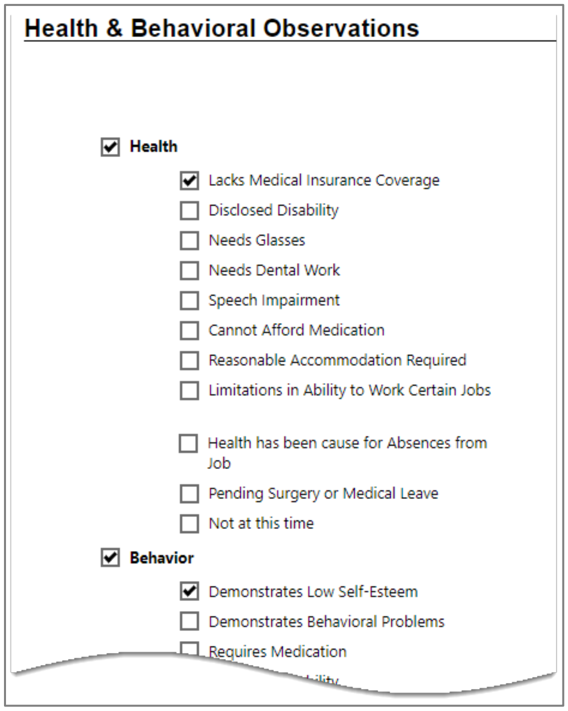
3. Contacts: **Telephone in Home.**

4. In the Work Readiness Summary box, enter **Client cannot perform delivery driver activities unless the vehicle required is company-provided**.

5. In the Workplace Behavior section, select the following check boxes: Interviewing Skills**-Negative Attitude**, Resume**-Does not have a Resume,** Application Completion**-Difficulty Summarizing Skills/ Work History, Needs to Learn how to use Labor Market Information.**

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

Barriers



Objective Assessment Wizard – Barriers Page

1. In the Health & Behavioral Observations section, select the following checkboxes:
   Health-**Lacks Medical Insurance Coverage**.
   Behavior- **Demonstrates Low Self Esteem**.

2. In the Health & Behavior Observations Assessment Summary box, enter the following:
   Client does not have personal medical insurance and Client has difficulty making a positive, strong first impression.

3. In the Living Environment section, select the following check boxes**: Home Life- Lacks Family Support System.**

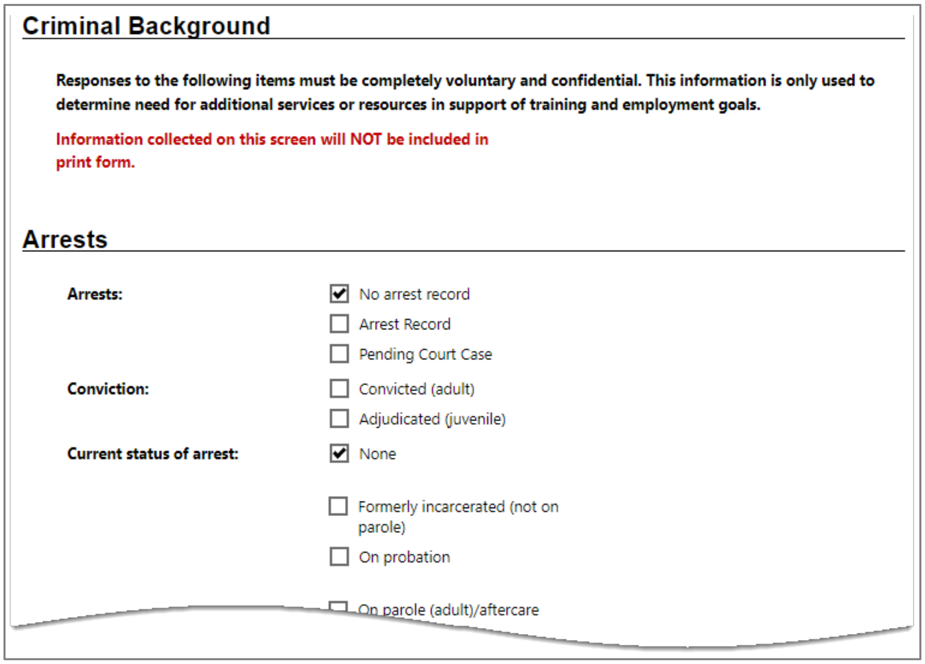
4. In the Economic Factors / Financial Situation section, select the following check boxes:
   Credit/Financial **Needs Money-Management Services**.

5. In the Barriers to Employment section, select the following check boxes: **Lacks Significant Work History, Sporadic or Limited Work History, Restricted Commuting Distance.**

6. In the Access Assessment section, in the Employment Barriers Assessment Summary box, enter **Client exhibits poor reading comprehension skills.**

7. Click **Next** to save your edits and continue to the Criminal Background page.

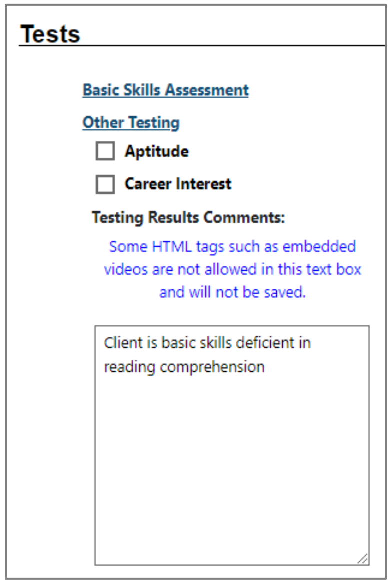
Criminal Background



Objective Assessment Wizard – Criminal Background Page

1. In the Criminal Background section, select the following check boxes: **Arrest- No arrest Record**, **Current Status of Arrest- None.**
2. Click **Next** to save your edits and continue to the Tests page.

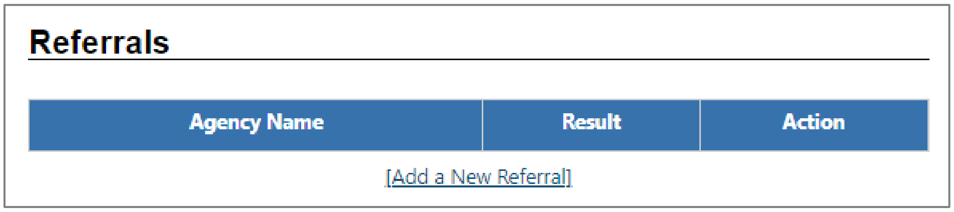
Tests



Objective Assessment Wizard – Tests Page and Assessments Tab

1. Click the **Basic Skills Assessment** link to view the client's assessment results (if recorded).
2. Click **Close the Window**.
3. In the Testing Results Comments: box, enter **Client is basic skills deficient in reading comprehension.**
4. Click **Next** to save your edits and continue to the Referrals page.

Referrals



Objective Assessment Wizard – Referrals Page

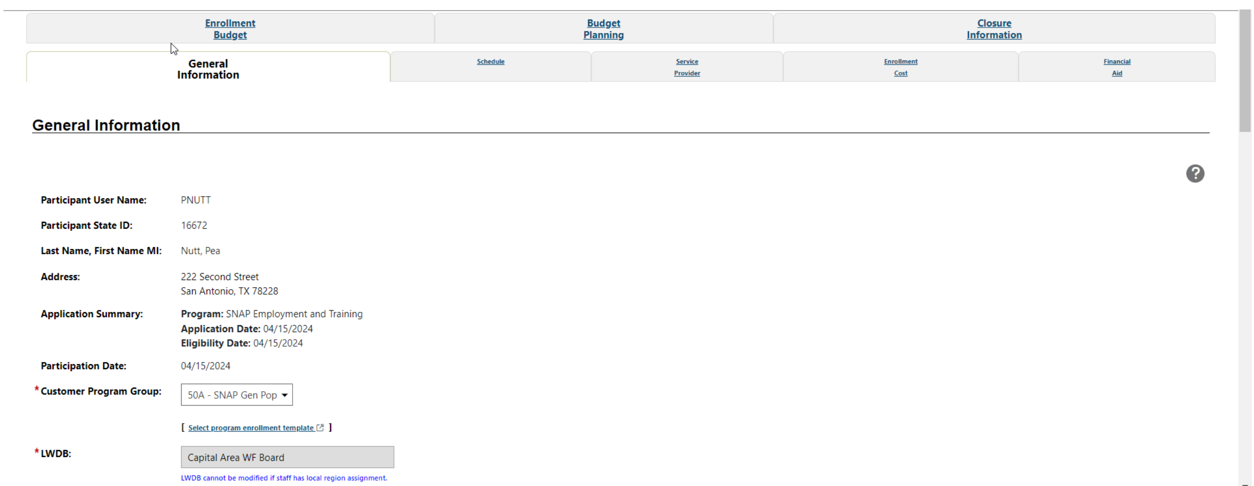
1. Click **Finish** to complete the OAS. The updated Plan tab redisplays.

Exercise #15: Activities / Enrollments / (203) Service

Objective: To add service 203 Comprehensive Objective Assessment.

To add the 203 Comprehensive Objective Assessment service:

1. From the Activities/Enrollments/Services ribbon, select the **Create Activity/Enrollment/Service** link. The Activity Enrollment wizard displays the **General Information** tab.



Activity Enrollment Wizard - General Information Tab

2. The Customer Program Group section is automatically set to **50A – SNAP Gen Pop**. The **LWDB and Office Location** are prepopulated.

3. Under the **Enrollment Information** section, click the **Select Activity Code** link to open an activity list, and select **203 – Comprehensive Objective Assessment.**
4. WIT requires an actual begin date or a projected begin date.

- For **Actual Begin Date,** select the **Today** link. (Note: Actual Begin Date cannot be a future date.)
- Enter the Projected End Date. For purposes of training, select the **Today** link.

5. In the Staff Information section, confirm or select your **Position**, if applicable.
6. Select the **Next** button. The Service Provider Tab opens.

Provider Tab

1. Verify Provider information.
2. Click the **Select Service, Course or Contract** link to open an activity list, and then select **203 Comprehensive Objective Assessment.**
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**.

Exercise #16: Activities / Enrollments / (262) Service

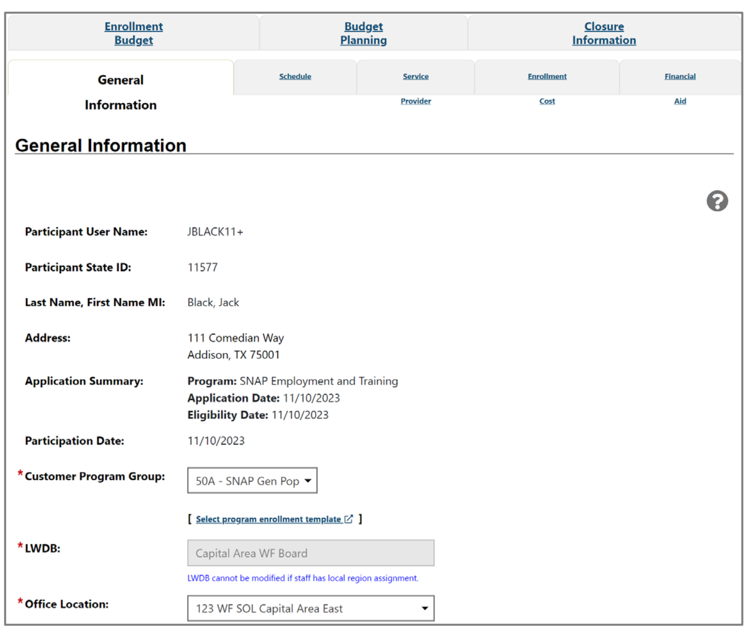
Objective: To add service 262 Job-Readiness / Employment Skills:

Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

Purpose: This exercise is to record service activities for the job readiness/employment skills service.

To add the 262 - Job Readiness/Employment Skills service:

1. From the Activities/Enrollments/Services ribbon, select the **Create Activity/Enrollment/Service** link. The Activity Enrollment wizard displays the **General Information** tab.



Activity Enrollment Wizard - General Information Tab

2. The Customer Program Group section is automatically set to **50A – SNAP Gen Pop**. The **LWDB and Office Location** are prepopulated already.

3. Under the **Enrollment Information** section, click the <u>**Select Activity Code**</u> link to open an activity list, and select **262 - Job Readiness/Employment Skills**.

4. WIT requires an actual begin date or a projected begin date.

   - For **Actual Begin Date,** select the <u>**Today**</u> link. (Note: Actual Begin Date cannot be a future date.)

   - Enter the Projected End Date. For purposes of training, select the <u>**Today**</u> link.

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

6. Select the **Next** button. The Schedule tab opens.

7. In the Enrollment Schedule Countable Activity section, enter the following information into the Scheduled column:

   i. For **Monday**, enter 9:00AM as the start time and 10:00 as the end time.

   ii. For **Wednesday**, enter 9:00AM as the start time and 10:00 as the end time.

   iii. For **Friday**, enter 9:00AM as the start time and 10:00 as the end time.

Day of the week	Scheduled		Supplemental		Total Hours
Sunday					00:00
Monday	9:00 AM	10:00 AM			01:00
Tuesday					00:00
Wednesday	9:00 AM	10:00 AM			01:00
Thursday					00:00
Friday	9:00 AM	10:00 AM			01:00
Saturday					00:00
Total Scheduled Hours					**03:00**

Enrollment Schedule Countable Activity Table

8. Select the **Next** button. The Service Provider tab opens.
9. Click the **Select Service, Course or Contract** link. A window opens displaying a list of services you can choose from.
10. Select the **262 - Job Readiness/Employment Skills** option.
11. Select the **Next** button. The Closure Information tab opens.
12. Select the **Finish** button.

Exercise #17: Attendance Ribbon

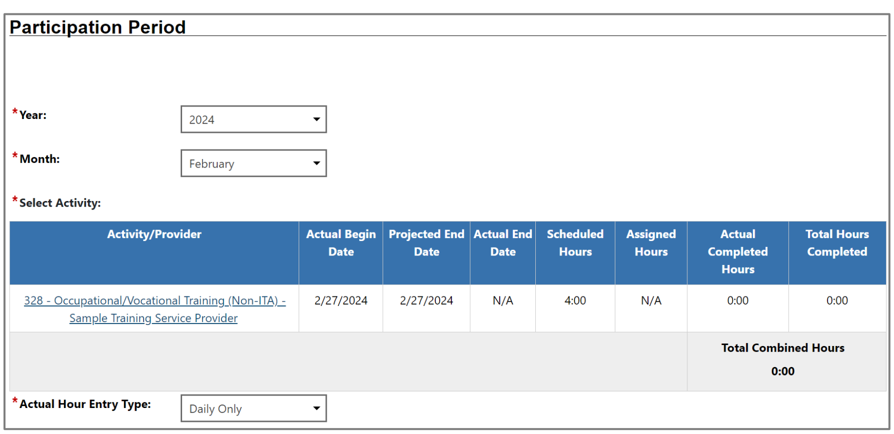
Objective: Perform data entry to record attendance for a SNAP E&T service.

Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice documenting the client's attendance.

To track attendance hours for a countable activity:

1. From the Attendance ribbon, select the **Attendance Tracker** link.
2. Select the **Year** and **Month** of the activity you want to document from the drop-down lists or use the default current month and year. A table displays, listing all countable activities the individual was enrolled in within that time frame (see figure below).



Participation Period

*Year: 2024

*Month: February

*Select Activity:

Activity/Provider	Actual Begin Date	Projected End Date	Actual End Date	Scheduled Hours	Assigned Hours	Actual Completed Hours	Total Hours Completed
328 - Occupational/Vocational Training (Non-ITA) - Sample Training Service Provider	2/27/2024	2/27/2024	N/A	4:00	N/A	0:00	0:00
						Total Combined Hours 0:00	

*Actual Hour Entry Type: Daily Only

List of Services with Countable Hours for Selected Month and Year

3. The WorkinTexas site only has one option as an Actual Hour Entry Type, Daily. This opens the Daily ACH fields in the Daily ACH (Actual Completed Hours) column for editing.
4. Select the link for the desired **Activity/Provider**. A calendar entry grid for tracking hours for the selected month/year will display below the activity list, and the selected activity is bolded.
5. Entry boxes are enabled when the activity dates fall within the year and month selected above and scheduled hours have been previously set up on the Schedule tab of the enrollment wizard.
6. Enter the attendance hours in the format hh:mm (00:00).
7. 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 to the right, and for the month at the bottom.
8. 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. (To get back to the previous screen, select the back button on the browser)

Exercise #18: Good Cause Ribbon

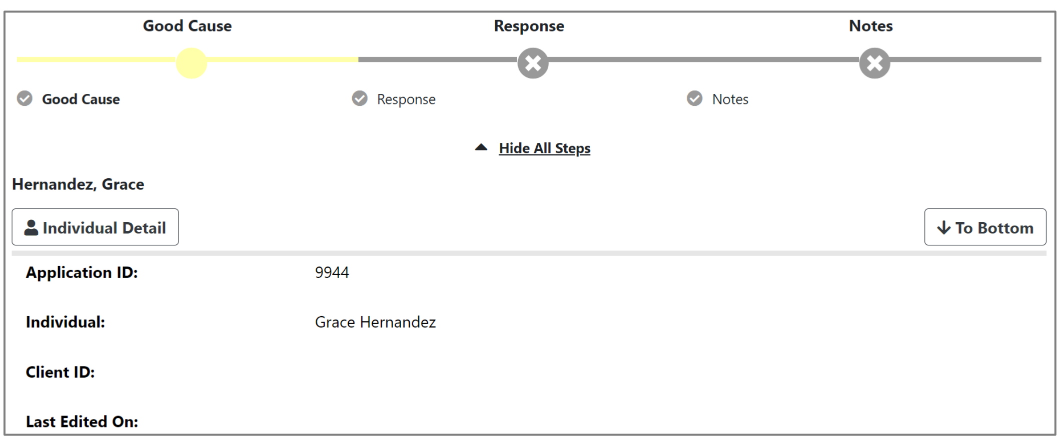
Objective: Record the good cause (reconsideration) to excuse the individual from SNAP E&T Program requirements.

Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice recording good cause for the individual to be temporarily excused from SNAP E&T program requirements.

To record a good cause entry:

1. Click the **<u>Create Good Cause</u>** hyperlink from the **Good Cause** ribbon. The Good Cause Wizard displays (see figure below).



Good Cause Wizard

2. Click the Action Type drop down menu and select **Reconsideration.** The Reconsideration Reason menu appears.

3. Select the Reconsideration Reason. For this exercise, select **Child < 16 or age 16 – 17 who attends school at least half time.**

4. To add the **Begin Date**, select the **Today** link.

5. Enter Comments as appropriate.

6. Select the **Next** button. The **Response** page appears.

Application ID:	9944
Individual:	Grace Hernandez

Response

Rejection Reason:	
HHSC Good Cause Response:	
Date of Response:	

Response Page

7. Select the **Next** button.

8. Add a new **Case Note** if applicable.

9. Select the **Finish** button. Select **Return to Programs Tab**.

Note: The Good Cause ribbon displays the reconsideration reason table with the newly entered information.

Exercise #19: Sanctions Ribbon

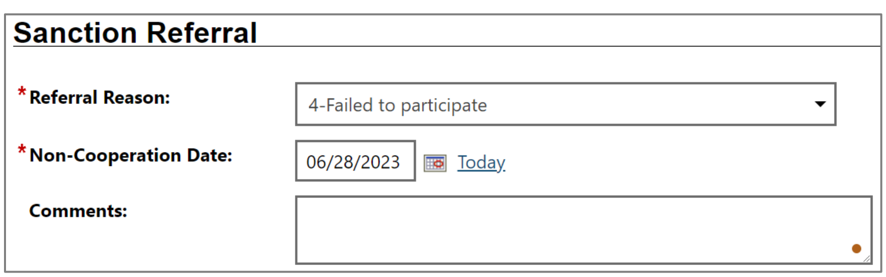
Objective: Review Sanction Processes for the SNAP E&T program.

Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice how to create a sanction referral in the WIT system.

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 SNAP Program application ribbon.
3. Click the **plus sign icon** to expand the Sanctions ribbon. Any existing sanctions will be displayed in a table.
4. Select the **Create Sanction Referral** link from the Sanctions ribbon. The sanctions page displays (see figure below).


Sanction Referral

*Referral Reason:	4-Failed to participate
*Non-Cooperation Date:	06/28/2023 Today
Comments:	

Sanctions Referral Section

5. Verify that the correct LWIA/Region and Office Location selections are accurate. If not, change them accordingly.
6. For Referral Reason, select **4-Failed to participate** from the drop-down menu.
7. For Non-Cooperation Date, select the **Today** link to add today's date.
8. Attach Case Note per policy.
9. Select the **Save** button. The sanctions table appears with the sanction information (see image below).

Sanctions 1

Create Sanction Referral

Search:

Create Date	Create Staff	Date Sent to HHSC	Referral Reason	Non-Cooperation Date	Referral Status	HHSC Response	HHSC Response Date	Adverse Action Date	HHSC Good Cause Reason	Rejection Reason	Day Counter	Action
06/28/2023	Cekan , Chris (30029)		Failed to participate	06/28/2023	Pending HHSC Response						0	Edit

Sanctions Table

Exercise #20: Add Employment Ribbon

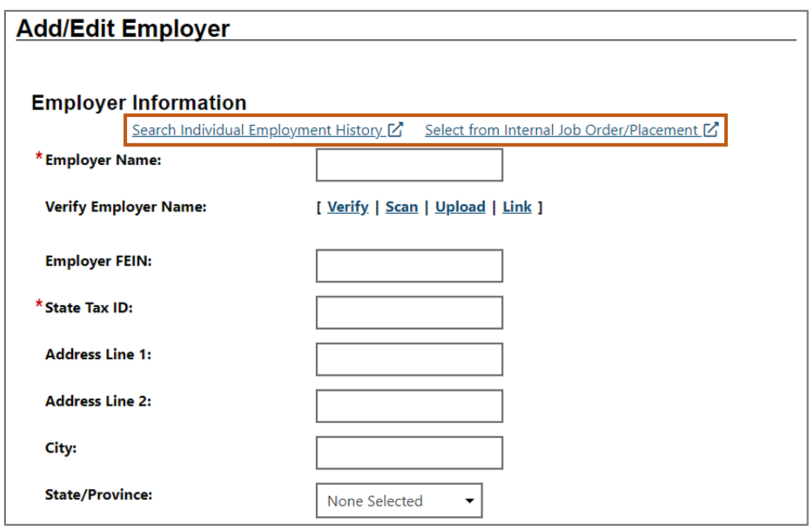
Objective: Document obtained employment.

Assumption: You have the SNAP E&T 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 (see figure below).



Add/Edit Employer Page

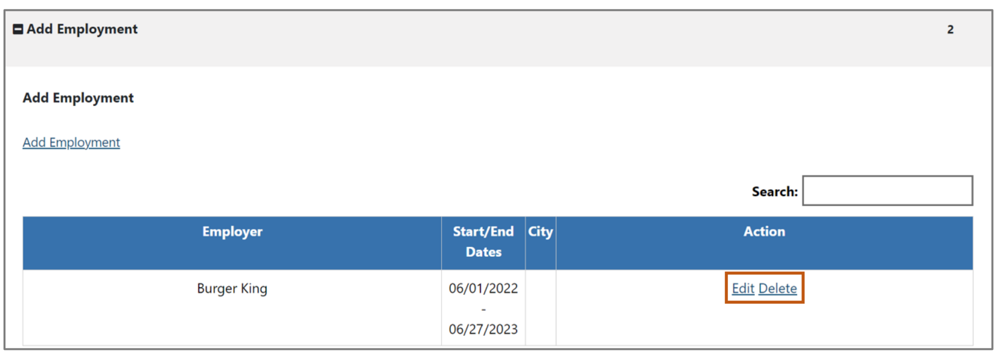
2. Enter the **Employer Information** and **Job Information**, taking note of the required fields marked with a red asterisk.

  - 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 **Steakhouse G** and select the first option on the list that appears. Various fields will prepopulate with the Steakhouse G information.
4. For State Tax ID, enter **22334444**.
5. For Job Title, enter **Chef**.
6. For Occupation, click the **Select Occupation** link.
7. In the Keyword Search field, enter **Chef**. A list will appear.
8. Select **Chefs and Head Cooks**.
9. For Is this a green job, select **No**.
10. For Salary Frequency, select **Year**.
11. For Salary Wage, enter **50,000.00**.
12. For Job Start Date, select **Today**.
13. For Job End Date, select the **Currently Employed** checkbox.
14. Select **Yes** for the following:
    - Primary Employer
    - Receiving Fringe Benefits
    - Receiving Health Care Benefits

- Job Covered by Unemployment

15. Select **No** for the following:
    - Is this Entrepreneurial and/or Self-Employment?
    - Is this a Registered Apprenticeship?
    - Is this active Military Service?
    - Is this considered Non-Traditional Employment?
16. For Is this considered Training Related Employment? Select **Yes**.
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).



Employer List Table

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.

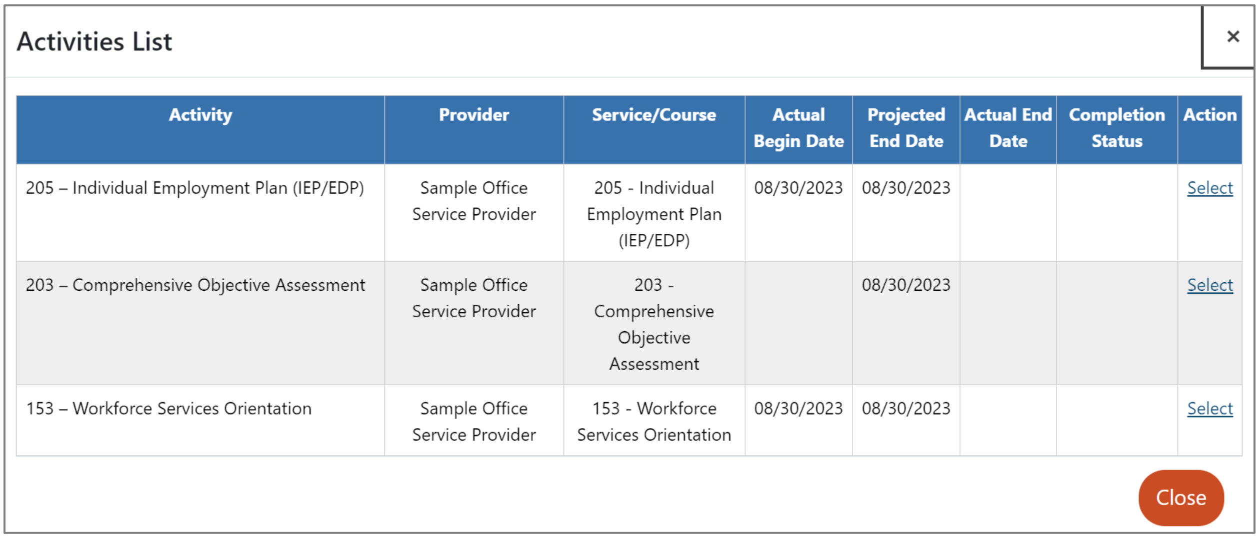
Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

Purpose: This exercise is to practice documenting credential attainment information.

To record a new credential:

1. Select the **Create Credential** link from the Credentials ribbon. The Track Credentials for SNAP E&T page displays.
2. In the **General Information** section, select Capital Area WF Board for the **LWIA/Region** and 123 WF SOL Capital Area East for the **Office** Location.
3. In the Credential Information section, for Credential Received, select **Occupational Certification**.
4. For Credential Verification, select the **Verify** link to identify the document being used for Credential Verification and select **Copy of Degree or Certificate**. Click the **Verify** link again to hide 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 (see figure below).


Activities List ×

Activity	Provider	Service/Course	Actual Begin Date	Projected End Date	Actual End Date	Completion Status	Action
205 – Individual Employment Plan (IEP/EDP)	Sample Office Service Provider	205 - Individual Employment Plan (IEP/EDP)	08/30/2023	08/30/2023			Select
203 – Comprehensive Objective Assessment	Sample Office Service Provider	203 - Comprehensive Objective Assessment		08/30/2023			Select
153 – Workforce Services Orientation	Sample Office Service Provider	153 - Workforce Services Orientation	08/30/2023	08/30/2023			Select

Close

Credential Activities List

7. Click the **Select** link in the **Action** column for **205-Individual Employment Plan (IEP/EDP)**.
8. Click the **Save** button. The Programs tab redisplays, with the credential listed in the Credentials ribbon.

Exercise #22: Case Transfer Ribbon

Objective: Create a case transfer request.

Assumption: You have the SNAP E&T 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 SNAP E&T program moves to a different service delivery region.

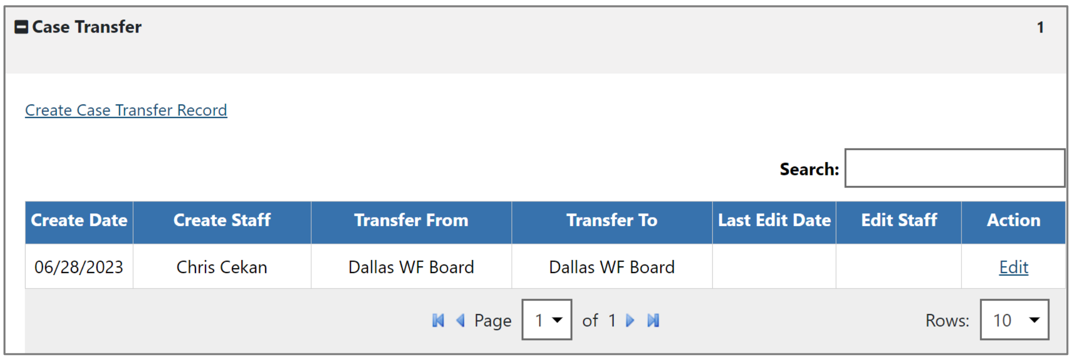
To create a case transfer request:

1. Click the **plus sign icon** to expand the **Case Transfer** ribbon.
2. Select the **<u>Create Case Transfer Record</u>** link from the **Case Transfer** ribbon. The **Case Transfer** page displays.
3. For LWDB/Region Transfer Request being made to drop-down menu, select **North Central WF Board**.
4. For LWDB Office Transfer Request select **931 WF SOL NCT Terrell** from the drop-down menu.
5. In the Staff to be notified of Transfer Request drop-down menu, select **Staff One.**
6. 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.

7. Enter additional comments into the comments field as necessary.

8. Select 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 ribbon.



Case Transfer 1

Create Case Transfer Record

Search:

Create Date	Create Staff	Transfer From	Transfer To	Last Edit Date	Edit Staff	Action
06/28/2023	Chris Cekan	Dallas WF Board	Dallas WF Board			Edit

Page 1 of 1 Rows: 10

Case Transfer Table Displaying Transfer Record

Exercise #23 Closure Ribbon

Objective: Close all services and create closure form.

Assumption: You have the SNAP E&T 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. Open the Activities / Enrollments / Services ribbon. The Activity / Enrollments / Services table displays all the services.
2. The first step is to close out all open services from the Activities/Enrollments/Services ribbon. Open activities have an **O** icon in the **Status** column.
3. 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.
4. To enter the Last Activity Date (mm/dd/yyyy), select **<u>Today</u>**.
5. For Completion Code, select **Successful Completion**.
6. Click the **Finish** button. The Programs tab redisplays with the activity status closed (The **Status** icon for the activity should now be orange) in the Activities/Enrollments/Services ribbon

of the SNAP E&T program. The Actual End Date Column will also display the close date along with the Completion Code.

7. 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.**

Open Activities Error Message

Closing IEP Objectives and Goals

Next, we also need to close the IEP Goals and Objectives.

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 **Edit** link under the **Action** column.
12. In the Goal Information section, enter the **Actual Completion Date** by selecting the **Today** 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. Select the **Add Employer** link. The Add/Edit Employer window opens.
5. On the Add/Edit employer screen, select Search Individual Employment History. Select the entry for **Steakhouse G** that was created earlier.
6. Validate all existing data is correct and select the **Save** button.
7. 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 SNAP E&T 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 SNAP E&T Case Closure form.

Exercise #24: Exit / Outcome Ribbon

Objective: Manually exit the customer.

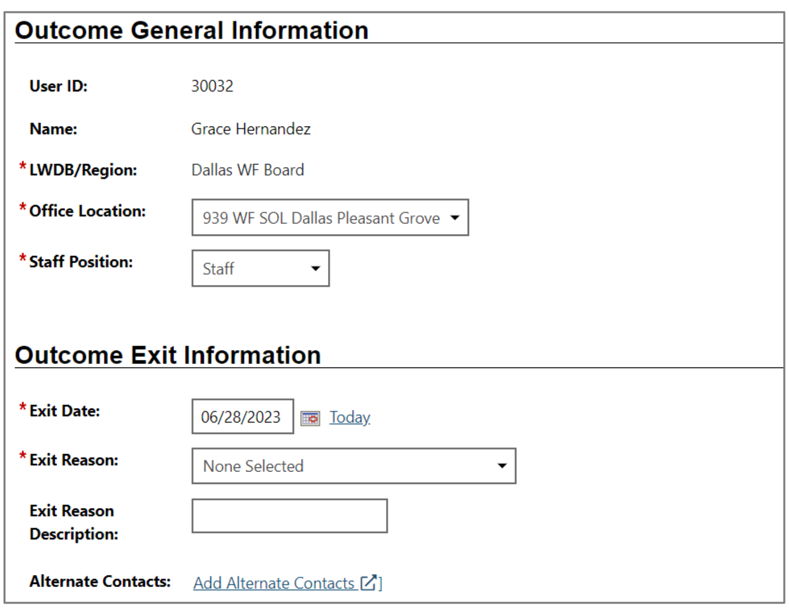
Assumption: You have the SNAP E&T customer's account and Programs tab already open in WIT.

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 **Today**.
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 close all other programs for which the customer is co-enrolled. This includes TAA, Wagner-Peyser, SNAP E&T, WIOA, and/or Choices.