

WorkinTexas.com SNAP E&T Case Management Training Guide

Approved by the

Texas Workforce Commission

Training and Development Department



Training and Development Mission

We are here to help TWC and our partners enhance employee workplace skills and productivity through the development, coordination, and delivery of quality learning opportunities.

Texas Workforce Commission

Training and Development Department

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SNAP E&T Program: Case Management Training

Course Objectives

After completing this course, you will be able to:

- Apply terms, business concepts and program features to navigate correctly and efficiently the WorkinTexas.com (WIT) website.
- Perform system registration on behalf of program applicants.
- Search for and assist system-registered individuals.
- Perform data entry to determine program eligibility on behalf of SNAP E&T program applicants.
- Provide program services to SNAP E&T program participants.
- Perform data entry to document the programmatic needs and achievements of program participants.
- Perform ancillary staff responsibilities as needed, e.g., manage case notes, communications, and assessments on behalf of program participants.

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.

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.

Glossary of Terms

Throughout the SNAP case management training you will receive, we will reference the following terms:

- **Individual or Job Seeker** – Terms used interchangeably to describe a person who receives program services.
- **Applicant** – An Individual for whom program eligibility determination has yet to be determined.
- **Participant** – A program applicant who is actively receiving program services.
- **Staff** – Synonymous with case manager or workforce agency employee, a program expert who manages service delivery for program participants.
- **Assist** – Following system registration, staff can access a customer's profile by selecting **Manage Individuals > Assist an Individual** to manage the customer's information.
- **Currently Managing** – The section located within staff's left navigation menu that displays the name of the individual (or employer) whose account the staff user is currently managing.

- **Left Navigation Menu** – The list of staff user options staff access by selecting the **Menu** hyperlink at the top left center portion of the WIT screen.
- **Release Individual** – A hyperlink command displayed in the Currently Managing section that when selected, enables staff to stop assisting the current individual (or employer).
- **Ribbons** – The panels or containers displayed on the Programs tab screen for each program that maintain specific program details such as program services.
- **Widgets** – Quick links to specific information that are commonly used and easily accessed from the Staff dashboard. The job seeker and employer dashboards also have corresponding widgets. Widgets can be configured and customized by the staff member, job seeker or employer.
- **Wizard** – A step-by-step guide for completing a process in WIT, such as a program application form to determine program eligibility.
- **Dashboard** – Primarily used as the landing page, or the first page displayed upon Log In. The dashboard is a quick way for staff members to view common items and information through widgets.
- **Enrollments** – A term synonymous with program activities or services provided to a program participant.
- **Registration** – A term with dual meaning. System Registration is how an individual (or staff user on their

behalf) create an account profile, while Program Registration refers to completion of the program application form.

- **Soft Exit** – The process by which the system automatically closes a participant’s active service delivery for a single program (Wagner Peyser, WIOA, or Trade) due to non-service for 90 consecutive days.
- **Combined Soft Exit** – The process by which the system automatically closes a participant’s active service delivery in two or more programs (Wagner Peyser, WIOA, and/or Trade), due to non-service for 90 consecutive days for each program affected.
- **Hard Exit** – The process by which staff manually creates a program outcome for the individual. This usually occurs if the individual satisfies a global exclusion reason (i.e., the individual is deceased).
- **Case Closure** – An interim step/process to officially stop the delivery of planned program services until the soft (or hard) exit process occurs.
- **Authorized Staff** – Staff users whose privileges enable them to perform specific functions in the system.
- **Co-enrollment** – This term is applied when an individual is enrolled in two or more federal programs simultaneously. In this context, the combined soft exit procedure will apply to individuals co-enrolled in the WP, WIOA, and/or Trade programs.

- **Case Assignment** – The process by which an individual is assigned to a specific case manager or a group of case managers for the purpose of receiving specialized assistance.
- **Formula Eligibility Determination** – The automated process by which the system determines applicant eligibility for program services based solely on the data entry performed and the business rules that govern eligibility determination.
- **Business Rule** – In software development, a **logic qualifier** usually in the form of an **If-Then** clause that enforces local, state, and federal regulatory requirements.
- **Document Management** – The process by which staff obtain client documents electronically and add them to the client’s account profile.
- **Remote Signature** – The ability to affix required signatures digitally on various program forms on behalf of staff, the individual, and others as needed.
- **Case Note** – Staff-entered documentation that provides a fact-based description of an individual’s interaction with the Work in Texas system.

About the SNAP E&T Program

The SNAP Employment and Training Program module provides support for mandatory appointment setting, as well as program application and participation records, and gathering of application information for SNAP E&T. The SNAP E&T module helps staff guide the participant through the entire process, providing all the necessary case management tools to manage an individual's case progress, from application to closure.

Getting Started: Staff Login

To manage service delivery to individuals through the SNAP E&T program, staff must first log in to the WIT system.

Note: Staff users do not create their own accounts. The System Administrator creates and manages staff accounts, staff logins, staff privileges, and Workforce Area assignments.

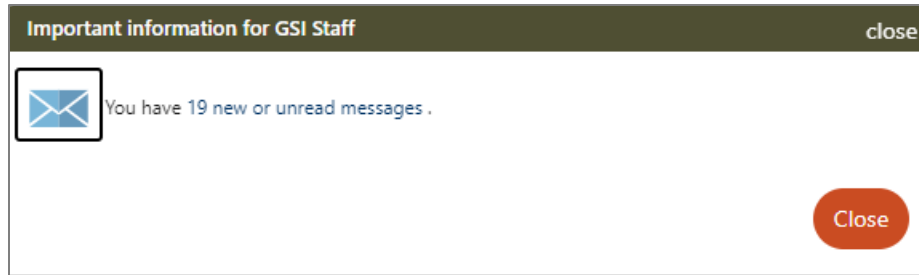
The production environment uses a **single sign-on** approach which enables you to use the same login credentials for other Workforce applications. The staff training login is generic and applies to the training environment only.

To log in as a staff user type, follow these steps:

1. Access the Home page according to the trainer's directions.
2. Click Sign In / Register.
3. Enter your assigned Username.
4. Enter the password provided by the trainer.
5. Select I'm not a robot checkbox for reCAPTCHA if applicable.
6. Review Staff Sign-in Notice text.
7. Click I agree.

Message Prompt

When any user type enters the WIT system, they will be presented with a New or Unread Message prompt like the following figure if they have at least one qualifying message:

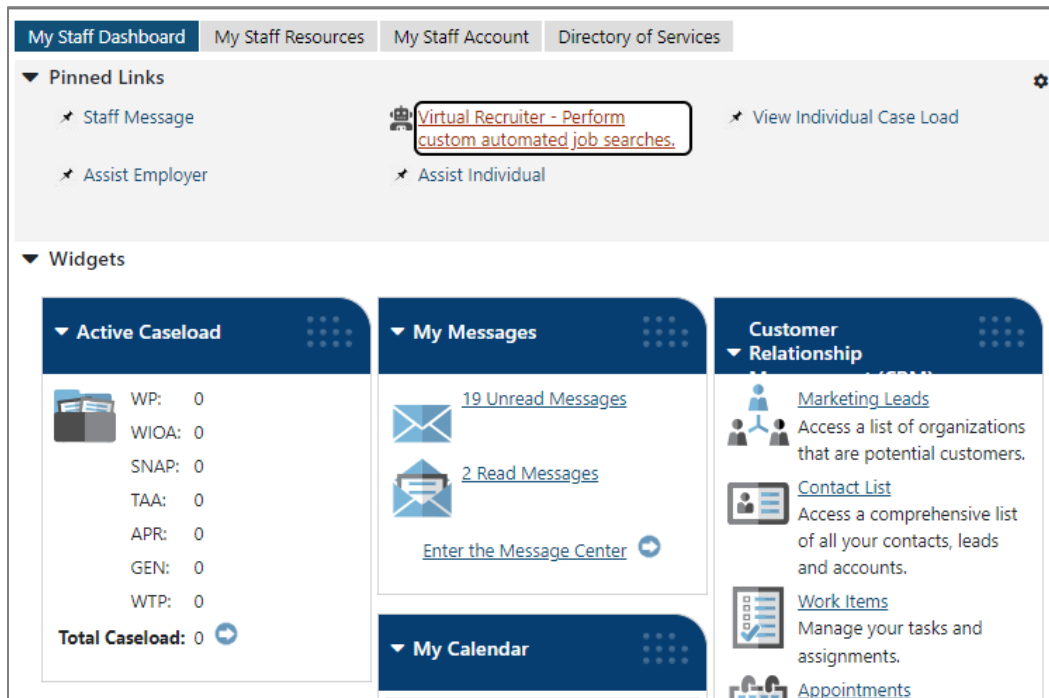


New or Unread Message Prompt

Staff may access their Message Center inbox by selecting the hyperlink text (or the envelop icon) or click Close to view their message(s) later. For more information, see the System Overview training video.

My Staff Dashboard

By default, the WIT system will display My Staff Dashboard, as shown in the sample figure that follows.



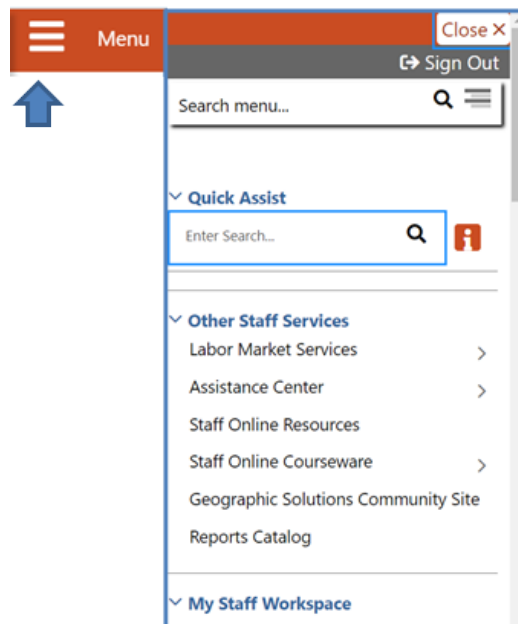
My Staff Dashboard, Excerpt

This feature is a quick way for staff members to view common items and information through widgets as soon as they log in. Widgets provide quick visual access to information that is also available through links or selections within the system. Staff can configure widgets to display at the top of the home screen. For more information, see the System Overview video.

Left Navigation Menu

The following left side-bar menu groups and headings are located under the Menu icon on the top left side (see figure below) of the WIT page.

Note: The order in which staff menu options display may vary. To edit the display, go to **My Staff Account** and scroll down to the **Preferences section**. Find Menu Preferences and then select your menu preferences.



Left Side-Bar Menu

The left navigation menu consists of the following options or groups for staff:

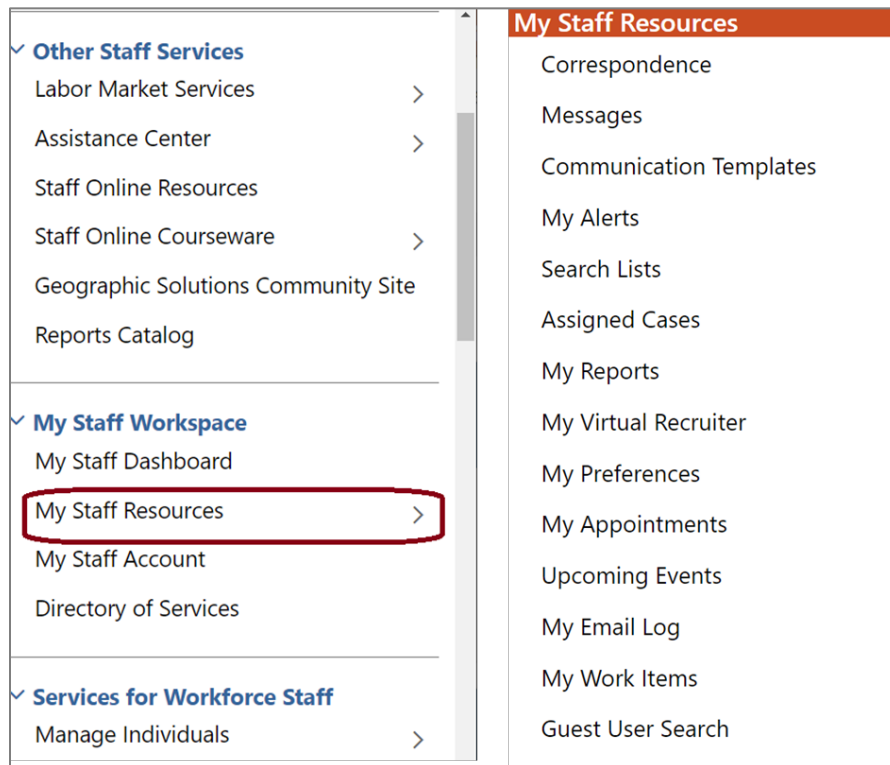
My Staff Workspace

- **My Dashboard** - Landing page when logged on to WIT that consists of Widgets.
- **Quick Assist** - The Quick Assist is available at the top of the left side-bar menu and is based on the last four digits of an individual's SSN, last name, an employer's company name or Federal Employer Identification Number (FEIN), or other criteria.
- **Other Staff Services**
 - **Labor Market Services** - View information about labor markets in your state.
 - **Assistance Center** - Find general site use information such as Quick Reference Cards.
 - **Staff Online Resources** - Develop and maintain a directory of staff member resource information using the Content Management tool in Admin.
 - **Staff Online Courseware** - Access numerous professional online training videos and courses developed for workforce staff members.
 - **Geographic Solutions (GSI) Community Site** - GSI is the vendor for the new WorkinTexas.com software. The community site is a portal to share software **best practices** and to stay current with events and news

pertinent to a specific region, state of the U.S. labor market, and GSI product releases.

- **Reports Catalog** – Access a catalog of standard reports and email a report to other staff members. Allows for formatting a report.
- **My Staff Workspace** – General tools for staff to communicate and set preferences.
- **My Staff Resources** - Provides links to tools commonly used by staff. These include:
 - **Correspondence** - View and manage letters that you have created.
 - **Messages** - View and manage your messages.
 - **Communication Templates** - View communication templates that you may have created.
 - **My Alerts** - View set alerts.
 - **Search Lists** - View saved search lists.
 - **Assigned Cases** – List of individuals currently assigned to you.
 - **My Reports** - View any saved reports.
 - **My Virtual Recruiter** - View and manage Virtual Recruiter scheduler for recurring searches for job openings or candidates.
 - **My Preferences** - Change the interface settings and user experience.

- **My Appointments** - View and manage scheduled appointments.
- **Upcoming Events** - View and manage upcoming events.
- **My Email Log** - View and manage emails sent or received via the system.
- **My Work Items** - For case management, this heading is not currently used.



Staff Left Side-Bar Menu - My Staff Resources

- **My Staff Account** - Provides information on how your staff account is configured, including basic login, name, address, phone, and email. Other options include:

- **Office** - Workforce region and office to which you are assigned.
- **Preferences** - Adjust system default settings for interface screens including alerts, landing pages for assisting individuals and employers, case note sort orders, and menu preferences for summary and detail landing pages. The Left Navigation Menu can also be configured here.
- **Staff Signature**- Maintains a digital copy of the signature you created using your mouse.
- **Directory of Services**-A consolidated list of the left side bar menu groups and functions including Services for Workforce Staff, Reports, Customer Relationship Management, Communications, Templates, Document Management, Schedules, and Other Staff Services.

Services for Workforce Staff

- **Manage Individuals**
 - **Create an Individual** - Create an individual user account.
 - **Common Intake** – Create one application to collect data requirements for multiple federal programs simultaneously.
 - **One Case Note to Multiple Individuals** - Create one case note to distribute to multiple individuals accounts.
 - **Assist an Individual** - Assist an existing individual account.

- **TAA Eligible Worker Layoff List** - Search criteria page for TAA Eligible Worker Layoff List.
- **Upload Rapid Response Individuals** – Select this option to upload a Rapid Response workbook.
- **Manage Outreach Pool** – Used by SNAP and Choices/TANF staff to manage recipient referrals, to set up and manage initial client appointments, and manage appointment rosters.
- **Manage Employers**
 - **Create an Employer** - Create an employer user account.
 - **Assist an Employer** - Assist an existing employer account.
 - **Employer Access Rights** - Modify the employer's access to the system through setting access rights.
 - **Employers Posting Jobs** - Review jobs from internal and external employers.
 - **Local Employer Sites** - Review company profiles from the Data Axle database.
 - **One Case Note to Multiple Employers** - Create one case note to distribute to multiple employer accounts.

- **Manage Resumes**

- **Create a Résumé** - Create a candidate résumé in the system.
- **Search for Résumés** - Search for candidate résumés within the system.
- **Match Resumes to Jobs** - Perform a search for jobs using criteria from a résumé.
- **Candidate Referrals** - Create a candidate referral based on job search.

- **Manage Job Orders**

- **Create an Internal Job** - Create or manage internal jobs.
- **Search for Internal Job** - Search for an existing internal job order.
- **Search for All Jobs** - Search for internal or external jobs.

- **Manage Labor Exchange**

- **Mass Job Referrals** - Create job referrals for individuals.
- **Mass Candidate Referrals** - Create candidate referrals for employers.
- **Enter Referral Results** - Enter job referral results.
- **Referrals Pending Review** - Manage pending referrals to suppressed jobs.

- **Job Candidate Follow-up** - Manage follow-up referrals.
- **Job Skill Sets** - Manage custom job skill sets.
- **External Job Options** - Manage criteria to control the display of external jobs in the system.
- **Manage Activities**
 - **Individual Services** - Manage service plan data for individuals.
 - **One Service to Multiple Individuals** - Create one service for distribution to multiple individuals.
 - **Employer Services** - Manage service plan data for employers.
 - **Event Rosters** - Manage the events roster for registered event participants.
 - **One Service to Multiple Employers** - Create one service for distribution to multiple Employers.
 - **Scheduled Services** - Displays a list of schedules and services for a specific date, office, and service.
 - **Events** - Create events, add participants, and manage the events calendar for system users.
- **Manage Providers** – Create and manage training and service provider accounts.
- **Manage Case Assignment** – Individual Case Assignment and Employer Case Assignment.

- **Manage Funds** – Individual Fund Tracking (IFT) module to track fundable services and manage the budgets that support them. **Not in use at this time.**
- **Manage WARN Notifications** –
 - **Create WARN Notice** – Create a new WARN notice, entering information received from the employer, and send the official notice to any of the appropriate parties.
 - **Search for WARN Notices** – Select this option to view existing WARN notifications in the system.
 - **Partially Completed WARN Notices** – Select this option to view a list of partially completed WARN notices.
 - **Create WARN Visit Record** – Create a record for a WARN planning or orientation visit. Search WARN information to populate information from an existing notification, or manually enter new visit details.
 - **Search for Visit Records** – View existing WARN visit records in the system, and add, edit, delete, or print visit records from this page.
- **Manage Surveys** - Access to preview, edit, and manage active surveys.
- **Manage Online Forms** - Allows staff to create and fill out forms on the individual's or employer's behalf.

Reports – This group offers multiple ways to access, generate and save standard and customized workforce reports. Not covered in this manual.

Customer Relationship Management (CRM) - Offers Employer Outreach Specialists and Business Services Representatives the tools and resources to actively manage employer recruitment efforts, convert potential business customers into Marketing Leads for the purpose of providing assistance to these businesses, and to track the profile details they manage on behalf of these potential recruiting employers.

- **Create a Marketing Lead** - Access and complete a mini-registration for a potential employer recruit.
- **Contacts List** - Displays all primary and secondary contacts from when Marketing Lead employers were created.
- **Marketing Leads** - Displays all primary contacts from when Marketing Lead employers were created.
- **Outreach Campaign(s)** – Manage outbound Outreach marketing campaigns.
- **Work Items** - For case management, this heading is not currently used.
- **Appointments** - Create or view a list of existing appointments.
- **Online Surveys** - Create new survey forms and display all current forms (surveys) created within the CRM module.

Communications - Tools used for communicating with individuals and/or employers:

- **Messages** - Manage messages sent or received with your login.
- **Correspondence** - List letters you saved in the system.
- **Alerts** - Manage staff alerts and text watches on behalf of your customers.
- **Virtual Recruiter** - Set up and manage recurring job and résumé searches.
- **Email Log** - View emails you sent or received.

Communication Templates

- **Job Order Skill Sets** - Create or modify detailed skill sets to find candidates for job openings.
- **Job Order Templates** - Create and manage templates for job orders.
- **Case Note Templates** - Create and manage templates for case notes.
- **Search List** - Manage your saved search lists for individuals and employers.
- **Program Enrollment Templates** - Select this option to manage program enrollment templates.

Schedules

- **Appointment Calendar** - Create and manage appointments.
- **Events Calendar** - View and create upcoming events, track attendees.

- **Event Roster** - Displays event information per office.
- **Staff Availability** – Create and manage staff schedule and availability.

Document Management

- **Search Documents** - Search for electronic documents stored in the system, which have been uploaded and attached to an individual's account portfolio.

SNAP E&T Client System Registration

Training Objectives

After completing this module, you will be able to:

- successfully navigate to **Manage Individuals > Create an Individual**, when tasked with assisting individuals with system registration.
- understand what it means to be a **registered individual**.
- recognize questions that are required versus optional.
- understand questions defined as conditional that may require additional questions to be completed based on participant answers.
- successfully complete system registration for the individual.

Before a SNAP E&T program applicant can receive program services in the WIT system, they must have an account profile. To meet this requirement, staff training participants will manually create a sample individual account by performing the steps that follow.

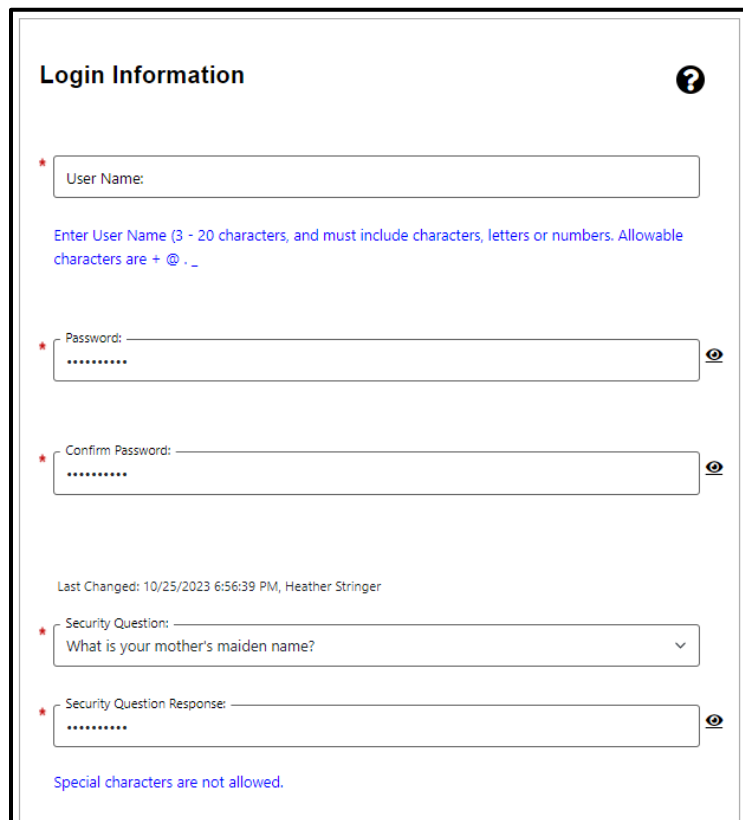
Note: This process will be followed for any SNAP E&T customer who has not cleared HHSC certification and is treated like a walk in. The process covered in training will match a walk-in scenario since the interface does not exist in the training environment.

For a customer being served through the Outreach Process, Client System Registration is handled by the system and will already be complete by the time a Staff Member begins assisting the individual.

Note: Fields marked with a red asterisk (*) are required.

To create an individual account:

1. From the Services for Workforce Staff menu group in the left navigation menu, click **Manage Individuals>Create an Individual**.
2. Complete the Login Information section to enter the individual's desired Username and Password for system login purposes. Re-enter the password again for confirmation.
3. Choose a security question the individual desires and enter a response.



Login Information ?

* User Name:

Enter User Name (3 - 20 characters, and must include characters, letters or numbers. Allowable characters are + @ . _

* Password: 👁

* Confirm Password: 👁

Last Changed: 10/25/2023 6:56:39 PM, Heather Stringer

* Security Question: ▼

* Security Question Response: 👁

Special characters are not allowed.

Login Information Section of Create Individual Account Process

4. In the Name section, enter the individual's first and last name.

Name

* **First Name:**

Middle Initial:

* **Last Name:**

Name Section of Create Individual Account Process

5. In the Social Security Number section, enter the individual's unique nine-digit number and re-enter it. If the individual fails to provide their Social Security Number (SSN), select the checkbox.

Social Security Number

I do not wish to provide my Social Security Number

Do not enter dashes (for example, 999001111)

Social Security Number (SSN):

Re-enter Social Security Number:

Social Security Number Section of Create Individual Account Process

Note: If you select this checkbox, the system will create a pseudo-SSN for the individual, which might limit the scope of program services they can receive.

6. In the Phone Number section, enter the individual's primary phone number.
7. In the E-mail Address section, enter the individual's primary email address and re-enter it in the Confirmation text box.

The screenshot shows a form titled "E-mail Address". It contains two main input fields. The first is labeled "* Primary E-mail:" and contains the text "jschneider88@gmail.com". Below this field are two links: "Create E-mail Account" with an external link icon, and "Read Our E-mail Security Policy" with an external link icon. The second input field is labeled "* Confirm Primary E-mail Address:" and also contains "jschneider88@gmail.com".

Email Address Section of Create Individual Account Process.

8. In the Primary Location Information section, select the individual's country of residence and select whether they are authorized to work in the U.S.

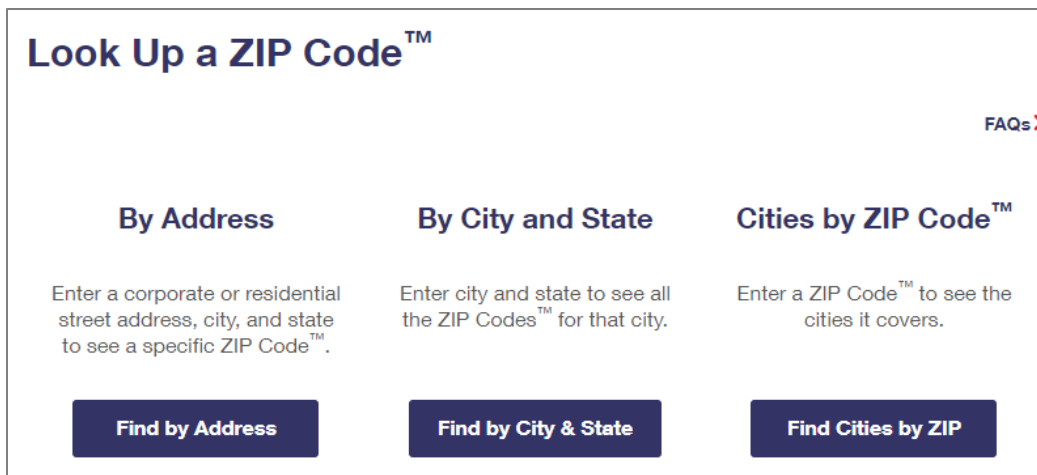
The screenshot shows a form titled "Primary Location Information". It contains two main input fields. The first is labeled "* Country:" and is a dropdown menu with "United States" selected. The second is labeled "* Are you authorized to work in the United States?" and has two radio button options: "Yes" (which is selected) and "No".

Primary Location Information Section of Create Individual Account Process

9. In the Residential Address section, select whether the individual is homeless and enter their address details

accordingly. If the individual's mailing address differs, select the Mailing address is different checkbox to indicate this, and enter the individual's mailing address in the fields displayed.

Note: If unsure of the individual's ZIP Code, select the Find zip code link to access a search screen from the U.S. Postal service, as shown in the figure that follows.



USPS Zip Code Look Up Webpage

10. In the Demographic Information section, enter the individual's date of birth and select their gender. (Optional) Select their Foster Care status.

Demographic Information

* **Date of Birth:** (MM/DD/YYYY)
You indicated your date of birth as August 1, 1988.

Age: 34

* **Gender:** Female Male I do not wish to answer.

I am currently in Foster Care or I have aged out of Foster Care System Yes, Currently in Foster Care
 Yes, I have aged out of the Foster Care System
 No

Demographic Information Section of Create Individual Account Process

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

11. In the Citizenship section, indicate the individual's citizenship status.
12. In the Disability section, select to indicate whether the individual has a disability.
13. In the Education Information section, select the individual's highest education achievement level and their current school status.

Education Information	
* Your Highest Education Level Achieved:	High School Diploma ▼
* Are you attending school?	No, Not Attending Any School ▼

Education Information Section of Create Individual Account Process

14. In the Spouse or Caregiver of a U.S. Military Member section, provide responses for the questions displayed.

Spouse or Caregiver of a U.S. Military Member
Spouse or family caregiver of a Military member or Veteran may be entitled to State and Federal benefits. Please answer the following questions.
* Are you the Spouse or Caregiver of an active U.S. Military member or a Veteran? <input type="radio"/> Yes <input checked="" type="radio"/> No

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

Note: Selecting Yes will trigger the display of additional information and/or questions.

15. In the Military Services section, provide responses to each question.

Note: A Yes response will trigger the display of additional information you must complete, as shown in the sample figure that follows.

Military Service

Veterans may be entitled to additional State and Federal benefits. Please answer the following questions.

- * Are you currently in the U.S. Military or a Veteran? Yes No

Military Service Section of Create Individual Account Process

16. In the Job Title section, enter the individuals preferred job title. As you type, suggested matches will display, from which you may select a title. Enter Quality Control Inspector.

Job Title

Please enter a job title below. As you are entering the job title, you may see a list of common entering. If you see your job title in the list, select it.

* Job Title

Quality Control Inspector

Quality Control Inspector

Quality Control Inspector (QC Inspector)

Job Title 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 in bold text the matching occupation title and code.

17. In the Suggested occupation(s) dropdown menu, select Inspectors, Testers, Sorters, Samplers, and Weighers.

Job Occupation

Please select the occupation that best matches your job title. You may either select from the list which is populated based on the job title above, or you can search for an occupation using the search box.

Suggested occupation(s): Inspectors, Testers, Sorters, Samplers, and Weighers

[Search for an occupation]

* Occupation Title: Inspec

* Occupation Code: 51906100

Job Occupation Section of Create Individual Account Process

18. In the Ethnic Origin section, select whether the individual is of Hispanic or Latino heritage.
19. In the Race section, select all races that apply. Click **Save**.

Race

* Race - Please check all that apply:

African American/Black

American Indian/Alaskan Native

Asian

Hawaiian/Other Pacific Islander

White

I do not wish to answer.

Race Section of Create Individual Account Process

20. In the Language section, indicate whether the individual has difficulty or limited proficiency with English.

Language

Do you have limited proficiency in speaking, writing, reading, or understanding English?
or
Do you have difficulty in speaking, writing, reading, or understanding English?





Yes
 No

Save Cancel

Language Section of Create Individual Account Process

21. A Registration Confirmation page displays (see figure below)

What's Next?

-  [Add information to better match job requirements](#)
Employment and education history are sometimes required in the application process and are used as indicators when comparing jobs with applicants. By completing a few more prompts, you can see how well you qualify for the jobs you have found and employers will compare you favorably against other applicants.
-  [Create a résumé](#)
Some jobs in our system require the applicant to apply with a résumé. This option will help you create that résumé and add the employment history and education. Employers can also search for résumés on our system, so completing a resume will help employers find you.
-  [Apply for Career Services and Training](#)
Federal and state grants are available for qualified applicants to obtain career services and training or get priority assistance. Completing the full registration will help staff identify if you qualify for any of these grants.
-  [Additional Veteran Services](#)
Additional services may be available to you if you are a qualified veteran. We will require you to answer a few more detailed veteran questions.

Sample Registration Confirmation Page


Staff Assisting Individuals

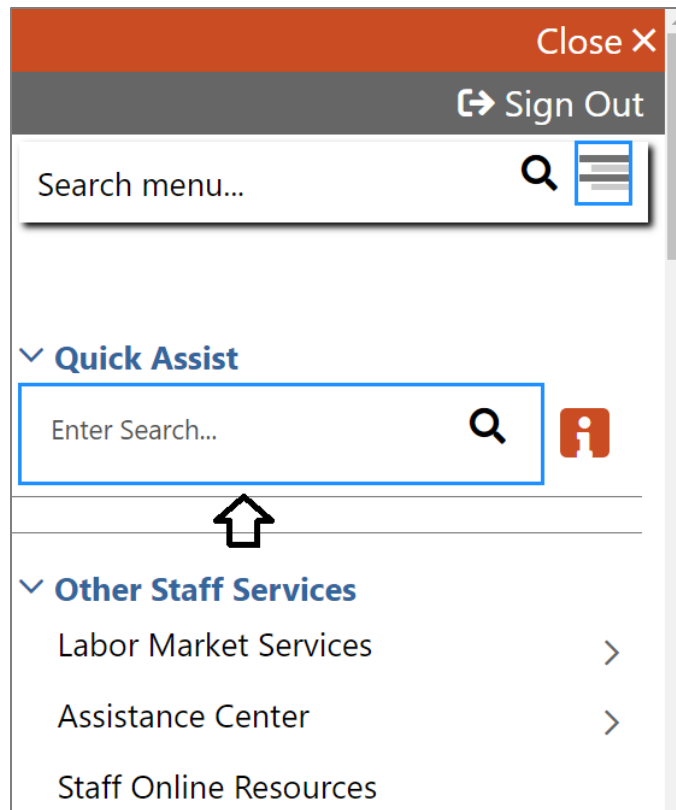
Searching for an Individual and Assisting

Note: The information that follows supports information presented in the System Overview training video.

Once an individual has completed system registration, you can perform a search for their account and provide assistance using any of the following search methods:

- **Quick Assist** - The Quick Assist is a convenient way to search for an individual or employer and is located at the top of the left side-bar menu and is based on the last four digits of an individual's SSN, last name, an employer's company name or Federal Employer Identification Number (FEIN), or other criteria.

Note: The full range of criteria used in the search can be identified by clicking the  Help icon at the right of the search entry field, as shown in the figure that follows.



Quick Search Menu / Help Icon

- **General Search** – To perform a general search for an individual:
 - On the left navigation menu under the Services for Workforce Staff section, select **Manage Individuals** > **Assist an Individual**.
 - A search window is displayed allowing you to specify information about the individual you want to assist.
 - Select a desired name from the **Quick Assist** drop-down box to quickly access one of the last five accounts, you previously accessed or enter criteria to

find a desired individual in the **General Criteria** section (see figure below).

Quick Assist

You have 1 saved Individual item(s) in [My Search Lists](#).

Here are the 5 most recent individuals you assisted: Smith, John (Jsmith123@) [Assist](#)

[\[Top | Search | Bottom \]](#)

General Criteria

Individual Username:

Individual User ID:

Starts with these #s
 Matches exactly

State ID Number:

First Name:

Last Name:

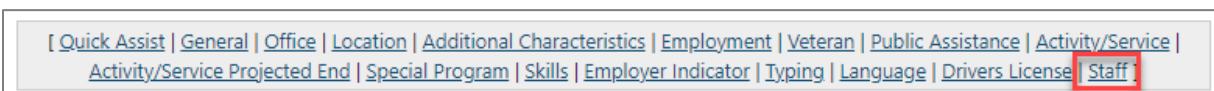
SSN (last 4 digits):

SSN (full number): Example: 999999999

Date of Birth: (MM/DD/YYYY)

Search General Criteria

- **More Search Options** – The **More Search Options** link near the bottom of the page will launch a link menu at the top of the page with additional search options. An example - to conduct a general customer search based on program participation, click the **Staff** jump link (see figure below).



Criteria Options for Performing a Job Seeker Search

If you select a desired program, the system will refresh or redraw the screen to display related customer program groups to filter your selection (see figure below).

Case Management Criteria

Assigned Case Manager: [None Selected] [\[Select Me \]](#)

Program Participation (Active only): [Title I - Workforce Development (WIOA)]

Customer Program Group: [None Selected] (Dropdown menu open showing: None Selected, Adult, Youth, Dislocated Worker, Statewide Youth, Incumbent Worker - Adult, Statewide Adult, Statewide Rapid Response Add'l Assistance DW, Statewide Dislocated Worker, National Dislocated Worker Grant (NDWG), Local Funded Grant, None Selected)

Grant Code:

Provider:

Registration Source:

WTP Referrals:

Search

Case Management Criteria Search Option

- Click **Search** link at the bottom of any section or click the **Search** button at the bottom of the page.
- Sort any column header to reorganize results.
- Click **Modify current criteria** at the bottom of the page to add or remove criteria to change results.
- When you locate your Individual, click on the **Username** (see figure below).

Results View: [Summary](#) | [Detailed](#)
 To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Action	Select
chrisbreezy@	Chris	Brown	0020	No	88			05/06/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>
GSISSOJBROWN	Jane	Brown	6666		12			04/09/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>

[Save New List](#)

2 Records found

SEARCH CRITERIA: Last name begins with brown

Search Results and Actions

Search Result Actions

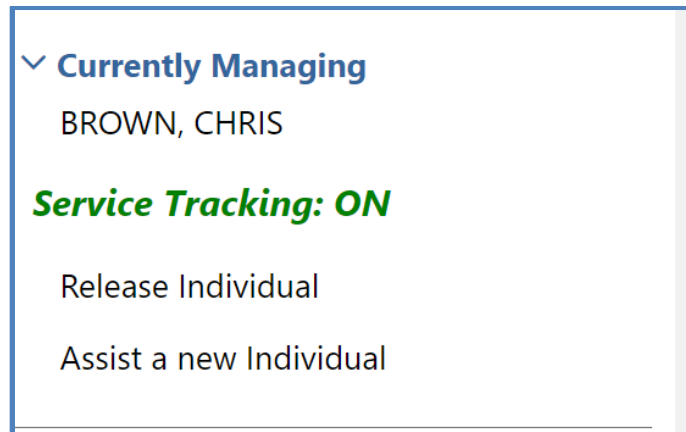
- **Summary Tab** - Case summary of services.
- **Case Notes Tab** - Case Notes for the individual.
- **Activities Tab** - Activities for the individual.
- **Programs Tab** - Wagner-Peyser program details.

Note: Using the My Staff Account feature, staff may customize the hyperlink display under the Actions column.

Currently Managing

When assisting an individual or employer, **Currently Managing** displays on the left side-bar menu with their name and links to the folders, profiles, and specific functions (see figure below). Currently Managing also displays at the top of the page.

Note: A flag and/or (MSFW) will also display next to the name if the individual is a veteran or a Migrant Seasonal Farm Worker.

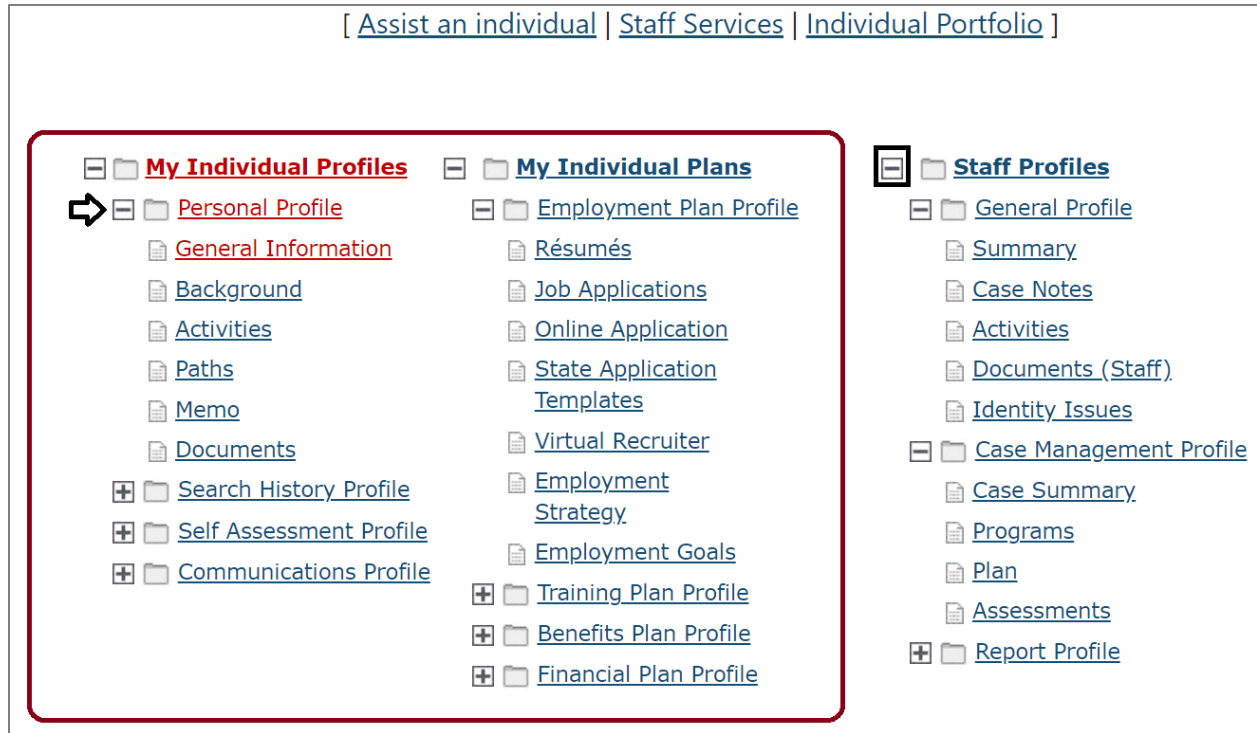


Currently Managing

- **Service Tracking: ON** (indicator) - Refers to the tracking and recording of some services and activities automatically without the need for staff to enter them manually. The **automatic service tracking** design helps staff focus more attention on their customers' needs (see figure above).
- **Release Individual** - When finished working with an individual, select **Release Individual** from the **Currently Managing** menu group (see figure above).
- **Assist a new Individual** - Assist another registered individual.

Individual Portfolio Folders

Individual Portfolio Folders are quick links to an individual's profiles and plans and are located at the top of the page when assisting an individual (see figure below).



Individual Profile Folders

To view or modify the information in the individual’s profiles and plans, click the name of the individual currently being assisted, under **Currently Managing** on the left side-bar menu.

My Individual Profiles

My Individual Profiles stores all the individual’s personal information, keeps track of all searches they performed in the system, provides access to self-assessment tools, and lets them communicate with employers or others regarding their career interests (see figure above).

Folders include:

- **Personal Profile**

- **General Information** - Contact and profile information about the individual as recorded during system registration.
- **Background** - Information that can be used in a résumé or application.
- **Activities** - Self-evaluations and other assessments.
- **Paths** - Individuals collect **badges** as they complete tasks that are designed to help them maximize the system's features, such as creating résumés and completing assessments.
- **Memo** - Blank memo text box where an individual can maintain reminder messages to themselves.
- **Documents** - A list of the individual's documents that have been uploaded to the system.

- **Search History Profile**

- **Jobs** - Searches the individual made of viewed jobs.
- **Employers** - Searches the individual made of viewed employers.
- **Programs** - Lists training programs in which the individual has participated.

- **Scholarships** - Lists any scholarships the individual previously viewed and lets users conduct new scholarship searches.
 - **Occupations** - Searches for specific occupations.
 - **Industries** - Searches for a specific industry.
 - **Areas** - Displays a list of areas previously viewed.
- **Self-Assessment Profile**

Use the individuals listed skills to search for occupations and jobs in the system that require those skills by clicking the **Find Matching Occupations and Jobs** button in each of the following sections:

- **Job Skills** - Displays the job skills selected during registration.
- **Personal skills** - Displays the personal skills selected during registration.
- **Work Interests** - Displays the scores for the Work Interests and Work Interest Analyzer assessments, if taken.
- **Work Values** - Displays the scores for the Work Values and Work Values Analyzer assessments, if taken.
- **Tools and Technology** - Shows the typical tools and technology tools saved to the system, if any.
- **Multiple** – Allows selection of multiple types of self-assessments and combines them to produce a list of

occupations that match the selected skills during registration.

- **Communications Profile** - Contains tools to access and manage communications. Tools include:
 - **Messages** – Collects and stores system messages received, sent, saved, or removed.
 - **Correspondence** - Lists information about the letters and correspondence created in the system.
 - **Communication Templates** – Contains default templates, such as a cover letter for job seekers who are applying for jobs, or a rejection letter for employers who are reviewing job applicants. Also allows creation of new templates.
 - **Subscriptions** - Displays System Alert messages received in your Message Center through your e-mail address or as a text message. System alerts are helpful messages and reminders that the system sends to users who have configured and requested alerts.
 - **Email log** - Contains a list of email messages from the WIT system that have been sent or received. Use the drop-down list to filter between sent and received messages.

My Individual Plans

The following folders quickly display an individual's employment, training, benefits for which they may be eligible, and financial plan profiles.

- **Employment Plan Profile**
 - **Résumés** - Select to display all résumés that the individual has created in the system.
 - **Job Contacts** - Displays job contacts you've entered in the system.
 - **Online Application** - Select to display a brief summary of saved background history used for pre-populating the system application when applying for jobs.
 - **State Application Templates** - Select to display a list of created State of Texas Applications. Allows for creating a new template or application.
 - **Virtual Recruiter** - Select to display the virtual recruiter job alerts set up in the system. Allows for creating new alerts.
 - **Employment Strategy** - Select to access a powerful tool and strategy to quickly find a new job nearby that matches the individual's background.
 - **Employment Goals** - Select to develop an Individual Employment Plan (IEP) and/or Service Strategy.
- **Training Plan Profile** - Displays information about classroom or online training in which an individual has participated.
 - **Classroom Training** - Displays information about training activities that the individual has undertaken, typically through state or federal benefit programs, and

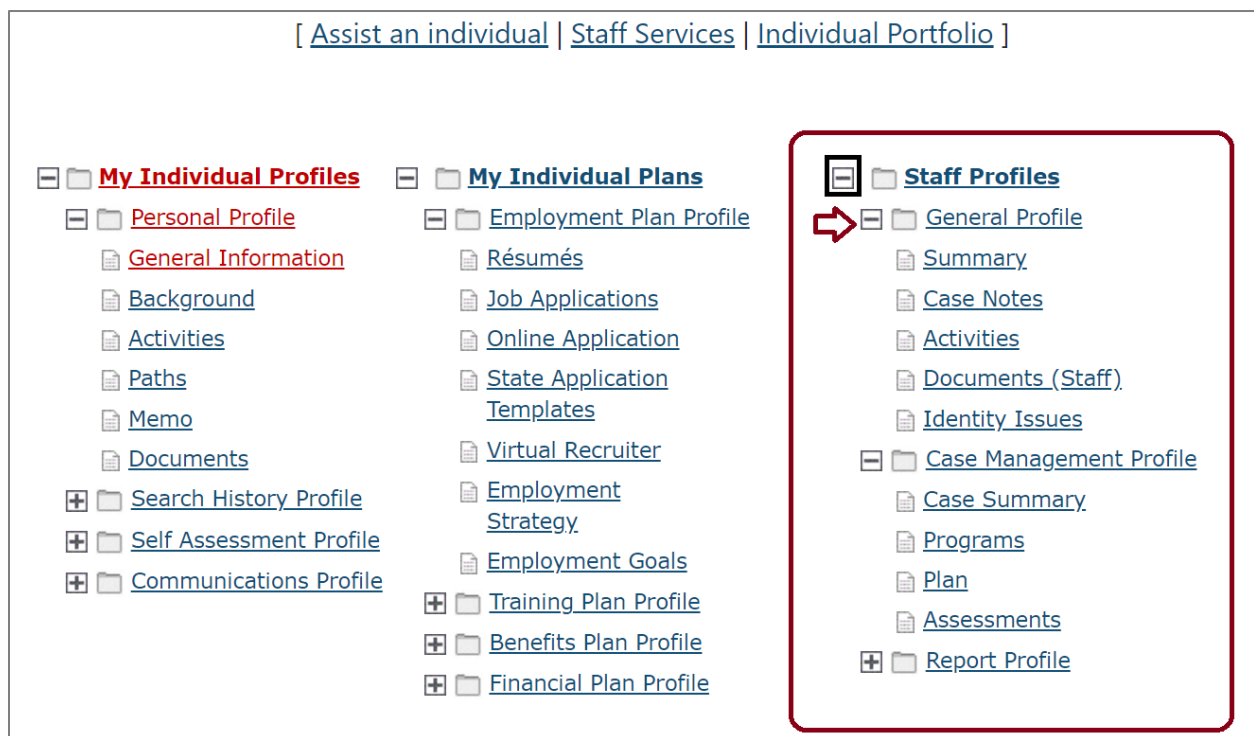
- allows the user to search for training providers or programs.
- **Online Training** - Displays the online training courses that the individual has taken or are currently working on.
 - **Benefits Plan Profile** - Access basic information on government benefits for which the individual may be entitled.
 - **Workforce Innovation and Opportunity Act (WIOA)** - Access basic WIOA program information, the types of services the program offers, and program eligibility information.
 - **Trade Adjustment Assistance (TAA)** - Access basic TAA program information, the types of benefits and services the program offers, and program eligibility information.
 - **Other Benefits** - Includes a list of resources to local, state, and federal benefits for unemployment claimants, veterans, youth, and seniors.
 - **Financial Plan Profile** - Provides tools for individuals to create overall budgets, training budgets, and transition budgets. Folders include:
 - **Financial Literacy** - List of resources to manage personal funds.
 - **Overall Budget** - Tools to create a budget for income and expenses.

- **Training Budget** - Tools to create a budget for training and a list of training resources.
- **Transition Budget** - Tools to create a transition budget that allows individuals to analyze expenses and income for a selected time period and create a plan for a job transition.

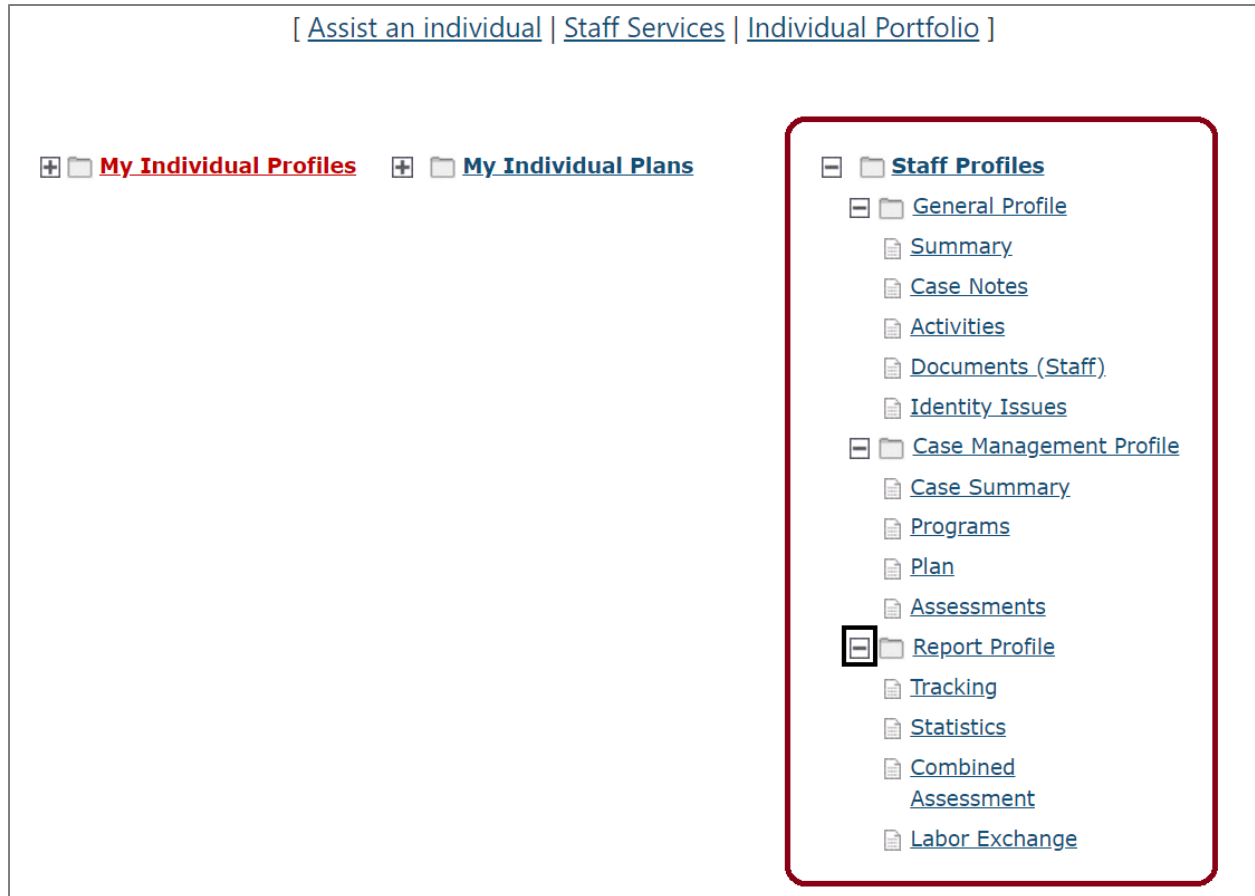
Staff Profile Folders

When you are Currently Managing an individual or an employer, the **Staff Profiles** menu will display staff-specific folders.

Note: Only staff members can view this profile menu (see figure below).



Staff Profile Folders



Staff Profiles When Assisting an Individual

Staff profiles consist of the following folders (see figure above):

- **General Profile** - Enables staff to review summary information on an individual, create case notes, or conduct Wagner-Peyser services.
 - **Summary** - Select to view general information about the individual through several summary panels and review an individual's background.
 - **Case Notes** - Select to create case notes pertaining to the individual in a central location no matter where they are created.

- **Activities** - Select to review an individual's involvement in the Wagner-Peyser program.
- **Documents (Staff)** - Select to interactively upload/import or scan documents into the system. Staff can attach an electronic document to a client's record.
- **Case Management Profile** - Enables staff to manage services for various federal programs, create an Individual Employment Plan (IEP), and maintain recorded assessments. Folders include:
 - **Case Summary** - Select to display information about the individual through several summary panels. Allows staff to review an individual's background.
 - **Programs** - Select to display details of an individual's involvement in federal and local programs. Allows staff to create and manage applications and enrollments for the individual in various programs.
 - **Plan** - Select to display a customer's career goals, skills assessments, and an IEP. This information provides a comprehensive plan or needs analysis that helps direct the types and number of program services provided to the individual.
 - **Assessments** - Select to create and manage assessments that can only be entered by staff (such as Basic Skills Assessments - TABE Test and WorkKeys® tests).

- **Report Profile** - Allows staff to review an individual's tasks, system access, and assessments. Folders include:
 - **Tracking** - Select to review when an individual has accessed specific system components.
 - **Statistics** - Select to monitor an individual's site usage. Contains links to specific created items such as résumés and/or the Virtual Recruiter.
 - **Combined Assessment** - Allows staff to view and print assessments, both self-assessment and case management-related, all on one screen.
 - **Labor Exchange** - Maintains a list of dates and times employers viewed individual's résumés and provides access to employer and résumés details.

SNAP E&T Outreach Pool

Training Objectives

After completing this module, you will be able to:

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

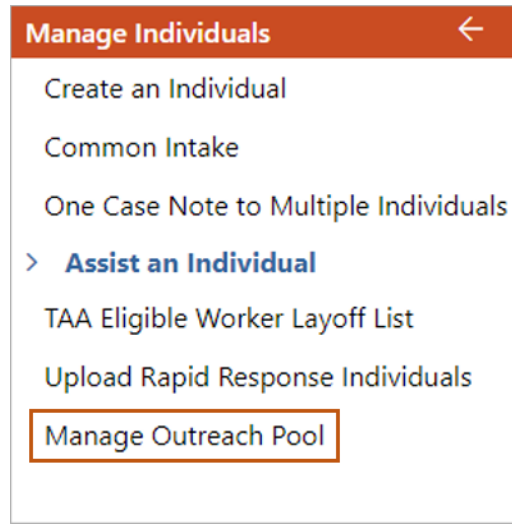
In order for an individual to receive SNAP E&T program services, they must first be approved by HHSC and added to the SNAP E&T Outreach Pool. The referral process for SNAP E&T applicants and SNAP E&T eligible recipients to TWC remains the same with the new WIT implementation. Once HHSC has determined that a SNAP E&T applicant is eligible to receive services, customer data will be sent to WIT overnight via an interface file, creating the client registration if the individual was not already present in the WIT system, and creating an incomplete SNAP E&T application.

Accessing the Outreach Pool

Access to the Outreach pool is provided through the Left Navigation Menu. Select **Manage Individuals** Menu, then select **Manage Outreach Pool**.

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 and then 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 SNAP E&T 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 **SNAP E&T Outreach Management** hyperlink, staff will access the records specific to SNAP E&T applicants referred by HHSC (see image below).

Please select from the Manage Outreach Pool options listed below.

<p>Choices (TANF) Outreach Management Manage HHSC TANF recipient referrals, set-up and schedule Initial...</p>	<p>SNAP E & T Outreach Management Manage HHSC SNAP recipient referrals, set-up and schedule Initial...</p>	<p>Manage Customer Load Exceptions Manage HHSC Choices (TANF) and SNAP E & T interface files' record data..</p>
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[Return to Manage Individuals](#)

Outreach Pool Options

SNAP E&T Outreach Management Options

Once staff members select the **SNAP E&T Outreach Management** link, three primary options will display (pictured below). The options include the following:

- **SNAP E&T Appointment Schedules** – Create, modify, and edit initial appointments.
- **SNAP E&T Outreach Pool Scheduler** – Schedule recipients from the Outreach Pool.
- **SNAP E&T Outreach Rosters** – Manage appointment rosters, finalize recipient scheduling by printing invitation letter, and manage attendance to track cooperation and non-cooperation.

Please select from the SNAP E & T Outreach Management options listed below.

<p>SNAP E & T Appointment Schedules Create Appointment Schedules for SNAP recipients and participants.</p>	<p>SNAP E & T Outreach Pool Scheduler Schedule referred SNAP recipients from the Outreach Pool.</p>	<p>SNAP E & T Outreach Rosters Manage appointment rosters, finalize recipient scheduling by printing...</p>
---	--	--

SNAP E&T Outreach Pool Options

SNAP E&T Appointment Schedules Overview

The SNAP E&T Appointment Schedules option will allow staff members to manage appointment options for 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.

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 Search:

Available Appointment Schedules for SNAP Employment and Training 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
202	14 - Capital Area WF Board, 123 WF SOL Capital Area East	10/30/2023, 9:00 AM	10/30/2023, 10:00 AM	1:00	24	4	100 (96)	North Facility	John Smith	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule
222	14 - Capital Area WF Board, 123 WF SOL Capital Area East	10/27/2023, 9:00 AM	10/27/2023, 12:00 PM	3:00	24	0	75 (75)	MarineFord		Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule

Page 1 of 1

Rows: 10

Add a New Schedule
Cancel

SNAP E&T 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 SNAP E&T Program Appointment Schedule Record Screen displays (pictured below).

Note: Appointment Schedule Record Entry Screen with required fields are marked with red asterisks.

SNAP Employment and Training Program	
* LWDB/Region:	Capital Area WF Board ▼
* Office Location:	123 WF SOL Capital Area East ▼
Program:	SNAP Employment and Training Program
Appointment Type:	1 - SNAP E & T Outreach for Initial Appointment
* Appointment Subject:	SNAP E & T initial appointr
Capacity:	20
* Appointment Date:	04/11/2024 Today
* Appointment Start Time:	09:00 AM (hh:mm am/pm) ⌵
* Appointment End Time:	10:00 AM (hh:mm am/pm) ⌵
* Hours:	1:00 Format (0:00)
* Staff to Contact:	John Marks
Contact Staff Phone:	972 - 555 - 1111 Ext: <input type="text"/>
* Location Name:	Dallas
* Location Address:	3301 S 14th St # 46B
Location Address 2:	<input type="text"/>
* Location Zip Code:	79605
* Location City:	Abilene

Appointment Schedule Record Entry Screen

2. Starting with LWDB/Region and Office location, enter the required information for the event.
3. Enter the appropriate appointment subject.
4. Enter the appointment date.

5. Enter the appointment start time.
6. Enter the appointment end time.
7. Enter the number of hours.
8. Enter a staff to contact name.
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 days will display in the table (pictured below).

Available Appointment Schedules for SNAP Employment and Training 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
31	14 - Capital Area WF Board, 123 WF SOL Capital Area East	09/12/2023, 12:00 AM	09/12/2023, 12:00 AM	1:00	24	0	20 (20)	North Facility	Johnny Cash	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule
32	14 - Capital Area WF Board, 123 WF SOL Capital Area East	09/12/2023, 12:00 AM	09/12/2023, 12:00 AM	1:00	24	0	20 (20)	North office	Christy Wedderburn	Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule

Page 1 of 1
Rows: 10

Add a New Schedule
Cancel
Live Cl

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.

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 the red asterisk.

Hide Filter Criteria

* LWDB/Region:	Capital Area WF Board
Office Location:	<input type="text" value="123 WF SOL Capital Area East"/>
* Program:	SNAP Employment and Training Program
* Appointment Type:	1 - SNAP E & T Outreach for Initial Appointment
* Pool Management Type:	1 - Scheduling
Capacity:	<input type="text"/> <input type="checkbox"/> Override Appointment Schedule Capacity Limit
Date From:	<input type="text" value="04/01/2024"/> Today
Date To:	<input type="text" value="04/15/2024"/> Today
Staff to Contact:	<input type="text"/>
SSN:	<input type="text"/>
Work Code:	<input type="text" value="None Selected"/>

[\[Apply Filters \]](#) | [\[Reset Filters \]](#)

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 filter criteria selected.

Search and Select Individuals within the Outreach Pool

Staff are responsible for scheduling recipients 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 SNAP E&T 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).

SSN	Client Name Client Number EDG Num	Contact HHSC Mailing/Phone	Work Code	SIG	SNAP AppId/Status	SNAP Closed Status	WP App Status	Last Action	Action Select All
XXX- XX- 1001	Long, Emma 100212379 411212379	5125550159	3 - Mandatory/Not working		11634 - Incomplete		WP RI Only	Pending Roster	<input type="checkbox"/>
XXX- XX- 1022	Nelson, Willie 100212382 411212382	5125558000	F - 60 years of age or older		0 - No open application		WP RI Only	Pending Roster	<input type="checkbox"/>
XXX- XX- 1024	Pickett, Bill 100212384 411212384	5125558888	R - Mandatory/Registered again after previously serving E&T penalty		0 - No open application		WP RI Only	Pending	<input type="checkbox"/>
XXX- XX- 1026	Johnson, Jimmy 100212386 411212386	5125556666	4 - Mandatory/Temporarily laid off from job		0 - No open application		WP RI Only	Pending	<input type="checkbox"/>

[\[Remove from List \]](#)
[\[Add to List \]](#)
[\[Print Preview List \]](#)

Save to roster
Return to schedules

Outreach Pool Roster Selection

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.

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

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.
5. For the widest possible search, change both categories above to **None Selected**.
6. 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.
7. Select the **Add to List** hyperlink to prepare records to roster assignment.
8. The Last Action column provides staff members with information about the current state of the individual.
 - **Pending** means the record has been loaded into the temporary table, but no actions have been taken.

- **Pending Roster** means that the individual has been added to a roster.
 - **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.
9. To save the selected individuals to the currently selected appointment, check the action box for all applicants and click the **Save to Roster** button.
 10. 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 orientation, the system creates a partial SNAP application, and the SNAP 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 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 SNAP E&T Outreach Management Page select the **SNAP E&T Outreach Rosters** link. The Rosters List Landing Page will appear (pictured below).

Results View: [Summary](#) | [Detailed](#)
 To sort on any column, click a column title.

Roster ID	Start Date & Time	End Date & Time	Hours	LWDB, Office Location	#Sched	Capacity(Avail)	Location	Staff Contact	Action
45	10/5/2023 12:00:00 AM	10/5/2023 12:00:00 AM	1:00	14- 123 WF SOL Capital Area East	2	20(18)	Workforce Solutions 510 Park St Beaumont,TX 77701		Manage Roster Print Roster
137	10/9/2023 12:00:00 AM	10/9/2023 12:00:00 AM	1:00	14- 123 WF SOL Capital Area East	5	50(45)	North Facility 123 East Main Austin,TX 73301	Frank	Manage Roster Print Roster
202	10/30/2023 12:00:00 AM	10/30/2023 12:00:00 AM	1:00	14- 123 WF SOL Capital Area East	4	100(96)	North Facility 123 East Main Austin,TX 73301	John	Manage Roster Print Roster

3 Records Found

[Cancel](#)

[Live Chat](#)

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.

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

Schedule End Date and Time: 10/24/2023 03:00

Hours: 1:00

Staff to Contact: Brandon Martin

Location: Main Facility

Capacity (Current Available): 15(13)

Scheduled: 2

Pending Letters: 2

Set Attendance Status:

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 AppID/Status	Choices ClosedStatus	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	<input type="checkbox"/>
10846	Palin Sarah 3522222354	1198 San Bernard St AUSTIN, TX 78708 3522222354	61	1	10634-Incomplete		WP RI Only	Pending Letter	10/24/2023 John Marks	<input type="checkbox"/>

2 Records Found

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

Cancel
Print Letters

Roster Page

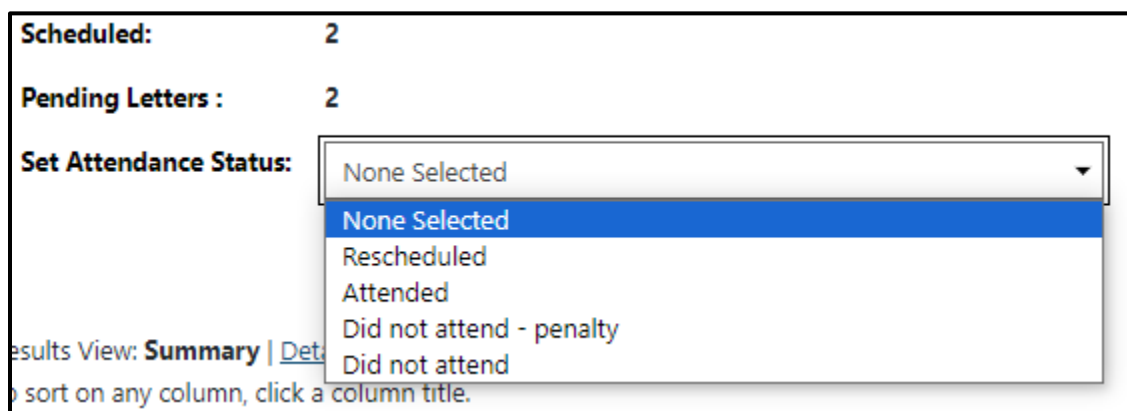
- Select all individuals who need to have letters printed. You'll notice the **Print Letters** button turns red indicating that it is available as a selection.
- Once all users are selected, click the **Print Letters** button. This action officially starts the clock for tracking and **commits** the appointment. The selected letters will move to the user's browser 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.

Note: Staff may view and print the created Outreach letter from the customers documents folder.

Once the letter print date has generated and meetings have been 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

Rescheduling from Roster Management

If the participant needs to be rescheduled, select Rescheduled as the Attendance Status. This will start the process of moving the individual to a different meeting. With the individual selected chose the Update Roster hyperlink in the same way any other roster assignment is made.

Set Attendance Status:

Search:

Results View: [Summary](#) | [Detailed](#)
 To sort on any column, click a column title.

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Work Code	SNAP AppID/Status	SNAP Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
11303	Smith Fatima 100212358	110 San Antonio St Austin, TX 78701 351-666-6666	2	10269-Enrolled		WP RI Only	Scheduled (02/02/2024)	2/2/2024 Brandon Martin	<input checked="" type="checkbox"/>

Roster Management – Rescheduled Status

Once the reschedule process is initiated, the TX WIT system will present the Staff User with the Appointment Scheduling screen. This screen is identical to the appointment selection screen covered earlier in training. The only change is that the Action column displays a Reschedule – Add to Roster option. Simply select the appropriate meeting to reschedule the individual.

Staff can create a new meeting from this screen as well.

Available Appointment Schedules for SNAP Employment and Training 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
128	14 - Capital Area WF Board, 129 WF SOL Capital Area North	02/02/2024, 12:00 PM	02/02/2024, 1:00 PM	1:00	1	1	15 (14)	Main Facility		Reschedule - Add to Roster
129	14 - Capital Area WF Board, 129 WF SOL Capital Area North	02/02/2024, 4:00 PM	02/02/2024, 5:00 PM	1:00	1	0	15 (15)	Main Office		Reschedule - Add to Roster

Page 1 of 1 Rows: 10

Appointment Selection Screen with Reschedule Option

The Staff User is returned to the initial roster page, with the individual now showing a Last Action status of Rescheduled.

<u>Last Action</u>	Record Last Updated	Action Select
Rescheduled (114)	2/2/2024 Brandon Martin	All <input type="checkbox"/>

Original Roster showing Rescheduled Status

On the Roster for the new appointment, the individual will show as Scheduled. From here attendance can be managed in the same way as previously covered.

<u>Last Action</u>	Record Last Updated	Action Select All <input type="checkbox"/>
Scheduled (02/02/2024)	2/2/2024 Brandon Martin	<input type="checkbox"/>

New Appointment Roster showing Scheduled Status

Outreach Pool Addendum

This addendum will cover a variety of topics that are adjacent to the Outreach Pool process. The content covered may or may not be applicable for every individual who moves through the Outreach Pool process.

Accessing Outreach Appointment Letters

If Staff need to access the SNAP initial appointment letters outside of the normal Outreach process, this is done by accessing the Documents section of the General Profile under Staff Profiles with the customer being managed. From here the letter can be viewed and downloaded.

The screenshot shows a navigation menu on the right with 'Documents (Staff)' highlighted. Below the menu is a tabbed interface with 'Documents (Staff)' selected. The main content area is titled 'Documents Available' and contains a table of documents.

Document Name	Document Tags	Program Name	Category	Modify Date	Expiration Date	Action
SNAP_InitialAppt_Letter	SNAP	SNAP Employment and Training	General	11/17/2023 03:53		View Review Edit Download Meta Data Delete

Initial Outreach Appointment Letter

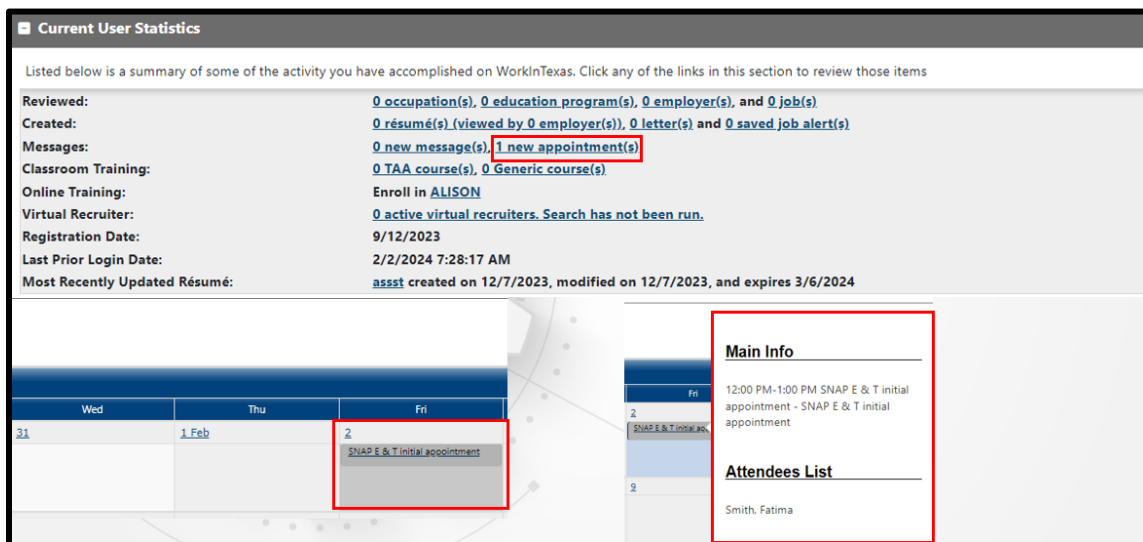
Automatic Calendar Inserts

When the letter is printed during the Outreach process, a Calendar Appointment is automatically created in the participants VOS calendar. This is first visible in the messages section of their individual dashboard. By accessing the calendar, the individual will see the appointment listed on the appropriate date. Clicking on the hyperlink within the calendar will show the official details, including the specific timeframe for the meeting.

This process is identical for SNAP and Choices.

A similar calendar item is also inserted for the Staff Member assigned during the Appointment Creation.

Note: The only difference between staff and individual calendar inserts is that the entire roster will be listed in the Attendees List section for Staff.



Calendar Inserts for Initial Outreach Appointment for Individuals

Creation of Incomplete Applications from Outreach

When the Outreach Letter is generated and printed for the customer, the system will attempt to open an Incomplete program application for the corresponding program. This manifests on the Programs tab of the customer's profile.



Once staff have the customer in view and navigate to the **Program Tab**, they should see an incomplete application under the appropriate program. Instead of selecting **Create application** the staff member would select the pencil icon.

Note: This behavior is identical for SNAP and Choices. Whichever program was selected during the Outreach process will be the one with the Incomplete Application.

Note: There may be times when, for either a technical reason or a data mismatch reason, that an application may not be opened. In those instances, staff would follow the same procedure as if they were assisting a customer via walk-in.

SNAP Employment and Training Apps: 1

[Create SNAP Employment & Training Application](#)

SNAP #20174 - Incomplete  

+

LWDB:	14 - Capital Area WF Board
Onestop:	33 - 123 WF SOL Capital Area East
Open/Total Activities:	0 / 0
Application Date	04/01/2024
Participation Date:	N/A
Closure Date:	N/A
Exit Date:	N/A

SNAP E&T Program Application

SNAP E&T Participant Application

Training Objectives

The following module will focus on primary staff functions used for managing program applications.

After completing this module, you will be able to:

- Navigate to the SNAP E&T application in the Programs tab.
- Confirm prior participation status.
- Enter the required information to complete the program application wizard.
- Review any interfaced or prepopulated data.

When an individual is first referred and enrolled in SNAP, the system stores application information that is imported through an interface with the HHSC, and some information is prepopulated by the initial registration into the program. Staff will only need to verify that the information received is accurate and complete any missing sections, since the referring HHSC agency makes the eligibility determination for SNAP services. **For the purposes of training, we will be entering all application data.**

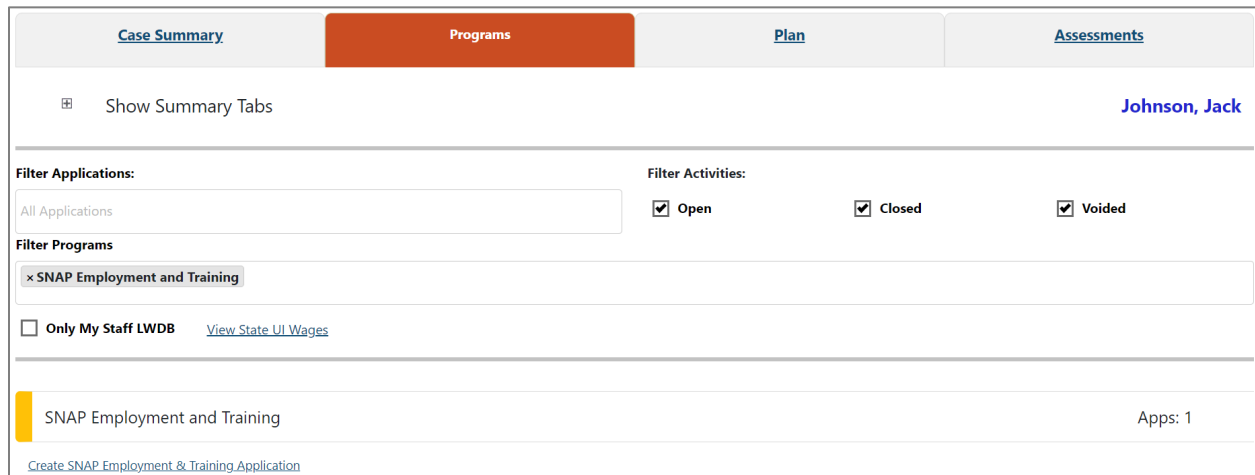
Note: This process will be followed for any SNAP customer who has not cleared HHSC certification and is treated like a walk in. The process covered in training will match a walk-in scenario since the interface does not exist in the training environment.

For a customer being served through the Outreach Process, the SNAP Program Application is started by the system and will already be in an incomplete status by the time a Staff Member

begins assisting the individual. In this instance, the Staff Member would simply edit the existing application via the Edit Pencil instead of clicking Create Application.

To Complete a SNAP application:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. In the SNAP panel, click the **Create SNAP Employment & Training Application** link. The Intro page of the wizard displays with a progress bar at the top.

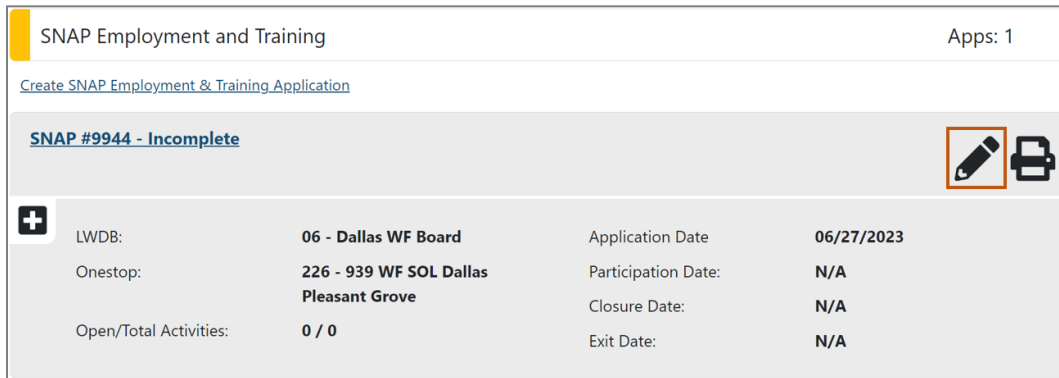


Programs Tab – SNAP E&T Panel

Note: If a Partial application was previously created, for example, from the outreach pool process, you will not click the Create link; the partial app will be listed as **Incomplete** below the link, and you will click the pencil icon on the right side of the panel to open it and complete it.

Scroll down to the **SNAP Employment and Training** section and click the **Create SNAP Employment & Training Application**

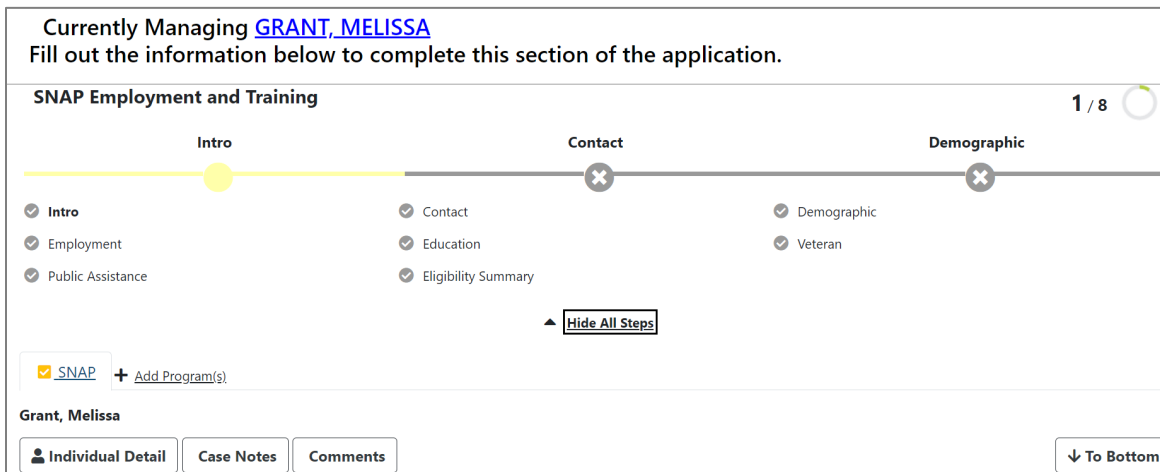
link. The application wizard launches. Many of the fields are already populated for you.



Pre-populated Incomplete SNAP E&T Application Link

You may also need to go through the wizard if an application was started via an interface from another system. There may be required fields on some of the following pages that need to be filled in before the application is deemed as **Complete** and this can be done during the initial meeting with the client.

Navigating the Application Wizard




SNAP E&T Application Wizard Progress Bar and List of Steps

- The application wizard highlights the first step, **Intro**. A progress bar remains at the top of the application through all steps to show progress. To hide the list of steps, click the **Hide All Steps** link; the progress bar remains. To re-display the steps, click the **Show All Steps** link.
- The current step displays as bold with a yellow solid circle on the progress bar; completed steps are green with a check mark in the circle; and incomplete steps are grey with an X in the circle. Once a step has been completed, the step name becomes a link that can be used to navigate to that page.
- To display key details about the individual such as username, email address, and phone number, click the **Individual Detail** button located below the individual's name. Click the **Close Individual Detail** button to close the details display.



Individual Detail Button Located on Intro Page of Application

- Fields marked with a red asterisk are required fields.

* Primary Phone Number:	<input type="text" value="(214) 989-3498"/> 
* Primary Phone Type:	<input type="text" value="Cell/Mobile Phone"/> ▼

Required Fields Indicated with an Asterisk

- If an entry is missing in one or more of these fields when the Next button is clicked, a message displays in red indicating which data is missing. Complete the field(s) and click the **Next** button to proceed.

Please correct the following errors:

- [Customer Program Group is a required field.](#)
- [Office Location is a required field.](#)
- [Activity Code is a required field.](#)

Notification of a Missing Required Field

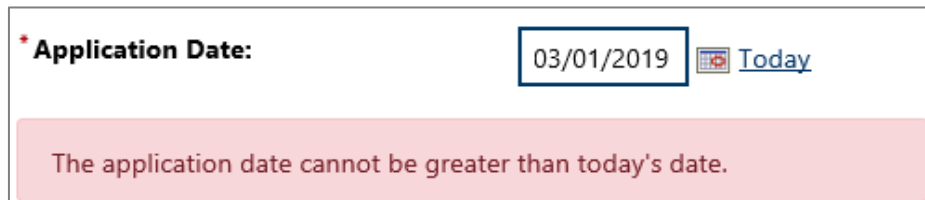
- To save data and advance to the next step in the application, click the **Next** button at the bottom of the page. While the system is Validating and Saving Data, Updating Wizard, and Redirecting to the next step, a progress bar of these activities displays at the bottom of the page.
- Use the **Back** button to return to the previous step.
- Clicking the **Exit Wizard** link located at the bottom of each page exits the application. Data on the current page is not saved; only data entered through the previous page is

saved. Exiting in this manner before the final step is saved, will result in an **Incomplete application**.



Buttons and Links Available at the Bottom of Every SNAP E&T Application Wizard Page

Fields marked with a red asterisk are required fields. If an entry is missing in one or more of these fields when the Next button is clicked, a message displays in red indicating which data is missing. Complete the field(s) and click the Next button to proceed.



Example Notification of a Missing or Incorrect Required Field

If an entry violates a business rule or is incomplete, the system displays a notification in red. Correct the entry to clear the notification (see graphic above). The information icon, the gray circle icon, at the right of each page will display instructions or information for completing the current page.

Completing the SNAP E&T Application Wizard

Intro Page


Many of the Intro page fields are prefilled from the individual's registration.

SNAP Employment and Training


Application is Closed Never Enrolled:

Case Application ID: 20182

Application Information

* Application Date: 04/01/2024  Today

* Participation Type: Mandatory - Gen Pop ▼

* Initial Appointment Date: 04/01/2024  Today

Location & Staff Information

* LWDB/Region: Capital Area WF Board ▼

* Office Location: 123 WF SOL Capital Area East ▼

* Staff Position: Staff ▼

Create Date: 4/1/2024 4:09 PM

Created By: Cekan, Chris

SNAP E&T Application Intro Page

1. **LWDB/Region and Office Location** may be pre-filled based on the default area and office for the staff member working the application; modify, if necessary.
2. Select the **Next** button, located at the bottom of the screen, to validate and save your entries and proceed to the Contact page.

Note: Each time you click **Next**, the current page's data is saved; if you leave the page without clicking **Next** (e.g., by clicking the **Exit Wizard** link or using the browser buttons or history), the data on the current page will not be saved.

Contact Page

Many of the Contact page fields are prefilled from the individual's registration.

Cates, Amanda

[Individual Detail](#) [Case Notes](#) [Comments](#)

Contact Information

* First Name:

Middle Initial:

* Last Name (including suffix e.g. Jr., Sr., PhD, etc.):

* Social Security Number:
[Edit SSN](#)

Residential Address

* Address 1:

Address 2:

* Zip/Postal Code: [Find Zip Code](#)

SNAP Application – Contact Page

1. Ensure that all entries are correct and that all required fields are completed. Required fields are marked with a red asterisk (*). The **Edit SSN** link is available only to staff with proper privileges.
2. To add to or change Alternate Contacts, click the **Add New Contact** link, complete the fields that display, then click **Save**.
3. Click Next to save your edits and continue to the Demographic page.

Note: Data in other sections, such as address and phone information, is prefilled with data previously saved. Review and add or adjust data, as appropriate.

Contact Name	Relationship	Phone Number	Date Inactive	Action
There are currently no alternate contacts for this user.				
Add New Contact				
Add Contact				
* Contact Name:	<input type="text"/>			
Address 1:	<input type="text"/>			
Address 2:	<input type="text"/>			
City:	<input type="text"/>			
State:	None Selected ▾			
Zip Code:	<input type="text"/>	Zip Code Lookup ↗		
* Phone Number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Alternate Contacts Screen

Demographic Page

The Demographic page is largely prefilled with data previously saved in the system. Staff’s primary task on this page is to ensure the information is accurate and edit any information as necessary.

1. Ensure that all entries are correct and that all required fields are completed. Some selections will cause additional required fields to appear.

Demographic Information

*** Date of Birth:** [Edit Date Of Birth](#)

Today's Age: 34

SNAP Eligibility Age: 34

*** Gender:** Female Male Did not self-identify

*** U.S. Citizenship Status:**

*** Hispanic/Latino Heritage:** Yes No Did not self-identify

*** Race (Ethnicity) check all that apply:**

- African American/Black
- American Indian/Alaskan Native
- Asian
- Hawaiian/Other Pacific Islander
- White
- I do not wish to answer.

*** English Language Learner:** Yes No

*** Considered to have a disability:** Yes No Did not self-identify

SNAP E&T Application – Demographic Page

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

Employment Page

Employment page data may be prefilled from the individual’s registration.

Enter the required applicable Employment Status and complete the other fields as applicable and add the applicable Employment History.

Employment Information

Information entered on this screen is related to the specific individual only.

***Employment Status:**

Desired Occupation and Title #1: [Search for O*Net Code](#)

Desired Occupation and Title #2: [Search for O*Net Code](#)

Type of job looking for:

Years of experience in this area:

Type of employment desired:

Full-time or part-time:

SNAP E&T Application – Employment Information Page

1. Add the **Employment Status** by selecting from the drop-down menu.
2. For **Type of Job Looking for**, enter a specific job and select from the list that appears.
3. For **Years of experience in this area**, enter the number of years.
4. For **Type of employment desired**, select from the drop-down list.

5. For **Full-time or part-time**, select Full Time.
6. Under the Individual Employment History section, select the **Add Employment History** link. Complete all of the required fields.

Education Page

Education page data may be prefilled from the individual's registration.

Education Information

Information entered on this screen is related to the specific individual only.

*What is your highest grade completed (from Individual Registration)? Bachelor's Degree

*Are you currently enrolled in school? No, Not Attending Any School

Individual Education History

[View Background Summary](#)

Degree	Issuing Institution	Location	Completion Date	Action
High School Diploma	Cherry Hill High School	NJ	-	Edit Delete

[Add Education History](#)

SNAP E&T Application – Education Page

1. If not already entered, select the client's **highest grade completed** from the drop-down list. If you select any option other than **No School Grades Completed**, you must enter their education history:
 - To add or change entries in the individual's Education History, click the **Add Education History** or **Edit** link. Complete the fields in the pop-up window that opens, and then click **Save**.

Note: Do not complete a history record for education levels below High School (K-8).

2. Specify if the individual is **currently enrolled in school**.
3. Click **Next** to save your edits and continue to the Veteran page.

Veteran Page

The Veteran page is largely prefilled with data previously saved in the system. Edit the responses to the questions as applicable and complete the required Military Service question.

Military Service

* Are you currently in the U.S. Military or a Veteran? Yes No

* 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? Yes No

* Are you within 24 months of retirement or 12 months of discharge from the military (Transitioning Service Member)? Yes No

* Have you served on active duty in the armed forces and were discharged or released from such service under conditions other than dishonorable? Yes No

SNAP E&T Application – Veteran Page

1. Answer the question under the Military Service section, **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.
2. Select the **Next** button to proceed to the next page.

Public Assistance Page

Enter the Case Number if available, otherwise select the **Next** button to proceed to the next page.

Eligibility Summary Page

This is the last page. The Participation Type column identifies the participation type. The Eligible column displays the applicant’s eligibility. It should indicate that he/she is eligible for the SNAP E&T program. If the applicant is not eligible, the reason will display in the Reason(s) Not Eligible column. The Action column displays and option to Set SNAP E&T Eligibility to Yes or No. On this page, is an option to assign a case manager. You should automatically be assigned as the case manager. Assign yourself as the case manager if the system did not assign you as the case manager.

SNAP + Add Program(s)

Jackson, Michael




Individual Detail Case Notes Comments To Bottom

Participation Type	Eligible	Reason(s) Not Eligible	Action
1 - Mandatory - Gen Pop	Meets definition for SNAP: Yes		Set SNAP Eligibility to Yes

SNAP E&T Application – Eligibility Summary Page


1. Select the **Finish** button to complete the application. A confirmation window will open.
 - i. Select **Return to Programs Tab** link. The SNAP E&T Application should now appear as Complete.

On the Programs tab, the Application will now appear as Complete and assigned a unique Case Application ID number.

SNAP #9939 - Complete		 	
	LWDB: 06 - Dallas WF Board	Application Date	06/26/2023
	Onestop: 226 - 939 WF SOL Dallas Pleasant Grove	Participation Date:	N/A
	Open/Total Activities: 0 / 0	Closure Date:	N/A
		Exit Date:	N/A

Completed Application Status

- To view the sections of the application in read-only mode, click the Complete link on the left side of the gray bar.
- To edit the application data in the wizard, click the pencil icon on the right side of the gray bar.

Selecting the **plus sign icon**  below the SNAP E&T Application ID will open the Case Information section which contains ribbons to access information or perform SNAP E&T tasks for the customer. You can now access the SNAP E&T program ribbons to provide SNAP E&T services.

Case Information

Case Number:	Participation Type: Mandatory - Gen Pop
Location and Staff	
LWDB: 06 - Dallas WF Board	Onestop: 226 - 939 WF SOL Dallas Pleasant Grove
Create Staff: Chris Cekan (30029)	Edit Staff: Chris Cekan (30029)
Case Manager: 161 Dallas (4760)	Temporary Case Manager: N/A

- HHSC Information**
- Benefits Information**
- Communication Letters**
- Participation**
- Activities / Enrollments / Services**
- Attendance**

Case Information and SNAP E&T Ribbons Menu

SNAP E&T HHSC Information Ribbon

Training Objectives

The following module will focus on reviewing participant information captured and interfaced by HHSC.

After completing this module, you will be able to:

- Navigate to the HHSC Information Ribbon.
- Review Interfaced data.


Before Texas Health and Human Services (HHSC) refers an individual to SNAP E&T, they will gather data to determine if the person meets certain criteria for SNAP E&T.



Sites configured for a batch job interface will have HHSC data imported to the SNAP E&T module nightly, which will include the HHSC Client ID number, any Service Needs Assessment (SNA) information, or any other information HHSC collected to determine if the person meets participation criteria.

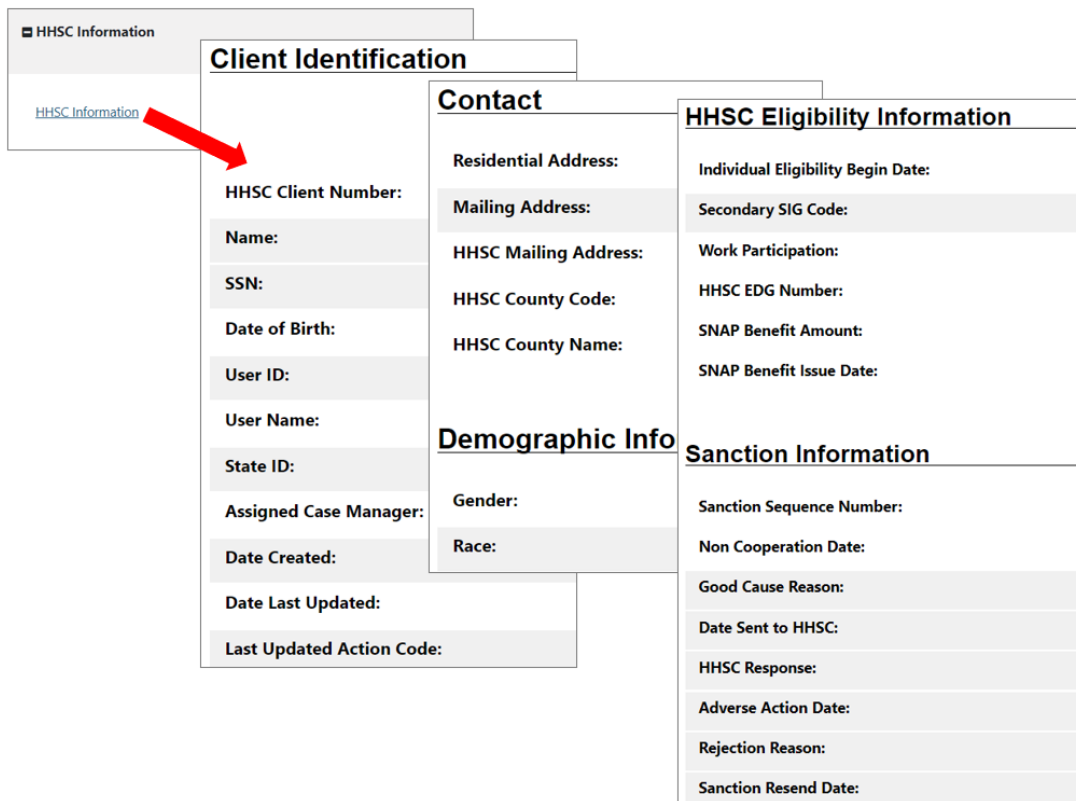
The information from this interface displays on a form that staff can view or print from the individual's Programs tab under the HHSC Information ribbon (see figure on the next page), and which the SNAP E&T case manager may find useful to complete the application and start services for the individual.

To view imported HHSC information:

1. Find and assist the desired individual, then navigate to their Programs tab.

Note: If you already have the individual’s account open, 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 and skip to step #3 below.

2. Click the **plus sign icon**  to expand their SNAP E&T Program application panel.
3. Click the **plus sign icon**  to expand the HHSC Information ribbon and click the **HHSC Information** link.



The screenshot shows a software interface with a ribbon menu at the top. The 'HHSC Information' ribbon is selected and expanded. A red arrow points to a blue link labeled 'HHSC Information' within this ribbon. Below the ribbon, the form is organized into several sections:

- Client Identification:** Includes fields for HHSC Client Number, Name, SSN, Date of Birth, User ID, User Name, State ID, Assigned Case Manager, Date Created, Date Last Updated, and Last Updated Action Code.
- Contact:** Includes Residential Address, Mailing Address, HHSC Mailing Address, HHSC County Code, and HHSC County Name.
- Demographic Info:** Includes Gender and Race.
- HHSC Eligibility Information:** Includes Individual Eligibility Begin Date, Secondary SIG Code, Work Participation, HHSC EDG Number, SNAP Benefit Amount, and SNAP Benefit Issue Date.
- Sanction Information:** Includes Sanction Sequence Number, Non Cooperation Date, Good Cause Reason, Date Sent to HHSC, HHSC Response, Adverse Action Date, Rejection Reason, and Sanction Resend Date.

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.

SNAP E&T Benefits Information Ribbon

Training Objectives

After completing this module, you will be able to:

- Validate information sent via interface.
- Modify filters related to Benefit history.
- Identify Benefit data available.

To view the benefits interface:

1. From the SNAP E&T ribbons menu, select the **Benefits Information** ribbon.

The Benefits Information Ribbon is a historical record of all benefit payments received under SNAP E&T participation. This information is provided by HHSC via an interface upload to the WIT system.

This page is a view-only section, that utilizes filters. Staff members will not have the ability to perform any data entry within this ribbon.

WorkinTEXAS.com
Currently Managing WOUNDEDONE, TESTINGPIR(SBE)

Currently Managing: WOUNDEDONE, TESTINGPIR(SBE)
HHSC Client Number: test

Hide Filter Criteria

Show: Last 3 Months

- OR -

Customized date range:

From: 04/01/2023 Today

To: 05/31/2023 Today

[Apply Filters] [Reset Filters]

Search: _____

Service Month	Benefits Issue Date	Benefits Amount	Warrant File	EDG Number	Partial Month Begin Date	Partial Month End Date	WPS Code	HHSC Type Program	Work Code	Primary SIG	Secondary SIG	Zip	County	LWDB Office
January 2023	01/01/2023	\$100.01	Yes	999	01/01/2023	01/01/2023	1 - Disregarded from participation rate, single custodial parent with child under 12 months.	03 - Medicaid only/TANF grant < \$10	M - Mandatory	0 - Disqualified caretaker	K - Child whose mother is under 20 and is on the same grant; L - Minor child with child of her own	32819	1	

Page 1 of 1 Rows: 10

Benefits History Table

To facilitate reviewing the benefit history for the participant, various filter options are available to staff members. These include:

- Show Filter allows for quick selection of a particular timeframe.
 - All
 - Current
 - Last Month
 - Last 3 Months (default option)
 - Last 4 through Last 12 months are also selectable.
- Customized Date Range allows you to select a specific date.
 - Select a **From** date by entering a specific date in the field, selecting the calendar icon, or clicking the **Today** hyperlink.

- Enter a To date by entering a specific date in the field, selecting the calendar icon, or clicking the **Today** hyperlink.

Based on the filter selections available, a table will present with each instance of benefit payments listed out as a separate row.

The following data set columns are available:

- Service Month.
- Benefits Issue Date.
- Benefits Amount.
- Warrant File.
- EDG Number.
- Partial Month Begin Date.
- Partial Month End Date.
- WPS Code.
- HHSC Type Program.
- Work Code.
- Primary SIG.
- Secondary SIG.
- Zip.
- County.
- LWDB Office.

SNAP E&T Participation Ribbon

Training Objectives

After completing this module, you will be able to:

- Navigate to the Participation Ribbon.
- Create/Complete a participation information.

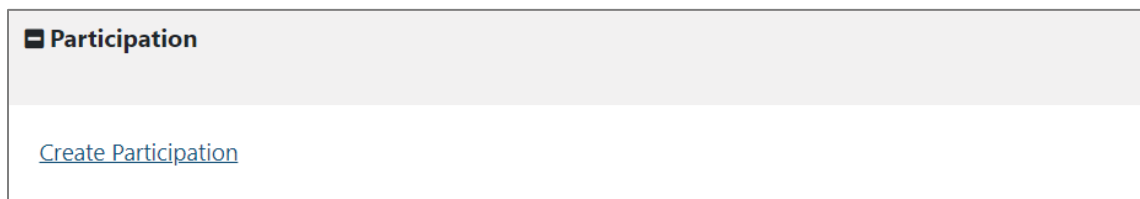
Staff must complete the Participation information before they can add any activities or services for the participant. Normally you will do this right after completing the application, and then enter the first activity.

By design, the SNAP E&T participation record is collected and saved before the first enrollment and linked to the individual's initial SNAP E&T enrollment record, which means staff must complete both records to achieve program participation on behalf of the client.

Creating a Participation Record

To create a Participation Record:


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



Participation Ribbon

3. Enter the **Participation Date**.
4. Enter **Highest Education Level** completed.
5. The **Participation Type** will prepopulate with Mandatory – Gen Pop.

Participation Information

* **Participation Date:** (mm/dd/yyyy)  Today

Participation Age: 20

* **Highest Education Level Achieved (at Application):** ▼

* **Participation Type:** ▼

Participation Record Form

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 to add the activity code.
8. The **Actual Begin Date** is prepopulated for you.
9. Select the **Projected End Date**.
10. Select the **Next** button. The **Service Provider** tab opens.

11. Click the Provider, **Select Service, Course or Contract** link to add a new Service.
12. Select the **Next** button. The **Closure Information** tab opens.
13. If you are ready to Close the service fill out the closure information. If the service is staying open just click 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.

Once the Participation form is saved, the link changes to Edit Participation in the Participation ribbon.

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).

Status	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	S73 - SNAP E&T Appointment Activity No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S72 - Auto SNAP E&T Assessment No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S71 - Auto SNAP E&T Orientation No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S70 - SNAP E&T Participation Notice Activity No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close

Activities/Enrollments/Services Ribbon with Existing Activities

- To update an existing service, click the wizard icon (round purple icon) in the Actions column (see figure above). The Activity Enrollment wizard displays on the General Information tab.

SNAP E&T Work Readiness Assessment Ribbon

Training Objectives



After completing this module, you will be able to:

- Navigate the Work Readiness Form.
- Capture potential participant barriers.

The Work Readiness Assessment (WRA) is an optional form you can use to identify needs and barriers to employment for a SNAP E&T participant. The Barrier categories include Basic Needs, Educational Factors, Health Factors, Judicial System Involvement, and Employability. You can also attach various assessment results, including Basic Skills and Aptitude, to the WRA.

The WRA acts as a living document that may be updated any time the participant's circumstances change. Modifications made to the WRA will have history tracking so original answers can always be viewed.

Create Work Readiness Assessment for SNAP E&T participant:

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 panel.
3. Click the **plus sign icon**  to expand the Work Readiness Assessment ribbon.

4. Click the **Create Work Readiness Assessment** link. The Work Readiness Assessment form displays (see figure below).

Basic Needs Evaluation	
*Housing:	<input checked="" type="checkbox"/> No issues reported <input type="checkbox"/> Has difficulty paying for food, utilities, bills, etc. <input type="checkbox"/> Facing eviction <input type="checkbox"/> Living in unsafe conditions <input type="checkbox"/> Resides in a shelter or temporary housing arrangement <input type="checkbox"/> Homeless <input checked="" type="checkbox"/> Add "Housing" barrier
*Personal/Family Issues:	<input type="checkbox"/> No issues reported <input checked="" type="checkbox"/> Children having problems in school <input type="checkbox"/> DFPS Involvement <input type="checkbox"/> Household members with health issues <input checked="" type="checkbox"/> Add "Personal/Family Issues" Barrier
*Child Care Availability:	<input type="checkbox"/> Has adequate and reliable childcare <input type="checkbox"/> Childcare is not needed at this time <input type="checkbox"/> Needs help arranging childcare <input checked="" type="checkbox"/> Lacks adequate and/or reliable childcare <input type="checkbox"/> Child with special needs who requires specialized care <input type="checkbox"/> Lacks reliable childcare within reasonable distance to/from home, work, or activity site <input checked="" type="checkbox"/> Add "Child Care Availability" Barrier
*Child Care Expenses:	<input type="checkbox"/> Has sufficient resources to cover expenses <input type="checkbox"/> Childcare is not needed at this time <input checked="" type="checkbox"/> Financially unable to pay childcare expenses <input type="checkbox"/> Needs childcare subsidy such as CCS <input checked="" type="checkbox"/> Add "Child Care Expenses" Barrier

Work Readiness Evaluation Form

5. 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.
 - i. When there are one or more barriers for a subcategory, you can click the red **Add <subcategory> Barrier** checkbox, and that subcategory will display in a list of current subcategory barriers when the form is saved. The summarized list is shown in the Barriers to

Employment section at the bottom of the form and in the summary table of the Work Readiness Assessment ribbon of the Programs.

- ii. If there is no barrier for a subcategory, check the No Issues Reported box.
 - iii. To add a barrier that is not represented on the form, enter it in the **Other** text box in the Other Barriers Not Listed section, and then click the **Add Barrier** link. It is added to a box that displays. Repeat for as many barriers as needed.
6. Add any optional **comments** in the text box in the Comments section.
 7. To add or create an assessment record, such as Basic Skills or Aptitude, click one of the links in the Test Information (see figure on previous page). From any assessment page that displays, you can select an existing assessment record or create a new one to add to the WRA.
 8. Click the **Save** button. The Programs tab redisplay with form listed in a summary table in the Work Readiness Assessment ribbon.



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

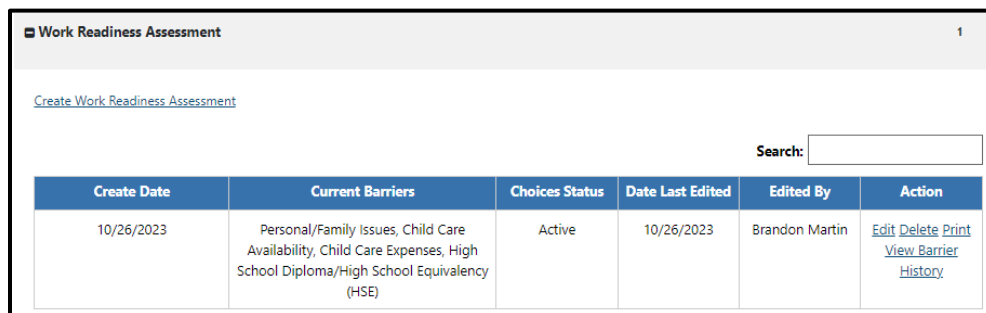
Work Readiness Assessment Table

Managing an Existing Work Readiness Assessment

From the Work Readiness Assessment ribbon of an individual’s Programs tab, you can modify, print, and delete a WRA form, as well as view the history of barrier changes. Every time you edit and save the WRA form, the barrier category changes (added/removed) are added to a history table for tracking purposes.

To manage an existing WRA:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their SNAP E&T Program application section.
3. Click the **plus sign icon**  to expand the Work Readiness Assessment ribbon and see the existing assessment (see figure below). To edit the form, skip to step 5.



The screenshot shows a web interface titled "Work Readiness Assessment" with a page number "1" in the top right. Below the title is a link "Create Work Readiness Assessment" and a search bar labeled "Search:". Below these is a table with the following data:

Create Date	Current Barriers	Choices Status	Date Last Edited	Edited By	Action
10/26/2023	Personal/Family Issues, Child Care Availability, Child Care Expenses, High School Diploma/High School Equivalency (HSE)	Active	10/26/2023	Brandon Martin	Edit Delete Print View Barrier History

Work Readiness Assessment Ribbon with Existing Assessment

4. From the Work Readiness Assessment ribbon, tasks you can perform are:

- i. **Delete WRA form** – Click the **Delete** link in the Action column to open the WRA page. Scroll to the bottom and click the **Delete** button, then click **OK** to confirm.
- ii. **Print WRA form** – Click the **Print** link in the Action column. A PDF viewer window opens, from which you can print or download the form.
- iii. **View barrier history** – Click the **View Barrier History** link in the Action column. A pop-up window opens, listing barrier categories that were removed (**closed**) from the WRA (see figure below).

Barrier History						
Barrier	Date Identified	Date Closed	Closed By	Date last Edited	Edited By	Action
Personal/Family Issues	10/26/2023	10/26/2023	Brandon Martin			Delete

[Close Barrier History](#)

Barrier History Table

- 5. To edit the WRA form, including closing out barriers, click the **Edit** link in the Action column.
- 6. When all desired changes have been made to the WRA form, click the **Save** button. The Programs tab redisplay.

Adding and Removing Barriers

To add a new barrier, check its checkbox. To add its subcategory to the Barriers to Employment table (if not already added and thus grayed out), click its red **Add <subcategory> Barrier** checkbox, as well (see figure below).

* **Physical Issues:**

- No issues reported
- Receiving treatment from a licensed physician
- Currently has significant physical health issue(s)
- In rehabilitation or recovery from significant health issue
- Add "Physical Health Issues" Barrier

Adding a Barrier and Its Category to the Barriers to Employment Table


If a barrier is no longer applicable, uncheck its checkbox. If no barriers within a subcategory are checked as applicable, check the first checkbox in the section, often labeled **as No issues reported** (see figure below). For example, uncheck the **Has limited/no work history** box, and check the **No issues reported** box.


* **Work History:**









- No issues reported
- Has limited/no work history
- Sporadic or short-term episodes of employment
- Recently fired from a job for misconduct
- Frequent job changes
- Minimal or insufficient earnings from self-employment
- Add "Limited Work History" Barrier

Removing a Barrier and Setting a Barrier Category to No Issues Reported

Editing and Removing Categories from the Barriers to Employment Table

To change the date on which a barrier category was first identified, click the **plus sign icon**  to the right of the date in the Date Identified column, enter the new date, and click the **OK** button (see figure below).

To remove a barrier category (e.g., **Work History** in figure above) from the Barriers to Employment table (when it is no longer applicable for the client), scroll down to the table, locate the desired category, and click the **plus sign icon**  to the right of **Close Barrier in the Action column** (see figure below).

Barriers to Employment		
Barriers to Employment	Date Identified	Action
Child Care Availability	10/26/2023   OK	Close Barrier 
Child Care Expenses	10/26/2023   OK	10/26/2023   OK
High School Diploma/High School Equivalency (HSE)	10/26/2023 	Close Barrier 



[View Barrier History](#)

Closing a Barrier Category and Changing Identified Date in the Barriers to Employment Table

If the date is accurate, click the **OK** button; if needed, change the date on which the category should be marked as **Closed** and then click **OK** (see figure above).


Editing and Removing Entries from the Barrier History Table

To view the Barrier History table, click the **[View Barrier History](#)** link below the table in the Barriers to Employment section. To close the section, click the **[Close Barrier History](#)** link (see figure below).

Barrier History						
Barrier	Date Identified	Date Closed	Closed By	Date last Edited	Edited By	Action
Personal/Family Issues	10/26/2023 	10/26/2023 	Brandon Martin	10/26/2023	Brandon Martin	Delete

[Close Barrier History](#)

Barrier History Table

To change any dates in the table, click the **plus sign icon ** to the right of the date in either date column, enter the new date, and click the **OK** button.

To delete an entry from the history record, click the applicable **[Delete](#)** link in the Action column and click **OK** to confirm.

SNAP E&T Activities, Enrollments, Services Ribbon



Training Objectives

After completing this module, you will be able to:

- Navigate to the Activities/Enrollments/Services Ribbon.
- Add appropriate Activities, Enrollments, and Services for plan participation.
- Enter and identify provider details.

After individuals have been approved for participation in SNAP E&T, you can begin enrolling them in activities and services. Once services have been rendered to assist the participant with overcoming any barriers to employment, you can place them in an appropriate countable activity.









To add a new activity, enrollment, or service:

1. If coming from the individual's Participation record after completing an application, you will come to the General Information tab of the Activity Enrollment wizard; skip to the General Information Tab below or, 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. Any activities added previously display in a table from which staff can view and modify the activities (see below).


Activities / Enrollments / Services 4

[Create Activity / Enrollment / Service](#)

Search:

Status	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	S73 - SNAP E&T Appointment Activity No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S72 - Auto SNAP E&T Assessment No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S71 - Auto SNAP E&T Orientation No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S70 - SNAP E&T Participation Notice Activity No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close

Activities/Enrollments/Services Ribbon with Existing Activities

- Click the **Create Activity / Enrollment / Service** link to create an activity or click the wizard icon  in the Actions column to update an existing one. The Activity Enrollment wizard displays on the General Information tab.

General Information Tab

The General Information tab records basic information about the individual, assisting staff member, and service the individual is seeking. Selections made on this first tab determine the available activity/service codes, service providers, and services, courses, or contracts available in later steps.

Enrollment Budget		Budget Planning		Closure Information	
General Information		Schedule	Service Provider	Enrollment Cost	Financial Aid
General Information					
Participant User Name:	AAL11108				
Participant State ID:	45216				
Last Name, First Name MI:	Jim, [REDACTED]				
Address:	[REDACTED] Ave ORLANDO, FL 32826-0000				
Application Summary:	Program: SNAP Employment and Training Application Date: 11/01/2022 Eligibility Date: 11/01/2022				
Participation Date:	11/01/2022				
* Customer Program Group:	50A - SNAP E and T ▼ [Select program enrollment template.]				
* LWDB:	CareerSource Central Florida ▼				
* Office Location:	CareerSource Central Florida - 4591 West Or ▼				

Activity Enrollment Wizard - General Information Tab

1. The Customer Program Group section is automatically set to **50A – SNAP Gen Pop**. The **LWDB and Office Location** determine the list of services and activities displayed in the next section. Select the LWDB and the Office Location from the drop-down menu.
2. If hours will be counted toward reporting, enter the **Assigned Hours** for the client. This minimum will vary, depending on the program eligibility rules.

Enrollment Information

Counts Toward Reporting: **Yes**, hours recorded for this service / activity / countable work activity will count towards reporting.

Assigned Hours: Example: 9999

*** Activity Code:** Vocational Training - [Select Activity Code]

* An actual begin date or a projected begin date is required.

Projected Begin Date: (mm/dd/yyyy)

Actual Begin Date: (mm/dd/yyyy)

*** Projected End Date:** (mm/dd/yyyy)

To select an activity, click on an activity link below. Activities that do not have a link mean there are no programs offered for the selected customer group and / or region.

Activity Code	Activity Title	Description	Provider Type
S01	SNAP E&T - Orientation	Not Provided	PS - Office Services
S02	SNAP E&T - Assessment	Not Provided	PS - Office Services
S03	Job Search - SNAP E&T	Not Provided	PS - Office Services
S04	Job Search Training - SNAP E&T	Not Provided	PS - Office Services
S06	Education - SNAP E&T	Not Provided	SS - Other
S07	Vocational Training - SNAP E&T	Not Provided	SS - Other
S08	Engagement in WIOA/TAA - SNAP E&T	Not Provided	PS - Office Services
S09	Staff-initiated-Online-Auth - SNAP E&T	Not Provided	PS - Office Services
S30	Vendor Payment (SNAP E&T) - Tuition	Not Provided	SS - Other
S31	Vendor Payment (SNAP E&T) - Books	Not Provided	SS - Other
S32	Vendor Payment (SNAP E&T) - Tools for Component	Not Provided	SS - Other
S33	Vendor Payment (SNAP E&T) - Uniform for Component	Not Provided	SS - Other

Selecting an Activity Code from the General Information Tab

3. Click the **Select Activity Code** link to open an activity list, and then click an activity link to select it. The **Activity Code** and description fields are populated (see figure above).
4. If you have a **Projected Begin Date** for the service, enter it. If this is the first enrollment activity, it defaults to the participation date and cannot be changed. If this is for a follow-up service, this must be later than the closure date.
5. If you have an **Actual Begin Date**, enter that. If this is the first enrollment activity, it defaults to the participation date and cannot be changed.

Note: You must enter either a projected or actual begin date.

6. Enter the Projected End Date.

Note: Your site's service code configuration may prevent you from entering a projected end date that exceeds defined

parameters; for example, if the defined duration of an activity/service cannot exceed 90 days, the system will prevent you from saving a projected end date 91 days or greater than the actual start date.

7. If your site has configured the **Occupational Training Code** field, and this is for a training-related service or activity, click the **Occupational Training Code** link to open a pop-up window to search for an occupation by keyword, and then select an occupation from the displayed list.
8. In the Staff Information section, confirm or select your **Position**, if applicable.

Staff Information

Staff ID: GSISAO

* Position:

Case Assignment:

Primary	Group Name	Case Manager	Temporary Case Manager	Action
Yes	SNAP Pinellas	Marmol	Not Applicable	Remove

[Assign Case Manager](#)
[Assign Me](#)

Comments:

Case Notes:

[Add a new Case Note \(Opens in a new window\)](#) | [Show Filter Criteria](#)

ID	Create Date	Subject
		Edit

General Information Tab - Staff Information Section

9. Optionally, you may perform any of the following steps to complete this section:
 - Change the case manager assignment.
 - To assign this applicant to an authorized SNAP E&T case manager, click the **Assign Case Manager** link.
 - To assign this participant to yourself, click the **Assign Me** link (you must be currently assigned to the appropriate SNAP E&T case assignment group).
 - To remove the currently assigned case manager, click the **Remove** link.
 - If applicable, enter Comments regarding this enrollment record.

Note: To add a case note (using the **Add a new Case Note** link), you must first save the enrollment record, and then edit it to add the note.

10. Click **Next** to save the information and proceed to the next tab.
11. The **Service Provider** tab opens.
12. Click the **Select Service, Course or Contract** link to add a new Service.
13. Select the **Next** button. The **Closure Information** tab opens.
14. Select the **Finish** button.

Note: If the activity requires scheduling, the Schedule tab displays; otherwise, the wizard skips to the Service Provider tab.

Schedule Tab

The Schedule tab displays when you have selected an activity or service that requires scheduling, as defined in the VOS Admin system (see figure below), for example, training, detailed assistance, or counseling. Use the Schedule tab to enter the times during the week in which the participant will participate in the selected activity / service. If the selected service does **not** require scheduling, the Schedule tab is skipped, and you go directly to the Service Provider tab.

General Information	Schedule	Service Provider	Enrollment Cost	Financial Aid	
Enrollment Schedule Countable Activity					
Enrollment Summary: Enrollment ID: 1441 Username: LSANCHEZ1+ SNAP Employment and Training Application ID: 11757 Activity Code: 328 - Occupational/Vocational Training (Non-ITA) Activity Dates: 10/5/2023 - 10/6/2023					
Day of the week	Scheduled		Supplemental		Total Hours
Sunday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Monday	8:00 AM	10:00 AM	<input type="text"/>	<input type="text"/>	02:00
Tuesday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Wednesday	8:00 AM	10:00 AM	<input type="text"/>	<input type="text"/>	02:00
Thursday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Friday	8:00 AM	10:00 AM	<input type="text"/>	<input type="text"/>	02:00
Saturday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	00:00
Total Scheduled Hours					06:00

Service Admin Setup and Activity Enrollment Wizard - Schedule Tab

1. In the first two columns under the Scheduled heading, click a clock icon in each field to add a start and end time for each day of the week that the individual will participate in the activity. You may also enter start and end times in the columns for

Supplemental hours of participation if there is a break in hours due to a split schedule (see figure above).

2. Click **Next** to save your entries and move to the Service Provider tab.

Service Provider Tab

The Service Provider tab lets you identify the provider of the service selected on the General Information tab, select the service, course, or contract name, and optionally select the physical location and contact person associated with the service.

Enrollment Service Provider Information

Enrollment Summary: Enrollment ID: 2460900
 Username: BEDWARDS2270
 JOBS Application ID: 160348215
 Activity Code: W37 - Employment Counseling - WT
 Activity Dates: 11/1/2022 - 1/16/2023

* **Provider:** WTP Office Staff Services
[\[Select Provider \]](#)

* **Service, Course or Contract:** WT Office Services
[\[Select Service, Course or Contract \]](#)

Provider Locations: WTP Office Staff Services
 100 Main Street
 Clearwater, FL 33761
[\[Select Provider Locations \]](#)

Provider Contacts:
[\[Select Provider Contacts \]](#)

* **Occupational Training Code:** Not Applicable

Activity Enrollment Wizard - Service Provider Tab

1. To select a **Provider**, click the **Select Provider** link to view a list of service providers that match the data relationships established on the General Information tab (Customer Program

Group, LWDB, Office, and Activity Service Code). Click on a Provider Name link to select it. If there is only one provider for the service, their name is prefilled.

2. To select a **Service, Course, or Contract**, click the **Select Service, Course or Contract** link to view a list of services the selected provider offers. Click on a name link to select the service. If there is only one service, course, or contract from that provider, it is prefilled.

Note: If the desired provider and/or service is not found, you can review the provider account (Manage **Providers** ▶ **Assist a Provider**) to ensure its information was properly set up. Examples of possible errors include a provider's (or program's) inactive status, the wrong provider type, the wrong program affiliation, or no provider services have been created.

3. To select the location of service delivery, click the **Select Provider Locations** link. Click on a location link to select it. If there is only one location for the provider, it is prefilled in the **Provider Locations** field.
4. To select a provider representative staff may contact for assistance, click the **Select Provider Contacts** link. Click on a name link to select it. If there is only one provider contact for the location, their name is prefilled in the **Provider Contacts** field.
5. If the selected provider and program requires additional details, such as **Unsubsidized Employment**, a Worksite Information section displays below the provider information.

- Enter the **Worksite Name, Address** information, **Contact Name, Phone Number, Hourly Wage**, and **Weekly Hours**.

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

Note: The Enrollment Cost Tab, Financial Aid tab, Enrollment Budget tab, and Budget Planning tab screens are required for program services flagged as **fundable**. The system's fund tracking module tracks all fundable services but is reserved for future use. This means the system will bypass these **funding-related** screens and display the final tab screen titled Closure Information.

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

Tabs for Fundable Enrollment Activities

If your site does not have specific funds allocated for training SNAP E&T participants, and is not set up for enrollment budgets and planning, then the Activity wizard skips from the Service Provider tab to the Closure Information tab.

For sites that use the **Advanced Individual Fund Tracking (AIFT)** module to allocate funds for training SNAP E&T participants, the following funding-related tabs display for staff to document and track costs related to fundable activities/services:

- **Enrollment Cost Tab** – This tab screen is reserved for future use.
- **Financial Aid Tab** – This tab screen is reserved for future use.



- **Enrollment Budget Tab** – This tab screen is reserved for future use.
- **Budget Planning Tab** – This tab screen is reserved for future use.

Closing an Activity, Enrollment, or Service

The Closure Information tab of the Activity Enrollment wizard defines the outcome at the conclusion of the activity/service and is completed only when you are making a final closure of the activity/service enrollment.

Note: If an activity is not yet complete and you come to this tab when adding a service, simply leave the fields blank and click **Finish**.

To close an activity/service:

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 Activities / Enrollments / Services ribbon. All previously added services are displayed in a table. Open activities have an **●** icon in the Status column (see figure below).

PE ⓘ	EE ⓘ	Status	ID #	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	○	8201	205 - Individual Employment Plan (IEP/EDP) Sample Office Service Provider	W	SNAP Gen Pop	N/A	N/A	03/22/2024	03/22/2024	Close
<input type="checkbox"/>	<input type="checkbox"/>	○	8198	153 - Workforce Services Orientation ⓘ Sample Office Service Provider	W	SNAP Gen Pop	N/A	N/A	03/22/2024	03/22/2024	Close

Page 1 of 1

Rows: 10

Activities/Enrollments/Services Summary Table

- Click the **Close** link in the Actual End Date column for the desired activity. The Closure Information tab displays (see figure below).

[General Information](#)
[Schedule](#)
[Service Provider](#)
[Enrollment Cost](#)
[Financial Aid](#)

[Enrollment](#)
[Budget Planning](#)
Closure Information

Closure Information

Enrollment Summary: Enrollment ID: 2460900
 Username: BEDWARDS2270
 JOBS Application ID: 160348215
 Activity Code: W37 - Employment Counseling - WT
 Activity Dates: 11/1/2022 - 1/16/2023

Last Activity Date: [Today](#)

Completion Code:

Case Notes:
[\[Add a new Case Note \(Opens in a new window\) | Show Filter Criteria \]](#)

ID	Create Date	Subject	Action
No data found.			

[<< Back](#)
[Finish](#)
[Delete](#)

Closure Information Tab

5. Enter the **Last Activity Date**. This cannot be a future date.
6. Select the appropriate **Completion Code**.
7. 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.
8. Click **Finish**. The Programs tab redisplay with the activity status closed in the Activities / Enrollments / Services ribbon of the SNAP program container.

Note: Authorized staff may void an invalid enrollment activity/service; however, this does not apply to the first enrollment record, because that establishes program participation. Staff should seek assistance from their supervisor if they mistakenly documented the first program activity/service, and it cannot be edited to correct the mistake.

Managing the SNAP E&T Service Table

The WIT system displays various information in the service table to help staff manage program service details on behalf of the individual (see image below).





Activities / Enrollments / Services								
Status	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	S73 - SNAP E&T Appointment Activity No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S72 - Auto SNAP E&T Assessment No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S71 - Auto SNAP E&T Orientation No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S70 - SNAP E&T Participation Notice Activity No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close

Activities/Enrollments/Services Ribbon with Existing Activities

These include the following:

- **PE checkmark** – indicates whether the service triggers program entry, based on the characteristics assigned by the System Administrator.
- **EE checkmark** – indicates whether the service extends soft exit to avoid a 90-day lapse in service delivery, based on the characteristics assigned by the System Administrator.

- **Status** – indicates the status of the program service. The system displays a status legend at the bottom of the screen (see image below). Values include:
 - O = Open
 - C = Closed
 - S = System Closed
 - V = Voided

Activity Status:  = Open,  = Closed,  = System Closed,  = Voided

Status Legend at the Bottom of the Program Page

- **Activity/Provider** link – when staff selects this link, WIT presents the program service details in view mode.
- **Actions** link – when staff selects this link, WIT presents the program service details in edit mode. This is referred to as the Edit Wizard.

Note: This is the preferred view option for most staff users.

- **Funding/Grant** display – indicates the selected customer program group for the service.
- **Projected Begin Date** – displays the future start date entered for the service. The system displays N/A if no date was entered.
- **Actual Begin Date** – displays the actual start date entered for the service. The system prevents staff from entering a future date in this field.

- **Projected End Date** – displays the estimated end date entered for the service.
- **Actual End Date** – displays the actual completion date entered for the service. The system prevents staff from entering a future date in this field.

In addition to these informational displays, WIT also provides filtering tools to help staff manipulate the information shown. These include:

- **Search field** – enables staff to enter a keyword (for example, a service name) by which to search for and filter the current services displayed.
- **Page navigation controls** – enable staff to access the first, previous, next, and last pages displayed for multi-page service table.
- **Rows filter** – enables staff to increase the number of rows per page, thus decreasing the total number of pages displayed.

Individual Employment Plan (IEP)

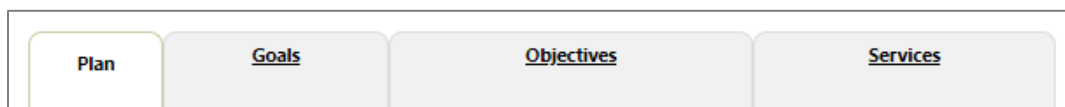
Training Objectives

After completing this module, you will be able to:

- Locate the IEP/ISS.
- Create and manage IEP Goals.
- Create IEP Objectives.

The IEP is an ongoing employment strategy, jointly developed by the participant and case manager, that identifies the participant's employment goals, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goals.

Note: A participant can only have one IEP open at a time, although staff from other programs may also create an IEP for the individual, so it becomes a shared commodity between/among programs. The IEP itself must be created first (Plan tab), followed by the plan's goals. A goal must be created before objectives for that goal can be recorded.



Tabs of the Individual Employment Plan/Service Strategy

The tabs must be completed in order and contain the following information:

- **Plan Tab** - Contains general information about the participant, the program they are enrolled in, and plan dates.
- **Goal Tab** - Enables staff to establish or edit goals for an IEP/SS.
- **Objectives Tab** - Enables staff to add associated with IEP/SS Goals in two ways: creating a new objective manually or selecting from a list of pre-defined objectives.



Note: Some programs may not offer pre-defined objectives.

- **Service Tab** - Displays all services provided for the individual within the program(s) selected. All services provided should relate back to the IEP objectives and goals.

To create an IEP for the assisted individual:

1. Select the **Plan** link under the Case **Management Profile** link or select the **Plan** tab located next to the Programs tab.
2. Under the Individual Employment Plan/Service Strategy section, click the **Create Individual Employment Plan/Service Strategy** button. The Plan tab of the IEP displays. If the individual has any other programs that may also be available for **funding needed activities or services**, a Currently Participating In section displays. If there are no other programs, this section does not display.

3. In the **Plan Information** section, complete the required fields, then click Next to save your data entry.

Plan Information	
* Plan Start Date	<input type="text" value="06/23/2023"/> (mm/dd/yyyy)  Today
* LWDB/Region	<input type="text" value="Capital Area WF Board"/> ▼
* Plan started in office location	<input type="text" value="123 WF SOL Capital Area East"/> ▼
Plan closed on	<input type="text"/> (mm/dd/yyyy)  Today

Create IEP - Plan Tab

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

1. To add a goal for the plan, click the **Add New Goal** link. The Add New Goal page displays (see figure below).

Goal Information

* **LWDB/Region** Capital Area WF Board ▼

* **Office** 123 WF SOL Capital Area East ▼

* **Program Affiliation** SNAP Employment and Training

* **Type of Goal** Employment ▼

* **Term of Goal** Long Term ▼

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

* **Date Established** 08/30/2023 (mm/dd/yyyy) Today

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. Select a **Type of Goal**: Employment, Training, Schooling, etc.
5. Select the **Term of Goal**: **Short term** Long Term, Intermediate Term.
6. Enter a **Description of Goal**.

7. Enter the **Date Established** for the goal.
8. Enter the **Estimated Completion Date** for the goal.

Note: Leave the **Actual Completion Date** blank and the **Completion Status** set to **Open**. When closing the goal, you will enter the Actual Completion Date, select **Closed**, and indicate the Reason Closed.

9. Enter any additional information in the **Goal Details** text box.
10. Click **Save**. The Goals tab redisplay with a table displaying the added goal along with links to Edit or Delete.
11. Repeat this procedure for as many goals as desired.
12. Click **Next** to proceed to the **Objectives** tab, where you add objectives that support the goals.

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

1. In the **Objective Information** section, click the **Add new objective** link to enter an objective for the individual manually.

Objective Information	
* Goal	Become and remain independent of cash assistance through earnings. ▼
Goal Date Established	8/30/2023
* LWDB/Region	Capital Area WF Board ▼
* Office Location	123 WF SOL Capital Area East ▼
* Program Affiliation	SNAP Employment and Training ▼
* Objective	Attend cooking skills training
* Date Established	08/31/2023 (mm/dd/yyyy) 📅 Today
* Review Date	10/15/2023 (mm/dd/yyyy) 📅 Today

Create IEP – Add New Objective Page (Manual Entry)

2. Select the **Goal** to be associated with this objective. The Goal Date Established field fills in automatically with the goal date.
3. Select the **LWDB/Region, Office Location, and Program Affiliation.**
4. Name the Objective, which is an activity that will serve to achieve the associated goal.
5. Enter the Date Established for the objective and the Review Date on which progress should be evaluated (defaults to 45 days after Established Date).

Note: Leave the Actual Completion Date blank and Completion Status set to **Open**. When closing the objective, you will supply the Actual Completion Date, select **Closed**, and indicate the Reason Closed.

6. Enter any additional information in the Objective Details text box.

7. Click **Save**. The Objectives tab redisplay with the added objective along with links to Edit or Delete the objective.
8. Repeat this procedure for as many objectives as desired.

Pre-defined Objective: Instead of defining an objective in a free-form fashion, pre-defined objectives may be available for selection based on the program affiliated with the goal.

Note: Pre-defined objectives must be set by the State and may not necessarily apply to this program.

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).
3. Select the **LWDB/Region** and **Office Location** if it's not already populated.
4. Select the Program Affiliation for the objective. 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
<input type="checkbox"/>	Employment - Attend Job Fair	<input type="text"/> (mm/dd/yyyy) Today.	<input type="text"/> (mm/dd/yyyy) Today.
<input type="checkbox"/>	Employment - Complete Company Applications	<input type="text"/> (mm/dd/yyyy) Today.	<input type="text"/> (mm/dd/yyyy) Today.
<input type="checkbox"/>	Employment - Complete State of Texas Application	<input type="text"/> (mm/dd/yyyy) Today.	<input type="text"/> (mm/dd/yyyy) Today.
<input type="checkbox"/>	Employment - Internships	<input type="text"/> (mm/dd/yyyy) Today.	<input type="text"/> (mm/dd/yyyy) Today.

Create IEP – Select Pre-Defined Objective Page

- Click the checkbox in the left column for each objective to add to the individual’s program goal.
- Enter the Date Established for each objective and the Review Date on which progress should be evaluated.

Note: The objective Established Date must be greater than the Goal Established date, and the Review Date defaults to 45 days after the Established Date.

- Click **Save**. The **Objectives** tab redisplay with the added objectives, along with links to Edit or Delete each of the objectives.
- Click **Next** to proceed to the **Services** tab to review (see figure below).

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.

IEP/ISS Services					
App # - program	Service/Activity	Begin Date	End Date	Provider	Staff
10690 - SNAP	153 - Workforce Services Orientation	A - 08/16/2023	A - 08/16/2023	Sample Office Service Provider	30391
10690 - SNAP	203 - Comprehensive Objective Assessment	A - 08/16/2023	A - 08/16/2023	Sample Office Service Provider	30391
10690 - SNAP	205 - Individual Employment Plan (IEP/EDP)	A - 08/16/2023	A - 08/16/2023	Sample Office Service Provider	30391
10690 - SNAP	328 - Occupational/Vocational Training (Non-ITA)	A - 08/16/2023	A - 08/17/2023	Sample Training Service Provider	30391

Create IEP – Services Tab

Note: By default, the system will automatically create service/activity 205 – Individual Employment Plan (IEP/EDP) when staff creates the service and display Employment Service under the Provider column heading.

- Click **Finish** to complete the **IEP/SS** plan. The **Plan** tab of Case Management Profile redisplay with the IEP listed (see figure below).

Individual Employment Plan/Service Strategy							
#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
1674	Capital Area WF Board	123 WF SOL Capital Area East	OPEN	1	Cekan, Chris	08/30/2023	Edit Delete Display/Print

Completed IEP Table

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 two checkboxes (see figure below).

Plan Information

* Plan Start Date (mm/dd/yyyy)

* LWDB/Region

* Plan started in office location

Plan closed on (mm/dd/yyyy)

When printing plan do you want to print services?

When printing plan do you want to print Goals?

Plan Information Section of IEP Plan Page

3. To include Applicant and/or Staff Signatures, in the **Remote Signature** section, click the **Capture Signature** link for the desired person (see figure below).

The screenshot shows a web interface titled "Remote Signature". It contains two signature lines: "Applicant Signature:" and "Staff Signature:". To the right of these lines is a red-bordered box containing two "Capture Signature" buttons, each with a stylized signature icon. At the bottom of the interface are two green buttons labeled "Return" and "Print".

Remote Signature Section of IEP Plan Page

A pop-up window displays, where you select how the signatures will be obtained (see figure below).

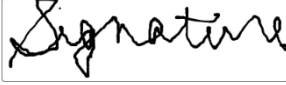
The pop-up window is titled "Select Signature Input Method". It contains two options: "Manual" with a mouse icon and the text "Using a pointer device", and "Message" with a speech bubble icon and the text "Send signature request from the Message Center". A blue "Cancel" button is located at the bottom right of the window.

Signature Capture Method Pop-up Window

- 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.

CERTIFICATION OF UNDERSTANDING: I also understand, acknowledge, agree and certify that:

- I accept my responsibilities in the use of electronic signatures as described on this form.
- My execution of an electronic signature performed on this system is the legally binding equivalent of my traditional handwritten signature, and I am accountable and responsible for actions performed under such an electronic signature
- I may not share components of my electronic signature such that my signature could be executed by another individual. Such components may include, but are not limited to, computer passwords and/or unique identification tokens.



Clear Cancel Apply

Signature Capture Window

- 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 (see figure below).

Recipient Info

* Selected Recipient(s): Grace Hernandez ✕ ▲

Selected Recipient(s) Number: 1

Recipient: Grace Hernandez

Sender Information

* From:

* Created by:

Delivery Method

* Select Method:

Internal Message (Message Center)

Email (if Available)

Text Message (if Available)

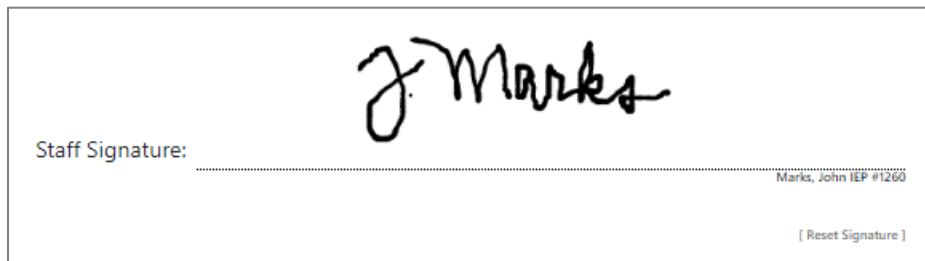
Use Recipient's Preferred Notification Method

Request Read Receipt: Yes No

You will also receive an email notification if you select Text Message or Text Message Notification

Compose Electronic Signature Request Message Page, Top Portion

4. 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.



Staff's Digital Signature – System Provided

5. 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.

Assessment Results in Assessments tab

Training Objectives

After completing the module, you will be able to:

- understand how to record assessment results.
- understand which assessments are recorded in the Assessments tab.

The Assessments tab is where records of assessment types and assessment results pertaining to the client are maintained.

Note: Staff may record assessment results for the individual as a SNAP E&T program participant.

To access the Assessments tab for the assisted individual:

1. Click to expand **Staff Profiles > Case Management Profile > Assessments**. The Assessments tab displays links to any existing assessments for the individual tab.

[Basic Skills Assessment](#)

Select this option to enter or edit basic skills assessment entries for this Individual.

[Aptitudes](#)

Select this option to edit Aptitude Assessment entries for this individual.

[Other Assessments](#)

Select this option to enter or edit other assessment entries for this Individual.

Assessments Tab Categories

The links under the Assessments tab include:

- **Basic Skills Assessment** – Enter assessment results for several different assessment tools, such as TABE and CASAS.
- **Aptitudes** – Enter assessment results for GATB and others.
- **Other Assessments** – Enter other assessments that are not covered in the other three assessment categories, such as Myers-Briggs and typing tests.

SNAP E&T Attendance Ribbon

Training Objectives

After completing this module, you will be able to:



- Navigate to the Attendance Ribbon.
- Track allowable and countable attendance that counts toward reporting.
- Apply this information to ensure the timely management of required data entry and form management.

Tracking Attendance Hours for Countable Activities

When enrolling a SNAP E&T participant in a service or activity, you can identify it **as allowable and countable** toward the participation rate by flagging it as **Counts Toward Reporting**. You'll then enter the minimum hours (this varies by state, depending on their program's eligibility rules) as the **Weekly Assigned Hours**. Then, on the Schedule tab of the enrollment wizard, you enter the scheduled days and times of the week for the countable activity.

After enrolling the individual, use the Attendance Tracking form to enter actual hours for the countable activity. There are no **lockdown dates** for entering hours after an activity is closed. You can continue to enter hours after closing an activity if it was open on the day for which you are entering hours.

To track Attendance Hours for a countable activity:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon**  to expand their SNAP E&T Program application ribbon.
3. Click the **plus sign icon**  to expand the Attendance ribbon.
4. Click the **Attendance Tracker** link. The Attendance Tracking page displays.
5. In the Participation Period section, select a **Year** and/or **Month** from the drop-down lists or use the default current month and year. A table displays, listing all attendance tracking activities the individual was enrolled in within that time frame (see figure below).

Participation Period

*Year:

*Month:

*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	10/5/2023	10/5/2023	10/6/2023	6:00	N/A	3:00	3:00
						Total Combined Hours	3:00

*Actual Hour Entry Type:

List of Services Table with Countable Hours for Selected Month and Year

6. **Actual Hour Entry Type** should be automatically selected from the drop-down list. Only one option exists:

- **Daily Only** – Allows you to enter hours on a daily basis. This is also the default behavior if the setting is left at **None Selected**.
7. Once you make an hour entry type selection and select an activity to enter time for, you cannot change the Actual Hour Entry Type selection for the rest of the month.
 8. After selecting an Actual Hour Entry Type, click the link for the desired Activity/Provider. A calendar entry grid for tracking hours for the selected month/year displays below the activity list, and the selected activity is bolded.
 9. Enter the attendance hours and minutes in the format **hh:mm** (00:59 for actual minutes).
 10. If you selected an Actual Hour Entry Type of **Daily Only**, or **None Selected**, enter the hours of attendance for each day in the corresponding box for the type (ACH, HOL, or EXC). Click the **Save Attendance** button to save the entered hours. If there are no invalid entries, the page will refresh with updates to totals shown for each week in the Weekly Total column on the right, and for the month in the Monthly Total cell at the bottom.
 11. To display a printable statement of the tracked hours in PDF format, click the Print button. The form includes areas for client and staff signatures.

Note: For sites that have the Document Management module, you can save a copy of the signed form to the individual's Documents tab by following these simple steps:

Edit the form.

In the Individual Signature section, add staff and individual signatures as desired.

Click the Create PDF checkbox, and then click the Print button.

After closing the PDF viewer window, a PDF version of the form is added to the individual's Documents tab.

SNAP E&T Good Cause Ribbon

Training Objectives

After completing this module, you will be able to:

- Navigate to the Good Cause Ribbon.
- Utilize this system feature to record a good cause for the individual to be temporarily excused from SNAP E&T program requirements.
- Enter supporting documentation.

The Good Cause Ribbon is designed to allow SNAP E&T Staff Members to document reasons for modified participation expectations. This ribbon is a documentation only ribbon and does not automatically change or update program participation for the individual.

To add a Good Cause Record for the SNAP E&T Program:

1. Select the **Create Good Cause** link from the **Good Cause** ribbon. The **Good Cause Wizard** displays (see figure below).

The screenshot displays the 'Good Cause Wizard Progress Page'. At the top, a horizontal progress bar shows three steps: 'Good Cause' (completed, marked with a checkmark), 'Response' (in progress, marked with an 'x'), and 'Notes' (not started, marked with an 'x'). Below the progress bar, there are three checkmarks corresponding to each step: 'Good Cause', 'Response', and 'Notes'. A 'Hide All Steps' link is located below the progress bar. The individual's name is 'Hernandez, Grace'. Below the name, there is a 'To Bottom' button. The application ID is '9944', the individual is 'Grace Hernandez', and the client ID is blank. The last edited on date is blank.

Application ID:	9944
Individual:	Grace Hernandez
Client ID:	
Last Edited On:	

Good Cause Wizard Progress Page

2. Click the **Action Type** drop down menu and select **Reconsideration**.
3. Select the applicable **Reconsideration Reason** from the drop-down menu.
4. Add the **Begin Date** (mm/dd/yyyy).
5. Enter the **End Date** (mm/dd/yyyy).
6. Enter **Comments** as appropriate.
7. Select the **Next** button.
8. The **Response** page appears.

Application ID:	9944
Individual:	Grace Hernandez
Response	
Rejection Reason:	
HHSC Good Cause Response:	
Date of Response:	

Response Page

9. Select the **Next** button.
10. Add a new case note if applicable.
11. Select the **Finish** button. The Good Cause ribbon displays the reconsideration reason table with the newly entered information.
12. Select **Return to Programs Tab**.

SNAP E&T Sanctions Ribbon

Training Objectives



After completing this module, you will be able to:

- Navigate to the Sanctions Ribbon.
- Submit a sanction recommendation to HHSC.
- Document Attachments.

If a participant falls out of compliance without good cause, SNAP E&T staff can request a sanction for non-compliance by completing the Sanction Referral form. This form communicates the details of the non-compliance event to HHSC staff who have been designated as recipients of the form in the Administration system. The agency then conducts the investigation, makes a disposition on the case, and forwards the outcome back through the system.

The sanction will support a conciliation process designed to give HHSC staff and the SNAP E&T participant the opportunity to put forth a good faith effort to settle disputes or misunderstandings related to services, before adverse actions are taken.

Create Sanction Referral for SNAP E&T program:

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 ribbon.
3. Click the **plus sign icon**  to expand the ribbon. Any existing sanctions display in a table (see figure 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

4. Click the **Create Sanction Referral** link. The Sanction Referral page displays (see figure below).

HHSC EDG Number:	
User ID:	30892
State ID:	11132
Case Manager:	Brandon Martin
Staff Phone Number:	
* LWIA/Region:	Capital Area WF Board
* Office Location:	123 WF SOL Capital Area East
Sanction Referral	
* Referral Reason:	4-Failed to participate
* Non-Cooperation / Cooperation Date:	09/13/2023  Today
Comments:	

Sanctions Referral Section of Sanctions Ribbon

5. Verify that the correct **LWDB/Region** and **Office Location** selections are accurate. If not, change them accordingly.
6. In the Sanction Referral section, select a **Referral Reason** from the drop-down list.
7. Enter the starting date of non-compliance in the **Non-Cooperation/ Cooperation Date** field.
8. Select the **Save** button. The sanctions table appears with the sanction information (see image below).

[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
04/02/2024	Cekan , Chris (30391)		Failed to participate	04/02/2024	Pending HHSC submission						0	Edit

Sanctions Table

SNAP E&T Add Employment Ribbon

Training Objectives

After completing this module, you will be able to:

- Navigate to the SNAP E&T Employment ribbon.
- Utilize this system feature to record employment details on behalf of the individual.

Note that Entered Employment is used for informational purposes only and is never used to meet federal reporting requirements.

To record new employment information:

1. Select the **Add Employment** link from the **Add Employment** ribbon. The **Add/Edit Employer** page displays (see figure below).

The screenshot shows the 'Add/Edit Employer' page. At the top, there are two links: 'Search Individual Employment History' and 'Select from Internal Job Order/Placement'. Below these are several input fields: 'Employer Name' (with a red asterisk), 'Verify Employer Name' (with links for Verify, Scan, Upload, and Link), 'Employer FEIN', 'State Tax ID' (with a red asterisk), 'Address Line 1', 'Address Line 2', 'City', and 'State/Province' (a dropdown menu currently showing 'None Selected').

Add/Edit Employer Page

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

- i. 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 select an employer and prefill the employment information.
 - a. Click either the **Search Individual Employment History** or **Select from Internal Job Order/Placement** link to display a pop-up window for employment records that were previously entered in the system for this individual.
 - b. Click the **Select** link in the Action column and click OK to confirm for the desired employment record. The information is filled in on the **Add/Edit Employer Page** for most fields in the **Employer Information** and some fields in the **Job information** section.
- ii. If the **Individual Employment History** or **Internal Job Order/Placement** information for the employer are not available, start the form by entering the **Employer Name**. The field will dynamically display matching employers who are registered in the system.
- iii. If the desired employer's name and address show, select it from the list. The **Employer Information** is filled in.
- iv. Continue to make entries in all required fields, and to check any fields that were auto filled. This includes the fields for employer benefits and other Yes or No questions

at the bottom of the Job Information section. These are not auto filled.

3. Select **Yes** to add to employment history.
4. Click the **Save** button. The **Add Employment** ribbon redisplay, with the added employment record listed in a table (as shown below).

The screenshot shows a web interface titled "Add Employment" with a page number "2" in the top right. Below the title is a link "Add Employment" and a search box. A table displays the following data:

Employer	Start/End Dates	City	Action
Burger King	06/01/2022 - 06/27/2023		Edit Delete

Employer List Table

Note: If the Add to Employment History radio button is selected, the information entered here will also carry over to the employment history section of the individual’s **Background Wizard**. Once an **Employer** record is saved, you can view, edit, and delete the record from the table.

SNAP E&T Credentials Ribbon

Training Objectives

After completing this module, you will be able to:

- Navigate to the SNAP E&T Credential ribbon.
- Utilize the SNAP E&T Credentials Ribbon feature to record any educational or occupational credentials a SNAP E&T participant attained while in the program, which is used for federal reporting requirements.

Add Credential for SNAP E&T program:

To add a Credential for the SNAP E&T Program:

1. Select the **Create Credential** link from the **Credentials** ribbon. The Track Credentials for SNAP E&T page displays.

Credential Information

* Credential Received:

Other Credential:

Credential Verification: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]
✓ Copy of Degree or Certificate

SNAP Credential Verification

School Records

Copy of Degree or Certificate

Case note documenting information obtained from training provider

Follow-up survey from participant

Other (Specify)

[Reset](#)

* Date Credential Received: (mm/dd/yyyy) [Today](#)

Associate to Training/Activity record: [[Search Activities/Services](#)]

Add Credential Screen

2. In the **General Information** section, select your **LWIA/Region** and **Office Location**.
3. In the **Credential Information** section, for **Credential Received** select the credential received.
4. For **Credential Verification**, select the **Verify** link to identify the document being used for Credential Verification. Click the **Verify** link again to hide the list.
5. Click the appropriate **Upload** link to attach an electronic copy of the document used for verification. A new window will appear where you can attach the document.
6. For **Document Description**, select **Certification** Forms.
7. For **Document Tags**, enter **Occupational Certificate**.
8. To attach the document, click the **Select File** button. A window will open where you can search for the document you want to attach.
9. Select the file from your computer and click the **Open** button.
10. Select the **Save** button.
11. Add the **Date Credential Received**.
12. 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

Credentials Activities List Table

- Click the **Save** button. The Programs tab redisplay, with the credential listed in the **Credentials** ribbon.

SNAP E&T Case Transfer Ribbon

Training Objectives


After completing this module, you will be able to:


- Navigate to the Case Transfer Ribbon.
- Perform a Case Transfer (with the necessary privileges).
- Process a request to transfer.

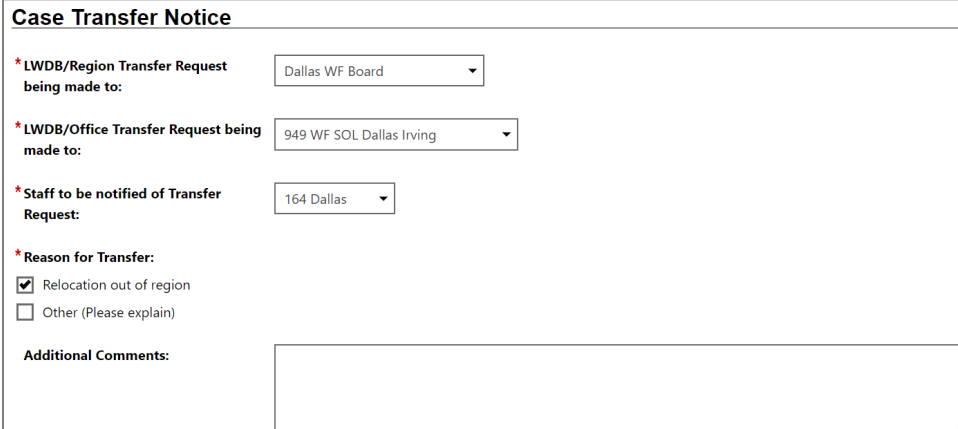
SNAP E&T participants must be actively engaged in the program, so if during participation, they move to a different service delivery region, staff with the necessary privileges will complete the Case Transfer form as soon as possible to avoid a break in participation. Case Transfer is a two-step process between staff in the requesting region and staff in the receiving region, and both will update the Case Transfer form.

Note: Staff cannot transfer a participant from one LWDB to another LWDB if they have open plans or activity enrollments; they must all be closed first. However, a participant can be transferred from one office to another in the same region even if they have open enrollments; they must acknowledge this in the message they receive.

Transfer a Case for SNAP E&T program:

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 panel.

3. Click the **plus sign icon**  to expand the Case Transfer ribbon.
4. Click the **Create Case Transfer Record** link. The Case Transfer form displays (see figure below).



Case Transfer Notice

* LWDB/Region Transfer Request being made to: Dallas WF Board

* LWDB/Office Transfer Request being made to: 949 WF SOL Dallas Irving

* Staff to be notified of Transfer Request: 164 Dallas

* Reason for Transfer:

Relocation out of region

Other (Please explain)

Additional Comments:

Case Transfer Form Page

5. In the Case Transfer Notice section, select the **LWDB/Region** and **LWDB/Office** you are requesting the participant transfer to.
6. Select the **Staff to be notified of Transfer Request**. They will receive an internal message in their Message Center that they will need to act on.
7. Check the box for **Reason for Transfer**. If **Other**, enter an explanation in the text box that displays.
8. If desired, enter any **Additional Comments** in the text box.
9. Click the **Save** button. The Case Transfer Notice is sent to the selected staff member in the receiving region and the Programs tab redisplay with the record added in the Case Transfer ribbon (see figure below).

Create Date	Create Staff	Transfer From	Transfer To	Last Edit Date	Edit Staff	Action
10/26/2023	Brandon Martin	Capital Area WF Board	Heart of Texas WF Board			Edit



Case Transfer Ribbon Displaying Transfer Record

The receiving staff member must edit the form and complete the Case Transfer Result section. See the rest of the procedure below.

Approving or Denying a Case Transfer

The receiving region staff member edits the Case Transfer form to complete transfer request.

To complete the Case Transfer form:

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 section.
3. Click the **plus sign icon**  to expand the Case Transfer ribbon.
4. Click the **Edit** link in the Action column (see figure below).

Create Date	Create Staff	Transfer From	Transfer To	Last Edit Date	Edit Staff	Action
10/26/2023	Brandon Martin	Capital Area WF Board	Heart of Texas WF Board			Edit

Case Transfer Ribbon with Edit Button Highlighted

The Case Transfer form displays with an added section (see figure below).

Case Transfer Result

• Transfer Accepted: Approved Denied

• New Case Assignment group: Northwest

• New Case Manager: Eileen

Additional Comments:

Application Information

Create Date: 04/26/21
Created By: GeoSol Staff
Last Edit Date:
Last Edit By:

Cancel Save Delete

Case Transfer Result

• Transfer Accepted: Approved Denied

• Reject Reason:

Activities Not Closed
 Address Not Updated/ Data Entry Error
 Mistaken Transfer
 Other

• If other, explain:

Additional Comments:

Application Information

Create Date: 04/26/21
Created By: GeoSol Staff
Last Edit Date:
Last Edit By:

Cancel Save Delete

Case Transfer Result with Approved and Denied Statuses Highlighted

- Specify if the **Transfer Accepted** is **Approved** or **Denied**. Depending on your response, different fields will display (see figure above).

- i. If **Approved**, select a New Case Assignment Group and New Case Manager.
 - ii. If **Denied**, check as many Reject Reason boxes as applicable. If **Other**, enter it in the box provided.
6. Enter any **Additional Comments**.
7. Click the **Save** button. The Programs tab redisplay, with the Last Edit Date and Edit Staff columns populated for the case transfer record you modified.

SNAP E&T Closure Ribbon

Training Objectives

After completing this module, you will be able to:

- Understand the steps involved in preparing a participant for soft exit.
- Understand how the exit process functions in the system.
- Successfully close all services in the service table in preparation for soft exit.
- Successfully close the IEP goals and objectives and all completion dates.
- Successfully complete the Closure Form and adding a new employer.
- Understand how to delete a Closure if additional services are necessary.

The Closure form indicates that all of a SNAP participant's planned services and activities have been completed (have a Last Activity Date and Completion Code) and the case is awaiting an actual exit from the program. It allows staff with the proper privileges to gather employment information and other data for SNAP performance reporting purposes. The Closure form can only be completed after all activities/services and Employment Plan (all goals and objectives) are closed. After case closure, only follow-up services may be added for a SNAP participant.

To Perform Closure of SNAP E&T program:

1. First close out all open services from the **Activities/Enrollments/Services** ribbon. All previously added services are displayed in a table. Open activities have an **O** icon in the **Status** column (see figure below).
2. To close a service, select the **Close** link in the **Actual End Date** column for the desired activity. The **Closure Information** tab displays (see figure below).

The screenshot shows a web interface titled "Activities / Enrollments / Services" with a search bar and a table of services. The table has columns for Status, Activity / Provider, Actions, Funding / Grant, Assigned Hours, Projected Begin Date, Actual Begin Date, Projected End Date, and Actual End Date. The first row is highlighted, and the "Close" link in the "Actual End Date" column is enclosed in a red box.

Status	Activity / Provider	Actions	Funding / Grant	Assigned Hours	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	S73 - SNAP E&T Appointment Activity No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S72 - Auto SNAP E&T Assessment No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S71 - Auto SNAP E&T Orientation No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close
	S70 - SNAP E&T Participation Notice Activity No Provider Information		SNAP E and T	N/A	N/A	11/01/2022	11/08/2022	Close

Services Provided Table

3. Enter the **Last Activity Date** (mm/dd/yyyy).
4. Select **Completion Code**.

5. If applicable, add a case note by selecting the **Add a new Case Note** link, complete the applicable fields, and click **Save** to return to previous page.
6. Click the **Finish** button. The Programs tab redisplay with the activity status closed (Status icon for the activity should now be orange) in the **Activities/Enrollments/Services** ribbon.

Closing the IEP

Closing IEP Objectives and Goals

To close Objectives or Goals for the assisted individual:

Note: Remember, you must work from the **bottom up** 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.

1. Open the plan by selecting the **Edit** link in the Action column. The Plan tab of the IEP displays.
2. Click the Objectives or Goals tab, as appropriate.
3. Click the desired **Edit** link.
4. In the Objective (or Goal) Information section, enter the **Actual Completion Date**, set the **Completion Status** to *Closed*, and then select the **Reason Closed** (**Successful** or **Unsuccessful**).
5. Add a comment, if desired, then click **Save**. The tab redisplay with the **Closed** status. Repeat as needed.

Closing the IEP for the Individual


Before closing a plan, you must close all Objectives and Goals associated with the plan, working **from the bottom up**: Objectives first, then Goals, then the plan.

Note: Because the IEP is a shared commodity among all program staff, please follow agency policy when closing the plan.

To close an IEP for the assisted individual:

1. Click the **Edit** link in the Action column. The Plan tab of the IEP displays.
2. Ensure all Objectives and Goals are already closed by visiting those tabs.
3. On the Plan tab, in the Plan Information section, enter the date the plan closed on in the **Plan closed on** field.
4. Click **Next** to move through the remaining tabs.
5. Click **Finish** on the Services tab. The Plan tab of the Case Management Profile redisplay with the plan status showing as **CLOSED**.

Creating a Closure Record

1. Click the **plus sign icon**  to expand the Closure ribbon.
2. Click the **Create Closure** link. If all activities are properly closed, the General Info tab of the SNAP E&T Closure form displays.

LWIA: 16 Pasco-Hernando Jobs & Education Partnership Regional Board Inc

*** Office Location:** CareerSource Pasco Hernando -4410- New Port Richey ▾

Case closure date: 11/01/2022

*** Case Closure Reason:** Employed ▾

Employment Information

*** Entered Employment:** Yes No

No employers available.

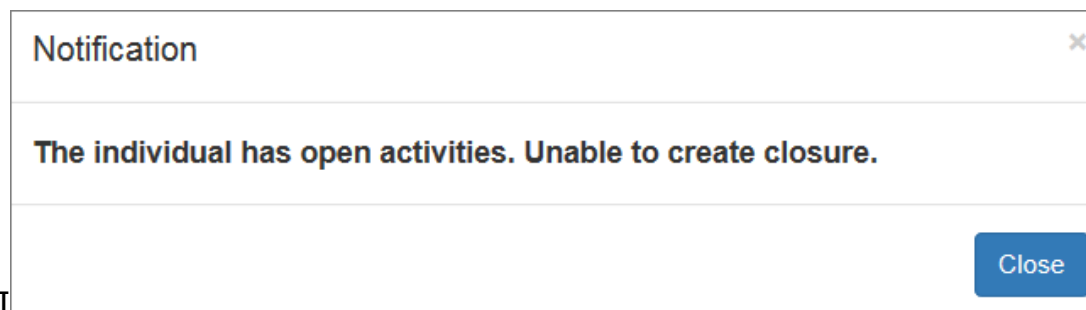
[\[Add Employer \]](#)

Staff Information

[\[Add a new Case Note \(Opens in a new window\) \]](#) | [Show Filter Criteria](#)]

Closure Form

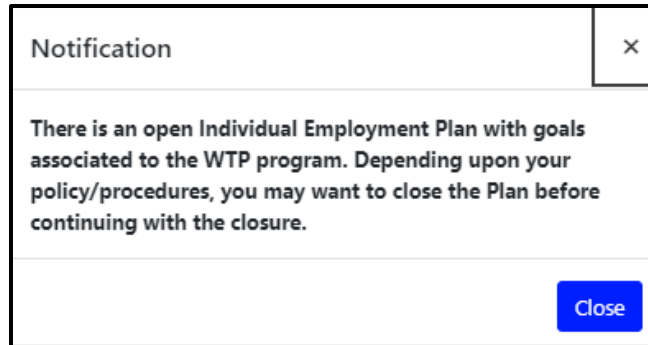
Note: If there are any open activities or Employment Plan goals/objectives, a warning message displays, and you must close them before you can continue (see figure below).



Unable to Create Closure Notification

Note: To continue, staff must click Close to clear the notification, and then make sure that all open activities have been closed.

Similarly, if the IEP, its goals, and/or its objectives remain open, the system will display the following notification window:



Open IEP Notification Window

Note: The read-only **Case closure date** is based on the latest Last Activity Date for a program service, or if unavailable, the Participation Date.

3. In the General Information section, select your **Office Location**, if necessary.
4. Select a **Case Closure Reason**.
5. In the Employment Information section, specify if the participant **Entered Employment** while active in the program.
 - i. If **No**, you can enter a case note or change case manager assignment in the Staff Information section, or simply skip to the final step to save the Closure form.
 - ii. If **Yes**, you must enter or select pre-existing employer/job data; continue with step 6.

6. To add employment, click the **Add Employer** link. The Add Employer page displays (see figure below).

Use this form to create or edit a new Employer.

Add/Edit Employer

[Search Individual Employment History](#) [Select from Internal Job Order/Placement](#)

* Employer Name:

Verify Employer Name: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Employer FEIN:

* State Tax ID:

Address Line 1:

Address Line 2:

City:

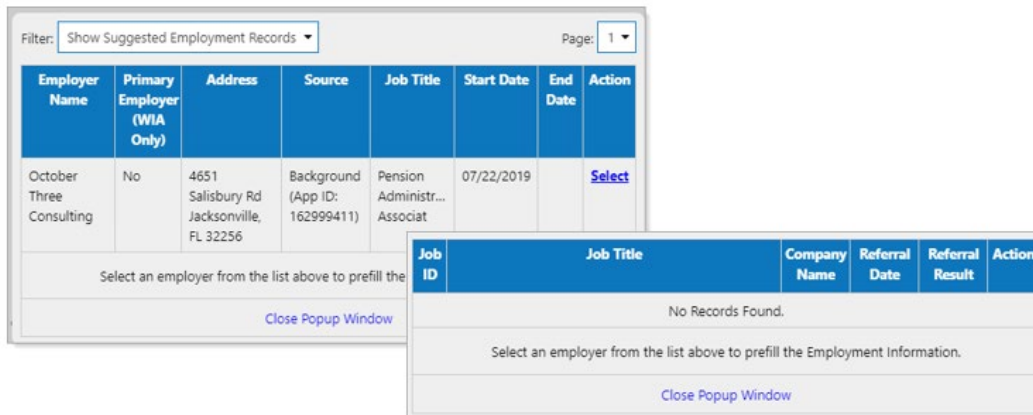
State/Province:

County/Borough/Parish:

Add Employer Page for Closure Form

- i. Enter the Employer Information and Job Information, taking note of the required fields marked with a red asterisk.
- ii. If any employment history or internal job placements were previously entered as part of the individual's Employment Plan or activities or application for a program, you can use the links at the top of the Add/Edit Employer section, **Search Individual Employment**

History or **Select from Internal Job Order/Placement** (see figure above), to prefill the employment information. Selecting either link will display a pop-up window where you can select an employment record (see figure below).



Search Individual Employment History and Select from Internal Job Order/Placement Pop-ups

- iii. Click the **Save** button. The Closure form redisplay, with the entered employment listed (as shown below).

Employment Information

*Entered Employment: Yes No

Employer Name	Primary Employer	Job Title	Start Date	End Date	Action
Starbucks	Yes	barista	02/01/2020		Edit Delete

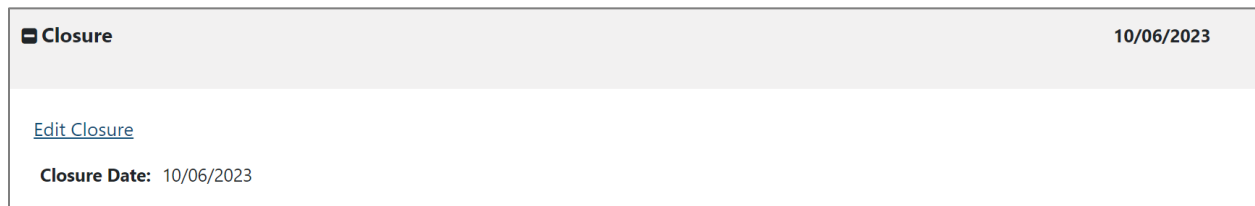
[\[Add Employer \]](#)

Closure Form with Entered Employment Information

- 7. To add a case note, click the **Add a new Case Note** link.

8. To make case assignment changes, click any of the links for **Assign Case Manager**, **Assign Me**, or **Remove Case Manager Assignment**.
9. 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.

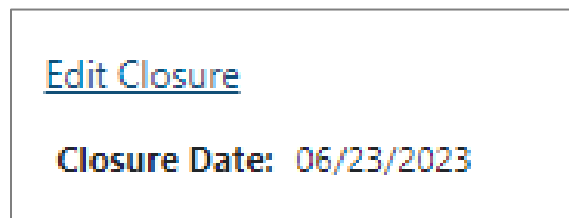
Note: Once a SNAP Case Closure form is created, a new program activity cannot be created for this enrollment period; only follow up services are permitted. If the customer must receive additional program services within this existing enrollment period, authorized staff must delete the SNAP Case Closure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



Closure Ribbon Example

Deleting a Case Closure

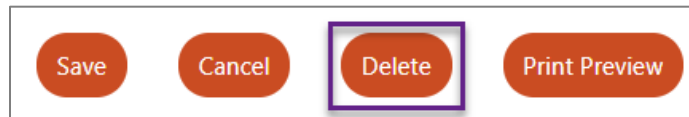
Upon successfully completing the SNAP E&T Case Closure form, the system displays the updated Closure ribbon, a sample of which follows:



Edit Closure Link

To delete this record, staff selects the **Edit Closure** link. The **Delete** button is only available to authorized staff once you have saved this form. By deleting the form, the individual may continue to receive SNAP E&T services for the current enrollment period.

To delete this record, staff selects the Delete button.



Delete Button at bottom of Closure Form

In response, the system will display a notification window to confirm your intention. To remove the message, click **OK**.

SNAP E&T Exit / Outcome Ribbon

Training Objectives

After completing this module, you will be able to:

- Understand the difference between **case closure** and **case exit/outcome**.
- Understand the global exclusion types that define an exit/outcome, and how a SNAP E&T case is identified when an exit form is completed.
- Understand the unique circumstances in which you can perform a manual exit.
- Successfully complete the Exit/Outcome Form.
- Understand how to delete an Exit/Outcome form if necessary.



According to USDOL guidelines, staff need only create a SNAP E&T Exit / Outcome (aka, hard exit) if the individual satisfies one of the established global exclusions. Otherwise, staff need not complete the Exit / Outcome form to initiate the individual's soft exit from the SNAP E&T program. The system will automatically exit the customer from the program as a soft exit when the individual has not received a program service for 90 consecutive days.

The WIT system is configured to execute the Combined Soft Exit procedure if the customer is co-enrolled in two (or more) federal programs simultaneously, including WP, WIOA, SNAP E&T, Choices, and TAA. This means the customer is an active program

participant until staff enters actual end dates for all program services.

To manually terminate the individual’s participation in the SNAP E&T program (i.e., create a hard exit), perform the following steps:

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:	<input type="text"/>
Alternate Contacts:	Add Alternate Contacts 

Exit / Outcome Form

2. Enter the **Exit** date (mm/dd/yyyy).
3. Select **Exit Reason** 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, and/or Choices.

Deleting SNAP E&T Outcomes

Upon successfully completing the **SNAP E&T Exit / Outcome** form, the system displays the updated ribbon, a sample of which follows:

[Edit Exit/Outcome](#)

Exit Date: 07/13/2023

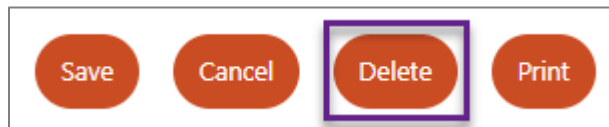
Exit Reason: Health/Medical

Edit Exit / Outcome Link

To delete this record, staff selects the **Edit Exit / Outcome** link. The **Delete** button is only available to authorized staff once the form has been saved. By deleting the form, the individual will return to their previous status, whether that was counting down towards the soft exit procedure or continuing to receive program services.

Note: If the customer was co-enrolled in any of these programs – TAA, Wagner-Peyser, SNAP E&T, and/or Choices – the system will also delete the exit / outcome form for the respective program(s).

To delete this record, staff selects the **Delete** button.



Delete Button at bottom of Exit / Outcome Form

In response, the system will display a notification window to confirm your intention. To remove the message, click **OK**.