TWIST Counselor Notes Subject Lines with Descriptions

**Instructions**

Find a subject line from the list that accurately describes the topic of your counselor note. If you’re not sure, read the description. Type the subject line you selected in the Subject Line field; then type your note. If you can’t find an appropriate subject line in the list, enter your own, but make sure it accurately describes the topic. **Do not use generic subject lines** that force the reader to open and read the note to determine the subject. For example: Discussion, Conference, Combo, Convo, Customer Called, Case Note, Counselor Note, Update, COM SER, Office Visit, Contact, Email Sent, Issue, Other and Miscellaneous – are too generic and not helpful to the reader.

The sole purpose of the descriptions is to define the Subject Line. **Do not use the descriptions to write or limit your note. Do not copy descriptions into the counselor note or use the descriptions as templates.** Write your own note as necessary – enter as much or as little information as required/appropriate.

Listed below are standard abbreviations you can use:

|  |  |  |  |
| --- | --- | --- | --- |
| Agr = Agreement | JSL = Job Search Log | Recv’d = Received | 2ndary = Secondary |
| App = Application | OJT = On-the-Job Training  | Redeter = Redetermine(d)  |  |
| CC = Child Care | Orien = Orientation | Ref = Referral  |  |
| Cert = Certification | POS = Point of Sale | Req = Request  |  |
| Cont = Continue | Prov = Provided | Sch = School |  |
| Dev = Development | Pymt = Payment | Supp = Support |  |
| Docs = Documents | Recert = Recertification  | Svc = Services |  |
| Empl = Employment | Recon = Reconsideration | VOH = Verification of Hours |  |
| FA = WS Financial Aid  | Recoup = Recoupment | YO = Year-old |  |

Some notes may contain multiple topics due to the nature of the customer interaction. If you can’t fit all of the combined topics in the Subject Line (EX: Job Search/Supp Svcs), always consider the reader’s perspective. You can:

* Use standard abbreviations to shorten the topics enough to fit in the Subject Line field.
* Create a separate note if the topics on the Subject Line aren’t clear.

**Typically Entered into TWIST Counselor Notes by Career Office and/or Call Center Staff**

 **Subject Line Description of What Note is About**

Attempt to Contact Documents you attempted but were unable to reach customer, contact info used, and reason for contact.

Award Letter Signed A summary of the conversation that occurs when the customer receives the Award Letter and staff reviewed customer responsibilities and next steps with the customer.

Adjusted Absent Days Indicates the number of absent days used was adjusted and the reason for the adjustment.

Appeal Customer is appealing a Workforce Solutions or TWC decision/action.

Attendance & Progress Documents status of customer’s school attendance and progress toward goals.

Cancel Commitment Documents request made to change a commitment including reasons for cancellation.

Care Authorized WS financial aid for child care is authorized for income eligible customer.

Care Discontinued WS financial aid for child care is discontinued for income eligible customer.

Case Review Request was sent asking customer to submit proof of employment.

CC Interruption-Eligibility Returning required documentation prior to required Activity Interruption return date.

CC Interruption-Ineligible Returned required documentation after required Activity Interruption return date and/or determined not eligible and case closed.

CC Interruption-Return Customer has provided documents to end Activity Interruption

CC Interruption-Start Entering a new Activity Interruption.

CC Closure/Non-parent Req Notice to close service NOT requested by parent.

CC Referral Provided WS financial aid for child care was authorized for a customer tagged as TANF or SNAP.

CC Referral Discontinued WS financial aid for child care was discontinued due to non-participation in required activities or ineligibility.

CC Referral Fix Request submitted to FAPO to correct, add, or delete information from a child care financial aid referral

CC Ref Updated/Cont Aid Update to child care previously authorized.

CC 3-months Cont Care Customer has a permanent change in work/and or training

CC Type Care Change Change in days and referral type.

Certification [enter date] Date the case is certified for customers tagged as TANF/Choices.

Change Change in customer contact information, such as address, phone number, alternate contacts, email, etc.

Check Notification Customer has been notified check is ready to be picked up at the Career Office

Check Pick-Up Customer picked up the check at the Career Office.

Check Stub (enter dates) When customer turns in participation hours in the form of a check stub or paycheck.

Commitment Cancelled Reports the commitment entered by unit has been cancelled.

Commitment Changed Status of change to a commitment.

**Subject Line Description of What Note is About**

Comprehensive Assessment First assessment after eligibility is determined.

Cooperating Program Month Indicates month in which a sanctioned customer must cooperate to maintain TANF. Customer had sanction and completed required participation hours for that month.

Credential Update Confirms customer achieved credential, type of credential.

Customer email Inquiry When parent is being assisted through email.

Data Integrity Request to correct, add, or delete information from a record no longer under edit privileges.

Documents Missing Lists the documents missing with a specific due date.

Eligibility Update Changes to household size, income, and/or work/training hours.

Eligibility States all funding stream(s) for which the customer is eligible.

Eligibility/H3 Homeless care authorized and activity interruption entered for three months.

Eligibility/H12 Homeless care authorized for 12 months.

FA App Received-Complete Customer provided all necessary documents for processing WS financial aid application.

FA App Received-Incomplete Customer has not provided all necessary documents for processing WS financial aid application.

FA App Submitted Financial aid application was submitted to call center by [enter method (scan, fax, etc.)].

FA Inquiry Documents a discussion with customers inquiring about WS financial aid prior to Initial Assessment.

 Topics might include what advice was given, information about high skill/high growth jobs, ideas for

 Exploring careers, finding alternate resources, budgeting, next steps, etc.

Fee Reduction Documents the reduced amount of parent share of cost and why the amount was reduced.

File Closed Record is closed because customer is no longer receiving services.

FLSA- Month of {enter month} Documents the calculation used to determine hours of participation monthly in volunteer activities.

Follow up: [enter topic] Use when providing follow-up services for customers tagged as WIOA with closed records.

Form 1822 Customer submitted an 1822 and must job search for 80 hours.

Good Cause {enter month} Documents the customer received Good Cause and the reason.

Income Now Orientation             Provided services to a customer referred by or referred to The Way Home Coordinated Access shelter hub

 facilities.

Ineligible {enter ineligibility date} Indicates ineligibility date and explanation when customer is deemed ineligible for services

Initial Assessment Detailed description of what the customer wants and needs**.**

Job Search Log {enter dates} Indicates the Job Search Log was submitted by a customer and the dates the log covers.

Job Search Progress Documents the progress of a customer’s job search activities and referrals.

Limit: Transportation SS Customer reached limit for transportation support service in 12-month period.

Limit: Work-related SS Customer reached limit for work-related support service in 12-month period.

Limit: Fees SS Customer reached limit for support service to pay for fees in 12-month period.

 **Subject Line Description of What Note is About**

Limit: Tools SS Customer reached limit for support service to pay for tools in 12-month period.

Limit: Scholarship Customer reached limit for scholarship financial aid.

Make-up Hours Agreement Documents an agreement for customers to make up cooperation hours.

Merge Request Merge request was sent to workforcesecurity@wrksolutions.com.

Missing Documentation Requested documents not provided by customer.

NCP Non-Compliance Sent letter notifying customer of missed appointment and providing a new appointment date.

NCP Missed Appointment Customer doesn’t appear for last reschedule non-compliance appointment; documented “no show.”

NCP Removal Request Emailed OAG contact to request customer be removed from NCP Choices for non-compliance.

NCP OAG Response Documents OAG contact response to Removal Request.

NCP Monthly Empl Outcome Customer made monthly employment outcome contact.

NCP Compliance Hearing Customer attended required compliance hearings at family court to discuss Choices compliance status.

New Voucher Needed Customer needs a new voucher for the next term.

Next Step Assessment Describes discussion with customers about next step requirement to participate in volunteer activities, such as community service, Workfare, Work Experience, etc.

Next Step Update Explains the status of customer progress in volunteer activities.

Obtained Employment Documents customer’s obtained employment and communication to HHSC via 2583 or 1817.

OJT – Job Search Map/Story Entered Job Search Map on a qualified and interested OJT customer based on assessment.

OJT – Referral Used to indicate the customer has been determined OJT eligible by CSC, the resume has been forwarded to the BC, and customer has been referred to [enter employer name and job posting number].

OJT – Training Plan Narrative Narrative of training plan entered on 1st day of work after determining number of hours needed to obtain sufficient experience to efficiently perform work duties.

OJT – Modification Modified original training plan.

OJT – Progress Report Documents current status of training.

OJT – Exit Notes                                 Final Progress report and reminder of available services.

Parent Agreement Sent Eligibility has been determined and Parent Agreement has been emailed to customer.

Paycheck {enter dates} When customer turns in participation hours in the form of a paycheck or check stub.

Penalty Requested Penalty requested for failure to respond to outreach or failure to participate as required.

Penalty Discussion Documents a discussion with customer about why a penalty won’t be rescinded.

Post-TABE Documents a TABE discussion with customer, scheduling of post-TABE, review of results, and next steps.

Reassessment of Services Documents monthly reassessment of services.

Received Missing Docs Lists documents submitted by customer.

**Subject Line Description of What Note is About**

Reconsideration Sent a request to HHSC, via 2583 or 1817, to reconsider customer’s work code.

FAPO Fact-Finding Documents the customer is receiving financial aid for child care while ineligible and explains why.

Rescind Penalty Request Discovered customer had a good reason for failure to participate; sent req to rescind initiated penalty.

Return Letter Received A letter we sent was returned to us undelivered.

Scholarship Registry Placed customer name on registry for financial aid for scholarship.

Service Plan Update Service plan was updated to adjust action steps/goals/timelines, etc.

Support Svcs Requested Documentation indicating customer requested certain support service(s), options, and results.

Suspension Indicates the customer’s financial aid was temporarily suspended and explains why.

Svcs Prov: Alt 2ndary School Enrollment in a nontraditional alternative secondary school to complete high school or GED.

Svcs Prov: Basic Ed Skills Training in an Institutionalized setting designed to enhance employability by upgrading basic skills.

Svcs Prov: Close Description of service and reason it needs to be closed.

Svcs Prov: High School Service tracking high school attendance for WIOA youth.

Svcs Prov: Job Readiness Service to improve work readiness skills including presentations, resume-writing, interview tips, etc.

Svcs Prov: Job Search One-day service assisting customer with information and/or help finding employment.

Svcs Prov: Leadership Dev Service to encourage positive social behavior – may include community service, peer-centered services, and other positive behaviors outside of school.

Svcs Prov: Mentoring Service that includes a relationship with an adult to help with personal development, academic and career assistance such as job coaching, advising, and consultation.

Svcs Prov: Short Term Ed Short-term (6 months or less) education to prepare for employment, e.g. Literacy, ABE – includes giving material to increase literacy.

Svcs Prov: Tutoring Communication of knowledge, ideas, dropout prevention, etc. to help Youth complete secondary school.

TABE Confirmation customer completed the TABE assessment.

Testing Assessment Describes the type of assessment provided and why; may include scores.

Training Not Started Customer didn’t begin training as planned; starts at a later time or commitment is no longer needed.

**Subject Line Description of What Note is About**

Training Start & Status Customer began training as planned and provided enrollment status information as follows [*use template below*]:

Name of School:

Start Date:

Campus:

Address:

Phone #:

Type of Degree:

Total number of Credit/modules:

Expected Completion Date:

Course Load:

Transfer Record Transferred customer record to a different staff person and/or location.

Transitional Child Care Indicates a discussion about transitional child care.

Transportation Calc. Documents the calculation used to determine monthly transportation amount provided.

Updated Cost Obligation Resubmitted cost obligation with updated amounts, date, course, etc.

Verification of Hours [dates] Use when documenting progress of a customer’s activities with included dates.

Void Attendance Letter Indicates a 50%, 75%, or 100% Attendance letter was printed, but not mailed, and explains why.

Voucher Cancellation Cancelled voucher because customer is no longer in need of it.

Voucher Pick up Customer needs to pick up voucher at career office or customer picked up voucher at CO.

Waitlist Use when you place a customer’s name on the waitlist for financial aid for child care.

Withdrawal-CC Notification from parent that child care service is no longer needed.

Work Orien/Job Search Map Conducted a work orientation and completed a Job Search Map for TANF and SNAP applicant.

Work Orien/Conditional Conducted a work orientation for a customer tagged as a Conditional (TANF) applicant.

Work Orientation/2P Conducted a work orientation for a 2-parent family.

Youth Challenge Documents the youth challenge for eligibility purposes.

15-Day CC Closure Letter Sent customer letter stating she has 15 days to make other child care arrangements

36-Day CC Recert Letter Sent customer letter informing her there are 36 days before recertification is needed.

50% Attendance Letter 15 absences used.

75% Attendance Letter 22 absences used.

100% Attendance Letter 30 absences used; child care financial aid discontinued.

**Typically Entered into TWIST Counselor Notes by Financial Aid Payment Office Staff**

**Subject Line Description of What Note is About**

CCAA Card Parent requested new CCAA attendance card.

Child Care Inquiry Customer contacted FAPO with a child care-related inquiry.

Facility Closure Facility closed or closing; parent has 15 days to find provider.

New CCAA Card Mailed Mailed a new CCAA card to the customer.

Parent Withdrawal Provider informed FAPO parent no longer needs child care.

Recoup-Allow w/Pymt Agr Fact finding complete, parent in recoup, needs to submit Pymt Agr before eligibility is re-determined.

Recoup-Do Not Allow Fact finding complete; parent is in recoupment and must pay balance in full before eligible for child care financial aid. Note: Include the balance amount due in the note.

Recoup-Pymt Agr Recv’d Parent has agreed to replay amount due to WS and can have his/her eligibility re-determined.

Recoup Pymt Late Note Customer’s recoupment payment is late.

Recoup-No Violation Fact finding complete; no evidence to support violation of WS policies. Re-determine eligibility.

Transfer Provider Parent changed child care providers.

TWC Review Findings of the review forwarded to TWC Office of Investigation (OI) in Austin. Child care financial aid denied until further notice.

Vendor Refunded $$ Documents a vendor refunded all or part of monies received from FAPO; indicates the type of fund credited (school, work-related, etc.) to reset the balance in that financial aid category.

Vendor Enrollment Enrollment and data entry has been completed for a Regulated or Unregulated Vendor

Vendor Maintenance Update action taken on existing Vendor (Holiday Schedules, 2404’s, Direct Deposit, etc.)

1st Recoup Notice Notice mailed to customer that recoupment plan has been developed and awaiting her response.

2nd Recoup Notice Second notice mailed to customer awaiting his/her response to recoupment plan.

**Entered Into Provider Comments Section in TWIST by Financial Aid Payment Office Staff**

**Subject Line Description of What Note is About**

Annual Review Complete The vendor’s annual review has been completed.

Adverse Action FAPO received notice from state agency-children removed, intake closed.

Agreement Renewal Provider has renewed agreement (TRS-annual, all others every 3 yrs).

Change of Address Vendor reported a new address (new agreement required).

Change of Contact Info Vendor reported a change in phone, email, mailing address.

Child Care Inquiry The customer contacted FAPO with a child care-related inquiry.

Close Intake Vendor has not returned signed agreement.

Collection of Attend. Card Parent gave possession of card to vendor.

Collection of POS Indicates staff collected Point of Sale machine from a vendor and explains why.

Corrective Action Recv’d notice from state agency (probationary status) children remain, new enrollment closed.

Emergency Closure Facility is not in operation due to inclement weather, fire, flood, etc.

FC-Forms Not Returned The vendor representative failed to return requested documents (list documents).

FC-Ineligible The facility is not eligible to operate.

FC-License-EIN Change This vendor was closed due to a change.

FC-No Longer Operating Facility no longer in operation.

FC-Owner Changed The vendor owner is no longer operating the facility.

FC-Per DFPS This vendor was identified as ineligible to operate per a report from the Texas Department of Family and

 Protective Services.

FC-Withdrawal Vendor no longer wants to be in the Workforce Solutions Network.

Holidays Request Vendor’s holiday requests have been received and entered in TWIST.

IRS Levy FAPO received IRS levy-vendor payments withheld.

Payment Dispute Situation is escalating.

POS Machine Malfunction Vendor reported problems with POS machine.

Rate Increase Provider submitted new rates, state board increased rates.

Recoupment Vendor owes WS & funds could not be recouped through TWIST.

Refusal of Service Vendor refuses to provide care, parent allowed to transfer.

Svc Improvement Agr (SIA) Vendor is in possession of attendance card.

TWC Freeze FAPO received TWC freeze-vendor payments withheld.

Vendor Forms Received Forms have been received from the vendor.