

## ADDING A CUSTOMER TO TWIST RIO FUND\*

### Desk Aid

1. Click on <b>Customer Information Icon</b> .	
2. Enter <b>Social Security Number</b> .	If "No Customer with the Name/SSN" appears, verify the SSN. If correct, enter customer in WIT. Return to TWIST, repeat step 2.
3. At the <b>Identity</b> tab, verify information populated from WIT: Birth Date; Mailing Address (enter "Same" in the Residence field if it's the same as the mailing address, or enter the correct address); Phone Number; County Code; City Code.	Save
4. Click on <b>Characteristics</b> tab. Ensure the <b>Specialized Services</b> radio button is checked.	
5. Verify <b>Gender, Citizenship, and Ethnicity</b> . If male and born on or after January 1, 1960, click <b>Selective Service</b> box and enter number.	Verify selective service registration at <a href="http://www.sss.gov">www.sss.gov</a> Save
6. Click on <b>Education</b> tab. Enter <b>Highest Grade</b> completed.	Save
7. Click on <b>Employment Status</b> tab. If the customer is employed, check the <b>Employed at Application</b> box.	Save
8. Click on <b>Program Detail</b> under <b>Menu Selection</b> .	Move the cursor to the gray area on the right of the screen. Right click the mouse and select <b>Add</b> to add a record. If RIO information is already present, verify and go to step 12.
<p>9. Enter:</p> <p><b>Program Type:</b> 12-RIO</p> <p><b>Referral Date:</b> The date the customer's parole officer referred him to RIO or the date of the letter accompanying the RIO documents package.</p> <p><b>TDCJ No:</b> The TDCJ number if the customer is a RIO adult (referral or letter accompanying the RIO documents package).</p> <p><b>TYC No:</b> The TYC number if the customer is a RIO youth referral or letter accompanying the RIO documents package).</p> <p><b>Office 3, 4 &amp; Staff</b> (if information is not defaulted from staff profile or it's incorrect).</p>	<p>Click OK</p> <p>Save</p> <p><b>Note: You now have a RIO Program Detail</b></p>

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10. Click on the “+” sign on the left side of <b>Program Detail</b> .	
11. Click on the <b>RIO Program Detail</b> with the red checkmark.	If you only need to update the receipt of documents proceed to Step 14.
12. Type in the date the customer came into the office requesting RIO services. <b>Referral Date:</b> The date the customer’s parole officer referred him to RIO. <b>Orient Date:</b> The date the customer attended a RIO orientation.	Click OK Save If the customer is present, enter a service.
13. Click on the <b>Release Information</b> tab.	
14. Complete the following fields: <b>TDCJ No:</b> Type in the TDCJ number if the customer is a RIO adult. (Information found in customer document package- Doc Pkg) <b>TDCJ Region:</b> Select the TDCJ region. (Doc Pkg) <b>TDCJ District:</b> Select the TDCJ district. (Doc Pkg) <b>TYC No:</b> Type in the TYC number if the customer is a RIO youth. (Doc Pkg) <b>TYC Area:</b> Select the TYC area. (Doc Pkg) <b>TYC District:</b> Select the TYC district. (Doc Pkg) <b>Docs Received Dt:</b> The date the documents were received. <b>Document Desc:</b> Type in a brief description of the documents received. <b>Current Offense:</b> Type in a brief description of the current offense (refer to E-37, electronic or paper). <b>Prior Offense:</b> Type in a brief description of the prior offense (refer to E-37, electronic or paper ) <b>Release Date:</b> Type in the release date (refer to E-37, electronic or paper ) <b>Sentence Discharge/Parole Completion Date:</b> Type in the sentence discharge or parole completion date (refer to E-37, electronic or paper) <b>Parole Office No:</b> Type in the parole officer’s identification number (refer to E-37, electronic or paper) <b>Parole Officer Last Name:</b> Type in the parole officer’s last name. (referral - E-37, electronic or paper) <b>Parole Officer First Name:</b> Type in the parole officer’s first name (refer to E-37, electronic or paper) <b>Docs Rec Office 3 and Office 4:</b> Select the Office where the documents are located.	Click OK Save

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15. Click on <b>Service Tracking</b>	
16. Right click the mouse to add the appropriate <b>service</b> for the customer, usually:  <b>Service Category:</b> 3 Job Search Services  <b>Service:</b> 12 Job Search Assistance/Job Search  <b>Start Date:</b>  <b>Planned End Date:</b>  <b>County and City:</b>	
17. Right click the mouse to add entry in lower portion of screen in the <b>Fund Detail</b> area: Fund - RIO	Click OK  Save

\* If the customer participated in the RIO program while incarcerated, there may be information in the TDCJ icon located on the TWIST toolbar. To view information in the TDCJ icon, enter the TDCJ number and the information will be displayed. The information located here may be different from what is received in the documents. When differences occur, verify with any documents received. This "read only" screen and can not be updated and is not linked to TWIST. Place the correct information in the screens identified above.