



Standard # --- Basic Services

## I. Standard

Good customer service begins by first listening to the customer describe what she wants and then providing information that helps her understand how Workforce Solutions can help meet her needs and expectations.

(Measured by the survey, monitoring)

Basic services are available to all resident customers. Workforce Solutions is committed to allowing each resident customer to work alone or with career office staff, and to access the basic services, whether it is information or direct services, she wants and needs in order to get a good job or keep a good job.

(Measured by the entered employments and direct placements)

## II. Background

Workforce Solutions provides services for residents that fall into three categories based on the level of resources required to provide those services-*basic services, expanded services and financial aid*. Every service provided by Workforce Solutions fits into one of these three categories-every service. The first level of services, *basic services*, does not require a great deal of staff assistance for each customer. We allow customers to access basic services and use available resources on a self-serve basis as often as they like. Customers have a choice on where, when and how they use basic services. All resident customers who ‘touch’ Workforce Solutions receive a basic service, therefore the total resources used to provide basic services may be significant but are spread over a large number of customers. In other words, the cost per customer to provide basic services is very low.

Basic services are informational in nature. For example, Workforce Solutions staff provide labor market information (LMI), a basic service, to any customer seeking a job who gives us information about her job skills and experience, and the type of work she desires. When we provide a customer with assistance and information on available jobs that match the customer’s skills, we are providing her with LMI, a basic service.

All career office staff are expected to provide good customer service including the basic informational services. Staff assisted basic services require office personnel to have good listening skills, complete knowledge of services available through Workforce Solutions and the ability to quickly assess how Workforce Solutions can meet each customer’s stated request or need. A critical step in providing quality basic services is telling each customer about the next step in the service process. Staff must never leave a customer wondering what will happen next.

The next step will not be the same for each customer as each person has a unique set of employment needs.

### **III. Description of Basic Services**

Basic services are available to any resident who wants or needs these services. They may be provided electronically or by staff. Basic services are designed to help residents get a job, keep a job, or get a better job. Basic Services are the following:

- **Job Openings/Listings**
- **Placement Services**
- **Employment and Career Information**
- **Computer Access**
  - ✓ Internet Job Search
  - ✓ Computerized job search software tutorials
  - ✓ E-mail
  - ✓ Resume Preparation
- **Job Search Assistance (referral to job openings, FAX, Telephone)**
- **Labor Market Information**
- **Information on support services for working families including information on available and affordable child care**
- **Job Search Seminars**
  - ✓ Resume tips
  - ✓ Interviewing tips

**Recruiting customers to offer Workforce Solutions job search assistance** - Workforce Solutions staff often contact customers required to use Workforce Solutions in order to get or maintain government benefits. We contact TANF applicants or recipients, some Food Stamp recipients, Unemployment Insurance recipients and some customers who may be eligible to receive TAA benefits. Special efforts are made to recruit youth who are about to graduate from high school and are beginning to make career decisions. Workforce Solutions makes special efforts to recruit youth in the foster children program by working with schools and government agencies. We contact other groups of customers as well. Initiating contact to offer Workforce Solutions services is a Basic Service.

**Work Application and Addendum** - Providing information and gathering information from the customer, on paper or electronically, is a basic service. Keeping the information current is also a basic service. The Work application or Addendum provides the most basic information about the work life of Workforce Solutions customer. The information is used to match the customer with job openings. It is also helpful in identifying customers who may

benefit from a series of services or financial aid from Workforce Solutions. All customers directed to Workforce Solutions for help in job search must be offered a work application.

#### IV. Key steps in the Service Process

The following principles apply to providing Basic Services to customers.

1. The customer, alone or with the help of Workforce Solutions staff, determines what services she wants and needs.
2. All staff must be able to provide basic services. Greeters, Resource Specialists, and Employment Counselors are primarily responsible for providing basic services to customers. Personal Services Representatives provide many of the basic information services to customers who are also receiving more intensive services. Financial Aid Specialists, Testing and Assessment Specialists, and Seminar Facilitators deliver basic services as well.
3. Management is responsible for assuring quality basic services are delivered to all customers. Managers may do this by closely supervising the service delivery process and by directly serving customers.
4. Each customer may choose from an array of Workforce Solutions services to help meet her individual employment goals. As customers move through our system, each step of the service process must build on the step before it with some **value added**. It is the responsibility of Workforce Solutions staff to assure the customer is always aware of her next step in the process.

#### Steps in the Service Process – Basic Services

1. **Greeting a customer as she enters the office** - A staff member **wearing Workforce Solutions nametag** will greet each customer by asking, “How may I help you?” The staff member acting as a “greeter” always listens to the customer’s request. All customers with specific requests will have those requests addressed before referral to, or suggestion of, another service. If a knowledgeable staff member is not immediately available to discuss or accommodate the customer’s request, any staff member must be able to provide alternatives.

*For example, Mary Smith enters the office and tells the greeter she would like Workforce Solutions to help pay her tuition to go to school. Ms. Smith should be immediately directed to a staff person who can explain Workforce Solutions requirements for providing financial aid including seeking non-Workforce Solutions sources of financial aid. Staff will help Ms. Smith determine whether to pursue her request for financial aid from Workforce Solutions by gathering more information about the customer’s financial status and job skills. Ms. Smith may discuss other avenues for financial aid with the Financial Aid Specialist or Ms. Smith may decide to attempt a work search using her*

*current skills. Once Ms. Smith makes this decision, Ms. Smith will be asked to complete any paper work necessary to begin her chosen service path. The next step is for the customer to speak to any one of the following staff persons:*

- Employment Counselor, Personal Services Representative, Financial Aid Specialist, Testing and Assessment Specialist, or the Resource Specialist. When Ms. Smith leaves our offices, she should understand the help she can expect from Workforce Solutions on her next visit and what, if any, information we will need from her (In other words, the customer must understand the next step).

The Greeter will listen carefully to what the customer says when the customer is unsure of the services offered at Workforce Solutions or which service will best address her needs. The Greeter will then make suggestions about how Workforce Solutions may be of help. The Greeter may suggest the customer would likely benefit by a conversation with an Employment Counselor. The customer may want to take information on Workforce Solutions home to read or she may choose to use the resource library. A conversation or appointment with a Financial Aid Specialist may address the customer's request. The Greeter is not expected to provide most of the services but she is expected to appropriately direct the customer to staff who can provide the service.

All customers must be offered the handout entitled "Workforce Solutions Services" and an office monthly activity calendar. A menu of services listing the same services as those on the handout must be posted in easy view of all customers entering the office. The printed material allows the customer to review, at her leisure, all the choices available to her.

**Note:** – *Section VII.A. Information Resources for Staff - Technical Assistance Guide*, in this standard, provides a technical assistance guide to the service process. It describes the staff person most likely to provide services requested by resident customers. The guide is intended to help all staff, but especially new personnel, work with customers correctly after greeting them.

2. ***Orientations.*** Some customers come to the office in response to a recruitment letter from Workforce Solutions inviting them to use our services. Some also come as the result of a referral from another organization directing them to Workforce Solutions. Many of these customers receive information about Workforce Solutions services in an orientation that addresses the customer's responsibilities. (See *Information Resources for Staff Section VII. H. Orientation Scripts* and *VII. I. Recruitment Letters*).

Board staff encourages Workforce Solutions offices to provide individual customer orientations whenever possible. A customer must be allowed to receive orientation information one-on-one from Workforce Solutions staff if she comes into the office during a time when a group orientation is not scheduled. Customers will never be asked to return on another day to receive information in a group.

All orientations emphasize how to make the most of career office resources/services to get a job, keep a job, or get a better job. The orientations may include the two-minute video/CD developed by Gilbreath entitled “Workers in SUPPLY Jobs in DEMAND”. The video/CD quickly introduces customers to Workforce Solutions services in an entertaining manner. It may not be effective when there is not a large screen for viewing and the group is large.

Some customers may have a referral form or letter from a government agency.

- ✓ The Texas Health and Human Services Commission (HHSC) requires TANF recipients and many Food Stamp recipients to look for work through Workforce Solutions in order to maintain benefits.
- ✓ Some Unemployment Insurance (UI) recipients are identified through the Profiling System as “likely to exhaust UI benefits before finding work”. These customers may be required to contact Workforce Solutions for work search assistance in order to continue receiving UI benefits.
- ✓ Some ex-offenders are referred to Workforce Solutions through the Criminal Justice system.
- ✓ Customers notified that they may be able to receive benefits under TAA are directed to Workforce Solutions for more information about those benefits.

The content of the recruitment letters sent by Workforce Solutions and the orientations provided to customers responding to these letters is included in this Standard under Section VII.H and VII.I. Information Resources for Staff – Orientation Scripts and Recruitment Letters. All orientations and recruitment letters must follow the appropriate samples in this Standard. Staff may not change the content of the recruitment letters or the orientation.

As with all customers, people who come to Workforce Solutions in response to a recruitment letter or referral from a government agency will have their specific request for service addressed before staff begins to recommend additional or alternate services. Customers attend a group or individual orientation that informs the customer of Workforce Solutions services. The orientation also details the customer’s responsibility in looking for work, or working, in order to obtain or maintain a government benefit. A brochure titled “Work Orientation” is given to the customer to take home. Each customer speaks to an Employment Counselor about her individual job search. Necessary HHSC forms are stamped for customers applying for TANF benefits. Information indicating that the customer responded to the profiling letter is data entered into WorkInTexas.com. TAA forms are completed. Information is data entered into TWIST if customers are directed to Workforce Solutions to fulfill a requirement of HHSC; TWIST records will be created when ex-offenders are directed to Workforce Solutions from the Criminal Justice System.

After customers view the orientation video/CD, staff will provide a short explanation of Workforce Solutions services and customer responsibilities for receiving various government benefits.

- No orientation will exceed 30 minutes in length.
- Individual orientations are preferable. Offices that schedule group orientation must offer them daily at the same time each day.
- Workforce Solutions will not require customers to remain in a group for additional services following the orientation. A customer will be asked to speak individually to an Employment Counselor about her job search as part of the orientation. This interview must take place very quickly after the group orientation to avoid long customer waits. Customers will be offered the opportunity to use office resources or complete work applications during the short wait to see Workforce Solutions staff member.
- An Employment Counselor will interview each customer at the conclusion of a group orientation to quickly assess whether she is ready to look for work and to work. The Employment Counselor will proceed to help with completion of the work application and addendum if necessary. If the customer is work ready, the Counselor will provide job referrals, give interviewing tips or career advice, and suggest the next step in receiving helpful services from Workforce Solutions or others. If the customer is not ready to work or look for work, the Employment Counselor will refer her to another specialist on the staff, usually a Personal Service Representative or Financial Aid Specialist. The customer will not have fulfilled a requirement to look for work with Workforce Solutions until she has spoken to an Employment Counselor and knows the next step for her.
- No customer will be required to attend a group orientation more than once in a twelve-month period.
- A customer referred by HHSC more than once in 12 months will be seen by a staff member who provides the customer the brochure “Work Orientation” used in all orientations. The staff member asks the customer to sign the Employment Plan portion of the brochure again. The staff member must discuss the customer’s current work preferences and update information relevant to the work search. If the customer is work ready, staff will provide help with her job search during the visit. Staff explain to the customer the next step in working with Workforce Solutions, agree on a day the customer will return to the office, and stamp the HHSC form. The customer will not be required to attend another group or scripted orientation.
- A customer referred by HHSC who is under penalty or is a conditional TANF applicant will be asked to work with a Personal Service Representative. The PSR will be responsible for organizing the customer’s work search or other work activities.

- Group orientations are appropriate for customers who require information about the customer responsibilities necessary to maintain benefits provided outside of Workforce Solutions. Orientations introducing Workforce Solutions services to customers who have no responsibility to allow Workforce Solutions to help them should not regularly be provided in a group. Customers may be offered an orientation in a group setting when a group orientation benefits the customer. However, customers should never be required to attend a group orientation before they can receive services. Any customer who prefers to receive information about Workforce Solutions services from a staff member must be given that information at the time that it is requested.
3. **First Assessment - Job Skills and Employment Goals; The Work Application.** – The work application lists a customer’s work skills, work experience, salary history, educational history and work goals. Most customers will benefit from having a work application in WorkInTexas.com because the application will match to suitable jobs in the database. The application also allows Workforce Solutions to contact the customer about current and future job opportunities and to help staff identify when a customer may need other helpful services. The work application must be available for data entry into WorkInTexas.com before screening and directing a candidate to an employer with a job posting in Workforce Solutions database. The work application **must** be updated when the customer’s information or work requirements change.

**Note:** All customers who complete a work application are included in the Employment Service performance measures.

Employment Counselors and other staff members interviewing customers for work should always follow the three steps listed below

- Listen to what the customer tells us she wants and needs to get a job, keep a job or get a better job
- Provide professional advice when it is helpful and desired by the customer, and
- Help the customer get the services that she and the staff member have agreed will move her toward her employment goals

Some customers know exactly what they want in a job and what they need to land the job. Others need more help in making those decisions. Youth may particularly benefit from more probing questions and staff suggestions to determine the kind of career they want. They are likely to need more preparation before they are ready to enter the chosen career.

4. **Completing the Paper Work Application or Addendum** - The paper Work Application contains all of the information for entry into WorkInTexas.com as well as the information found on the Work Application Addendum. The addendum is used to collect the additional information when the work application is submitted electronically into WorkInTexas.com. (See VII. C or D Information Resources for Staff, *Work Application Addendum English/Spanish*)

Almost every customer is eligible to be tagged as a WIA-Adult or Dislocated Worker, and a signed paper application or addendum is the only document needed for our records. The signed documents allow customer services to be underwritten by funds from the Workforce Investment Act. Basic and Expanded Services may also be underwritten by Wagner-Peyser. TANF, FSE&T, and RIO funds may be used to pay for these services for some customers. Each Career Office contractor will use a cost allocation plan to determine the amount of each funding stream used to pay for basic and expanded services. The funding source that pays for staff time and materials to provide these services is an internal matter not to be discussed with the customer, **ever**. A more detailed explanation of how to use the Paper Application or Addendum as proof of eligibility is in this Standard, VI. E. *Information Resources for Staff, Use of the Paper Work Application or Work Application Addendum*.

5. **Second Assessment - Exploring the Work Search Process; The Work Search Assessment Desk Aid** (see VII. F. *Information Resources for Staff, Work Search Assessment Desk Aid*) Workforce Solutions staff who provide assistance to resident customers must determine what kind of work search the customer has under way. The Work Search Assessment Desk Aid is intended to help guide a staff person's conversation with a customer to determine whether the customer has begun a job search, how the customer is looking for work and whether the search is showing positive results. This information, in conjunction with the work application and addendum, is used to help the staff and the customer determine which of Workforce Solutions services are most likely to result in a successful search.

The desk aid must be used as a guide for discussions about work search techniques for all customers. The desk aid is not to be used as a form to be completed by the customer. It may be transmitted electronically and reproduced. It may be found on Workforce Solutions web site at: <http://theworksource.org> attached to this Standard.

Any time staff provide individual work search services to a customer, they must also give the customer good feedback on her job search. Staff should discuss with the customer her progress, and problems related to her job search and any feed back she has received from employers.

6. **The Next Step in the Service Process for Each Customer** – From the preceding steps, staff can make a determination about which services best suit each resident customer's work search needs and desire for help. (The next step)

The information gathered may lead to additional basic services, expanded services, or the need to apply for financial aid. The process of gathering information about each customer's progress toward a successful work search is ongoing. The customer may ask for more

intensive services as problems in finding work become more apparent. Workforce Solutions staff may suggest additional services would be helpful.

When the Employment Counselor determines that a customer is ready to work but the most useful service to help the customer land a job is an expanded services, the Counselor should consider whether a continuing series of expanded services is likely to benefit the customer. An example of a customer likely to benefit from a series of expanded services follows: *The Counselor has suggested a customer change her career path because her previous work is no longer in demand. Providing this information, how to use the customer's transferable skills to move into an occupation and industry with a demand for workers with her skills, is an expanded service. The Employment Counselor may believe the customer would continue to benefit by receiving a group of services on a continuing basis until the customer is satisfied with a new career path, a direction for finding employment in the new career, and an eventual offer of employment in the new field.* The customer agrees that she would like to stay in close contact with the Employment Counselor as she receives a series of Workforce Solutions services until she has found satisfactory work. This customer would be tracked in TWIST under one of the funding streams available to pay for her services. Subsequent steps in the service process for these customers are found in the Expanded Services Standard.

A customer, who prefers not to commit to a continuing relationship with the counselor but prefers to ask for additional help if and when she feels she would benefit, will be tracked in WorkInTexas.com. Customers who are not ready to work or to look for work and need more intensive services to help them overcome barriers before beginning job interviews will be referred by the Employment Counselor (EC) to the appropriate staff specialist for help.

**Note:** All customers who are data entered into TWIST/Program Detail with a service under that Program funding source are included in performance measures for that funding source.

A customer, who is required to look for work through Workforce Solutions in order to receive TANF cash benefits or Food Stamps, or an ex-felon referred by from the Texas criminal justice system, is assessed in the same way as other customers. These customers who are work ready may or may not choose to receive an ongoing series of basic and expanded services. These customers are tracked in TWIST regardless of the level of services received.

*The next step for customers coming to Workforce Solutions because they have applied for TANF Cash Assistance.* To be certified to receive TANF benefits, an applicant must have an HHSC referral form stamped at Workforce Solutions (HHSC form 2588). The stamped form notifies HHSC that the customer applied for work at Workforce Solutions. When an Employment Counselor determines the customer is ready to look for work without help from another WorkSource specialist, the counselor will provide the customer referrals to open job opportunities, advice about how and where to look for work, and other helpful job search services provided by Workforce Solutions. The counselor and the customer agree on a “next step” and the customer is scheduled for another appointment as needed.. The Employment Counselor will then stamp the HHSC form 2588 and return it to the customer. The counselor must write in the appointment time on the bottom of Workforce Solutions orientation

brochure and make sure the customer understands when she is to return and for what purpose. The Employment Counselor will ensure that the customer has signed the office copy of the Family Service Plan agreement found in the brochure titled Facts on TANF and will remove that page for placement into the customer's physical file. If the customer has a signed paper Work Application or a signed addendum, place in them the physical file. All of the paperwork is given to the Program Tracking Specialist to data enter in the appropriate MIS and/or include in the physical file. (See Attachments 6. Program Tracking Specialist Job Description)

The Employment Counselor may determine the customer is not yet ready to look for work or to work. She will refer the customer to Workforce Solutions staff specialist who can address the problems that keep the customer from finding or keeping a good job. Usually a Financial Aid Specialist or a Personal Service Representative can help the customer become work ready. The customer may be given an appointment to return to see the specialist or she may be able to speak to the specialist immediately. The last staff person to see the customer on the day of orientation will provide or review the appointment time for the customer's next visit.

*For example, Sally Smith came to Workforce Solutions because she was told at HHSC to do so. Ms. Smith has barriers that will prevent her beginning job search. After a short consultation directly following the orientation, the Employment Counselor refers Ms. Smith to a Personal Services Representative (PSR). The PSR talks to Ms. Smith and gives her an appointment for further services agreed to by both of them. The return appointment for Ms. Smith includes taking a TABE test and further discussion of possible training while looking for part time work. It is important to ensure that the customer understands the time of the next appointment, who she will see at that appointment, and what she can expect from the appointment. In this example, the PSR will stamp the HHSC Form 2588 for the customer and assure that all paper work is given to the Program Tracking Specialist.*

## **V. Performance Measures Associated with this Standard**

1. Workforce Solutions system must meet the standard set by the Workforce Board for the measure **Customers Who Entered Employment**.
2. Each office must meet the standard for **Direct Placements**.
3. Each office must provide Workforce Solutions **Customer Satisfaction Survey** to all customers entering the office during the second week of October, February, and June. The Survey must show a 70% response rate and no more than 30% of customers indicate that they are dissatisfied or only marginally satisfied.
4. If an office experiences a downward trend in **Customer Satisfaction** indicated by a decline of 5 percentage points or more from the initial survey results for two consecutive quarters, a corrective action plan will be prepared and implemented. For example, a corrective action plan would be necessary in the following instance. The office had a customer satisfaction rating of 90% on the first survey. The office rating is 83% on the

second survey, and 85% on the third. Two consecutive quarters are down 5 points or more from the initial survey. The plan will be approved by the contract representative and monitored by the H-GAC monitors.

5. Monitoring visits will determine an office's proficiency in providing basic services. A monitoring instrument following the process outlined in this standard is used to review the activities and outcomes of those responsible for primary delivery of basic services.
6. Greeters, Resource Specialists and Employment Counselors are the primary providers of basic services. Greeters in each office will have the same job description and performance expectations. The same is true for Resource Specialists and Employment Counselors. The job descriptions and performance expectations are found in attachments to this standard. Greeters, Resource Specialists, and Employment Counselors will have their individual job performance measured according to the performance expectations in the Standard. Individual monetary compensation including merit increases, as well as continued employment, will depend on that performance.

## **VI. Data entry and reporting requirements**

1. **Work Application** – The Work Application is usually the first information to be data entered into Workforce Solutions database. The Work Application must be data entered into WorkInTexas.com for each resident customer who wants to receive staff assisted job matching services or expanded services - regardless of the funding stream(s) supporting the service. All staff assisted job referrals provided to a customer must be entered into WorkInTexas.com.

The work application is maintained in the electronic database. A signed paper Work Application serves the same purpose as the Work Application Addendum. All of the information collected on the Addendum is included on the paper Work Application in addition to the information data entered into WorkInTexas.com.

It is not necessary for a customer to complete and sign the paper application, however when she does, it should be filed alphabetically in the office file for Work Application Addendum of customers who are not receiving expanded services tracked in TWIST. It will be kept for 12 months unless moved to a separate file for customers receiving expanded services tracked in TWIST. The Work Applications will be filed alphabetically by month allowing an easy method of purging files a month at a time at the 13<sup>th</sup> month.

2. **Work Application Addendum** – The Addendum is a short paper document that provides information helpful in determining what a customer wants and expects from Workforce Solutions. It also provides information necessary to determine a customer eligible for Expanded Services supported by WIA-Adult and WIA- Dislocated Worker funds.

A customer will not have completed the addendum information if she completes her work application directly into WorkInTexas.com. When the customer and the WorkSource staff agree that a series of Basic and Expanded Services is best, the staff member working directly with the customer will ask that customer to complete and sign the one page Work

Application Addendum. File the signed form alphabetically in the office file for customers receiving Expanded Service. In some cases, staff will complete additional information on the Work Application addendum out of customer's presence. The additional information includes required military draft registration information and evidence of dislocation when it is available. Only paper documents not found in electronic files should be attached to the addendum. Staff should not print out copies of documents or information from TWIST or any other information system and place them in a physical file.

Staff offering a series of Expanded Services to a customer with an application in WorkInTexas.com may not know whether the addendum information was collected as part of the new paper application on an earlier visit. When it is more convenient for the customer (i.e., staff should not make a customer wait while they search files for a previously completed Addendum), staff will ask the customer to complete and sign the short form – Work Application Addendum. It will be placed in the addendum file for customers receiving Expanded Service. (See VII.E. "Use of the Addendum to determine when services may be funded by WIA Adult and WIA Dislocated Worker")

Filing the Work Application and Application Addendum in a separate file for customers who receive expanded services allows monitors to easily review this alphabetical file and determine if eligibility was properly documented. The customer will not be required to provide further proof of age or citizenship unless an Application for Financial Aid is submitted at which time additional information will be obtained from the customer, some of which will be recorded in TWIST.

When a customer is receiving financial aid from Workforce Solutions, or when her hours of cooperation are tracked, she will have an individual file folder. The paper addendum will be included in this folder.

### 3. **Work Search Assessment Desk Aid (See VII.F.)– Determining the Next Step**

The Desk Aid is intended to help guide a staff person's conversation with a customer to determine whether the customer has begun a job search and, if so, whether the search is producing the desired results. It is not a form to be completed by either staff or customers. It must be used in conjunction with the Work Application information listing job skills, experience, salary history, and work goals. The staff and customer together determine the most likely reasons the customer has not yet found work. The Desk Aid provides a list of service options useful to staff who is suggesting the next step to the customer. The desk aid informs staff whether the next service falls is a basic service or expanded service. If the Employment Counselor believes the customer is not ready to work or to look for work, the customer is offered the services of a staff specialist to help her become work ready. The desk aid may be transmitted electronically and reproduced. It may be found on Workforce Solutions web site at: <http://www.wrksolutions.com> attached to this Standard as VII Information Resources for Staff, F.

When a customer is not work ready and is receiving help from a Personal Service Representative or when a work ready customer and the Employment Counselor agree to proceed with a continuing series of expanded and basic services the following records are entered:

- Complete the Program Detail in TWIST to track the customer's services under one or more of Workforce Solutions funding sources. (*See Information Resources for Staff Section VII.K. 1-6 TWIST Data Entry Aid*).
- *TWIST/Service Tracking* – Enter into TWIST/Program Detail/Service Tracking at least one service for customers who are receiving a series of expanded services and who want to continue working closely with Workforce Solutions counselors. Select a Program Type (WIA, Choices, FSE&T, RIO, TAA).
- Enter into WorkInTexas.com staff assisted job referrals provided. It is not necessary to enter subsequent services into both systems. The information posted in one system may be viewed from the other. It is not necessary to reference services entered in WorkInTexas.com in the counselor notes.
- The Employment Counselor or Personal Service Representative will enter a short statement into the counselor notes when the customer wants a series of expanded services. The Counselor notes will begin with the date and name of the counselor. The short statement in the counselor notes will indicate what services are planned and the desired result.

The following is an example of a statement that might be found in a counselor note for a work ready customer. *“Sally Brown would like to use skills gained in previous jobs to begin to look for work as a technical writer in the oil industry. While continuing to search for a job, she will participate in workshops to develop a new resume, learn more about how her skills might apply to other occupations and industries and possibly take an interest-inventory test. Should she determine that this course of action is not producing the desired results, we will discuss another direction.”* It is not necessary to enter additional information into the counselor notes unless there is a change in direction of the job search. Services provided during Workforce Solutions association with the customer will be entered into TWIST services or WorkInTexas.com.

The services we provide to TANF applicants/ recipients, Food Stamp recipients required to search for work at Workforce Solutions, and ex-felons requiring RIO services are all tracked under TWIST Program Detail, regardless of the level of service received. All of the records noted in the bullet points above are necessary when tracking the services provided to these customers in TWIST except the counselor note. The counselor note is only required for work ready customers receiving a series of expanded services or customers working with a Personal Service Representative to overcome barriers to work.

Customers who's services are funded by TANF, FSE&T, or RIO can almost always have the expanded services they receive tracked under WIA. (See *Information Resources for Staff Section VII.E., Use of the Addendum to determine when services may be funded by WIA Adult and WIA Dislocated Worker*)

4. **Recording Response from Customers Recruited through the Worker Profiling System** (See *VII. Information Resources for Staff G. "Instructions for the Worker Profiling Data System*)

Customers receiving Unemployment Insurance benefits may respond in person, by telephone, or email to letters sent to them through the Worker Profiling system. Responses are recorded in WorkInTexas.com. The Worker Profiling System assigns a score to most Unemployment Insurance benefit recipients when the customer receives her first UI payment. It is believed that the higher the score, the more likely the customer is to exhaust her UI benefits before finding work. Workforce Solutions staff should offer every customer responding to these letters help in finding work.

The Worker Profiling recruitment letter states that if the customer does not respond to the letter, she may lose her UI benefits. Workforce Solutions staff must document in WorkInTexas.com when the customer responds. If this information is not entered, it will negatively affect the customer's UI benefits. (See *VII. Information Resources for Staff G. "Instructions for the Worker Profiling Data System" for complete data entry instructions for issuing the letter and posting the attendance. Numbers 21 – 23 indicate how to data enter attendance.*)

5. **Recording Orientation Attendance for Customers Who Have Applied for TANF Benefits, TANF Recipients, Food Stamp Recipients recruited to Workforce Solutions, Ex-offenders** (see *Information Resources for Staff VII. K.3-6. Adding Customers to TWIST – Program Detail* )

- All of the information collected at individual or group orientations will be given to a Program Tracking Specialist to data enter or maintain in an individual's physical file folder. Information data entered into any MIS should not be duplicated in the paper file. Information from the orientation will likely include:
  1. Work application or application update - Recorded in WorkInTexas.com
  2. Job referrals - Recorded in WorkInTexas.com
  3. Information to create a TANF Applicant, Choices, Food Stamp E&T or RIO Record – Recorded in TWIST Program Detail
  4. Orientation Attendance – Recorded in TWIST – Services – Orientation (30)
  5. Other services – Recorded in TWIST or WorkInTexas.com
  6. Next appointment date – Recorded in the TWIST customer record under "Initial Appointment Date"
  7. Signed Family Employment/Employment Plan – Recorded in Paper File. The plan is taken from the office copy of the agreement in brochure titled "Work Orientation".

8. Signed Paper Work Application or Work Application Addendum – Recorded in Paper File

- The work application, or application update, and any services or job referrals provided by the Employment Counselor will be data entered into WorkInTexas.com. The Program Tracking Specialist may enter this information at the same time that she creates a Program Detail record TWIST. When the customer already has a work application in the database, the Employment Counselor will update the application information and enter services and job referrals into WorkInTexas.com while she is with the customer.
- When the customer has an HHSC form 2588 the Employment Counselor will stamp the form 2588 and return it to the customer unless the customer is to see another staff person (usually a Financial Aid Specialist or PSR) before leaving. The last staff person to help the customer on the day of orientation will stamp the form 2588 and ensure the customer knows the date of her next appointment.
- The last staff person to provide services to the customer on the day she comes to an orientation will ensure that all of the above information is given to the Program Tracking Specialist for data entry into the appropriate MIS or placement in the file folder. The Family Employment Plan agreement from the TANF Orientation brochure will be signed each time that the customer is referred by HHSC- as a TANF applicant whether she attended a group or individual orientation. Customers may have a signed Work Application or Addendum.

Any customer referred by another agency to the same Workforce Solutions orientation more than once during a 12-month period will be seen individually. She will not be required to attend a group orientation again. Her need for particular WorkSource services will be reevaluated by the appropriate staff person after a review of her current situation. She will receive and sign another office copy of the brochure reminding her of the agreement with the Family Employment Plan/Employment Plan and the penalties of non-cooperation. A Program Tracking Specialist will enter into TWITH the customer attended another orientation. The new signed agreement will be placed in the customer's individual folder in front of the previous signed agreement page.

## **VII. Information Resources for Staff**

- A. Technical Assistance Guide – Directing Resident Customers to the Services Requested
- B. Workforce Solutions Work Application - Spanish
- C. Work Application Addendum – English
- D. Work Application Addendum - Spanish
- E. How to use the Addendum for charging services to WIA Adult or Dislocated Worker

- F. Work Search Assessment Desk Aid – Determining the Next Step
- G. Instructions for the Worker Profiling Data System
- H. Orientation Scripts
  - 1. Profiling – Serving customers who respond to a letter
  - 2. A. TANF Applicants – Power Point
  - 2. B. TANF Applicants – Staff Guide
  - 3. Food Stamp Recipients
  - 4. Ex-Offenders
- I. Recruitment Letters
  - 1. Invitation to customers receiving Food Stamps who are required to participate to continue receiving food stamps.
  - 2. Letter to customers identified through the State’s Worker Profiling system
  - 3. Invitation to customers who are receiving TANF but are exempt from a requirement to work with Workforce Solutions to receive TANF benefits
  - 4. Letter to TANF customers who are not cooperating and may lose benefits
  - 5. Letter to TANF customers currently receiving cash benefits who have never been to Workforce Solutions office
    - a. Letter Instructions
  - 6. Letter to TANF customers close to end of 4 week allowed work search activity.
  - 7.A. Follow up letter for working TANF customers
  - 7 B. Follow up telephone call for working TANF customers
- J. Survey
- K. TWIST Data Entry Aid
  - 1. Adding a customer to TWIST WIA Adult Fund
  - 2. Adding a customer to TWIST WIA Dislocated Worker Fund
  - 3. Adding a customer to TWIST TANF Applicant Fund
  - 4. Adding a customer to TWIST Choices Fund
  - 5. Adding a customer to TWIST Food Stamp E&T Fund
  - 6. Adding a customer to TWIST RIO Fund
  - 7. Changing a TANF Applicant to Choices
- L. Documents Required in a Customer Paper File

**Attachments:**

- 1. Greeter Job Description and Performance Expectations
- 2. Greeter Customer Service Observation Form
- 3. Resource Specialist Job Description and Performance Expectations
- 4. Resource Specialist Customer Service and Knowledge of Resources Observation Form
- 5. Employment Counselor Job Description

6. Employment Counselor Customer Service Observation Form
7. Workforce Solutions Quality of Referrals Rating
- 7.a. Workforce Solutions Quality of Referrals Rating in Excel
8. Program Tracking Specialist Job Description