

Adding a Customer to TWIST TANF Applicant Fund

Step	Action	Then
1	Click on Customer Information Icon	Go to Step 2
2	Enter Social Security Number	If “No Customer with the Name/SSN” appears, go to step 3
3	Click on Search Other Database Select “TANF” or “Food Stamp” and Click on “Search”	If “No Information Found” appears go to Step 4
4	Click on add a new customer	Go to Step 5
5	Enter Birth date; In Mailing Enter: Address; In Residence Enter: “Same” or different address Phone Number; County Code	Click on save (computer disk icon) go to step 6
6	Click on characteristics tab (Insure there is a dot besides Specialized Services if not check the circle next to it)	Go to step 7
7	Enter Gender; Citizenship; Ethnicity	Click on save (computer disk icon) go to step 8
8	Click on “Program Detail” under “Menu Selection”	Click on “right” button on mouse to add a record in the blank area on the right side of screen. Go to step 9
9	Enter in Program Type: App/Choices/Choices + Enter Initial Appointment Date: (date customer is given on brochure appointment card) Enter Office 3, 4 & Staff: if information is not defaulted from staff profile or incorrect	Click OK Click on save (computer disk icon) Note: You now have a Record Go to Step 10
10	Click on newly created App/Choices/Choices + Program Detail to open. Enter TANF Applicant work code, TANF application date, TANF Applicant number, & TANF Applicant type Program from DHS form 2588.	Click on save Go to Step 11
11	Click on Service Tracking	Go to step 12
12	Right click on mouse to add: Service Category: Enter service code for orientation Service: Code 30 for Workforce Orientation for TANF applicants Start Date: Usually date of orientation Planned End Date: Usually date of orientation County: City:	Go to Step 13
13	Right click on mouse to add entry in lower portion of screen in the “Fund Detail” area: Fund: TANF Applicant Start Date: Same as Service start date Click “OK” and save.	<u>Finished</u>