

Adding a Customer to TWIST Choices 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 the 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: Choices Enter Initial Application Date: (date customer applied at DHS) Enter in Eligibility Date: (Date determined Eligible for Service) 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 Service Tracking	Go to step 11
11	Right click on mouse to add: Service Category: 3 Job Search Services Service: Choose appropriate code Start Date: Planned End Date: County: City:	Go to Step 12
12	Right click on mouse to add entry in lower portion of screen in the “Fund Detail” area: Fund: Choices Start Date: Click “OK” and save.	<u>Finished</u>