

Changing a Customer from TANF Applicant to Choices

| Step | Action | Then |
|------|---|---------------------------------------|
| 1 | Click on Customer Information Icon | Go to Step 2 |
| 2 | Enter Social Security Number | Go to step 3 |
| 3 | Click on the App/Choices/Choices + Program Detail to open. Change the Initial Appointment date to the date Choices' benefit started. If there is an "Exit Date", delete | Click on save Go to Sept 4 |
| 4 | Click on Service Tracking | Go to Step 5 |
| 5 | Click on Support Service Tab | Go to Step 6 |
| 6 | Close all Support Services being provided with TANF Applicant funds using the date prior to the start of TANF benefits. Click ok and save | Go to Step7 |
| 7 | If the service to be provided is same as the one provided with TANF Applicant Funds Or If the service to be provided is different from the one provided with TANF Applicant Funds | Go to Step 8 Go to Step 10 |
| 8 | Change the "Planned Completion Date" to a future date. Delete the "Completion Date" and "Completion Reason" | Go to Step 9 |
| 9 | Go to the "Fund Detail" area; Change the end date to the date prior the day the TANF benefit started. Right click in the funds detail area and click add and update the funds line with: Fund: Choices Start Date: Date TANF benefit begin Click "OK" and save. | <u>Finished</u> |
| 10 | Close the service (NOT the program detail) being provided with TANF Applicant funds. (A final completions reason and date must be entered updated. The End Date in the Fund Detail area must also be updated). Click OK and save. | Go to Step 11 |
| 11 | Right click on mouse to add new Service: An Example Service Category: 6 Employment Services Service: 40 Community Service Employer Details: Start Date: the date TANF benefit started Planned End Date: County: City: | Go to Step 12 |
| 12 | Right in the Fund Detail area of the service being added. Click on Add | Go to Step 13 |
| 13 | Update using Choices as the fund. The start date will be the same as the that TANF benefit was started. Click OK and save. | <u>Finished</u> |