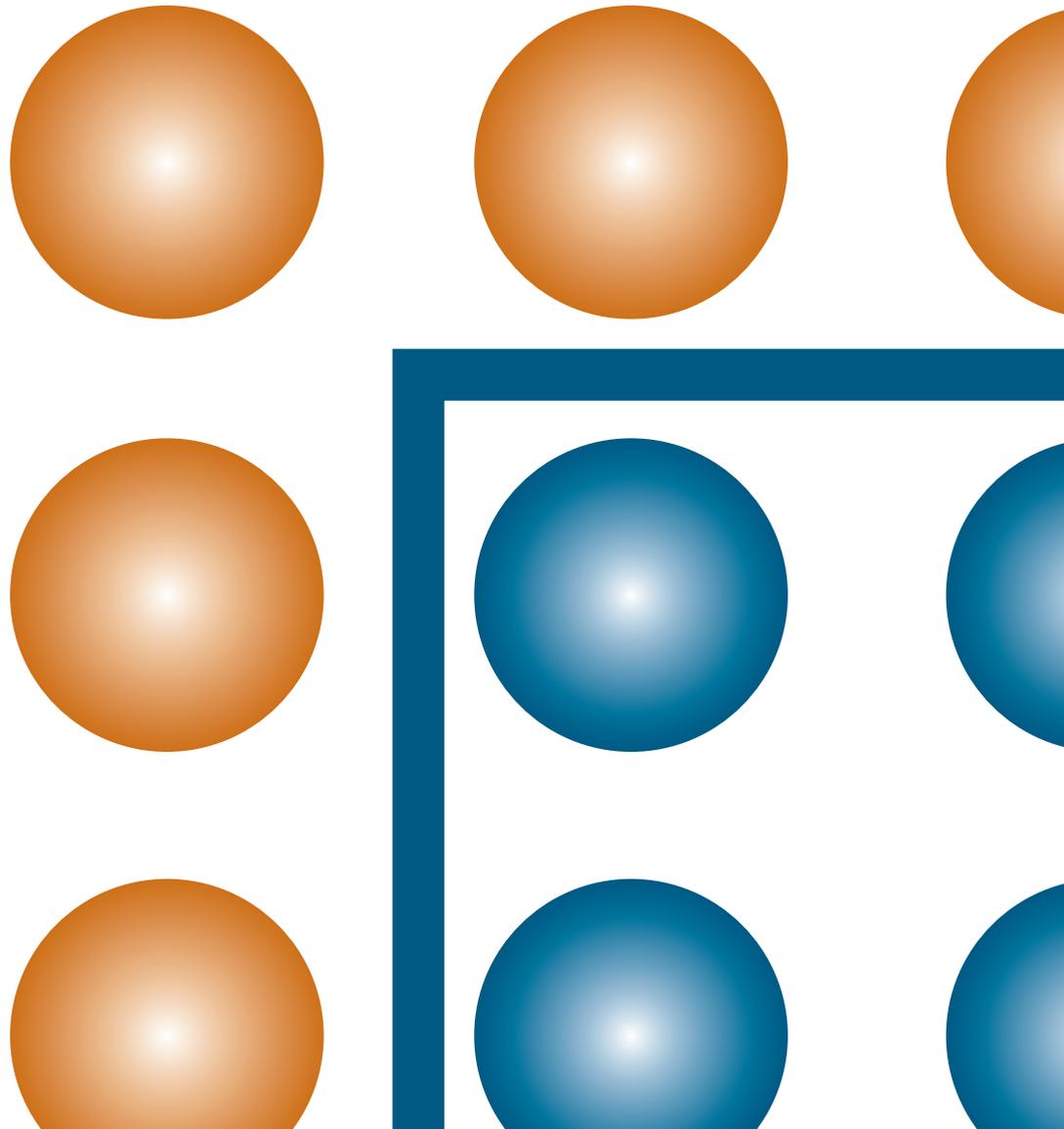




NATIONAL WORKFORCE INSTITUTE

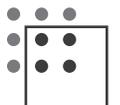
WORKFORCE SOLUTIONS FINANCIAL AID:

A Blended Learning Course



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A Blended Learning Course



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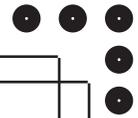
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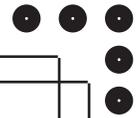
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INTRODUCTION

Course Prerequisites and Structure

Workforce Solutions Financial Aid is a blended learning course. It includes both elearning and instructor-led classroom training. You must have completed the eLearnings *Using DocuWare*, *Using FAMS*, and *Using FACS* before attending the classroom session.

Purpose

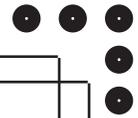
This workshop is designed to introduce the process for providing financial aid for education, training, and support services. The training includes information about determining eligibility for Workforce Solutions' financial aid from a variety of funding sources and tracking customer progress in various components of the Workforce Solutions MIS.

Objectives

At the end of the classroom training, you will be able to:

- List eligibility requirements for receiving financial aid for education, training, and support services.
- Distinguish between families eligible for immediate financial aid to assist with child care and families who need to provide additional documentation.
- Outline the process for starting, stopping, changing, and continuing child care.
- Calculate a family's income to make an eligibility determination for WS financial aid.

NOTES



WORKFORCE SOLUTIONS FINANCIAL AID PRE-ASSESSMENT

Directions: Circle the letter of the BEST response to each of the following statements.

1. Workforce Solutions financial aid is divided into two categories:
 - A. Child Care and Other
 - B. Short-term and Substantial
 - C. Scholarships and Child Care
 - D. Over \$200 and under \$200

2. Enter income data from the Financial Aid Application into TWIST on the:
 - A. Employment Status tab
 - B. Income tab
 - C. Assessment tab
 - D. Income Redetermination tab

3. Marco has applied for Workforce Solutions financial aid to go to school. He lives with his mom, dad, and two sisters. Marco has an eight year old daughter. What is his family size?
 - A. Six: everyone in the household
 - B. Three: Marco, his mom and dad
 - C. Two: Marco and his daughter
 - D. Five: Marco, his mom, dad, and two sisters
 - E. Either C or D, whichever benefits Marco

4. When calculating income for WIOA eligibility:
 - A. Use only the most recent complete month's income
 - B. Use the most recent ninety days of income
 - C. Use the last twenty-six weeks of income
 - D. Only use 65% of the last twenty-six weeks of income

5. For an Out-of-school Youth you must determine the customer's economic eligibility with which challenge?
 - A. Homeless
 - B. School dropout
 - C. Received a high school diploma and is basic skills deficient or an English language learner
 - D. Pregnant or parenting

6. For WIOA funds, Selective Service registration must be documented on:
 - A. All customers seeking financial aid from Workforce Solutions
 - B. All males born on or after January 1, 1960, who are at least 18 years of age
 - C. All males with active military service records after January 1, 1962
 - D. All customers who express an interest in entering military service during war time

7. When assessing income for WIOA:
 - A. Verify 65% of income earned in the 26 weeks prior to the date of the Financial Aid Application
 - B. Multiply the amount on the customer's paycheck by 12
 - C. Require self-employed customers to submit 12 months of business receipts
 - D. Make a determination based on the documentation received

8. In a two-parent family applying for financial aid for child care:
 - A. Both parents must each be working 25 hours per week
 - B. Both parents must each be working or going to school 25 hours per week
 - C. Both parents must be working and/or going to school for a combined total of 50 hours per week
 - D. None of the above

9. What desk aid provides Workforce Solutions guidelines for eligibility documentation sources for WIOA and child care?
 - A. Income and Family Definitions desk aid
 - B. Validating and Entering Qualifications desk aid
 - C. WIOA Eligibility Checklist
 - D. None of the above

10. An individual may meet the economic eligibility criteria to qualify for WIOA funds based on all but which of the following qualifiers:
- Receives public assistance, or received public assistance in the last six months
 - Is homeless
 - Has aged out of foster care
 - Receives, or is eligible to receive, free or reduced priced school lunch

Becky White submitted a WS Financial Aid Application requesting assistance to attend school, dated September 26, 2016. Her last day working was August 6, 2016. She also submitted all supporting documentation and two paychecks with the following information:

Pay Period	Pay Date	Gross Pay - This period	Gross Pay - YTD
3/1/2016 - 3/31/2016	4/1/2016	\$ 2,670.54	\$ 28,322.81
8/1/2016 - 8/31/2016	9/1/2016	\$ 909.86	\$ 37,601.30

11. What is the income determination period? (Use one of the resources mentioned in class)
- March 26, 2016 through September 24, 2016
 - March 25, 2016 through September 26, 2016
 - March 27, 2016 through September 25, 2016
 - June 26, 2016 through September 25, 2016
12. What is Becky's income for the **income determination period**?
- \$11,949.03
 - \$9,278.49
 - \$1,991.50
 - Not enough information to determine

13. Customers immediately eligible for child care financial aid include:
 - A. Individuals with low income
 - B. Families with children with disabilities
 - C. Low-income families with more than six children
 - D. Choices participants

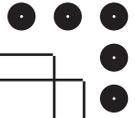
14. Providers of child care are classified as:
 - A. Regulated and unregulated
 - B. In-network and out-of-network
 - C. Licensed and unlicensed
 - D. Day care

15. Prior to adding a customer to the wait list, you must:
 - A. Establish eligibility
 - B. Determine the number of children that need care
 - C. Record the customer's contact information
 - D. Count the number of family members

16. Instruct customers added to the wait list to:
 - A. Call the career office once a month to keep their name on the list
 - B. Notify the career office if their address changes
 - C. Go to the nearest office if they get a letter from Workforce Solutions
 - D. Recertify every 12 months

17. Prior to awarding financial aid for child care, make sure the customer:
 - A. Has signed the Parent Agreement
 - B. Has signed the Personal Responsibility Agreement
 - C. Knows how much the day care charges
 - D. Has been scheduled for a home visit

18. Which of the following documentation is required to determine eligibility for financial aid for child care assistance?
 - A. Children's social security number
 - B. Child's proof of citizenship
 - C. Parent's proof of citizenship
 - D. Form 2050

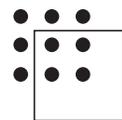


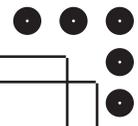
19. A customer eligible of Financial Aid for child care will receive care for a minimum of:
 - A. 6 months
 - B. 12 months
 - C. 18 months
 - D. 24 months

20. Cooperation with the Attorney General's office must be documented for:
 - A. All children under 18 in the household whose non-custodial parent is not also in the household
 - B. Only children who will be in child care
 - C. Only children in the household not the natural child of both parents
 - D. None of the above

NOTES

DETERMINING ELIGIBILITY FOR WORKFORCE SOLUTIONS FINANCIAL AID





DETERMINING ELIGIBILITY FOR WORKFORCE SOLUTIONS FINANCIAL AID

Introduction

Workforce Solutions (WS) may provide financial aid as part of a plan for someone to get a job, keep a job, or get a better job. Financial aid comes in the form of:

- **Education Support** – assistance to help customers obtain education or training to meet the expectations of employers in the Gulf Coast region. Education support can include scholarships, tuition, books, and fees for career training, career advancement training or basic education.
- **Work Support** – assistance to help customers accept a job offer or keep a job.
- **Work Search Support** – assistance to help customers look for work.

Work support and work search support can include child care, transportation, equipment, uniforms, and certification expenses.

There are two levels of financial aid:

- **Short-term assistance** is available once in a three year period, to help a customer go to work quickly, or to keep an existing job.
- **Substantial assistance** is to help a customer meet longer term employment goals or maintain employment. Substantial assistance may be more than one time, occur over months or years, and be related to different customer needs.

Workforce Solutions financial aid is available for people who need help meeting their employment goals and are unable to get the assistance from other community resources. It is also available for customers receiving benefits such as Temporary Assistance for Needy Families (TANF) and Supplemental Nutrition Assistance Program (SNAP) to comply with job search/readiness requirements. Workforce Solutions financial aid is limited based on the type of assistance (short-term or substantial), the categories of aid¹, and the availability of funds. Office managers may allow exceptions to the limits when the customer has extraordinary circumstances documented in the employment plan and TWIST Counselor Notes.

1 Refer to the *Workforce Solutions Financial Aid Limits* for categories of aid and their limits.

Workforce Solutions financial aid categories include:

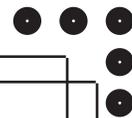
- Education
- Early education/child care
- Transportation
- Health care or health-related
- Clothing
- Tools
- Licenses
- Documents

The money used to provide financial aid support to customers comes from funding sources that include:

- The Workforce Innovation and Opportunity Act (WIOA) four funding streams:
 - Adult
 - Dislocated Worker
 - In-School Youth
 - Out-of-School Youth
- Temporary Assistance to Needy Families (TANF)
- Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T)
- Trade Act
- Child Care and Development Funds
- Special sources (for example, National Emergency Grants [NEGs] or Child Care Match Funds)

There are different rules and procedures for determining eligibility for both levels of financial aid (short-term and substantial) and for each funding stream². Consider all funding streams for which the customer may be eligible when conducting assessments and creating a plan.

² Use the *Validating and Entering Qualifications for Workforce Solutions Financial Aid* desk aid for a list of documentation which serves as verification of eligibility criteria. Refer to the *Glossary of Terms for Workforce Solutions Financial Aid* for an explanation of income terms.



Short-Term Assistance

Short-term assistance is provided by career office staff to help an individual go to work immediately (in a job that will last at least 30 days), or to keep his/her current job. It can only be awarded one time in a three-year period, and the amount is limited depending on the categories requested¹.

Note: If a customer makes a subsequent request within a three-year period, it is considered a request for substantial assistance, which requires completion of the *Workforce Solutions Financial Aid Application*, assessment, and eligibility determination.

The *Workforce Solutions Addendum* is used by Career Office staff to gather information needed for a customer to receive short-term assistance. Customers must also complete the *Orientation to Complaint* form and provide documents to prove they can legally work in the U.S. (I-9 documentation). Sign the bottom of the *Addendum* to verify you checked the customer's Selective Service Registration, collected supporting documentation for work status, and Dislocated Worker status, if necessary.

IMPORTANT NOTE:

Customers identified as Temporary Assistance for Needy Families (TANF) applicants or recipients, and Supplemental Nutrition Assistance Program (SNAP) recipients are not required to complete the Addendum.

Eligibility per the Addendum

- Eligibility to work in the U.S.: Customers must provide documentation from the I-9 checklist to support their Authorization to Work.
- Selective Service Registration: Men born after January 1, 1960 must register for Selective Service when they turn 18 and no later than their 26th birthday. Verify registration at www.sss.gov. If a customer has not registered, obtain a written statement from the customer explaining why he did not register. Review the statement and decide if the customer knowingly or willfully failed to register. If he did not, enter a counselor note in TWIST explaining your decision to provide assistance. If he did, inform the customer he is not eligible for WS financial aid and document your decision in a counselor note. Look for other ways to help the customer. For more information about who must register with Selective Service go to www.sss.gov.
- Meet qualifications for WIOA Adult or Dislocated Worker:
 - Adult
 - Age 18 or older
 - Dislocated Worker

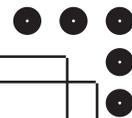
Individuals qualify for Workforce Solutions financial aid as a Dislocated Worker if they are unemployed through no fault of their own or have received an official layoff notice. There is no income test to qualify. Customers must meet the general eligibility requirements, and qualify under one of six sets of criteria:

1. Laid off

There are three ways a customer may qualify under this category:

A. An individual who (must meet all three qualifiers below):

- Has been terminated, without cause, or laid off, or has received a notice of termination or layoff, from employment; and
- Is eligible for or has exhausted entitlement to unemployment compensation, or can demonstrate an attachment to the workforce. (Has been employed for a period of time, but is not eligible for unemployment compensation due to insufficient earnings or having worked for an employer not covered UI; and
- Is unlikely to return to a previous industry or occupation



Note: Unlikely to return to a previous industry or occupation is determined through an evaluation of the labor market, which determines that:

- The industry or occupation shows either no growth or a decline in available job opportunities as documented by labor market statistics or TWC-approved labor market analyses;
 - The individual has been seeking – since termination, layoff, or receipt of notice of layoff – but has been unable to find employment in his or her previous industry or occupation due to economic conditions and/or skill limitations, or
 - There is a lack of suitable matches in WorkInTexas.com.
- B. Temporary or Seasonal Workers – Individuals laid off or terminated because of the cyclical, intermittent, or seasonal nature of their employment may be provided individualized career services and training services as a dislocated worker. However, these services should be available only to those customers interested in developing skills in non-seasonal occupations.
- C. Expedited Eligibility:
- Trade Affected (TAA) eligible

2. Permanent Closure or Substantial Layoff

An individual who:

- has been terminated or laid off, or has received a notice of termination or layoff, as a result of any permanent closure of, or
- any substantial layoff, or
- is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days.

3. Previously Self-employed

The individual was self-employed but is currently unemployed as a result of

- general economic conditions in the community in which the individual resides, or
- because of a natural disaster.

This includes individuals working as independent contractors or consultants but not technically employees of a firm.

4. Displaced homemaker:

An individual who:

- has been providing unpaid services to family members in the home;
- is unemployed or underemployed and experiencing difficulty finding or upgrading employment; and
- meets one of the following:
 - has been dependent on the income of another family member but is no longer supported by that income; or
 - is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the member.

Note: A displaced homemaker may lose support income due to divorce or the death of a spouse. In addition, the loss of support income may be the result of a former wage earner's job loss and that former wage earner may still be living in the home.

5. Spouse of a member of the Armed Forces who:

- has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member; or
- is unemployed or underemployed and experiencing difficulty finding or upgrading employment.

Note: Veterans who fall into the categories on page two of the Addendum receive priority for all Workforce Solutions services.

6. Former members of the military who were discharged within the previous 48 months, and

- The discharge status is anything other than dishonorable
- He/she did not retire from the military

Note: When a customer wants to change an answer on the Addendum, have them:

1. Strike through the incorrect answer,
2. Enter the correct answer, and
3. Initial the change.

TWIST

Enter the following information in TWIST:

- A Program Detail
- An Objective assessment service and counselor note
- Support services entry on the Support Service tab
- Counselor notes, including:
 - A summary of eligibility for Workforce Solutions funds
 - Documentation and/or verification from the employer that the customer has a job or job offer and the customer needs assistance from Workforce Solutions to accept or keep her job.

Documentation of employer confirmation includes, but is not limited to:

- Check stub – customer is working
- Letter from the employer – on company letterhead – stating customer is an employee or scheduled to start as of a certain date
- Phone confirmation by the employer that the customer is an employee or is scheduled to start as of a certain date. Record details in TWIST counselor notes and include:
 - Name of employer
 - Employer contact
 - Phone number
 - Customer employment status or pending hire date
- An explanation as to why the customer is unable to obtain timely assistance from other community resources and determination that Workforce Solutions is the appropriate source for the requested assistance.
- Job Search Map: Record a Job Search Map in the counselor notes or complete an employment plan in TWIST for customers who ask for help to get a job, keep a job, or get a better job.

Exception: A Job Search Map or employment plan is not required if the customer is employed or has a job offer and is not seeking additional assistance from Workforce Solutions to find a job or get a better job.

Substantial Assistance

Substantial assistance is intended to address customers' long-term needs associated with completing a Workforce Solutions employment plan, is not a one-time grant of financial support to an individual or family, and is available in two types: Scholarship and Child Care. Substantial assistance is limited based on the type of assistance³ and funding source. Each funding source has specific criteria for eligibility and how services can be provided.

Scholarship

A Workforce Solutions scholarship may be awarded to a customer for:

- Education support
- Work support
- Work search support

Scholarships are intended to help customers who need more time and dollars over a longer term to meet employment goals or maintain employment. Scholarships for work search and education are part of an extended relationship between Workforce Solutions and the customer and may require:

- A full assessment to determine the customer's suitability for the assistance,
- Career planning, including an employment plan,
- Coaching, and/or
- Extended intensive job search activities.

Scholarships may be more than one time, occur over months or years, and be related to different customer needs. Career office staff approve the scholarship request and FASC staff determine eligibility.

Before you make an eligibility determination for WIOA funds, refer to the counselor note in TWIST with the subject line "Initial Assessment" to verify the customer worked with Career Office staff and is suitable for the scholarship. If the customer is not suitable, deny the application.

3 Refer to the *Workforce Solutions Financial Aid Limits* for categories of aid and their limits.

Limitations and Qualifications

All Workforce Solutions funds are limited and not all customers are eligible for all funds. Refer to the *Financial Aid Limits by Category Chart* for the categories and limits for funds. Each fund source has its own unique set of rules and eligibility requirements related to a customer's situation. When you assess a customer for financial aid, consider all funding streams. You may use one or all of the available sources to provide financial aid.

● Assessment

The first step when applying for a Workforce Solutions scholarship is an initial assessment by career office staff. The assessment must be documented in TWIST Counselor Notes with an explanation supporting suitability for substantial aid and should address the customer's:

- Understanding of the requirements of the chosen occupation, such as; working conditions, hours, wages, physical demand, character qualifications, etc.
- Readiness to enter and complete the training
- Ability to meet scholastic and financial obligations during the training
- Ability to meet any challenges that might prevent success

● Priority of Service

When the supply of Workforce Solutions funds is greater than the demand, financial aid is offered to eligible customers on a first-come, first-served basis. Sometimes the demand for Workforce Solutions financial aid is greater than the supply. When this happens, eligible customers are placed on a wait list⁴ (child care), or registry⁵ (scholarship). The *Workforce Solutions Fund Alert*, issued weekly, notifies staff of the availability of funds for each funding source, and the average time it's currently taking for the Financial Aid Support Center (FASC) to make an eligibility determination for substantial financial aid. Career office staff use this information to advise customers and create a plan to determine the assistance they need.

As funds become available financial aid is offered to customers using priority criteria and the date of application to determine to whom assistance is offered first. Priority criteria applies to the Child Care Development Fund and the Workforce Innovation and Opportunity Act (WIOA).

4 Refer to page 2-55 in this manual for more information.

5 Refer to the Scholarship Registry Desk Aid on wrksolutions.com and in Appendix B of this manual for more information.

Adult		
First	Recipients of public assistance, other low-income individuals; or individuals who are basic skills deficient <i>In this order</i>	1. Eligible veterans and eligible spouses
		2. Foster youth and former foster youth
		3. All other individuals in this group
Second	Individuals at or below the self-sufficiency income levels <i>In this order</i>	1. Eligible veterans and eligible spouses
		2. Foster youth and former foster youth
		3. All other individuals at or below the self-sufficiency income levels
Dislocated Worker		
First	<i>In this order</i>	Eligible veterans and eligible spouses
Second		Foster youth and former foster youth
Third		All other eligible individuals
Youth In-school and Out-of-school		
First	<i>In this order</i>	Eligible veterans and eligible spouses
Second		Foster youth and former foster youth
Third		All other eligible individuals

Note: All forms and applications are available on the Workforce Solutions website at www.wrksolutions.com/StaffResources.

- **High-Skill, High-Growth Occupations**

The occupations on the *High-Skill, High-Growth Occupations* list represent good careers with higher than average wages, skill levels and employment opportunities for the next 10 years.

Staff work to promote these occupations to customers and use the *High-Skill, High-Growth Occupations* list to guide offers of Workforce Solutions' financial aid. Workforce Solutions will provide scholarship support to any occupation on this list, provided the vendor and program is on the Eligible Training Provider List. Access both through www.wrksolutions.com.

- **Eligible Training Provider List (ETPL)**

The program or service that is approved must be listed on the Workforce Solutions ETPL network at www.wrksolutions.com > For Individuals > Training & Education

- **Scholarship Award Limits**

Workforce Solutions scholarships can be used for tuition, fees, books, and supplies. Scholarships are limited to:

- Up to \$3,000 in a 12-month period for basic skills training
- Up to \$6,000 in a 12-month period for occupational skills training
- Up to \$6,000 in a 12-month period for Career Advancement Training

IMPORTANT NOTE: These limits reset each year on October 1.

This does not mean every customer is issued the maximum amount allowed. Providing quality assessment, career counseling, and employment planning services is extremely critical in this process. In addition to the scholarship, support services may be provided to promote the customer's success. Office Managers may allow exceptions to the limitations listed in the chart when there are extraordinary circumstances documented in the customer's employment plan and TWIST Counselor Notes.

Note: There are no exceptions to the restrictions on transportation assistance for SNAP E&T customers.

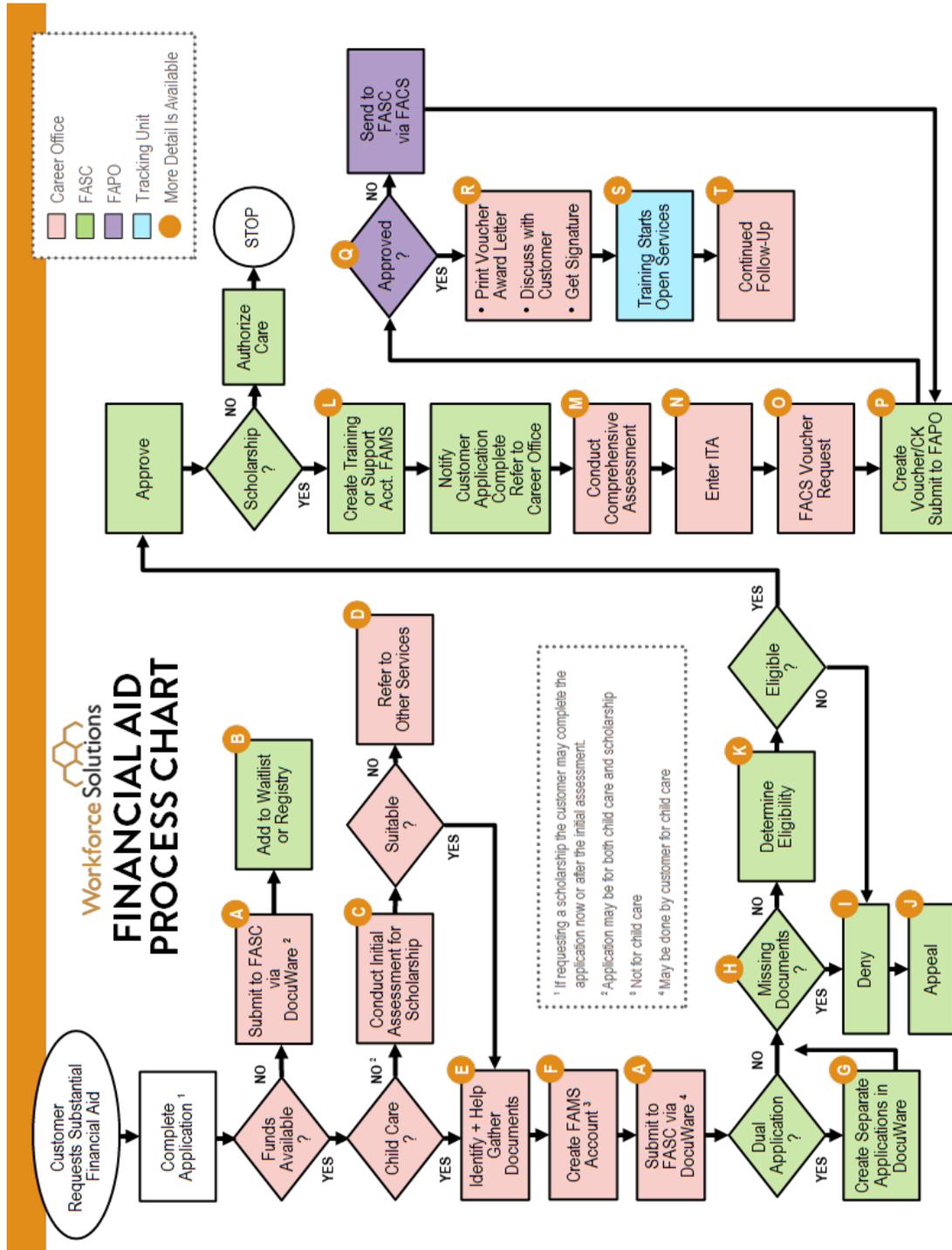
- **Bachelor's Degree**

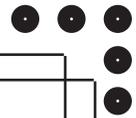
For educational programs that award a bachelor's degree, Workforce Solutions will award scholarships to help finance only the last two years of the program of study.

- **Master's Degree in Nursing**

Individuals officially enrolled full time in program tracks leading to a Master's of Science in Nursing (and committed to teaching at least two years in programs leading to initial RN licensure in a Gulf Coast nursing school upon graduation) are eligible for scholarship support from Workforce Solutions to help finance all courses required to complete their Master's Degree in Nursing.

IMPORTANT NOTE: Trade-affected customers are not subject to these limits.





Fund Sources

The different fund sources have different eligibility criteria and provide a variety of services. It's important to understand which funding supports services the customer needs. When making an eligibility determination, consider all funding for which the customer may be eligible.

There are two types of customers who qualify for Workforce Solutions scholarships:

- Immediately eligible
- Other customers

Immediately Eligible

The following customers are immediately eligible for substantial financial aid without completing a financial aid application:

- TANF/Choices
- Non-Custodial Parent (NCP)
- SNAP E&T
- Trade Adjustment Act (TAA)

TANF/Choices

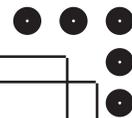
Customers who receive TANF benefits are eligible for substantial financial aid based on their receipt of TANF. Eligibility for TANF is determined by the Health and Human Services Commission (HHSC). A customer must be currently receiving TANF to receive services paid for with TANF funding. Customers receiving TANF are tracked by the Program Tracking Specialists. Verify a customer's eligibility on the TANF History menu option in TWIST. To use TANF/Choices dollars to pay for Workforce Solutions services, the customer must:

- Agree to work, look for work (or participate in work search activities), or attend school a certain number of hours. The number of required participation hours depends on the individual or family situation.
- Report the hours they cooperate. Failure to report the hours and/or failure to cooperate the minimum number of hours makes the customer ineligible to receive services paid for with TANF dollars, including support services such as child care.

Use TANF/Choices funds to pay for:

- Orientation to workforce services
- Employment and training activities
- Support services associated with maintaining cooperation such as:
 - Transportation
 - Work or school-related items like uniforms, tools, or licensing
 - Child care

Refer to the *Workforce Solutions Cooperation Rules* for more information on the requirements for customers receiving TANF/Choices.



Non-Custodial Parent (NCP)/Choices

NCP Choices serves low-income unemployed or underemployed non-custodial parents who are behind on their child support payments and whose children are current or former recipients of public assistance. The goal is to help non-custodial parents overcome substantial barriers to employment and career advancement while becoming economically self-sufficient. Self-sufficiency allows NCPs to make consistent child support payments which may help custodial parents transition off public assistance. NCPs are given the option by a judge to participate in NCP Choices or go to jail. Participation begins with an assessment of needs and barriers and creation of an employment plan designed to move the parent into a stable employment situation.

The services available to non-custodial parents are similar to those available to customers receiving TANF:

- Job referrals and job search assistance
- Support services
- Short-term training
- Subsidized employment/work experience
- Certificate of High School Equivalency/General Educational Development (GED) and English as a Second Language (ESL) classes
- Retention and career advancement assistance

To be eligible for NCP Choices, a non-custodial parent must:

- Have a child support case in which the child and/or custodial parent is a current or former recipient of TANF or Medicaid benefits, and
- Be unemployed or underemployed, and
- Reside in the board area, and
- Be legally able to work in the United States, and
- Have an Office of the Attorney General (OAG)-issued consent order, and
- Be ordered by a court to participate in the program

SNAP E&T

Customers who receive SNAP benefits are eligible for substantial financial aid based on their receipt of SNAP. Eligibility for SNAP is determined by the Health and Human Services Commission (HHSC). A customer must be currently receiving SNAP and participating in SNAP E&T activities to receive SNAP E&T funds. Customers receiving SNAP are tracked by the Program Tracking Specialists. Verify a customer's eligibility on the SNAP History menu option in TWIST. To use SNAP E&T dollars to pay for Workforce Solutions services, the customer must:

- Agree to work, look for work (or participate in work search activities), or attend school a certain number of hours. The number of required participation hours depends on the individual or family situation.
- Report the hours they cooperate. Failure to report the hours and/or failure to cooperate the minimum number of hours makes the customer ineligible to receive services paid for with SNAP E&T dollars.

Allowable activities include:

- Job search
- Unsubsidized employment
- Work experience
- Vocational educational training
- Non-vocational training
- Workfare

Use SNAP E&T funds to pay for:

- Orientation to workforce services
- Employment and training activities
- Expenses associated with cooperation such as:
 - Child care
 - Transportation
 - Work or school-related items like uniforms, tools, or licensing

Refer to the *Workforce Solutions Cooperation Rules* for more information on the requirements for customers receiving SNAP.

IMPORTANT NOTE:

Customers who receive substantial assistance paid for with TANF Applicant, TANF/ Choices, NCP Choices, or SNAP E&T funds, could experience an interruption in financial aid if they lose eligibility for that fund. Explain to customers that completing a Financial Aid Application may help protect them from an interruption by identifying all the sources of financial assistance Workforce Solutions can provide.

TAA

Customers affected by the Trade Act became unemployed as a result of increased imports from, or shifts in production to, foreign countries. Trade affected workers are dislocated workers whose services can be paid for with Trade Act funds. Eligibility for customers who lost their jobs in Texas is determined by TWC, and TWC staff from Austin create the TAA Program Detail in TWIST. To be eligible for TAA funded services, there must be a “Yes” next to all criteria on the “Eligibility Criteria” tab on the Program Detail. If the customer doesn’t have a Program Detail in TWIST, contact the current TAA Coordinator.

To verify a customer’s eligibility to receive services funded with Trade Act funds, refer to the TAA practical guide on www.wrksolutions.com. Services available using Trade Act funds include:

- Training - not limited to occupations on the *WS High-Skill/High-Growth Occupations* list or to vendors on the approved vendor list. Limited to \$25,000 without approval from TWC.
- Job Search Allowance - helps with job search expenses, such as reimbursements for transportation to job interviews outside the normal commuting area (25 miles one-way).
- Relocation Allowance - helps customers relocate within the United States when local work is not available.
- Health Coverage Tax Credit (HCTC) - a federal tax credit that pays 80% of qualified health insurance premiums for eligible individuals and their family.
- Alternative/Reemployment Trade Adjustment Assistance (A/RTAA) provided for individuals over the age of 50 who meet the TAA eligibility requirements. It provides a wage subsidy for up to two years, for workers age 50 and over, to bridge the gap between former and reemployment wages. To qualify, reemployment wages must be less than the former wages.

Customers receiving services through Trade Act are managed at the Career Office by a PSR. The TAA merit staff, located at the FASC, review every customer’s Re-employment Plan (REP), provide guidance to career office staff, and serve as the liaison to TWC staff in Austin.

Individuals Experiencing Homelessness

It's not unusual for customers experiencing homelessness to seek job search assistance at a career office. The Houston and surrounding areas have a significant homeless population, many of whom are anxious to return to work. However, there are often additional challenges to finding and keeping a job when experiencing homelessness. For more information on serving the homeless population take the NWI e-learning course Connecting the Dots.

The Way Home is a collaborative initiative comprised of homeless provider agencies, local government, and other community organizations in Fort Bend, Harris, and Montgomery counties. These organizations develop key strategies to prevent and end homelessness. Workforce Solutions works with The Way Home to provide employment services to customers experiencing homelessness under the Income Now employment initiative.

Employment Counselors provide employment services at The Way Home shelter hub locations, in Fort Bend, Harris, and Montgomery counties. Services are also provided in all Gulf Coast Workforce Solutions offices. The Way Home generates electronic referrals for individuals they work with through its Coordinated Access System and sends these referrals to the Workforce Solutions office closest to the customer in Fort Bend, Harris, or Montgomery counties at the office's group email address (e.g. conroe@wrksolutions.com). When services are provided to customers referred by The Way Home's Coordinated Access, enter a counselor note with the subject line: Income Now Orientation.

Workforce Solutions' services for customers experiencing homelessness is not limited to customers in the counties listed above.

Financial Aid Assistance

Customers experiencing homelessness who are working with a local agency, including, but not limited to, The Way Home, may receive financial aid for job search as referenced in the Financial Aid Limits by Type of Assistance job aid.

They must:

- Complete a Workforce Solutions Financial Aid Application
- Provide documentation to show cooperation with an area shelter, i.e. email from the shelter, letter, referral document, etc.

Note: Customers may have a physical referral form when they enter an office, but staff can check the office's group email, TWIST, DocuWare, or check with their tracking unit to verify the referral from The Way Home's coordinated access system.

- Provide documentation to show eligibility to work in the U.S. (e.g. I9)

Note: Individuals experiencing homelessness may not have all the documents required to support eligibility. If not Career Office staff will:

- Help customers obtain appropriate documents
 - Create a TWIST counselor note explaining the missing documents using the subject line: Missing Documents
 - Add an action item in the customer's TWIST service plan or in the Job Search Map to provide appropriate documents within 90 days. If supporting eligibility documentation is not provided within the 90 days close the customer's TWIST record.
- Scan all documents into DocuWare, regardless of the agency the customer is working with, using the label: Income Now

Request for Financial Aid

The Financial Aid Support Center will:

- Make an eligibility determination and open a program detail, if there is not an existing one
- Open a program detail for the appropriate fund(s) for which the customer qualifies
 - Use the Program Type 11-ES if no other fund applies

Homeless Definition

An individual who:

- Lacks a fixed, regular, and adequate nighttime residence; this includes an individual who:
 - is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason;
 - is living in a motel, hotel, trailer park, or campground due to a lack of alternative adequate accommodations;
 - is living in an emergency or transitional shelter;
 - is abandoned in a hospital; or
 - is awaiting foster care placement;
- Has a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, such as a car, park, abandoned building, bus or train station, airport, or camping ground;

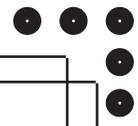
- Is a migratory child who in the preceding 36 months was required to move from one school district to another due to changes in the parent's or parent's spouse's seasonal employment in agriculture, dairy, or fishing work; or
- Is under 18 years of age and absents himself or herself from home or place of legal residence without the permission of his or her family (i.e., runaway youth)

Note:

- This definition does not include an individual imprisoned or detained under an Act of Congress or State law.
- An individual who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as homeless.

Other customers must:

- Work with career office staff to determine suitability
- Complete and submit a Financial Aid Application with supporting documentation,
- Be determined eligible for one or more WS funds such as WIOA.

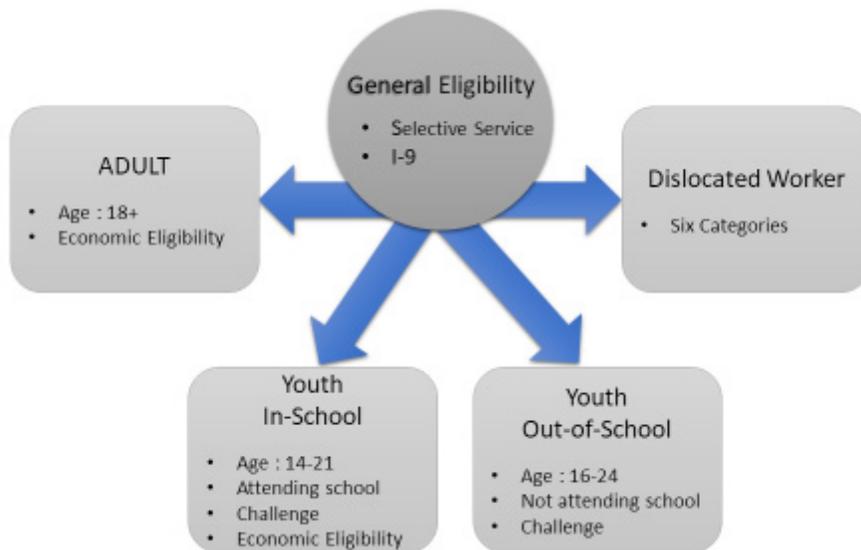


Workforce Innovation and Opportunity Act (WIOA)

The Workforce Innovation and Opportunity Act (WIOA) offers a range of services and activities benefiting employers, job seekers, and communities. The Act focuses on increasing opportunities for individuals with challenges around employment, education, and training; and providing support services needed to succeed at work.

WIOA funds are divided into four fund sources:

- Adult
- Dislocated Worker
- In-School Youth
- Out-of-School Youth



General Eligibility

All customers qualifying for WIOA funding must meet general eligibility requirements:

- Eligible to work in the U.S.: Customers must provide documentation from the I9 checklist to support their Authorization to Work.
- Selective Service Registration: Men born on or after January 1, 1960 must register for Selective Service when they turn 18 and no later than their 26th birthday. Staff must verify registration at www.sss.gov. If a customer has not registered, obtain a written statement from him explaining why he did not register. If you determine he did not knowingly or willfully fail to register, enter a counselor note in TWIST explaining your decision to provide assistance. If he did, inform the customer he is not eligible for WS financial aid and document your decision in a counselor note. For more information about who must register with Selective Service go to www.sss.gov.

Adult

To qualify as a WIOA-Adult, a customer must also meet age and economic eligibility requirements.

- Age: Customers must be age 18 or older.
- Economic eligibility: An individual who meets any **one** of the following criteria satisfies the economic eligibility requirement for Adult funding:
 - Receives or is a member of a family (based on the WIOA definition) who receives:
 - TANF,
 - SNAP,
 - Supplemental Security Income (SSI), or
 - Other public assistance;
 - Received or is a member of a family (based on the WIOA definition) who, in the last six months, received:
 - TANF,
 - SNAP,
 - SSI, or
 - Other public assistance;
 - Is homeless;

- Receives or is eligible to receive a free or reduced-price lunch;
- Is a foster child;
- Is basic skills deficient;
- Receives or is a member of a family who receives an income below the income guidelines;
- Is an individual with a disability whose own income is below the income guidelines even if the individual's family has income above the guidelines.

Refer to the *Workforce Solutions Income Guidelines* for additional guidance.

- **Family Size**

You will need to understand the WIOA family definition when using:

- Income in relation to family size,
- Member of a family receiving, or received in the last six months, TANF, SNAP, or SSI.

The WIOA family definition is:

Two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:

- Two married individuals and dependent children
- A parent or legal guardian and dependent children
- Two married individuals

Additional WIOA Family Size Guidelines

- References to “dependent children” do not include grandchildren, unless the grandparent is the legal guardian.
- Family size is determined based on those individuals meeting the above definition at the time the customer submits the *Workforce Solutions Financial Aid Application*.
- The phrase “living in a single residence” with other family members includes temporary, voluntary residence elsewhere (e.g. attending school or college, or relatives that are visiting). It does not include involuntary temporary residence elsewhere (e.g.. incarceration or placement as a result of a court order).
- When a customer claims (for the purpose of defining his/her family) to be in a common-law marriage, obtain written attestation from both parties affirming the fact.

- A customer's family, as determined consistent with the definition and notes above, may meet more than one category or more than one configuration within a category. In these cases, the determination should be based on which family configuration will most benefit the customer in qualifying for Workforce Solutions Financial Aid.
- An individual with a disability may be considered a family of one if s(he) is a member of a family whose income exceeds the current income guidelines.

- Two or more people
- Related by blood, marriage, court order
- Living in a single residence
- Meet one of the following:
 - Two married people and household dependents
 - A parent or guardian and household dependents
 - Two married people

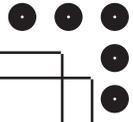
EXAMPLE:

Riley is 25 and has one child, age 3. She has a good job and lives with her parents in their home.

Riley's family size is either two or three.

Riley's family size is two, Riley and her child.

Riley may also be considered in a family of three consisting of herself, and her parents. Her child is not included because her parents are not the child's legal guardians.



EXAMPLE 1:

Kara is a 28 year old single parent with two children. They live with her father and stepmother who both work.

What is Kara's family size? _____

What is Kara's stepmother's family size? _____

EXAMPLE 2:

Donald is 20 years old and lives with his Mom, Dad, and three younger siblings. Donald's Mom and Dad both work and Donald has a part-time job and is going to school.

What is Donald's family size? _____

EXAMPLE 3:

Amy and her three sisters live with their aunt and uncle and their three daughters.

What is Amy's family size? _____

What is her oldest cousin's family size? _____

Calculating Income

Once you have determined the family size, calculate the family's income.

1. Collect proof of income for the last 26 weeks, starting the day before the application date, for every person included in the family. Use the *Family Income Definitions Desk Aid* to determine which income to include/exclude from the calculation.

Use the Income tab in TWIST, or www.timeanddate.com >Calculators>Date Calculators to determine the 26 week income determination period. Document the method you use and all calculations in TWIST Counselor Notes.

- Use gross income totals; not net income.
 - Use only income received in the 26 week period, not income earned, but not received. i.e. look at the pay date, not the pay period on a check stub.
 - Self-employed customers may self-attest income.
 - Keep in mind calculations will differ based on the frequency of pay. Employers typically pay; weekly, every other week, bimonthly, or monthly.
 - For non-self-employed customers, self-attestation is not recommended but can be used as a last resort.
 - Collect the best documentation possible to accurately determine proof of the customer's income for the 26 week period.
 - Explain in TWIST Counselor Notes the methods used, missing documentation, and the decision to accept self-attestation, when appropriate. Use the *Income Reconstruction Worksheet* or the *Self-Certification* form to explain the income without proof.
 - When looking at overall income also consider the reasonableness of the family living on the amount stated.
2. Multiply the amount calculated for the 26 weeks of income by two (2) to calculate the estimated total family yearly income. Keep a record of your calculations in TWIST Counselor Notes.

3. Compare the total family yearly income to the current WIOA Income Guidelines listed in the *WS Financial Aid Income Guidelines - Adult* chart.

- Find the row with the customer's family size. If the income on the chart is greater than the customer's family income, you can use WIOA Adult funds for financial aid. If the income on the chart is less than the customer's family income, you cannot use WIOA Adult funds.

Note: The determination to use the Low-Income or Self-Sufficiency column is made by board staff and communicated to the FASC management. Your supervisor will inform you of which to use.

EXAMPLE:

Nick submitted a financial aid application dated three (3) weeks ago. He worked for the same company until he was laid off eight weeks ago and hasn't worked since. He was paid weekly, but could not find all of his check stubs.

1. The financial aid application should reflect the customer's last day of work. Have the customer explain, on a *Self-certification from or Employment/Income Verification form*, any gaps in employment and missing documentation of income, i.e. check stubs.
2. Since you only have some of the check stubs, you need to estimate the missing earnings by either:
 - taking an average of the checks you have and filling in the missing weeks, or
 - use the YTD totals on the checks you have from the earliest and latest weeks of the 26 week period.

IMPORTANT NOTE:

The YTD method is preferred because it allows you to account for the most accurate estimate of income.

26 week Income Determination Period: _____ to _____

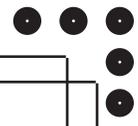
Week	Check Gross	YTD Gross
1	\$982.29	\$1,826.96
5	\$875.41	\$2702.37
6	\$903.87	\$6,428.12
7	\$1,092.29	\$7,520.41
13	\$875.35	\$13,539.65
14	\$835.00	\$14,374.65
15	\$925.31	\$15,299.96
16	\$897.21	\$16,197.17
17	\$951.35	\$17,148.52
18	\$865.35	\$18,013.87

Average

1. Average amount per pay period \$920.34
2. Missing pay periods 8
3. Multiply the average check amount by the number of missing weeks. $\$920.34 \times 8 = \$7,362.72$
4. Add to total of the checks received. This is the estimated gross amount for the 26 weeks .. $\$9,203.43 + \$7,362.74 = \$16,566.15$
5. Multiply the 26 week total by 2 to get Nick's estimated yearly income. Use this to compare to the Adult Income Guidelines to determine if he qualifies for WIOA Adult funds. $\$16,566.17 \times 2 = \$33,132.30$

Use Year-To-Date Totals

1. Subtract the year-to-date total of the first check from the year-to-date total of the last check $\$18,013.87 - \$1,826.96 = \$16,186.91$
2. Add the gross pay amount from the first check to the resulting amount $\$16,186.91 + \$982.29 = \$17,169.20$
3. Multiply the total by two to get a yearly total. Use this to compare to the Adult Income Guidelines to determine if he qualifies for WIOA Adult funds $\$17,169.20 \times 2 = \$34,338.40$



A NOTE TO ILLUSTRATE WHY WE DO THIS:

When you subtract the YTD total of the first check from the last check, the amount of the first check is subtracted too. You have to add it back to include it in the calculation.

Week	Check	YTD
1	\$100	\$200
2	\$100	\$300
3	\$100	\$400
Total	\$300	

Use Number of Weeks Worked

If a customer only provides the last paycheck stub, use the year-to-date total to calculate the average weekly pay.

1. Divide the YTD Gross from the most recent paycheck by the number of weeks worked at the employer this year to get the average weekly pay.
Note: You will need the customer's start date.
2. Multiply the average weekly pay by the number of weeks for which you **do not** have documentation.
3. Add the calculation from number three to the gross pay on the check stub you have.
4. Multiply the total by two to get a yearly income estimate.

NOTE:

You may need to use a variety of methods to reconstruct a customer's income for the twenty-six week period.

EXAMPLE:

Kathy is only able to provide her last pay check stub to show income. She’s worked at the Tasty Treats since last year. Prior to that she did not work. Her application date was August 1.

Pay Date: July 29, 2016
Pay Period: July 16 - July 22
Gross Pay: \$ 575.32
Gross YTD: \$7,523.98

26 week period: January 31 - July 31

Number of weeks Kathy worked for the employer this year: 30

1. Divide the YTD Gross by the
number of weeks worked: $\$7,523.98 \div 30 = \250.79

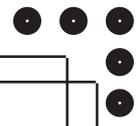
2. Multiply the average weekly pay
by the number of weeks missing
from the 26 week period: $\$250.79 \times 25 = \$6,269.98$

3. Add the income for which
you have proof: $\$6,269.98 + 575.32 = \$6,845.30$

4. Multiply by two for the
estimated yearly income: $\$6,845.30 \times 2 = \$13,690.61$

Collect the best documentation you can to accurately determine which income to include/exclude for the income determination period. In some cases, you can do that with two paychecks. However, documentation of income is generally not a neat, comprehensive list of paychecks. You will have to work with the customer to obtain as much documentation as possible, and then work to reconstruct income for the income determination period or get the information from the employer.

In your efforts to collect “best documentation,” don’t create artificial barriers by demanding documents the applicant says are not available. Make your decision based on the “best documentation” you have.



ACTIVITY: Calculating Income

Jenny submitted a financial aid application dated 3/11/2016 with the following documentation for income:

- She worked at Tip Top Cleaners from 7/25/2015 through 10/31/2015
 - 1 pay stub dated 11/20/2015:

Pay period:	10/31/2015 - 11/13/2015
Hours:	8
Pay rate:	\$15.22/hour
Gross pay:	\$121.76
YTD gross:	\$5,585.74

- She worked at Johnson House Provisions from 11/29/2015 through 2/14/2016
 - Check stub dated 1/1/2016

Pay period:	12/12/2015 - 12/25/2015
Hours:	not provided
Pay rate:	\$15.50/hour
Gross pay:	\$945.50
YTD gross:	\$1,829.00

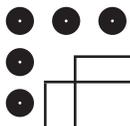
Note: The store was closed from 12/24/2015 - 1/03/2016

- Check stub dated 2/26/2016

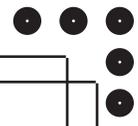
Pay period:	2/06/2016 - 2/19/2016
Hours:	not provided
Pay rate:	\$15.50/hour
Gross pay:	\$75.00
YTD gross:	\$3,441.00

26 weeks: _____ to _____

Calculated income:



NOTES



ACTIVITY: Calculating Gross Yearly Income

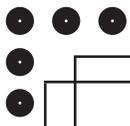
Carolyn has not worked in the last six weeks. What is her estimated gross yearly income?

Use Average check: _____

Use YTD totals: _____

What additional documentation do you need? _____

Week	Check Gross	YTD Gross
1	\$456.52	\$18,620.52
2		
3		
4		
5		
6		
7		
8	\$362.52	\$20,920.52
9	\$349.85	\$21,270.37
10	\$446.35	\$21,716.72
11	\$259.68	\$21,976.40
12	\$268.36	\$22,244.76
13	\$265.44	\$22,510.20
14	\$126.35	\$22,636.55
15	\$653.25	\$23,289.80
16		
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NOTES

Dislocated Worker

Individuals qualify for Workforce Solutions financial aid as a dislocated worker if they are unemployed through no fault of their own or have received an official layoff notice. There is no income test to qualify. Customers must meet the general eligibility requirements, and qualify under one of six sets of criteria:

1. Laid off

There are three ways a customer may qualify under this category:

A. An individual who (must meet all three qualifiers below):

- Has been terminated or laid off, or has received a notice of termination or layoff, from employment; and
- Is eligible for or has exhausted entitlement to unemployment compensation, or can demonstrate an attachment to the workforce. (Has been employed for a period of time, but is not eligible for unemployment compensation due to insufficient earnings or having worked for an employer not covered UI; and
- Is unlikely to return to a previous industry or occupation

Note: Unlikely to return to a previous industry or occupation is determined through an evaluation of the labor market, which determines that:

- The industry or occupation shows either no growth or a decline in available job opportunities as documented by labor market statistics or TWC-approved labor market analyses;
- The individual has been seeking – since termination, layoff, or receipt of notice of layoff – but has been unable to find employment in his or her previous industry or occupation due to economic conditions and/or skill limitations;
- The individual was profiled and determined likely to exhaust UI benefits was called in for an RESEA orientation; or
- There is a lack of suitable matches in WorkInTexas.com.

B. Temporary or Seasonal Workers – Individuals laid off or terminated because of the cyclical, intermittent, or seasonal nature of their employment may be provided individualized career services and training services as a dislocated worker. However, these services should be available only to those customers interested in developing skills in non-seasonal occupations. Individuals laid off on a temporary basis, with a specific recall date, are not eligible under this category.

C. Expedited Eligibility:

- Trade Affected (TAA) eligible

2. Permanent Closure or Substantial Layoff

An individual who:

- has been terminated or laid off, or has received a notice of termination or layoff, as a result of any permanent closure of, or any substantial layoff* or
- is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days.

* Substantial layoff is defined as any reduction-in-force which is not the result of a plant closing and which results in an employment loss at a single site of employment during any 30 day period for at least fifty (50) employees (excluding employees regularly working less than 20 hours per week).

3. Previously Self-employed

The individual was self-employed but is currently unemployed as a result of

- general economic conditions in the community in which the individual resides, or
- because of a natural disaster.

This includes individuals working as independent contractors or consultants but not technically employees of a firm.

4. Displaced homemaker:

An individual who:

- has been providing unpaid services to family members in the home;
- is unemployed or underemployed and experiencing difficulty finding or upgrading employment; and
- meets one of the following:
 - has been dependent on the income of another family member but is no longer supported by that income; or
 - is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the member.

Note: A displaced homemaker may lose support income due to divorce or the death of a spouse. In addition, the loss of support income may be the result of a former wage earner's job loss and that former wage earner may still be living in the home.

5. Spouse of a member of the Armed Forces who:
 - has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member; or
 - is unemployed or underemployed and experiencing difficulty finding or upgrading employment.
6. Former members of the military who were discharged within the previous 48 months and
 - The discharge status is anything other than dishonorable
 - He/she did not retire from the military

In-School Youth

To be eligible for WIOA In-School Youth funding an individual must meet the general eligibility requirements and:

- Age: No younger than 14 and no older than 21 at the time of eligibility determination,
- Attending school: An individual is “attending school” if, on the date of eligibility determination, the individual is:
 - Registered for or enrolled in:
 - Public school
 - Charter school
 - Private school
 - Disciplinary alternative education program (DAEP);
 - Home-schooled;
 - Attending high school equivalency programs, including those considered to be dropout reengagement programs, funded by the public K-12 system;
 - High school graduate who has registered for post-secondary classes, even if not yet attending;
 - Attending post-secondary classes; or
 - In between post-secondary school semesters and has registered for classes for a future semester or has paid all or part of the tuition for a future semester.

Note:

- Once the school status of the individual is determined, that school status remains the same throughout the current participation.
- Participation in the following programs is not considered being “in school” for the purpose of determining ISY/OSY status:
 - Adult education programs provided under Title II of WIOA
 - YouthBuild programs
 - Job Corps programs
 - High School Equivalency programs (not funded by the public K-12 system)
 - Dropout reengagement programs (not funded by the public K-12 system)
- In-School Youth Challenge: Meets one or more of the following:
 - Basic skills deficient
 - An English language learner who is deficient in basic literacy skills
 - An offender
 - A homeless individual
 - A runaway
 - In foster care or has aged out of the foster care system
 - Pregnant or parenting
 - Has a disability
- Economic eligibility: An individual who meets any **one** of the following criteria satisfies the economic eligibility requirement for In-School Youth funding:
 - Receives or is a member of a family (based on the WIOA definition) who receives:
 - TANF,
 - SNAP,
 - Supplemental Security Income (SSI), or
 - Other public assistance
 - Received or is a member of a family (based on the WIOA definition) who, in the last six months, received:
 - TANF,
 - SNAP,
 - SSI, or
 - Other public assistance
 - Is homeless

- Receives or is eligible to receive a free or reduced-price lunch
- Is a foster youth
- Receives or is a member of a family who receives an income below the income guidelines
- An individual with a disability whose own income is below the income guidelines even if the individual's family has income above the guidelines
- Lives in a high-poverty census tract

Refer to the *Workforce Solutions Income Guidelines* for additional guidance.

To determine if a customer lives in a high poverty census tract:

- Use the customer's address and the census website to determine the customer's census tract. Go to: www.census.gov
 - Click on the Data tab
 - Click on Data Tools & Apps
 - Scroll down and click on American Fact Finder (AFF)
 - Click on the Advanced Search tab
 - Click on Geographies on the left navigation bar
 - Click on the Address tab
 - Enter the customer's address. Look under the column Geography Type for Census Tract. The tract number is in the column to the left.

The screenshot shows the American Fact Finder (AFF) website interface. On the left, there are search options including 'Search using...' (Census Tract 5543.01, Harris County, Texas) and 'Search using the options below:' (Topics, Geographies, Race and Ethnic Groups, Industry Codes, EEO Occupation Codes). The main search area is titled 'Select Geographies' and has a search bar with the address '470 Lakewood Forest Drive, Houston, Texas'. Below the search bar, it says 'Geographies containing 13700 Lakewood Forest Dr, HOUSTON, TX, 77070: Select geographies to add to Your Selections'. A table titled 'Geography Results:' shows the following data:

Geography Name	Geography Type
South Region	Region
West South Central Division	Division
Texas	State
Harris County, Texas	County
Northwest Harris CCD, Harris County, Texas	County Subdivision
Block 2008, Block Group 2, Census Tract 5543.02, Harris County, Texas	Block
Census Tract 5543.02, Harris County, Texas	Census Tract

- Refer to the *High Poverty Census Tract Chart* located on wrksolutions.com. If the tract is listed, it's high-poverty. www.wrksolutions.com/staff-resources/performance-improvement/desk-aids

Out-of-School Youth

To be eligible for WIOA Out-of-School Youth funding an individual must meet the general eligibility requirements and:

- Age: No younger than 16 and no older than 24
- School: Not attending compulsory or post-secondary school at the time of enrollment. An individual is “not attending” school if, on the date of eligibility determination, the individual:
 - has had at least 10 consecutive days of unexcused absences and has not returned to school;
 - is not attending a post-secondary school;
 - has not registered for post-secondary school classes; or
 - is enrolled only in non-credit-bearing post-secondary classes.

Note:

- Once the school status of an individual is determined, the school status remains throughout the current participation
- Participation in the following programs is not considered being “in school” for the purpose of determining ISY/OSY status:
 - Adult education programs provided under Title II of WIOA
 - YouthBuild programs
 - Job Corps programs
 - High School Equivalency programs (not funded by the public K-12 system)
 - Dropout reengagement programs (not funded by the public K-12 system)
- Out-of-School Youth Challenge: Meets one or more of the following:
 - School Dropout;
 - Required to attend school but has not attended for at least the most recent complete school year’s calendar quarter (the last three months school was in session)
 - Homeless or Runaway
 - In foster care or aged out of foster care;
 - Pregnant/Parenting
 - Subject to the juvenile or adult justice system
 - Has a disability

Note: A young adult who meets any one of the challenges above does not have to provide proof of economic eligibility.

- Youth who meet the three (3) challenges below:
 - Received HS Diploma/equivalent; **and**
 - Is economically eligible*; **and**
 - Is Deficient in Basic Literacy Skills **or** is an English language learner;
- Is economically eligible and requires additional assistance to complete an educational program, or to secure and hold employment. A customer may qualify with this challenge if he/she:
 - Is a dependent member of single parent family
 - Failed all or part of STAAR test
 - Lacks significant work history (worked less than 3 of the last 12 months)
 - Has been determined by a public or private agency to need help to complete education or get a job
- Economic eligibility: An individual who meets any **one** of the following criteria satisfies the economic eligibility requirement for Out-of-School Youth funding:
 - Receives or is a member of a family (based on the WIOA definition) who receives:
 - TANF,
 - SNAP,
 - Supplemental Security Income (SSI), or
 - Other public assistance
 - Received or is a member of a family (based on the WIOA definition) who, in the last six months, received:
 - TANF,
 - SNAP,
 - SSI, or
 - Other public assistance
 - Is homeless
 - Is a foster youth
 - Receives or is a member of a family who receives an income below the income guidelines
 - Lives in a high-poverty census tract

IMPORTANT NOTE

A TWIST counselor note must support the reason the customer meets the challenge and why (s)he requires additional assistance.

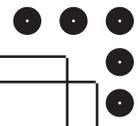
Child Care and Development Funds

Workforce Solutions offers assistance to help customers pay for the costs of child care so they can go to work or school, continue working, and/or get a better job.

There are multiple funding streams associated with child care financial aid. Regardless of the funding stream, once eligibility is determined, the children are eligible to receive child care for 12 months. Child care services continue even if the:

- Customer has a temporary change in family income that does not go over the Sustaining Income on the Workforce Solutions income guidelines (85% State Median Income (SMI))
- Customer experiences a temporary change in circumstances such as:
 - Family or sick leave
 - Student holiday or summer break
 - A reduction in work, training, or education hours, with a plan to return
 - The end of work or training for less than 3 months
- Family moves within the state
- Customer does not:
 - Meet required participation
 - Report a change

Note: Unlike WIOA funds, it is not necessary to assess customers applying only for child care financial aid for suitability.



Priority of Service

Priority criteria applies to Child Care Development Funds based on the hierarchy below:

First Priority <i>In no particular order</i>	TANF Applicants
	TANF/Choices participants
	Former Choices child care recipients whose TANF was denied or voluntarily ended within the last 12-months due to employment, timing out of benefits, or earnings increase. (At-Risk Care)
	SNAP E&T
Second Priority <i>In this order</i>	Parents referred by DFPS
	Qualified veteran/spouse
	Foster youth with children
	Families experiencing homelessness
	Parents on military deployment; military-funded child care is not available
	Teen parents
	Parents with children with disabilities
Third Priority <i>In this order</i>	Siblings in families receiving child care
	Students or employees of a match partner (use Sustaining income levels)
	Parents participating in WS activities who need financial aid to complete
	Families who have lost financial aid for a child based on a program violation, have fulfilled their mandatory waiting period, and have reapplied for financial aid for child care. Violations include: over 40 unexplained absence days or failure to pay the Parent Share of Cost.
	All other eligible customers

Eligible Children

To be eligible for child care assistance at the initial eligibility determination and re-determination each child must:

- Live with the parent, and be physically present in the household in the Gulf Coast region during the time financial aid is requested. *Refer to the VEQ for the definition of parent and in loco parentis and a list of documents to use for verification.*

13 COUNTIES IN THE GULF COAST REGION

- Austin
- Brazoria
- Chambers
- Colorado
- Fort Bend
- Galveston
- Harris
- Liberty
- Matagorda
- Montgomery
- Walker
- Waller
- Wharton

Exceptions:

- Customers experiencing homelessness may use the family's primary sleeping location at the time an eligibility determination is made to determine the county of residence.
 - The child of a parent who is attending school to obtain a post-secondary degree does not have to reside with the parent.
 - The child of deployed military personnel meets the requirement based on the residence of the person standing *in loco parentis* for the child.
 - Children temporarily living with the non-custodial parent during court-ordered visitation meet the residence requirement based on the residence of the non-custodial parent. Depending on the family and child care arrangements for custody arrangements of short duration, child care may continue or be suspended at the agreement of the parents.
- Be U.S. citizens or legal immigrants, and

- Be under the age of 13, or under the age of 19, if disabled or under court supervision. Documentation of the disability is required.

Eligible children with a disability can receive care until they turn 19, or the end of the eligibility period, whichever is later.

IMPORTANT NOTE

Families experiencing homelessness have three months to provide documentation of eligibility for age, citizenship/legal immigration status, and activity hours.

Collaboratives for Children (CfC) provides consultation and training to providers on including children with special needs into child care settings. As a partner organization with CfC, FASC staff is responsible for notifying CfC when child care is authorized for a disabled child so they can follow up with the provider to offer any services necessary for the child. Use the *Disability Interview Form* to gather information about the child's needs. Use the FACS Quick Pick: Child w/Disability to notify CfC when you've authorized care, fax the *Disability Interview Form* to CfC at 713-600-1230, and scan into the customer's file.

Eligible Customers

Customers fall into one of two categories for child care funds: Customers Immediately Eligible and At-Risk Customers.

Immediately Eligible

Customers are automatically eligible for child care financial aid if they are receiving public assistance and cooperating with Workforce Solutions by participating in required activities. This includes:

- **TANF Applicants.** Individuals who have applied for but are not receiving TANF can be awarded child care financial aid upon attending a Workforce Orientation if they agree to begin participating in Choices activities. This is funded as Choices child care. TANF Applicants can also receive child care after receiving a referral from HHSC (2588) to attend a Workforce Orientation if they go to work for a minimum of twenty-five (25) hours per week (50 hours if a two-parent household) before an eligibility determination is made or if they are working at the time of the orientation. This is funded under TANF Applicant care. A customer denied TANF because of her income is no longer considered a TANF Applicant and must apply for At-Risk financial aid.
- **Choices Participants.** Individuals receiving TANF and participating in work search or work readiness activities offered by Workforce Solutions may receive financial aid for child care to meet participation requirements. When a customer is denied TANF she/he may receive child care until the end of the 12-month eligibility period if she is working or going to school for any number of hours. If she/he is not working or going to school when TANF is denied, the customer may receive three months of child care to find work or begin school. If she/he is not in an activity at the end of the three months child care ends.
- **SNAP E&T Participants.** Individuals who are receiving SNAP and engaged in job search services offered by Workforce Solutions may receive financial aid for child to meet participation requirements. Child care is available only for customers classified as General Population who have children age 6 or older.
- **Department of Family and Protective Services (DFPS)/Foster Care Families.** The Texas Department of Family and Protective Services (TDFPS) has the responsibility for determining child care eligibility for children in their protective care, including foster care. The TDFPS case manager contacts Workforce Solutions designated contact at the FASC via email or phone when a family requires child care. The email and Form 2054 received from CPS confirms immediate eligibility.

- **Local Match Contributors** are organizations (typically high schools or community colleges) who offer (pay and provide) child care activities, and in doing so, helps Workforce Solutions draw down federal dollars (match) to pay for more child care activities. Examples of local match contributors include:
 - United Way
 - Public Independent School Districts
 - Community Colleges
 - Four-year Universities
 - City of Houston
- Customers referred through a Local Match Contributor or transitioning from receiving TANF to working receive priority service but are also required to meet all eligibility requirements.
- **Special Projects.** There may be instances where funds become available to serve special populations within the Gulf Coast area. When this occurs, you will receive instructions to ensure correct data entry such as fund coding and eligibility dates.
- **Former Choices.** A former Choices participant who is working or participating in education or training at any level may continue to receive financial aid for child care through the end of the Choices eligibility period, even if participation in Choices has ended.

Once the 12-month eligibility period for child care assistance with Choices funding ends, redetermine eligibility for At-Risk assistance using the Sustaining income levels.

- If the family is:
 - Receiving financial aid for child care at the time of denial they may receive assistance for the remainder of the Choices child care eligibility period.
 - Not receiving financial aid for child care at the time of denial, authorize child care for at least 12 months from the date the assistance is requested.

To authorize child care if the customer is not receiving financial aid for child care at the time of denial:

- Verify the customer's TANF Ineligibility date on the TANF History tab in TWIST. This is the last day the customer received benefits.
- Verify the customer is working and/or attending school by reviewing participation in TWIST, or use another approved method such as requesting paycheck stubs and/or a school schedule..
- Discuss the eligibility requirements to receive financial aid:
 - Be below the Child Care Sustaining Income guidelines based on their family size,
 - Pay a parent fee based on their income and the number of children receiving child care,
 - Report changes that result in income over the Sustaining Income guidelines (85% SMI),
 - Report any permanent loss of work or withdrawal from school, and
 - Self-attest they don't have assets worth one-million dollars or more.

At-Risk (Income Eligible)

Customers who are not automatically eligible may be awarded financial aid for child care if they meet the following criteria at the initial eligibility determination or at re-determination:

- Completed and signed the *Workforce Solutions Financial Aid Application*
- Children meet eligibility requirements listed on page 1-44.
- Meets required activity hours: Working or attending school, or a combination of both, at least 25 hours/week or 50 hours/week if it's a two-parent family.
- Meet income requirements: Income is below designated income levels based on family size (Refer to Workforce Solutions Income Guidelines) or the family is experiencing homelessness.
- Financial assets do not exceed \$1 million.

Note: Customers experiencing homelessness have up to three months to provide documentation for eligibility, but are not required to provide proof of income. Refer to the "Identifying Homelessness" resources on the NWI Learning Management System (LMS) for more information.

MORE INFORMATION ON IDENTIFYING HOMELESSNESS

- Region 10 Education Service Center:
<http://www.region10.org/mckinney-vento-homeless/>
- Local ISD Homeless Education Liaisons:
<https://www.theotx.org/liaison-directory/>
- Texas Education Agency:
http://tea.texas.gov/Texas_Schools/Support_for_At-Risk_Schools_and_Students/Education_of_Homeless_Students/
- Webinar: Determining Eligibility for McKinney-Vento Rights & Services: <https://attendee.gotowebinar.com/recording/4870269533748508930>

Activity Hours

A customer must be working or attending school, or a combination of both, for at least twenty-five (25) hours per week, or a total of 50 hours per week for a two-parent family to meet the eligibility requirements for activity hours. Activity hours must be verified prior to authorizing financial aid.

- A customer who has been hired, but has not started working:
 - must provide documentation from the employer of the hire and the hours expected they are expected to work,
 - can begin receiving child care assistance not more than two weeks prior to his/her scheduled start date.
- Deployed military parents automatically meet the work requirement.
- Customers experiencing homelessness have three months to document activity hours. After the three months, participation for any number of hours allows them to meet requirements.
- A customer can continue to receive financial aid for child care during the 12-month eligibility period if they have a reduction in work hours, a temporary loss of work, or a school break. For a two-parent household any permanent loss of activity for one parent is considered a reduction in hours, provided the other parent continues to participate.

- Customers can request, or staff can offer, to reduce activity hour requirements because a parent has a documented disability or must care for a family member with a disability. Hours can be reduced to not less than fifteen (15) hours for a single parent family and not less than twenty-five hours (25) for a two-parent family.

Calculating Work Hours

To determine if the customer is meeting the activity requirement use the customer's last 13 weeks of paycheck stubs to calculate the average hours per pay period. Use the chart below to compare the average hours worked with the minimum hours based on the pay period to determine if the average hours meet the requirement.

Pay Period	Minimum hours per paycheck (stub)
Weekly	25 hours
Biweekly (every 2 weeks)	50 hours
Semi-monthly (twice a month)	54 hours
Monthly	108 hours

- Calculate the hours worked if the customer's paychecks do not reflect them:
 - If the wage is not indicated on the paycheck (stub), ask the customer for her current wage.
 - Divide the gross pay by the hourly rate of pay. The result is the hours worked for the pay period.
 - Document the calculation in TWIST Counselor Notes.

Use the information you have to determine if the customer is meeting the activity requirement. If the customer's paycheck consistently shows a 25+ hour work week and 1-2 weeks are slightly lower or there are no hours, use the information from the majority of the checks to conclude the customer meets the 25 hour requirement.

EXAMPLE:

Sally provided her last 13 weeks of check stubs. They show she worked 25 hours for eleven of the thirteen weeks, but had no hours for two weeks. The average weekly hours is 21.66, but the expectation is that Sally will work 25 hours per week for the majority of the time.

EXAMPLE:

Sherri makes \$8.00 per hour and is paid every two weeks. She provided you with a check stub showing gross wages of \$436.00.

$$\$436/\$8 = 54.5 \text{ hours worked during the pay period}$$

Since she is paid every two weeks she must work a minimum of 50 hours per pay period. Therefore, this check stub provides proof she meets the criteria.

● Self-employment

For self-employment to be considered an eligible work activity a person must demonstrate they are engaged in an activity for which they receive monetary compensation. To do this customers must provide documentation to verify:

- The existence of the business,
- The business income, and
- Business expenses.

To prove the existence of the business the customer can provide:

- Current property titles, deeds, tax records, or rental agreement for the business
- Recent business bank statement
- Recent business phone, utility, or insurance bill
- Recent state sales tax return
- Business records:
 - Proof of income and expenditures
 - Copies of money orders or checks received and customers served
 - Personal wage records with third party signature
 - Business registration or license

To prove gross income the customer can provide:

- For an established business:
 - IRS form 1040 with schedule C, F, or SE returns, or
 - IRS tax transcript, or
 - Any documents listed for New Self-Employment

- For a new business:
 - Profit/loss statement, or
 - Recent business bank statements, or
 - Business records which document income and expenses

To show net income and calculate hours:

$$\text{Gross Income} - \text{Operating Expenses} = \text{Net Income}$$

Operating expenses may include:

- Rent
- Utilities
- Gas
- Payroll
- Booth rental, etc.

Attending School or Training

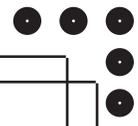
Parents must be attending or enrolled/registered to attend school/training at least 25 hours/week at initial eligibility determination or re-determination to receive child care financial aid. The referral can begin no more than two weeks before school starts. In a two parent household both parents must be working or going to school for a combined total of fifty (50) hours per week. Volunteer hours are not considered in school/training.

Parents in an education/training program may receive financial aid for child care for:

- Up to two (2) years toward a certificate
- Up to four (4) years toward an associate's degree
- Up to six (6) years toward a bachelor's degree
- Up to four (4) years toward a master's degree

These limits begin when the customer is initially determined eligible.

The customer's schedule or a letter from the school or registrar showing start and expected end dates plus hours attending is acceptable proof of training hours. Use the customer's unofficial transcript to determine the number of completed semester hours.



Calculating School Hours

The hours a customer attends school can be calculated using either clock or credit hours.

- **Clock Hours:** Clock hours are used to calculate hours in some programs, such as welding or medical records training. If the customer is attending a training program that uses clock hours then 25 hours equals 25 clock hours of training. Clock hours can also be used for calculating the hours that customers are in clinicals, internships, and student teaching.
- **Credit Hours:** If the customer is attending a program of study that awards credit hours, use the number of credit hours to calculate hours in school. Depending on the course and the school, most classes provide three credit hours. But, you'll need to verify hours to be certain. Some lab courses are only one credit hour, and some independent study courses or internships can provide as many as nine credit hours.

Spring and Fall Semesters

- 1 credit hour = 3 clock hours
Therefore, 12 credit hours = 36 clock hours/week ($12 \times 3 = 36$).
- Customer attending school during the Spring and Fall semesters must carry at least 9 credit hours if they are only attending school.

Summer Sessions/Mini-esters

- 1 credit hour = 6 clock hours
Therefore, 6 credit hours = 36 hours/week ($6 \times 6 = 36$)

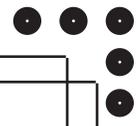
Workforce Solutions Financial Aid: A Blended Learning Course

Course	Credit Hours	Semester	Multiply the number of credit hours x THREE	School Hours
Biology	3	Fall or Spring	3×3	9
Biology Lab	1	Fall or Spring	1×3	3
Independent Study	5	Fall or Spring	5×3	15
TOTAL				27

Course	Credit Hours	Semester	Multiply the number of credit hours x SIX	School Hours
Biology	3	Summer	3×6	18
Biology Lab	1	Summer	1×6	6
Independent Study	5	Summer	5×6	30
TOTAL				54

Course	Credit Hours	Semester	Multiply the number of credit hours x THREE	School Hours
Firefighting Tech	3	Fall or Spring	3×3	9
Ropes & Rescue	3	Fall or Spring	3×3	9
Rescue Lab	2	Fall or Spring	2×3	6
Public Awareness	1	Fall or Spring	1×3	3
TOTAL				27

- A statement from the school registrar showing credit hours enrolled is acceptable proof.
- Using Clock Hours Instead of Credit Hours: The credit hour formula is not intended to limit or minimize school hours - it's simply a way of converting credit hours to actual hours. You may need to use clock hours instead of credit hours to calculate school hours for customers in certain programs of study, such as nursing. Nursing clinicals vary from school to school. Some schools double up clinicals in the first half of a semester; then replace them with something else for the second half. Some clinicals are completed in a simulated setting while others are held in actual medical facilities. Clinicals are always subject to hospital/facility availability. Students are awarded credit hours for clinicals, but very often the time commitment goes beyond the traditional "1 credit hr = 3 hours" formula.



If a customer shows proof of actual hours, use clock hours versus credit hours to determine whether he or she meets the 25 hour/week minimum to qualify. To help you understand the required hours and curriculum of a nursing student, for example, go to the school’s website, and look at the sample curriculum.

For example: A look at the RN program of San Jacinto College shows the post year 1 summer session includes one class which earns 2 credit hours and one clinical which earns 2 credit hours. When we convert these credit hours to clock hours we get a total of 24 hours – falling short of the required 25 hour minimum. We talk to the customer and she agrees to provide proof of her actual clock hours of clinical work. We use the actual clock hours for the clinical and document in TWIST counseling notes how the customer meets the minimum hour requirement.

Course	Clock Hours	Semester	Multiply the number of credit hours x SIX	School Hours
RNSG 2231 Advanced Concepts of Adult Health	2 credit	Summer	2 credit hours × 6	12
RNSG 2260 Clinical Nursing Advanced Concepts of Adult Health	20 clock	Summer		20 clock hours
TOTAL				32

Additional Guidelines: Additional guidelines for customers receiving financial aid for child care - attending school or training include:

- Teen parents (up to age 19 at initial eligibility or redetermination) attending high school or the equivalent are considered to be meeting the weekly requirement
- Online Training: Customers enrolled in a distance learning program or taking online courses included as part of a program's curriculum who needs assistance with child care expenses to participate in the course may qualify for child care financial aid, if:
 - S(he) meets all eligibility requirements, and
 - S(he) provides documentation that verifies her registration in the course and course syllabuses, with a description of the course and online delivery requirements.

Have a conversation with the customer to determine the number of days of care she needs based on the requirements of the course. Create the referral in TWIST and document the conversation in TWIST Counselor Notes.

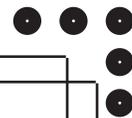
Online courses may or may not follow the credit hours to clock hours formula. In your discussion with the customer be sure to clarify the class expectations.

- Exceptions may be made by a manager or supervisor.
- On occasion, a customer may be training for a company, but not receiving any pay. A letter from the company showing start and expected end dates of the training plus hours attending is acceptable proof.

Income Eligibility (Child Care)

Customers applying for financial aid for child care who are not immediately eligible must qualify based on income eligibility. Family income requirements are:

- Family assets do not exceed \$1 million,
- Family income is at or below the Workforce Solutions initial eligibility income level. There are three steps to determining if a family meets the income qualification:
 1. Determine the family's size,
 2. Calculate the family's monthly gross income,
 3. Compare the family's income based on the family size to the Workforce Solutions Income Guidelines.



Determine Family Size - Child Care

Use the following definition of family to determine the family size for child care financial aid.

Two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:

- Two married individuals and household dependents
- A parent or legal guardian and household dependents

A household dependent is an individual living in the household who is one of the following:

- An adult considered as a dependent of the parent for income tax purposes;
- A child of a teen parent; or
- A child or other minor living in the household who is the responsibility of the parent.

A parent is defined as an individual who is responsible for the care and supervision of a child and is identified as the child's:

- Natural parent
- Adoptive parent
- Stepparent
- Legal guardian
- Person standing *in loco parentis* (in place of a parent).

To stand *in loco parentis* for a child, with no additional documentation required, the customer must meet at least one of the following criteria:

- Choices customers who have children listed on their TANF grant, determined by HHSC.
- Former Choices customers who have children who were listed on their TANF grant, determined by HHSC.
- Customers who have child care authorization from CPS under the Texas Department of Family and Protective Services.

Customers who do not meet these criteria, but who are guardians or custodians, may be eligible for child care financial aid if they provide documentation to support their claims of guardianship. See the In Loco Parentis desk aid in Appendix B for acceptable documentation depending on the circumstances.

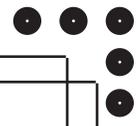
Unless otherwise indicated, the term in loco parentis applies to a single parent or both parents.

Teen Parents: Customers under the age of 20, with children, and attending high school or a GED program are considered teen parents. Teen parent status ends the day before the customer's 20th birthday or the day she graduates from high school or completes her GED program, whichever comes first. Since teen parents may apply for financial aid to assist with child care themselves, or their parent/guardian may apply for them, consider who is applying for the assistance when determining the family size.

EXAMPLE:

Janie is a sixteen year old mom of eight-month old Claire. Janie lives with her mom, dad, and four siblings.

1. If Janie applies for financial aid to assist with child care expenses her family size is two, she and Claire.
2. If Janie's mom applies for child care for her, the family size is eight.



Additional Child Care Family Size Guidelines: Family size is determined based on those individuals meeting the above definition at the time the customer submits the *Workforce Solutions Financial Aid Application*.

EXAMPLE:

Janie is 25 and has a two-year old daughter, Emma. She and Emma live with her Mom, Pat (Emma’s grandmother). Janie has come into the career office for child care assistance.

What is her family size? _____

EXAMPLE 2:

Jeremy and his girlfriend, Jane, have a one-year old boy. They live with Jeremy’s mom and his three younger brothers. Jeremy submitted a WS Financial Aid Application for assistance paying for child care.

What’s Jeremy’s family size? _____

If Jane submitted the application is the family size different? Yes No

Why? _____

Calculate Income - Child Care

Once you have determined the family size, calculate the family's income. Since TWIST stores only the Local Match income level you must manually calculate and test a customer's monthly gross income against the appropriate income guideline when making an eligibility determination.

1. Collect proof of income for up to the last 13 weeks, ending the day before the application date, for all household dependents except dependents aged 14-19 who attend high school or a GED program. Families experiencing homelessness are considered income eligible based on their homeless status, regardless of actual income.
 - Refer to the The Glossary of Terms for Workforce Solutions Financial Aid, TWIST, or the Family Income page of the financial aid application to determine which income to include and exclude from the calculation.
 - Use gross income totals; not net income.
 - Deduct the cost of ongoing medical expenses for a child with a disability from the family's calculated income.
 - Fluctuations in earnings during sustained employment are income amounts that differ due to any of the following:
 - Variable work schedules without an expected number of hours per day or per week for a pay period
 - Overtime pay
 - Pay based solely on commissions or tips
 - Fixed compensation paid in different time periods, as in education
 - Seasonal or temporary employment
 - Calculate the amount of bonuses or incentives to include in the monthly income by dividing the amount by the number of months it was awarded. Add this to the gross monthly estimate.
 - Average an annual bonus by 12
 - Average a onetime or lump-sum payment by 12
 - Average a quarterly bonus by 3

Note: Be sure to remove the bonus from the pay for that check.

Some fluctuations in income are annualized and some are averaged over the three month eligibility determination period. Examples of income that should be annualized may include, but are not limited to:

- Coaching stipend paid only for season
- Accrued vacation leave paid out in a lump sum at year end
- Holiday employment: temporary increase in regular hours or additional employment

Examples of income to average over the three-month eligibility determination period include, but are not limited to:

- Quarterly bonus
 - Overtime pay
 - Variable work schedules
 - Seasonal or temporary employment
- Keep in mind calculations will differ based on the frequency of pay.
 - Employers typically pay; weekly, every other week, bimonthly, or monthly.
 - Explain in TWIST Counselor Notes the methods used, missing documentation, income fluctuations considered, and decisions made regarding calculations.
 - Keep a record of your calculations in Counselor Notes.
 - When a teen parent applies for financial aid themselves their family income is based solely on the teen parent's income and family size. If the teen parent is married, the spouse must be working or attending school/training.

Thirteen weeks of income takes into account irregular fluctuations in earnings and ensures that temporary increases in income, including temporary increases that result in monthly income exceeding the Sustaining Income Guidelines, do not affect eligibility or parent share of cost.

Use the 13 weeks as a guideline to get an estimation of the family's expected income for the 12-month eligibility period. Take into consideration any changes in circumstances. For example; if the customer lost a job during the previous 13 weeks and recently started a new one, collect proof of income only from the current job since it reflects the customer's expected income.

EXAMPLE:

Estelle has worked at a local boutique thirty hours per week for the last seven weeks. Before this job she was laid off from a local grocery store where she had worked for 18 months.

To calculate Estelle's gross wages, request her last seven weeks of check stubs from the local boutique. Since she no longer works at the grocery store the income is not relevant to her expected income during the child care eligibility period.

Self-Employment Income: To verify income for self-employment enterprises, one of the following documents from the most recent tax year and/or most recent quarter, or for new self-employment enterprises, one of the following documents covering a time period within the previous three months is required:

- IRS Form 1040 with IRS Schedule C, F, or SE federal income tax returns
- IRS Tax Transcript
- Statement of profit or loss
- Recent business bank statements
- Business records that document income and expenditures, such as:
 - Lists of and/or invoices for customers served with dates and identifying information (such as addresses)
 - Personal receipt books of business activity and amount
 - Personal payment records with third-party signed verification (such as notary)

Unearned Income: A family member may receive income unearned outside of employment, such as merit-based scholarships, alimony payments, or rental income. If a family member has received countable unearned income within the previous three months, determine the frequency of the income and average accordingly to determine an average monthly amount of unearned income.

2. Calculate the average gross income per pay period.
3. Multiply by the frequency multiplier from the chart below

Multiply by:	If paid:
4.33	Weekly
2.167	Every 2 weeks
2	Twice each month
Other	Specify method in comments

4. Add all family member's income and compare the total family monthly income to the current *WS Financial Aid Income Guidelines*.
 - Use the Child Care chart in the *WS Financial Aid Income Guidelines*.
 - Find the row with the customer's family size.
 - Compare to the Initial Eligibility column at the initial eligibility determination.
 - Compare to the Sustaining Eligibility column at redetermination or if determining eligibility for former Choices customers.
 - If the income on the chart is greater than the customer's family income, the customer is eligible for WS financial aid. If the income on the chart is less than the customer's family income, the customer is not eligible. Only process applications for customers whose income falls at or below the Initial eligibility level.
 - Refer to the *Workforce Solutions Fund Alert* to determine if funds are available.

EXAMPLE:

Keith is a single parent who has applied for WS financial aid to assist with child care for his two daughters. He worked for the same company for the last year where he was paid every other week. His application date is November 4, 2016.

- The financial aid application should reflect the customer's last day of work and should explain any gaps in employment and missing documentation of income, i.e. check stubs.
- Since you only have some of the check stubs, you need to estimate the missing earnings by either:
 - Taking an average of the checks you have and filling in the missing weeks, or
 - Using the YTD totals on the checks you have to calculate the total gross pay.

Week Check Gross YTD Gross

<i>Pay Period Start</i>	<i>Pay Period End</i>	<i>Pay Date</i>	<i>Pay</i>	<i>YTD</i>
7/15/2016	7/28/2016	8/5/2016	\$654.95	\$6,818.78
7/29/2016	8/11/2016	8/19/2016	\$896.45	\$7,715.23
8/12/2016	8/25/2016	9/2/2016	\$1,124.32	\$8,839.55
8/26/2016	9/8/2016	9/16/2016	\$1,224.65	\$10,064.20
9/9/2016	9/22/2016	9/30/2016	\$1,278.65	\$11,342.85
9/23/2016	10/6/2016	10/14/2016	\$1,198.56	\$12,541.41
10/7/2016	10/20/2016	10/28/2016	\$1,023.56	\$13,564.97

Average

5. Average amount per pay period\$1,057.31
6. Multiply the average check amount by frequency multiplier (2.167)
 $\$1,057.31 \times 2.167 = \$2,291.19$

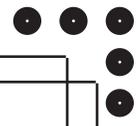
Use this to compare to the WS Income Guidelines to determine if he qualifies

Use Year-To-Date Totals

Use Year-to-date-pay to calculate the average amount per pay period.

1. Subtract the year-to-date total of the earliest check from the year-to-date total of the most recent check $\$13,564.97 - \$6,818.78 = \$6,746.19$
2. Add back the gross pay from the earliest check $\$6,746.19 + \$654.95 = \$7,401.14$
3. Divide by the number of pay checks/periods $\$7,401.14 \div 7 = \$1,057.30$
4. Multiply the total by the frequency multiplier (2.167) $\$1,057.30 \times 2.167 = \$2,291.16$

Use this to compare to the WS Income Guidelines



A NOTE TO ILLUSTRATE THIS CONCEPT:

When you subtract the YTD total of the first check from the last check, the amount of the first check is also subtracted. You have to add it back to include it in the calculation.

<i>Week</i>	<i>Check</i>	<i>YTD</i>
1	\$100	\$200
2	\$100	\$300
3	\$100	\$400

Add Checks $\$100 + \$100 + \$100 = \300

YTD most recent - YTD earliest: $\$400 - \$200 = \$200$

Add back in the earliest check amount: $\$200 + \$100 = \$300$

Use the Number of Weeks Worked

If a customer only provides the most recent paycheck stub, use the year-to-date total to calculate the average weekly pay.

1. Divide the YTD Gross from the most recent paycheck by the number of weeks worked at the employer this year to get the average weekly pay.

Note: You will need the customer's start date.

2. Multiply the average weekly pay by the frequency multiplier (4.33) to calculate estimated

EXAMPLE:

Kathy is only able to provide her last pay check stub to show income. She's worked at the Tasty Treats since last year. Prior to that she did not work.

Her application date was August 1.

Pay Date: July 29, 2016

Pay Period: July 16 - July 22

Gross Pay: \$ 575.32

Gross YTD: \$7,523.98

13 week period: May 5 - July 31

Number of weeks Kathy worked for the employer this year: 30

Calculate the average weekly gross wages.

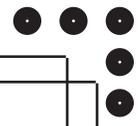
1. Divide the YTD Gross by the number of weeks worked

..... $\$7,523.98 \div 30 = \250.79

2. Multiply the average weekly pay by the frequency multiplier

..... $\$250.79 \times 4.33 = \$1,085.92$

Use this amount to compare to the WS Income Guidelines



ACTIVITY: Calculating Incomes

- John has a new job and is paid weekly. He has not received his first paycheck. The Employment/Income Verification Form says John will work 36 hours/week and receive \$8/hour.

Calculate John's income:

- Janie works two jobs. She's worked on a construction crew for the last two years and just recently started working at a local boutique. She gets paid every other week at her construction job and weekly at her new job, for which she only has only receive one check.

<i>Job</i>	<i>Pay Date</i>	<i>Amount</i>
Construction	June 3	\$540
	June 17	\$540
	July 1	\$540
	July 15	\$540
	July 29	\$540
	August 12	\$495
	August 26	\$540
Boutique	August 15	\$150

Calculate Janie's income:

3. Emily has been at the same job for the last year. She is paid twice a month and brought you six check stubs. Her February 15th check includes a \$250 yearly bonus.

<i>Pay Date</i>	<i>Amount</i>
January 1	\$400
January 15	\$440
February 1	\$420
February 15	\$650
March 1	\$400
March 15	\$450

Calculate Emily's income:

4. Cedric has worked at a commission-only job for the last six months where he is paid twice a month. His January 15 pay stub shows no earnings for the pay period.

<i>Pay Date</i>	<i>Amount</i>
January 1	\$600
January 15	\$0
February 1	\$675
February 15	\$700
March 1	\$585
March 15	\$1,000

Calculate Cedric's income:

Child Care Providers

There are two kinds of child care providers – Regulated and Unregulated.

- Regulated vendors are licensed or registered with the state and include:
 - Licensed Child Care Centers – A child care facility that provides care for 13 or more children under the age of 14, authorized to operate by the Texas Department of Family and Protective Services (TDFPS). A licensed facility must comply with the minimum standards and rules for licensed child care centers required by TDFPS and is subject to regular monitoring by TDFPS.
 - Licensed Child Care Homes – A child care facility that provides care for no more than 12 children under the age of 14, authorized to operate by the Texas Department of Family and Protective Services (TDFPS). A group day home must comply with the minimum standards and rules for licensed child care centers required by TDFPS and is subject to regular monitoring by TDFPS.
 - Registered Child Care Homes – A home in which the caregiver lives and takes care of no more than six children under the age of 6, plus no more than six additional school-age children. The total number of children, counting the caregiver’s own children, may not be more than 12 at any time. It is authorized to operate by TDFPS and must comply with minimum standards and guidelines of TDFPS. These homes may be monitored by TDFPS as needed.
 - Other Regulated Providers
 - Providers licensed by the Texas Department of State Health Services
 - Facilities operated and monitored by the United States Military Services
 - Texas Rising Star (TRS) Certification Program – Some providers have the TRS designation. A TRS certified provider exceeds minimum state licensing standards, has smaller group sizes, more qualified staff, and program components that address sound practices for the development of children. Parents are encouraged to inquire whether a chosen provider is TRS certified.

IMPORTANT NOTE:

A TRS certified provider is the first placement of choice for CPS placements. Customers who reside in an area without a TRS provider may request a waiver from CPS.

If the customer chooses a regulated provider, look for the provider on the list of Workforce Solutions' Network Providers. If the provider is not listed, or if the provider is inactive* in the system, submit a request to the Financial Aid Payment Office (FAPO), using the Financial Aid Communication System (FACS), to add the provider to the vendor network. You must provide the FAPO with the following information:

- Name
- Address
- Telephone number
- Contact person

If the provider is in the system but has no vacancies, the parent must choose another provider.

* If no rates are listed in TWIST, this is an indication that the provider is inactive. If group size and capacity are zero, this indicates the provider cannot accept children.

- Unregulated Providers or Relative Vendors are eligible relatives of the child who:
 - Are a grandparent, great-grandparent, uncle, aunt, or sibling of the child over 18,
 - Are not living in the household,
 - Have a certification of relationship form signed by the parent,
 - Are Registered with, and maintain their listing status with, the Texas Department of Family and Protective Services (TDFPS),
 - Are authorized and listed as a provider with FAPO.

Note: The child of a teen parent can use a relative who lives in the household.

Unregulated providers must be authorized and listed as a provider with FAPO and register with the TDFPS before receiving payment for services. This takes about six to eight weeks, so the customer may want to consider using a regulated provider while waiting for the family member to become registered.

FAPO is responsible for processing and authorizing unregulated providers. Authorization for child care financial aid and payments to the relative caregiver will not begin until FAPO receives the required documentation from the unregulated provider and verifies the provider has registered with TDFPS.

Give customers requesting unregulated providers (relative) the Relative Provider Customer Handout, and instruct them to contact the Financial Aid Payment Office at 1-888-469-5627 (JOBS), select option #3, then option #2. FAPO staff will:

- Explain the process
- Estimate the time for beginning payment
- Answer questions
- Mail the Relative Provider Packet to the customer

Note: TDFPS-listed relative providers must be updated yearly.

Share of Cost

Working customers who receive WS financial aid for child care are required to pay a share of the cost of care to the vendor. This share of cost is assessed using a sliding scale based on the customer's family size and income at the initial eligibility determination, or re-determination. Before awarding financial aid discuss the share of cost requirement with the customer and give her an idea of what her portion will be. Parents exempt from paying a Share of Cost include parents:

- Participating in Choices or SNAP E&T
- Experiencing homelessness
- Receiving DFPS child care, unless assessed by DFPS

The Share of Cost can only be assessed:

- At initial eligibility determination
- At eligibility redetermination
- When adding a child
- When a parent reports a change in income, family size, or number of children in care that would result in a reduced Parent Share of Cost
- When resuming work, job training, or education activities following a temporary change or during the three-month continuation of care period that would result in a reduced Parent Share of Cost.

To determine the customer's payment amount:

- Locate the Parent Share of Cost amounts in TWIST under the WDA Administration menu.
- Find the customer's household size and income range in the chart.
- At the top of the column is the share of cost amounts for the first child and additional child(ren). These are the amounts TWIST uses in the System Calculations and attaches to the provider.
- Apply applicable discounts, see below.
- Enter adjusted amounts in TWIST. Refer to page 2-109 in this manual for how to enter the Parent's Share of Cost in TWIST.

Notes:

- If, using the sliding scale, the parent's payment is determined to be \$0, the customer will not be assessed a share of the cost.
- If a child is added or removed from care after a Board-to-Board transfer, the Share of Cost amount is based on the sliding scale, but cannot go above the amount initially assessed by the previous Board.
- A teen's share of cost is based solely on the teen parent's income and family size.

Discount

Workforce Solutions authorizes a discount to the Parent Share of Cost if a customer selects, is accepted, and continues care at a Texas Rising Star (TRS) certified provider. The discount is:

- 40% for the first year
- 20 % for the second year
- No discount for additional years

Use following formula to apply this discount:

- System Calculation x discount percent (.40 or .20) = discount amount
- System Calculation - discount amount = Parent Share of Cost

These discounts apply even if the provider loses TRS certification or the parent moves or changes employment within the workforce area and no TRS-certified providers are available to meet the needs of the parent's changed circumstances.

IMPORTANT NOTE:

A customer's Share of Cost can be reduced during the 12-month eligibility period due to a change in circumstances. The Share of Cost can be increased during the 12-month eligibility period only as high as initially assessed, unless an additional child receives child care services, at which point the parent's Share of Cost can be raised above the initial determined rate.

All changes to the parent's Share of Cost must be manually entered in TWIST.

Customers who use multiple providers may select one provider to pay the Share of Cost. Adjust the amount to pay providers on the Share of Cost tab in TWIST.

You can adjust the Share of Cost amount for future months for customers experiencing difficult situations which make it difficult for them to meet their Share of Cost obligation. Such as:

- Unemployment and seeking employment
- Interruption in service
- Large unexpected expense.

The Share of Cost amount can not be reduced to \$0. Notify the provider and document your actions and justification in TWIST Counselor Notes.

Payment of the Share of Cost is a transaction between the customer and the vendor. When the customer doesn't pay the Share of Cost the vendor may refuse to accept the child and has until the last working day of the month it's due to report the non-payment to Workforce Solutions. The customer can not transfer the child to another vendor unless the parent has paid the parent share of cost to the current vendor, unless the transfer is related to a health and safety concern for the child.

Attempt to contact the customer via multiple channels to notify him/her of the possibility of child care being stopped due to failure to pay. Also evaluate the customer's situation by the 10th calendar day of the following month to determine the appropriate action:

- Temporarily adjust the Share of Cost
- Terminate financial aid for child care

If the action is termination:

- Notify the vendor and the customer of the termination
- Include access to the appeals process in the customer notification. Note: Workforce Solutions does not pay for child care when it's been terminated for failure to pay the Share of Cost.
- The customer must wait a minimum of sixty (60) days to reapply for child care and is placed at the end of the wait-list.

Staff must track all early terminations of financial aid for child care due to failure to pay the Parent Share of Cost, including family size, income, family circumstances, and the reason for the termination so Workforce Solutions can determine if there is a pattern of frequent early terminations and possibly take future actions.

Required Documentation

- ✓ *Workforce Solutions Financial Aid Application*
- ✓ Signed *Orientation to Complaint* form
- ✓ Proof of income
- ✓ Proof of work (Pay check stubs or statement from employer) and/or school hours (unofficial transcript and school schedule)
- ✓ Proof of children's citizenship
- ✓ Signed Parent Agreement
- ✓ Proof of residency in the 13-county region
- ✓ Self-attestation of less than one million dollars in assets

Child Care Financial Aid Wait List

Sometimes the demand for Workforce Solutions child care funds is greater than the supply. When this occurs, you will need to put the customer on the Child Care Financial Aid wait list after you check for potential eligibility and priority service.

To check for potential eligibility, use the information the customer provides to confirm:

- The parent resides in the 13-county Gulf Coast region,
- The parent is working or in school,
- The children are between the ages of 0 and 13, 0-19 if special circumstances apply,
- The children are U.S. citizens or legal residents.

Check to see if the children are in a priority group. Refer to page 1-43 for priority of service information.

If you determine a customer is potentially eligible, and has satisfied mandatory wait time related to a failure to pay the Parent Share of Cost, due to excessive absences, or mandatory recruitments, if applicable.:

- Add the customer to the wait list. *Refer to page 2-55 in this manual for further instructions.*
- Send a copy of the wait list letter that tells customers:
 - Funds are not immediately available and we are placing them on the wait list,
 - Approximately how long it may take before we can provide assistance,
 - (S)he will remain on the wait list until we reach out,
 - We will send notification when funds become available,
 - It is their responsibility to update changes to contact information, telephone number, email address, mailing/residence address.

Exceptions may be approved by a manager or designee, on a case-by-case basis.

Continued Financial Aid

Regardless of the funding stream, once eligibility is determined, children are eligible for care for 12 months from the date of the first referral plus the additional days necessary to end eligibility on the last day of the month. We ask customers to let us know when they have a change in circumstances that may affect their eligibility or share of cost. For example a change in:

- Family income
- Number of people in the family
- Employment
- Education/training hours

They must report within fourteen (14) calendar days:

- Family income increases to above 85% State Median Income level for the family size (Sustaining Income Limits),
- Permanent interruption in work, training, or participation

If a family experiences a permanent change in income, which makes it higher than the Sustaining Income on the Workforce Solutions income guidelines (85% SMI), send a *Notice to Stop Care Letter* and stop care after the allowed fifteen days.

IMPORTANT NOTE:

This does not apply to customers who continue to experience homelessness.

If a family experiences a permanent loss of employment or education but has a plan to return they may receive three months of continued child care to find employment or enroll in school. If during the three months, the customer reports employment or school attendance for any number of hours, continue care for the remainder of the eligibility period.

IMPORTANT NOTE:

Three months is a guideline which may be extended, within reason. For example; if a customer drops all classes for the fall semester in September and is scheduled to begin school again at the end of January, the child may continue to receive care during the break in school.

For any change reported:

- Review the information to determine if the change affect the customer's eligibility or Share of Cost
- Update the Intake Common information in TWIST
- Document actions in TWIST Counselor Notes

You may also need to:

- Follow the process to deny or discontinue financial aid
- Reduce the Share of Cost. Explain in a counselor note the reason for and the duration of the temporary reduction and notify the customer and the vendor of the change.
- Add or remove children in care, adjust Share of Cost accordingly, and notify customer and vendor of the change.

If a child's care-giver changes permanently, such as in the event of a parent's death or incarceration that will last longer than three months, the child's eligibility and care continues until the end of the 12-month eligibility period if :

The child's new care-giver's family income is below 85 percent of SMI (Sustaining Income levels) **AND** the caregiver is participating in work, education or training at any level

Attendance

Customers are responsible for ensuring their children attend the child care provider on a regular basis and must use the Child Care Attendance Automation (CCAA) card to report attendance and absences daily:

- At a Point of Service (POS) machine or
- Through an Interactive Voice Response (IVR) telephone system

Customers can choose up to three individuals as secondary cardholders to report attendance and absences when the customer is not available. Secondary cardholders must be age 16 or older, unless the individual is a parent of the child, and cannot be the owner, assistant director, or director of the child care facility.

IMPORTANT NOTE:

Giving the CCAA card or the personal identification number (PIN) to an individual other than the parent or secondary cardholder, is grounds for a termination.

Customers must report a lost card to the Financial Aid Support Center within seven calendar days. The Support Center will issue replacement cards and may adjust the child's attendance up to twenty one (21) days, as needed, due to the lost card. Any problems recording attendance must also be reported to the Support Center to avoid accruing absences.

Failure to meet attendance standards results in a program violation for financial aid for child care funded by At-Risk, Choices, Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T), and former Texas Department of Family and Protective Services (DFPS) funds. Attendance standards are established based on when the eligibility period begins:

- If the 12-month eligibility period begins before August 1, 2018 - a child may not exceed 65 total absences, by the end of the 12-month eligibility period. A program violation results in the loss of the child's eligibility for financial aid for 60 days from the effective end date of the 12-month eligibility period.
- If the 12-month eligibility period begins on or after August 1, 2018 - a child may not exceed 40 unexplained total absences during a 12-month eligibility period. When a child exceeds 40 absences within a 12-month eligibility period, the Support Center notifies the parent and the child care provider of the referral end date. A program violation results in the loss of the child's eligibility for financial aid for 60 days from withdrawal of authorization.

The Financial Aid Support Center notifies parents and the provider of the potential termination of child care assistance via mail when a child accrues 15 and 30 general absences cumulatively within a 12-month eligibility period.

A child's documented chronic illness, disability, or court-ordered visitation are not included in the absence limit.

IMPORTANT NOTE:

Workforce Solutions does not pay for child care services during an appeal when services are ended due to excessive unexplained absences.

- End the referral or terminate the child care program detail in TWIST using the termination reason Excessive Unexplained Absences, notify the customer, and provide access to the appeals process.
- After the 60-day penalty period the parent may reapply for financial aid for child care.

The 60-day penalty period doesn't apply to Choices customers who require child care to participate or demonstrate participation, if sanctioned, during the 60-day penalty period.

Staff may reduce the number of absences reported on a child's attendance record per the parent or care-taker's request based on the following limits:

- The parent lost the automated attendance card
 - Up to 21 absences
- The parent did not receive the automated attendance card
 - Up to 21 absences
- The provider had a defective attendance terminal
 - Up to 21 absences
- The parent's attempt to record attendance in CCAA is denied or rejected and cannot be corrected at the provider site
- The Texas Department of Families and Protective Services is authorizing the referral for General Protective Services supported financial aid for child care
- There is an extraordinary extenuating circumstance that prevented a parent from recording attendance. The extraordinary extenuating circumstance must be approved by supervisor and recorded in TWIST Counselor Notes.

Workforce Solutions staff must always provide the justification for adjusting the absence count in TWIST Counselor Notes.

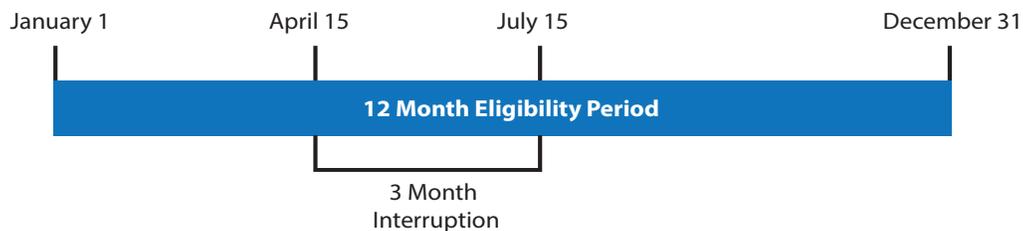
DFPS General Protective Care Attendance Standards

Children receiving care under a DFPS General Protective Care are not subject to the above attendance standard. Support Center staff coordinate with DFPS and the child’s caregiver to encourage attendance. If you cannot reach the customer after repeated contact attempts, or the customer is not communicating with the provider or taking the child to care:

- End the child care referral after 30 calendar days of no contact
- Leave the child’s eligibility and Program Detail open.
- Contact the DFPS regional day care coordinator to ensure that DFPS is aware that the child is not attending before taking action to end the referral.
- Document the reason for the terminating the referral in TWIST Counselor Notes.

Interruption of Service

If a customer experiences a permanent loss of work, training, or education participation, the family’s child care continues for a minimum of three months to allow the parent to find work or go back to school. If during the three months the customer goes back to work or school for any number of hours continue child care until the end of the eligibility period. If the customer does not return to work or school in the three month period send a *Notice to Stop Care* letter fifteen days before the end of the interruption period and end care at the end of the three months. Refer to Module two: Creating and Updating the Customer Record for how to record the interruption in TWIST.



Suspensions

Customers may have interruptions, both planned and unexpected, in work and school/training. While customers aren't required to report changes that do not effect eligibility, they may require a suspension of services to avoid excessive absences. Suspensions may last up to three months, as a general rule, or longer under special circumstances.

Example:

If a customer is unable to register for classes for a semester but plans to attend school the following semester, you can suspend care for the four months the customer waits to attend school.

The customer's eligibility for financial aid doesn't change during the suspension, only the need for it. When customer returns to school or work within the time allowed for the suspension, they don't have to reapply for financial aid, or be placed on a wait list unless the eligibility period ends during the suspension. However, the provider is not required to hold a place for the child. Encourage your customer to talk with the provider about the child's return.

Prior to any suspension of child care, customers must provide documentation that indicates they intend to return to work or school. Appropriate documentation includes:

- Written statement from the employer or training provider stating the parent will be returning to work or job training activities following the temporary interruption of these activities or medical incapacitation; or
- Written notification of the parent's intent to enroll in an educational institution following the temporary interruption of educational activities

When customers notify you they have returned to work or school, authorize financial aid for child care by creating a new referral on the child care Program Detail in TWIST. After returning from a suspension, normal rules apply, and a customer must report any relevant changes within 14 days.

Determine Eligibility for Continued Financial Aid

Customers are eligible for financial aid for child care assistance for 12 months, at which time a re-determination of eligibility must be made. Support Center staff send customers whose eligibility is about to expire a Notice to Re-certify letter forty-five days before the end of the eligibility period. This letter includes a Re-determination Application and a list of documents that must be submitted to the FASC for eligibility to be reviewed for the next 12 months. Documentation must be returned within ten days from the date of the letter. Use the Re-determination Application and documents to make an eligibility determination. For customer's to continue to receive care:

- The family's income must be below 85% of the state median income (Sustaining) or the customer continues to be eligible for assistance under one of the other eligibility criteria
- Parents must meet activity requirements
If a parent is meeting the activity hour requirements by attending school:
 - The parent must demonstrate progress in the education/training program by showing he or she is currently enrolled in an education/training program. The education/training institution's acceptance of the parent as a student is considered proof the parent is making successful progress in the education/training program. A parent's progress toward completion of the education or job training program must be based only on the parent's performance while receiving child care
 - The customer cannot have exceeded the time limits to receive assistance for child care.

Note: If, at eligibility redetermination, the family is experiencing a temporary change in work, education, or training, extend the eligibility period to the date the parent is expected to return to work, school, or training. This extension is granted on a case-by-case basis. Document the extension in TWIST Counselor Notes.

- The child must reside in the 13-county Gulf Coast region
- The child must be under 13 years of age or 19 years of age if special circumstances apply
- There must not be a program violation for excessive absences or failure to pay Parent Share of Cost that may apply at redetermination of eligibility
- Parents must not have a current, open requirement to repay disallowed costs.

When the customer is determined eligible to continue to receive financial aid:

- Review the information in TWIST and make changes as necessary. (Refer to Creating the Customer Record for more details on how to record changes in TWIST.)
- Estimate the parent's share of cost using TWIST and The Parent Share of Cost desk aid.
- Notify the customer of eligibility determination, and notify the provider to begin or end care.

The new eligibility period and referral begins the first date of the month following the end of the 12-month eligibility period and end 12 months later, on the last day of the month.

Deny/Discontinue Financial Aid

Deny the customer's request for financial aid if you:

- Determine a customer is ineligible for WS financial aid.
- Are unable to complete eligibility determination because the customer did not provide the documents or information requested in the time allowed.

Discontinue or end financial aid for child care when the customer becomes ineligible due to:

- failure to fulfill a requirement or condition of receiving financial aid,
- the planned time for the financial aid ends.

Send the *Deny Financial Aid* letter, edited with the customer's information, and the appropriate appeal form found on the *Reasons to Deny* chart, by U.S. Mail to a customer when financial aid is denied or discontinued. This letter:

- Tells the customer why financial aid has been denied/discontinued,
- Provides the customer with the steps necessary to appeal the decision; and
- Includes the appeal form appropriate to that customer's situation.

When Workforce Solutions determines a customer committed fraud (an attempt to obtain or increase a benefit or other payment, either for the individual or another individual, by making a false statement or representation or failing to disclose a material fact, knowing it to be false), the parent is not eligible to reapply for child care financial aid or be placed on the wait list for 12 months from:

- The date the recoupment is completely paid
- The date of the determination of fraud or
- The last day of care; whichever is later.

Appeal

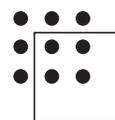
A customer may appeal the decision to deny, reduce, or discontinue financial aid or set a recoupment amount by following the complaint processing standards and guidelines, found in WS Issuance 18-16 if the customer's appeal is denied, take steps to stop financial aid and recover the financial aid the parent received during the appeal process.

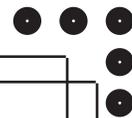
All services provided to a customer must be recorded in TWIST Service Tracking (except child care) and Counselor Notes.

IMPORTANT NOTE:

Workforce Solutions will not pay for child care during an appeal when we discontinued financial aid because of excessive absences or failure to pay the Parent Share of Cost.

CREATING AND UPDATING THE CUSTOMER RECORD





CREATING AND UPDATING THE CUSTOMER RECORD - TWIST

Introduction

At some point during the financial aid process, you will create or update the electronic customer record in TWIST to document the customer's information. TWIST is a component of the Workforce Solutions Management Information System (MIS) used to collect and process customer information. The MIS populates the same customer information in multiple programs and allows you to perform tasks such as creating customer records, making job referrals, and entering financial aid information. You will use TWIST to:

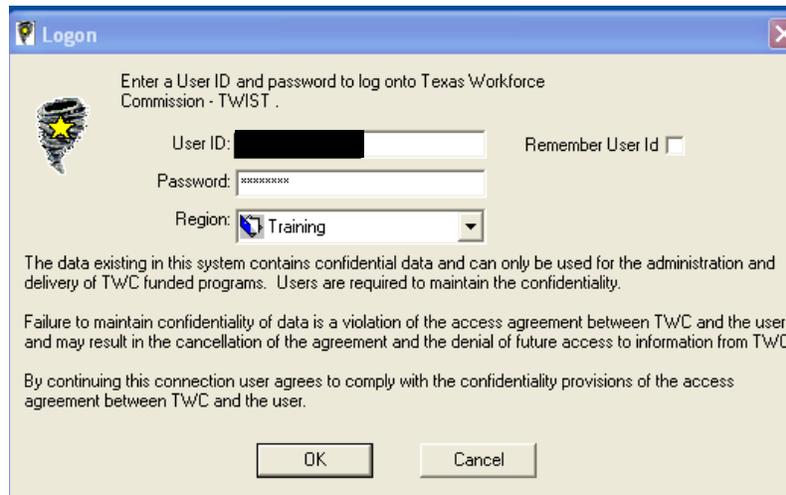
- Verify eligibility for financial aid
- Verify benefits and cooperation
- Enter and check employment plans
- Add support services and assessment information
- Enter counselor notes
- Place customers on the waitlist for child care
- Calculate the parent's share of cost
- Create 2450s and make referrals
- Adjust child care attendance records

TWIST Basics: A Blended Learning Course



**The
Workforce
Information
System of
Texas**

Login to TWIST



Logon

Enter a User ID and password to log onto Texas Workforce Commission - TWIST .

User ID: Remember User Id

Password:

Region:

The data existing in this system contains confidential data and can only be used for the administration and delivery of TWC funded programs. Users are required to maintain the confidentiality.

Failure to maintain confidentiality of data is a violation of the access agreement between TWC and the user and may result in the cancellation of the agreement and the denial of future access to information from TWC.

By continuing this connection user agrees to comply with the confidentiality provisions of the access agreement between TWC and the user.

OK Cancel

To login to TWIST, double click on the **TWIST icon** on the desktop. The logon window displays.

Alternatively, you can go to Start (on the bottom left of the desktop). Select **Programs - Twist 32 - TWIST Phase IV**.

In the User ID field, type in your **assigned user ID**. Your user ID is provided by H-GAC.

When logging into TWIST for the first time, type in the default password, **“onestop.”** Use this default password if your password is ever reset. The password is good for 60 days. Your new password must be at least six characters and contain at least one letter and one number. Passwords are case sensitive.

Make sure the Region field is set at **“Production.”**

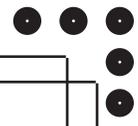
When you click the OK button, you are agreeing to treat the information in TWIST as confidential.

Navigating in TWIST



You use icons to navigate in TWIST and access all the menus and tabs.

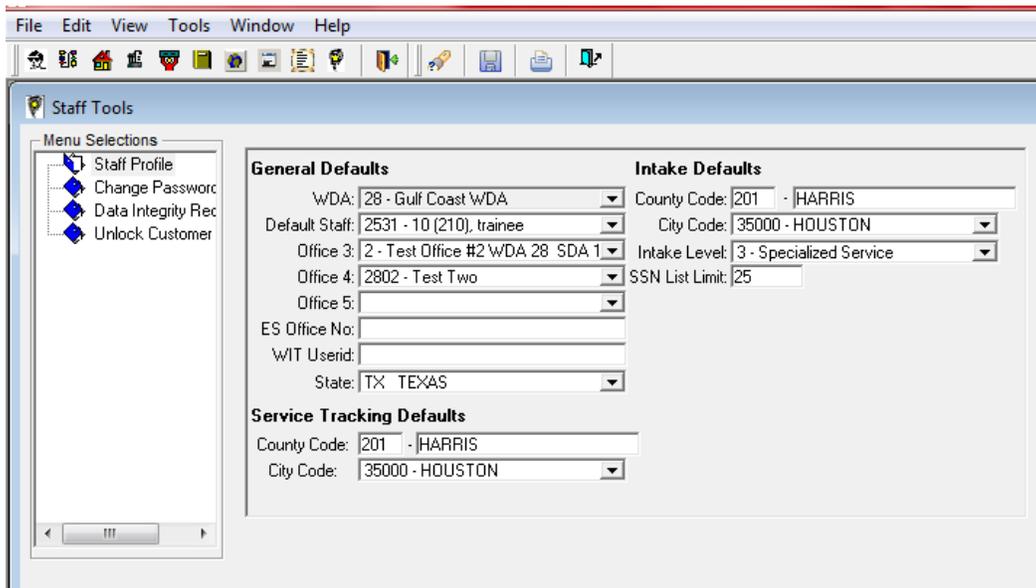
- Exit
- TWIST Web (search)
- Workforce Center Customer Tracking
- TWIST Web Reports
- WorkInTexas.com
- TDCJ Query (no longer available)
- Staff Tools
- Reference Tables
- WDA Administration
- Group Actions
- Customer Information



Icon Toolbar

The icon launches screens with menus and tabs used to navigate. When you choose one of the icons, you will find a list of menu items at the left side of the screen. Tabs are folders within each menu item.

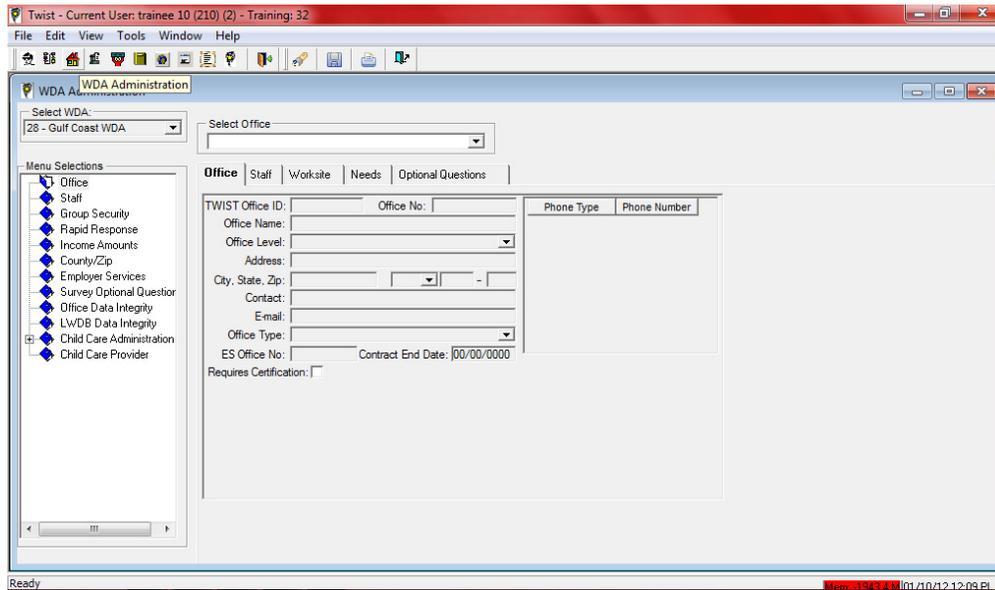
Icon – Staff Tools



The Staff Tools icon provides four menu items. The menu selections are on the left side of the screen. Set your staff profile before entering data into TWIST.

- Establishing a Staff Profile sets the defaults displayed in TWIST, including city, county, state, office type, and staff member information. It also allows you to set defaults for commonly used data. For example, if the majority of your customers reside in the same city and county, this data can be populated automatically into TWIST.
- Data Integrity: The TWIST data integrity process monitors performance-related data updates and/or changes. A notification occurs when data is not entered timely. The notification initiates a process to request approval of the newly entered data. Check here for the status of the approval.
- Change Password is used to change your password. TWIST requires you to change your password every 60 days. Use this feature to change your password if you feel it has been compromised.
- Unlock Customer is used to release the records that are locked. Only one person has the capability to change a record at one time. The system will automatically lock a customer's record when more than one user attempts to make changes.

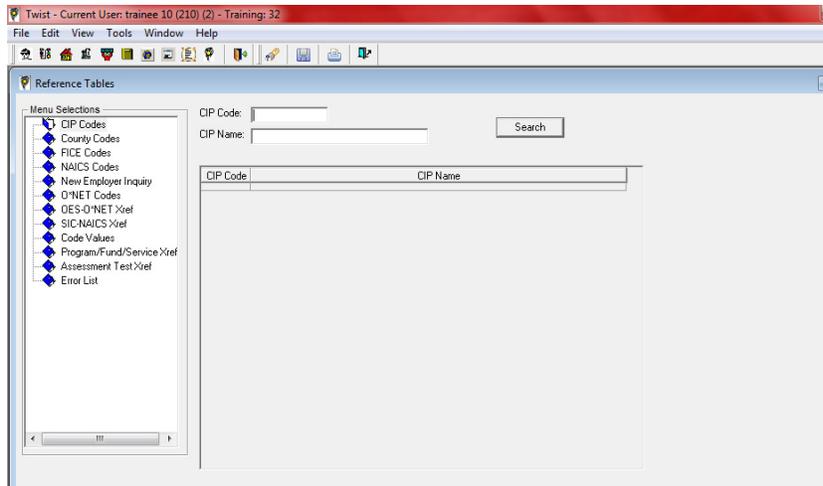
Icon – WDA Administration



The menu items that you might use under this icon include:

1. Rapid Response (Out-Placement) – includes a list of all of the employers identified as possibly meeting the requirements for Outplacement/Rapid Response in the Gulf Coast region.
2. Income Amounts – provides income guidelines that are used for determining Workforce Innovation and Opportunity Act (WIOA) Youth income eligibility ONLY.
3. County\Zip Codes – Zip codes are assigned to offices to eliminate confusion as to which office is to provide services to a customer receiving benefits with a work requirement. This screen shows the zip codes assigned to each office. Note: Although the zip codes are assigned to an office, the customer is not limited to the office her zip code is assigned. She may go to any office she desires.

Icon – Reference Tables



The Reference Tables provide information used for tracking services to customers. The items found here include:

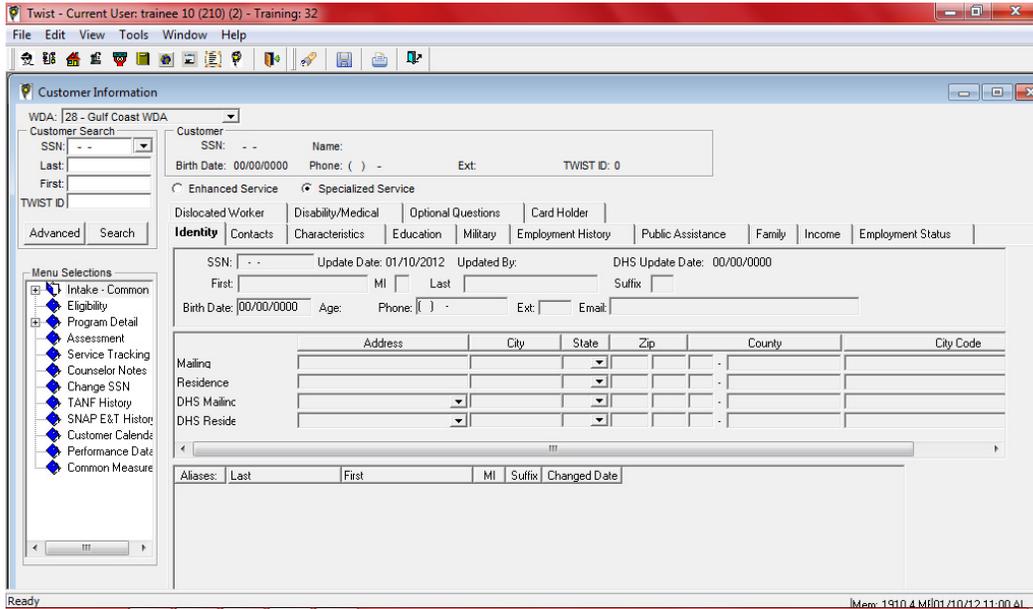
1. CIP Codes - Classification of Instructional Programs
2. County Codes - Three digit code used for county identification
3. FICE Codes - Federal Interagency Commission on Education. It is primarily used by the government to identify educational institutions.
4. NAICS Codes - North American Industry Classification System replaced the U.S. Standard Industrial Classification (SIC) system as the primary method to classify and group businesses by industry.
5. New Employer Inquiry - listing of employers receiving tax identifications the previous month
6. O*Net Codes - The Occupational Information Network replaced the Dictionary of Occupational Titles (DOT) codes as the primary source of occupational information.
7. OES - O*Net X-ref - Occupational Employment Statistics (OES)
8. SIC - NAIC X-ref - A cross reference of the NAICS that replaced the Standard Industrial Classification (SIC) system
9. Code Values - Descriptions of TWIST listed by types
10. Assessment Test X-ref
11. Educational Functional Level
12. Program/Fund/Service X-ref listing
13. Error List - Listing of error descriptions

Icon – Customer Information

The Customer Information icon displays the screen where you find and enter almost all information about customers. A menu of options is on the left side of the screen. Clicking on a menu item displays a screen with multiple tabs. Menu options include:

- Intake-Common
- Eligibility
- Program Detail
- Assessment
- Service Tracking
- Counselor Notes
- Change SSN
- TANF History
- SNAP History
- Customer Calendar
- Performance Data
- Common Measures

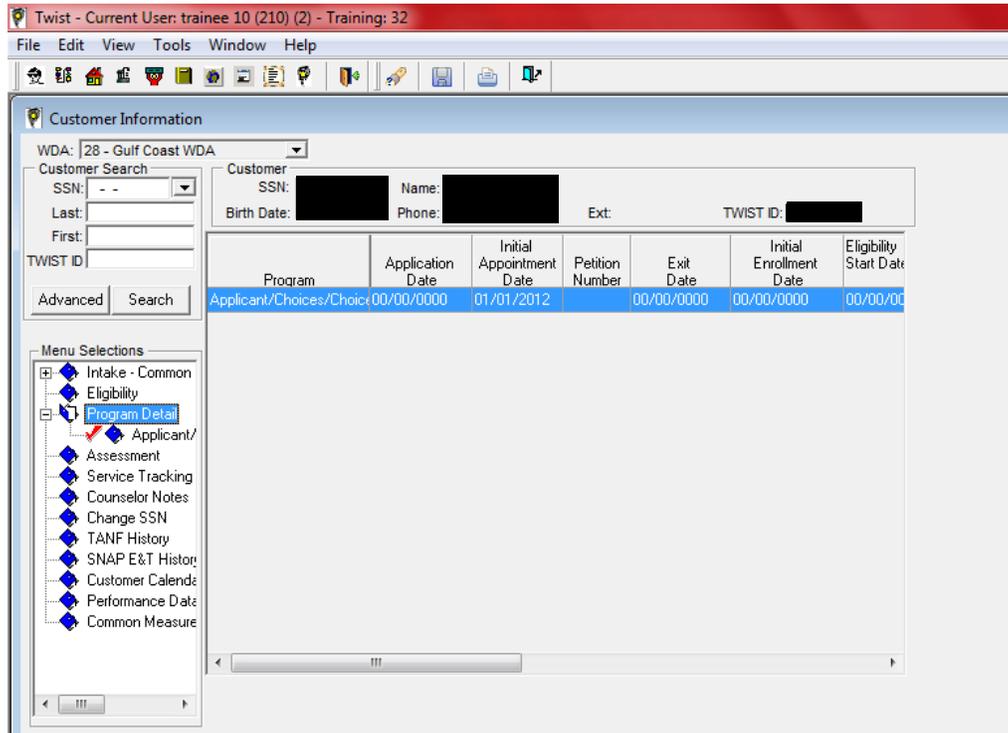
Menu Item – Intake Common



The initial screen shows the Intake-Common menu item where the customer’s identifying information is displayed. If Specialized Services is checked, thirteen tabs display on this screen containing demographic information about the customer.

To search for a particular customer, enter a SSN or Last and/or First Name and click on the **Search** button. If you get a match, the customer’s demographic information will populate fields in the Identity tab.

Menu Item – Program Detail



The Program Detail menu item identifies the different funding sources used to fund services for a particular customer. These funding sources include:

- ES - Employment Services (a record of a customer receiving basic services)
- WIOA – Workforce Innovation and Opportunity Act
- Applicant\Choices\Choices Plus – Individual receiving TANF (Temporary Aid to Needy Families)
- SNAP E&T- Supplemental Nutrition Assistance Program Employment and Training
- TAA – Trade Adjustment Act
- Rapid Response (out-placements from the labor force)
- Child Care – Child care referrals

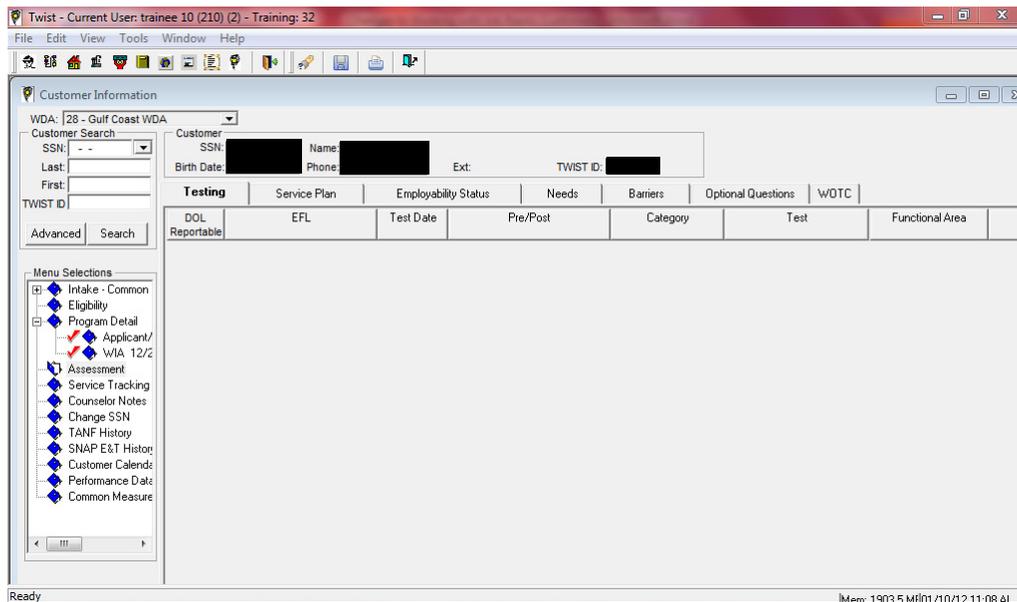
Each program detail contains information about the customer that relates to that funding source.

The screenshot displays the 'Customer Information' window in the Workforce Solutions Financial Aid application. The window title is 'Twist - Current User: trainee 10 (210) (2) - Training: 32'. The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar. The main content area is divided into several sections:

- Customer Search:** Fields for SSN, Last, First, and TWIST ID. A search button is present.
- Customer Information:** Fields for SSN, Name, Birth Date, Phone, Ext, and TWIST ID.
- Program Summary:** A tabbed interface with options for Program Summary, Eligibility Summary, Characteristics, Certification, Education, Military, Public Asst., Family, Income, and Income Redeter.
- Menu Selections:** A tree view on the left with items like Intake - Common, Eligibility, Program Detail (highlighted with a red checkmark), Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T Histor, Customer Calend, Performance Dat, and Common Measure.
- Program Details:** Fields for Eligibility Determine Date (12/20/2011), Application Date (12/20/2011), Eligibility Expiration Date (2/2/2012), Out of School (checkbox), Age (27), Assessed & Approved for Intensive Services (00/00/0000), Exit Date (00/00/0000), Assessed & Approved for Training Services (00/00/0000), Exit Reason, and Labor Force.
- Office and Program Information:** Fields for Office 3 (2 - Test Office #2 WDA 28), Office 4 (2802 - Test Two), Office 5, Program Type (WIA), Staff (2531 - 10 (210), trainee), and WDA (28 Gulf Coast WDA).

- A "+" sign in front of the menu item "Program Detail" indicates that program details for one or more funds have been established.
- Click on the "+" to identify which funds have been or are being used to pay for services to a customer.
- A red check mark in front of a specific program detail indicates the customer is currently receiving services in that funding stream.
- The absence of a red check mark indicates services are no longer being provided.

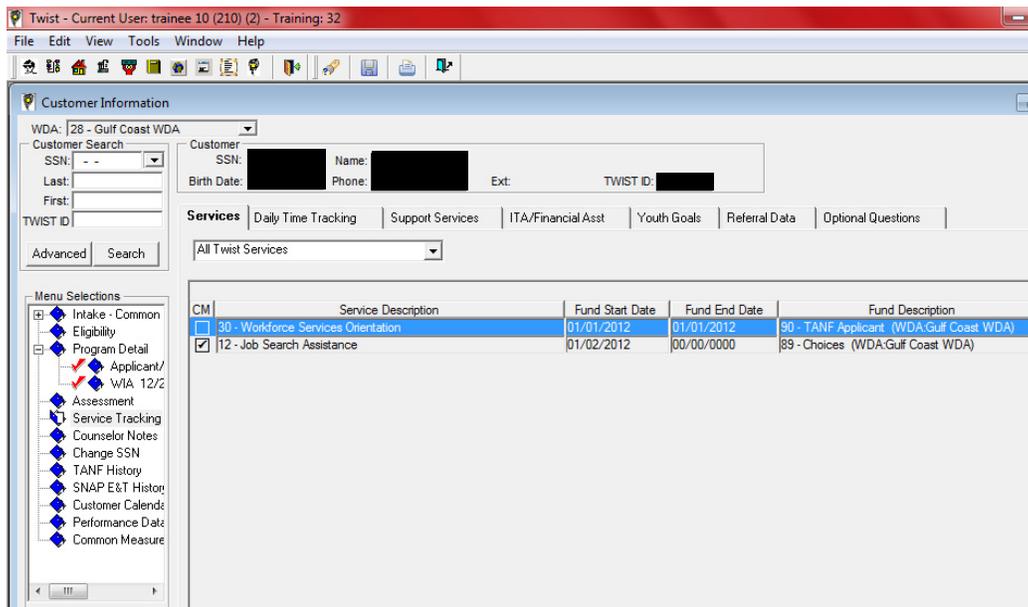
Menu Item – Assessment



The Assessment menu item contains testing and assessment information about the customer. There are seven tabs for entering information on:

1. Testing – Category, description, assessment type, date, test score, grade level, test type and description. Testing and Assessment Specialists use this panel.
2. Service Plan – The Service Plan is completed by PSRs for customers receiving financial aid over \$200 in a 12-month period and for customers tagged as WIOA Youth.
3. Employability Status – This tab populates information from TWIST or WorkInTexas.com to show the customer’s previous employers and related information. Most of this information may be automatically populated from information in WorkinTexas.com.
4. Needs
5. Barriers
6. Optional Questions
7. WOTC – Work Opportunity Tax Credit

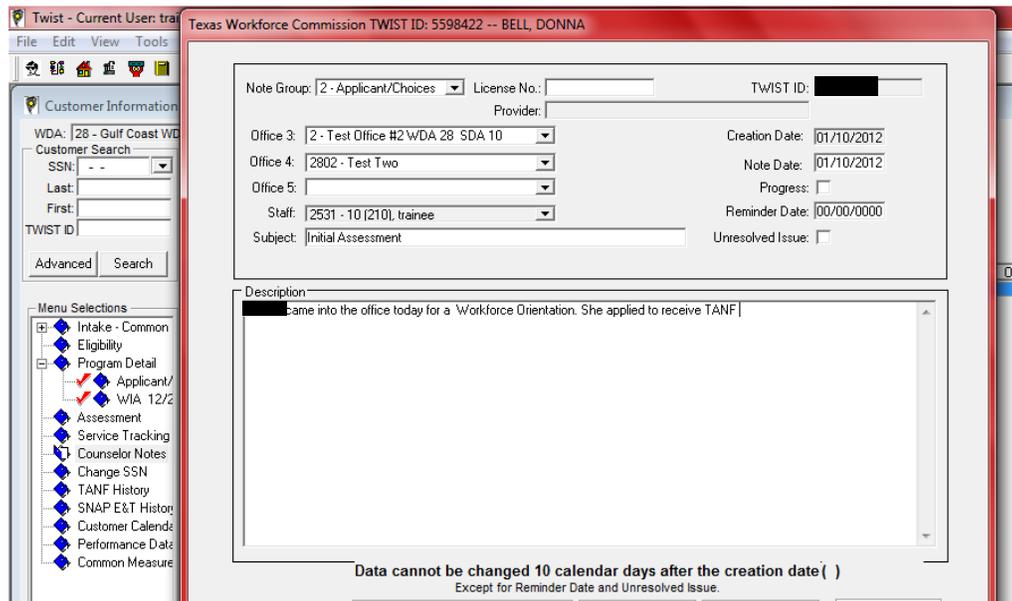
Menu Item – Service Tracking



The Service Tracking menu item contains information about all of the expanded and financial aid services that a customer receives: The tabs include:

1. Service - The Services Detail Panel provides additional information about a particular service. Access this panel by double clicking on any service on the Services tab. To open a new service, right click in the grey area under the Services tab and select Add.
2. Participation
3. Support Services
4. ITA/Financial Assistance
5. Youth Goals
6. Referral Data
7. Optional Questions

Menu Item – Counselor Notes

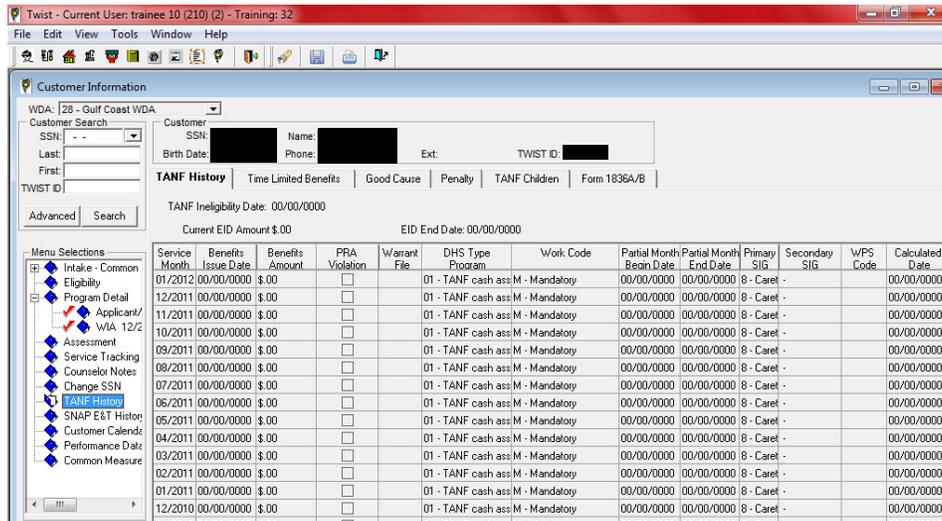


The Counselor Notes menu item provides a space for notes to supplement information about the customer that is already recorded in the Workforce Solutions MIS. Vital information that is not tracked or documented in the MIS can be recorded in this section, e.g., factors which may have an impact on employment efforts, support services terminated, credential achieved, etc.

Under the Freedom of Information Act, a customer can request information recorded in this section. Information in this area should include statements of fact, not opinions. Statements should be clear, concise, and grammatically correct. Avoid offering opinions, judgments, or values based on what you believe. A good rule of thumb is to stick to information that tells how, what, who, where, and when.

All staff can enter Counselor Notes when appropriate. Once a note is saved, it can't be deleted but it can be changed for up to ten (10) days.

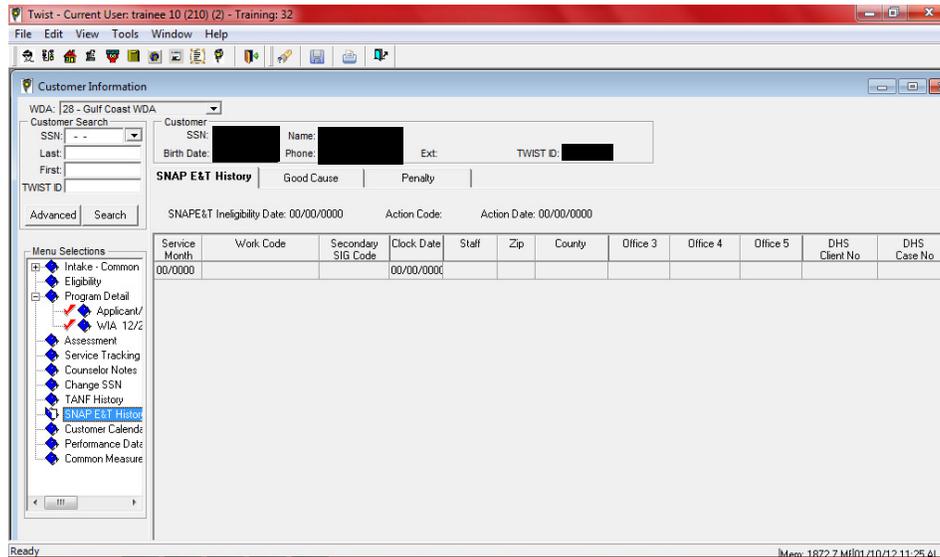
Menu Item – TANF History



The TANF History menu item displays information about the TANF benefits a customer received or is receiving. The tabs on this menu item include:

- Time Limited Benefits – displays the length of time a customer may receive benefits and the time remaining. The length of time is established by the State.
- Good Cause – a waiver, called Good Cause, may be granted to customers not meeting their work requirement for an acceptable reason. Good Cause can only be granted for certain reasons. The Good Cause tab provides an area to track this action. PSRs are responsible for granting Good Cause and entering the action into TWIST.
- Penalty – is used to view and record penalty requests to HHSC to stop benefits. A penalty is requested when a customer does not comply with work requirements and does not have Good Cause for not meeting the work requirements. Trackers are responsible for tracking cooperation hours and requesting penalties.
- TANF Children – displays information about the family member(s) of the TANF recipient on whose behalf benefits are being provided. This information is automatically updated in this component by HHSC.
- Form 1836A/B – indicates when a TANF/Choices customer has an approved “Reduced Work Requirement” (approved to meet requirements to work less than the normal 30 hours per week) due to a temporary disability or caring for someone with a disability.

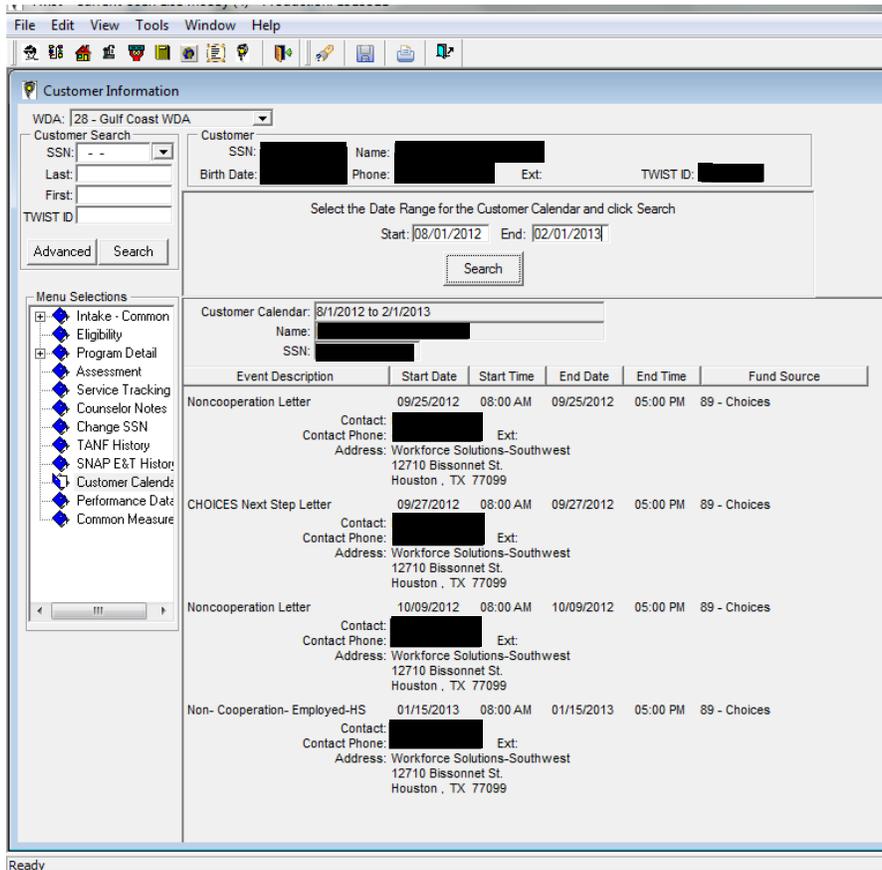
Menu Item – SNAP E&T



The SNAP E&T menu item provides information about customers who receive Supplemental Nutrition Assistance and qualify to receive services paid for with SNAP Employment & Training funds. This screen displays the customer's SNAP E&T benefits.

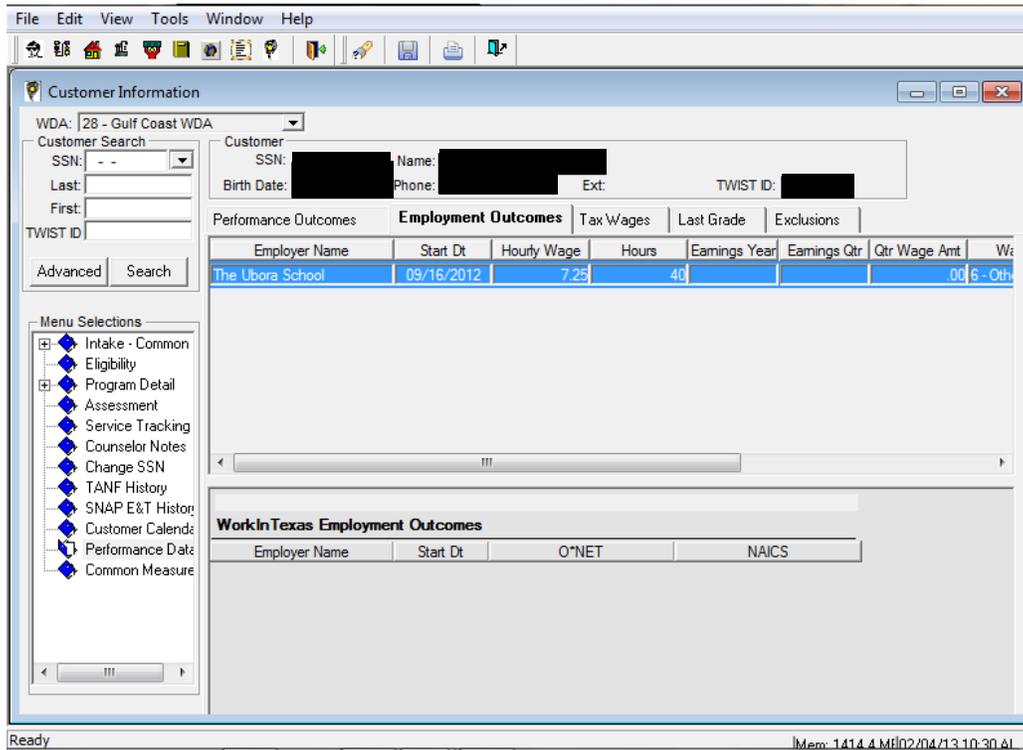
The Good Cause tab and Penalty tabs in SNAP E&T work the same way as Good Cause and Penalty in TANF.

Menu Item - Customer Calendar



The Customer Calendar menu option lists all events the customer has been scheduled for on the Scheduler. Events may include outreach and non-cooperation.

Menu Item – Performance Data



The Performance Outcomes tab displays the outcomes or results of any training or school completions, e.g., certificates of completion, diploma, degrees, etc., achieved by the customer.

The Wage Detail tab displays customer employment wage information reported to the State. Employment data from an employer who does not pay unemployment insurance taxes can be added.

Menu Item – Common Measures

The screenshot shows the TWIST software interface. The title bar reads "Twist - Current User: [REDACTED]". The menu bar includes "File", "Edit", "View", "Tools", "Window", and "Help". The main window is titled "Customer Information" and displays the following information:

- WDA:** 28 - Gulf Coast WDA
- Customer Search:** SSN: --, Last: [REDACTED], First: [REDACTED], TWIST ID: [REDACTED]
- Customer:** SSN: [REDACTED], Name: [REDACTED], Birth Date: [REDACTED], Phone: [REDACTED], Ext: [REDACTED], TWIST ID: [REDACTED]
- Participation:**

Start	Exit
07/26/2012	00/00/0000
- Effective Date:** 07/26/2012, **Revised By:** WorkInTexas, **Revised Dt:** 07/26/2012
- First Program:** ES
- Identity:** Residence Zip: 77477
- Employment Status:** Employ Status: 3 - Not Employed, UI Comp Status: [REDACTED]
- Characteristics:** Homeless: [REDACTED], Runaway Youth: [REDACTED], Pregnant Youth: [REDACTED], Limited English: [REDACTED], Offender: [REDACTED], MSFW: 4 - None, Foster Youth: [REDACTED]
- Self Service:** Military Service: 2 - No, Disabled Vet: [REDACTED], Operation Iraqi Freedom and/or Operation Enduring Freedom: [REDACTED], Disabled/Medical: Disabled: 2 - No
- Staff Assisted:** Education At Participation: Highest Grade: 18 - Bachelor's Deg, School Status: [REDACTED], Family: Family Status: [REDACTED], Dislocated Worker: WPRS: 2 - No, Displ Homemaker: [REDACTED], Dislocation Date: 00/00/0000
- Exclusion Reason:** [REDACTED], **Exclusion Start Date:** [REDACTED], **Exclusion End Date:** [REDACTED]

The status bar at the bottom shows "Ready" and "Mem: 1441.5.Mfl02/04/13 10:33:41".

The Common Measures menu item displays the Participation Summary screen. This screen lists all participation periods for the customer and provides access to all participation period characteristics.

The data displayed on this screen is a snapshot of the characteristics entered when the customer received her first qualifying services for the applicable participation period. This information must not be changed unless there is documentation showing that the original information was entered incorrectly. Corrections must be documented in TWIST counselor notes and will be closely monitored.

Verify Information

Before you create or update the customer record, collect and verify all funding stream eligibility criteria documentation.

Verify a customer has applied to receive TANF:

Customers identified as *TANF Applicants* have applied for but are not yet receiving TANF benefits. TANF applicants may be eligible for 30 days of financial aid for child care once they have attended a workforce orientation. If a customer requests child care at the time of the orientation the HHSC Referral form 2588 serves as documentation the customer is a TANF applicant. If the customer returns to the Workforce Solutions office for child care after receiving an orientation, confirm his/her status as a TANF applicant in TWIST.

8. Log onto TWIST and retrieve your customer record. The Customer Information screen displays.

The screenshot shows the TWIST Customer Information screen. The window title is "Twist - Current User: [redacted]". The menu bar includes File, Edit, View, Tools, Window, and Help. The main content area is titled "Customer Information" and includes a search section on the left with fields for WDA (28 - Gulf Coast WDA), Customer Search, SSN, Last, First, and TWIST ID. The main record displays the following information:

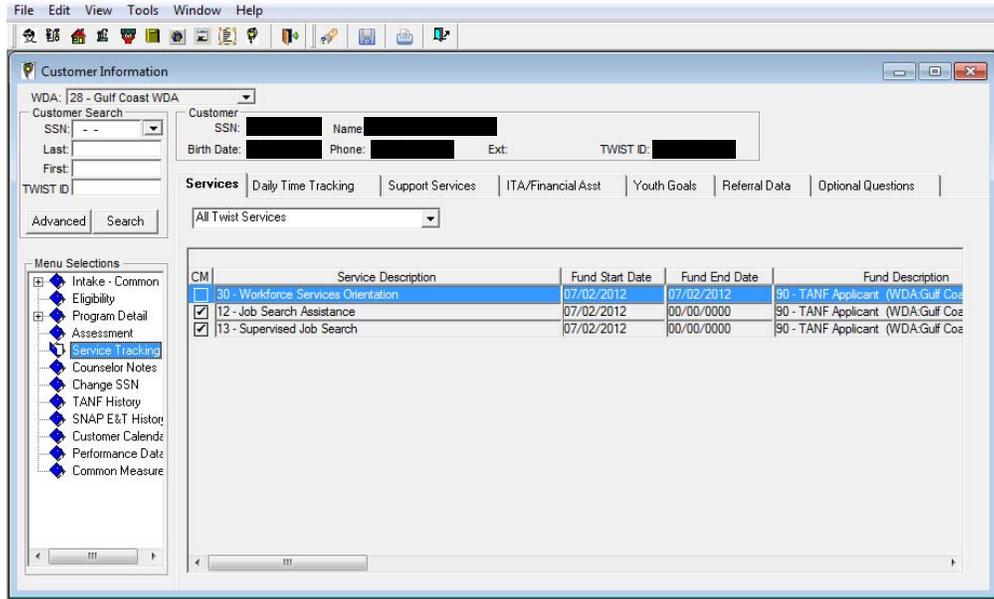
- Customer: [redacted]
- SSN: [redacted] Name: [redacted]
- Birth Date: [redacted] Phone: [redacted] Ext: [redacted] TWIST ID: [redacted]
- Enhanced Service (selected) / Specialized Service
- Optional Questions / Card Holder
- Identity Characteristics Education Military Family Employment Status Dislocated Worker Disability/Medical
- SSN: [redacted] Update Date: 07/03/2012 Updated By: [redacted] DHS Update Date: 01/07/2011
- First: [redacted] MI: [redacted] Last: [redacted] Suffix: [redacted]
- Birth Date: [redacted] Age: 21 Phone: [redacted] Ext: [redacted] Email: [redacted]
- Address table:

	Address	City	State	Zip	County	
Mailing	[redacted]	HOUSTON	TX	77090	201	HARRIS 350
Residence (Same)	[redacted]	HOUSTON	TX	77090	201	HARRIS 350
DHS Mailing	[redacted]	HOUSTON	TX	77090	5375	201 - HARRIS 350
DHS Residence	[redacted]					

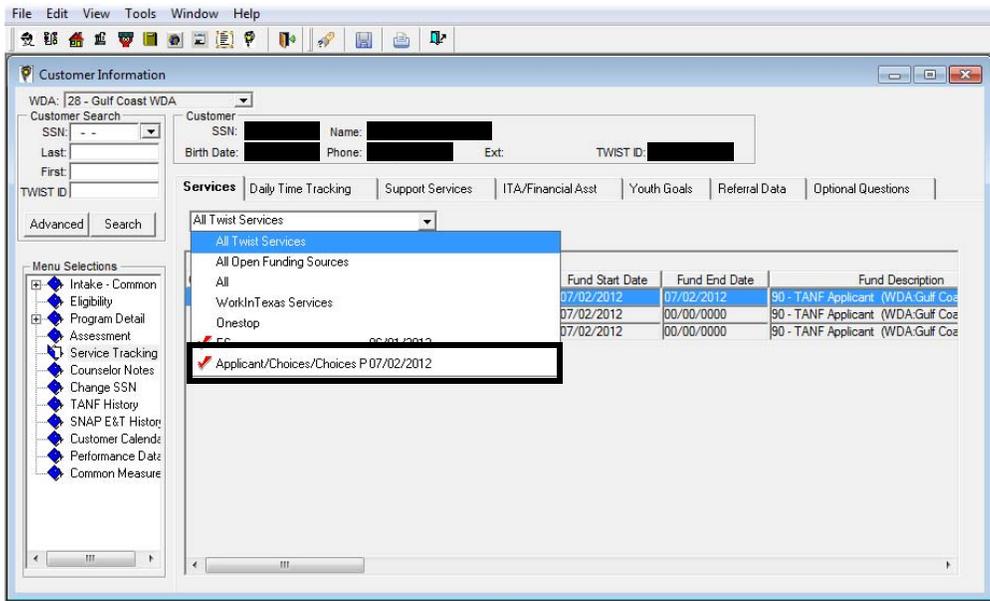
- Aliases table:

Aliases:	Last	First	MI	Suffix	Changed Date
	[redacted]	[redacted]			06/12/2012

9. Click on the Service Tracking menu selection. A list of services displays.



10. Select All Open Funding Source from the dropdown menu just below the Services tab.



11. Select the TANF applicant Program Detail displayed in the Fund Description box with a red check mark next to it. This indicates an active TANF applicant.
12. Confirm there is at least one service open with TANF Applicant funding, by verifying a service listed with no Fund End date.

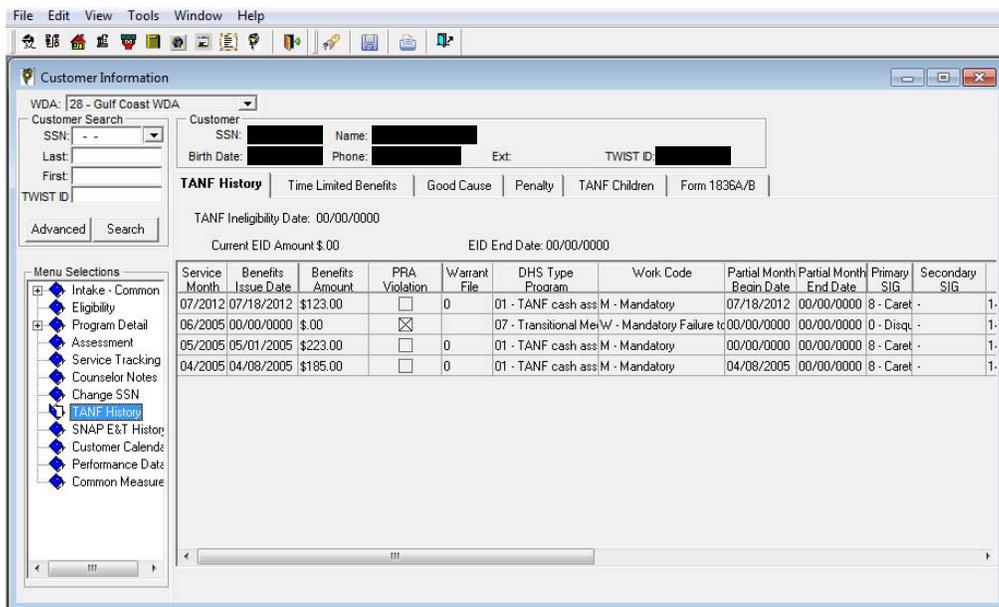
The screenshot shows the 'Customer Information' window for WDA: 28 - Gulf Coast WDA. The 'Customer Search' section includes fields for SSN, Last, First, and TWIST ID. The 'Customer' section includes fields for SSN, Name, Birth Date, Phone, Ext, and TWIST ID. The 'Optional Questions' section has tabs for Services, Daily Time Tracking, Support Services, ITA/Financial Asst, Youth Goals, and Referral Data. The 'Services' tab is active, showing a table of services. The table has columns for CM, Service Description, Fund Start Date, Fund End Date, and a checkbox. The 'Fund End Date' column for the selected row is highlighted with a red box. The 'Fund End Date' field is empty, indicating no end date.

CM	Service Description	Fund Start Date	Fund End Date	
<input type="checkbox"/>	30 - Workforce Services Orientation	07/02/2012	07/02/2012	30 - TANF Appl
<input checked="" type="checkbox"/>	12 - Job Search Assistance	07/02/2012	00/00/0000	30 - TANF Appl
<input checked="" type="checkbox"/>	13 - Supervised Job Search	07/02/2012	00/00/0000	30 - TANF Appl

Verify a customer is currently receiving TANF:

Customers currently receiving TANF benefits are immediately eligible for child care financial aid. To verify a customer is currently receiving TANF:

1. Retrieve the customer record.
2. From the Customer Information screen, click on the TANF History menu selection. The TANF History screen displays.



If the TANF Ineligibility Date contains only zeros and a line is listed for the current month, the customer is currently receiving TANF. If the TANF Ineligibility Date is in the future and there is a line listed for the current month, the customer is currently receiving TANF and will continue to receive TANF until that date.

3. Click on the Time Limited Benefits tab. The Time Limited Benefits screen displays.

The screenshot displays a software window titled "Customer Information" for "WDA: 28 - Gulf Coast WDA". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar. The main area is divided into several sections:

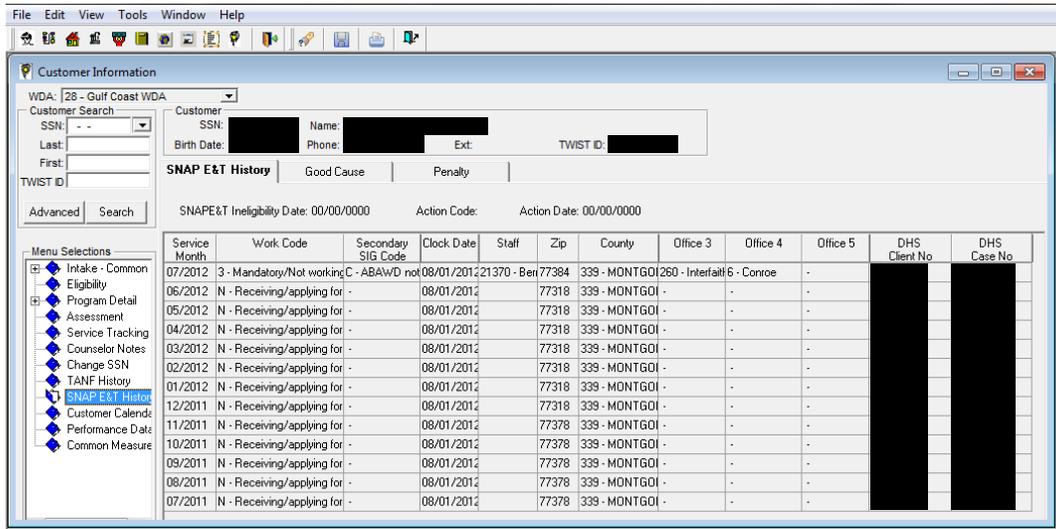
- Customer Search:** Fields for SSN, Last, First, and TWIST ID. An "Advanced Search" button is present.
- Customer Information:** Fields for SSN, Name, Birth Date, Phone, Ext, and TWIST ID.
- TANF History:** A tabbed interface with "Time Limited Benefits" selected. Other tabs include "Good Cause", "Penalty", "TANF Children", and "Form 1936A/B".
- State Time Limits:**
 - Tier: 5 - 12 months
 - Months Used: 1
 - Months Left: 11
- Federal Time Limits:**
 - Months Used: 14
 - Months Left: 46
- Menu Selections:** A tree view on the left containing options like Intake - Common, Eligibility, Program Detail, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T History, Customer Calendar, Performance Data, and Common Measure.

Use the number of months left under State Time Limits to establish an end date for child care financial aid. In this example, the customer has 11 months of TANF eligibility remaining; therefore, financial aid for child care can be provided for 11 months.

Verify a customer is currently receiving SNAP:

Customers receiving SNAP benefits and identified as General Population by HHSC may be immediately eligible for child care financial aid. To use TWIST to verify a customer is currently receiving SNAP:

1. Retrieve the customer’s record.
2. From the Customer Information screen, click on the SNAP History menu selection. The SNAP History screen displays.



If the SNAP E&T History date contains only zeros and a line is listed for the current month, the customer is currently receiving SNAP. If there is a date populated, the customer is not currently receiving SNAP.

IMPORTANT NOTE:

You can verify the date the customer was certified to receive SNAP in TIERS. Get with your supervisor for a list of staff in your office that has TIERS access.

Verify children are on the TANF HHSC record:

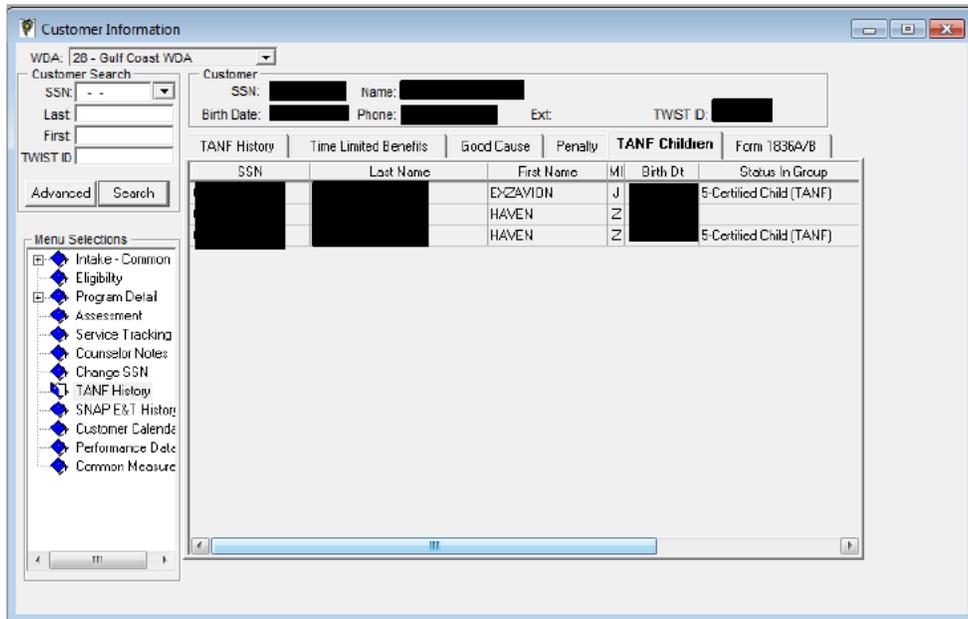
For customers requesting financial aid for child care, verify the children listed on the HHSC TANF record in TWIST.

1. From the customer record click on the TANF History tab. The TANF history screen displays.

The screenshot shows the 'Customer Information' window with the 'TANF History' tab selected. The window includes a search section on the left, a customer search area at the top, and a table of history records. The table has columns for Service Month, Benefits Issue Date, Benefits Amount, PRA Violation, Warrant File, DHS Type Program, Work Code, and Partial Month Begin Date.

Service Month	Benefits Issue Date	Benefits Amount	PRA Violation	Warrant File	DHS Type Program	Work Code	Partial Month Begin Date
07/2012	07/13/2012	\$165.00	<input type="checkbox"/>	0	01 - TANF cash ass	M - Mandatory	07/13/2012

2. Click on the TANF Children tab. A list of children included on the HHSC TANF case displays.



Review Provider Information

Before you create or update the customer record for customers requesting financial aid for child care, verify information about the provider chosen by the customer. TWIST provides general information about the provider including:

- Schedule
- Rates
- Special services
- Group size and meals
- Transportation availability
- Additional information

IMPORTANT NOTE:

The provider information in TWIST is not always up-to-date. Encourage the customer to talk to the provider directly if she has questions.

To access provider information in TWIST:

1. Click on the WDA Administration icon. The WDA screen displays.

2. Click on the Child Care Provider menu option. The Provider search screen displays.

3. Perform a provider search. You can search by provider name or license number. To search by name you must enter at least two characters of the provider name. The provider information screen displays.

The screenshot displays the 'Provider Information' screen in a software application. The interface includes a menu on the left with options like 'Office', 'Staff', and 'Child Care Provider'. The main area is divided into sections: 'Provider Information', 'Provider Address', and 'Provider Accreditation'. The 'Provider Information' section contains various fields for provider details, including operation type, name, phone numbers, license information, and dates. The 'Provider Address' section shows physical and mailing addresses with dropdowns for city, state, zip, and county. The 'Provider Accreditation' section is currently empty.

Provider Information					
Operation Type:	1 - Licensed Center	Licensed Center Type:	1 - Child Care Program		
Provider Name:	[REDACTED]	Managing Board:	28 - Gulf Coast WDA		
Phone Number:	[REDACTED]	Repayment Schedule:	N/A		
Cell Phone:	[REDACTED]	License Number:	[REDACTED]		
Fax:	[REDACTED]	SSN:	[REDACTED]	FEIN:	[REDACTED]
Authorized Rep.:	[REDACTED]	Owner Code:	3 - Private, for Profit		
Authorized Rep. Phone:	[REDACTED]	Charity Type:	3 - Not Applicable		
Email Address:	[REDACTED]	License Status:	3 - Full Permit		
Website Address:	[REDACTED]	License Issue Date:	05/22/2000		
Verified not on National Sex Offender DB:	2 - No	Monitoring Frequency:	6-9 months		
Date Verified:	00/00/0000	Corrective/Adverse:	[REDACTED]		
Ineligible Provider Date:	00/00/0000				

Provider Address					
Address	City	State	Zip	County	
Physical Address: [REDACTED]	Spring	TX	77380	339 MONTGOMERY	
Line 2:					
Mailing Address: [REDACTED]	SPRING	TX	77380	339 MONTGOMERY	
Line 2:					

Provider Accreditation					
[REDACTED]					

Use the tabs at the top to explore provider information.

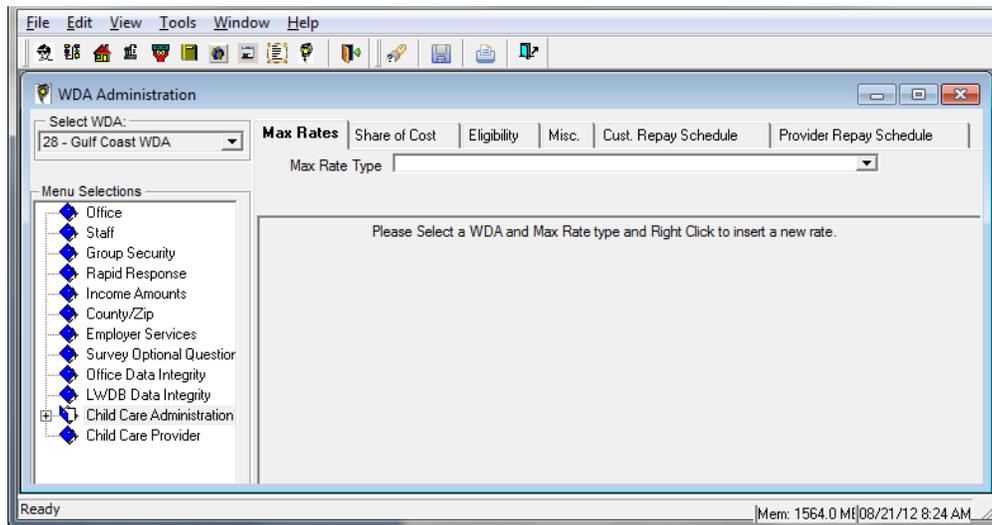
Parent Share of Cost

Working customers who receive WS financial aid for child care are required to pay a share of the cost of care. This share of cost is based on the customer's income and a sliding scale. Before awarding financial aid discuss the share of cost requirement with the customer and give her an idea of what her portion will be. Be sure to include discounts in your estimates.

Module 2: Creating and Updating the Customer Record

To access the sliding scale chart for the parent share of cost:

From the WDA Administration screen click on Child Care Administration menu selection. The WDA Administration screen displays.



Click on the Share of Cost tab. The Share of Cost screen displays showing the sliding scale chart.

HH Size	0% - 50%		51% - 75%		76% - 100%		101% - 125%		126% - 150%				
	First Child \$	Addl Child \$											
2	0	4.00	614	915	820	1226	1227	1832	1411	1833	1838		
3	0	7.72	773	1158	1159	1544	1410	1545	1930	1512	1931	2316	
4	0	931	932	1397	1118	1863	1411	1864	2328	1512	2329	2784	
5	0	1090	1091	1636	1118	1637	2181	1511	2182	2726	1512	2727	3271
6	0	1250	1251	1874	1218	1875	2499	1511	2500	3124	1612	3125	3749
7	0	1409	1410	2113	1218	2114	2818	1511	2819	3522	1613	3523	4226
8	0	1568	1569	2352	1218	2353	3126	1511	3127	3920	1613	3921	4704
9	0	1727	1728	2591	1218	2592	3454	1512	3455	4318	1613	4319	5181
10	0	1886	1887	2829	1218	2830	3773	1612	3774	4716	1613	4717	5659
11	0	2045	2046	3068	1218	3069	4091	1612	4092	5114	1613	5115	6136
12	0	2205	2206	3307	1218	3308	4409	1612	4410	5511	1613	5512	6614
13	0	2364	2365	3546	1218	3547	4728	1612	4729	5909	1613	5910	7091
14	0	2523	2524	3784	1218	3785	5046	1612	5047	6307	1613	6308	7500
15	0	2682	2683	4023	1218	4024	5384	1612	5385	6706	1613	6707	7900

Locate the Parent Share of Cost amounts for a customer by finding the customer's household size and income range in the chart. At the top of the column is the share of cost amounts for the first child and additional child(ren). These are the amounts TWIST uses in the System Calculations.

2-31

Creating the Customer Record

Intake Common

To establish financial aid and create/update an electronic customer record in TWIST, begin by entering or updating the customer's basic information on the Intake-Common menu selection. Include information on:

- Household dependents
- Family income
- Hours in work or school
- Children needing care
- Demographics

The information you enter on the Intake-Common determines how TWIST processes the data pertaining to parents, children, family members, and general eligibility requirements. Once the information is entered, TWIST displays the funding streams for which the customer qualifies. Then you create a Program Detail for the customer based on her needs. For example: a customer may qualify for a scholarship and for financial aid for child care. You would create both a WIOA and a Child Care Program Detail.

IMPORTANT NOTE:

The information entered on the Intake-Common establishes eligibility for child care financial aid. Changing the information here may change the customer's eligibility.

Module 2: Creating and Updating the Customer Record

Once you are logged into TWIST, access the Customer Information screen by clicking on the Customer Information Icon. The Customer Information: Intake-Common screen displays. Make sure the Specialized Service radio button above the tabs is checked. The TWIST Specialized Service level includes additional information and characteristics that must be collected for determining eligibility for a specific fund code such as WIOA.

Customer Information

WDA: 28 - Gulf Coast WDA

Customer Search: SSN: - - Last: First: TWIST ID: Advanced Search

Customer: SSN: - - Name: Birth Date: 00/00/0000 Phone: () - Ext: TWIST ID: 0

Enhanced Service Specialized Service

Dislocated Worker | Disability/Medical | Optional Questions | Card Holder

Identity | Contacts | Characteristics | Education | Military | Employment History | Public Assistance | Family | Income | Employment Status

SSN: - - Update Date: 07/24/2012 Updated By: DHS Update Date: 00/00/0000

First: MI Last Suffix

Birth Date: 00/00/0000 Age: Phone: () - Ext: Email:

Address	City	State	Zip	County	City Code
Mailing					
Residence					
DHS Mailing					
DHS Residence					

Aliases: Last First MI Suffix Changed Date

Click on the **Customer Information** icon on the top menu bar.

Twist - Current User: trainee 10 (210) (2) - Training: 32

Customer Information

WDA: 28 - Gulf Coast WDA

Customer Search: SSN: - - Last: First: TWIST ID: Advanced Search

Customer: SSN: [REDACTED] Name: [REDACTED] Birth Date: [REDACTED] Phone: [REDACTED] Ext: TWIST ID: [REDACTED]

Enhanced Service Specialized Service

Dislocated Worker | Disability/Medical | Optional Questions | Card Holder

Identity | Contacts | Characteristics | Education | Military | Employment History | Public Assistance | Family | Income | Employment Status

SSN: [REDACTED] Update Date: 00/00/0000 Updated By: DHS Update Date: 09/23/2004

First: [REDACTED] MI [REDACTED] Last [REDACTED] Suffix

Birth Date: [REDACTED] Age: 27 Phone: () - Ext: Email:

Address	City	State	Zip	County	City Code
Mailing	[REDACTED]	AUSTIN	TX	24028	201 - HARRIS
Residence	[REDACTED]				
DHS Mailing	[REDACTED]	AUSTIN	TX	24028	201 - HARRIS
DHS Reside	[REDACTED]				

Aliases: Last First MI Suffix Changed Date

Perform a Customer Search

To avoid dual data entry, the first step in creating a customer record is to perform a customer search in TWIST. This prevents unnecessary duplication of effort by using customer information that already resides in one or more of the MIS components. For example, many customers already have an application in WorkInTexas.com. If the Social Security Number (SSN) matches, the data from that application automatically populates designated fields used to create the customer record in TWIST.

You can search for customers using:

- SSN
- Name or partial name
- TWIST ID
- WIT ID
- Health and Human Services (HHSC) Case – or Client number
- Household member's SSN
- Household member's name or partial name

To perform a search in TWIST:

1. Select the **Customer Information** icon. The **Intake Common** screen displays.

WDA: [28 - Gulf Coast WDA]

Customer Information

Customer Search

SSN: [] Name: []

Birth Date: [] Phone: [] Ext: [] TWIST ID: []

Enhanced Service Specialized Service

Dislocated Worker Disability/Medical Optional Questions Card Holder

Identity Contacts Characteristics Education Military Employment History Public Assistance Family Income Employment Status

SSN: [] Update Date: 00/00/0000 Updated By: [] DHS Update Date: 09/23/2004

First: [] MI: [] Last: [] Suffix: []

Birth Date: [] Age: 27 Phone: [] Ext: [] Email: []

Address	City	State	Zip	County	City Code
[]	AUSTIN	TX	78701	HARRIS	[]

Aliases: Last | First | MI | Suffix | Changed Date

2. Choose the method you will use to search for the customer.
 - To search by SSN:
 - Type the customer's SSN, without dashes, in the SSN field, and either press Enter or click the Search button.
 - To search by customer name:
 - Type the customer's last and first name in the Customer Search section, and either press Enter or click the Search button.

Note: You may type a partial name, and the system displays names with that string of letters. The more letters you enter, the narrower your search.

If no records exist in TWIST, the No Results popup screen displays with three options.



You can choose to:

- Search other Databases (such as TANF, SNAP, or UI), or
- Add as New Customer, or
- Cancel to use the Advance Search.

Note: Before you do any of the above, you might be able to find the customer record in WorkInTexas.com. This will keep you from having to perform duplicate data entry. Log into your WorkInTexas staff account and search for the customer by name or WIT ID. If you find it, write down the WIT ID number – you'll need it for the Advance Search in TWIST.

Advanced Search

- To search by TWIST or WIT ID, HHSC EDG or Client number, click on the **Cancel** button. The Customer Information screen redisplay.
- Click on the **Advanced** button to the left of Search. The **Advanced Search** screen displays.

Customer Search

TWIST ID
 Customer SSN First Name: William Last Name: [REDACTED]
 Household Member SSN First Name: Last Name:
 WIT ID HHSC EDG (Case#): HHSC Client #:

Recently Viewed

Customer Search Result

Customer	Id	First Name	Middle	Last Name	DOB	Address (Residence)
	[REDACTED]	WILLIAM	D	[REDACTED]	[REDACTED]	[REDACTED]
	[REDACTED]	WILLIAM	G	[REDACTED]	[REDACTED]	[REDACTED]
	[REDACTED]	WILLIAM		[REDACTED]	[REDACTED]	[REDACTED]
	[REDACTED]	WILLIAM		[REDACTED]	[REDACTED]	[REDACTED]
	[REDACTED]	William	G	[REDACTED]	[REDACTED]	[REDACTED]

Total Rows 5

- Input as much information as desired. If you enter a SSN, a TWIST ID, a Household member’s SSN, and a WIT ID, the system will return up to 50 records that match any of those criteria.
- Select a customer by clicking on the **magnifying glass** in the **Customer** column. The Customer Detail window displays, and the customer name is placed in the Recently Viewed list allowing you to access the record from the SSN list dropdown on the Customer Information search area.

Customer

SSN: TWIST ID: NEW

Name: First Middle Last Suffix

Date of Birth:

Phone: Extension:

Email:

[| Privacy & Security | Disclaimer | Accessibility | Equal Op](#)

- Return to the **TWIST Customer Information** screen and retrieve your customer from the SSN dropdown list.

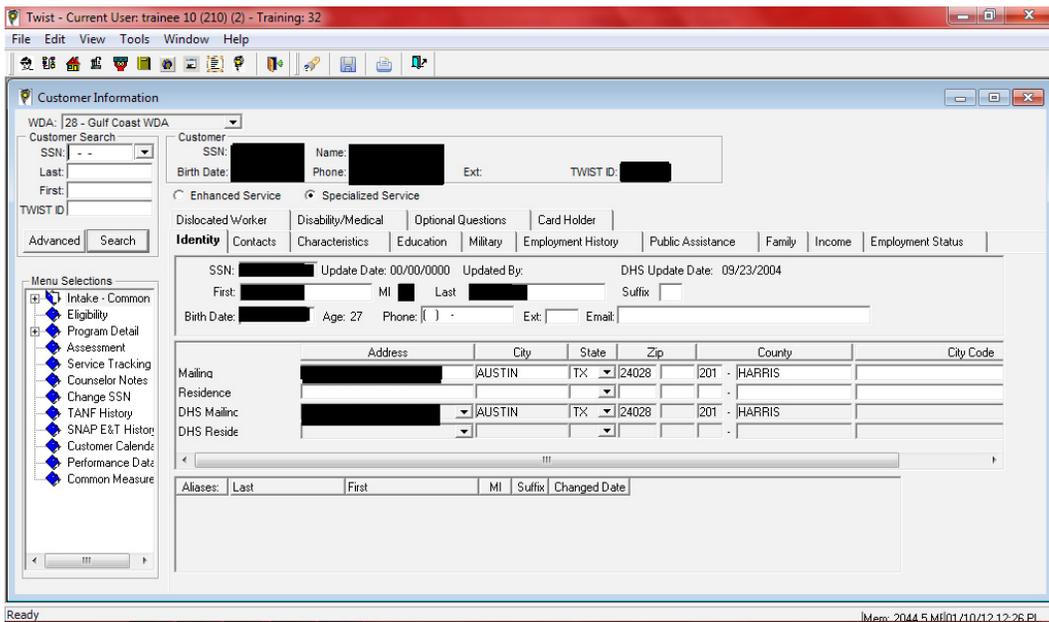
IMPORTANT NOTE:

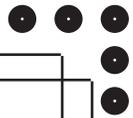
Remember to search for the customer in a variety of ways to avoid duplicating a record.

The Intake-Common window displays with the Identity tab in front. The Identity tab captures demographic information about the customer. It also provides the customer’s contact information.

Verify or update the information as necessary. The customer’s name, birth date, phone number, mailing and residence addresses are required fields.

If the customer’s residence address is the same as her mailing address type the word “same” in the residence address field and hit the Enter or Tab key on your keyboard. The mailing address will be copied into the residence address fields. Any names the customer has previously used are listed as aliases at the bottom of the screen.





STOP AND PRACTICE

Directions: Conduct a Customer Search and complete the information on the Identity tab for Sophie Johnson using her Financial Aid Application.

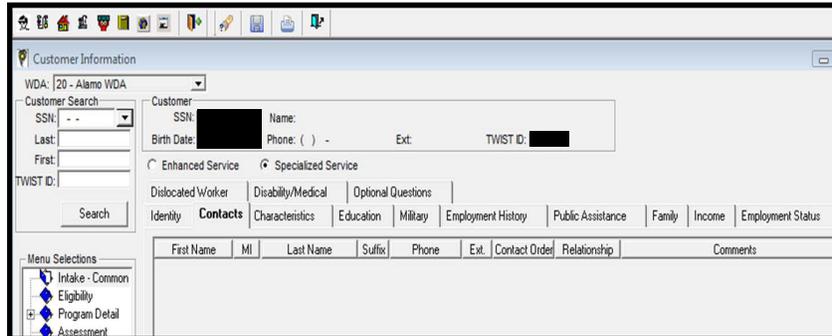
Use SSN ___ - 78 - 9928 (last 3 digits of User ID) to search for Sophie's record in TWIST. Search all other databases. If no record is found, add Sophie to TWIST as a new customer.

Tip: If the customer's residence address is the same as the mailing address, type the word "Same," in the residence address field and press the Enter or Tab key, or by clicking the "same" check box.

IMPORTANT NOTE:

Always **SAVE** the information before you move to the next tab.

Click on the **Contacts** tab. The Contacts screen displays



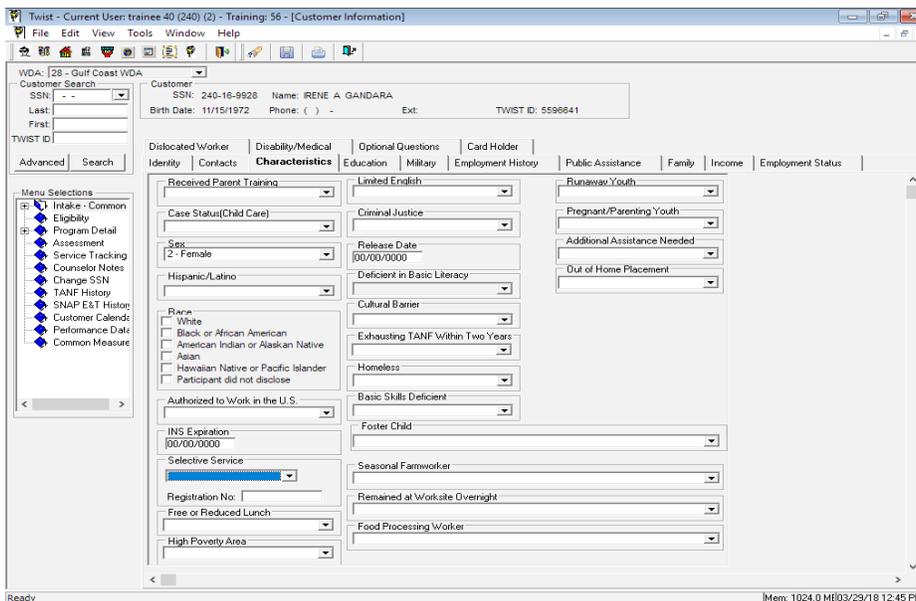
Use the **Contacts** tab to record additional people to contact when you cannot reach the customer by phone, mail, or email. Regardless of the number of contacts you list here, you must include the Contact Order. Use the comment field to include other information about the contact, such as where she works and her work phone number.

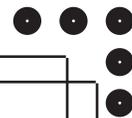
Note: This tab is optional.

Verify or update the information as needed.

Characteristics Tab

Next, click on the Characteristics tab. The Characteristics screen displays.





The Characteristics tab allows you to create a basic profile and enter eligibility characteristics of customers. Scroll down to see additional fields. Enter all of the information you have about the customer. If a field is not applicable, leave it blank. Choose 'No' only if you know the answer is 'No.' Required fields are based on the funding stream and the eligibility criteria the customer meets. For example 'Homeless' is one way a customer meets the Economic Eligibility criteria for WIOA. At a minimum complete the fields:

- Gender
- Citizenship
- Race
- Selective Service – males only. *See Selective Service Registration on the next page for more information.*
- Case Status is required only for customers requesting child care financial aid. This indicates the relationship between the parent and any children needing care.
 - Select **Parent/Legal Guardian** if the customer has children of her own in care, or if she has a combination of her own children and foster children.
 - Select **In Loco Parentis** if none of the children belong to the customer.

Save.

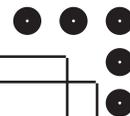
Enter Selective Service eligibility information for customers requesting substantial financial aid for education/training or support services.

Eligible Males	Selective Service Field	Selective Service registration No.
Between 14 and 17 years of age	4 - No - Under 18	Not required
Between 18 and 26 years of age ¹	1 - Yes	Required
Over 26 years of age with a valid Selective Service registration	1 - Yes	Required
Over 26 years of age, but born before 1960	5 - No - Born Before 1960	Not required
Over 26 years of age, born after 1960, and without a valid Selective Service registration ²	6 - No - Document in File	Not required

¹ Male customer receiving WIOA services has up to 30 days after his 18th birthday to register for Selective Service. After this time, a Selective Service registration number is required to remain eligible for service tracked with WIOA fund code.

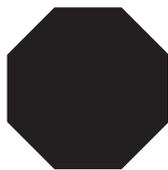
² Enter a justification in TWIST Counselor Notes explaining why the customer is not in compliance with Selective Service registration requirements. This is required before the customer may receive services.

- Only numbers can be saved in the Registration No: field.
- Selective Service entry is not allowed if the customer is female.
- WIOA funded services cannot be added under Service Tracking unless the status of the Selective Service registration has been properly recorded.
- The Eligibility Determination Date will not be saved in WIOA Program Detail unless the status of the Selective Service registration has been properly recorded.



IMPORTANT NOTE

When a male customer who is nearing his 18th birthday has registered for Selective Service, update his Selective Service eligibility information on the Intake - Common screen – not on the WIA Program Detail screen.



STOP AND PRACTICE

Directions: Complete the Characteristics tab for Sophie using the information on the Workforce Solutions Financial Aid Application.

Education Tab

Next, click on the Education tab. The Education Detail screen displays.

WDA: 28 - Gulf Coast WDA

Customer Search: SSN: - - Last: First: TWIST ID: Advanced Search

Customer: SSN: 240-16-9928 Name: IRENE A. GANDARA Birth Date: 11/15/1972 Phone: () - Ext: TWIST ID: 5596641

Dislocated Worker | Disability/Medical | Optional Questions | Card Holder | Identity | Contacts | Characteristics | **Education** | Military | Employment History | Public Assistance | Family | Income | Employment Status

Highest School Grade Completed: 12 - Twelfth grade completed Job Corps: HS Diploma/Equivalency: 1 - High school diploma Class Schedule: Highest Education Level Completed: Major: School Status: 5 - Not attending school, HS graduate or equivalent Adult Education Received: Voc. Ed. Perkins Received: Voc. Rehab. Received: Trng. Pay-for-Perf. Received:

School Name	Address	City	State	County	Zip	Total Hrs in School/Train
Lone Star Community College	1 University Dr	The Woodlands, TX	TX	339 MC	77081	21

List Special Courses Taken (Military, Vocational, Technical)
Courses

Ready | Mem: 1024.0 Mb | 03/29/18 12:51 PM

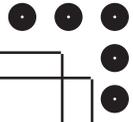
The Education tab collects school status and special course information. The Highest Grade Completed is required for all customers for whom WIOA funds are being used.

When opening a TWIST file for a customer tagged as **WIOA-Youth**, you must identify the customer as **in-school or out-of-school**.

Complete the fields:

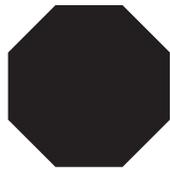
- HS Diploma/Equivalency
- Highest Education Level Completed
- School Status

to identify additional WIOA Youth qualifying criteria.



When opening a TWIST file for a **customer requesting financial aid for child care to support education**, you must also complete the School Name, Address, City, State, County Code, ZIP code, and Total Hours in School/Training fields. If the customer is attending more than one school, enter the Total Hours in School/Training for both schools. Enter information about the second school in Counselor Notes.

Save.



STOP AND PRACTICE

Directions: Complete the Education tab using Sophie's Workforce Solutions Financial Aid Application.

Military History Tab

Click on the Military tab.

WDA: 28 - Gulf Coast WDA

Customer Search: SSN: --, Last: , First: , TWIST ID:

Customer: SSN: [REDACTED], Name: [REDACTED], Birth Date: [REDACTED], Phone: [REDACTED], Ext: [REDACTED], TWIST ID: [REDACTED]

Enhanced Service | Specialized Service

Dislocated Worker | Disability/Medical | Optional Questions | Card Holder

Identity | Contacts | Characteristics | Education | **Military** | Employment History | Public Assistance | Family | Income | Employment Status

Military Service: 1 - Yes

Vietnam Service: [REDACTED] | Disabled Veteran: [REDACTED]

Homeless Veteran: | Recently Separated: | Campaign Veteran: | Transitioning:

Operation Iraqi Freedom and/or Operation Enduring Freedom: [REDACTED]

Military History						
Branch	Start Date	Release Date	Discharge Type	Release/Retire	Campaign Badge	Reserves
1 - Army	01/01/1976	12/24/2009	4 - Honorable	2 - Retire	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Menu Selections: Intake - Common, Eligibility, Program Detail, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T History, Customer Calendars, Performance Data, Common Measure

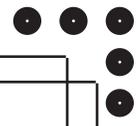
Ready | Microsoft Windows | 1/10/12 1:18 PM

Review the information. Complete and/or update the information if applicable. If you select Yes under Military Service, additional fields display.

Complete the applicable fields including:

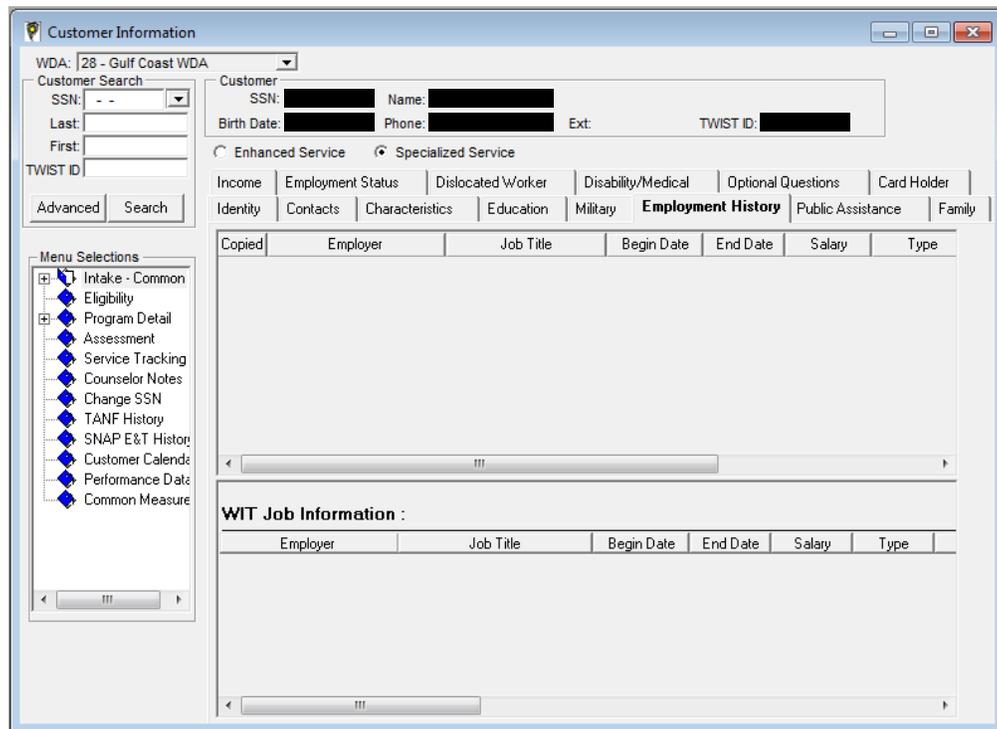
- Vietnam Service
- Disabled Veteran
- Homeless Veteran
- Recently Separated
- Campaign Veteran
- Transitioning

If necessary, right click to add additional details under **Military History**.



Employment History Tab

Click on the Employment History tab. The Employment History screen displays.



The Employment History tab is used to record current employment information for customers requesting financial aid for child care to support work. Right-click in the top gray area and select Add to enter the customer's employment details.

Customer Information

WDA: 28 - Gulf Coast WDA

Customer Search

SSN: - -

Last:

First:

TWIST ID

Advanced Search

Menu Selections

- Intake - Comm
- Eligibility
- Program Detail
- Assessment
- Service Track
- Counselor Not
- Change SSN
- TANF History
- SNAP E&T His
- Customer Cale
- Performance D
- Common Measur

Employment History Detail

Begin Date: 07/01/2011 End Date: 00/00/0000 Number of Months:

Employer: Pets R Us Contact:

Address: 123 Tomball Parkway

City: Houston TX 77070

Phone: (711) 309-9879 Ext:

Job Title: Cashier

Duties:

Weekly Work Hours: 20

Salary: \$10.00 Type: 1 - Hour Emp Status: 2 - Part Time

Separation: Still Employed

First Back Next Last New Delete OK Cancel

1 Of 1

WIT Job Information :

Employer	Job Title	Begin Date	End Date	Salary	Type

Enter all the information you gather about the customer's employment. Required fields are:

- Begin Date
- Employer Name
- Phone Number or Contact Information
- Weekly Work Hours
- Salary
- Separation

Save.



STOP AND PRACTICE

Directions: Complete the Employment History tab using Sophie's Financial Aid Application,

Public Assistance Tab

Click on the Public Assistance tab. The Public Assistance detail screen displays.

The screenshot shows a software window titled "Customer Information" for WDA: 28 - Gulf Coast WDA. It features a search section with fields for SSN, Last, First, and TWIST ID. A "Menu Selections" tree on the left includes options like Intake - Common, Eligibility, Program Detail, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T History, Customer Calendar, Performance Data, and Common Measure. The "Public Assistance" tab is active, displaying a table with columns: DHS Case Number, DHS Client Number, Amount, Start Date, Certification Date, Named on Grant?, Currently Receiving?, and DHS Date.

	DHS Case Number	DHS Client Number	Amount	Start Date	Certification Date	Named on Grant?	Currently Receiving?	DHS Date
General Assistance			\$ 00	00/00/0000		<input type="checkbox"/>		
Refugee Assistance			\$ 00	00/00/0000		<input type="checkbox"/>		
TANF			\$ 00	00/00/0000		<input type="checkbox"/>	<input type="checkbox"/>	00/00/0000
SNAP			\$ 00	00/00/0000	00/00/0000	<input type="checkbox"/>	<input type="checkbox"/>	00/00/0000
SSI			\$ 00	00/00/0000		<input type="checkbox"/>		00/00/0000
SNAP E&T ABAWD			\$ 00				<input type="checkbox"/>	

Complete this screen only if the customer qualifies as low income for WIOA based on her receipt of public assistance (TANF, SNAP, or SSI):

- Currently receiving or a member of a family currently receiving, or
- Received or is a member of a family who received in the last six months.

The "DHS" Case and Client number can be found on the TANF or SNAP History tab. Indicate if the customer is named on the grant and if she is currently receiving public assistance.

Save.



STOP AND PRACTICE

Directions: Complete the Public Assistance tab using Sophie's Financial Aid Application.

Family Tab

Click on the Family tab. The Family Status screen displays.

The Family tab collects data on the members of the customer’s household. Complete this tab the customer is using family size/low income to meet the low income criteria to qualify for WIOA or is requesting financial aid to assist with child care. Also use this tab to add a customer to the waitlist for financial aid for child care if funds aren’t currently available.

Include all members of the “Family” based on the definition of family for the fund you are using.

The WIOA definition of family is:

Two or more individuals related by blood, marriage, or decree of court; living in a single residence; and included in one or more of the following categories:

- A married couple and dependents;
- A single individual, parent, or guardian, and dependents; or
- A married couple.

The Child Care definition of family is:

Two or more individuals related by blood, marriage, or decree of court; living in a single residence; and included in one or more of the following categories:

- A married couple and dependents;
- A single individual, parent, or guardian, and dependents.

Complete the following fields on the Family tab:

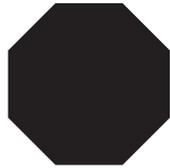
- **Family Status:** Choose the customer's position in the family from the dropdown list. If working with an individual who is a family of one, choose: 3-Other Family Member.
 - **Marital Status:** Choose the customer's marital status from the dropdown list. Note: this must be consistent with the Family Status.
 - **Dependent(s) under 18:** Enter the number of dependents in the household under 18. This is not the number of children needing child care.
 - **Number in Family:** Enter the number of family members based on the WIOA definition of family if you are tagging the customer WIOA-Adult, Dislocated Worker, or Youth.
 - **Reason for Care:** *Financial Aid for child care only.* Select the reason the customer needs financial aid for child care:
 - Employment
 - Training/Education
 - Both Employment and Training/Education
 - Protective Services
 - Federal Declared Emergency and Employment
 - Federal Declared Emergency and Training/Education
 - Federal Declared Emergency and Both Employment and Training/Education
 - Federal Declared Emergency and Protective Services
 - Homeless
- Be sure to consider all options. If the customer is in school and working, choose Both Employment and Training/Education. If any of the children are DFPS referrals, choose Protective Services.*
- **Child Care Referred By:** *Financial Aid for child care only.* Choose the funding source from the dropdown menu. If all children needing care are referred by DFPS, leave this blank. If the customer is requesting financial aid for child care based on income, choose 9-Self Referred.
 - **Special Projects (if applicable):** *Financial Aid for child care only*
 - **Eligibility Start and End Dates:** *Financial Aid for child care only* (not needed for income eligible customers)

Save.

The **Number in Family** (child care financial aid) field is a calculated field based on the number of household dependents you add under Household Dependents (below).

The **Repayment Schedule Status** (child care financial aid) field is populated if a repayment schedule was entered by FAPO. The screen will be in Read-Only view.

The **Add to Waitlist** button (child care financial aid) is used to add the customer to the waitlist when no funds are available for child care financial aid.



STOP AND PRACTICE

Directions: Complete the Family tab using Sophie's Financial Aid Application.

Household Dependents

Enter Household dependents if creating a record for child care financial aid.

From the Family tab screen, right click in the grey area under Household Dependents. The Household Dependents detail window displays.

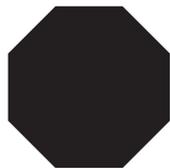
The Household Dependents Detail window captures information on each family member. The following fields are required fields for **customers requesting child care financial aid**:

- **Relationship** – If the relationship selected is Spouse, if applicable enter the:
 - Weekly School/Train Hrs and/or
 - Weekly Work Hrs
- **SSN**: The Social Security Number is not required for initial eligibility. If the customer does not have the social, leave this field blank.
- **First Name**
- **Last Name**
- **Date of Birth**: This populates the **Age** and the **Age Group** fields.
- **Child Care Required**: If you select No, you will not be able make a referral for this household dependent. When you create the program detail you can change No to Yes, but you can not change Yes to No for this field.

- **Hispanic/Latino**
- **Race**
- **Gender**
- **Citizenship**
- **Child of Foster Youth:** Receives priority if on the waitlist.
- **Child of Qualified Veteran:** Receives priority if on the waitlist.
- **Disability** – if Yes is selected, enter the:
 - Disability Code, and
 - Mo. Medical Expense (these will be deducted from the family’s gross monthly income for determining eligibility).
- **Pre-K/Head Start:** If applicable.
- **DFPS Referral** – If Yes is selected, enter the:
 - DFPS Referral Type
 - DFPS Referral Start
 - DFPS Referral End
 - DFPS Child Number

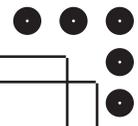
When all information has been entered, click **OK** or **New** to add additional dependents. You can also right click in the grey area under Household Dependents to add additional dependents.

Save.



STOP AND PRACTICE

Directions: Complete the Household Dependents Detail Window using Sophie’s Financial Aid Application.



Adding a Customer to the Waitlist

Since adding a customer to the waitlist involves completing the Household Dependents tab, let's stop and talk about the waitlist procedure before we view any more tabs. Customers are placed on a waitlist for child care financial aid when the demand for funds is greater than the supply. Customers with referral types TANF/Choices, or SNAP E&T are served immediately and are therefore not added to the waitlist.

When funds become available, priority is given to customers in the following order:

First Priority <i>In no particular order</i>	TANF Applicants
	TANF/Choices participants
	TANF/Choices Transitional
	SNAP E&T
Second Priority <i>In this order</i>	Parents referred by DFPS
	Qualified veteran/spouse
	Foster youth with children
	Families experiencing homelessness
	Parents on military deployment; military-funded child care is not available
	Teen parents
	Parents with children with disabilities
Third Priority <i>In this order</i>	Siblings in families receiving child care
	Parents participating in WS activities who need financial aid to complete
	All other eligible customers

Remind the customer that funds are limited and not everyone is eligible for financial aid. If appropriate, review other possible services for child care such as:

- The **Child Care Resource and Referral Service** at (832) 615-1234 or (800) 245-1255.
- **Collaboratives for Children** – This program does NOT pay for child care, but will help locate a daycare. For more information, you and/or the customer can call (713) 365-0313.
- **Child Care Licensing** – This agency does NOT pay for child care, but will provide a list of centers in Harris and surrounding counties. For more information, you and/or the customer can call (713) 94-5200.
- **Head Start** – Provides part-day (six hours) services for pre-schoolers ages 3-5. For more information, the customer should contact her local branch office.
- The local **YWCA, YMCA, churches, or other community service organizations** might provide child care or after-school programs.

Advise the customer she will receive a letter confirming her name has been added to the wait list. Remind her to notify you if her contact information changes. FASC Staff will send a confirmation letter.

To add a customer to the waitlist in TWIST, enter the customer's eligibility criteria and family members into the TWIST Intake-Common. Ensure both Mailing and Residence addresses are correct. Once entered, an "Add to Waitlist" button displays on the Family Tab in TWIST. Click it to add the customer to the wait list.

Retrieve the customer's record, and click on the Family tab. The Family Status screen displays.

The screenshot shows the 'Customer Information' window with the 'Family' tab selected. The 'Household Dependents' table is as follows:

Delete	Relationship	SSN	First Name	MI	Last Name	DOB	Age	Child Care Required	CCAA Child Number	Date Added to Waitlist	Waitlist WDA
<input type="checkbox"/>	3 - Child	---	Child		Child	---	1			07/26/2012	

Ensure at least one child is entered under Household Dependents as needing care.

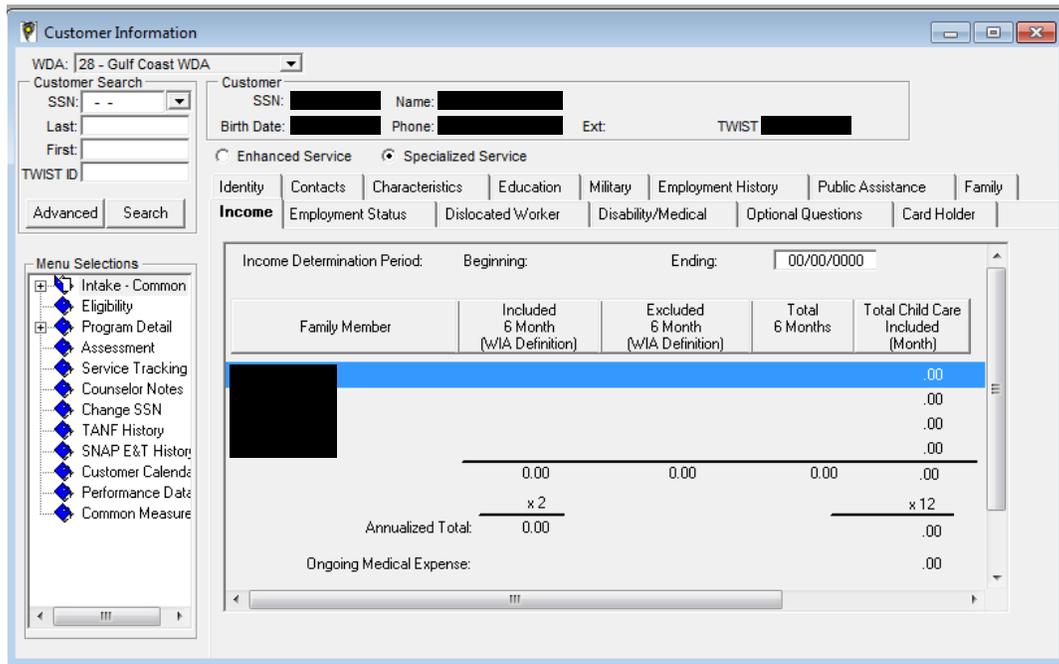
Click the Add to Waitlist button, and verify the Date Added to Waitlist column has been updated with today's date.

Save.

Verify the Waitlist WDA column populated with the WDA in which the customer resides. Since we don't purge the waitlist in the Gulf Coast region, you will not see a Waitlist Purge Date.

Income/Income Detail Tab

Click on the Income tab. The Income screen displays.



Customer Information

WDA: 28 - Gulf Coast WDA

Customer Search

SSN: - -

Last:

First:

TWIST ID:

Advanced Search

Customer

SSN: [Redacted] Name: [Redacted]

Birth Date: [Redacted] Phone: [Redacted] Ext: TWIST [Redacted]

Enhanced Service Specialized Service

Identity Contacts Characteristics Education Military Employment History Public Assistance Family

Income Employment Status Dislocated Worker Disability/Medical Optional Questions Card Holder

Income Determination Period: Beginning: Ending: 00/00/0000

Family Member	Included 6 Month (WIA Definition)	Excluded 6 Month (WIA Definition)	Total 6 Months	Total Child Care Included (Month)
[Redacted]	0.00	0.00	0.00	.00
	x 2			x 12
Annualized Total:	0.00			.00
Ongoing Medical Expense:				.00

The Income tab collects information about the family’s income to determine eligibility for Workforce Solutions financial aid. Every family member who was entered as a Household Dependent on the Family tab is listed here. This screen displays all income entered for each customer and how it is used to determine the customer’s eligibility.

- The first three columns display Included and Excluded Income for each family member used for WIOA qualification.
- The last column displays income included to determine eligibility for CCDF financial assistance.
- The Income Determination Period calculates the dates for the last twenty-six weeks, which is used to collect information for a customer to qualify for WIOA funds.
- If you are creating a TWIST record for a customer requesting financial aid for child care, return to the Family tab to add a family member not listed on the Income tab. If you are creating a TWIST record for a customer requesting scholarship only, you may add family members on this tab. The customer’s name will not be listed on the Income tab until you right click and select Add. A line for her will be created and the Income Detail screen will display.

From the Income screen, double click on a family member’s name to open the Income Detail window. If no name appears on the screen, or to add the customer’s income, right click in the grey area and select Add. The Income Detail screen displays.

Relationship	SSN	Family Member(First, Middle Initial, Last Name)			Birth Date	Age
Self	240-16-9928	IRENE	A	GANDARA	11/15/1972	45

Income Type	WIA/WIDA Prior 6 Mos. Amt	Child Care Current Monthly Amount	Comments	WIA/WIDA Included	Child Inclu
Wages/Salaries		.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employment Income		.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payments SS Act		.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Term Compensation		.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
& Dis Payments		.00		<input type="checkbox"/>	<input type="checkbox"/>
Int/Dividends		.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Old Retirement		.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pension		.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Included Income		.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cash Income		.00		<input type="checkbox"/>	<input type="checkbox"/>
Support		.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dis Assistance		.00		<input type="checkbox"/>	<input type="checkbox"/>
Employment Benefit		.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>

The Income Detail screen lists all income types used to determine eligibility for both child care and WIOA. An “X” in the box in the columns to the right of the screen indicates that income type is included in the calculation of income for that funding source. An empty box indicates the income type is excluded from the calculation.

All household members entered on the Family tab are listed at the top of the screen. The Income Detail screen is where you enter family member income. The following information automatically populates for all household members entered on the Family Tab:

- Relationship
- SSN
- First Name
- Last Name
- Birth Date
- Age (automatically calculated by Birth Date entry)

Complete all fields.

Enter income for the family member whose name is highlighted at the top of the screen. When you're finished entering income for that person, click on another family member's name at the top of the screen to enter his/her income. Do this until you have entered income for all family members.

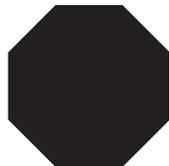
For customers tagged as WIOA, enter the income for the 26 weeks prior to the customer's application date.

For customers tagged as Child Care, enter the income, or estimated income based on check stubs provided, for the the most recent complete month.

When you have entered all income for the family, click OK. This returns you to the Income tab with the monthly and yearly totals displayed.

The screenshot shows the 'Customer Information' window with the 'Income' tab selected. The 'Income Determination Period' is set to 'Beginning: 00/00/0000' and 'Ending: 00/00/0000'. The table below shows the following data:

Family Member	Included 6 Month (w/IA Definition)	Excluded 6 Month (w/IA Definition)	Total 6 Months	Total Child Care Included (Month)
[Redacted]	13200.00			2,200.00
	7515.00			.00
	20715.00	0.00	20715.00	1,252.50
	x 2			x 12
Annualized Total:	41430.00			41,430.00



STOP AND PRACTICE

Directions: Complete the Income Detail tab using Sophie's Financial Aid Application.

Cardholder Tab (Child Care Financial Aid Only)

This tab is used to authorize additional cardholders for customers requesting financial aid for child care only and to make ongoing changes to all cardholders.

You'll need to understand the Child Care Automated Attendance (CCAA) system to better understand the purpose of the Cardholder tab and to better explain it to customers. These customers must agree to report their child's attendance and absences using the CCAA system. After care is authorized by creating a referral on the Program Detail, a message is sent to the CCAA vendor to mail an attendance card to the customer.

Timely data entry is critical to ensure parents receive their cards quickly. The parent may request up to three additional cardholders be added to her account. All cardholders must be over 18 unless they are a teen parent. The information entered here is used by the CCAA system to authorize these additional cardholders to receive attendance cards to use the system.

Upon receipt of the CCAA card, customers must call 1-866-960-6496 to select a personal identification number (PIN). They enter the 16-digit card number and their date of birth to establish the PIN. Advise customers they should memorize their PIN; and not write it down or share it with anyone. Double check the date of birth entered on the TWIST record. It has to match the one they enter in the CCAA system to establish a PIN.

Customers are also sent instructions for entering attendance and reporting absences. Refer to the CCAA technical guide for these instructions.

- If attendance is not approved through the POS or IVR, the customer may be responsible for payment of child care services.
- To reset a PIN, instruct customers to call the CCAA customer service number (1-866-960-6496)

Click on the Cardholder tab. The Cardholder screen displays.

The screenshot shows the 'Customer Information' window. The 'Customer Search' section includes fields for SSN, Last, First, and TWIST ID. The 'Customer' section displays SSN, Name, Birth Date, Phone, Ext, and TWIST ID. Below this are tabs for 'Enhanced Service' and 'Specialized Service'. The 'Card Holder' tab is selected, showing a 'Card Mailing Address' table and a 'Card Holders' table. The 'Card Holders' table has columns for First Name, Last Name, Relationship, Birth Date, Issue Date, Reissue Date, and Inactivation. A single cardholder is listed with a relationship of '2 - Spouse'. Buttons for 'Issue', 'Reissue', and 'Inactivate' are visible at the bottom of the table.

Complete the mailing address information only if cards for **all** holders, including the customer, should be sent to an address *different* from the customer's address.

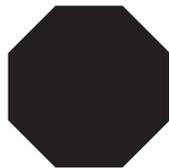
To add a cardholder:

1. Right click in the grey area and select Add.
2. Complete all cardholder information.
3. Click on the Issue button at the bottom of the screen to initiate a request for the card. A card can only be issued after the referral has been made from the Program Detail.

Use the Reissue button to request a lost or damaged card. Cards may only be reissued after five days from the date the card was issued. Use the Inactivate button to inactivate a card.

IMPORTANT NOTE:

The customer is the primary cardholder. The primary cardholder's card is issued from the Program Detail referral; not from the Cardholder tab. When the Program Detail is created, a line appears on the Cardholder tab for the primary cardholder. Use the Cardholder tab to perform all future actions on the primary card holder's card.



STOP AND PRACTICE

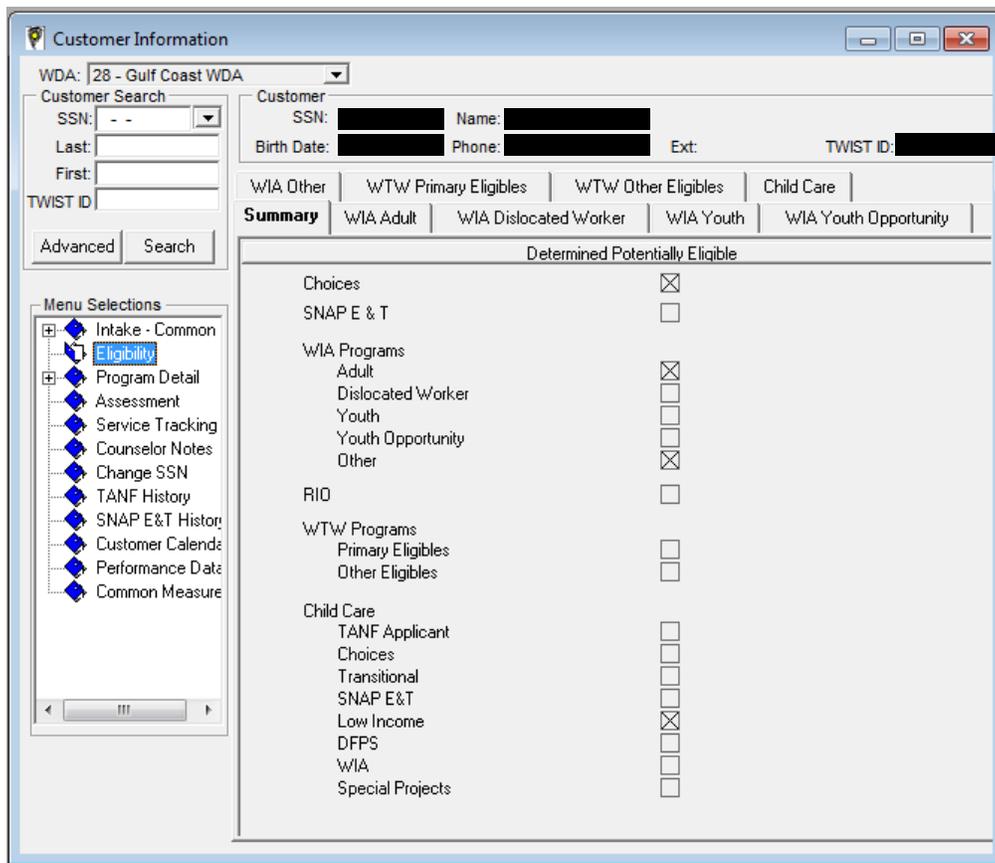
Directions: Complete the Cardholder tab using Sophie's Financial Aid Application.

Eligibility Review

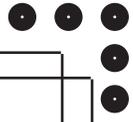
After all data is entered in Intake-Common, you can view the funding streams for which the customer may be eligible. The information entered in the Intake-Common is used to determine if the customer is potentially eligible for any or all funding streams. It's very important to remember that Intake-Common and eligibility for financial aid for child care are dynamic. When you enter new information into Intake-Common, it may cause a change in the customer's eligibility for child care financial aid.

Before you begin the process of creating a Program Detail, verify that you have all information correct in the Intake-Common and that the customer is potentially eligible for the funding you wish to use.

Click on the Eligibility Menu selection. The Eligibility Summary tab displays. *All Eligibility menu selection tabs are read-only.*



There are tabs on the Eligibility menu selection you can use to verify the customer qualifies for financial aid for any funding stream.



The Summary Tab

The Summary tab displays an “X” next to all funding sources for which the customer is potentially eligible:

- Choices
- SNAP E&T
- WIOA (TWIST still refers to WIOA)
 - Adult
 - Dislocated Worker
 - Youth
- Child Care
 - TANF Applicant
 - Choices
 - Transitional
 - SNAP E&T
 - Low Income
 - DFPS
 - WIOA
 - Special Projects

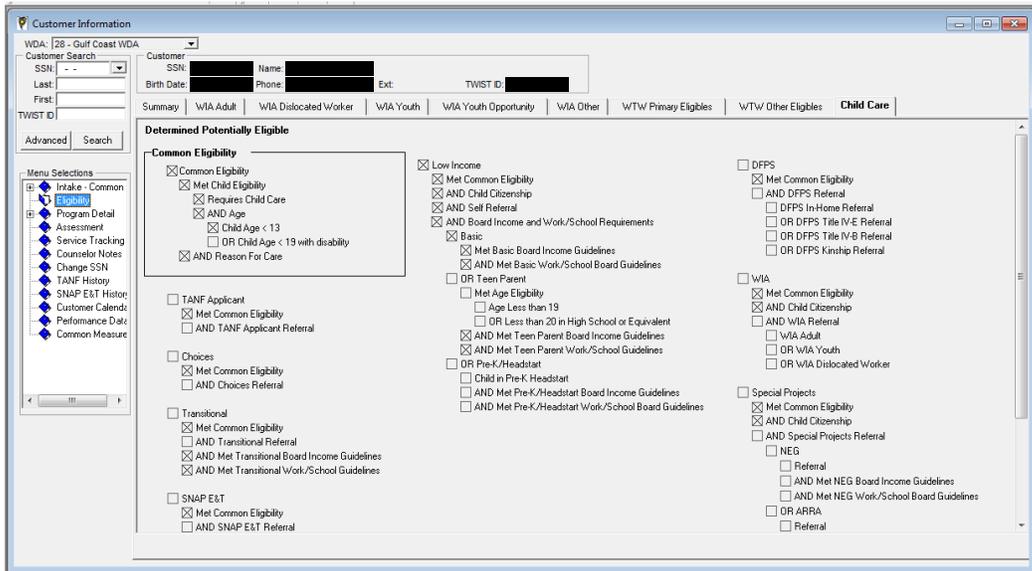
Eligibility details for each funding source are provided on the detail tabs identified by the funding source name. This allows you to view how the eligibility determinations were made.

IMPORTANT NOTE:

Eligibility information can be entered under the Program Detail for WIOA. Therefore, it is not necessary for eligibility to be established on the Intake-Common before creating a WIOA Program Detail.

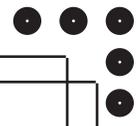
The Child Care Tab

Click on the Child Care tab. The Child Care Eligibility Detail screen displays.



This screen displays the individual qualifications needed to receive child care financial aid. Look for an X in the box next to the type of funding.

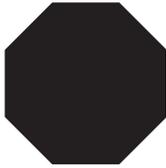
- The top left corner of the display shows a common set of eligibility criteria across all child care funding. This includes child age requirements and reason for care.
- All Child Care funding sources and the qualifying criteria for each are displayed on the rest of the screen. Each funding source lists the specific criteria that must be met to qualify for that funding type. For example, to qualify for Choices child care, all Common Eligibility Criteria must be met, and there must be a Choices Referral in the Intake-Common.
- The box next to the type of funding must be marked for the customer to qualify for child care financial aid using that funding.
- If the box next to the type of funding you want to use is not marked, determine the missing criteria and return to the Intake-Common to add the information.



IMPORTANT NOTE:

Do not create a Program Detail until you see an “X” in the appropriate box on the Eligibility menu selection.

STOP AND PRACTICE



Directions: Review Sophie’s eligibility for both child care financial aid and WIOA-Adult.

Program Detail

The next step toward establishing a financial aid record for a customer is to create a Program Detail.

A Program Detail is a “snapshot” of the information entered in Intake--Common.

- It captures eligibility characteristics from the Intake-Common and allows you to track and record services in TWIST for any funding source.
- It represents the period of eligibility for child care financial aid. You can establish one or more referrals up to the length of the eligibility on the Program Detail.
- Each Program Detail has only one eligibility characteristic which is determined from the Family Tab on the Intake Common.
- It allows you to establish eligibility for WIOA funding streams.
- It allows you to specify the customer’s Parent Share of Cost, or Parent Fee.

IMPORTANT NOTE:

When you make changes in Intake-Common, they will **not** transfer to an existing Program Detail. Therefore, **if you change information in Intake-Common that affects eligibility for child care financial aid, you must create a new Program Detail and a new referral.**

Before creating a Program Detail, verify there is not already one established. Click on the “+” sign to the left of the Program Detail menu selection. The Program Detail screen displays.

The screenshot shows the 'Customer Information' window. At the top, it displays 'WDA: 28 - Gulf Coast WDA'. Below this is a 'Customer Search' section with fields for SSN, Last, First, and TWIST ID. To the right, there are fields for Customer SSN, Name, Birth Date, Phone, Ext, and TWIST ID. The main area contains a table with the following data:

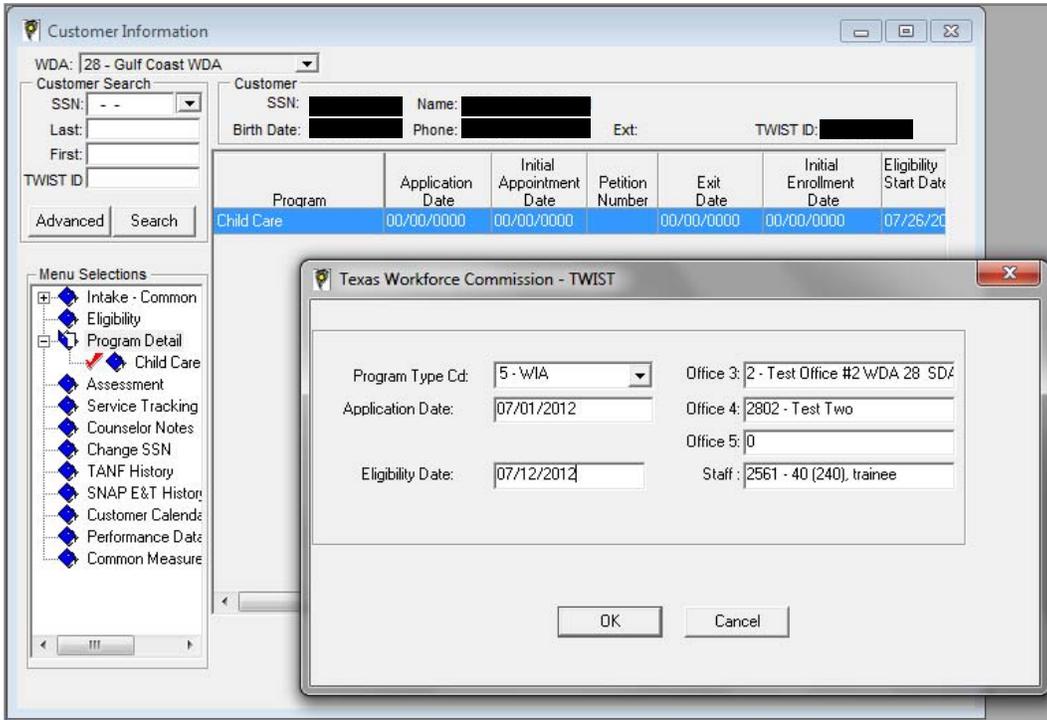
Program	Application Date	Initial Appointment Date	Petition Number	Exit Date	Initial Enrollment Date	Eligibility Start Date
WIA	07/01/2012	00/00/0000		00/00/0000	00/00/0000	00/00/00
Child Care	00/00/0000	00/00/0000		00/00/0000	00/00/0000	07/01/20

On the left side, there is a 'Menu Selections' tree. The 'Program Detail' folder is expanded, and 'WIA 07/C' and 'Child Care' are marked with red checkmarks, indicating they are open or active.

Open Program Details are indicated with a red check mark. If there is an open Program Detail for the funding stream you want to establish, confirm the information you have and take the appropriate action. You may need to close the current Program Detail and open a new one, or use the existing one. If you are unsure, or don't know what to do, get with your supervisor.

Creating a WIOA Program Detail

To add a new WIOA Program Detail, right click in the grey area and select Add. The Program Type pop-up window displays.



Complete the information in the pop-up window. Once you choose the Program Type, additional fields may display, depending on the funding source. For example:

- Program Type: WIOA - The Application Date and Eligibility Date displays.
- Application Date: Date customer completed the Financial Aid Application.
- Eligibility Date: Date the eligibility criteria is verified.
- Office 3, 4 & Staff: Update to the office who entered the assessment.

Click OK, and the Program Detail displays with the new WIOA record.

The screenshot shows the 'Customer Information' window. At the top, it displays 'WDA: 28 - Gulf Coast WDA'. Below this is a 'Customer Search' section with fields for SSN, Last, First, and TWIST ID. To the right is a 'Customer' section with fields for SSN, Name, Birth Date, Phone, Ext, and TWIST ID. The main area contains a table with the following data:

Program	Application Date	Initial Appointment Date	Petition Number	Exit Date	Initial Enrollment Date	Eligibility Start Date
Child Care	00/00/0000	00/00/0000		00/00/0000	00/00/0000	07/26/20
WIA	07/01/2012	00/00/0000		00/00/0000	00/00/0000	00/00/00

On the left side, there is a 'Menu Selections' tree with the following items: Intake - Common, Eligibility, Program Detail (expanded), Child Care, WIA 07/C, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T History, Customer Calendar, Performance Data, and Common Measure.

Save.

Click Program Detail in the left menu.

Click the WIOA Program Detail with the red check mark. The Program Summary screen displays.

The screenshot shows a software window titled "Customer Information" with a dropdown menu set to "28 - Gulf Coast WDA". On the left is a "Menu Selections" tree with "Program Detail" selected and a red checkmark. The main area shows the "Program Summary" tab with various date and status fields.

WIA Adult	WIA Disloc. Worker	WIA Youth	WIA YOG	WIA Other
Emp. Status	Disloc Worker	Disability/Medical	Exemptions	Documentation
Military	Public Asst.	Family	Income	Income Redetermination

Program Summary | Eligibility Summary | Characteristics | Certification | Education

Eligibility Determine Date: 07/12/2012 Application Date: 07/01/2012
Eligibility Expiration Date: 8/25/2012 Out of School: Age: [REDACTED]
Assessed & Approved for Intensive Services: 00/00/0000 Exit Date: 00/00/0000
Assessed & Approved for Training Services: 00/00/0000 Exit Reason: [REDACTED]
Labor Force: [REDACTED]

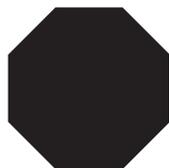
Office 3: 2 - Test Office #2 WDA 28 Program Type: WIA
Office 4: 2802 - Test Two Staff: 2561 - 40 (240).trainee
Office 5: [REDACTED] WDA: 28 Gulf Coast WDA

On the Program Summary Screen, enter the Assessed and Approved for Intensive Services Date and the Assessed and Approved for Training Services Date.

Save.

IMPORTANT NOTE:

These dates are typically the same as the Eligibility Determination Date.



STOP AND PRACTICE

Directions: Using Sophie's Financial Aid Application create a WIOA Program Detail for Sophie and complete each tab as it is covered.

Remember, information entered on the Intake-Common screen will show on the Program Detail too. Be sure to verify that all demographic and basic eligibility criteria are correct on common eligibility tabs. Complete the tabs on the Program

Detail necessary to document the eligibility criteria you have verified for your customer.

Use the following guidelines to determine which tabs to complete based on the funding stream(s) the customer has provided documentation for:

- **Adult**
 - Exemptions
 - Employment Status
 - Public Assistance - if using to qualify as low income
 - Characteristics - other low income: homeless, foster child
 - Family tab/Income tab- if using to qualify for low income, or to show “member of a family receiving public assistance or SNAP.”
 - Documentation
- **Youth**
 - Exemptions -if using a Board designated (WDA) Youth Barrier
 - Education
 - Public Assistance-if using to qualify as low income
 - Characteristics -other low income, and Youth Barriers
 - Family tab/Income tab- if using to qualify for low income, or to show “member of a family receiving public assistance or SNAP.”
 - Documentation
- **Dislocated Worker**
 - Employment Status
 - Dislocated Worker
 - Documentation

Review the eligibility requirements for each funding stream in Module One and on the tabs at the top of the Program Detail screen:

- **WIOA Adult**
- **WIOA Youth**
 - In-school
 - Out-of-school
- **WIOA Dislocated Worker**

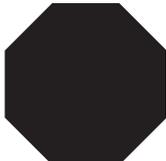
Characteristics Tab

Click on the Characteristics tab. The Characteristics screen displays.

Verify common eligibility criteria.

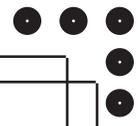
- Adult and/or Youth
 - Identify low income characteristics: homeless, free or reduced lunch, deficient in basic literacy, or foster youth by selecting “Yes” from the appropriate dropdown menu.
- Youth
 - Identify Youth barriers: homeless, deficient in basic literacy, runaway, pregnant/parenting, foster child, or offender by selecting “Yes” from the appropriate dropdown menu.

Save.



STOP AND PRACTICE

Directions: Verify/update Sophie’s information on the Characteristics tab.



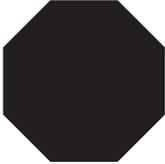
Education Tab

Click on the Education tab. The Education details screen displays.

Verify/enter highest grade completed.

- Youth
 - Select School Status from the dropdown menu. If an In-school status is chosen, select Full or Part time from the Attend School dropdown.

Save.



STOP AND PRACTICE

Directions: Verify/update Sophie's information on the Education tab.

Public Assistance Tab

Click on the Public Assistance tab. The Public Assistance screen displays.

	Amount	Certification Date	Named on Grant?	Currently Receiving?
General Assistance	\$00		<input type="checkbox"/>	
Refugee Assistance	\$00		<input type="checkbox"/>	
TANF	\$475.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SNAP	\$221.00 00/00/0000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SSI	\$00		<input type="checkbox"/>	
SNAP E&T ABAWD	\$00			<input type="checkbox"/>

- Adult / Youth

Complete only if using TANF, SSI, or SNAP receipt as the low income criteria.

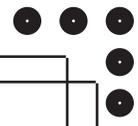
Enter the amount, or an estimate, of assistance the customer receives. Identify if the customer is named on the grant and if currently receiving by clicking on the appropriate box(es).

Save.



STOP AND PRACTICE

Directions: Verify/update Sophie's information on the Public Assistance tab.



Family Tab

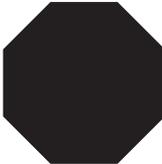
Click on the Family tab. The family information screen displays.

The screenshot shows a software window titled "Customer Information". On the left is a "Menu Selections" tree with items like Intake - Common, Eligibility, Program Detail, Child Care, WIA 07/C, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T Histoe, Customer Calende, Performance Data, and Common Measure. The "Family" tab is selected in the main area's navigation grid. The "Family" tab content includes a "Family Status" dropdown menu set to "2 - Parent in Two-Parent Fam", a "Head of Household" checkbox which is checked, and a "Number in Family" input field.

Complete this tab if the customer meets the low income qualification based on family size and income, if (s)he is meeting the low income qualification as “a member of a family receiving” SNAP or Public Assistance, or to show family size and income to qualify for little or no co-pay as a Dislocated Worker.

Enter Family Size information from the financial aid application. Choose the customer’s status in the family from the Family Status dropdown menu. Enter the number of family members determined from the financial aid application.

Save.



STOP AND PRACTICE

Directions: Verify/update Sophie’s information on the Family tab.

Income Tab

Click on the Income tab. The Income Determination screen displays with a list of family members entered as Household Dependents and Income entered on the Intake-Common screen.

Customer Information

WDA: 28 - Gulf Coast WDA

Customer Search

SSN: --

Last:

First:

TWIST ID:

Advanced Search

Menu Selections

- Intake - Common
- Eligibility
- Program Detail
 - Child Care
 - WIA 07/C
- Assessment
- Service Tracking
- Counselor Notes
- Change SSN
- TANF History
- SNAP E&T History
- Customer Calendar
- Performance Data
- Common Measure

Customer Information

Customer: SSN: [REDACTED] Name: [REDACTED]

Birth Date: [REDACTED] Phone: [REDACTED] Ext: [REDACTED] TWIST ID: [REDACTED]

Program Summary | Eligibility Summary | Characteristics | Certification | Education | Military | Public Asst.

Documentation | WIA Adult | WIA Disloc. Worker | WIA Youth | WIA YOG | WIA Other

Family | **Income** | Income Redetermination | Emp. Status | Disloc Worker | Disability/Medical | Exemptions

Income Determination Period: Beginning: 01/01/2012 Ending: 06/30/2012

Family Member	Included 6 Month (WIA Definition)	Excluded 6 Month (WIA Definition)	Total 6 Months	Total Child Included (Month)
[REDACTED]	13200.00			2,200
	7515.00			1,252
	20715.00	0.00	20715.00	3,452
	x 2			x
Annualized Total:	41430.00			41,430

If nothing was entered on the Intake-Common, a blank screen displays.

Customer Information

WDA: 28 - Gulf Coast WDA

Customer Search

SSN: --

Last:

First:

TWIST ID:

Advanced Search

Menu Selections

- Intake - Common
- Eligibility
- Program Detail
 - WIA 07/C
 - Child Care
- Assessment
- Service Tracking
- Counselor Notes
- Change SSN
- TANF History
- SNAP E&T History
- Customer Calendar
- Performance Data
- Common Measure

Customer Information

Customer: SSN: [REDACTED] Name: [REDACTED]

Birth Date: [REDACTED] Phone: [REDACTED] Ext: [REDACTED] TWIST ID: [REDACTED]

Program Summary | Eligibility Summary | Characteristics | Certification | Education | Military | Public Asst.

Documentation | WIA Adult | WIA Disloc. Worker | WIA Youth | WIA YOG | WIA Other

Family | **Income** | Income Redetermination | Emp. Status | Disloc Worker | Disability/Medical | Exemptions

Income Determination Period: Beginning: 01/01/2012 Ending: 06/30/2012

Family Member	Included 6 Month (WIA Definition)	Excluded 6 Month (WIA Definition)	Total 6 Months	Total Child C. Included (Month)
---------------	-----------------------------------	-----------------------------------	----------------	---------------------------------

- Complete this tab if the customer meets the low income qualification based on family size and Income or to show family size and income to qualify for little or no co-pay as a Dislocated Worker.
- The Income Determination Period beginning and ending date populate based on the application date. This is the 26-week period used to verify low income.
- If the customer's name is not listed on the screen, right click and select Add under the Family Member line. The Income-Detail screen displays with the customer's name populated and highlighted.

The screenshot shows two overlapping windows. The background window is 'Customer Information' with fields for WDA (28 - Gulf Coast WDA), Customer Search (SSN, Last, First, TWIST ID), and a Menu Selections tree. The foreground window is 'Income Detail' for a customer with SSN [REDACTED]. It features a table of family members and a table of income types.

Delete	Relationship	SSN	Family Member(First, Middle Initial, Last Name)	Birth Dat
<input type="checkbox"/>	1 - Self	[REDACTED]	[REDACTED]	[REDACTED]

Income Type	WIA Prior 6 Mo. Amt	Child Care Current Monthly Amount	Comments	WIA Includex
1 Gross Wages/Salaries	.00	.00		<input checked="" type="checkbox"/>
2 Self Employment Income	.00	.00		<input checked="" type="checkbox"/>
3 Reg Payments SS Act	.00	.00		<input type="checkbox"/>
4 Reg Wkm Compensation	.00	.00		<input checked="" type="checkbox"/>

- The Income Detail screen lists all income types used to determine eligibility for both child care and WIOA. An "X" in the box in the columns to the right of the screen indicates that income type is included in the calculation of income for that funding source. An empty box indicates the income type is excluded from the calculation.
- Highlight the family member you wish to attach income to. Add the income for the last 26 weeks for that family member in the **WIOA Prior 6 mo.** column next to the income type.
- To add income for other family members, highlight the name by clicking on it or, if not listed at the top of the Income-Detail screen, right click and choose Add to add a line.
- When income is entered for all family members, click OK.

Save.

The total annualized income displays.

The screenshot shows the 'Customer Information' window with the 'Income' tab selected. The 'Income Determination Period' is from 01/01/2012 to 06/30/2012. The table below shows the income breakdown for a family member.

Family Member	Included 6 Month (WIA Definition)	Excluded 6 Month (WIA Definition)	Total 6 Months	Total Child C. Included (Month)
[Redacted]	11078.00			.00
	11078.00	0.00	11078.00	.00
	x 2			x 12
Annualized Total:	22156.00			.00
Ongoing Medical Expense:				.00
Annualized Total (Less Expense)	22156.00			.00

Compare this total with the income limits for the family size on the WS Income Guidelines. If this amount exceeds the income eligibility guidelines, the customer does not meet the requirements for receiving financial aid from Workforce Solutions.

STOP AND PRACTICE

Directions: Verify/update Sophie's and other family member's income information on the Income tab.

Employment Status Tab

Click on the Employment Status tab. The Employment Status details screen displays.

Complete relevant fields.

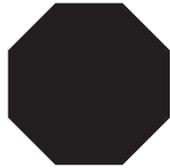
- Dislocated Worker
 - Select UI Comp. Status from the dropdown menu.

A note about Employment: A customer is employed at date of participation if, in the seven days before application, (s)he:

- Did any work at all as paid employment unless (s)he received a notice of termination of employment, or the employer has issued a WARN or other notice that the facility or enterprise will close, or (s)he is currently on active military duty and has been provided with a date of separation from military service
- Did any work at all in his/her own business, profession or farm
- Worked 15 hours or more as an unpaid worker in an enterprise operated by a member of the family

- Was not working but has a job or business from which (s)he is temporarily absent because of illness, bad weather, vacation, labor management dispute, or personal reasons, regardless of whether paid by the employer for time off and regardless of whether seeking another job

Save.



STOP AND PRACTICE

Directions: Verify/update Sophie's information on the Employment Status tab.

Dislocated Worker Tab

Click on the Disloc Worker tab. The Dislocated Worker tab displays.

The screenshot shows the 'Customer Information' window with the 'Dislocated Worker' tab selected. The window title is 'Customer Information' and the WDA is '28 - Gulf Coast WDA'. The search section includes fields for SSN, Last, First, and TWIST ID. The menu tree on the left includes options like Intake - Common, Eligibility, Program Detail, WIA 07/C, Child Care, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T Histor, Customer Calende, Performance Date, and Common Measure. The main form area contains several dropdown menus and input fields for dislocation information, including 'Planned Closure/Public Notice', 'Natural Disaster', 'Local Economic Conditions', 'Terminated/Laid Off', 'Worker Profiled and Referred', 'NAFTA/TAA', 'Unlikely to Return', 'Previous Self-Employment', 'Trade Adjustment Assistance', 'Permanent Closure/Substantial Layoff', 'Displaced Homemaker', 'Job of Dislocation Information', 'Dislocated Job Hourly Wage', 'Begin Date', 'End Date', and 'Length of Time Worked'.

- Complete only for customers who qualify as a Dislocated Worker.
- Identify eligibility criteria by selecting the appropriate response from the dropdown menu(s). For example, if the customer qualifies as a Dislocated Worker because she was Previously Self Employed, but is not longer employed because of a Natural Disaster, select "Yes" from the Previously Self Employed and Natural Disaster dropdown menus.
- Enter the Job of Dislocation employment dates.
- Enter the Dislocated Job Hourly Wage.

Save.

Since Sophie does not qualify as a Dislocated Worker there is nothing to practice on this tab.

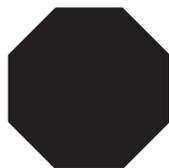
Exemptions Tab

Click on the Exemptions tab. The Exemptions screen displays.

The screenshot shows a software window titled "Customer Information" for "WDA: 28 - Gulf Coast WDA". It features a search area with fields for SSN, Last, First, and TWIST ID. A menu on the left lists various options like "Intake - Common", "Eligibility", and "Program Detail". A grid of tabs is visible, with "Exemptions" selected. The Exemptions tab contains three checkboxes: "Adult Income Exempt" (checked), "5% Window- Youth Income Exempt", and "Local WDA Youth Barrier".

- **Adult:**
 - If using family size/income to qualify the customer as low income, click the Adult Income Exempt box.
- **Youth:**
 - If using a board designated Youth Barrier, click the Local WDA Youth Barrier box.
 - If using the Youth 5% exemption instead of low income, click the 5% Window - Youth Income Exempt

Save.

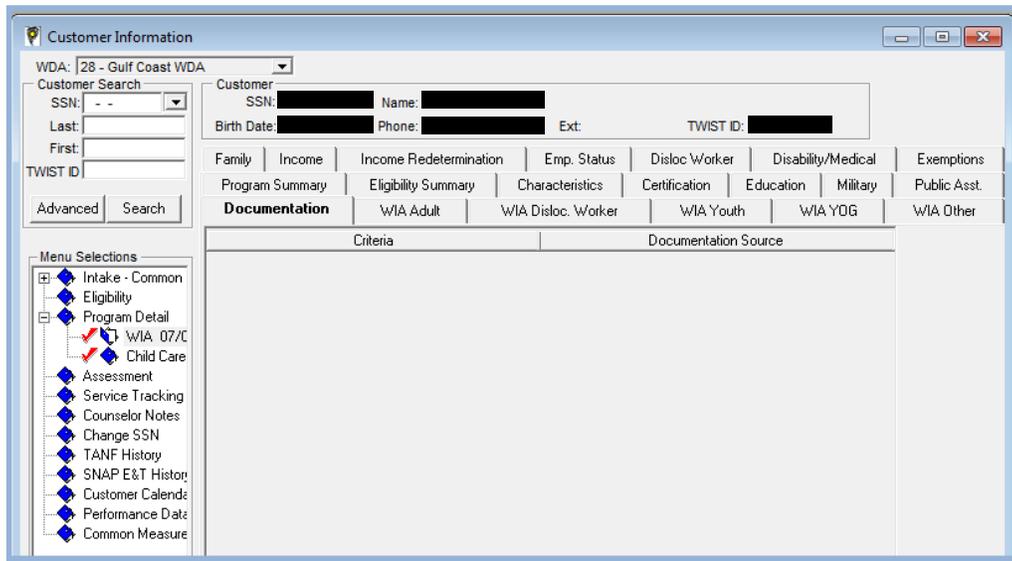


STOP AND PRACTICE

Directions: Verify/update Sophie's information on the Exemptions tab.

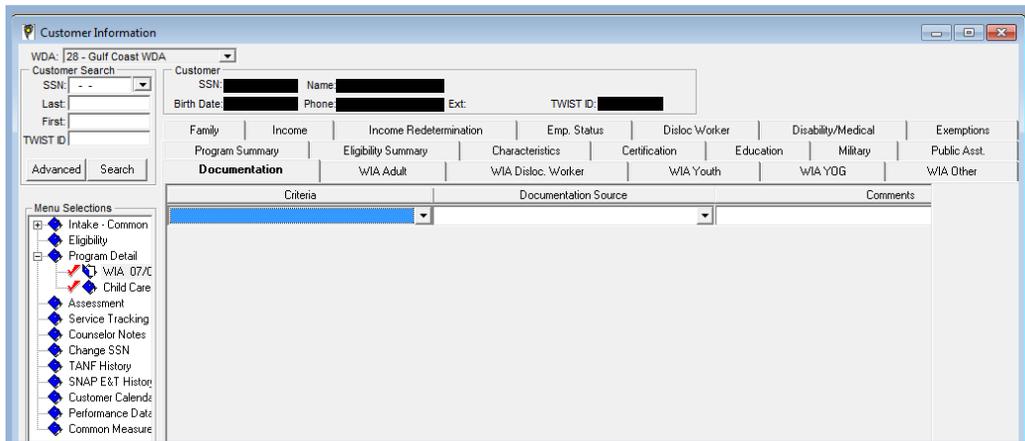
Documentation Tab

Click on the Documentation tab. The Documentation screen displays.



Use the Documentation tab to identify the “proof” the customer supplied to meet eligibility criteria. The information you supply is based on the information gathered from the customer and the criteria used for eligibility.

Right click in the grey area and select Add, to add a line. A Documentation Criteria line displays.



- Choose the criteria from the Criteria dropdown menu.
- Choose the documentation used to verify that criteria from the Documentation Source dropdown menu.
- Add comments, as needed.
- Right click and select Add to add additional lines.
- Repeat until all criteria for all funding streams are documented.

Save.

This example shows criteria for a customer who qualifies for WIOA Adult funds using Family Size/Income to meet the Low Income requirement.

Criteria	Documentation Source
2-Age	97 - Passport (U.S.)
3-Authorized to Work in the U.S.	97 - Passport (U.S.)
4-Selective Service	206 - Selective Service Internet Verification/Registration
14-Individual Family Income	98 - Pay Stub
82-Individual Family Size	208 - Self Attestation

Note: *3-Authorized to Work in the U.S.* may require multiple lines based on the documentation the customer provides, i.e. One line for Driver's license and one line for Social Security Card.



STOP AND PRACTICE

Directions: Enter the documentation Sophie supplied based on the Financial Aid Application and notes.

Confirmation

To confirm all criteria have been entered and documented, click on the tab for the appropriate funding stream.

The screenshot shows the 'Customer Information' window with the 'WIA Adult' funding stream selected. The 'Criteria' and 'Documented' columns are visible, with 'X' marks indicating that criteria have been entered and documented.

Criteria	Documented
<input checked="" type="checkbox"/> Age 18 or Older	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> AND U. S. Citizenship	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> AND Selective Service Registration	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> AND	
<input checked="" type="checkbox"/> Adult Income Exempt	<input type="checkbox"/>
<input checked="" type="checkbox"/> Or Low Income Individual	<input type="checkbox"/>
<input type="checkbox"/> General Assistance	<input type="checkbox"/>
<input type="checkbox"/> or Refugee Assistance	<input type="checkbox"/>
<input type="checkbox"/> or SSI	<input type="checkbox"/>
<input checked="" type="checkbox"/> or TANF	<input type="checkbox"/>
<input checked="" type="checkbox"/> or SNAP	<input type="checkbox"/>
<input type="checkbox"/> or Income < or = Poverty / 70%lls	<input checked="" type="checkbox"/>
<input type="checkbox"/> or Disability Barrier to Employment	<input type="checkbox"/>
<input type="checkbox"/> or Homeless	<input type="checkbox"/>
<input type="checkbox"/> or Foster Child	<input type="checkbox"/>
Determined Potentially Eligible Citizen / Eligible Non-citizen and Selective Service Registered <input checked="" type="checkbox"/>	
Determined Potentially Low Income Eligible / Exempt <input checked="" type="checkbox"/>	

The eligibility criteria screen displays for that funding stream.

- Confirm criteria have been entered, indicated by an “X” in the box to the left of the criteria.
- Confirm criteria have been documented, indicated by an “X” in the box to the right of the criteria.

Note: TWIST can only store one income eligibility rule, therefore you must verify a customer meets the income limits manually using the WS Income Guidelines. The criteria Income < or = Poverty/70% will show, unless the customer meets the Youth income limits based on family size.



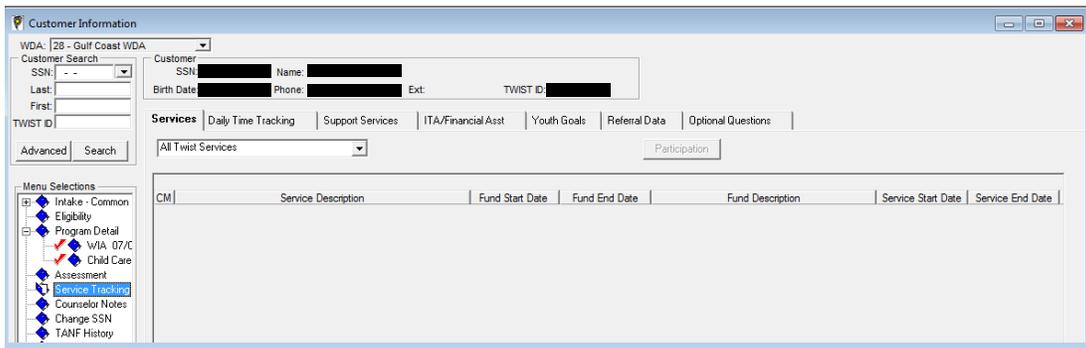
STOP AND PRACTICE

Directions: Confirm Sophie’s eligibility for WIOA-Adult.

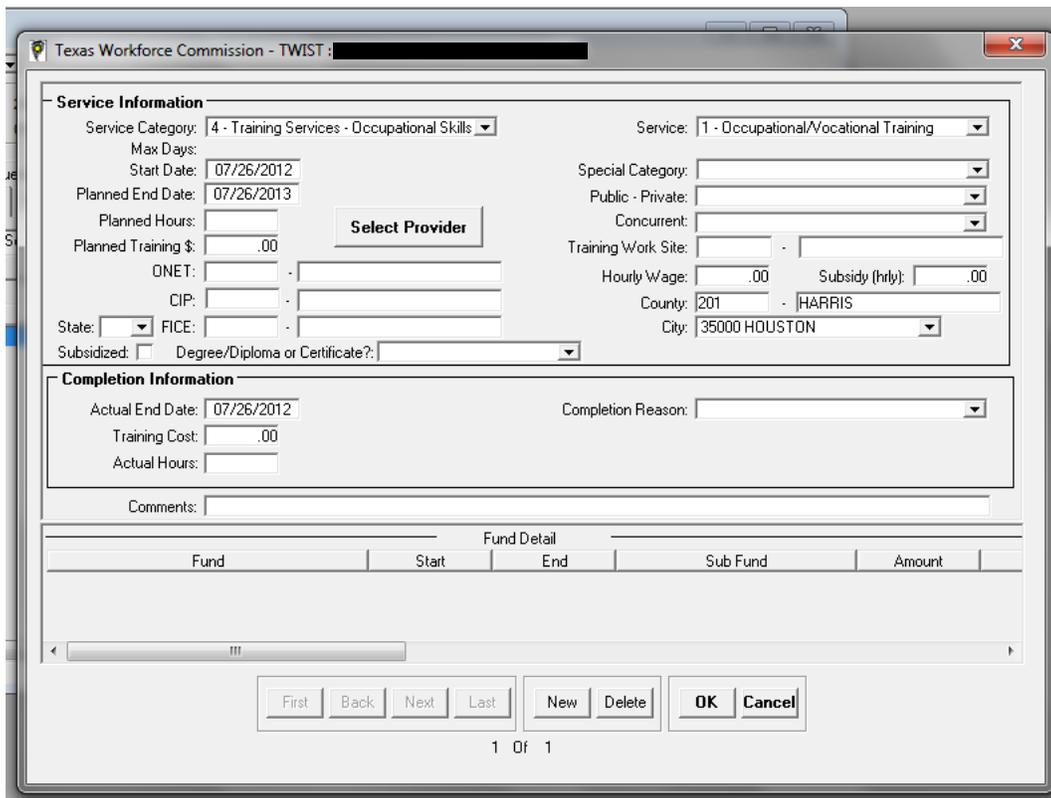
Add Services

- The next step in creating a WIOA record is to add services. This is usually done by the Tracking Units; however, you may be asked to add specific services to a record.

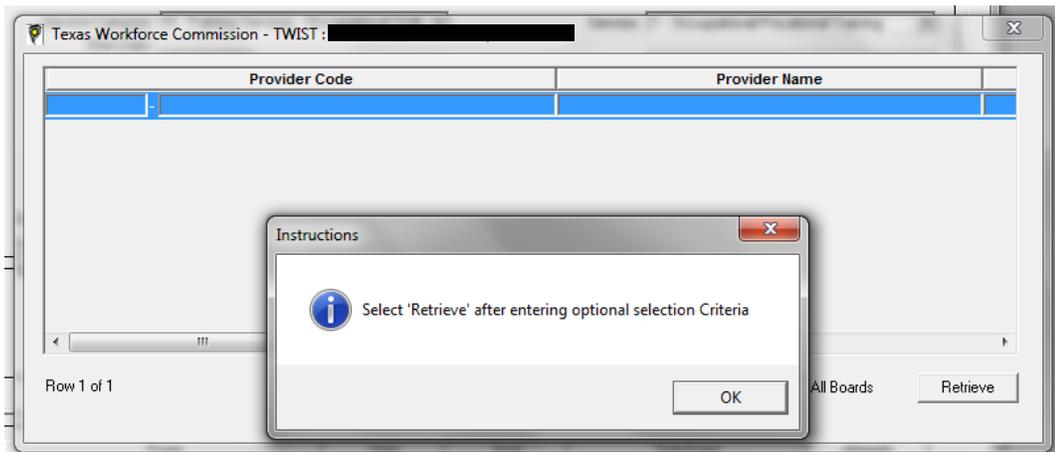
Click on Service Tracking from the left menu. The Services Tab displays.



Right click in the grey area and select Add. The service information pop-up window displays.



- Select the applicable service category from the Service Category dropdown menu.
- Select the applicable service from the Service dropdown menu.
- Enter the Start Date and Planned End Date. (Hit the “tab” key to automatically populate the end date with the time limit of the service.)
- The County and City Codes will populate if set in staff tools. Change or enter these codes, if necessary, to match the training location.
- If adding a training service, indicate if the training will result in a Degree or Diploma in the Degree/Diploma Credential box by choosing Yes or No.
- The Select Provider button displays for certain types of training including Occupational Skills training. To select the provider, click on the Select Provider button. A message box displays reminding you to “Select ‘Retrieve’ after entering optional selection Criteria.”



Click “OK”. Click “Retrieve”. The provider screen displays with a list providers.

Workforce Solutions Financial Aid

Service Information

Texas Workforce Commission - TWIST : [REDACTED]

Provider Code	Provider Name
000719	Kingwood College (NHMCCD)

Row 1 of 3254

OK Cancel All Boards Query

- Scroll to find the correct school, location and program name. (You can rearrange the list by clicking on the column headers.)
- Highlight the chosen provider and click "OK". The Service Information screen re-displays and the Select Provider button changes to Provider Selected. The Classification of Instructional Programs (CIP) and Federal Interagency Committee on Education (FICE) codes populate based on the provider and program selected.

Texas Workforce Commission - TWIST : [REDACTED]

Service Information

Service Category: 4 - Training Services - Occupational Skills Service: 1 - Occupational/Vocational Training

Max Days: Start Date: 07/26/2012 Special Category: Public - Private: Concurrent: Training Work Site: Hourly Wage: .00 Subsidy (hrly): .00

Planned End Date: 07/26/2013

Planned Hours: Planned Training \$: .00 **Provider Selected**

ONET: 11102100 - General and Operations Manage
CIP: 520201 - BUSINESS ADMIN. & MGMT., i
State: TX FICE: 010633 - HOUSTON COMMUNITY COLL
County: 201 - HARRIS City: 35000 HOUSTON

Subsidized: Degree/Diploma or Certificate?: 1 - Yes

Completion Information

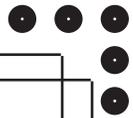
Actual End Date: 07/26/2012 Completion Reason: Training Cost: Actual Hours:

Comments:

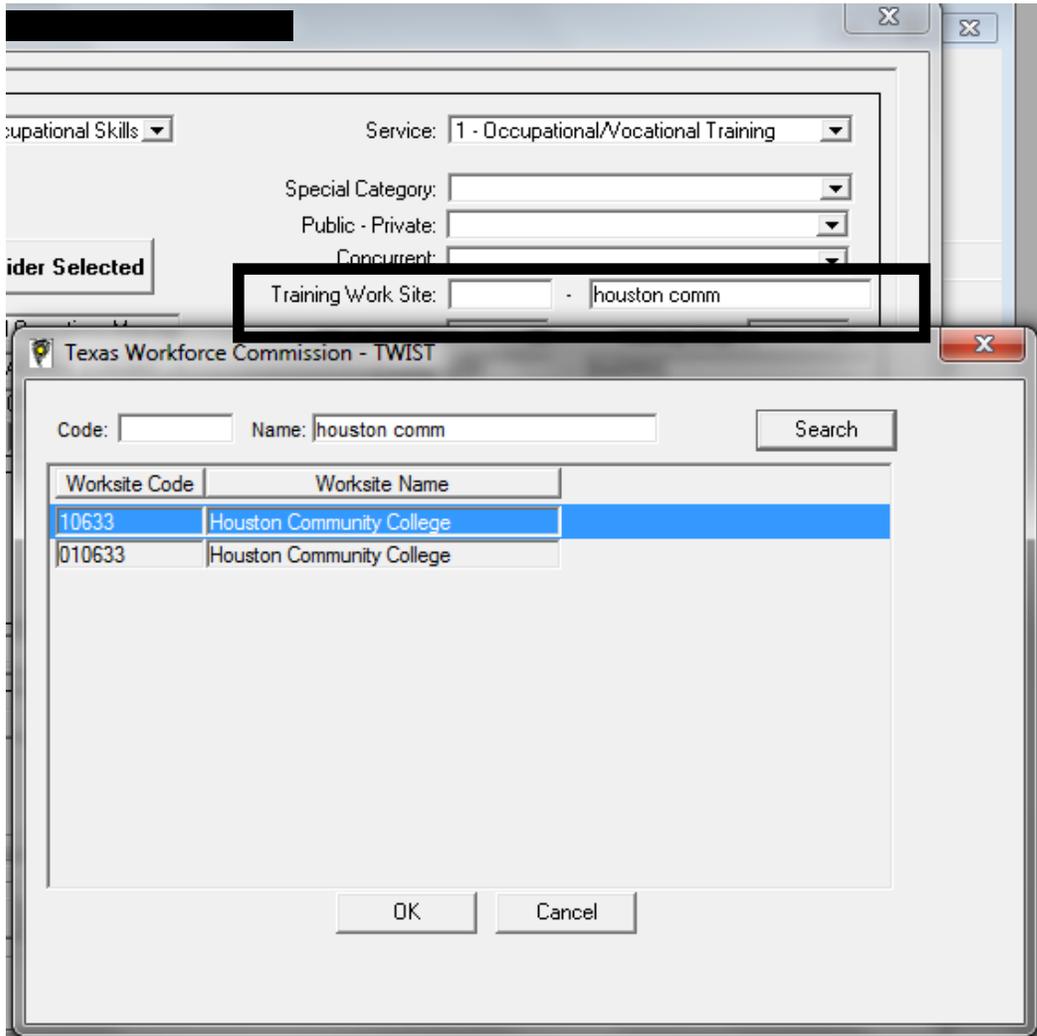
Fund Detail				
Fund	Start	End	Sub Fund	Amount
[Empty]				

First Back Next Last New Delete OK Cancel

1 Of 1



Type in the name of the provider in the second Training Work Site field and press Enter. A pop-up window displays the available training sites.

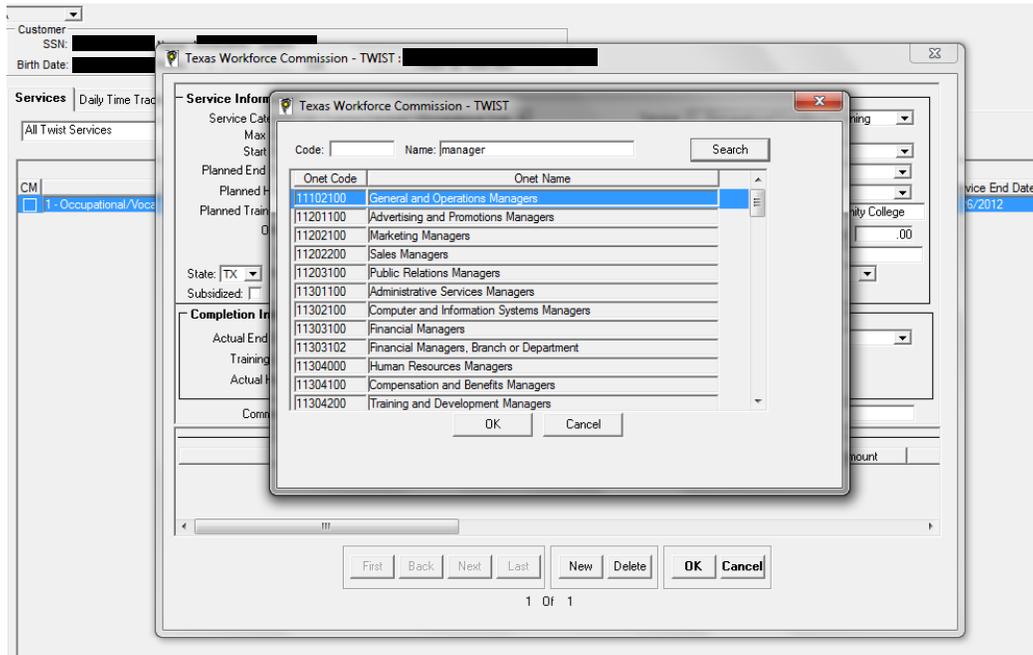


- Highlight the correct provider line and click "OK". The Service Information screen re-displays with the Training Work Site number.

IMPORTANT NOTE:

If you are unable to locate the correct training site, contact Philip Garcia; philip.garcia@wrksolutions.com or (713) 627-3200.

- Type in the O*NET job title in the second O*NET field and press Enter. A pop-up window displays.



Highlight the correct Job Title/Description and click OK. The Service Information screen re-displays with the O*NET number.

Service Information

Service Category: 4 - Training Services - Occupational Skills Service: 1 - Occupational/Vocational Training

Max Days: Start Date: 07/26/2012 Special Category: Public - Private: Concurrent: Training Work Site: 10633 - Houston Community College

Planned End Date: 07/26/2013 Hourly Wage: .00 Subsidy (hrly): .00

Planned Hours: Planned Training \$: 00 **Provider Selected**

O*NET: 11102100 - General and Operations Manag

DIP: 020201 - BUSINESS ADMIN. & MGMT. State: TX FICE: 010633 - HOUSTON COMMUNITY COLL County: 201 - HARRIS City: 35000 HOUSTON

Subsidized: Degree/Diploma or Certificate?: 1 - Yes

Completion Information

Actual End Date: 07/26/2012 Completion Reason: Training Cost: .00 Actual Hours:

Comments:

Fund Detail				
Fund	Start	End	Sub Fund	Amount

1 Of 1

First Back Next Last New Delete OK Cancel

- Under the “Planned Training \$” field, enter a “0” if the customer is receiving an educational or training service NOT funded with Workforce Solutions funds. Enter “99” if the customer is receiving financial aid from Workforce Solutions.

- Go down to the grey area under Fund Detail and right click to Add. A Fund Detail Line displays.

The screenshot shows the 'Texas Workforce Commission - TWIST' application window. It contains two main sections: 'Service Information' and 'Completion Information'. Below these is a 'Fund Detail' table and a set of navigation buttons.

Service Information

Service Category: 4 - Training Services - Occupational Skills
 Service: 1 - Occupational/Vocational Training
 Max Days: []
 Start Date: 07/26/2012
 Planned End Date: 07/26/2013
 Planned Hours: []
 Planned Training \$: .00
 ONET: 11102100 - General and Operations Manage
 CIP: 520201 - BUSINESS ADMIN. & MGMT...
 State: TX
 FICE: 010633 - HOUSTON COMMUNITY COLL
 Subsidized: Degree/Diploma or Certificate?: 1 - Yes

Completion Information

Actual End Date: 07/26/2012
 Training Cost: .00
 Actual Hours: []
 Completion Reason: []

Fund Detail

Fund	Start	End	Sub Fund	Amount
[]	07/26/2012	00/00/0000	[]	.00 2 - Te

Buttons: First, Back, Next, Last, New, Delete, OK, Cancel

1 Of 1

- Select the hardest to qualify for funding for which you have documentation. The Start Date defaults. Do not enter an End Date until you are no longer providing the service.
- Scroll to the right, and make sure the correct office level 3 and 4 and staff name are correct.
- Click **New** to add additional lines to indicate other funding streams for which the customer qualifies.
- Click "OK". The Service Description screen displays with the service (s) added.

Module 2: Creating and Updating the Customer Record

Customer Information

WDA: 28 - Gulf Coast WDA

Customer Search

SSN: --

Last:

First:

TWIST ID:

Advanced Search

Customer

SSN: [REDACTED] Name: [REDACTED]

Birth Date: [REDACTED] Phone: [REDACTED] Ext: TWIST ID: [REDACTED]

Services: Daily Time Tracking | Support Services | ITA/Financial Asst | Youth Goals | Referral Data | Optional Questions

All Twist Services

CM	Service Description	Fund Start Date	Fund End Date	Fund Description
<input checked="" type="checkbox"/>	1 - Occupational/Vocational Training	07/27/2012	00/00/0000	96 - WIA Dislocated Worker (W
<input checked="" type="checkbox"/>	68 - Employability Development Plan	07/21/2012	07/21/2012	96 - WIA Dislocated Worker (W

Menu Selections

- Intake - Common
- Eligibility
- Program Detail
 - WIA 07/C
 - Child Care
- Assessment
- Service Tracking
- Counselor Notes
- Change SSN
- TANF History
- SNAP E&T Histor
- Customer Calend
- Performance Dat
- Common Measure

Save.

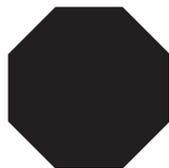
A pop up reminds you to create the ITA. Click Ignore And Save.

Texas Workforce Commission - TWIST

Double-Click on a row for additional information on the specified error

Error Code	Error No	Severity	Error Description
SVSD	00094	1	WIA WARNING: ITA Section on the ITA/Financial Assistance Tab must be completed TWIST ID: [REDACTED] Service ID: 2 Service: 1 Service Start Date: 07/26/2012 Fund Source: 96 Fund Source Start Date: 07/26/2012

Ignore And Save | Close (No Save) | Print



STOP AND PRACTICE

Directions: Add the services to indicate Sophie began the RN program and HCC, a week ago last Monday.

Creating a Child Care Program Detail

Remember, before you create a Program Detail for child care, TWIST must show the customer potentially eligible on the Eligibility menu selection.

1. The first step in creating a Program Detail is to enter the Program Summary information.

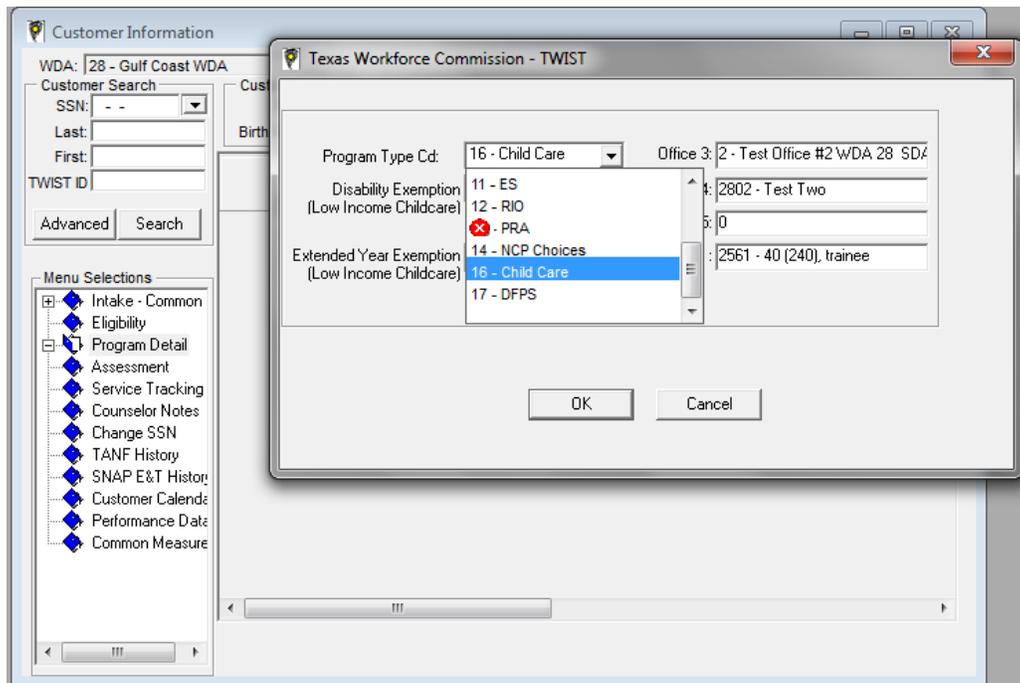
Click on the Program Detail menu selection. The Program Detail screen displays.

The screenshot shows a software window titled "Customer Information". At the top, there is a dropdown menu for "WDA" set to "28 - Gulf Coast WDA". Below this is a "Customer Search" section with fields for "SSN" (set to "--"), "Last", "First", and "TWIST ID". There are "Advanced" and "Search" buttons. To the right, a "Customer" section contains fields for "SSN", "Name", "Birth Date", "Phone", "Ext", and "TWIST ID".

Below the search fields is a "Menu Selections" tree view. The "Program Detail" option is selected and highlighted. Other menu items include "Intake - Common", "Eligibility", "Assessment", "Service Tracking", "Counselor Notes", "Change SSN", "TANF History", "SNAP E&T History", "Customer Calendar", "Performance Date", and "Common Measure".

The main area of the window is a table with the following headers: "Program", "Application Date", "Initial Appointment Date", "Petition Number", "Exit Date", "Initial Enrollment Date", and "Eligibility Start Date". The table body is currently empty.

Right click in the grey area and select Add. The Program Type pop-up screen displays.



To create a Child Care Program Detail, select one of the following from the Program Type dropdown menu:

- 16 – Child Care (children not referred by DFPS)
- 17 – DFPS (children referred by DFPS)

One Program Detail for all children of the parent needing care is sufficient, unless it is a DFPS referral. In that case, create a Program Detail for each DFPS-referred child. For example, Karen has four children requiring care -- two foster children referred by DFPS and two children of her own. You will need to create a total of three Program Details -- one for each of the foster children and one for her own two children.

If the Program Detail is for a child referred by DFPS, the Select Child dropdown displays the child(ren) listed under Household Dependents and identified as DFPS-referred. Select the appropriate child by clicking on his/her name from the dropdown. If the child's name is not on the list, click Cancel, and return to the Intake Common to make the necessary corrections.

The screenshot shows the 'Texas Workforce Commission - TWIST' dialog box. The 'Program Type Cd' is set to '17 - DFPS'. The 'Select Child (DFPS Childcare)' dropdown is open, showing a list of names. The 'Office 3' field is '2 - Test Office #2 WDA 28 SD4', 'Office 4' is '2802 - Test Two', 'Office 5' is '0', and 'Staff' is '2561 - 40 (240), trainee'. The 'OK' and 'Cancel' buttons are visible at the bottom of the dialog.

- Choose your Office 3: The contractor operating the career office.
- Choose your Office 4: The name of the career office.
- Staff: Choose the staff working with the customer.
- Click OK.

DO NOT SAVE.

- Click on the plus sign to the left of Program Detail in the Menu Selections. A dropdown displays with all Program Details associated with this customer. Open Program Details are indicated by a red check mark.

The screenshot shows the 'Customer Information' window. At the top, it displays 'WDA: 28 - Gulf Coast WDA'. Below this is a 'Customer Search' section with fields for SSN, Last, First, and TWIST ID, along with 'Advanced' and 'Search' buttons. To the right, the 'Customer' information is shown, including SSN, Name, Birth Date, Phone, Ext., and TWIST ID. The main area contains a table with the following data:

Program	Application Date	Initial Appointment Date	Petition Number	Exit Date	Initial Enrollment Date	Eligibility Start Date
Child Care	00/00/0000	00/00/0000		00/00/0000	00/00/0000	07/26/20

On the left side, the 'Menu Selections' tree is expanded to show 'Program Detail' with a red check mark next to it. Other menu items include Intake - Common, Eligibility, Child Care, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T History, Customer Calendar, Performance Data, and Common Measure.

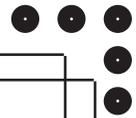
Click on the Program Detail under the menu selection to open it. The Program Summary screen displays.

The screenshot shows the 'Customer Information' window for WDA: 28 - Gulf Coast WDA. The 'Program Summary' tab is active. The 'Eligibility End Date' field is highlighted with a red box and contains the date 07/25/2013. Other fields include Eligibility Start Date (07/26/2012), Eligibility Characteristics (10 - Low Income), and Termination Date (00/00/0000). The 'Menu Selections' list on the left includes 'Program Detail' and 'Child Care'. The 'Mailing' and 'Residence' table at the bottom is also highlighted with a red box.

	Address	City	State	Zip	Cc
Mailing	[REDACTED]	AUSTIN	TX	24028	201 - HARR
Residence (Same)	[REDACTED]	AUSTIN	TX	24028	201 - HARR

The Eligibility Start date automatically populates with today's date if **Referred By** in the Intake Common is "Self Referred." The Eligibility End Date automatically populates with today's date plus 12 months.

For a new customer, the end date of the eligibility period will be the last day of the last month of eligibility. For example, if a customer is eligible to begin receiving child care financial aid on August 15, 2017, the end date of the eligibility period is August 31, 2018. Change the Eligibility End date, as needed.



IMPORTANT NOTE:

If the Start Date needs to be different than the system date, you must make the change on the Program Summary **before you save**. If you change the Start Date, you have to change the End Date to be within the Board's eligibility redetermination period.

Verify the address information. You must have both a mailing and residence address for customers requesting financial aid for child care.

Save.

Many of the tabs on the Program Detail are Read Only. You can use these tabs to view the information in Intake-Common at the time the Program Detail was created.

Read-Only tabs are:

- Eligibility Summary
- Eligibility Detail
- Characteristics
- Employment History
- Education
- Income

Click on the Family tab. The Family Information screen displays.

The screenshot shows the 'Customer Information' window with the 'Family' tab selected. The 'Family' section includes fields for Family Status (2 - Parent in Two-Parent Family), Marital Status (2 - Married), and dependent children information. Below this is a table listing family members.

Delete	Relationship	SSN	First Name	MI	Last Name	DOB	Age	Child Care Required	CCAA Child Number
<input checked="" type="checkbox"/>	2 - Spouse	- -					54	2 - No	
<input type="checkbox"/>	3 - Child	- -					10	1 - Yes	1
<input type="checkbox"/>	3 - Child	- -					5	1 - Yes	2
<input type="checkbox"/>	3 - Child	- -					1	1 - Yes	3

Double click on a Household member's name. The Household Dependent Detail screen displays.

Editable fields are:

- Child Care Required. You can change this from No to Yes, but cannot change it from Yes to No.
- Disability: You can change this from No to Yes, but cannot change it from Yes to No.
- Disability Code.



STOP AND PRACTICE

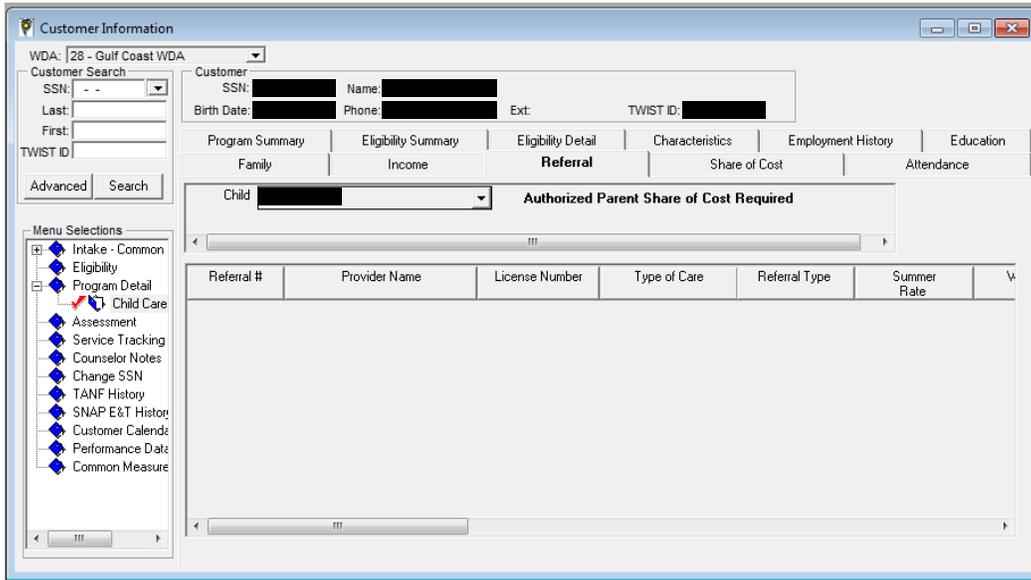
Directions: Create a Program Detail for Sophie so you can make referrals to care for her children.

Use today's date as the start date. For training, leave the Office 3, Office 4, and Staff as the default.

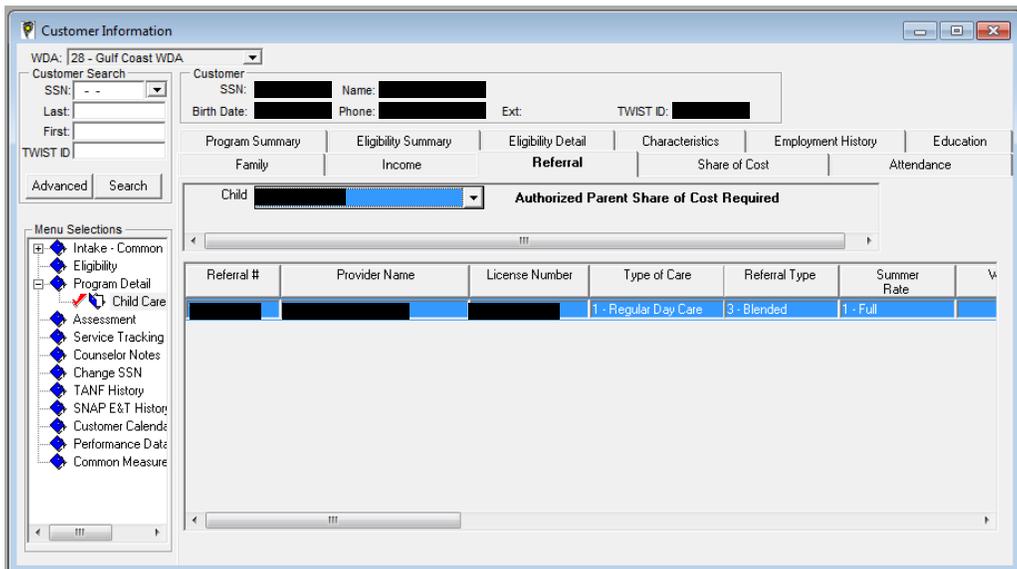
Making Referrals

Referrals to authorize child care are made and changed on the Referral tab. Timely data entry is critical to ensure parents receive their CCAA cards and can report their child's attendance.

Click on the Referral tab. The Referral Screen displays.



Choose the child for whom you are creating a referral from the dropdown menu on the top left of the tab screen. All referrals for the child will display.



IMPORTANT NOTE:

It is not necessary to choose the child from the dropdown menu if the child was referred by DFPS.

To add a new referral, right click and select Add. The Referral Detail screen displays.

Referral Detail

Press Enter to search by Provider Name or License Number

Child: [Redacted]

Provider Name: [Text Field]

License Number: [Text Field] **Search**

Type of Care: [Dropdown]

Referral Type: [Dropdown]

Summer Rate: [Dropdown]

Weekend Rate: [Dropdown]

Start Date: 00/00/0000

End Date: 00/00/0000

Transportation Required: [Dropdown]

Inclusion Rate: [Text Field] %

Variable Schedule: Days: [Text Field]

Expected Return Date: 00/00/0000

End Reason: [Dropdown]

Inactive Date: 00/00/0000

Days Of the Week:

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Office/Staff Assignment(optional):

Office 3: 2 - Test Office #2 w/Dv

Office 4: 2802 - Test Two

Office 5: [Dropdown]

Staff: 2561 - 40 (240), trainee

Fix Reason: [Dropdown]

OK Cancel

Complete the Referral Detail information.

- **Provider Name:** Enter the provider name, or part of the name, to do a provider search. Only providers that meet the search criteria, have a valid provider agreement, serve the child age group, and have rates for the type of care will display.
- **License Number:** Will automatically populate if you've searched for the provider. You can also enter the provider's license number to populate the Provider Name field.
- **Type of Care:**
 - Regular Day Care
 - Regular Night Care
 - Weekend Day Care
 - Weekend Night Care

- **Referral Type:**
 - Full - 6 to 12 hours of care
 - Part - less than 6 hours of care each day
 - Blended: Before/After school, holidays, and school breaks. If using a Blended Referral Type, you must also enter a **Summer Rate** of either:
 - Full
 - Part-Time
- **Weekend Rate:** Enter Full or Part-Time for weekend care.
- **Start Date:** Enter the date care is to begin.
- **End Date:** Enter the date care is to end.
- **Transportation Required:** Indicate whether the child needs transportation to and/or from the care facility.
- **Inclusion Rate:** Mark the check box if the child has a disability and needs specialized staff. The text box automatically populates with 190%.
- **Variable Schedule:** Use when the parent is not on a fixed schedule or works a rotating work week.
 - Click in the box to indicate a variable schedule.
 - Enter the **number of days** care is needed. This number must be one day less than the number of days checked in the Days of the Week field. For example, if all seven days (Sunday through Saturday) are selected in Days of the Week, the maximum number of days in the Days field must be six.
- **Days of the Week field:** Check the box next to each day of the week care is needed.

- **Expected Return Date:** Enter the date the child is expected to return to care, if there is an expected temporary suspension, for example, the child goes away for the summer.
- **End Reason:** Choose the appropriate reason from the dropdown menu: If you have entered an Expected Return date, enter 1-Suspension.
- **Fix Reason:** If you make an error after entering the referral and need to create a new one, choose one of the reasons from the dropdown. You can only do this within seven days of the start date.
- **Office/Staff Assignment:** Enter the office and staff working with the customer.

Below is an example of a completed Referral Detail screen.

The screenshot shows a window titled "Referral Detail" with the following fields and values:

- Child:** [Redacted]
- Provider Name:** Day Care Center 1240
- License Number:** [Redacted]
- Type of Care:** 1 - Regular Day Care
- Referral Type:** 1 - Full
- Summer Rate:** [Dropdown]
- Weekend Rate:** [Dropdown]
- Start Date:** 07/26/2012
- End Date:** 06/30/2013
- Transportation Required:** 2 - No
- Inclusion Rate:** %
- Variable Schedule:** Days: [Dropdown]
- Expected Return Date:** 00/00/0000
- End Reason:** [Dropdown]
- Inactive Date:** 00/00/0000
- Days Of the Week:**
 - Sunday
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
- Office/Staff Assignment(optional):**
 - Office 3: 2 - Test Office #2 WD
 - Office 4: 2802 - Test Two
 - Office 5: [Dropdown]
 - Staff: 2561 - 40 (240), trainee
- Fix Reason:** [Dropdown]

Buttons:

IMPORTANT NOTE:

You can update Transportation and Inclusion on the Referral tab at any time. All other fields are editable up to seven days after the Start Date.



STOP AND PRACTICE

Directions: Add a referral for the Johnson children using Sophie's Financial Aid Application and the following information:

- Sophie goes to school during the week and works part-time Monday through Friday.
- The children will all attend the same Day Care Center: (Day Care Center 1_ _ _ (Last three digits User ID)). Care needs to begin tomorrow, and you can authorize financial aid for eleven months.
- Isaac needs after school care, and has a hearing impairment. He does not need transportation.
- Laurel is attending a public pre-K program and does need transportation.
- Savanna needs full-time care.
- Leave all office and staff identifying information as the defaults.

Parent Share of Cost

Some working customers are required to contribute to the cost of child care. The contribution amount is a percentage of the customer's gross income, assessed on a sliding scale. (See Module 1) Enter the customer's share of cost on the Parent Share of Cost tab.

Click on the Parent Share of Cost tab. The Parent Share of Cost screen displays with a system-generated value for each month of care during an eligibility period.

The screenshot shows the 'Customer Information' window for WDA | 28 - Gulf Coast WDA. The 'Parent Share of Cost' tab is active. A table titled 'Copy System Calculations' displays the following data:

		System	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb
System		\$69	\$380	\$380	\$380	\$380	\$380	\$380	\$380	\$
Authorized		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Below the table, there is a 'Subsidy' section with columns for Provider, Subsidy Amount, Start Date, and End Date.

This value is determined based on board area standards and any adjustments. The eligibility characteristic on the Program Summary tab determines if there is a parent share of cost. If the eligibility characteristic is:

- **Low Income:** Calculate the parent share of cost.
- **TANF Applicant:** Calculate the parent share of cost.
- **Transitional:** Calculate the parent share of cost.
- **Special Projects:** Calculate the parent share of cost.
- **WIOA Adult/Youth/DW:** Do not calculate parent share of cost. Display \$0 for system calculation.
- **Other Non-TWC:** Calculate the parent share of cost.

If the eligibility characteristic is **Choices** or **SNAP E&T**, there is no parent share of cost. The following message displays.

Parent Share of Cost

**Parent Share of Cost is NOT applicable for Choices and SNAP E&T eligibility characteristics.
The Parent Share of Cost will display for other eligibility characteristics after referrals are saved.**

There are three options on the parent share of cost screen from which you can choose:

- Copy and accept the system values,
- Copy and change the system-generated values, or
- Enter all the values manually.

Use the System Calculation for the parent share of cost **unless** the customer's family size is more than six. To copy the parent share of cost TWIST calculated, click the Copy System Calculations button. This populates the "Authorized" row with the system-generated values. TWIST automatically pro-rates the first month.

The screenshot shows the 'Customer Information' window with the 'Parent Share of Cost' section active. The 'Copy System Calculations' button is highlighted. Below it is a table showing system and authorized values for each month.

		System	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb
System		\$69	\$380	\$380	\$380	\$380	\$380	\$380	\$
Authorized		\$69	\$380	\$380	\$380	\$380	\$380	\$380	\$
Provider Name	WDA	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb
System	Day Care Center 1240 - 312800	28 - Gulf Coast WDA	\$69	\$380	\$380	\$380	\$380	\$380	\$
Authorized	Day Care Center 1240 - 312800	28 - Gulf Coast WDA	69.0000	\$380	\$380	\$380	\$380	\$380	\$

Below the table is a 'Subsidy' section with fields for Provider, Subsidy Amount, Start Date, and End Date.

From here you can change the values for each month, based on board or provider discounts. If the system generated values should all be different, you can enter the parent share of cost manually in each editable field.

The TWIST calculated parent share of cost does not calculate the board discount for a family with more than six members. Use the Workforce Solutions **Discount to Parent Share of Cost Desk Aid** to calculate the appropriate parent share of cost if the family is seven or larger and enter it manually into the TWIST Parent Share of Cost tab. Copy the completed worksheet into the customers TWIST Counselor Notes.

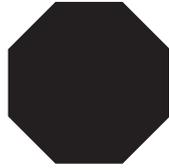
If the customer has chosen more than one child care provider for her children additional lines will display with the parent share of cost distributed among the different providers next to the System Calculations.

The screenshot shows the 'Parent Share of Cost' tab in the TWIST software. The interface includes a menu on the left with options like 'Intake - Common', 'Eligibility', 'Program Detail', 'Child Care', 'Assessment', 'Service Tracking', 'Counselor Notes', 'Change SSN', 'TANF History', 'SNAP E&T History', 'Customer Calendars', 'Performance Data', and 'Common Measure'. The main area displays customer information and a table for 'Parent Share of Cost'.

Provider Name		WDA	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar
System	Day Care Center 1220 - 31280C	28 - Gulf Coast WDA	\$14	\$31	\$31	\$31	\$31	\$31	\$31	\$31
Authorized	Day Care Center 1220 - 312800	28 - Gulf Coast WDA	\$33	\$75	\$75	\$75	\$75	\$75	\$75	\$75
System	Day Care Center 1240 - 31280C	28 - Gulf Coast WDA	\$19	\$44	\$44	\$44	\$44	\$44	\$44	\$44
Authorized	Day Care Center 1240 - 312800	28 - Gulf Coast WDA	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Below the table is a 'Subsidy' section with columns for Provider, Subsidy Amount, Start Date, and End Date.

Work with the customer to determine which provider will receive the parent's share-of-cost payment. Manually enter the total System Calculation into the appropriate provider Authorized share of cost line, and ensure \$0 share of cost is entered on the other provider Authorized lines, as shown in the example above.



STOP AND PRACTICE

Directions: Copy the System Calculations for Sophie’s Parent Share of Cost.

Printing Referral Forms

You can print the Authorization for Child Care Enrollment Selected Referral (2450) from the Referral tab.

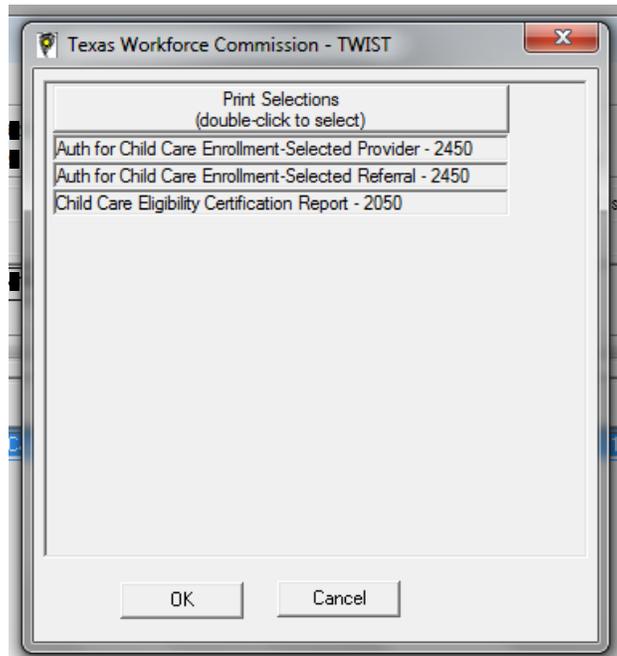
If the customer is responsible for a portion of the cost of child care, print the authorization for care form after you have entered the parent’s share of cost on the Share of Cost tab.

Click on the Referral tab. The Referral screen displays.

The screenshot shows the 'Customer Information' window with the 'Referral' tab selected. The window title is 'Customer Information' and the WDA is '28 - Gulf Coast WDA'. The 'Customer Search' section includes fields for SSN, Last, First, and TWIST ID. The 'Menu Selections' on the left includes 'Intake - Common', 'Eligibility', 'Program Detail', 'Child Care', 'Assessment', 'Service Tracking', 'Counselor Notes', 'Change SSN', 'TANF History', 'SNAP E&T History', 'Customer Calendar', 'Performance Data', and 'Common Measure'. The 'Referral' tab is active, showing a table with the following data:

Referral #	Provider Name	License Number	Type of Care	Referral Type	Summer Rate	Weekend Rate
[REDACTED]	Day Care Center 1240	[REDACTED]	1 - Regular Day Care	1 - Full	0	

Click on the printer icon at the top of the screen. Alternately click on File, and then click on Print Preview. The Print Selections screen displays.



Double click on the form name you wish to print.

- **Auth for Child Care Enrollment – Selected Provider – 2450:** Allows you to print the Authorization for Enrollment form for a single provider with all children listed with a referral to that provider.
- **Auth for Child Care Enrollment – Selected Referral – 2450:** Allows you to print the Authorization for Enrollment for only the referral selected.
- **Child Care Eligibility Certification report – 2050:** Allows you to print the application for financial aid for child care to use when a customer who is receiving financial aid recertifies. Note: Use this form or the Workforce Solutions Financial Aid Application, whichever is easier for the customer.

A preview of the form displays.

28 - Gulf Coast WDA Board Name **AUTHORIZATION FOR CHILD CARE ENROLLMENT** Form 2450

Date: 7/26/2012

TO: Day Care Center 1240
101 First Street
Best City, TX 77777

From: (Child Care Contractor)
Office Address and Telephone No.

PROVIDE DISCONTINUE UPDATE Childcare, according to the terms of our agreement, to the children of the family listed below:
 Licensed Relative Listed Home

Family Name: [REDACTED] Telephone No.: [REDACTED]
 Address (Street, City, State, ZIP): [REDACTED]

CHILD'S FULL NAME	DATE OF BIRTH	DAYS OF THE WEEK	CARE AUTHORIZED				TRANSPORTATION AUTHORIZED		REFERRAL	
			Variable	Full	Part	Blended	Yes	No	Start Date	End Date
[REDACTED]	[REDACTED]	NYYYYYN		X				X	07/26/2012	06/30/2013
[REDACTED]	[REDACTED]	NYYYYYN				X	X		07/26/2012	06/30/2013
[REDACTED]	[REDACTED]	NYYYYYN		X				X	07/26/2012	06/30/2013

REFERRAL TYPE: Full day - Six to twelve hours of care authorized.
 Part day - Less than six hours of care authorized.
 Blended - Before and after school care, holidays, and summer care authorized

Action Required:
 Collect Family Fee Amt. Reduce Family Fee Amt. Collect Other Child Care Subsidy

Parent Share of Cost

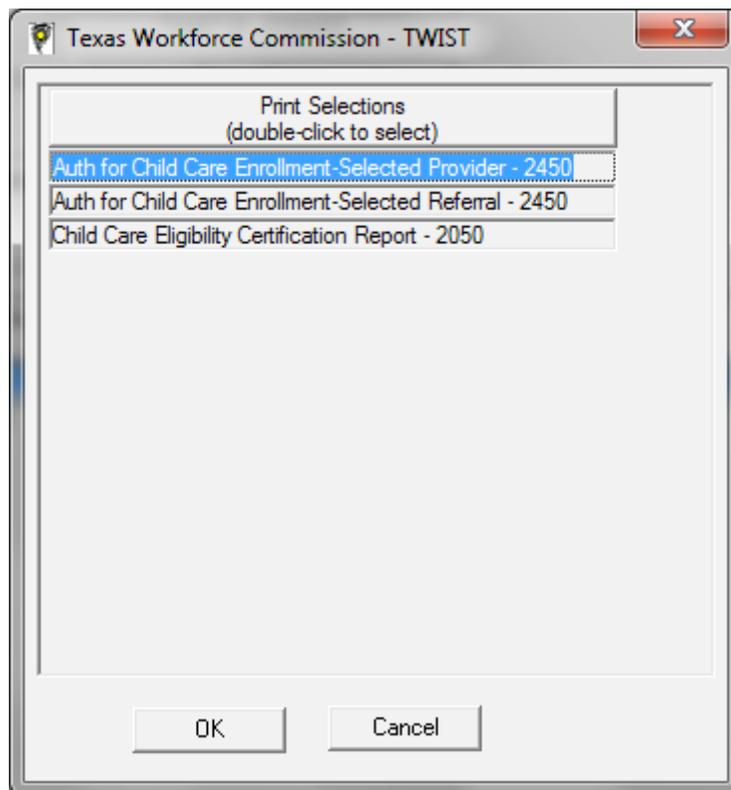
07/2012	08/2012	09/2012	10/2012	11/2012	12/2012	01/2013	02/2013	03/2013	04/2013	05/2013	06/2013
69	380	380	380	380	380	380	380	380	380	380	380

Subsidy Amount Subsidy Start Dt. Subsidy End Dt.
 \$.00 00/00/0000 00/00/0000

Comments: _____

This is a view of the Auth for Child Care Enrollment – Selected Provider -2450 selection.

- Review the form for accuracy.
- Send the document to MicroSoft OneNote to complete the form.
 1. From the Referral tab on the customer's record:
 - i. Click on the print icon at the top of the screen. The Print Selections pop-up displays.



- ii. Select 'Auth for Child Care Enrollment-Selected Provider -2450' by double-clicking on it.

The Form 2450 Print Preview screen displays.

28- Gulf Coast WDA
Board Name

Form 2450

Date: 10/9/2014

TO: Day Care Center 1240
101 First Street
Best City, TX 77777

From: (Child Care Contractor)

Office Address and Telephone No.

PROVIDE DISCONTINUE UPDATE Childcare, according to the terms of our agreement, to the children of the family listed below:

Licensed Relative Listed Home

Family Name: BELL, DONNA J Telephone No.: . . .

Address (Street, City, State, ZIP): 2341 CORTA APT 2216 AUSTIN, TX 24028

CHILD'S FULL NAME	DATE OF BIRTH	DAYS OF THE WEEK	CARE AUTHORIZED				TRANSPORTATION AUTHORIZED		REFERRAL		
			Variable	Full	Part	Blended	Yes	No	Start Date	End Date	
Bell, Kalya	08/24/2008	NYYYYN		X				X		10/09/2014	10/20/2014

Print Cancel Save As

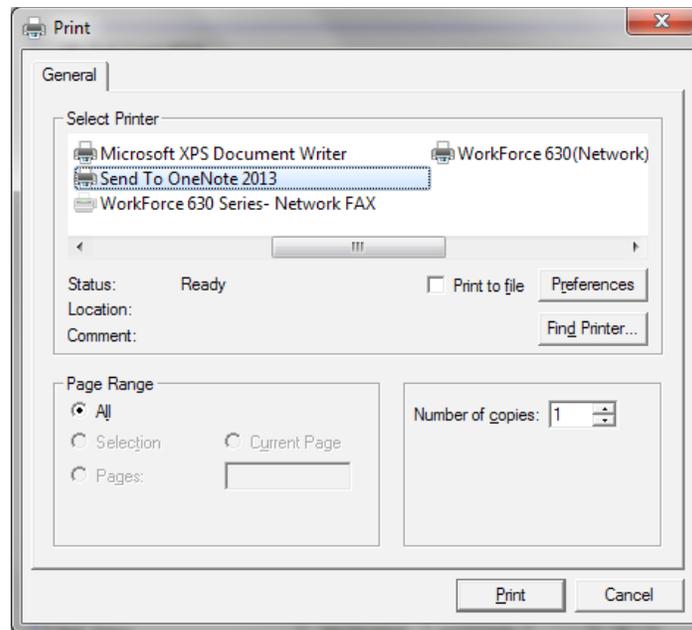
First Previous Next Last Zoom

2. Click the Print button at the bottom.

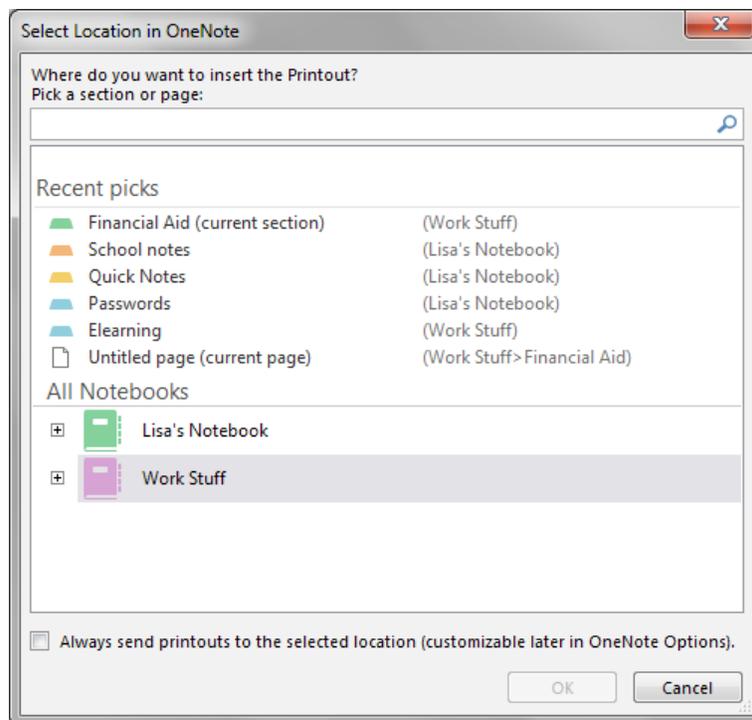
- Select the 'Send to OneNote' option.

Note: the version of OneNote will depend on the version of software on your computer.

- Click Print.

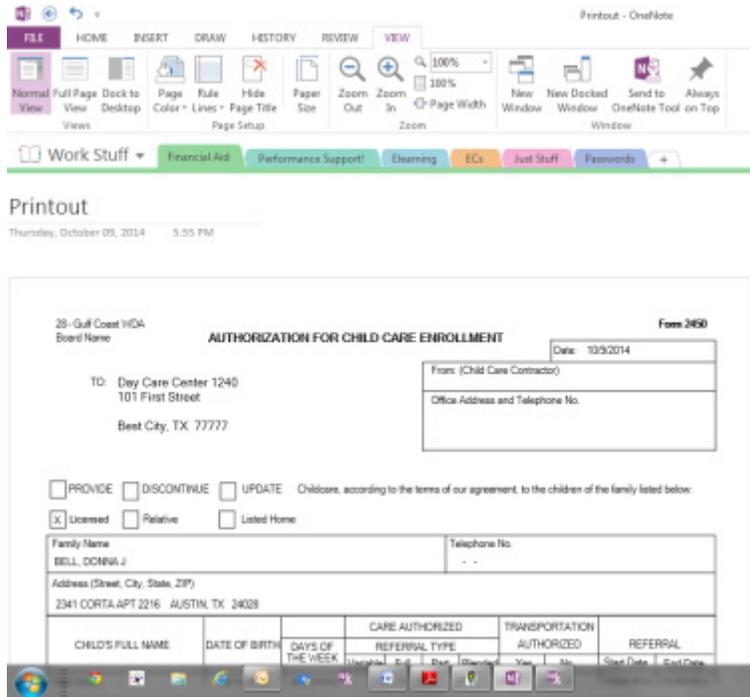


3. Modify Form 2450 in OneNote



4. OneNote prompts you to choose a location. Open the file by double-clicking on it.

5. Choose the View menu option.



6. Click on the Hide Page Title button.

7. Click in the 'From: (Child Care Contractor)' field to enter the FASC address and phone number

Workforce Solutions CSC
P.O. Box 924586
Houston, TX 77292

713/334-5980

The screenshot shows a web interface with a navigation bar containing tabs: Work Stuff, Financial Aid, Performance Support, Elearning, ECs, Just Stuff, and Passwords. Below the navigation bar is a form titled "28- Gulf Coast WDA Board Name" and "AUTHORIZATION FOR CHILD CARE ENROLLMENT" (Form 2450). The form includes a "Date" field with the value "10/9/2014". A "TO:" field contains "Day Care Center 1240, 101 First Street, Best City, TX 77777". A "From: (Child Care Contractor)" field contains "Workforce Solutions CSC, P.O. Box 924586, Houston, TX 77292 713/334-5980". Below these fields are checkboxes for "PROVIDE", "DISCONTINUE", and "UPDATE", followed by the text "Childcare, according to the terms of our agreement, to the children of the family listed below:". There are also checkboxes for "Licensed" (checked), "Relative", and "Listed Home". At the bottom, there are fields for "Family Name" (containing "BELL, DONNA J") and "Telephone No." (containing "-").

8. Scroll down to the Comments section. Insert the Authorization code and the name of the individual you spoke with to authorize care.

9. Print.

Note: The Authorization code is:

83(Last name, first name initials)(last two number of customer's SSN)
(Today's date ##/##/####)

Note: If you don't have the customer's SSN, use 00 instead.

Work Stuff Financial Aid Performance Support! Elearning ECs Just Stuff Passwords +

Part day - Less than six hours of care authorized.
Blended - Before and after school care, holidays, and summer care authorized

Action Required
 Collect Family Fee Amt. Reduce Family Fee Amt. Collect Other Child Care Subsidy

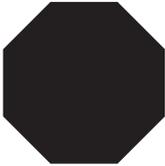
Parent Share of Cost

10/2014	11/2014	12/2014	01/2015	02/2015	03/2015	04/2015	05/2015	06/2015	07/2015	08/2015	09/2015
59	120	120	120	120	120	120	120	120	120	120	33

Subsidy

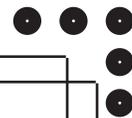
Comments: Authorization code: 83HR8710092014
 Spoke with: John Dough

- Send the form to the provider to start care.



STOP AND PRACTICE

Directions: Print the Child Care Authorization Referral form for Day Care Center 1 _ _ _ (last three digits of your user ID).



Counselor Notes

Notes and comments should paint a clear picture of what the customer wants and needs; and what the current status is. Any authorized person should be able to read a note and know what's going on with a customer or provider. Well-written notes are critical. They must be **C**lear and concise, **R**elevant, **I**nformative, and **T**imely. They must always **I**nclude next steps; and be **C**omplete, **A**ccurate, and **L**egal. This ensures your notes meet the **CRITICAL** standards established by Workforce Solutions.

Not all counselor notes and provider comments need to be written in narrative form. While most conversations with customers take the traditional narrative form, it is acceptable to use brief or bulleted statements when appropriate. In fact, you may find it is easier to use a combination of both to meet the **CRITICAL** standards. Use your professional judgment to determine a style that best suits the information you are conveying. Refer to Workforce Solutions Counselor Notes-Meeting the Critical Standards, in WS Issuance 13-03 located <http://www.wrksolutions.com/staff-resources/issuances/issuances-13/1303-unified-communication-twist-counselor-notes-guidelines> for more information on writing effective notes.

1. With the customer's record open, click on the Counselor Notes menu selection.
2. Right click in the gray area and select Add to add a line.

The Counselor Note screen displays.

3. Enter all relevant information.

Texas Workforce Commission TWIST ID: 5598422 -- BELL, DONNA

Note Group: 9 - Child Care License No.: TWIST ID: 5598422
 Provider:

Office 3: 2 - Test Office #2 W/DA 28 SDA 10 Creation Date: 10/09/2014
 Office 4: 2802 - Test Two Note Date: 10/09/2014
 Office 5: Progress:
 Staff: 2561 - 40 (240), trainee Reminder Date: 00/00/0000
 Subject: Referral change to Blended Unresolved Issue:

Description
 Donna called today to report that Kalya will be attendig grade school as of 10/23/2014 and will be attending day care part-time. She needs transportation from school to the day care provider.
 Start date: 10/23/2014
 End date: 09/08/2014
 Auth. code: 83HR8710092014
 Parent fee: September \$185 / October \$85
 Spoke with John Dough
 Mailed Parent Fee Adjustment Letter and 2450.

Data cannot be changed 10 calendar days after the creation date ()
 Except for Reminder Date and Unresolved Issue.

First Back Next Last New Note OK Cancel Delete Note

1 Of 1

Note Group: Enter the funding stream for which you are writing the note.

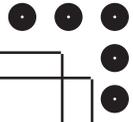
Office 3: Automatically populates with the contractor name.

Office 4: Automatically populates with the office name.

Staff: Automatically populates with the staff logged into TWIST.

Subject: Refer to the Subject Lines desk aid at <http://www.wrksolutions.com/staff-resources/issuances/issuances-13/1303-unified-communication-twist-counselor-notes-guidelines> for a list of approved subject lines. If there is not one defined, create one based on the reason for the note. For example; Referral change-full to blended.

Description: Create your note using the *Critical Guidelines* as a guide.



IMPORTANT NOTE:

Use the Subject Lines Desk Aid to find a subject line that accurately describes the topic of your counselor note. If you're not sure it's the appropriate subject line, read the description. Type it as is into the Subject Line field, and enter your note. If you can't find an appropriate subject line in the list, enter your own. Be sure it accurately describes the topic. **Do not use generic subject lines** that force the reader to open and read the note to determine the subject. For example: Discussion, Conference, Combo, Convo, Case Note, Counselor Note Update, COM SER, Office Visit, Other and Miscellaneous – are too generic and not helpful.

IMPORTANT NOTE:

The use of acronyms/abbreviations, such as "Convo" or "COM SER" seem useful because they're faster, they fit in the space available, and your immediate co-workers or people in your unit understand them; however, newer staff or staff from another part of the system may not. Use only standard abbreviations and approved abbreviations found in this desk aid.

IMPORTANT NOTE:

You cannot delete a note once it has been saved but you can change it for up to ten (10) days..

Updating the Customer Record

Once the customer's record has been created, update it, as needed.

- Record test scores
- Close the Program Detail
- Change type of child care referral
- Enter and update an Activity Interruption
- Show eligibility redetermination
- Change the parent's share of cost

Updating the WIOA Record

Record TABE Scores

TABE scores are used to report Educational Functioning Levels (EFL) for out-of-school youth under the Literacy and Numeracy Gains performance measure. The Board tracks and reports the number of out-of-school youth advancing one or more Educational Functioning Levels (EFLs) between the pre- and post-tests.

Out-of-school youth who remain deficient in basic skills and continue to receive services after one year will continue to count in the performance measure. Youth who are basic-skills deficient and continue to receive service the following year must be tested in each educational area in which the youth pre-tested as deficient – by the anniversary date of the first service -- to determine an EFL gain. The scores obtained from the post-test at the end of the first year are compared to the scores from the post-test administered at the end of the second year. Scores are compared in this manner for each year a youth remains basic-skills deficient and continues to receive WIOA Youth funded services (up to three years).

To enter TABE test scores in TWIST, from the customer's record, select the Assessment menu item. The Testing tab displays.

The screenshot displays the TWIST software interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Tools', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main window title is 'WDA: 28 - Gulf Coast WDA'. On the left side, there is a 'Customer Search' section with fields for 'SSN', 'Last', and 'First', and a 'TWIST ID' field. Below this is a 'Menu Selections' tree view with the following items: Intake - Common, Eligibility, Program Detail, WIA 07/C (selected), Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T History, Customer Calendar, Performance Date, and Common Measure. The main area of the window is divided into several tabs: 'Testing' (selected), 'Service Plan', 'Employability Status', 'Needs', and 'Barriers'. The 'Testing' tab contains a table with the following columns: 'DOL Reportable', 'EFL', 'Test Date', 'Pre/Post', 'Category', and 'Test'. The table is currently empty.

Right click, and select Add. The Test Detail screen displays.

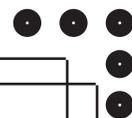
The screenshot shows a web application window titled "Texas Workforce Commission - TWIST". The main content area contains a form with the following fields and controls:

- DDL Reportable:
- EFL:
- Test Date:
- Pre/Post:
- Category:
- Test:
- Functional Area:
- TABE Form:
- Scale Score:
- Grade Level:
- Test Description:
- Test Type Description:

At the bottom of the form are two groups of buttons:

- Navigation: First, Back, Next, Last
- Actions: New, Delete, OK, Cancel

- Enter the Test Date.
- Select the appropriate Pre/Post category from the dropdown menu. Note: If you select options 3-Refused Testing or 6-Unable to Test, document the reason in Counselor Notes. Customers who refuse testing or who are unable to test are not excluded from the literacy and numeracy gains measurement.
- Select ABE from the Category dropdown menu.
- Select the appropriate test administered from the Test dropdown menu.
- Select the appropriate Functional Area.
- If you selected TABE 7-8, 9-10 from the Test dropdown menu, select the appropriate TABE Form. Otherwise, this field does not apply.
- Enter the Scale Score; not the grade equivalency level. The scale score is used to compute and derive all other scores, including grade levels.
- Skip the Grade Level, Test Description and Test Type Description fields.
- Click OK.



Save.

- Add the Service 68-Objective Assessment



STOP AND PRACTICE

Directions: Record Sophie's TABE score, _____,
on the Assessment tab.

Close the Program Detail

Select the Program Detail you wish to close from the menu selections. The Program Summary screen displays.

The screenshot shows a software window titled "Customer Information" with a dropdown menu set to "WDA: 28 - Gulf Coast WDA". On the left is a "Menu Selections" tree with "Program Detail" selected. The main area contains a "Customer" search section with fields for SSN, Last, First, and TWIST ID. Below this are tabs for various categories: Documentation, WIA Adult, WIA Disloc. Worker, WIA Youth, WIA YOG, WIA Other, Family, Income, Income Redetermination, Emp. Status, Disloc Worker, Disability/Medical, Exemptic, Program Summary (selected), Eligibility Summary, Characteristics, Certification, Education, Military, and Public As. The "Program Summary" section includes fields for Eligibility Determine Date (07/12/2012), Eligibility Expiration Date (8/25/2012), Application Date (07/01/2012), Assessed & Approved for Intensive Services (07/12/2012), Assessed & Approved for Training Services (07/12/2012), Out of School (checked), Age (25), Exit Date (00/00/0000), Exit Reason (dropdown), and Labor Force (dropdown). At the bottom, there are fields for Office 3 (2 - Test Office #2 WDA 28), Office 4 (2802 - Test Two), Office 5, Program Type (WIA), and Staff (2561 - 40 (240).trainee).

- Enter the Exit Date.
- Choose the Exit Reason from the dropdown.

- Choose the customer's employment status from the Labor Force dropdown.

The screenshot displays the 'Customer Information' window in a software application. The window title is 'Customer Information' and it shows a menu bar with 'File', 'Edit', 'View', 'Tools', 'Window', and 'Help'. The main area is divided into several sections:

- Customer Search:** Includes fields for SSN, Last, First, and TWIST ID, along with 'Advanced' and 'Search' buttons.
- Customer Information:** Fields for SSN, Name, Birth Date, Phone, Ext., and TWIST ID.
- Documentation:** A set of tabs including 'WIA Adult', 'WIA Disloc. Worker', 'WIA Youth', 'WIA YOG', and 'WIA Other'.
- Program Summary:** The active tab, showing various dates and application details. A red box highlights the 'Labor Force' dropdown menu, which is currently set to '1 - Employed'. Other dropdowns in this section include 'Exit Reason' (set to '77 - Entered employment') and 'Exit Date' (set to '07/30/2012').
- Menu Selections:** A tree view on the left with options like 'Intake - Common', 'Eligibility', 'Program Detail', 'Assessment', 'Service Tracking', 'Counselor Notes', 'Change SSN', 'TANF History', 'SNAP E&T History', 'Customer Calendars', 'Performance Data', and 'Common Measures'.
- Office and Program Information:** Fields for Office 3, 4, and 5, and Program Type (set to 'WIA').

Save.

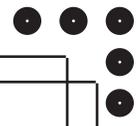
Updating the Child Care Record

In addition to processing a customer's initial eligibility and authorizing financial aid for child care, you may also:

- Change referral information
- Adjust the parent's share of cost
- Adjust attendance in CCAA,
- Re-determine/recertify eligibility, and
- Discontinue financial aid for child care.

When a customer's child care needs require a change which does not affect the eligibility or the eligibility period only a change to the referral is required. Such as a:

- Change in the type of care
- Change to the days needed
- Transfer to another provider
- Change to the referral end dates
- Customer requests a suspension of care
- Customer has a permanent loss of work or school/training ends



No Change in Eligibility Criteria

Any time the customer has a change in child care needs which has no effect on eligibility, close the current referral and create a new one with the necessary changes. Use the standard actions below to modify a record when there is no change to the eligibility criteria:

1. Create a new referral with the changes to the record
2. Close the original referral
3. Verify and update as needed the Parent Share of Cost
4. Print Form 2450
5. Notify the customer and provider of the changes
6. Enter a Counselor Note documenting your actions

Change to Blended Care: Blended care is a combination of full and part-time care depending on whether or not school is in session. When a child begins attending school, change the required hours of care from full-time to blended. This allows the provider to bill for the correct number of hours. If the change isn't made, providers might continue to bill for full-time care when they have only provided part-time care. Make sure the customer understands the difference in the types of care, and that you have the correct date for blended care to begin.

Suspend Child Care: Under certain circumstances, financial aid can be suspended for a limited period of time when a customer has interruptions in work, training, or education. If the customer returns to school or work within the time allowed, she doesn't have to reapply for financial aid or be placed on a wait list. However, the provider is not required to hold a place for the child. Encourage your customer to talk with the provider about the child's return.

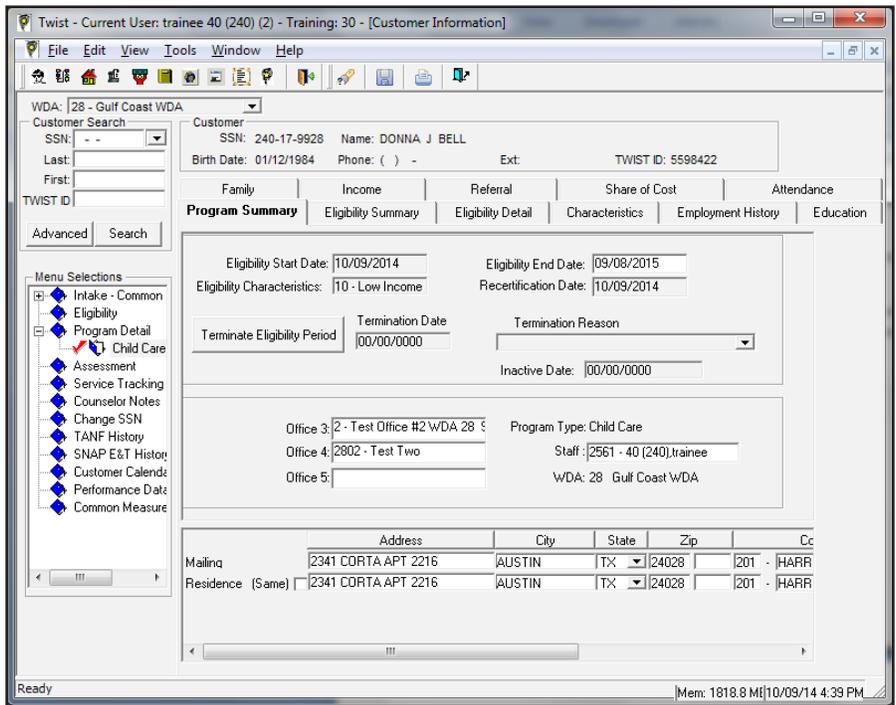
1. Create a New Referral

With the customer's record in focus:

- a. Open the current child care Program Detail:
 - Click on the plus sign to the left of the Program Detail menu selection.
 - Double click on the current child care Program Detail, indicated by a red check mark.

The child care Program Detail displays with the Program Summary screen in front.

- b. Click on the Referral tab.



The Referral screen displays.

- c. Choose the child whose referral you need to change from the Child dropdown menu.
- d. Right click on the current referral and choose "Duplicate Referral."

WDA: 28 - Gulf Coast WDA

Customer Search: SSN: --, Last: --, First: --, TWIST ID: --, Advanced Search

Customer: SSN: 240-17-9928, Name: DONNA J BELL, Birth Date: 01/12/1984, Phone: () -, Ext: --, TWIST ID: 5598422

Program Summary | Eligibility Summary | Eligibility Detail | Characteristics | Employment History | Education
Family | Income | **Referral** | Share of Cost | Attendance

Child: Bell, Kalya | Authorized Parent Share of Cost Required

Referral #	Provider Name	License Number	Type of Care	Referral Type
11201	Day Care Center 1240	312800240	1 - Regular Day Care	1 - Full

Menu Selections: Intake - Common, Eligibility, Program Detail, Child Care, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP EST History, Customer Calendars, Performance Data, Common Measure

Ready | Mem: 1818.5 M | 10/09/14 4:42 PM

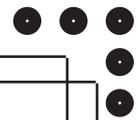
The Referral Detail screen displays.

The screenshot shows a window titled "Referral Detail" with a close button in the top right corner. Below the title bar, there is a prompt: "Press Enter to search by Provider Name or License Number". The form is organized into several sections:

- Child:** Bell, Kalya
- Provider Name:** Day Care Center 1240
- License Number:** 312800240 (with a "Search" button)
- Type of Care:** 1 - Regular Day Care (dropdown menu)
- Referral Type:** 1 - Full (dropdown menu)
- Summer Rate:** (dropdown menu)
- Weekend Rate:** (dropdown menu)
- Start Date:** 00/00/0000
- End Date:** 00/00/0000
- Transportation Required:** 2 - No (dropdown menu)
- Inclusion Rate:** %
- Variable Schedule:** Days: (text field)
- Expected Return Date:** 00/00/0000
- End Reason:** (dropdown menu)
- Inactive Date:** 00/00/0000
- Days Of the Week:** Sunday , Monday , Tuesday , Wednesday , Thursday , Friday , Saturday
- Office/Staff Assignment (optional):** Office 3: 2 - Test Office #2 WD, Office 4: 2802 - Test Two, Office 5: (dropdown menu), Staff: 2561 - 40 (240), trainee (dropdown menu)
- Fix Reason:** (dropdown menu)

At the bottom of the window, there are "OK" and "Cancel" buttons.

- e. Complete or change the field(s) as needed.
- f. Click OK, but DON'T SAVE.



2. Close the Original Referral

- a. From the child's referral screen, open the current referral by double clicking on it.
- b. Change the End Date to the day before the new referral begins. For example if the new referral begins on October 23, 2016, enter an End Date of October 22, 2016 for the current referral.
- c. Click OK.
- d. Save your changes.

3. Verify the Parent Share of Cost

Working customers receiving financial aid for child care must pay a share of the cost of child care to the provider. The parent's share of cost is based on income and is assessed on a sliding scale. The parent works with the provider to determine when and how the share of cost will be collected. If the fee is not paid, the provider may choose to stop care. Share of cost is for both regulated and unregulated providers.

- Customers qualify for a 40% reduction in the parent share of cost if *the family size is greater than six*. Use the *Discount to Parent Share of Cost Worksheet* to determine the parent share of cost.
- Occasionally a customer may have a crisis and request a temporary reduction in his/her share of cost. Consult with your supervisor if you feel the request is warranted. Document any changes to the share of cost in Counselor Notes.
- The share of cost rate schedule is available in TWIST > WDA Administration > Child Care Administration > Share of Cost.
- Parent's share of cost can not be raised above the amount determined at initial eligibility unless a child is added to the customer's record.

Workforce Solutions Financial Aid

- a. Click on the Share of Cost tab. The Parent Share of Cost screen displays.

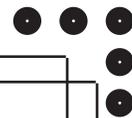
The screenshot shows the 'Parent Share of Cost' screen in the Workforce Solutions Financial Aid software. The window title is 'Twist - Current User: trainee 40 (240) (2) - Training: 30 - [Customer Information]'. The interface includes a menu bar (File, Edit, View, Tools, Window, Help), a toolbar, and a navigation pane on the left with 'Menu Selections' such as Intake - Common, Eligibility, Program Detail, Child Care, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T Histor, Customer Calends, Performance Data, and Common Measure.

The main content area displays customer information for DONNA J BELL (SSN: 240-17-9928, Birth Date: 01/12/1984, TWIST ID: 5598422). Below this, there are tabs for Program Summary, Eligibility Summary, Eligibility Detail, Characteristics, and Employment History. The 'Share of Cost' tab is selected, showing a table of 'Copy System Calculations'.

		System	Authorized	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr
		\$59	\$120	\$120	\$120	\$120	\$120	\$120	\$120	\$120
		\$59	\$120	\$120	\$120	\$120	\$120	\$120	\$120	\$120
Provider Name	WDA	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr		
System	Day Care Center 1240 - 31280C	28 - Gulf Coast WDA	\$59	\$120	\$120	\$120	\$120	\$120	\$120	\$120
Authorized	Day Care Center 1240 - 31280C	28 - Gulf Coast WDA	\$9,000.00	\$120	\$120	\$120	\$120	\$120	\$120	\$120

Below the table is a 'Subsidy' section with columns for Provider, Subsidy Amount, Start Date, and End Date.

- b. Verify the parent fee on the "Authorized" line is correct.
- c. Save your changes.



4. Print Form 2450

When a change is made to the child care requirements, the provider must be notified in writing using an Authorization for Child Care Enrollment Form (2450). Print this form from the Referral tab in TWIST *after* you update the customer's Share of Cost.

Refer to page 2-110 for instructions to print and make changes to form 2450.

5. Notify the Customer and Provider of the Changes

Workforce Solutions provides a number of letters and forms to notify customers of changes to their child care. These letters are located on the Workforce Solutions website at: <http://www.wrksolutions.com/staff-resources/services-we-offer/financial-aid-services#Issuances-Letters> .

- d. In this example, complete and print the Parent Fee Adjustment Letter.
- e. Mail the completed Form 2450 to the provider.
- f. Mail the customer the appropriate letter.

Change in Eligibility Criteria

A change in a customer's eligibility criteria, such as number of children needing care, requires changes be made to the TWIST Intake Common record and a new Program Detail created.

Use the standard actions below to update a record when there is a change in the eligibility criteria:

1. Modify eligibility criteria in the Intake Common
2. Close the existing Program Detail with the appropriate termination reason
3. Open a new Program Detail
4. Create a new referral,
5. Verify the Parent Share of Cost,
6. Print Form 2450,
7. Send a new 2450 to the provider,
8. Notify the customer of the changes using the appropriate letter,
9. Enter a Counselor Note documenting your actions.

Module 2: Creating and Updating the Customer Record

1. Modify eligibility criteria in the Intake Common.
 - a. Make changes to the customer's income. From the Intake-Common screen click on the Income tab. Click on the parent's name. The Income Detail screen displays.

WDA: 28 - Gulf Coast WDA

Customer Search: SSN: -- -- Last: First: TWIST ID: Advanced Search

Customer: SSN: 240-17-9928 Name: DONNA J BELL Birth Date: 01/12/1984 Phone: () - Ext: TWIST ID: 5598422

Enhanced Service Specialized Service

Identity Contacts Characteristics Education Military Employment History Public Assistance

Card Holder

Family **Income** Employment Status Dislocated Worker Disability/Medical Optional Questions

Income Determination Period: Beginning: Ending: 00/00/0000

Family Member	Included 6 Month (W/A Definition)	Excluded 6 Month (W/A Definition)	Total 6 Months	Total Child Care Included (Month)
Kalya Bell				.00
Katie Bell				.00
DONNA J BELL				1,500.00
	.00	.00	.00	1,500.00
			Ongoing Medical Expense:	.00
			Monthly Total (Less Medical Expense):	1,500.00
			x 2	
Annualized Total:	.00		x 12	18,000.00

- b. Make changes to the customer's income..

Delete	Relationship	SSN	Family Member(First, Middle Initial, Last Name)		Birth Date	Age
<input type="checkbox"/>	3 - Child	- -	Kalya	Bell	08/24/2008	6
<input type="checkbox"/>	3 - Child	- -	Katie	Bell	07/23/2011	3
<input type="checkbox"/>	1 - Self	240-17-9928	DONNA	J BELL	01/12/1984	30

Income Type	W/A Prior 6 Mo. Amt	Child Care Current Monthly Amount	Comments	W/A Included	Child Care Included	T/A Inct
1 Gross Wages/Salaries	.00	1,500.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
2 Self Employment Income	.00	.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3 Reg Payments SS Act	.00	.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
4 Reg W/km Compensation	.00	.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
5 Comp. & Dis Payments	.00	.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
6 Interest/Dividends	.00	.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
7 Railroad Retirement	.00	.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
8 Other Pension	.00	.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
9 Other Included Incom	.00	.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
10 Non-Cash Income	.00	.00		<input type="checkbox"/>	<input type="checkbox"/>	
11 Child Support	.00	.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
12 Public Assistance	.00	.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
13 Unemployment Benefit	.00	.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	

OK Cancel

- c. Click OK.

d. Save.

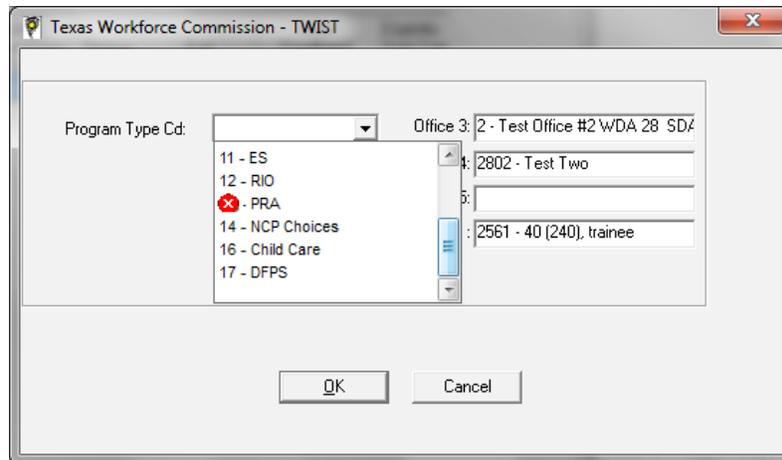
Make additional changes to the customer's Intake Common as needed.

2. Close the Existing Program Detail with the Appropriate Termination Reason
 - a. Click on the plus sign to the left of the Program Detail menu option.
 - b. Click on the current open Child Care Program Detail, indicated by a red check mark. The Program Summary screen displays.

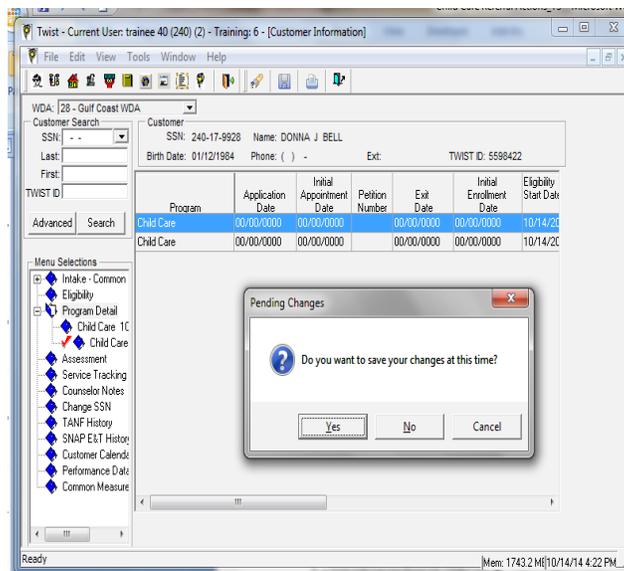
The screenshot shows a software window titled "Twist - Current User: trainee 40 (240) (2) - Training: 6 - [Customer Information]". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar. On the left, there is a "Menu Selections" tree with options like Intake - Common, Eligibility, Program Detail, Child Care, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T Histor, Customer Calende, Performance Date, and Common Measure. The "Child Care" option is checked with a red checkmark. The main area displays the "Program Summary" for a customer named DONNA J BELL, SSN: 240-17-9928, Birth Date: 01/12/1984, and TWIST ID: 5598422. The "Eligibility Start Date" is 10/14/2014 and the "Eligibility End Date" is 09/14/2015. The "Termination Date" is 10/14/2014 and the "Termination Reason" is "118 - No longer working, training, or in school". The "Program Type" is "Child Care". The address is 2341 CORTA APT 2216, AUSTIN, TX 78702. The status is "Ready" and the memory usage is "Mem: 1738.4 M".

- c. Click the Terminate Eligibility Period button. The Termination Reason dropdown displays.
- d. Enter the Termination Date: Date child care ends.
- e. Select the Termination Reason from the dropdown: Choose the appropriate reason. In this example choose 118-No longer working, training, or in school.
- f. Save your changes.

3. Open a New Program Detail
 - a. Click Program Detail from the menu selection. The Program Detail screen displays.
 - b. Right click to add a line. The Program Type screen displays.

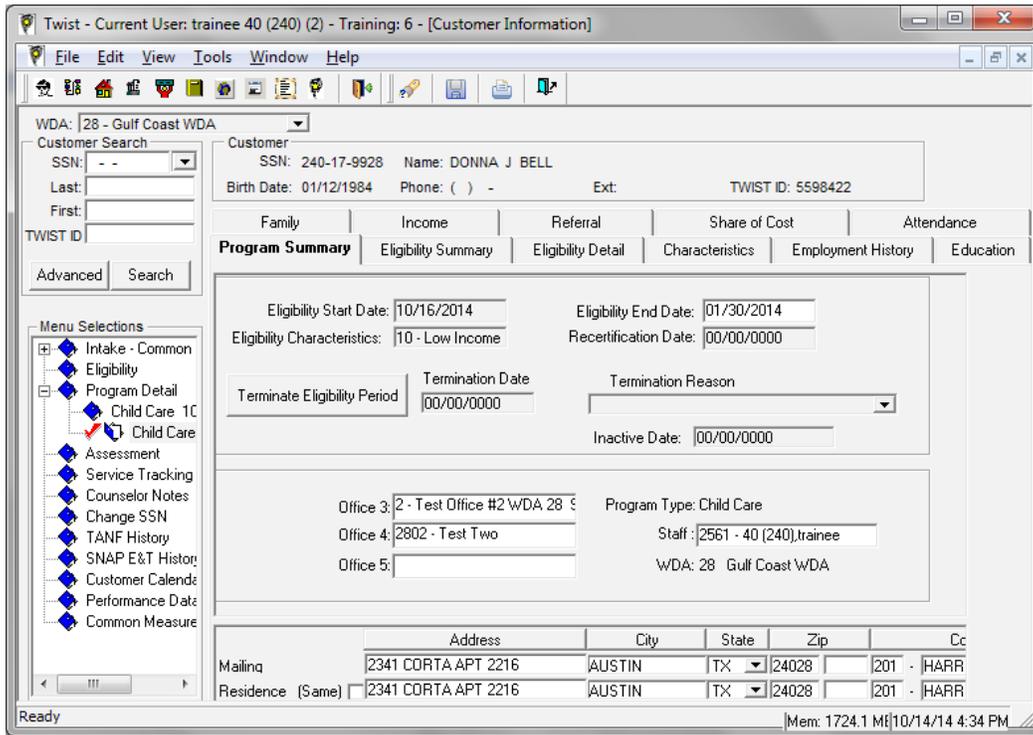


- c. Select Program Type 16-Child Care.
- d. Click OK
- e. Click on the new Program Detail, indicated by a red check mark. The Pending Changes pop-up displays. Click "No".



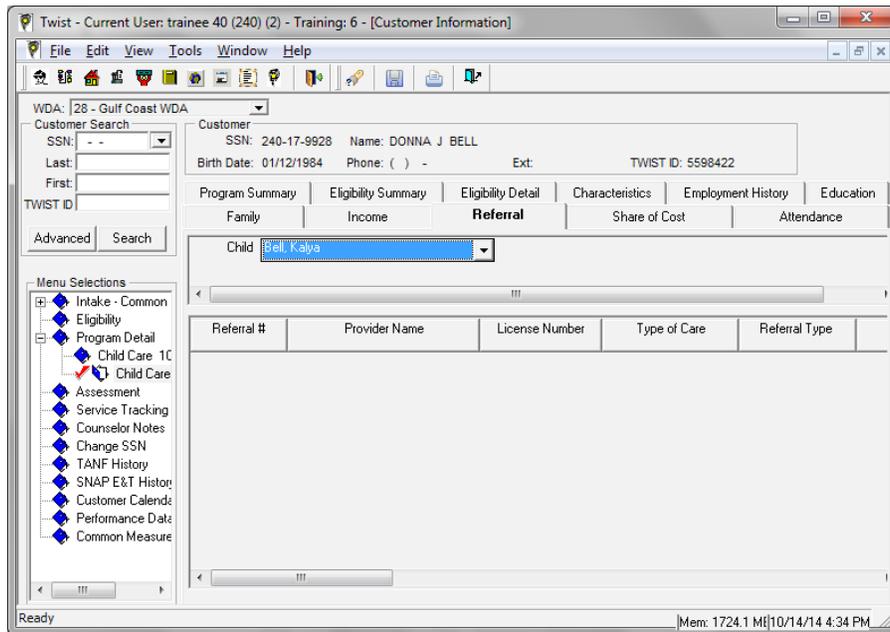
The Program Summary screen displays.

- f. Enter the Eligibility Start Date: the day the medical leave begins. This should be the day after the date entered as the Termination Date for the previous Program Detail.
- g. Enter the Eligibility End Date: Enter up to 90 days from the start date. This should correspond with the doctor's note.



4. Create New Referral(s)

- a. Click on the Referral tab. The Referral screen displays.



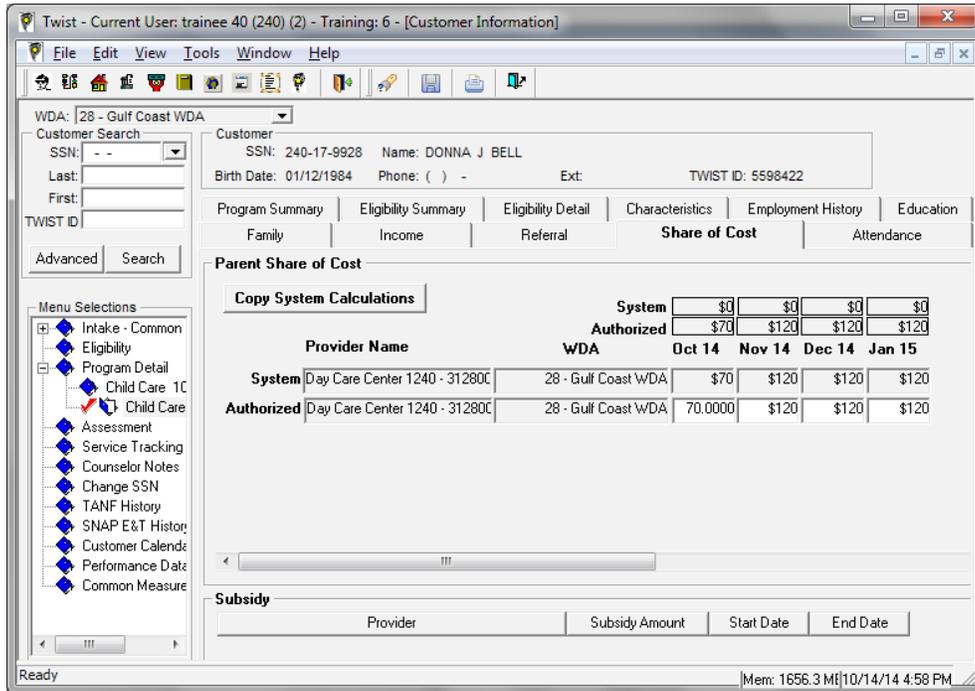
- b. Choose the child for whom you are creating a referral from the dropdown menu on the top left.
- c. Right click and click Add to add a new referral. The Referral Detail screen displays.

- d. Complete the Referral Detail information

Repeat for all children needing child care.

5. Verify the Parent Share of Cost

- a. Click on the Share of Cost tab. The Parent Share of Cost screen displays.

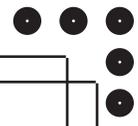


- b. Delete amounts on the Authorized line.
- c. Manually enter the System Calculations from the top Systems boxes into the Authorized amount boxes.
- d. Save your changes

6. Print Form 2450 (see above)

7. Notify the customer and provider of the changes (see above)

8. Enter a Counselor Note documenting your actions (see above)



Change in the Parent Share of Cost

A parent's share of cost may be reduced during the 12-month eligibility period but may not be raised above the originally assessed amount, unless a child who needs care is added to the family.

- Change in number of children in care:
 - Refer to the Parent Share of Cost screen under WDA administration to estimate the new cost to the family.
 - Give/send *Notice of Parent Fee* letter to customer, and new 2450 to the provider.
- Eligible for discount: Families with seven or more family members are eligible for a discount in parent fees. Use the Discount to Parent Share of Cost spreadsheet to calculate the adjusted payment. Give/send *Notice of Parent Fee* letter to customer, and new 2450 to the provider.
- Reduction requests: If the customer requests a temporary reduction in fees, she must be referred to your organization's contact person responsible for reviewing, authorizing/denying the request.
- Customer type changes to a type that does or does not require a parent fee. This requires a change in the Referral Type on the Intake-Common, a new Program Detail, and new referrals. This is covered earlier in this module.

Transportation and Inclusion Rate can be updated on the Referral tab at any time. All other fields are editable up to seven days after the Start Date. Any time you make changes to the Referral, print a new Child Care Authorization form and send it to the provider to notify them of the changes.

Transfers

Workforce Solutions will change child care providers at the customer’s request. Instruct customers requesting a transfer to contact the FAPO to handle the transfer.

After the seven day window to make changes to the referral:

1. Close the current referral.
 - From the Program Detail Referral tab, choose the child whose referral needs updating from the dropdown list.
 - Double click on the referral you wish to close. The Referral Detail screen displays.

The screenshot shows a 'Referral Detail' window with the following fields and values:

- Child:** [Redacted]
- Provider Name:** Day Care Center 1240
- License Number:** [Redacted] **Search**
- Type of Care:** 1 - Regular Day Care
- Referral Type:** 3 - Blended
- Summer Rate:** 1 - Full
- Weekend Rate:** [Empty]
- Start Date:** 07/12/2012
- End Date:** 06/30/2013
- Transportation Required:** 1 - Yes
- Inclusion Rate:** [Empty] %
- Variable Schedule:** [Empty] Days: [Empty]
- Expected Return Date:** 00/00/0000
- End Reason:** [Empty]
- Inactive Date:** 00/00/0000
- Days Of the Week:** Sunday [], Monday [x], Tuesday [x], Wednesday [x], Thursday [x], Friday [x], Saturday []
- Office/Staff Assignment(optional):**
 - Office 3: 2 - Test Office #2 W/D
 - Office 4: 2802 - Test Two
 - Office 5: [Empty]
 - Staff: 2561 - 40 (240), trainee
- Fix Reason:** [Empty]

Buttons: OK, Cancel

- **End Date:** Enter the day the referral should end, or the last day of care.
- **Expected Return Date:** If this is a suspension of care, enter the date the child is expected to return to care after the suspension.
- **End Reason** – Enter if care is ending, or expected to end because of:
 - **Suspension:** Enter if you are closing the referral, or planning to close the referral due to a suspension. Note: this reason can be entered when the referral is created, if there is a planned suspension in care.
 - **Inactive (Error)**
 - **Excessive Absences**
- Click **OK**.
- **Save**.

IMPORTANT NOTE:

If the change requires all referrals on the Program Detail to be closed, do not terminate the eligibility period to do so. Close each referral manually.

2. Create a new referral, with the necessary changes. Do not create a new referral for a suspension until the customer returns.
3. Update the Parent Share of Cost, as needed.
4. Print the Child Care Authorization form.
5. Notify the provider.
6. Enter a Counselor Note to document the change.

Adjusting Attendance

Customers who receive financial aid for child care must ensure their children attend child care regularly. Children who accumulate sixty-five (65) or more absences in an eligibility period do not qualify to receive financial aid for child care for the following 12-month period. Absences due to a child's documented chronic illness or disability, or court-ordered visitation are not counted in the sixty-five day limit and should be adjusted accordingly. The service year starts the date the child begins receiving financial aid for child care and renews on the anniversary date. Letters are sent to the parent when a child's absences reach fifteen, thirty, and forty-six, reminding them the child will not be eligible at re-determination if the child accumulates 65 absences.

- **TANF/Choices.** Customers tagged TANF/Choices must be authorized for financial aid for child care during a sanction period to allow the customer to demonstrate cooperation.
- **Child Protective Services.** Customers with child care financial aid paid with Child Protective Services will not lose financial aid for as long as child care is authorized and funded by the Department of Family and Protective Services. the FASC will not send letters to these customers.

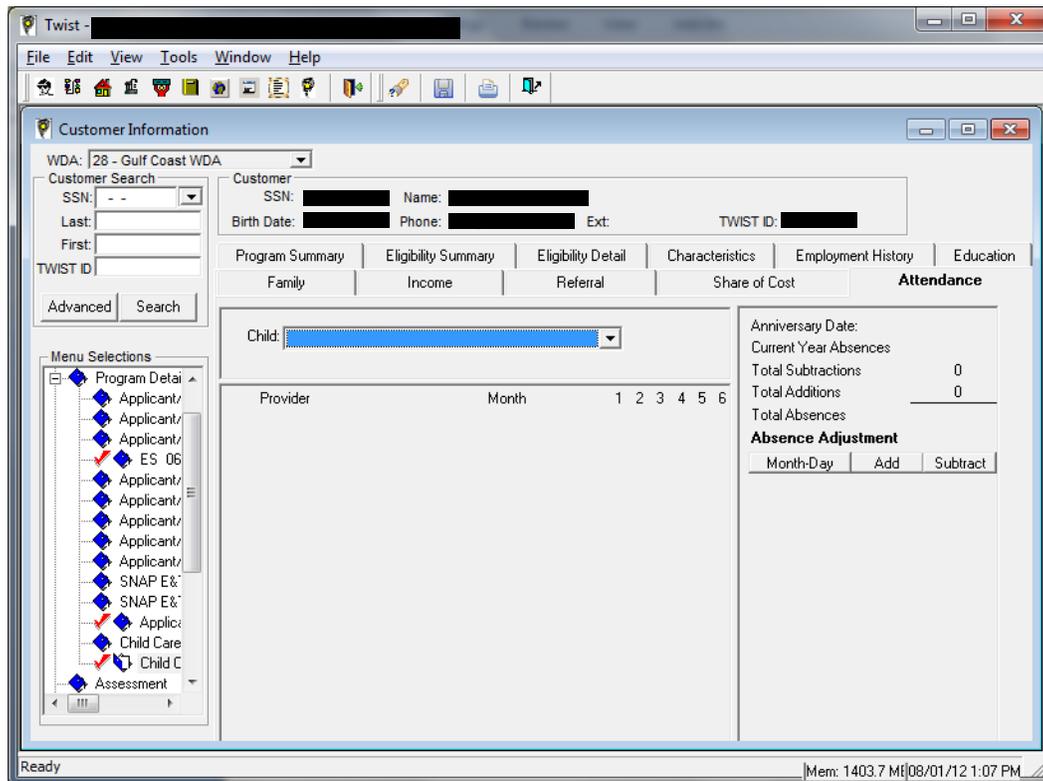
Letters instruct the customer to contact a specified career office or FASC for answers to questions.

Staff makes all decisions to adjust customers' absences. Document the decision and any adjustments to absences in TWIST counselor notes and send an issue through the FACS system to notify FAPO of the attendance adjustment. The parent must provide documentation supporting:

- **Illness** - temporary extended illness or a child's chronic medical condition or
- **Extenuating circumstance** - Issues beyond the parent's control that necessitated absences, such as a death in the family or transportation issues (car repair etc.).

To adjust attendance:

- From the customer's Child Care Program Detail, click on the Attendance tab. The Attendance screen displays.



Select the child whose attendance needs adjusting from the dropdown menu. The Attendance Detail screen displays.

Workforce Solutions Financial Aid

The screenshot displays a software window with a menu on the left and a main data area on the right. The menu includes 'Program Detail', 'Applicant/ ES 06', 'Applicant/ SNAP E&', 'Applicant/ Child Care', and 'Assessment'. The main area has tabs for 'Program Summary', 'Eligibility Summary', 'Eligibility Detail', 'Characteristics', 'Employment History', and 'Education'. Under 'Eligibility Detail', there are sub-tabs for 'Family', 'Income', 'Referral', 'Share of Cost', and 'Attendance'. The 'Attendance' tab is active, showing a table with columns for 'Provider', 'Month', and days of the week (1-6). The data row shows 'Eternity Christian Childcare' for 'Jul 2012' with 'P' in each day column. To the right of the table are fields for 'Anniversary Date', 'Current Year Absences', 'Total Subtractions', 'Total Additions', and 'Total Absences', all showing '0'. Below these is an 'Absence Adjustment' table with columns for 'Month-Day', 'Add', and 'Subtract', with '08-01' entered in the first column.

Provider	Month	1	2	3	4	5	6
Eternity Christian Childcare	Jul 2012	P	P	P	P	P	P

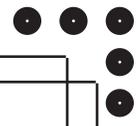
Month-Day	Add	Subtract
08-01		

The left side of the screen shows a Read-Only view of the child's attendance. The right side of the screen displays Service Year and Absence details.

Enter the Absence Adjustment in the appropriate field to Add or Subtract Absences.

Save.

Go to the Counselor Notes menu selection to add a note explaining the adjustment.



Re-determine Eligibility

Changes that require you to re-determine eligibility and recertify the need for financial aid for child care include:

- The eligibility period is expiring

Use the following guidelines to conduct a redetermination/recertification:

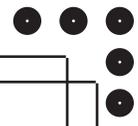
- Do a quick eligibility review to confirm customer will continue to qualify.
- Use the redetermination application application.
- Complete the Documents checklist to indicate the documents needed.

When the customer returns the required documentation:

- Review the information on the Intake Common, including Characteristics, Education, Employment History, Family, and Income, if applicable. Make changes as necessary.
- Confirm Eligibility.
- Close the current Program Detail (see instructions below).
- Create a new Program Detail, specifying the new period of eligibility. Verify the start and end dates before saving.

Workforce Solutions Financial Aid

- Create a new Referral for each child needing care.
- Print the Authorization for Child Care Enrollment (2450).
- Notify the FAPO, or process and mail Form 2450 to the provider with the new eligibility start and eligibility end dates. If the provider won't get the new authorization for before the original end date, contact the provider by telephone with the new authorization dates. If you are unable to reach the provider, notify the FAPO to contact the provider immediately. In this case, do not use an authorization code. The FAPO will enter the authorization code.
- Write a counselor note documenting the changes and the authorization code.



Discontinue Child Care

Stop financial aid for child care and notify the provider to end child care services when:

- The family income exceeds 85% of the State Median Income (SMI). Refer to the Workforce Solutions Income Guidelines, Child Care chart, Sustaining Income column. .
- The parent asks to end care.

To discontinue child care financial aid for the reasons listed above, you must send a *Denying Financial Aid* letter. This letter:

- Tells the customer why we are denying or discontinuing financial aid;
- Provides the customer with the steps necessary to appeal our decision; and
- Includes the appeal form appropriate to that customer's situation.

The letter has a space for you to indicate the reason for discontinuing care. Choose the reason from the *Reasons to Deny* chart; then copy and paste it into the letter. The reason also informs the customer if she has 15 additional days of financial aid to make other arrangements for child care. You must include the appropriate *Notice of Right to Appeal* with the letter. There are two appeals forms. Refer to the *Reasons to Deny* chart for the appropriate form. Notify the provider of the new end date with the updated 2450.

The FAPO is responsible for stopping financial aid for child care under the following circumstances:

- Provider will no longer care for the child(ren)
- Changes in law or funding outside of the parent's control

The FAPO sends the *Denying Financial Aid* letter and processes the changes and discontinuations.

IMPORTANT NOTE:

Failure to complete the step notifying the provider to end child care services can result in disallowed costs. If you discontinue financial aid for child care in TWIST but fail to notify the provider to discontinue care, the provider may continue to provide child care for which she will bill.

Terminate the eligibility period when the family is no longer eligible to receive child care services. This action ends all referrals within the Program Detail as of the termination date. The termination date must be prior to or on the eligibility end date and cannot be prior to seven days of the system date. Terminating the eligibility period terminates all open referrals. Terminate the eligibility period and all referrals on a Program Detail from the Program Summary tab.

Open the Program Detail. The Program Summary screen displays.

The screenshot shows a software window titled "Customer Information" with a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar. The window is divided into several sections:

- Customer Search:** Includes fields for SSN, Last, First, and TWIST ID, along with "Advanced" and "Search" buttons.
- Customer Information:** Displays fields for SSN, Name, Birth Date, Phone, Ext., and TWIST ID.
- Program Summary:** The active tab, showing:
 - Eligibility Start Date: 07/12/2012
 - Eligibility End Date: 07/10/2013
 - Eligibility Characteristics: 10 - Low Income
 - Recertification Date: 07/12/2013
 - Buttons: "Terminate Eligibility Period", "Termination Date" (00/00/0000), and "Termination Reason" (dropdown).
 - Office information: Office 3 (2 - Test Office #2 WDA 28), Office 4 (2802 - Test Two), Office 5 (empty).
 - Program Type: Child Care
 - Staff: 2561 - 40 (240), trainee
 - WDA: 28 - Gulf Coast WDA
- Menu Selections:** A tree view on the left with options like Intake - Common, Eligibility, Program Detail (selected), Child Care, Assessment, Service Tracking, Counselor Notes, Change SSN, TANF History, SNAP E&T History, Customer Calendars, Performance Data, and Common Measure.
- Address Table:**

	Address	City	State	Zip	County
Mailing	[Redacted]	AUSTIN	TX	24028	201 - HARRIS
Residence (Same)	[Redacted]	AUSTIN	TX	24028	201 - HARRIS

The status bar at the bottom indicates "Ready" and "Mem: 1572.8 Mb | 08/02/12 4:00 PM".

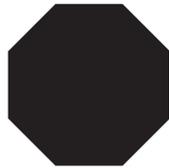
Click on the Terminate Eligibility Period button. The Termination Date and Termination Reason fields open.

Enter the Termination Date. Choose the Termination Reason from the dropdown menu.

The screenshot shows the 'Customer Information' window in the Workforce Solutions Financial Aid software. The window is titled 'Customer Information' and has a menu bar with 'File', 'Edit', 'View', 'Tools', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main area of the window is divided into several sections:

- Customer Search:** Fields for SSN (with a dropdown), Last, First, and TWIST ID. There are 'Advanced' and 'Search' buttons.
- Customer Information:** Fields for SSN, Name, Birth Date, Phone, Ext., and TWIST ID.
- Eligibility Summary:** A tabbed interface with tabs for 'Family', 'Income', 'Referral', 'Share of Cost', and 'Attendance'. The 'Program Summary' tab is active, showing 'Eligibility Start Date: 07/12/2012', 'Eligibility End Date: 07/10/2013', 'Eligibility Characteristics: 10 - Low Income', and 'Recertification Date: 07/12/2013'.
- Termination Information:** Fields for 'Terminate Eligibility Period' (08/02/2012), 'Termination Date' (08/02/2012), and 'Termination Reason' (138 - No longer eligible due to income: 150%).
- Office Information:** Fields for 'Office 3' (2 - Test Office #2 WDA 28), 'Office 4' (2802 - Test Two), 'Office 5', 'Program Type' (Child Care), and 'Staff' (2561 - 40 (240), trainee).
- Address:** Fields for 'Mailing' and 'Residence (Same)' with columns for Address, City, State, Zip, and Cc.

The status bar at the bottom of the window shows 'Ready' and 'Mem: 1584.8 M [08/02/12 4:02 PM]'.



STOP AND PRACTICE

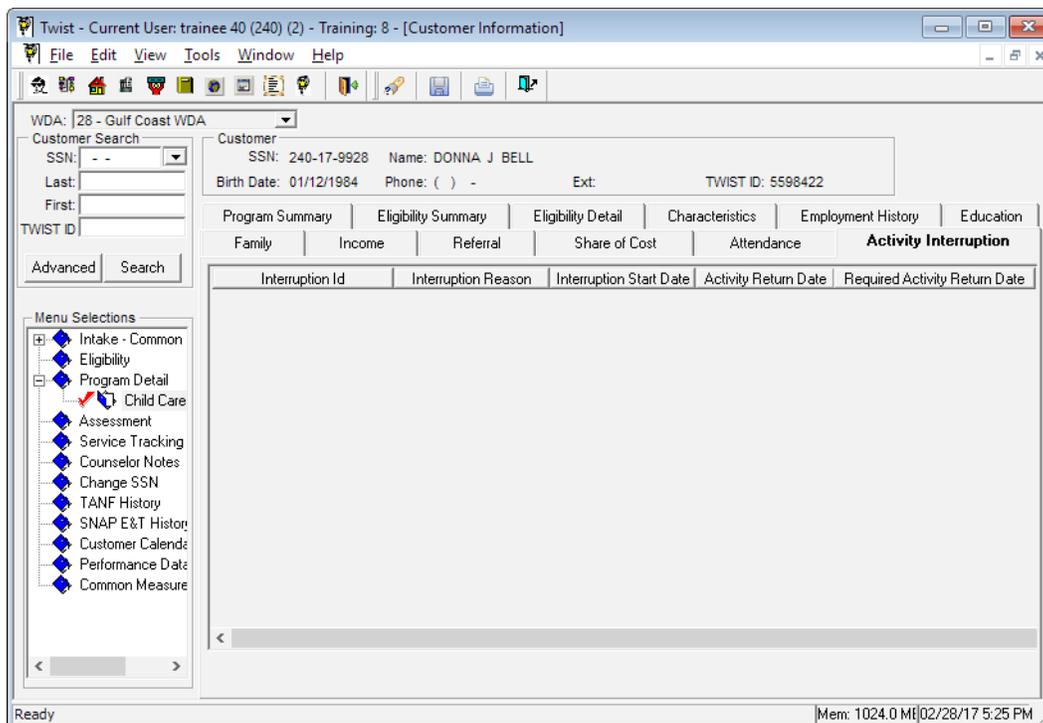
Directions: Terminate the eligibility period for Sophie Johnson.

Activity Interruption

If a family experiences a permanent loss of employment or education but has a plan to return, they may continue to receive child care for up to 90 days or until the eligibility period expires, whichever comes first, while they seek employment or enroll in school. Enter the Activity Interruption in TWIST to track the time.

To enter an Activity Interruption:

1. Click on the Activity Interruption tab from the customer's active Child Care Program Detail. The Activity Interruption screen displays.



- Right-click and select Add a line. The Activity Interruption pop-up displays.

Interruption Reason:

Interruption Start Date:

Activity Return Date:

Required Activity Return Date:

OK Cancel

- Select the Interruption Reason from the dropdown menu.
- Enter the Interruption Start Date. Refer to the Managing Interruptions Desk Aid for more information on when to begin interruptions.
- Leave the Activity Return Date blank. This is the day the customer reports a return to work or school.
- The Required Activity Return Date automatically populates with the date three months from the Interruption Start Date.
- Click Ok
- Save. An Interruption line displays.

WDA: 28 - Gulf Coast WDA

Customer Search

Customer: SSN: 240-17-9928 Name: DONNA J BELL
 Birth Date: 01/12/1984 Phone: () - Ext: TWIST ID: 5598422

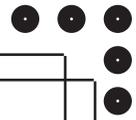
Program Summary | Eligibility Summary | Eligibility Detail | Characteristics | Employment History | Education
 Family | Income | Referral | Share of Cost | Attendance | **Activity Interruption**

Interruption Id	Interruption Reason	Interruption Start Date	Activity Return Date	Required Activity Return Date
9601	1 - Job Search	02/28/2017	00/00/0000	05/28/2017

Menu Selections

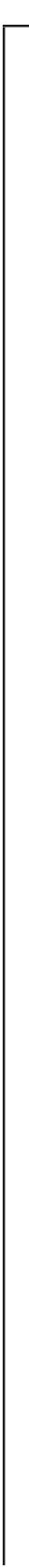
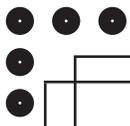
- Intake - Common
- Eligibility
- Program Detail
 - Child Care
 - Assessment
 - Service Tracking
 - Counselor Notes
 - Change SSN
 - TANF History
 - SNAP E&T History
 - Customer Calend
 - Performance Dat
 - Common Measure

Ready | Mem: 1024.0 MB | 02/28/17 5:32 PM



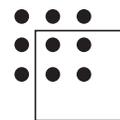
To record the customer's return to work or school/training:

1. Double click on the Activity Interruption line. The Activity Interruption pop-up displays.
2. Enter the Activity Return date as the day the customer returns to work or school/training.
3. Click OK
4. Save

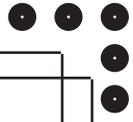


USING THE WORKFORCE SOLUTIONS FINANCIAL AID MANAGEMENT SYSTEM (FAMS)

Using the WFS
Financial Aid Management
System (FAMS)



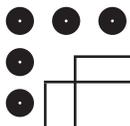
NATIONAL WORKFORCE INSTITUTE



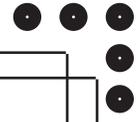
INTRODUCTION

The Financial Aid Management System (FAMS) is a web-based system for recording all financial aid transactions and information, except child care, for customers. The system is used to:

- Record scholarship awards to customers
- Create future commitments for substantial assistance
- Create vouchers and payment requests
- Record short-term support issuances and track cash substitute inventory
- Pay bills-done by the Financial Aid Payment Office (FAPO)
- Track budgets
- Create Financial Aid Reports



NOTES



FAMS GLOSSARY OF TERMS

Account - Financial aid given to customers is tracked in either a Support Account or Training Account in FAMS.

Account Budget - The amount of funds available in a customer's Training or Support Account. Budgets are based on the financial aid limits and can be adjusted only with a manager's approval.

Alert - A feature on Case Notes in FAMS that creates a reminder on the Home page regarding that note.

Approved - A voucher can be printed only after it has been marked 'Approved' by the FAPO. Vouchers which have not been approved display the watermark 'Invalid Voucher.'

Career Office User - A User created for the Financial Aid Support Center (FASC) to assign customers approved for substantial financial aid to the office, indicating approved eligibility.

Check Request - Used when support services are provided by a vendor who does not accept Workforce Solutions purchase orders.

Crumb Trail - A list of the pages you visited to arrive at the current page, displayed as links. Click on any of these links to quickly navigate to those pages.

Customer Record - An electronic record containing basic customer information such as name, date of birth, address, and phone number

Customer Service Representative - The staff person at the career office providing services to the customer.

Cap - The maximum amount Workforce Solutions will pay for training regardless of the total cost. Also referred to as Financial Aid Limits. The limits are:

- Scholarship/Training: \$6,000
- Basic Education Training: \$3,000
- Other Support: \$1,000
- On-the-Job Training (OJT): N/A
- TAA: \$17,000

Disbursement Receipt - The transaction used in the Support Account to record the issuance of a cash sub, i.e. gas card, bus pass, gift card. This provides a receipt of the transaction for the customer to sign.

FAPO - Financial Aid Payment Office

Fund Source - The funding stream used to pay for the customer's financial aid.

Line Item Categories - Item categories available to list on a voucher. For example, Basic Education: Books, Global Cash: Tuition; Career Training: Supplies, etc.

Outcomes - The result of the customer's training, i.e. where they went to work.

Program - A Program in a Support Account is a defined category of financial aid, i.e. short-term, or substantial. A Program in a Training Account is the customer's area of study. For example, Nursing or Accounting.

Provider - The school or business to whom payment will be made, i.e. Vendor.

Purchase Order (PO) - A voucher created in FAMS which allows customers to receive products or services for which the vendor will invoice Workforce Solutions. The vendor then submits the PO and invoice for payment to FAPO.

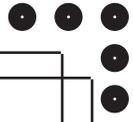
Quick Search - The quick search field at the top of the screen allows you to search for customers by:

- Last Name
- First Name
- Social Security Number
- TWIST ID
- Voucher ID
- Account ID

Scholarship Voucher - A form generated by FAMS authorizing payment for specific items for a customer from a vendor. The vendor then submits the voucher and invoice to FAPO for payment.

Submit for Approval - The button on the View Voucher screen which sends the voucher to the FAPO for review and approval.

Support Account - Allows Workforce Solutions staff to track a customer's receipt of both short-term and substantial financial aid not related to training or OJT. Only one Support Account can be open at a time.

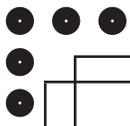


Total Cost - The total cost of a training program. This includes tuition, books, supplies, and other costs.

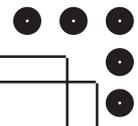
Training Account - Allows Workforce Solutions staff to track a customer's receipt of Workforce Solutions training scholarships and training support. Only one Training Account can be open at a time.

Voucher - Authorization for payment. A voucher may be in the form of a:

- Check Request,
- Scholarship Voucher, or
- Purchase Order.



NOTES



WORKFORCE SOLUTIONS FINANCIAL AID

Workforce Solutions financial aid policy defines two forms of financial aid for customers:

- **Short-term Assistance** is one time assistance to help a customer go to work or continue working, and
- **Substantial Assistance** is for longer term needs for work search and education assistance and is part of an extended relationship between Workforce Solutions and the customer. It requires the customer to complete the Workforce Solution Financial Aid Application and be determined eligible for one or more fund streams.

Both forms of financial aid are further restricted by annual limits. Refer to the Financial Aid Limits by Type of Assistance desk aid and the most recent financial aid issuances on the Workforce Solutions website for more information on limits and Workforce Solutions financial aid policy.

We use two systems to track the financial aid given to customers:

- **TWIST** to track customer services, write notes, and determine funding eligibility, and
- **FAMS** to track financial aid distribution and limits.

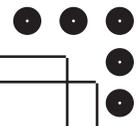
Although Workforce Solutions financial aid is defined as short-term and substantial assistance, we track financial aid in FAMS as:

- **Training** - any costs involved in education or training, including tuition, books, fees, supplies and other support such as uniforms, immunizations and tools, and
- **Support** - any financial assistance other than that related to training and/or training support.

Because of this there are slightly different processes in FAMS for recording the assistance provided to customers who need:

- Short-term assistance
- Substantial assistance that is not education/training or education/training related
- Training/education tuition, books and fees
- Additional training/education support

This module will take you through all aspects of using the FAMS; logging on, creating a customer record, opening and working in a Training and Support Account, creating vouchers, and closing an account.



Logging In

To log in to FAMS:

1. Open Internet Explorer. FAMS only works in Internet Explorer.
2. Type https://apps2.cpaz.com/Gazelle_Texas_NCI in the address bar to log into the live system. Type https://apps2.cpaz.com/Gazelle_Texas_NCI_Training2/Login.aspx to login to the Sandbox.
3. Press Enter. The Gazelle Sign In screen displays.



4. Enter the User Name provided to you by your supervisor.
5. Enter your password. Passwords are case sensitive and must contain at least one upper case letter and one number.
6. Click Sign In or press Enter.

PASSWORD RESET:

To have your password reset, contact your Local Information Security Officer (LISO). If your LISO is not available ask your manager/supervisor to request your password be reset through the Workforce Security email (workforcesecurity@wrksolutions.com). Too many failed login attempts triggers FAMS to lock you out. If this happens, wait approximately ten minutes to try logging in again.

The Customer Service Home page displays.

All customer accounts in FAMS are assigned to a career office, not to staff; therefore, the links to view "My" information should return no results. The person creating a Training or Support Account assigns the account to the "Career Office."

Alerts display on the Career Office Home page. An Alert tells the office a voucher is approved and can be printed.

	Date	Activity Kind	Alert Kind	Alert Text	User	Customer	Account Kind
View Clear Alert	9/9/2015	Voucher Void	Void Voucher	Wrong Amount.	McCoy, Lisa	Marker, Audrey	Support
View Clear Alert	8/26/2015	Case Note	Case Note	Voucher approved Im8/25/2015	McCoy, Lisa	Williams, Janie	Training

There are 2 Alerts.

Navigate through FAMS using the left navigation bar and the Crumb Trail at the top of the screen. Your navigation options will change based on your permissions and the Crumb Trail will change as you move through the system.

Use the Customer Service Home screen:

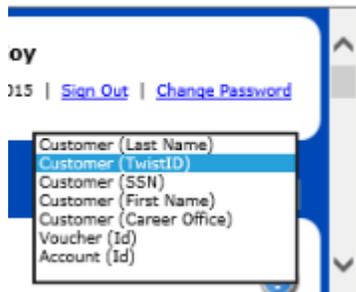
- Search for customers
- Add customers
- View career office customers and accounts
- View Alerts

Locating, Viewing, and Creating Customer Records

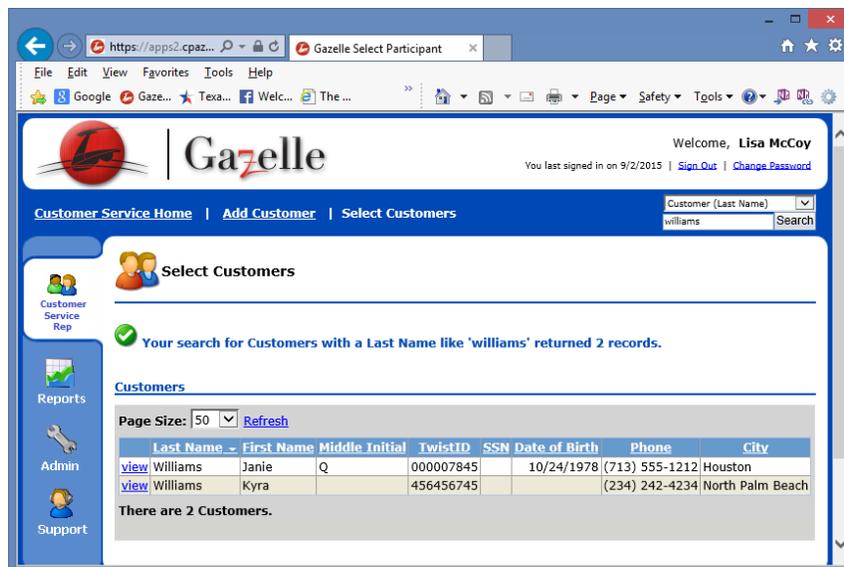
To locate a customer record:

1. From the Customer Service Home screen, select how you want to search for the customer from the Search dropdown menu on the top right of the screen

- a. Last Name
- b. Career Office
- c. First Name
- d. Account Number
- e. TWIST ID
- f. Voucher Number
- g. SSN



8. Press Enter or click Search. To search using only the last four digits of the customer's SSN, select SSN as the search method and enter the last four digits of the customer's Social Security Number. The Select Customers list displays.



Choose your customer from the list by clicking on the “view” link to the left of the customer’s name. If the customer record does not display in the list, you must create a new record.

If you locate a duplicate customer record, notify the Systems Analyst at FAPO.

The View Customer screen displays the customer's record. The customer record displays basic customer information such as contact information, Support and Training Accounts currently open, and Lifetime Expenses based on all accounts. There are also links to view any closed Support or Training Accounts.

The screenshot shows the 'View Customer - Audry Marker' page. The breadcrumb trail at the top reads 'Customer Service Home | My Customers | View Customer'. Below the breadcrumb trail are three buttons: 'Edit Customer', 'Add Support Account', and 'Add Training Account'. The 'Add Support Account' and 'Add Training Account' buttons are grayed out. The page is divided into sections: 'Customer Information', 'Customer Support Account', and 'Customer Training Account'. The 'Customer Information' section includes fields for TwistID, SSN, Name, Date Of Birth, Gender, Street Address, Primary Phone, Secondary Phone, and Email Address. The 'Customer Support Account' section includes fields for Account ID, Account Status, Workforce Solutions Staff, Career Office/Unit, Program, Budget Adjustment, Encumbrances, Expenses, and Available Budget. The 'Customer Training Account' section is partially visible at the bottom.

Callout Boxes:

- Crumb Trail:** The Crumb Trail at the top shows where you are and how you got there. Use the links to navigate to previous pages.
- Buttons:** Grayed out buttons mean:
 - There is an account open, or
 - You don't have access
- SSN:** 'None' defaults if you don't enter an SSN.
- Customer Information:** Basic customer and contact information.
- Support Account ID:** Support Account IDs begin with 'SA'.
- Workforce Solutions Staff:** When an account is created, the Workforce Solutions Staff field is changed to the Career Office.
- Career Office/Unit:** The Career Office/Unit is also the Career Office.
- Budget:** The total budget is based on the Program chosen when the account is created.

Module 3: Using the Workforce Solutions Financial Aid Management System (FAMS)

Customer Training Account

[View this training account](#)

Account ID: [TA1172992373160](#)

Account Status: Open

Workforce Solutions Staff: McCoy, Lisa

Career Office/Unit: Financial Aid Payment Office/N/A

Program: Accounting

Budget Adjustment: \$0.00

Encumbrances: \$0.00

Expenses: \$0.00

Available Budget: \$6,000.00

[View Closed Training Accounts \(0\)](#)

Customer Lifetime Expenses (All Accounts)

Account Type	Expenses	Encumbrances
Support	\$0.00	\$0.00
Training	\$0.00	\$0.00
Total	\$0.00	\$0.00

[Edit Customer](#) [Add Support Account](#) [Add Training Account](#)

Training Account IDs begin with 'TA'.

Encumbrances: Shows money given to the customer in the form of a voucher or PO for which Workforce Solutions will be billed.

Expenses: Money paid to the customer such as cash substitutes or checks.

Available Budget is the amount remaining in the account after Expenses are subtracted from the cap on the account.

All financial aid given to the customer is reflected in the Lifetime Expenses.

To edit the customer's information:

1. Click the Edit button at the top or bottom of the screen.
2. Make changes.
3. Click Save.

To create a new customer record:

Career Office Staff create the customer record in FAMS. Before you add a new customer, search using a variety of criteria to avoid creating a duplicate record. When you create the customer's record FAMS assigns it to you. When a Training or Support account is created the person assigned to the customer is changed by FASC staff. Once a customer record is created it remains in the system.

1. From the Customer Service Home screen, click on the Add Customer link. The Add Customer page displays.

The screenshot shows the 'Add Customer' page in the Gazelle system. At the top, there is a navigation bar with the Gazelle logo, a welcome message for Lisa McCoy, and a search bar for customer names. Below the navigation bar, there is a sidebar with navigation links for Customer Service Rep, Reports, Admin, and Support. The main content area is titled 'Add Customer' and contains a 'Customer Information' section with various input fields. The fields are: TwistID: * (required), SSN, First Name: * (required), Middle Initial, Last Name: * (required), Date Of Birth: * (required), Gender (dropdown menu with 'Male' selected), Address Kind: * (required, dropdown menu with 'Home' selected), and Address 1: * (required). There are 'Save' and 'Cancel' buttons at the top of the form.

2. Enter the customer's information. Items marked with an asterisk* are required fields.
 - a. TWIST ID - a unique TWIST ID is required for each customer
 - b. SSN - not a required field, but enter it if you have it. SSN is a unique identifier for the customer which allows staff to search using the full SSN or the last four digits.
 - c. Customer's full name
 - d. Date of Birth
 - e. Gender

Module 3: Using the Workforce Solutions Financial Aid Management System (FAMS)

- f. Address and Phone Number. FAMS automatically fills in the City, State and County fields if you enter the Zip Code and then click the 'Autofill' button. If multiple cities are associated with the Zip Code, select the city from the dropdown menu in the City field.

ZIP: *

7. Click Save. A reminder displays at the top of the page when required information is not completed.

Customer Service Rep

Save Cancel

A text entry is required. - TwistID

The date is invalid. - Date Of Birth

A Customer phone number is required.

Customer Information

TwistID: *

SSN:

First Name: * Anikan

Middle Initial:

Last Name: * Skywalker

Date Of Birth: 1/25/1991

Gender: Male

Address Kind: * Business

Address 1: * 1234 Skywalker Lane

8. Complete the information and click Save. The View Customer screen displays.

Customer Service Home | Add Customer | View Customer

Customer (First Name) audry Search

View Customer - Audry Marker

Edit Customer Add Support Account Add Training Account

The Customer has been successfully created.

Customer Information

TwistID: 024546

SSN: None.

Name: Audry Marker

Date Of Birth: 5/29/1977

Gender: Female

Street Address: (Home)
124 Credetate Circle
Tomball, TX 77375

Primary Phone: (Mobile) (832) 545-6666 ext.

Secondary Phone: None.

Email Address: (Home) AMarker@gmail.com

To make changes to the customer's information, click Edit at the top or bottom of the screen.

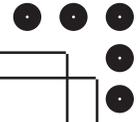
Support Accounts

Open a Support Account when a customer requests financial aid other than training or training support. The Support Account allows you to track the customer's limits for financial aid other than training or training support. Each Support Account earmarks a specified amount for that customer. This limit restricts the amount of funds that can be paid to the customer from that account. Only one Support Account can be opened for a customer at a time. Once the Support Account budget has been reached, no further support can be given until the budget is adjusted or the account is closed and a new one is opened. Only a manager can authorize a budget increase for more than the established financial aid limits. When the Support Account is closed any remaining funds are released back into the general funds.

Short-Term Support:

Cash Sub

1. Career Office staff assess the customer and make the eligibility determination via the application Addendum. They enter a TWIST Counselor Note documenting eligibility and suitability and complete the Support Service Award Contract. The counselor note must also reflect verification the customer has not previously received support from Workforce Solutions. They submit the Cash Sub Request, the signed Orientation to Complaint form, and the customer's I-9 documentation to the designated Career Office staff to obtain the short term support.
2. Designated staff verifies information/eligibility, locates or creates a customer record in FAMS, and opens a Support Account - Short Term on the customer record.
3. Staff swipe or scan the distributed cash sub(s) into the Support Account and print the Disbursement Receipt.
4. The customer signs the Support Service Award Contract, and staff scans it into DocuWare.
5. The Tracking Unit enters the cash sub on the Support Service tab, opens service(s) in TWIST as needed, and closes the Support Account.



Check Request

1. Career Office staff assess the customer and make the eligibility determination via the application Addendum. They enter a TWIST Counselor Note documenting eligibility and suitability and complete and the Support Service Award Contract form. The counselor note must also reflect verification the customer has not previously received support from Workforce Solutions. They scan the Cash Sub Request, the signed Orientation to Complaint form, and the customer's I-9 documentation into DocuWare.
2. The Tracking Unit verifies information/eligibility, locates or creates a Customer Record, opens a Support Account in FAMS, creates the Check Request, and submits it to FAPO for approval.
3. FAPO reviews the request, cuts a check, and sends it to the Career Office. Note: checks are cut on Monday and Friday and delivered on Wednesday and Friday.
4. Customer signs the Support Service Award Contract and staff scans it into DocuWare and enters a Counselor Note in TWIST documenting distribution of check.
5. The Tracking Unit confirms information in both TWIST and DocuWare, opens services, enters the support on the Support Services tab, writes a Counselor Note in TWIST, and closes the Support Account.

Substantial Support (other than training or training support):

- Career Office staff conducts the initial assessment, determines the customer's suitability, access to other funding sources, and willingness to establish a working relationship with Workforce Solutions.
- Career Office staff helps the customer complete the financial aid application and collect documentation, and document the discussion in a TWIST Counselor Note.
- The application and documents are scanned into DocuWare and labeled.
- FASC staff makes an eligibility determination, creates a TWIST Program Detail, and Counselor Note. They send an email or FACS Issue to the designated career office staff to inform the career office of the customer's eligibility determination, and notifies the customer of the eligibility determination and of the requirement to return to the Career Office to complete the process.

Cash Sub

1. When the customer returns to the career office, staff completes the assessment and service plan, completes the Support Service Award Contract and submits it to the designated staff.
2. Designated staff verifies information/eligibility, locates or creates a customer record in FAMS, and opens a Support Account – Substantial on the customer record.
3. Career office staff swipes the distributed cash sub(s) into the Support Account and prints the Disbursement Receipt.
4. The customer signs the Support Service Award Contract and Disbursement Receipt then staff scans both into DocuWare and writes a Counselor Note in TWIST indicating distribution of the cash sub and whether or not to close the Support Account.
5. The Tracking Unit enters the cash sub on the Support Service tab and opens service(s) in TWIST, as needed, and takes appropriate action on the Support Account based on the Counselor Note in TWIST.

IMPORTANT NOTE:

If a Global Cash card is given to the customer, the Tracking Unit will create a Purchase Order in FAMS for the Global Cash load/re-load, and move the Support Service Award in DocuWare to the Global Cash list. The FASC will add funds to the cards within twenty-four hours.

Check Request

1. When the customer returns to the career office, staff completes the Support Service Award Contract and scans it into DocuWare.
2. The Tracking Unit verifies information/eligibility, locates or creates a Customer Record, opens a Support Account – Substantial in FAMS, creates the Check Request and submits it for approval, and enters a Counselor Note in TWIST
3. FAPO reviews the request, cuts a check, and sends it to the career office.
Note: checks are cut on Monday and Friday and delivered on Wednesday and Friday.
4. Career office staff contacts the customer upon receipt of the check.
5. The customer signs the check stub and Support Service Award Contract, career office staff scans it into DocuWare, and enters a Counselor Note in TWIST documenting distribution of the check.
6. The Tracking Unit confirms information in TWIST and DocuWare, opens services, enters the support on the Support Services tab, creates a Counselor Note in TWIST, if needed, and takes appropriate action on the Support Account based on the Counselor Note in TWIST.

Create a Support Account

To create the Support Account:

1. From the View Customer screen, click Add Support Account. The Add Support Account screen displays with Workforce Solutions Staff populated.

The screenshot shows the 'Add Support Account' interface. At the top, there's a navigation bar with 'My Customers', 'View Customer', and 'Add Support' links. Below that, a search bar is visible. The main content area is titled 'Add Support Account - Audry Marker'. It features a 'Support Account Information' section with the following fields:

- Description:** A text input field.
- Workforce Solutions Staff: *** A dropdown menu with 'McCoy, Lisa' selected and a 'Select' button.
- Fund Source: *** A dropdown menu with a 'Select' button and a 'Clear' button.
- Program: *** A dropdown menu with a 'Select' button and a 'Clear' button.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

2. Complete all fields.
 - a. Description: enter the category of short-term support; i.e. transportation, uniforms, tools, etc.
 - b. Change the Workforce Solutions Staff name to the name of the office from which the request was submitted.
 - c. Select the Fund Source. Note: The Fund Source can be changed later, if needed.
 - d. Program: Select either Short-term support or Substantial support
 - e. Click Save. The View Support Account screen displays. An account number is assigned to each new account. Support Account numbers begin with 'SA'.

Service Rep

Edit

Other Actions: Add Case Note [Go] Add Voucher: Check Request [Go]

Account Summary

Customer Name:	Marker, Audry
Customer TwistID:	024546
Customer SSN:	
Account ID:	SA1987833613188
Account Kind:	Support
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	Financial Aid Payment Office/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$0.00
Expenses:	\$0.00
Available Budget:	\$600.00

Support Account Information

Description:	Tools to go to work at ABC Co.
Fund Source:	DW 2015
Program:	General Support

Program Information

Budget:	\$600.00
---------	----------

Account Activities

- **Account Summary:** Provides all Support Account details as well as a summary of activity.
- **Support Account Information:** Displays the Fund Source and the Program for this account.
- **Program Information:** Displays the total budget for this Support Account.
- **Account Activities:** Displays the entire history of all activities within this account. Manual Case Notes may be added to the activity list.

Once the Support Account is created, click Edit on the top of the screen to change the description.

Working in the Support Account

Actions you can take in the Support Account are:

- Add a Case Note
- Hold Account (FAPO Only)
- Change Workforce Solutions Staff
- Close Account
- Change Fund Source
- Enter Cash Sub
- Adjust Budget Amount
- Add a Check Request
- Add a Purchase Order

Add a Case Note

Case Notes become a permanent part of the customer's record in FAMS and can be used as reminders by setting an Alert on the note. An Alert on a Case Note puts it on the Home screen of the person to whom the account is assigned. To add a Case Note:

1. Select Add Case Note from the Other Actions dropdown menu and click Go. The add Case Note screen displays.
2. Check the "Set an alert on this note" box for an Alert to show on the Home page.
3. Enter your note.
4. Click Save. The Case Note Screen displays.

Add Case Note - Audry Marker

Save Cancel

Account Summary

Customer Name:	Marker, Audry
Customer TwistID:	024546
Customer SSN:	
Account ID:	SA1987833613188
Account Kind:	Support
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	Financial Aid Payment Office/N/A

Budget Adjustment: \$0.00
Encumbrances: \$0.00
Expenses: \$0.00
Available Budget: \$600.00

Case Note

Alert:
 Set an alert on this note

Notes: *

Save Cancel

Change the Workforce Solutions Staff Assigned to the Account

When a customer's record is created in FAMS, the person who creates it is noted as the Workforce Solutions Staff. When a Support Account is created, the option to change the staff name for the account is activated. The staff name must be changed to the appropriate staff's name when a support service is being recorded (shown above); however, if edits need to be made to the account, the staff name can be changed at other times.

From the View Support Account screen:

1. Select Change Workforce Solutions Staff from the Other Actions dropdown menu and click Go. The Change Account Workforce Solutions Staff screen displays.

The screenshot shows the 'Change Account Workforce Solutions Staff' screen. The top navigation bar includes 'Customer Service Home', 'My Customers', 'View Customer', and 'View Support Account'. The main title is 'Change Account Workforce Solutions Staff - Audry Marker'. Below the title are 'Save' and 'Cancel' buttons. The 'Account Summary' section displays the following information:

Customer Name:	Marker, Audry
Customer TwistID:	024546
Customer SSN:	
Account ID:	SA1987833613188
Account Kind:	Support
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	Financial Aid Payment Office/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$0.00
Expenses:	\$0.00
Available Budget:	\$600.00

The 'Workforce Solutions Staff' section includes a 'Reason: *' dropdown menu, a 'Last Name Starts With:' search field with a 'Filter' button, and a table of staff members. The table has columns for 'Last Name', 'First Name', and 'Career'. The first row shows 'Alexander' and 'Kim' with 'Cypress/N/A' as the career.

Last Name	First Name	Career
Alexander	Kim	Cypress/N/A

2. Enter a Reason for the change.
3. Choose the staff to whom you are assigning the account.
 - a. Enter the first few letters of the staff's last name.
 - b. Click Filter.
 - c. Click the button next to the name of the staff to whom you wish to assign the account.
 - d. Click Save.

Cash Subs

Workforce Solutions uses Cash Substitutes (Cash Subs) as one way to provide financial aid. Cash Sub cards are available from a variety of vendors to meet the customer's needs: Wal-Mart, Target, Home Depot, JC Penny, Chevron, etc. Cash Sub cards are sent to the career office after they have been scanned into FAMS to record each card in the office's Cash Sub inventory. When a Cash Sub is given to the customer it is scanned to remove it from the inventory.

From the Customer Record:

1. Click on the Support Account ID. The View Support Account screen displays.

The screenshot shows the 'View Support Account' interface for Janie Williams. The page includes a navigation menu on the left with options like 'Customer Service Rep', 'Reports', 'Admin', and 'Support'. The main content area is divided into several sections:

- Account Summary:**
 - Customer Name: [Williams, Janie](#)
 - Customer TWIST ID: 352698555
 - Customer SSN: [Redacted]
 - Account ID: SA1452731196171
 - Account Kind: Support
 - Account Status: Open
 - Workforce Solutions Staff: McCoy, Lisa
 - Career Office/Unit: N/A/N/A
 - Budget Adjustment: \$0.00
 - Encumbrances: \$0.00
 - Expenses: \$0.00
 - Available Budget: \$800.00
- Support Account Information:**
 - Description: Tools, Uniform, and Transportation to go to work
 - Fund Source: TANF Choices 2015
 - Program: General Support
- Program Information:**
 - Budget: \$800.00
- Account Activities:**
 - Page Size: 25 | Refresh
 - Table with columns: View, Date, Kind, User
 - Activity: 9/18/2015, Account Open, McCoy, Lisa

Module 3: Using the Workforce Solutions Financial Aid Management System (FAMS)

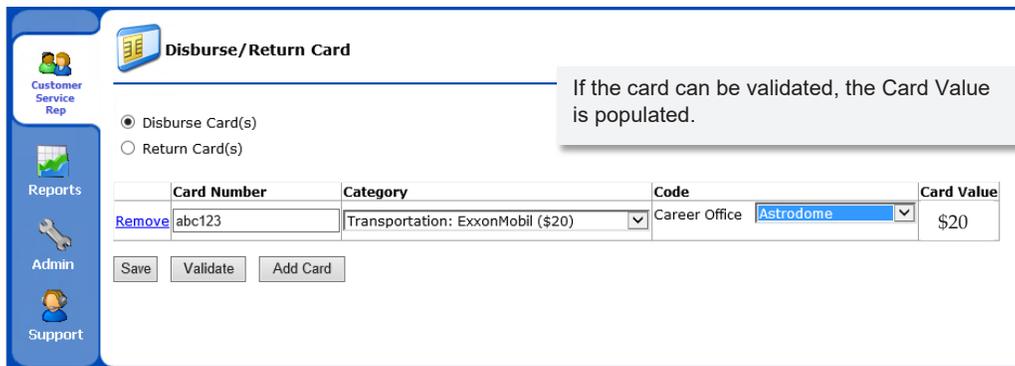
5. Choose Disburse/Return Card from the Other Actions dropdown menu and click GO. The Disburse/Return Card screen displays.

Card Number	Category	Code	Card Value
	[make a selection]		\$0.00

6. With your cursor in the Card Number field, swipe the card you will give the customer. The Card Number field is filled.
7. Choose the Category from the dropdown menu. This is the Line Item Category or reason you're giving the customer the card.
8. Choose the Career Office.
9. Click Validate. The Validation message displays.

Validation Message	Card Number	Category	Code	Card Value
Card not validated for disbursement.	CS1002	Support Services:Clothing for Employment	Career Office Bay City	\$0.00

If the card can be validated, the Card Value is populated.



	Card Number	Category	Code	Card Value
Remove	abc123	Transportation: ExxonMobil (\$20)	Career Office: Astrodome	\$20

7. Choose from these options:

- 'Remove' to remove the card from the Distribution List.
- 'Add Card' to add an additional card to the Distribution List.
- Validate.
- Click Save to distribute the card(s).

NOTE:

If a card cannot be validated, check the office inventory control. If there is a problem contact the FAPO system analyst.

Create a Check Request

A Check Request is issued when support services are being provided by a vendor who does not accept purchase orders. For example, when the participant requires new equipment for his job and the supplier requires payment at the time of purchase. Check Requests are processed by FAPO every Monday and Wednesday and are delivered to the offices by Wednesday and Friday.

Purchase Order/Voucher

A Purchase Order/Voucher is issued to a vendor as a legal promise to pay upon successful delivery of goods or services. Staff creates a Purchase Order/Voucher which is given to the vendor by the customer. The vendor submits the invoice along with a copy of the Purchase Order/Voucher to FAPO for payment. A Purchase Order/Voucher is also created when a Global Cash card is issued and reloaded. A Purchase Order/Voucher can only be created by FASC staff or the Tracking Unit.

To submit a Check Request or a Purchase Order/Voucher:

1. From the View Support Account Home page, select the appropriate option (Purchase Order or Check Request) from the Create Voucher dropdown menu and click Go. The Add (Check Request or Purchase Order) Voucher screen displays.

The screenshot displays the 'Add Check Request Voucher' interface for Audry Marker. It includes a navigation sidebar with 'Customer Service Rep', 'Reports', 'Admin', and 'Support' options. The main content area is divided into two sections: 'Account Summary' and 'Voucher Details'.

Account Summary

Customer Name:	Marker, Audry
Customer TwistID:	024546
Customer SSN:	
Account ID:	SA1987833613188
Account Kind:	Support
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	Financial Aid Payment Office/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$0.00
Expenses:	\$0.00
Available Budget:	\$600.00

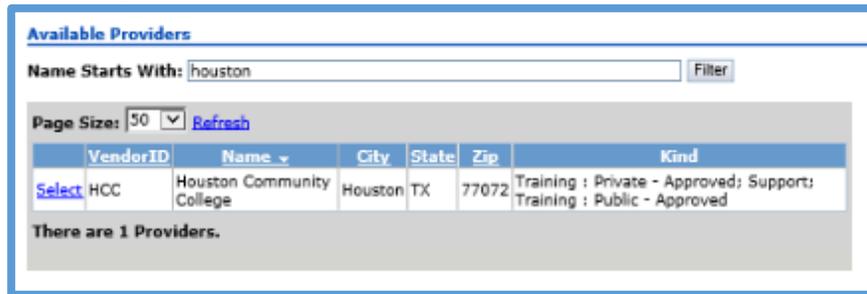
Voucher Details

Identifier:	Gz139122600218	Total Amount:	\$0.00
Status:	Open	Create Date:	9/8/2015
Kind:	Check Request	Issue Date:	9/8/2015
Fund Source:	DW 2015	Expiration Date:	10/8/2015
		Days To Issue:	0
		Days To Expiration:	30

Provider: * Select

Published Comment:

2. Select the appropriate Provider/Vendor.
 - a. Click Select to the right of the Provider field. The provider list populates.
 - b. Type the first few letters of the provider name in the 'Name Starts With' field and click Filter.
 - c. Select the provider from the list by clicking on the Select link on the left of the provider name.



	VendorID	Name	City	State	Zip	Kind
Select	HCC	Houston Community College	Houston	TX	77072	Training : Private - Approved; Support: Training : Public - Approved

There are 1 Providers.

NOTE:

If the provider is not listed, send a FACS request to FAPO using the Add Vendor template in FACS to have the provider added. Include as much provider information as possible, such as name, address, phone number, contact etc.

4. If there are any specific comments or instructions you would like to have printed on the voucher, add them to the 'Published Comment' field.
5. Add individual line items.
 - a. Select item Category.
 - b. Add a Description.
 - c. Add the Amount.
 - d. Click Update.
 - e. Repeat until all items are included on the voucher.
6. Click Save. The voucher is created if:
 - The Support Account has enough budget remaining to pay the voucher, and
 - The Fund Stream used to create the Support Account has enough funds remaining to pay the voucher.

The View (Check Request or Purchase Order Voucher) displays.

Module 3: Using the Workforce Solutions Financial Aid Management System (FAMS)



Workforce Solutions Financial Aid Payment Office
P.O. Box 741361
Houston, TX 77274
workforcesecurity@wrksolutions.com
(713)667-9400
www.wrksolutions.com

CHECK REQUEST
Gz191867629118
THIS FORM IS FOR INTERNAL USE ONLY

Issue Date: 9/8/2015
Expiration Date: 9/8/2015

Participant
Audry Marker
SSN: 024546
124 Credetate Circle
Tomball, TX 77375
(832)545-6666
AMarker@gmail.com
Account #: SA1987833613188

Case Manager
Lynn McCoy
(000)00-0000
Location: Financial Aid Payment Office

Outside Vendor
Houston Community College (HCC)
100 Maple St.
Houston, TX 77072
7131112222
Vendor Account Number: Not on file.

Funding Source
2015

Distribution Instructions
Attach all support documentation along with Check Request.
Check to be mailed directly to vendor: _____ or return to: _____

Item Description	Category	Unit Price / Fee	Quantity	Total
Women's scrubs, top and bottom	Clothing/Uniforms	35.00	1	\$35.00
1 #4 Stethoscope	Clothing/Uniforms	75.00	1	\$75.00
State boards	Testing	25.00	1	\$25.00
Grand Total:				\$135.00

Comments
Only 1 set of women's scrubs and 1 #4 Stethoscope.

Participant Signature: _____

Date: _____

Approved By: _____

(Printed name and signature)

Date: _____

7. From the top or bottom of the page, click Submit for Approval, to send the voucher to the FAPO to approve.

Print the Voucher

Once the voucher is approved the watermark is removed and career office staff can print the voucher. From the view voucher screen:

1. Print the Check Request or Purchase Order voucher.
2. Check Request: Have the customer sign the check stub; then scan it into DocuWare.
3. Purchase Order/Voucher: Instruct customer to present it to the vendor to complete purchase.

Adjust the Budget on a Support Account

When a Support Account is created in FAMS, a budget limit is assigned based on the Program selected and the Workforce Solutions Financial Aid Limits policy. Occasionally, there may be a reason for a manager to override these limits to provide the support the customer needs. The manager must explain the need for the increase and authorization in a TWIST Counselor Note and send a FACS request to the FASC to make the adjustment in FAMS. The FASC will adjust the budget for the Support Account to match the approval of funds. Trackers adjust the budget for Short-term Support Accounts.

From the View Support Account page:

1. Select Adjust Budget Amount from the Other Actions dropdown menu and click Go. The Adjust Budget Amount screen displays.
2. Enter a Reason for the adjustment.

Account Summary	
Customer Name:	Williams, Janie
Customer TWIST ID:	00007845
Customer SSN:	
Account ID:	SA1604328126180
Account Kind:	Support
Account Status:	Open
Workforce Solutions Staff:	McCov, Lisa
Career Office/Unit:	Financial Aid Payment Office/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$0.00
Expenses:	\$0.00
Available Budget:	\$200.00

Adjustment Scenarios	
Current Budget:	200.00
Available Amt.:	200.00
New Adjustment:	0.00 <input type="button" value="Recalculate"/>
New Budget:	200.00 <input type="button" value="Recalculate"/>
New Available Amt.:	200.00 <input type="button" value="Recalculate"/>

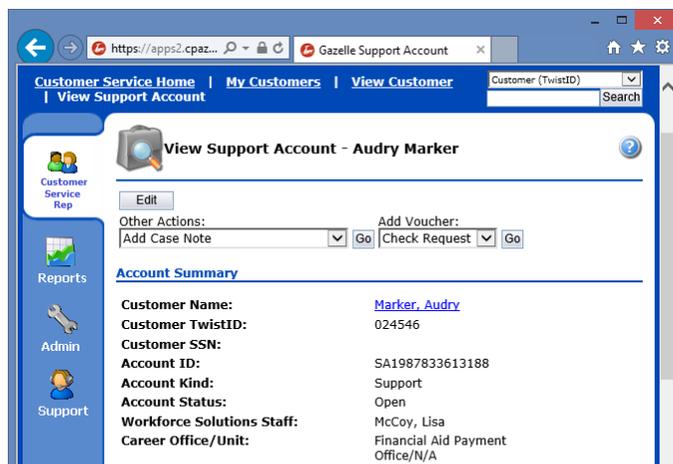
3. Enter the Adjustment Amount. The Adjustment Amount you enter will raise or lower the Budget for this account by that amount. Use the Adjustment Scenarios section of this page to see the effects of your changes.
 - a. **New Adjustment:** Enter the amount to adjust the budget. This will auto-populate the New Budget, New Available Amt, and Adjustment Amount fields.
 - b. **New Budget:** Enter the amount the total budget should be. This will auto-populate the New Adjustment, New Available Amt, and Adjustment Amount fields.
 - c. **New Available Amt:** Enter the amount which should be available in the account. This will auto-populate the New Adjustment, New Budget, and Adjustment Amount fields.
4. When you are satisfied with the Adjustment Amount, click Save. The Budget Adjustment Confirmation displays on the View Support Account screen.

Close Support Account

You close a Support Account:

- When you give a customer short-term support,
- When the customer has reached the limit of substantial support for the year (October 1 – September 30),
- Any time financial aid support is given after the beginning of the grant year. Close the previous year's Support Account and open a new one for the current year.
- When the customer no longer needs Workforce Solutions services.

1. From the View Customer screen, click the Account ID of the Support Account you wish to close. The View Support Account page for the customer displays.



- From the Other Actions dropdown menu, select Close Account and click Go. The Close Account screen displays.

In the Account Outcome section of the screen a warning displays reminding you that once the account is closed it cannot be reopened.

If there are active vouchers -- indicated by a warning in the Account Outcome section -- do not close the account.

Close Support Account - Audry Marker

Save Cancel

Account Summary

Customer Name:	Marker, Audry
Customer TwistID:	024546
Customer SSN:	
Account ID:	SA1987833613188
Account Kind:	Support
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	Financial Aid Payment Office/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$135.00
Expenses:	\$0.00
Available Budget:	\$465.00

Account Outcome

Warning: once this Account is closed, it can not be opened again.

Warning: this account has active vouchers, which may become orphaned if this account is closed.

Actual End Date: *

Save Cancel

- Enter the Actual End Date and click Save. Confirmation of the closure displays.

View Support Account - Audry Marker

Edit

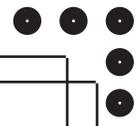
Other Actions: Add Voucher:

Add Case Note Go Check Request Go

The account has been successfully closed.

Account Summary

Customer Name:	Marker, Audry
Customer TwistID:	024546



Training Accounts

Open a Training Account when a customer requests an education/training program or OJT. The Training Account establishes a budget for all expenses including, but not limited to tuition, books, supplies, and other support such as uniforms, tools, immunizations, etc. A Training Account is associated with a specific training provider/vendor and the training program in which the customer is enrolled. It has a budget based on the Eligible Training Provider List (ETPL) for that program. Once the Training Account budget is reached, no further support can be given until the budget is adjusted or the account is closed and a new one is opened. Only a manager can authorize a budget increase for more than the established financial aid limits. When the Training Account is closed, any remaining funds are released back into the general funds. Only one Training Account can be open for a customer.

Use the Training Account to:

- Create vouchers and immediately earmark money for the customer
- Track vouchers issued to vendors and employers
- Print vouchers and award letters
- Manage the financial aid limits for each customer

Initial Request

1. The Personal Service Representative (PSR) develops a financial aid plan with the customer and starts a Service Plan in TWIST. He/she helps the customer complete the Workforce Solutions Financial Aid Application and collect relevant documentation, including training costs, if available; then scans and submits all documents to the FASC through DocuWare.
2. FASC staff reviews documentation and determines eligibility, notifies eligible customers with a phone call, directs the customer to return to the Career Office within ten days, and creates a TWIST Counselor Note to notify the PSR of actions taken, including instructions provided to the customer.
3. If the customer needs the voucher now (indicated by the Counselor Note), the Fulfillment Team opens the Training Account, creates the voucher(s) and submits it for approval. If the voucher is not needed now, the PSR will send a request via FACS requesting the voucher when it's needed.
4. FAPO reviews all newly created vouchers and approves them for funding only. If not approved, FAPO notifies the FASC via FACS.

5. Career Office Staff notifies customer of the available voucher, prints and prepares the voucher and clears the Alert.
6. The PSR reviews and has the customer sign the Customer Responsibilities Agreement and voucher; then scans the signed copies into DocuWare.
7. The customer confirms he/she started school with the PSR who then enters a counselor note in TWIST with the subject line "Training Start Confirmed".
8. The Tracking Unit runs a "Voucher Creation Report" in FAMS and a Counselor Note Report in TWIST to look for "Training Start Confirmed" subject lines; compares the two reports, and opens services for customers on both. If the customer does not appear on either report, the Tracker notifies the PSR.
9. The vendor/provider submits a voucher and invoice to FAPO for payment.

IMPORTANT NOTE:

When funding is not available, customers will be notified of their eligibility but will be placed on the Scholarship Registry, or wait list, until funds become available.

For subsequent semesters/terms:

1. The PSR conducts a reassessment of the customer's situation, updates the Service Plan, obtains new/updated cost information, writes a Counselor Note in TWIST, scans documents in DocuWare, and sends a request for a new voucher via FACS.
2. FASC staff review the request, create the voucher in the Training Account in FAMS, submits it for approval, and enters a Counselor Note in TWIST.
3. FAPO reviews vouchers submitted for approval and approves them for funding only.
4. Career office staff notifies the customer of the available voucher, prints and prepares the voucher and clears the Alert.
5. The PSR reviews and has the customer sign the Customer Responsibilities Agreement and voucher, and scans the signed copies into DocuWare.

6. The customer confirms he/she started school with the PSR who then enters a counselor note in TWIST with the subject line "Training Start Confirmed". The Tracking Unit runs a "Voucher Creation Report" in FAMS and a Counselor Note Report in TWIST to look for "Training Start Confirmed" subject lines, compares the two reports, and opens services for customers on both reports. If the customer does not appear on either report, the Tracker notifies the PSR.

The vendor/provider submits a voucher and invoice to FAPO for payment. For training support after eligibility is approved:

1. When a customer requests support for training, such as tools, uniforms, or supplies after eligibility is approved, the career office staff assesses the customer's need. They ask about any attempts the customer made to obtain support via other organizations and how the support will help customer achieve goals. They enter this information into a Counselor Note in TWIST.

Cash Sub

1. Career office staff complete the Support Service Award Contract and submits it to the designated staff.
2. Designated staff verifies information/eligibility, locates or creates a customer record in FAMS, wipes the distributed cash sub(s) into the Training Account and prints the Disbursement Receipt.
3. The customer signs the Support Service Award; then staff scans it into DocuWare and writes a Counselor Note in TWIST indicating distribution of the cash sub and whether or not to close the Support Account.
4. The Tracking Unit enters the cash sub on the Support Service tab and opens service(s) in TWIST, as needed, and takes appropriate action on the Support Account based on the Counselor Note in TWIST.

IMPORTANT NOTE:

If a Global Cash card is given to the customer, the Tracker will create a Purchase Order in FAMS for the Global Cash load/re-load, and move the Support Service Award in DocuWare to the Global Cash list. The FASC will add funds to the cards within twenty-four hours.

Check Request

1. When the customer returns to the career office, staff completes the Support Service Award Contract and scans it into DocuWare.
2. The Tracking Unit verifies information/eligibility, locates the Customer Record, creates the Check Request, opens services, enters the support on the Support Services tab, and creates a Counselor Note in TWIST.
3. FAPO reviews the request, cuts a check, and sends it to the career office.
Note: checks are cut on Monday and Friday and delivered on Wednesday and Friday.
4. Career office staff contacts the customer upon receipt of the check.
5. The customer signs Support Service Award Contract career office staff scans it into DocuWare, and enters a Counselor Note in TWIST documenting distribution of the check.
6. The Tracking Unit confirms information in TWIST and DocuWare.

Create a Training Account

From the View Customer screen:

1. Click on the Add Training Account button at the top or bottom of the screen. The Add Training Account screen displays.

The screenshot shows the 'Add Training Account' screen for Mia Murphy. The interface includes a top navigation bar with 'Customer Service Home', 'My Customers', 'View Customer', and 'Add Training Account'. A search box for 'Customer (TWIST ID)' is in the top right. A left sidebar contains icons for 'Customer Service Rep', 'Reports', 'Admin', and 'Support'. The main form area is titled 'Training Account Information' and includes fields for 'Description', 'Workforce Solutions Staff' (with a 'Select' button), 'Fund Source' (with 'Select' and 'Clear' buttons), 'Program' (with 'Select' and 'Clear' buttons), 'Provider' (with 'Select' and 'Clear' buttons), 'Start Date' and 'Anticipated End Date' (with calendar icons), 'Is Self-Enrolled?' (radio buttons for 'Yes' and 'No'), and 'Self Funding Kind' (a dropdown menu showing 'NA'). 'Save' and 'Cancel' buttons are located at the top and bottom of the form area.

2. Complete the information:
 - a. Description: Enter the purpose of the account.
 - b. Workforce Solutions Staff: Change to the Career Office Name.
 - i. Click the Select button on the right.
 - ii. Enter the first few letters of the office name in the Last Name Starts With field at the top of the page.
 - iii. Click Search.
 - iv. Click Select to the left of the name you wish to choose.
 - c. Fund Source: Click the Select button on the right to choose the appropriate Fund Source.
 - d. Program: Choose the training program.
 - i. Click the Select button on the right.
 - ii. Enter the first few letters of the program name.
 - iii. Select the program. Be sure to select the correct vendor.

- e. Select the Provider/Vendor. When you choose the program the Provider/Vender populates. If it doesn't, click on "Select" to the right to choose the Vendor
- f. Enter the Start Date for the training
- g. Enter the Anticipated End Date
- h. Enter Self-Enrolled and Self-Funding information if Workforce Solutions is not paying for tuition and fees and you have the information. These are optional fields.
- i. Click Save. The View Training Account screen displays

View Training Account - Mia Murphy

Other Actions: Add Case Note Add Voucher: Check Request Run Report: Budget Worksheet

A new training account has been successfully created.

Account Summary

Customer Name:	Murphy, Mia
Customer TWIST ID:	224687
Customer SSN:	
Account ID:	TA1464156074139
Account Kind:	Training
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	Financial Aid Payment Office/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$0.00
Expenses:	\$0.00
Available Budget:	\$3,000.00

Training Account Information

Description:	2nd Semester Training
Fund Source:	DW 2015
Program:	Adult Basic Education
Provider:	St. Michaels Learning Academy Inc.
Start Date:	9/21/2015
Anticipated End Date:	12/11/2015
Is Self-Enrolled:	No
Self Funding Kind:	NA

- The **Account Summary** section shows all Training Account details and budget activity.

- **Training Account Information** shows the funding stream, the vendor, and the training/education program.
- **Program Information** shows the total budget for this account.
- **Account Activities** shows all actions taken on this account and manual case notes entered.

Program Information

Budget:	\$3,000.00	Total Cost:	\$0.00
Credit Hours:	0	Clock Hours:	0

Account Activities

Page Size: 25 [Refresh](#)

	Date	Kind	User	Alert	Detail
View	9/15/2015	Voucher Creation	McCoy, Lisa		To: St. Michaels Learning A ITA Scholarship # Gz14
View	9/9/2015	Account Open	McCoy, Lisa		

There are 2 Activities.

[Edit](#)

Other Actions: Add Voucher: Run Report:

Once an account is created, click the Edit button on the top right to change the:

- Description,
- Start Date,
- Anticipated End Date,
- Self-Enrollment status, and
- Self-Funding Kind.

Working in the Training Account

Actions you can take in the Training Account:

- Add a Case Note
- Hold Account (FAPO Only)
- Change Workforce Solutions Staff
- Close Account
- Change Fund Source
- Enter Cash Sub
- Adjust Budget Amount
- Add a Check Request
- Add a Purchase Order
- Add a Scholarship Voucher

Add a Case Note

Case notes become a permanent part of the customer's record in FAMS and can be used as reminders by setting an Alert on the note. An Alert on a case note puts it on the Home screen of the person to whom the account is assigned. To add a case note:

1. Select Add Case Note from the Other Actions dropdown menu and click Go. The Add Case Note screen displays.

The screenshot shows the 'Add Case Note - Audry Marker' screen. On the left is a navigation menu with icons for Customer Service Rep, Reports, Admin, and Support. The main content area is titled 'Add Case Note - Audry Marker' and includes 'Save' and 'Cancel' buttons. Below the title is an 'Account Summary' section with the following details:

Customer Name:	Marker, Audry
Customer TwistID:	024546
Customer SSN:	
Account ID:	SA1987833613188
Account Kind:	Support
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	Financial Aid Payment Office/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$0.00
Expenses:	\$0.00
Available Budget:	\$600.00

Below the account summary is a 'Case Note' section. It includes an 'Alert:' section with a checkbox labeled 'Set an alert on this note'. Below that is a 'Notes: *' section with a large text input area. At the bottom of the screen are 'Save' and 'Cancel' buttons.

2. Check the 'Set an alert on this note' box for an Alert to display on the Home page.
3. Enter your note.
4. Click Save.

Change the Workforce Solutions Staff Assigned to the Account

When a record is created in FAMS, the person who creates it is noted as the Workforce Solutions Staff. When a Training Account is created, the option to change the staff name for the account is activated. The staff name must be changed to the Career Office name when the account is created (as shown above); however, if edits need to be made to the account the staff name can be changed at other times.

From the View Training Account screen:

1. Select Change Workforce Solutions Staff from the Other Actions dropdown menu and click Go. The Change Account Workforce Solutions Staff screen displays.

Change Account Workforce Solutions Staff - Mia Murphy

Save Cancel

Account Summary

Customer Name: [Murphy, Mia](#)
Customer TWIST ID: 224687
Customer SSN: [TA1464156074139](#)
Account ID: [TA1464156074139](#)
Account Kind: Training
Account Status: Open
Workforce Solutions Staff: McCoy, Lisa
Career Office/Unit: Financial Aid Payment Office/N/A

Budget Adjustment: \$0.00
Encumbrances: \$365.00
Expenses: \$0.00
Available Budget: \$2,635.00

Workforce Solutions Staff

Reason: *

Last Name Starts With: mccoymccoy Filter

Page Size: 50 Refresh

	Last Name	First Name	Career Office/Unit
<input type="radio"/>	McCoy	Lisa	HGAC/N/A

There are 1 Workforce Solutions Staff.

Save Cancel

2. Enter a Reason for the change.
3. Choose the staff to whom you are assigning the account:
 - a. Enter the first few letters of the staff's last name.
 - b. Click Filter.
 - c. Click the button next to the name of the staff to whom you wish to assign the account.
 - d. Click Save

Cash Subs:

Workforce Solutions uses Cash Substitutes (Cash Subs) as one way to provide financial aid to customers. Cash Sub cards are available from a variety of vendors to meet the customer's needs: Wal-Mart, Target, Home Depot, JC Penny, Chevron, etc. Most Cash Sub cards sent to the career office have been scanned into FAMS to record each card in the office's Cash Sub inventory. Some items, such as bus cards are not scanned, but identified by inventory numbers. When a Cash Sub is given to the customer it is scanned or recorded in FAMS to remove it from the inventory.

From the Customer Record:

1. Click on the Training Account ID. The View Training Account screen displays.

View Training Account - John Smith

Customer Service Rep

Other Actions: Add Case Note Go Add Voucher: Check Request Go Run Report: Budget Worksheet Go

Account Summary

Customer Name:	Smith, John
Customer TWIST ID:	1234
Customer SSN:	
Account ID:	TA1148395711172
Account Kind:	Training
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	N/A/N/A
Budget Adjustment:	\$1,000.00
Encumbrances:	\$85.00
Expenses:	\$60.00
Available Budget:	\$2,775.00

Training Account Information

Description:	
Fund Source:	Adult 2015
Program:	120 Hour Pipe Welding
Provider:	Sparc Academy
Start Date:	9/1/2015
Anticipated End Date:	10/2/2015
Is Self-Enrolled:	No
Self Funding Kind:	NA

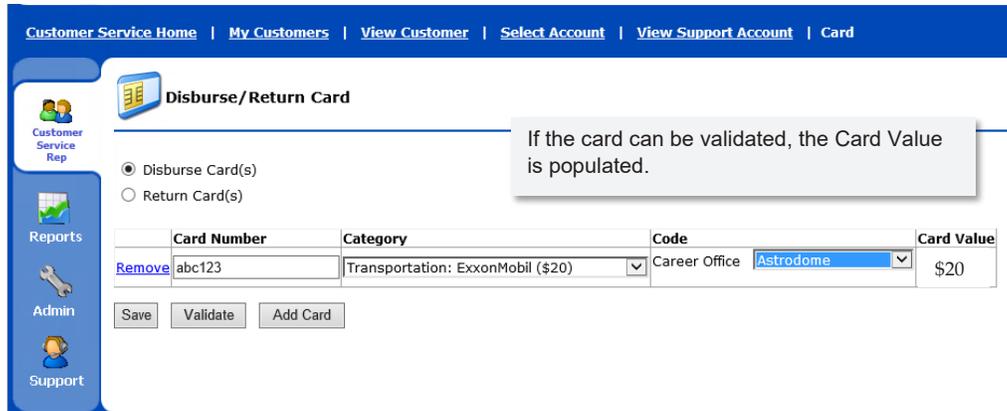
Program Information

Budget:	\$1,920.00	Total Cost:	\$1,920.00
Credit Hours:	0	Clock Hours:	0

Account Activities

- From the Other Actions dropdown, choose Disburse/Return Card and click GO. The Disburse/Return Card screen displays.

- With your cursor in the Card Number field, swipe the card you will give the customer. The Card Number field is filled.
- Choose the Category from the dropdown menu. This is the Line Item Category or reason you're giving the customer the card.
- Choose the Career Office.
- Click Validate. The Validation message displays.



Customer Service Home | My Customers | View Customer | Select Account | View Support Account | Card

Disburse/Return Card

Disburse Card(s)
 Return Card(s)

If the card can be validated, the Card Value is populated.

Card Number	Category	Code	Career Office	Card Value
Remove abc123	Transportation: ExxonMobil (\$20)	Career Office	Astrodome	\$20

Save Validate Add Card

7. Choose from the options:
 - a. **Remove** to remove the card from the Distribution List
 - b. **Add Card** to add an additional card to the Distribution List
 - c. **Validate**
 - d. **Save** to distribute the card(s)

Change the Fund Source of the Training Account

Some circumstances require a change from the current fund stream to continue funding a Training Account:

- Funds are no longer available in the fund stream,
- The grant year has changed,
- The customer is no longer eligible for the funding stream, or
- More services are available from an alternate funding stream.

You cannot change the funding stream for vouchers already created. When the funding stream is changed, all unused funds budgeted for the account are returned to the general funding stream account.

To change the account funding stream:

1. Select Change Fund Source from the Other Actions dropdown list and click Go.

Change Fund Source

Current Fund Source: DW 2015

Reason for Change: *

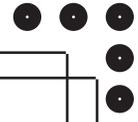
Title Starts With:

Page Size: [Refresh](#)

	Name	Allocation Start Date	Allocation End Date	Encumbrance Start Date	Encu
<input type="radio"/>	Adult 2015	7/1/2015	9/30/2015	7/1/2015	
<input type="radio"/>	Adult 2016	7/1/2015	9/30/2016	7/1/2015	
<input type="radio"/>	TAA 2015	7/1/2014	9/30/2015	10/1/2014	

There are 3 Fund Sources.

2. Enter a Reason for the change.
3. Select the new funding stream.
4. Click Save.



Create a Scholarship Voucher, Check Request, or Purchase Order

Check Request

A Check Request is issued when support services are being provided by a vendor (other than the training vendor) who does not accept purchase orders. For example, when the participant requires specific equipment for training and the supplier requires payment at the time of purchase. Check Requests are processed by FAPO every Monday and Wednesday and are delivered to the offices on Wednesday and Friday. A Check Request can be created by the FASC or Tracking Unit.

Purchase Order

A Purchase Order is issued to a vendor (other than the training vendor) as a legal promise to pay upon successful delivery of goods or services. Staff creates a Purchase Order which is given to the vendor by the customer. The vendor submits the invoice along with a copy of the Purchase Order to FAPO for payment. A Purchase Order is also created when a Global Cash card is issued and reloaded. A Purchase Order can only be created by FASC staff or the Tracking Unit.

Scholarship Voucher

A Scholarship Voucher is issued to the training vendor identified when the Training Account is created and may include tuition, books, fees, and any other expenses paid to the training vendor. FASC staff create the voucher. Career office staff print the voucher and present it to the customer who then gives it to the vendor. The vendor submits the voucher (along with a copy of the invoice) to FAPO for payment.

If Workforce Solutions is paying for both tuition and books, create a separate Purchase Order for bookstores that operate independently from the school. For example, at both the University of Houston and Houston Community College, Barnes & Noble® operates the bookstore. You will need to create a Scholarship Voucher for the school for the tuition and fees and a Purchase Order for Barnes & Nobles for books and supplies.

To create a Scholarship Voucher, Check Request, or Purchase Order:

1. From the View Training Account Home page, select the appropriate option (Scholarship, Purchase Order or Check Request) from the Create Voucher dropdown menu and click Go.

The Add (Scholarship, Check Request or Purchase Order) Voucher screen displays.

Account Summary

Customer Name: [Murphy, Mia](#)
 Customer TWIST ID: 224687
 Customer SSN:
 Account ID: [TA1464156074139](#)
 Account Kind: Training
 Account Status: Open
 Workforce Solutions Staff: McCoy, Lisa
 Career Office/Unit: H-GAC/N/A
 Budget Adjustment: \$0.00
 Encumbrances: \$365.00
 Expenses: \$0.00
 Available Budget: \$2,635.00

Voucher Details

Identifier: Gz153406891810 Total Amount: \$0.00
 Status: Open Create Date: 9/15/2015
 Kind: ITA Scholarship Issue Date: 9/15/2015
 Fund Source: DW 2015 Expiration Date: 10/15/2015
 Days To Issue: 0
 Days To Expiration: 30

Provider: *
 Published
 Comment:

Voucher Line Items

	Category	Description	GL	TBD1	TBD2	Career Office	Qty	Unit Price	Item Total
Add new line item									
Grand Total:									\$0.00

2. Verify the Issue Date is correct. Vouchers expire 30 days from the Issue Date.
3. If creating a Check Request or Purchase Order, select the appropriate Provider/Vendor. If creating a Scholarship Voucher, skip to step three.
 - a. Click Select to the right of the Provider field. The Provider List populates.
 - b. Type the first few letters of the provider name in the 'Name Starts With' field and click Filter.
 - c. Select the provider from the list by clicking on the "Select" link to the left of the provider name.

Voucher Line Items					
	Category	Description	GL	TBD1	
edit delete	Tuition	Fall 2015 late start	5100 (Basic Education : Tuition/Program Costs)	NA (No Code)	NA
Add new line item					

NOTE:

If the vendor is not listed, send a FACS request to FAPO using the Add Vendor template in FACS. Include as much vendor information as possible, such as name, address, phone number, contact, etc.

4. If there are specific comments or instructions you want printed on the voucher, add them to the 'Published Comment' field.
5. Add individual line items:
 - a. Select item Category.
 - b. Add a Description.
 - c. Add the amount.
 - d. Click Update.
 - e. Repeat until all items are included on the voucher.

Workforce Solutions Financial Aid: A Blended Learning Course

6. Click Save. The voucher is created when:

- The Training Account has enough remaining budget to pay the voucher, and
- The funding stream used to create the support account has sufficient funding to pay the voucher.

The View (Scholarship, Check Request or Purchase Order Voucher) displays. Scroll down to view the voucher.



Workforce Solutions
Astrodome
9315 Stella Unit Rd
Houston, TX 77025

SERVICE VOUCHER
Date Voucher Issued: 5/5/2016
Service #: GR176657782417
Service Start Date: 5/5/2016
Voucher Expiration: 6/4/2016
Invoice Deadline: 60 calendar days after Service Start Date

Customer Information:
Jane Williams
123456789
1234 Stywalter Lane
Houston, TX 77375
(713)555-1212
Account #: TA1829131124192

School/Vendor Information:
College of The Woodlands (tax120)
1200 Woodlands Blvd
Houston, TX 77391-0499

Description of Costs				
Category	Item Description	Unit Price / Fee	Quantity	Total
Career Prep/Tuition/Program Costs	Tuition for 2yr certificate or vocational program	300.00	1	\$300.00
Maximum Reimbursable Cost Authorized by This Voucher				\$300.00

Note To Authorized Vendor:
This voucher is authorization to provide goods/services within the amounts listed during the period described. The customer may purchase the items up to the indicated amount. Any purchase in excess of the approved amount, or purchase of items not on this document, are the responsibility of the customer and will not be reimbursed by Workforce Solutions. In accordance with the Agreement in place between the vendor and Workforce Solutions, the vendor must submit a detailed invoice in order to be paid for items/services rendered to the customer no later than 60 calendar days after the Service Start Date indicated on this voucher. Invoices must be sent to the address below, faxed to 713-255-0195, or e-mailed to fa.office@wrksolutions.com.

INVOICE DEADLINE: Vendor must submit invoice by 60 calendar days after Service Start Date: 5/5/2016
Vendor may not invoice Workforce Solutions for any purchase made after the voucher expiration date.

Exclusions
Unless specifically listed otherwise, Workforce Solutions will NOT pay for the following items: Computers, Printers, Software, Tablets, Game devices, Mobile Phones, Watches, college apparel and other school's pin items. No food or beverage at any time.

Comments:
This voucher is for the purchase of the following items:

Terms
Terms are 30 days from the date of our receipt of your invoice.

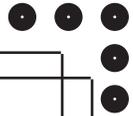
Workforce Solutions Staff:

Customer Signature: _____ Date: _____

Office Manager: _____ Date: _____

Workforce Solutions
Financial Aid Payment Office
 P.O. Box 741361
 Houston, TX 77274-1361
 fa.office@wrksolutions.com

833-469-1085 (5627), select Financial Aid option
 Note: Voucher must have embossed seal to be authentic.



All vouchers have the following dates:

- Date Voucher Issued: This date the voucher is created and cannot be changed.
 - Service Start Date: The date the customer is scheduled to begin classes or receive services. This can be changed by clicking on Change Issue Date on the bottom of the View Voucher page.
 - Voucher Expiration Date: Vouchers expire thirty (30) days after the Service Start Date. Vendors have been notified not to accept expired vouchers.
 - Invoice Deadline: Vendors have sixty (60) days after the Service Start Date to bill FAPO.
7. Click the Submit for Approval button to send the voucher to FAPO for approval.

Print a Voucher

Once a voucher is created a watermark displays until it is approved by the FAPO. When the voucher is submitted for approval, FAPO staff review it and mark it Approved. This creates an Alert in FAMS; "Voucher Approved [Voucher Number]. The Alert appears on the career office Customer Service Home page under Alerts and on the customer's Training Account Activity. When the voucher has been marked 'Approved' the watermark is removed and staff have authorization to print the voucher. Each career office must establish a process to ensure the voucher is printed and given to the customer.

1. Scholarship: Print the Scholarship Voucher and Award Letter from FAMS, and review them with the customer. Have the customer sign the Award Letter and voucher; then scan both into DocuWare.
2. Check Request: Have the customer sign the check stub; then scan it into DocuWare.
3. Purchase Order: Instruct customer to present it to the vendor to complete the purchase.

Void a Voucher

Once a voucher is created, only the Service Start Date can change. For any other changes the voucher must be voided and a new one created. Only FAPO and the FASC can void vouchers.

To void a voucher:

1. From the View Voucher screen, scroll to the bottom of the screen and click Void. The Void ITA Scholarship Voucher screen displays.

Account Summary	
Customer Name:	Murphy, Mia
Customer TWIST ID:	224687
Customer SSN:	
Account ID:	TA1464156074139
Account Kind:	Training
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	H-GAC/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$1,865.00
Expenses:	\$0.00
Available Budget:	\$1,135.00

Void Voucher

Reason: *
Incorrect items and amounts.

2. Enter the Reason for voiding the voucher.
3. Click Save. The View Voucher screen displays with a confirmation of the voided voucher.

The voucher has been successfully voided.

Account Summary

Adjust the Budget on a Training Account

When a Training Account is created in FAMS, a budget limit is assigned based on the Program selected and the Workforce Solutions Financial Aid Limits policy. Occasionally, there may be a reason for a manager to override these limits to provide the support the customer needs. The manager must explain the need for the increase and authorization in a Counselor Note in TWIST and send a FACS request to the FASC to make the adjustment in FAMS. The FASC will adjust the budget for the Support Account to match the approval of funds.

From the View Training Account page:

1. Select Adjust Budget Amount from the Other Actions dropdown menu and click Go. The Adjust Budget Amount screen displays.

Adjust Budget Amount - Mia Murphy

Customer Service Rep

Save Cancel

Account Summary

Customer Name:	Murphy, Mia
Customer TWIST ID:	224687
Customer SSN:	
Account ID:	TA1464156074139
Account Kind:	Training
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	H-GAC/N/A
Budget Adjustment:	\$0.00
Encumbrances:	\$365.00
Expenses:	\$0.00
Available Budget:	\$2,635.00

Adjust Budget Amount

Reason: *

Adjustment Amount: * (Increase or Decrease)

Adjustment Scenarios

Use the Recalculate buttons below to see the effects of changing different elements of the budget.

Current Budget:	3000.00	
Available Amt.:	2635.00	
New Adjustment:	<input type="text" value="0.00"/>	<input type="button" value="Recalculate"/>
New Budget:	<input type="text" value="3000.00"/>	<input type="button" value="Recalculate"/>
New Available Amt.:	<input type="text" value="2635.00"/>	<input type="button" value="Recalculate"/>

Save Cancel

2. Enter a Reason for the adjustment.

3. Enter the Adjustment Amount. The Adjustment Amount raises or lowers the Budget for this account by that amount. Use the Adjustment Scenarios section of this page to see the effects of your changes.
 - a. New Adjustment: Enter the amount to adjust the budget. This auto-populates the New Budget, New Available Amt, and the Adjustment Amount fields.
 - b. New Budget: Enter the amount the total budget should be. This auto-populates the New Adjustment, New Available Amt, and the Adjustment Amount.
 - c. New Available Amt: Enter the amount which should be available in the account. This auto-populates the New Adjustment, New Budget, and the Adjustment Amount.
4. When you are satisfied with the Adjustment Amount, click Save. The Budget Adjustment Confirmation displays on the View Training Account screen.

View Training Account - Mia Murphy

Other Actions: Add Case Note | Go | Add Voucher: Check Request | Go | Run Report: Budget Worksheet | Go

The budget amount has been successfully updated.

Account Summary

Customer Name:	Murphy, Mia
Customer TWIST ID:	224687
Customer SSN:	
Account ID:	TA1464156074139
Account Kind:	Training
Account Status:	Open
Workforce Solutions Staff:	McCoy, Lisa
Career Office/Unit:	H-GAC/N/A
Budget Adjustment:	(\$1,500.00)
Encumbrances:	\$365.00
Expenses:	\$0.00
Available Budget:	\$1,135.00

Close the Training Account

Close the Training Account when:

- The customer has completed the training program.
- The customer has reached the limit of substantial assistance for the year (October 1 – September 30).
- Financial aid is given for the first time after the beginning of the grant year (lose the previous year's Training Account and open a new one for the current year).
- The customer no longer needs or wants Workforce Solutions services.

To close the Training Account:

1. From the View Customer screen, click the Account ID of the Training Account you wish to close. The View Training Account page for the customer displays.

View Training Account - Mia Murphy

Customer Service Rep

Reports

Admin

Support

Other Actions: Add Case Note **Add Voucher:** Check Request **Run Report:** Budget Worksheet

Account Summary

Customer Name: [Murphy, Mia](#)
Customer TWIST ID: 224687
Customer SSN:
Account ID: TA1464156074139
Account Kind: Training
Account Status: Open
Workforce Solutions Staff: McCoy, Lisa
Career Office/Unit: H-GAC/N/A
Budget Adjustment: (\$1,500.00)
Encumbrances: \$365.00
Expenses: \$0.00
Available Budget: \$1,135.00

Training Account Information

Description: 2nd Semester Training
Fund Source: DW 2015
Program: Adult Basic Education
Provider: St. Michaels Learning Academy Inc.
Start Date: 9/21/2015
Anticipated End Date: 12/11/2015
Is Self-Enrolled: No
Self Funding Kind: NA

Program Information

Budget:	\$3,000.00	Total Cost:	\$0.00
Credit Hours:	0	Clock Hours:	0

Account Activities

Module 3: Using the Workforce Solutions Financial Aid Management System (FAMS)

- From the Other Actions dropdown menu, select Close Account and click Go. The Close Account screen displays.

Close Account - Mia Murphy

Save Cancel

Account Summary

Customer Name:	Murphy, Mia
Customer TWIST ID:	224687
Customer SSN:	
Account ID:	TA1464156074139
Account Kind:	Training
Account Status:	Open
Workforce Solutions Staff:	McCov, Lisa
Career Office/Unit:	H-GAC/N/A
Budget Adjustment:	(\$1,500.00)
Encumbrances:	\$365.00
Expenses:	\$0.00
Available Budget:	\$1,135.00

Account Outcome

Warning: once this Account is closed, it can not be opened again.

Warning: this account has active vouchers, which may become orphaned if this account is closed.

Outcome: * Completed: Case Closure

Actual End Date: *

Job Start Date:

Employer:

Job Title:

Hourly Placement Wage: 0.00

Save Cancel

In the Account Outcome section of the screen a warning displays reminding you that once the account is closed it cannot be reopened.

If there are active vouchers, also indicated by a warning in the Account Outcome section, do not close the account.

- Select the appropriate Outcome from the dropdown menu.
- Enter the Actual End Date and click Save. Confirmation of the closure displays.

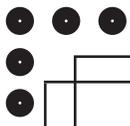
View Training Account - Mia Murphy

Edit

Other Actions: Add Case Note Go Add Voucher: Check Request Go Run Report: Budget Worksheet Go

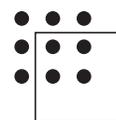
The account has been successfully closed.

Account Summary

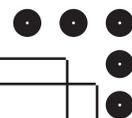


NOTES

USING DOCUWARE



NATIONAL WORKFORCE INSTITUTE



INTRODUCTION

DocuWare is a web-based document management system that allows Workforce Solutions staff to transmit, share, store, and retrieve documents such as financial aid applications, eligibility documents, and tracking paperwork. Using DocuWare allows staff to assist customers in a timely and efficient manner. It also helps staff throughout the system communicate more effectively regarding customer records.

Glossary of Terms

Area - Areas define the accessibility of documents. For example; confidential documents are stored in the confidential area.

Auto Index - DocuWare automatically puts a document on a particular index based on criterion selected when it's stored.

Core Document - A Label used to ensure customer documents that don't change, such as proof of birth and citizenship, are available anytime the customer applies for financial aid.

Desktop Apps - An application installed from DocuWare that allows additional functionality in DocuWare such as "Drag and Drop Documents."

Document Tray - A holding place for items scanned or imported into DocuWare but not yet stored. A place for Financial Aid Support Center (FASC) staff or Trackers to manipulate documents.

File Cabinet - The logical container for documents. The name of the File Cabinet is Workforce.

Import - Using the Import button on top of a Tray in DocuWare brings up a windows file explorer window to select a file to import to that Tray.

Import App - Used in the background by an import computer to import PDFs to a Tray specified by the import configuration from a scanner (MFP).

Index - An identifying field, i.e. First Name, Last Name, TWIST ID, SSN.

Index Fields - Used to identify a document so you can search for it in DocuWare. There are up to 50 Index Fields available.

Label - Used to identify and route the document scanned to the appropriate

place or team. The Label assigns a document to a specific List. For example; 1817s and 2583s are automatically assigned to the Tracking Unit's List; New Childcare-FA App is automatically assigned to the FASC team List.

Layers - Layers tell you if there are additional documents clipped to the original document.

Lists - Lists group documents according to specified Functions or Labels. Lists are defined by the group that will work with the document. There are 46 defined Lists in DocuWare and one 'My List' for every Tracker and FASC user.

Paperclip - Allows you to clip a document to a document consisting of multiple pages stapled together.

Passport Page - A blank page titled Passport used to separate documents when scanning them into DocuWare. The Passport Page triggers DocuWare to create a new document after it is scanned. Always keep a copy in your My Tray. It's also available on the Workforce Solutions website.

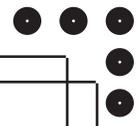
Search - A function on the DocuWare home screen. Searches are set up with index criteria based on permissions. Example of set searches are:

- Quick
- Advanced
- Admin

Split - You can split a stapled document to insert a new page in the location of the split. You can then staple the sections back together. Use split instead of staple when you have a large number of pages in a document.

Stamp - Stamps are used to identify actions on a document. Stamps include:

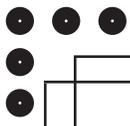
- *Approved*: The Eligibility Team has determined the customer as eligible. The Approved stamp moves the document to the List for the Fulfillment Team to work.
- *Approved Filed*: The Eligibility Team has determined the customer as eligible. The Approved Filed stamp moves the document to the Filed List. No fulfillment is needed.
- *Confidential*: The Confidential stamp puts the document on a List only staff with management permissions can view.
- *Delete*: A page or file is not needed or a duplicate. This does not delete the file, but removes it from basic searches and from a monitor's view. When the stamp is used, the reason for deleting must be documented. A file or document can be permanently deleted only with approval from management.
- *Deny*: The Eligibility Team has determined the customer ineligible. Staff will



- be prompted to choose the reason the application is denied.
- *File*: Indicates an application or document has been worked and can be filed. This stamp is mainly used by the Tracking Units but may be used when an application has been completed but does not need to be fulfilled.
 - *Fulfill*: When an application has been completed by the fulfilment team, the document is stamped. Fulfill to establish a completion of the process. Documents stamped Fulfill are filed.
 - *Move*: Overrides the Auto Index by changing a document's Label or function allowing any open (no completed date) document to move to another List.
 - *Office Action Needed*: Used on documents added to the Action Needed List for whichever Career Office initially uploaded the document. Specific actions needed will be recorded in the 'Notes' field. Response from the office will be typed in the 'Office Note' field on the document and an email notification sent to the FASC or Tracking Unit. Example: Signature Needed.
 - *Work*: The Work stamp indicates a document is currently being worked.

Staple - A multi-page document is stored in DocuWare "stapled. Stapled documents can be "unstapled" so additional pages can be added or so pages can be rearranged. The document can then be stapled back together in a specific order by clicking on the pages in the order they should appear.

Wild Card - (*) used for Searching. Fills in beginning or end of a string to tell DocuWare to search. Ex. To look for a customer using only the last four digits of his/her SSN enter *#### in the SSN index field. The star alerts DocuWare that characters are missing.



NOTES

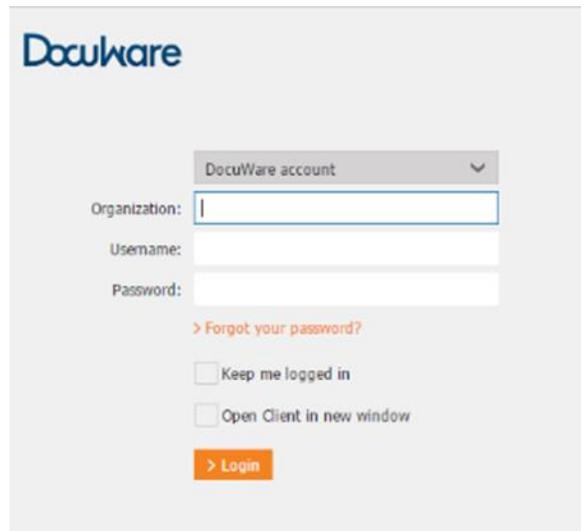
LOG ONTO DOCUWARE

DocuWare functions best when using the Google Chrome web browser and will not function in Linux or Mac browsers.

To log onto the DocuWare system, enter <https://DocuWare.wrksolutions.com> in your web browser address bar. *Save the address on your desktop or as a Favorite on your taskbar.*

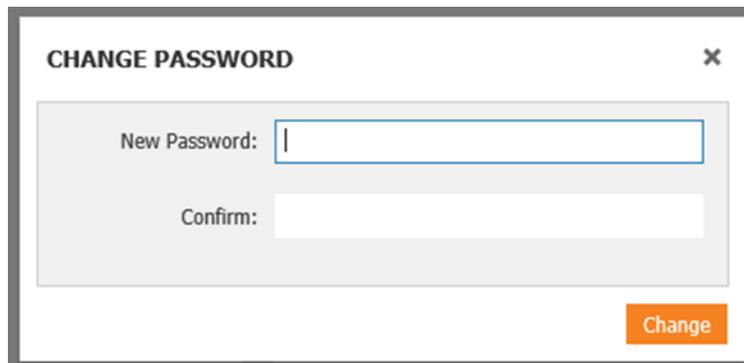
1. Leave Organization blank. Enter your Username. Usernames are not case sensitive.
2. Enter your password. Passwords are case sensitive.*
3. Click Login.

You must change your password every 90 days. DocuWare will remind you two weeks prior to that date.



*As a first time user select ">Forgot your password?" to change the setup password.

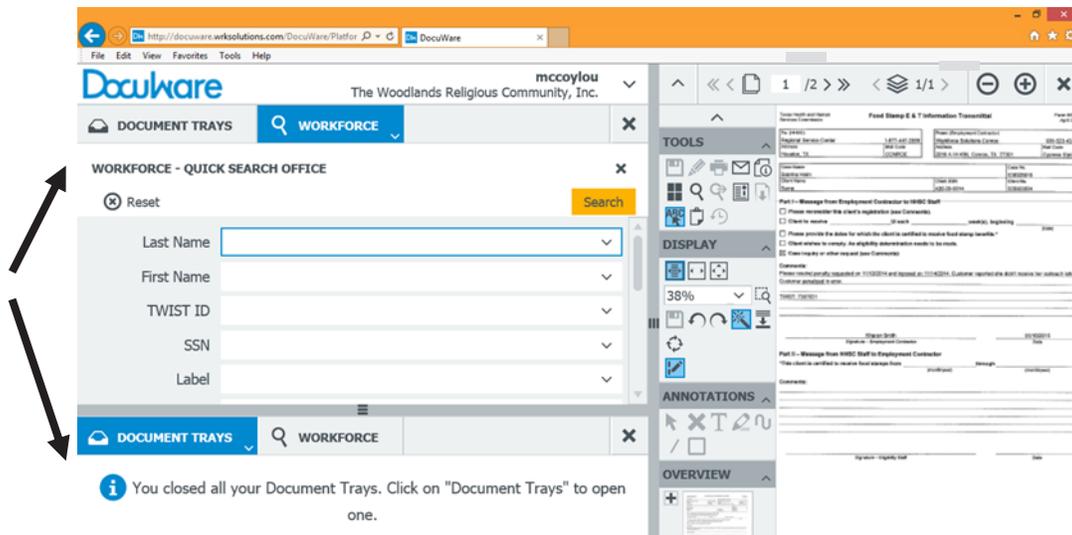
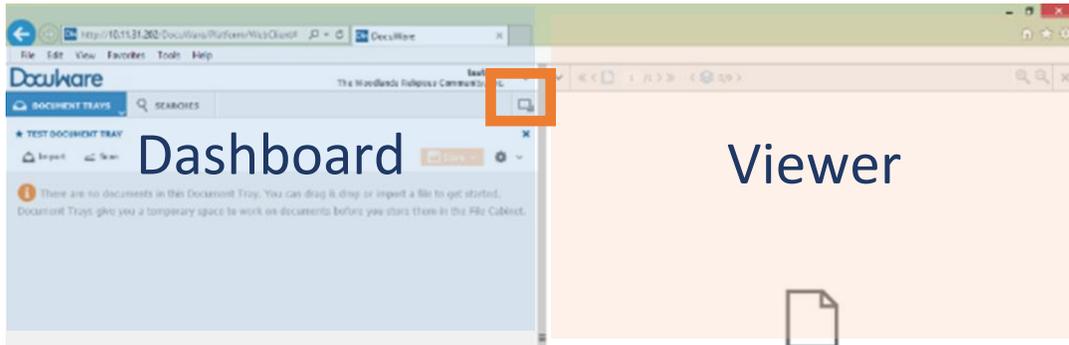
1. Enter your Username.
2. Click Send. DocuWare will send an email link to your wrksolutions email address.
3. Click the link. You will be redirected to a Change Password page.



The image shows a 'CHANGE PASSWORD' dialog box with a close button (X) in the top right corner. Inside the dialog, there are two input fields: 'New Password:' and 'Confirm:'. The 'New Password:' field has a blue border and a cursor. Below it is the 'Confirm:' field. At the bottom right of the dialog is an orange button labeled 'Change'.

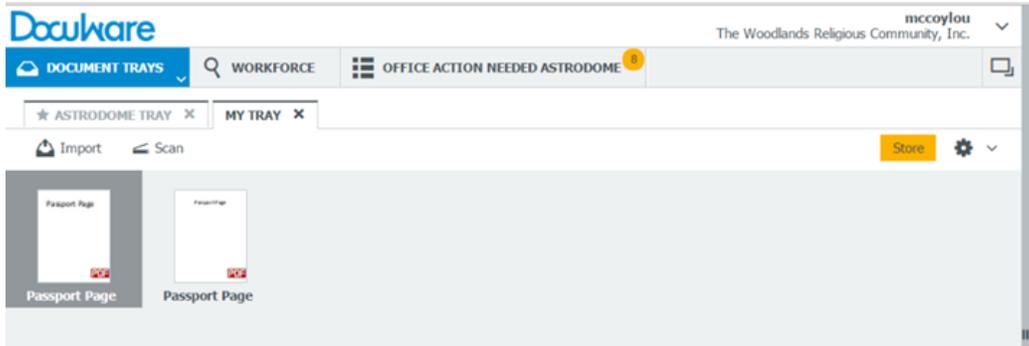
Your password must be at least six characters long and must contain at least one upper case letter, one lower case letter, and one number. Once your password is changed you'll be prompted to log-on. Enter your Username and Password. Your DocuWare workspace displays. The workspace is unique based on the permissions assigned to you.

You can duplicate your Dashboard by clicking on the Show Split Pane icon at the top right of the Dashboard. This helps when you are storing documents.

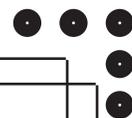


The Dashboard

Use the Dashboard to store documents, search for records, and view the Office Action Needed List. The tabs at the top of the screen expand, based on your user permissions.



- **Document Trays Tab** – Before a document can be stored it must be scanned, dragged, or imported to a Document Tray. All scanned documents enter DocuWare in Office Tray, while files from a computer can be imported or dragged and dropped into either the Office Tray or 'My Tray'. From here documents are stored and indexed. A document is not accessible to all staff until it is stored. Managers and supervisors also have a Confidential tray. All personal staff documents must be scanned, dragged, or imported into the Confidential tray.
- **Workforce Tab** – The Workforce tab accesses the Workforce File Cabinet and opens your search options. You can perform a search using up to 14 indexes including Name, SSN, and TWIST ID. A document is not in the Workforce File Cabinet or accessible to all staff until it is stored.
- **Office Action Needed List** – A list of documents which need the attention of office staff before the Tracking Unit or FASC can take action.
- **Settings** – Change the way you view documents on your Dashboard by clicking on the Settings icon. Click on the arrow next to your name to set up your default settings and to log out.



The Viewer

When you double click on a document on your Dashboard it displays in the Viewer.

1. Displays the number of pages in the document and the page you are currently on.
2. Displays the number of documents in the List on your Dashboard and the document number of the one you are viewing.
3. Displays the document name. Documents scanned into DocuWare are given a DocuWare number, shown here, and those imported from a computer retain the name of the document as it is stored on the computer.
4. This tool allows you to split the document in two pieces at the current page.
5. This arrow shows and hides the tool bar.
6. Displays tools available to manipulate the document. Tools to note:
 - a. Edit Index Entries allows you to change the indexes once the document has been stored
 - b. One Click Indexing lets you select text on the document while open in the Viewer to populate index fields when storing the document.
7. Use Display tools to improve the quality of the document.
8. Annotations: DO NOT USE.
9. Overview displays a thumbnail of the first page of the document. If multiple documents are clipped together the first page of each document will display.
10. Links to other documents. For example, click on the TWIST ID link to conduct an automatic search in the Workforce File Cabinet for all documents with the same TWIST ID.

Workforce Solutions Financial Aid: A Blended Learning Course

The screenshot shows a web browser window displaying a financial aid form. The browser address bar shows 'atform/WebClient'. The page title is 'doc05102820150320085056'. The interface includes a left sidebar with 'TOOLS', 'DISPLAY', 'ANNOTATIONS', 'OVERVIEW', and 'LINKS' sections. The main content area contains several tables and form sections:

- 1:** Browser window title bar.
- 2:** Browser address bar.
- 3:** Browser tab title.
- 4:** Browser window control buttons (minimize, maximize, close).
- 5:** Document navigation icons (back, forward, search, etc.).
- 6:** TOOLS sidebar section.
- 7:** DISPLAY sidebar section.
- 8:** ANNOTATIONS sidebar section.
- 9:** OVERVIEW sidebar section.
- 10:** LINKS sidebar section.

The main form content includes:

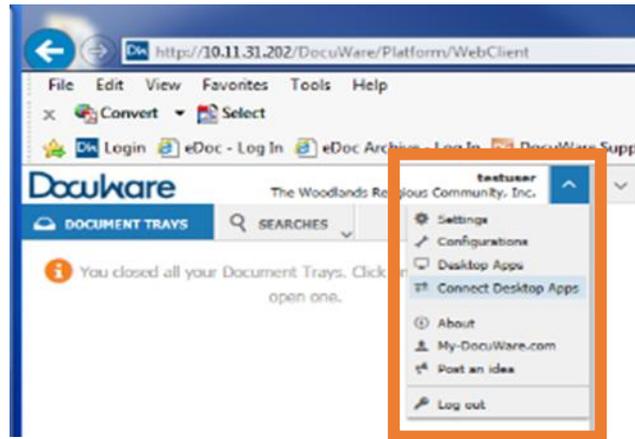
- 6. Holiday and Break Schedule:** A table with columns for 'Training Break(s)', 'Starting Date', and 'Ending Date'.
- 7. Books, Tools, Supplies, etc.:** A table with columns for 'Semester', 'Books', 'Tools', 'Supplies', 'Test/License Fees', and 'Other (Specify)'. It lists costs for Semesters I through VI.
- 8. Estimated Cost of Training:** A table with columns for 'TAA Institution 1', 'TAA Institution 2', 'Other Funding', and 'Specify Other Funding Sources'. It lists costs for Tuition, Fees, Books, Tools, Supplies, etc., Transportation/Subsistence Costs, and Total Costs.
- 9. Training Justification:** A list of six questions with 'Yes' and 'No' checkboxes.
- Additional Considerations:** A list of three additional questions with 'Yes' and 'No' checkboxes.

The footer of the page shows the document name 'doc05102820150320085056_1', the format 'pdf', the date '03/20/2015', and the size '671 KB'.

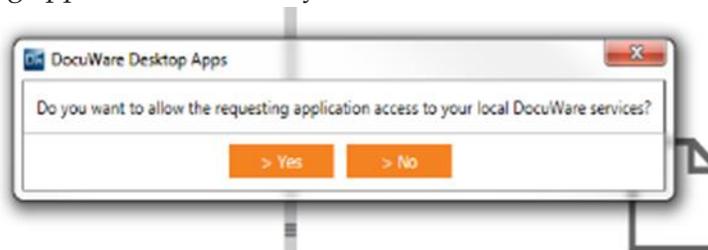
Connect DocuWare Desktop Applications

DocuWare provides additional applications (apps) for download that allow actions such as dragging documents directly into DocuWare, using Windows Explorer to manage documents, and importing files directly from network scanners. While the apps are not required to use DocuWare, they make some tasks easier and more efficient. The apps must be downloaded to your computer by your contractor IT department. The first time you log into DocuWare after the apps are installed, you must connect to the apps to use them. If you use multiple computers, repeat the process for each computer you use.

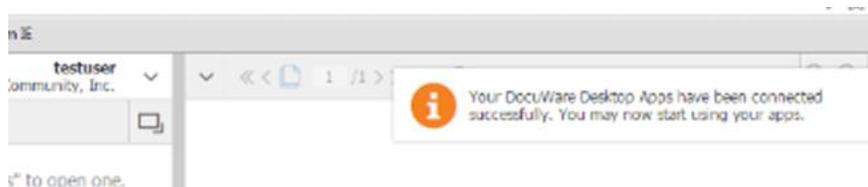
1. Click on the arrow to the right of your user name. A dropdown menu displays.

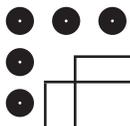


2. Select Connect Desktop Apps from the dropdown menu.
3. A pop-up window displays with the message: Do you want to allow the requesting application access to your local DocuWare services?

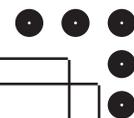


4. Select Yes. A pop-up displays acknowledging your successful connection.





NOTES



ENTER DOCUMENTS INTO DOCUWARE

You are ready to begin using DocuWare.

Documents can be entered into DocuWare several ways. The method you use depends on your preference and the method available for a particular document or user:

- Scan from your office scanner
- Import from your computer
- Drag from your computer and drop into the Document Tray
- Managers and supervisors can also scan, import, or drag a document into the Confidential tray.

Scan

The scanner in your office is set up with a selection to scan documents directly into the office document tray in DocuWare. While each scanner is unique, use the following steps as a guide to scan documents into DocuWare. Remember, scanning only puts the documents into the document tray. You must store the document from your computer for it to be accessible by anyone else.

1. Begin by putting the document into the document feeder or on the glass.
2. From the home screen on the scanner, select the designated DocuWare option.
3. Select the type of document you are scanning:
 - a. Select Confidential if you are a manager or supervisor scanning documents for internal applicants or their family members.
 - b. Select DocuWare for any other documents.

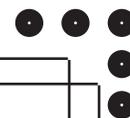
Documents can be one page or multiple pages. The documents go directly into the DocuWare system in a portable document format (.pdf) to the DocuWare Office Document Tray assigned to the scanner used. Confidential documents are sent to the Confidential Office Tray, which only managers and supervisors can view. When scanning documents, remember:

- When you scan multiple documents together, DocuWare handles them as one stapled packet.

- A Financial Aid Application and all supporting documentation is considered one document.
- Cash Sub requests should always be stored separately from other documents unrelated to the cash sub or check request.
- Scan a customer's medical documents separately and Label them Medical, which allows only designated staff to view the documents.
- Managers and Supervisors scan confidential documents, staff or staff family member documents, as separate documents using the Confidential button on the scanner.

IMPORTANT NOTE:

If you have any problems connecting to the system, connecting to your Desktop Apps, or ideas on ways the system could work better for you, please contact your IT department.



Drag and Drop

Set up

DocuWare accepts most common file types such as a Word document, Excel spreadsheet, TWIST letter, picture, or other common types; however, documents manipulated in Microsoft OneNote must be converted to PDF format before dragging them into DocuWare. When you receive an electronic document from a customer, or create one from TWIST, save it to your computer first; then drag it into DocuWare. To work with documents not scanned into the system, set up a DocuWare Working Folder on your desktop to streamline the process.

Set up a DocuWare Working folder on your desktop:

1. Right click on your desktop and select New>Folder.
2. Rename the folder DocuWare Working Folder.
3. Press Enter on your keyboard. Your new folder displays on your computer desktop.



Move files here when you receive them so you can convert them to .pdf when needed and drag them into DocuWare.

Set the default location for downloaded items to your DocuWare Working folder:

1. From your Internet browser select Tools from the menu bar.
2. Click on View Downloads. The View Downloads pop-up window displays.
3. Click on the Options link on the bottom left. The Download options pop-up displays. Change the Default location by clicking on the Browse button and navigating to your DocuWare Working folder on you desktop.
4. Click Ok.
5. Click Close.

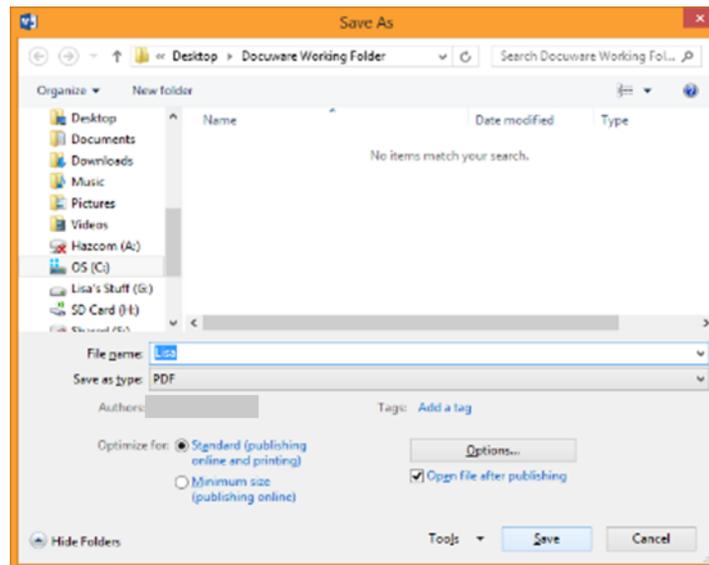
Set Adobe PDF as your default printer:

1. Click on the Windows Start icon on the bottom left of your computer.
2. Select Control Panel and click on Devices and Printers
3. Right click on the icon for Adobe PDF and select Set as default printer.

Convert Microsoft Office files to Adobe files:

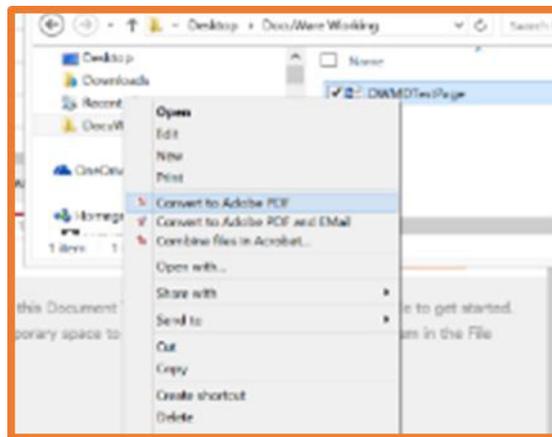
If you do **not** have Adobe Acrobat Pro on your computer,

1. Save the original document to your DocuWare Working Folder.
2. Open the file to convert and select "Save As" from the menu option.
3. Select your DocuWare Working Folder by double clicking on it.
4. Name the document and select "PDF" as the Save as File Type.
5. Save.



If you have Adobe Acrobat Pro on your computer,

1. Save the original document to your DocuWare Working Folder.
2. Right click the document and select “Convert to Adobe PDF.”
3. Select your DocuWare Working Folder as the Save As location.
4. Rename the file as needed.
5. Save.



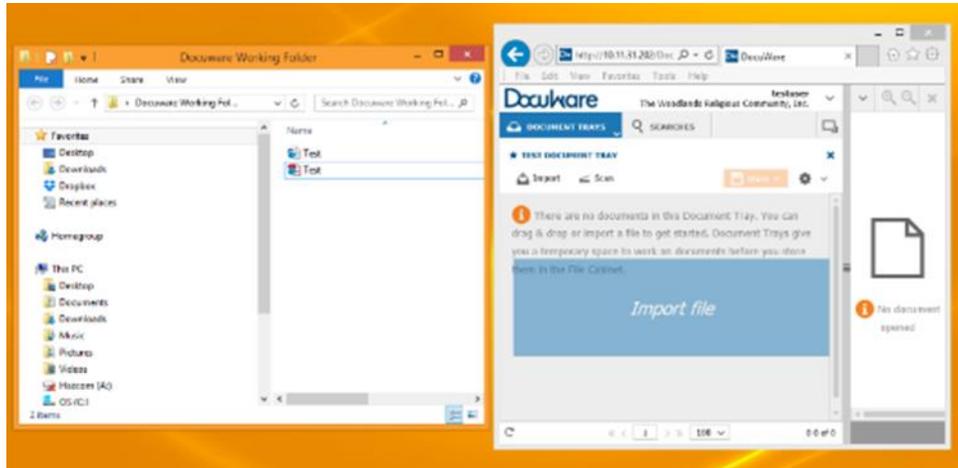
A document can be dragged and dropped into the DocuWare Document Tray. You have access to Document Trays based on your permissions. Career Office staff have access to one shared Tray for the office. Career Office managers and supervisors have access to two Trays -- the Office Tray and a Confidential Tray. Every Customer Tracking Specialist (Tracker) and FASC staff has an individual Tray called, “My Tray” used to manipulate documents for specific applications and files they are working. There are also additional Trays set up to assist with FASC and Tracking Unit workflow.

IMPORTANT NOTE:

Financial aid applications and supporting documentation for Workforce Solutions staff and their family members should be scanned and stored into the office Confidential tray in DocuWare by an office manager, only.

To drag a document into a DocuWare Tray:

1. Open DocuWare.
2. Navigate to the file you want to move to DocuWare in Windows Explorer.



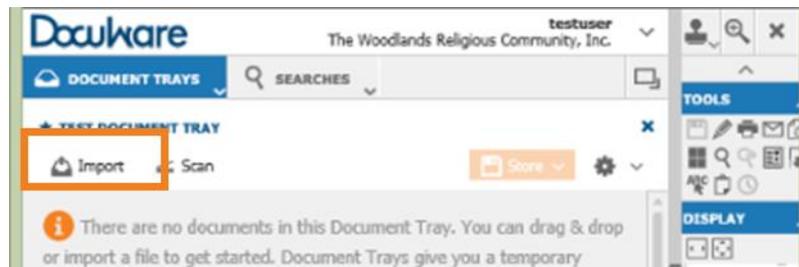
3. Click on the file to import. Remember, the file must be in a PDF format to drag into DocuWare.
4. While holding your left mouse button, drag the file to the DocuWare Document Tray until "Import File in the Tray" appears; then release the mouse button.
5. DocuWare imports the file and displays it in the Document Tray for your office.

Import

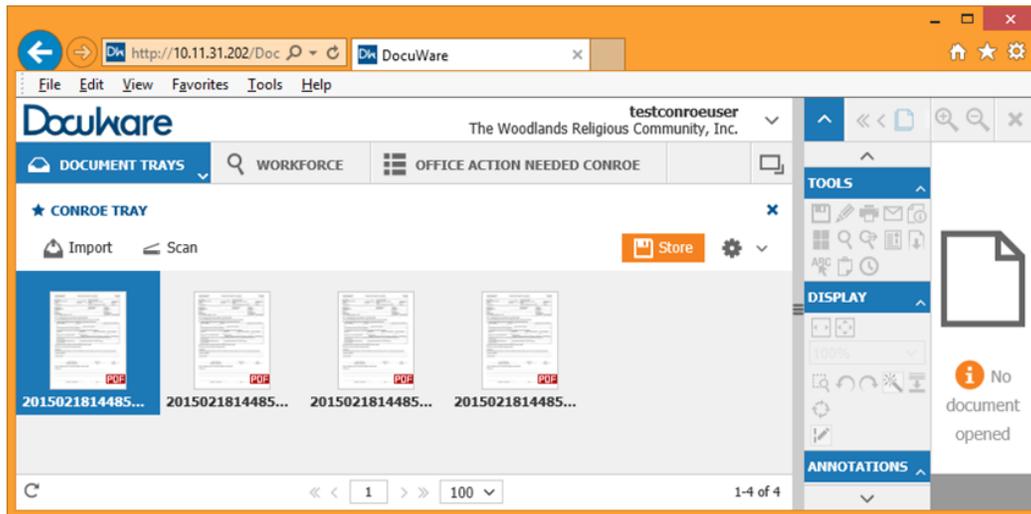
To import files from your computer to DocuWare while in DocuWare:

From your DocuWare Dashboard,

1. Select the Document Tray to which you wish to import the file by clicking on the Document Tray dropdown at the top left of your screen. The Document Tray displays.



2. Click Import on the top left of the screen. Windows Explorer opens.
3. Select the file to upload and click Open, or double click on the document. The document uploads to the system and appears in the Document Tray.

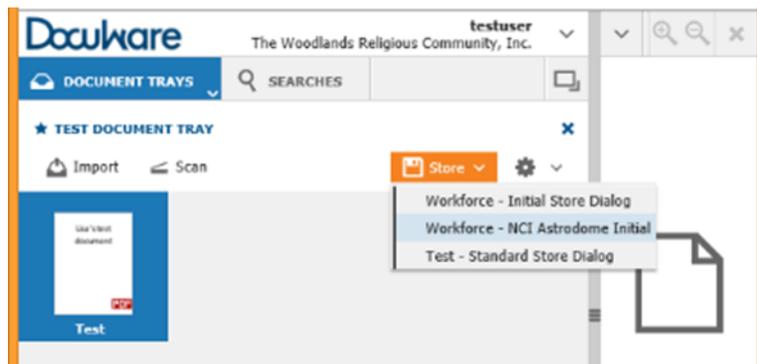


To view documents in DocuWare, simply double click on the thumbnail or record line of the document to open it in the Viewer. You can also right click the line and select Open in New Viewer Window to open an additional Viewer with the document displayed.

Store Documents

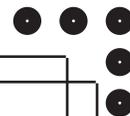
Now that you have documents in DocuWare, you must store them in the DocuWare File Cabinet with the appropriate identifiers or indexes. These identifiers allow anyone to locate the files in the system and they help organize the workflow for the Career Office, the FASC, FAPO, and the Tracking Units. Once files are stored they cannot be removed and can only be stamped "Deleted" by FASC or Tracking Unit staff.

1. With the document highlighted, click on the Store button. A dropdown list displays your storage options. Managers and supervisors have the option to store a document as Confidential.



2. Select the appropriate option by clicking on it. The index screen for the File Cabinet displays. If the document was scanned from an NCI customer scanner the index shown below left displays. If a document is entered any other way the index shown below right, displays.

A screenshot of the 'Storing into file cabinet "Workforce"' dialog box in DocuWare. The dialog has a 'Cancel' button, a 'Reset' button, and a 'Store' button. It contains several input fields: 'Last Name *', 'First Name *', 'TWIST ID', 'SSN', 'Label *', 'Location *' (with 'Call Center' selected), and 'Scanned Location' (with 'Astrodome' selected and circled in red). There is also an 'Office Note' field.A screenshot of the 'Storing "Test" into file cabinet "Workforce"' dialog box in DocuWare. The dialog has a 'Cancel' button, a 'Reset' button, and a 'Store' button. It contains several input fields: 'Last Name', 'First Name', 'TWIST ID', 'SSN', 'Label', and 'Location' (with 'Astrodome' selected).



3. Complete all fields.
 - a. Last Name and First name are required.
 - b. TWIST ID is required appropriate for the customer.
 - c. SSN is optional, but complete it if you have it. Enter without dashes.
 - d. Label is required. See important note about Labels below.
 - e. Location auto populates based on your permissions.
 - f. Scanned Location auto populates with the office location when a document is scanned from an NCI career office.
 - g. Office Note is for use by Career Office Staff only.
4. Click Store. The document saves in the File Cabinet.

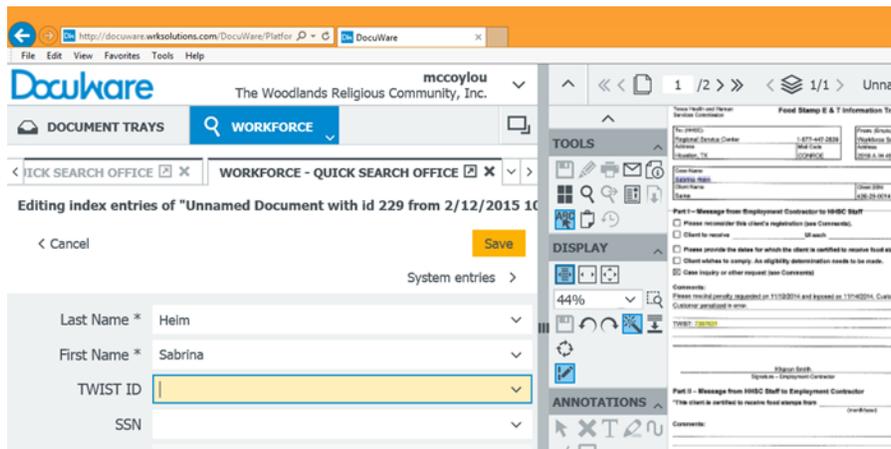
A NOTE ABOUT LABELS:

The Label assigned alerts FASC or Tracking staff of the document in the system. If the Label is incorrect, the process for approving an application or recording information may be delayed or the document may be missed altogether. Refer to the Appendix for a list of document Labels and an explanation of when to use each. If you make a mistake before saving, remove the Label by clicking on the "X" in the Label field and selecting the correct Label. You cannot change a Label once it has been stored.

One Click Indexing allows you to complete index fields by clicking on text on the document in the Viewer.

1. Before you select Store, open the document in your Viewer.
2. Click on the One Click Indexing icon on the tool bar.
3. Move your cursor to the text in the document where you want to populate the field highlighted on the Index, and click. The information populates the field.

Note: Since the SSN field in DocuWare has only nine characters, a SSN with dashes will not fit the field.



The screenshot displays the DocuWare web interface. At the top, the browser address bar shows the URL <http://docuware.wksolutions.com/DocuWare/Platform/DocuWare>. The user is logged in as 'mccoyleou' for 'The Woodlands Religious Community, Inc.'. The main navigation area includes 'DOCUMENT TRAYS' and a search bar for 'WORKFORCE'. Below this, there are search filters for 'CLICK SEARCH OFFICE' and 'WORKFORCE - QUICK SEARCH OFFICE'. The central part of the screen shows the 'Editing index entries of "Unnamed Document with id 229 from 2/12/2015 10' dialog box. This dialog box contains the following fields:

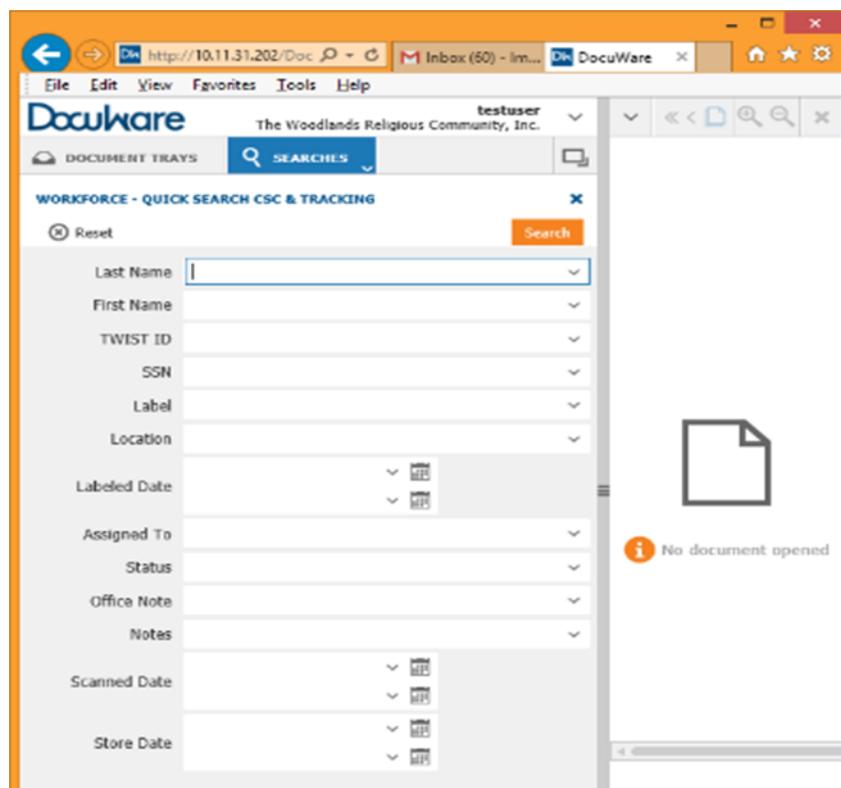
- Last Name * Helm
- First Name * Sabrina
- TWIST ID (highlighted in yellow)
- SSN

Buttons for '< Cancel' and 'Save' are visible. The background shows a document viewer with a 'Tools' sidebar containing various icons for document manipulation. The document content includes a header 'Food Stamp # & T Information Tr' and a body of text with a signature line.

LOCATE CUSTOMER RECORDS

Use the Search tab in DocuWare to locate customer records. DocuWare stores records with up to fifty key indexes which allow you to broaden or narrow your search results. There are two methods to search -- Quick Search and Advanced Search. Quick Searches are set up for different permissions with specific fields available to search. Only staff with certain permissions have access to Advanced Search.

1. Begin your search by clicking on the Searches tab at the top of the screen. The Search screen displays your default search. Click on the Searches dropdown option to choose from the list of your most recent searches.

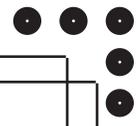


2. Enter the search criteria you wish to use. You can search using one or multiple indexes. You can search last name and first name with partial information. Other search criteria must be entered completely and accurately. Use an asterisk (*) to indicate missing characters when using search criteria other than name.

3. Double click the line to display the document in your document Viewer on the right side of your screen. You can also right click and choose Open in Viewer. The document displays in the Viewer. Use the arrows on the top left of the Viewer to scroll through the document pages. Use the scroll slider on the bottom of the search window to scroll through the indexes for the search results.
4. To open the document in a new window, right click and choose Open in a New Viewer Window.

The screenshot displays the DocuWare web interface. On the left, a search results table is visible with columns for TYPE, LAST NAME, FIRST NAME, and TWIST ID. The table contains several rows of data, with the row for 'TWIST ID: 118121' selected. On the right, a document preview window is open, displaying a 'Trade Adjustment Assistance Reemployment and Training Plan' form. The form includes sections for Customer and Organization, Applicant Information, and Training Information. The document is marked as 'Approved' and 'Signed'.

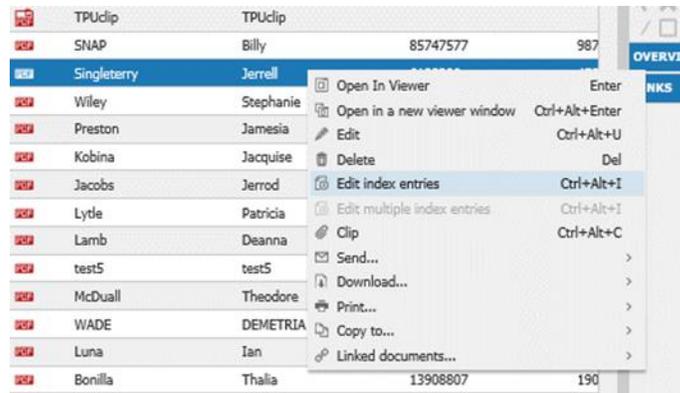
TYPE	LAST NAME	FIRST NAME	TWIST ID
100	TWIST	TWIST	814521
100	TWIST	TWIST	814521
100	TWIST	TWIST	118121
100	TWIST	TWIST	814521
100	TWIST	TWIST	814521
100	TWIST	TWIST	122106
100	TWIST	TWIST	123456
100	TWIST	TWIST	123456
100	TWIST	TWIST	123456



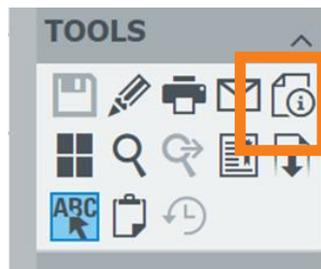
EDIT INDEXES

When you store a document you add information to identify which customer it belongs to and how it should go into the workflow, i.e. is it a new financial aid application for a scholarship or is it a missing document for a customer to continue receiving child care. Occasionally, something will be entered incorrectly or need to be redirected. You can edit the indexes for documents saved in the file cabinet, based on your permissions. Most staff can only edit the First Name, Last Name, TWIST, Social Security Number, and Office Note fields so check with your supervisor if something needs to change which you don't have access to.

1. Select the document to change by clicking on the line.
2. Right click your mouse.
3. Select Edit index entries.
4. Make changes to the fields, as necessary.



If you have the document open in your Viewer, click on the Tool icon Show Index Entries.



IMPORTANT NOTE:

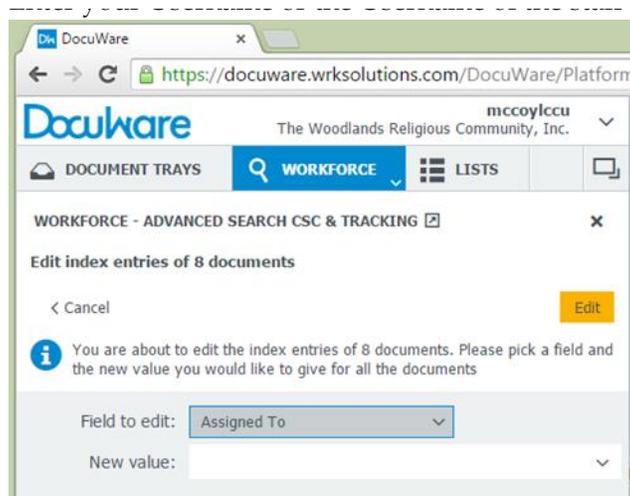
If you discover a customer with multiple TWIST IDs, take the proper steps to have the records merged and notify the FASC or Tracking Unit of the duplication.

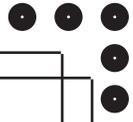
You can use the Edit index entries to assign multiple files to yourself or other staff.

1. Select the document or documents to assign by clicking on the line, or holding the CTRL or Shift key on your keyboard and clicking on multiple lines.

Note: Hold the CTRL key to select non-adjacent lines and hold the Shift key to select adjacent lines.

2. Right click your mouse.
3. Select Edit Multiple index entries.
4. Select the Index "Assigned To."
5. Enter your Username or the Username of the staff to assign the documents.



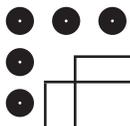


ADD NOTES TO A DOCUMENT

Use the Notes Index to communicate with the Career Office. You can add Notes at any time by editing the index fields. To add Notes after a document is saved:

1. Locate the document to which you want to add notes and click on it to highlight or double click to open in the Viewer.
2. Right click and select Edit Index Fields or click on the Edit Index Entries icon in the Viewer toolbar.
3. Click the Notes field. Add comments.
4. Save.

Do not remove notes. Add notes to the end of the previous note.

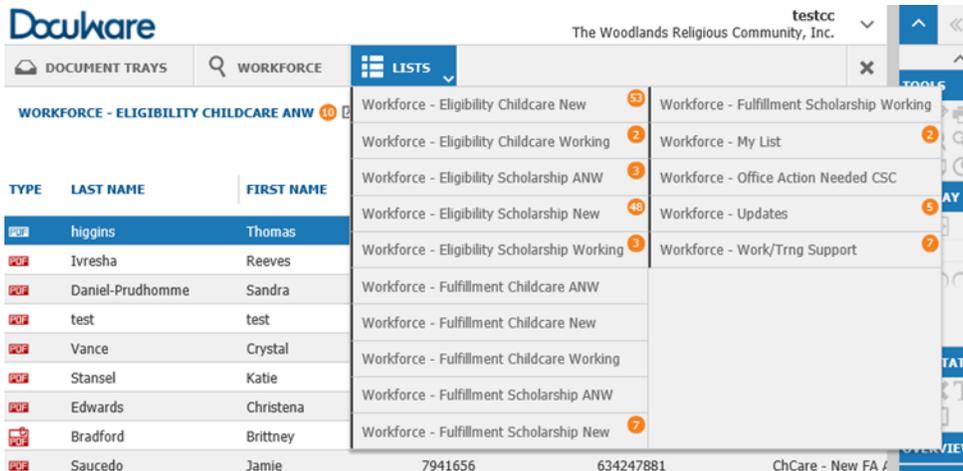


NOTES

LISTS

Lists are used to group documents according to specific Functions or Labels. Lists are defined by the group that will work with the document. Labels and Stamps determine which list a document(s) goes on. There are over forty defined Lists in DocuWare and a “My List” for each FASC and Tracking Unit staff. Users have access to Lists based on their permissions in the system. For example, a Career Office user has access only to the Office Action Needed List. To view Lists:

1. From your home screen click on the Lists tab. If you have a List or Lists open in the search window it will not display on the dropdown.
2. Select the List to view by clicking on it.



- ELIGIBILITY - Displays a list of documents stamped 'Ready' or 'Not Approved', waiting on an initial or redetermination of eligibility.
- MY LIST - Displays a list of documents assigned to you or documents you've stamped "Work".
- NEW - Displays new documents requiring action by the designated team.
- RECEIVING - Displays stored documents which the receiving team staff must review to verify the documentation is present for an eligibility determination to be made. Once reviewed the item is stamped 'Ready' which moves it to the Eligibility list.

- **UPDATES** - Includes items such as updated school schedules, certain OAG information, suspensions, suspension updates, new job, etc. Sometimes there are updates that need to go to eligibility staff and cannot be worked by fulfillment.
- **WORK/TRNG SUPPORT** - The Work/Trng Support List includes cash subs, but is not exclusively cash subs. These documents require immediate attention and must be completed on the same day if FAMS data entry is required for Career Offices to balance their card inventory. Documents on this List will typically be assigned to staff to work to ensure cards are entered and Chase cards are loaded timely.
- **OFFICE ACTION NEEDED CSC** - The Office Action Needed List is a shared List which displays documents previously stamped Office Action Needed by the FASC or Tracking Unit. "Office Action Needed" indicates a document requires action by Career Office staff for the FASC or Tracking Unit to move it through the workflow. When corrections are made, the Career Office staff will enter an Office Note to notify the FASC or Tracking Unit. They will also enter TWIST notes, when applicable. Once the Career Office takes the needed action you must remove it from the List by using a Stamp - "File" to retain the document, or "Delete" if the original document is not needed. This changes the status of the Document.

WORKING IN THE DOCUMENT TRAY

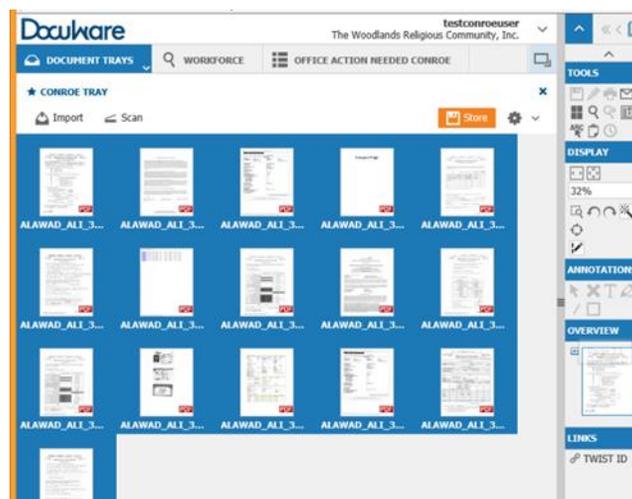
The Document Tray is where documents “land” before they are stored in the File Cabinet. The FASC or Tracking Tray is a public area where scanned documents land before they are stored. Anything in an Office Tray is not visible by staff outside of your office or group (Tracking Unit or FASC). My Tray is a private Tray you can use to manipulate documents without other documents getting in the way. Always clear the Tray by storing documents before moving to your next task.

Combine and Separate Documents

Once documents are in your Document Tray you can manipulate them in a number of ways. Multiple documents (scanned together) enter the Tray as a “Stapled” packet. When .pdf documents/packets need to be separated so they can be stored as individual documents, use the Unstaple/Staple functions or Adobe Pro to separate and put together pages. Only .pdf files can be manipulated using the Unstaple/Staple function.

Unstaple and Split

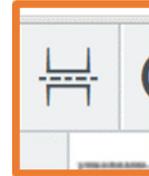
1. Right click on the document in your Tray.
2. Select Unstaple. The pages are separated in the Tray



You can also separate documents using the Split tool. Splitting a document

separates it into two sections at the point the split is made. To split a document:

1. Open the document in the Viewer.
2. Navigate to the page you want to be the first page of the split.
3. Click the Split tool on the top right of the Viewer.
The document splits and displays as two documents in your Tray. The second document will have the same name as the first with (2) after it.
4. Store each document with the appropriate indexes.

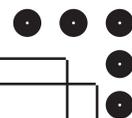


Staple

Stapling documents together creates a single new document which you can store with new indexes. Original indexes are retained in the copied document unless you change them. You can only staple together files in .pdf format.

Use the staple function to connect pages of .pdf documents in your Tray.

1. Click on the page you would like to appear first in the document.
2. Hold down the CTRL button on your keyboard.
3. Continue holding the CTRL button down, and click on subsequent pages in the order they should be in the documents.
4. Release the CTRL button.
5. Right click.
6. Select Staple. The stapled document appears in your Tray.
7. Store the document with the appropriate Indexes.



Staple Two Documents Not Yet Stored

1. In your Document Tray hold down the CTRL key on your keyboard and click on each page in the order you want them to appear.
2. Release the CTRL key.
3. Right click within the highlighted section and select Staple.
4. Double click on the document highlighted to view the pages in the packet.
5. Store the document using the appropriate Labels.

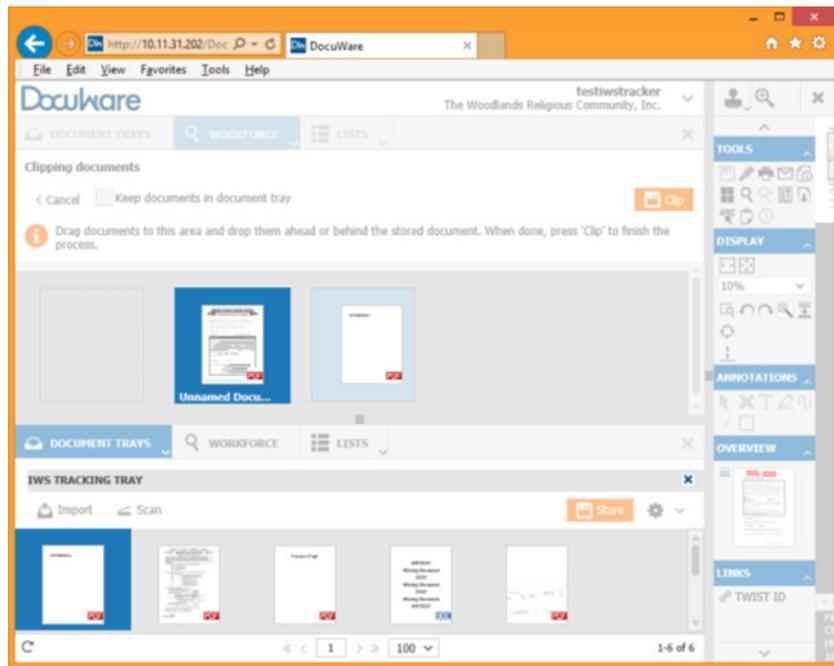
Add a Page to the End of a Document in the Tray

1. Import the page to add into your Tray.
2. Select the document in your Tray you wish to add the page to
3. Hold down the CTRL key on your keyboard and click on the new Page.
4. Release the CTRL key.
5. Right click within the highlighted section and select Staple.
6. Double click on the document highlighted to view the pages in the packet.
7. Store the document using the appropriate Labels.

Join a Document in the Tray With a Stored Document

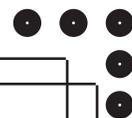
New items received which relate to a customer's application/file should be part of documents already stored in DocuWare. To join the items:

1. With DocuWare in split-pane mode, search for the existing stored document,
2. Left click and drag the new document over the existing document (Works best when top left corner of new document touches line of stored document)
3. Release mouse button. A confirmation pop-up displays.
4. Click Store. The indexes of the stored document are copied to the new item.
5. Verify and/or change appropriate indexes.
6. Click Store. The document will be placed on the appropriate list for processing.



Use Adobe Pro to Manipulate Documents (FASC Only)

FASC staff have Adobe Acrobat Pro software which allows them to take a document out of DocuWare, edit it, and save it back into DocuWare. This



is helpful when financial aid application missing documents are stored in DocuWare and when a document must be rescanned.

Join Two Stored Documents

1. Locate the document for which you do not need to maintain the indexes.
2. Right click, select Download PDF with Annotations. Document will download into your Docuware working folder.
3. Delete the downloaded document from DocuWare. Double click the document to open it. Stamp it Delete with the reason, Duplicate.
4. Locate the document for which you wish to maintain the indexes. Note: Use this method only if the document has a status of Labeled or Denied. Right click and select Edit. The document will open in Adobe Pro.
5. Select thumbnail view and drag the first document into Adobe PRO.
6. Arrange documents in proper order, deleting any unnecessary pages.
7. Select File, Click Save. The manipulated document is returned to DocuWare.
8. Delete the document from your working folder.

Separate Items from a Document

Core documents such as birth certificates, social security cards and other I-9 documentation should be separated from other documents in a customer's financial aid packet and stored in DocuWare for future use. To do this:

1. Select the document in DocuWare.
2. Right click, select Download as PDF without Annotations. The document will download into your DocuWare working folder.
3. Open the document using Adobe PRO and select thumbnail view.
4. Delete any non-core documents.
5. Select File, click Save.
6. Drag the saved document into My Tray in DocuWare.
7. Store with the appropriate indexes, use proper Proof of label.

USING STAMPS TO MANAGE DOCUMENTS

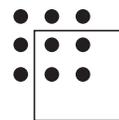
Stamps are used to identify the status of a document in the workflow. All Stamps display the username of the staff who applied the Stamp and a time stamp. Stamps should be applied to the first page of a document in a blank area when possible. Once a Stamp is applied, there is no way to remove it. Each Stamp affects a document differently.

- **APPROVED:** The Eligibility Team has determined the customer as eligible. The Approved stamp moves the document to the List for the Fulfillment Team to work.
- **APPROVED-FILE:** Indicates the Eligibility Team has determined the customer as eligible but the file doesn't need to be fulfilled. For example a Financial Aid application for scholarship when the Cost Obligation form has not been received or when school begins later.
- **CONFIDENTIAL:** Moves a document to the Confidential area in DocuWare. It puts the document on a List only staff with management permissions can view.
- **DENY:** Indicates the Eligibility Team has determined the customer ineligible. Staff will be prompted to choose the reason the application is denied. Choose one of the options from the dropdown, or type in your own reason.
- **DELETE:** Designates document that need to be removed from DocuWare, i.e. duplicates, unneeded documents. Stamping a document with the Delete Stamp doesn't actually delete the file, it removes it from basic searches. When this Stamp is used you must provide a reason for deleting the document before you can Stamp.
- **FILE:** Indicates tasks related to a document have been completed and the document is ready to be filed. Documents stamped "File" do not move to another List. For example: a cash sub has been entered in FAMS and TWIST.
- **FULFILL:** When an application has been completed by the fulfilment team the document is stamped "Fulfill" to establish a completion of the process. When a document is stamped "Fulfill" is it filed.
- **MOVE:** Use Move when a document needs to move to a different List, but needs to retain its original Label.

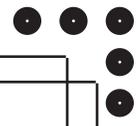
- **NOT APPROVED:** Used by the Fulfillment team to indicate an approved document needs to have the calculations used to make an eligibility determination reviewed for accuracy. Using this stamp returns the document to the list of the staff who stamped the document Approved.
- **NOT READY:** Used when a document makes it to the Eligibility team but does not have all the documentation needed to make an eligibility determination. Using this stamp begins the denial process for the application and returns it to the Receiving team to review, attempt to retrieve missing documents, or deny the application.
- **OFFICE ACTION NEEDED:** Used when Career Office staff must take action or provide more information for a document to be processed, i.e. signature needed, missing pages for cash subs or Job Search Logs. This Stamp moves the document to the Office Action Needed List. Marking a document “Office Action Needed” is a two part process:
 1. Stamp the document “Office Action Needed.”
 2. Edit Index Entries to add Notes telling the Career Office what needs to be done.

Using this stamp requires a follow up action on your part once the Career Office has taken the needed action.
- **READY:** The document contains all required forms and documentation for an eligibility determination to be made.
- **RELABEL:** Use the Relabel Stamp when a document is stored with the incorrect Label, for example when an application is labeled for Child Care but should be for Scholarship.
- **WORKING:** Alerts other staff working on the file by changing the status to “Working.”

USING THE FINANCIAL AID COMMUNICATION SYSTEM



NATIONAL WORKFORCE INSTITUTE



INTRODUCTION

The Financial Aid Communication System (FACS) is a web-based software program used to communicate changes and other information about a customer's financial aid application. FACS is used by the Financial Aid Support Center (FASC), FAPO and the Career Offices to:

- Update the progress of a customer's financial aid application,
- Notify the FASC of changes to a customer's financial aid needs or eligibility criteria,
- Notify the Career Office of eligibility approval/denial,
- Notify the Financial Aid Payment Office (FAPO) of child care billing Issues,
- Notify the FASC of a customer's need for a new voucher,
- Request the FASC set up Training Accounts, etc.

Glossary

Communicating in FACS requires an understanding of its unique terminology. Reference the glossary below for explanations of various terms.

Closed Issue - An Issue that has been worked and resolved.

Group - A collection of users or other groups.

Issue - A ticket for action needed to be taken.

Issue Types - Categories of commonly used Issues.

Next Action - Select the user or group who should take action on the Issue. Items are referred to as "Next Actioned" to a person or group.

Open Issue - An Issue that requires an action.

Quick Pick - A shortcut to create a new Issue. It applies predetermined settings that may include, Status, Issue Type, Next Actioned to, Subject, Body Content, etc. Quick Picks should be selected first whenever available to save time and ensure necessary fields are not overlooked.

Saved Search - A function in FACS that allows you to save search criteria you use frequently.

Status - An Issue is either Open and requires an action, or Closed and is complete.

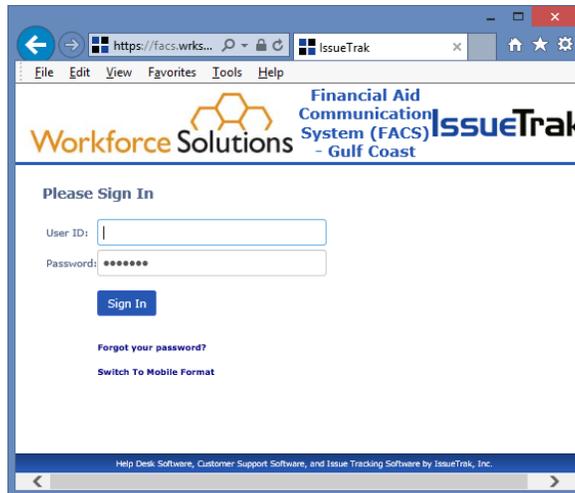
Submitter - The user who creates/submits an Issue.

Substatus - The status of an issue is either Open or Closed. A Status may also have a Substatus which allows you to organize issues into more concise sub-categories within Open and Closed. This helps you quickly identify to what extent issues have been addressed and where they are in the resolution process.

- *Blank*: Automatically set when an issue is closed.
- *Pending*: Automatically set when an issue is entered and the status is initially "open." It also converts to this substatus when the issue is assigned.
- *Working*: Automatically set either when there is an "Add Note" event or a "Next Action" event to a status.
- *On hold*: not currently in use.
- *Response Received*: Automatically set when the event is "Note Added by Submitter."

Log In

To login to the FACS system go to: <https://facs.wrksolutions.com/>. The logon screen displays.

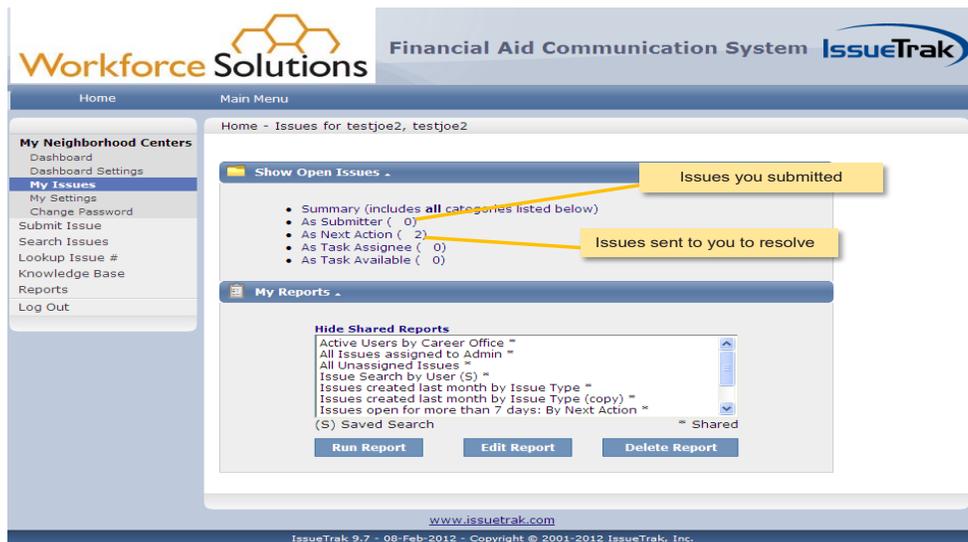


Enter your user ID and password. Passwords are case sensitive, must be a minimum of six characters, and include both letters and numbers. You will be locked out of the system after five failed attempts. If you forget your password, enter your User ID, click the "Forgot your password?" link, and follow the instructions.

Passwords expire every 90 days. You can change your password any time by clicking the "Change Password" link in the left navigation bar.

Home Page

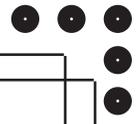
Your FACS home page defaults to the My Issues page. If you prefer, you can contact the system administrator at the Financial Aid Payment Office (FAPO) to set it to the Dashboard. To navigate to this page while logged in, select My Issues or Dashboard from the navigation menu on the left.



Use the left navigation bar to access different pages. Keep track of Issues for which you are responsible for under the “Show Open Issues” section on the My Issues page. The “As Submitter” link displays a list of all Issues you’ve submitted and the “As Next Action” link displays a list of Issues that have been assigned to you, or a group you’re a part of, to resolve.

Important Note: Check the “As Next Action” link frequently so Issues can be resolved timely.

Below the “Show Open Issues” section the My Reports section displays a list of shared reports and available saved searches.



SUBMIT AN ISSUE

Quick Picks

Commonly addressed Issues are set up in FACS as Quick Picks. A Quick Pick is a template that automatically populates information and values for those issues, such as:

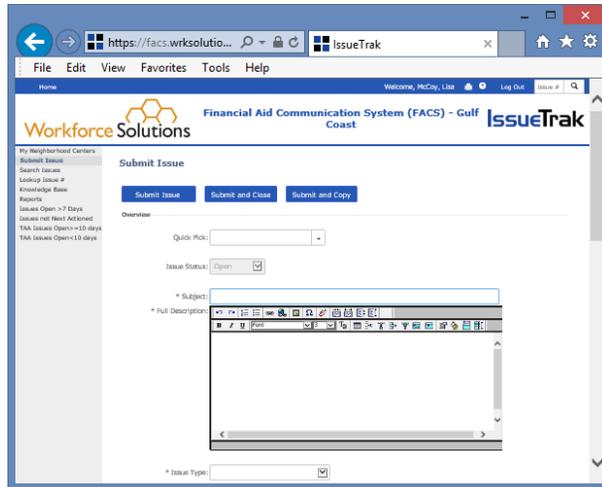
- Subject
- Description
- Issue Type
- Subtype, Priority
- Email Distribution List, etc.

Quick Picks also pre-define the workflows such as Assigned To, Next Action, Tasks, etc.

Use Quick Picks whenever possible. You can still change or add information as you submit a Quick Pick, but the base template helps ensure similar issues have the same or similar values and processes in place regardless of who submits or works it. Quick Picks are also a valuable time-saver, reducing the input and update time required.

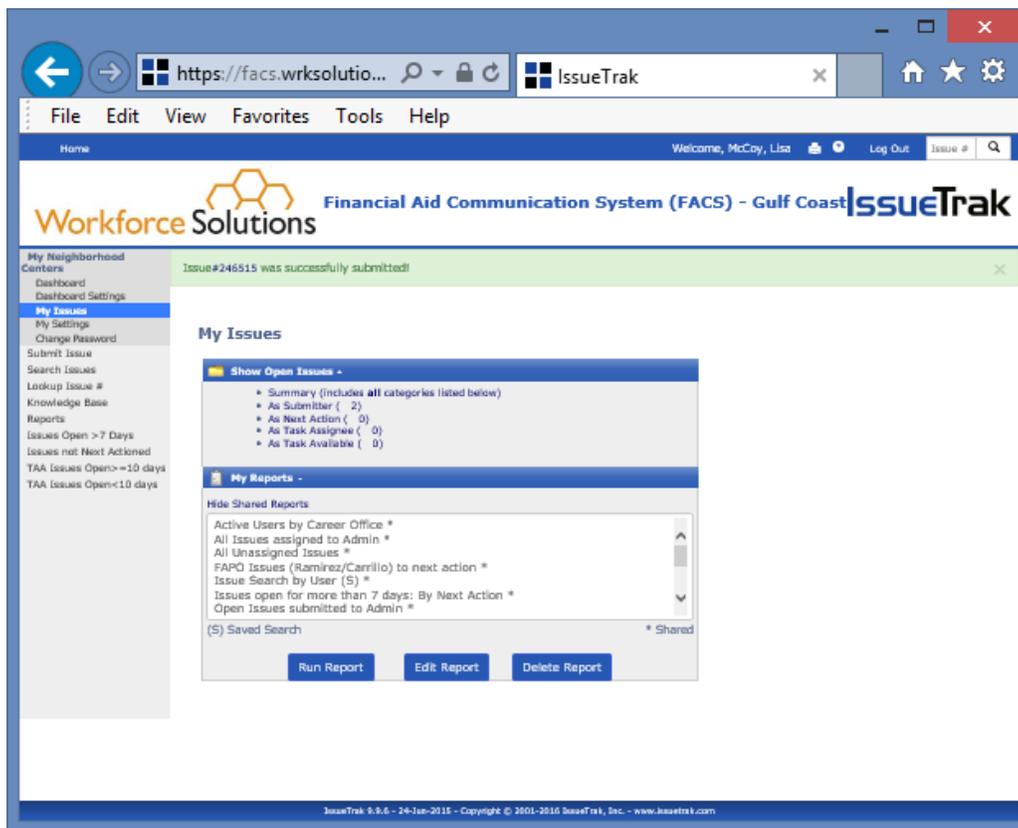
To create a new Issue using a Quick Pick:

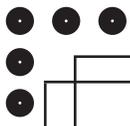
1. Select Submit an Issue from the left navigation bar. The Submit page displays.



2. Select the appropriate action from the Quick Pick dropdown menu. (Refer to the Issue Types chart at the end of this section to select the appropriate Issue Template.)
 - The Subject line automatically populates.
 - The Full Description field populates with prompts for the information required for the Issue.
 - Add the information requested in the Full Description field.
 - The Issue Type automatically populates. Do not change the type.
 - In the Next Action field, select the individual or group responsible for taking the next action on the Issue. Quick Picks are typically assigned to a default group. For example, New Vendor Creation is assigned to the Funds Analysts. Assign the Next Action to a group instead of an individual whenever possible – this ensures the Issue is worked by whoever is available. If the Next Action field is left blank:
 - No one will know who should take action on the Issue, and
 - The issue will sit in limbo, and appear on the “Unassigned/Not Next-Actioned weekly report.
 - Add the Career Office. In the career office field, begin typing the name of the career office, the full name and number will display for you to select. You can also click the magnifying glass to the right of the Career Office field for a pop-up list of all options.
 - Click on the Include Attachments check box if you have documents to submit which support the Issue. You will be asked to select the attachments after the next step.

- Add a New Note to include any additional information that might help the person or group complete the actions needed, if necessary.
 - Complete the fields for:
 - Customer First Name
 - Customer Last Name
 - TWIST ID
3. Click Submit Issue. If Include Attachments is checked you will be prompted to upload the documents. Refer to the Attach Documents to an Issue section below to add attachments. The new issue will be assigned the next available issue number, the My Issues page displays with “Issue (Issue#) was successfully submitted” at the top of the page.





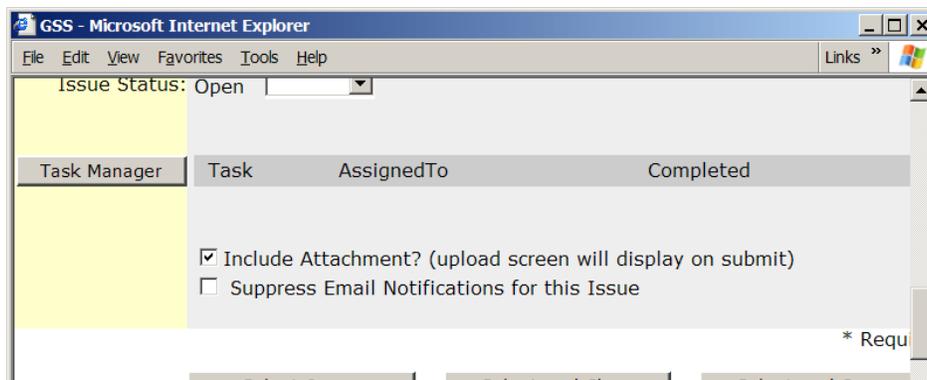
NOTES

ATTACH A DOCUMENT TO AN ISSUE

Documents supporting an Issue may be attached, if needed. Documents must be created and saved before you can attach them to an Issue.

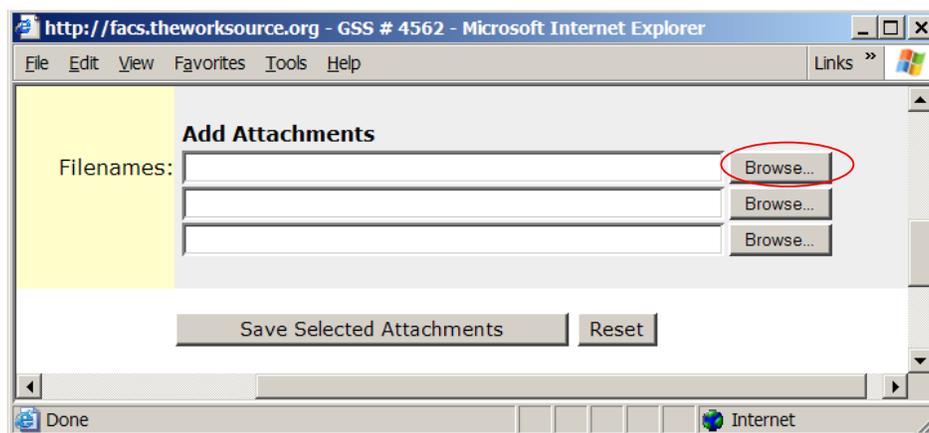
Create the Issue and check the Include Attachment check box.

Click Submit Issue.



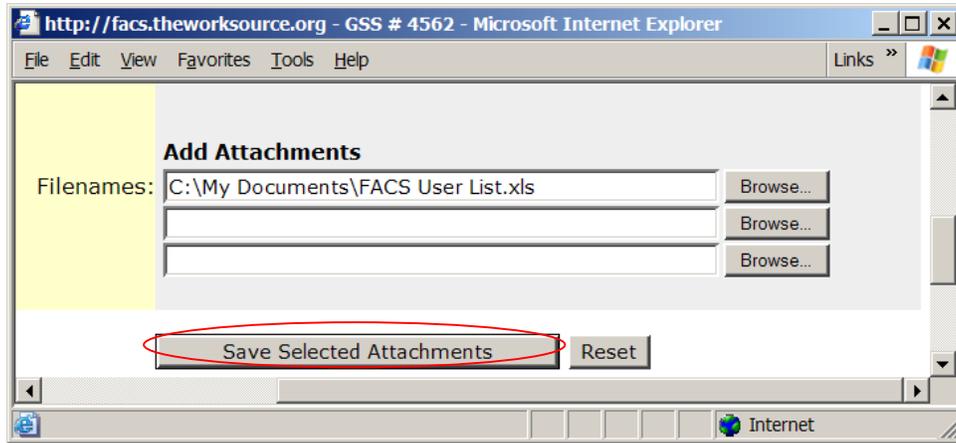
The attachments pop-up displays.

Click the Browse button to the right of the Filename field. Locate the file you wish to attach and click Open.



The Attachments window displays with the path to the document in the Filenames field. Repeat until all documents are selected.

Click on Save Selected Attachments.



SEARCH FOR AN ISSUE

You can search for Issues using a variety of information in the Issue including, but not limited to:

- Issue Status
- Issue Type
- Subject
- Submitted By
- Assigned To
- Next Action
- Dates

To search for a specific Issue or set of Issues:

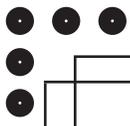
1. From the Home Page, click Search Issues from the left navigation bar. The Search Issues screen displays.

The screenshot shows the 'Search Issues' interface in a web browser. The browser's address bar displays 'https://facs.wrksolutions.com/Issue/'. The page header features the 'Workforce Solutions' logo, the text 'Financial Aid Communication System (FACS) - Gulf Coast', and the 'IssueTrak' logo. A navigation menu on the left includes 'My Neighborhood Centers', 'Submit Issue', 'Search Issues' (highlighted), 'Lookup Issue #', 'Knowledge Base', 'Reports', 'Issues Open > 7 Days', 'Issues not Next Actioned', 'TAA Issues Open >= 10 days', and 'TAA Issues Open < 10 days'. The main content area is titled 'Search Issues' and contains a 'Search' button and a 'Reset' button. Below these are search criteria fields: 'Issue Status' (two dropdown menus), 'Priority' (dropdown), 'Issue Type' (dropdown with a 'Show Inactive Issue Types' checkbox), 'Subtype 1', 'Subtype 2', and 'Subtype 3' (each a dropdown). At the bottom, there are search input fields for 'Search All:', 'Subject:', and 'Notes:', each with a 'keyword search' label.

2. Complete the fields for the Issue(s) you wish to find. For example:
 - Status: Open/Closed.
 - Issue Type: A specific Issue type. See Issue Type List at the end of this section. Note: This field combined with the "Date Opened" field is the most common type of search.
 - Search All: Use this as a keyword search to locate Issues with specific text in the Issue's Subject, Description, Notes, or Solution. Search for Issues related to a specific customer by entering the customer's TWIST ID in the text field.
 - Submitted By: To locate Issues submitted by a particular person.
 - Next Action By: To locate Issues currently Next Actioned to a specific person or group.
 - Organization: To search by contractor.
 - Career Office: To search by office.
 - Date Opened/Closed: To search for Issues created or completed within a specific time frame.
3. Select the Search Output Options: Define how you want to receive the search results.
 - a. Search Title: Name your search. (Choose a name which accurately defines your report.)
 - b. Output: Select the format you want the results to display. Options include Count Only and Detailed Output to Excel.
 - c. Sort Order 1-3: Select the way to have the results organized. For example, you can choose to have results ordered first by Assigned To, then Required by Date, to return a list of Issues for staff responsible and the dates the actions are due.
 - d. Save New Search (Optional): If you wish to have the option to run this search at a later time select the Save New Search button to the right.
 - e. Retrieve Saved Searches: Click this button to run a search previously saved.

- Click Search. The search results displays in the form you identified in step 3b.

Important Note: Fields with the magnifying glass icon to the right of them require a system search to populate the field. Click on the  to select from options for these fields.

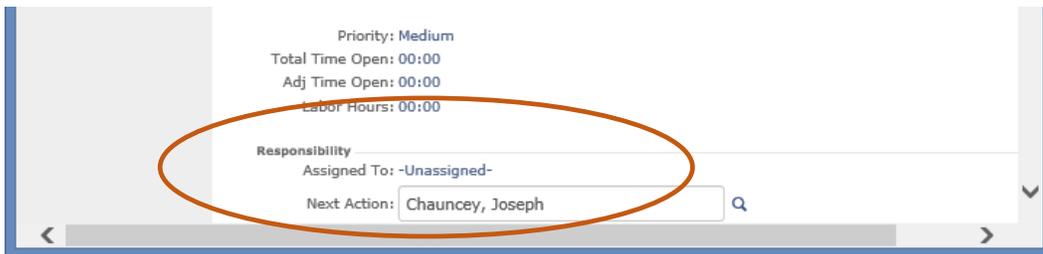


NOTES

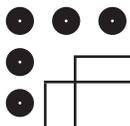
CHANGE NEXT ACTION

Occasionally Issues will be assigned to the wrong person or group. To change to whom an Issue is assigned:

1. With the Issue selected, click on Next Action from the left navigation bar. In the Next Action field, begin typing the name of the person or group, a list of names displays in a dropdown. Make your selection.
2. Click Update.



The screenshot displays a user interface for managing an issue. The issue details shown are: Priority: Medium, Total Time Open: 00:00, Adj Time Open: 00:00, and Labor Hours: 00:00. The 'Responsibility' section includes 'Assigned To: -Unassigned-'. The 'Next Action' field is active, showing a search input with 'Chauncey, Joseph' entered and a magnifying glass icon. A dropdown menu is open below the search input, and the name 'Chauncey, Joseph' is highlighted. The interface also features a left navigation bar and a right sidebar.



NOTES

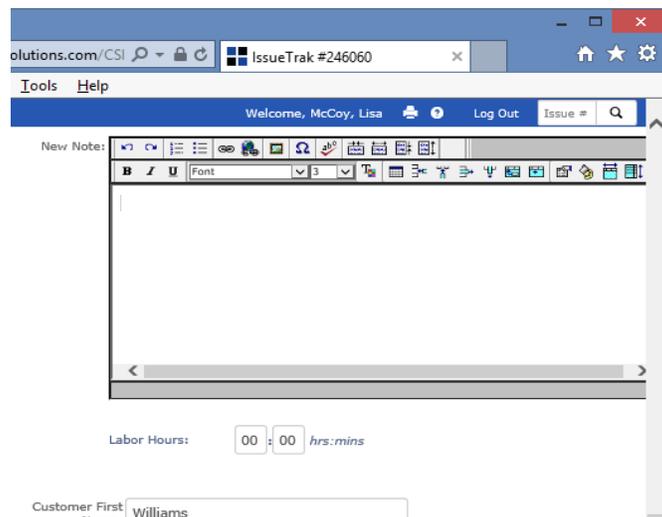
RESOLVING ISSUES

An open Issue requires action on the part of the person to whom it's Next Actioned. Once the resolution has occurred, the responsibility for the Issue returns to the original submitter. Occasionally, some action must happen or question(s) must be answered before an Issue can be resolved. Use FACS to get questions answered, change or add attachments, or get manager approval.

Questions

Use the Issue to ask or answer questions regarding the requested action by adding a note.

1. With the Issue open, click Add Note on the Issue or on the left navigation bar. The New Note field displays.
2. Type in your question or the answer to the question.

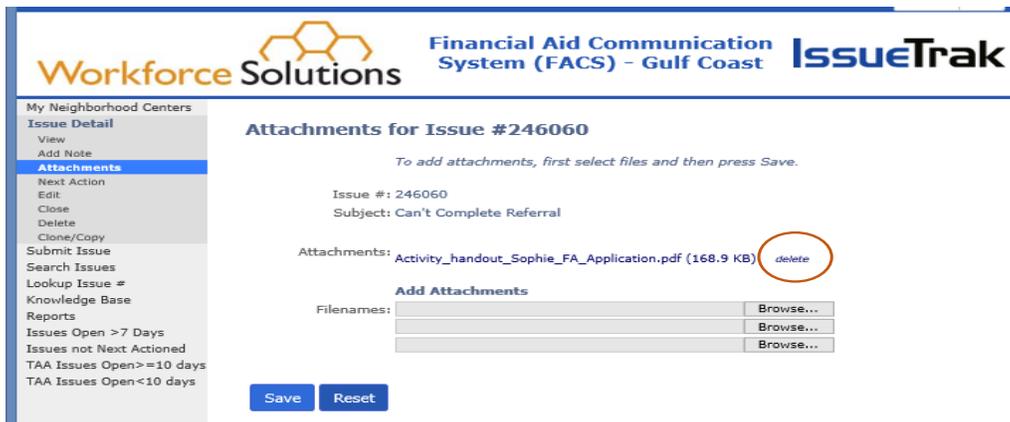


3. Click Add Note at the top or bottom of the page.
4. Send the Issue back to the appropriate staff by changing who is responsible for the Next Action.

Changing an Attachment

To make edits to an attachment on an Issue and/or change an attachment:

1. With the Issue open, click Attachments on the left navigation bar. The Attachments screen displays.



2. Click on the document name to open the attachment. Make the necessary changes and save the document to your computer.
3. Close the document. The FACS Attachment screen displays.
4. Delete the original document from the Issue by clicking Delete to the right of the Attachment field.
5. Add the edited document by clicking Browse and selecting the document from your files. Add additional documents, as necessary.
6. Click Save.
7. Change the person responsible for the Next Action to the appropriate staff.

Request Approval

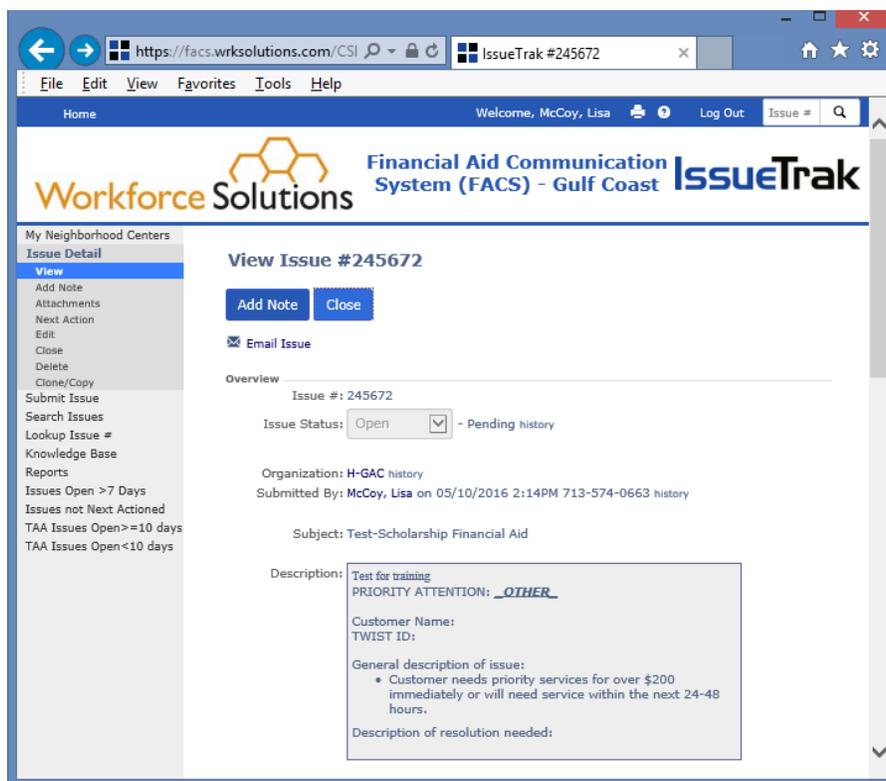
If the person who submitted the Issue does not have authority to request an action, send the Issue to someone who can approve it by changing the person assigned the Next Action.

CLOSE AN ISSUE

Once an Issue has been resolved it may be closed or “Next-Actioned” to the person who initially submitted it to notify them of the resolution(s) and alert them to close the Issue. Check with your supervisor to determine the process for your office. Issues should be closed in a timely manner once resolved. Issues for which a user has been identified as the next person to take action will be displayed on the As Next Actioned link on the home page.

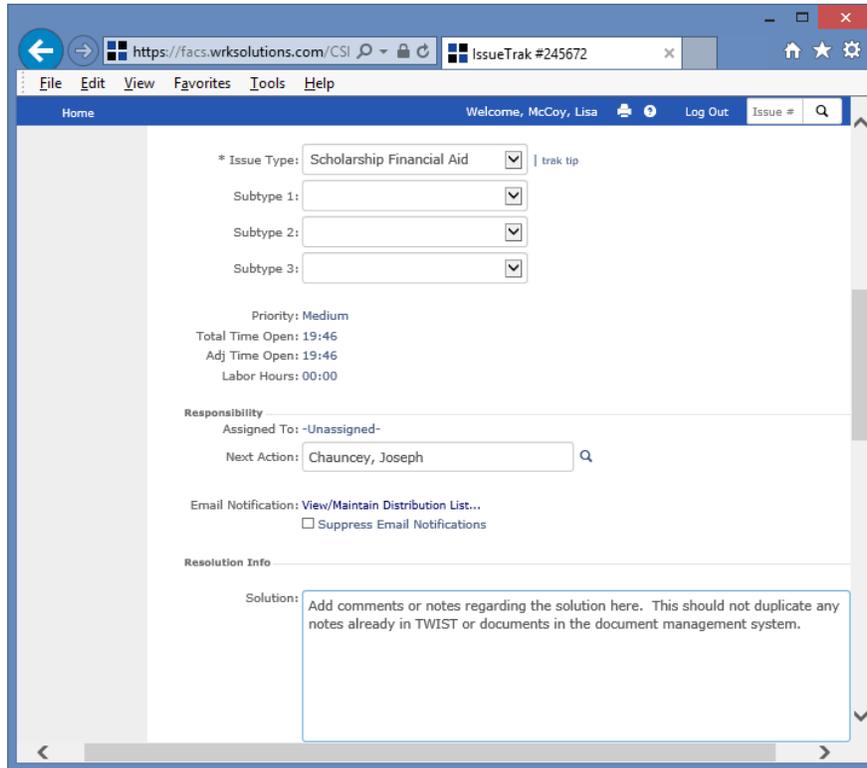
To close an Issue:

1. With the Issue open click on the Close button on the top of the screen or select Close from the left navigation bar.

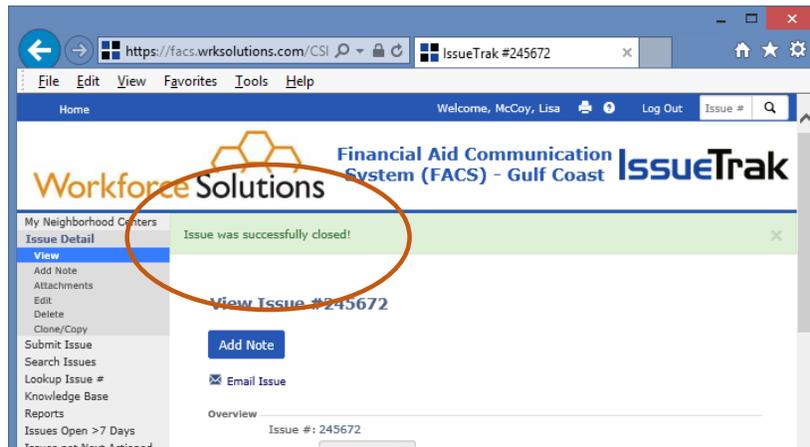


The Solutions field displays. Add notes regarding what you did to resolve the Issue. Don't duplicate notes in TWIST.

2. Scroll to the top or bottom of the screen and click Close Issue.



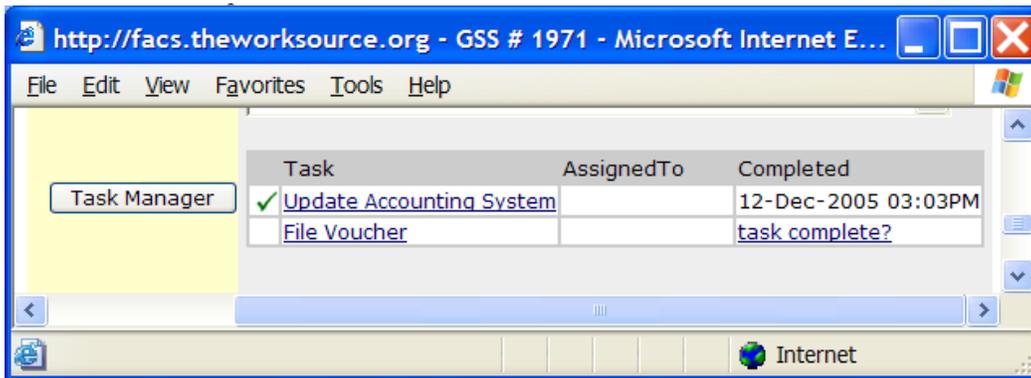
The closed Issue verification displays.



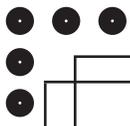
If there are Tasks on the Issue which need to be completed a pop-up message will display.



- a. Click OK. The Close Issue page displays.
- b. In the Task Manager section of the page click the "task complete?" link for all tasks not completed.



- c. Click the Close Issue button.



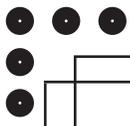
NOTES

REPORTS AND SAVED SEARCHES

The reports relevant to your work will display on your Home/My Issues page. Some of the reports you may use are:

Report Name	Description
Active Users by Career Office*	Active Users by Career Office
All Unassigned Issues *	This report shows all Issues not assigned. They may have been Next Actioned.
Issues created last month by Issue Type*	Shows issues created/submitted in the last calendar month regardless of status ordered by Issue Type.
Issues open for more than 7 days: By Next Action*	Shows “open” issues which have are older than 7 days, sorted by Issue Type, Career Office, and then Subject.
Issue Search by User(s)	Lists Issues by ‘Assigned to’ user.
Sample Open Issues by Issue Type*	Open Issues grouped by Issue Type showing Priority, Issue Number, Subject and Status. It includes a count of Issues by Issue Type value and for the overall report. The details are sorted by Priority in ascending order. This is a shared report.
Sample Open Issues by Priority*	List of open Issues sorted by Priority which displays the Issue Number, Subject, Issue Type and Status. It includes a count of Issues by Priority and for the overall report. The details are sorted by Issue Number in descending order. This is a shared report.

* = Shared



NOTES

Access Saved Searches

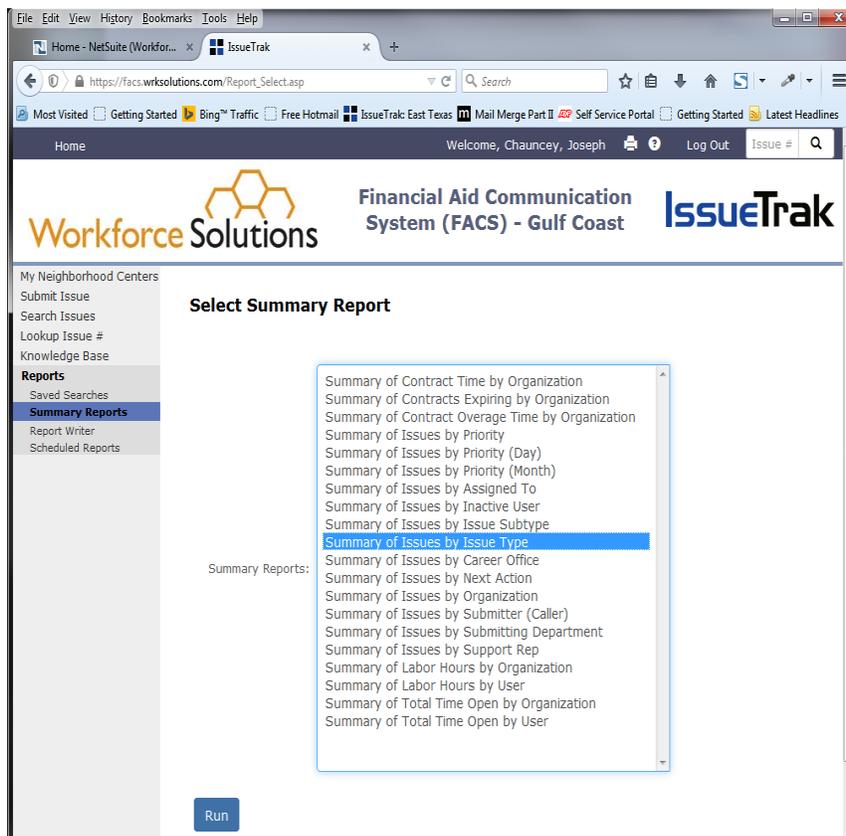
On the My Issues page under the My Reports header, saved searches are indicated with an (S).

1. Click the Hide Shared Reports link under the My Reports bar.
2. Your saved searches display.

Run a Report

To run a report:

1. Select Reports from the left navigation bar. The Summary Report screen displays. Select the report you wish to run. Note: This example shows the Summary of Issues by Issue Type report.
2. Click Run.



Workforce Solutions Financial Aid

- The report parameters page displays. Select your date from the dropdown to choose a range such as: This week, Last Month, Last Year, etc., which will automatically populate the start and end dates. Or manually set the date range you wish to view.
- Click Show Report.

The screenshot shows the 'Issues by Issue Type - Select Date Range' page. The date range is set to 'Last Month' with start and end dates of 11/01/2014 and 11/30/2014. The sort order is 'Issue Type'. There are 'Show Report' and 'Reset' buttons.

The report displays. Use the links on the Reports page to view more detail.

The report displays. Use the links on the Reports page to view more detail.

The screenshot shows the 'Issues by Issue Type - Results' page. It displays a table of issue counts for the period from 11/01/2014 to 11/30/2014. The table has columns for Issue Type, Opened Before (11/01/2014), In Period, Closed, and Left Open On (11/30/2014).

Issue Type	Opened Before 11/01/2014	In Period	Closed	Left Open On 11/30/2014
4 Week Seeking	0	1	0	1
Authorize Care/ Add a Child	0	2	0	2
Bill Services	89	123	102	110
Billing Inquiry	6	0	3	3
Can't Complete Referral	1	0	1	0
CCAA Issue	0	2	0	2
Child Care Billing Issue	28	25	27	26
Child Care Priority	14	22	28	8
Child w/Disability	4	2	1	5
Closure of Care	28	24	82	59
Customer Waiting in Office-	0	28	27	1
Immediate Need	23	7	9	21
Data Entry Issue	25	35	31	29
E-mailed Issue	1	1	0	2
Fraud Referral	0	2	1	1
General Question- Customer	0	2	1	1

DO'S AND DON'TS WHEN USING FACS

Do

Use FACS to:

- Request withdrawals, suspensions, four-week seeking, etc.
- Request a new voucher.
- Request a new vendor creation, or a fund source change.
- Check the status of an applications ONLY if it is outside the time frame for a case to be screened according to the weekly Funding Alert, or if priority service is requested.
- Check your Home Page - "Next Actioned to Me" link frequently.
- Close out Issues you submitted which have been resolved. Select the Quick Pick which applies to a message, whenever possible. This will ensure the Issue is submitted correctly.
- Complete the appropriate Issue Type and Next Action fields if you don't use a Quick Pick template.
- Ensure Child Care related Issues are assigned to "NCI Customer Service."
- Ensure voucher, payment request, and cash substitute Issues are sent to "Funds Analysts." .
- Request any payment related issues through a Career Office manager or Designee.

Don't

Use FACS to:

- Request eligibility to be processed for scholarships if funding is not available. If the customer will be placed on the registry, priority service is not needed.
- Check case status. Refer to the weekly Funding Alert for screening time frame.
- Effect reports by changing the Next Action field or Issue Type on Quick Picks.

Manager/Supervisors

Use the "Search Issues" page to:

- Confirm Issues assigned to your staff are being worked.
- Ensure Issues are completed correctly.

Note: Occasionally the "Next Action" field will be left blank, which prevents it from being sent to the appropriate team. Filter Issues by Career Office and Next Action for a list of Issues assigned to your office which are not 'Next Actioned' to someone.

See Search for Issue for more information.

WORKFORCE SOLUTIONS FINANCIAL AID POST-ASSESSMENT

Name: _____ Date: ___/___/___

Directions: Circle the letter of the BEST response to each of the following statements.

1. Workforce Solutions financial aid is divided into two categories:
 - A. Child Care and Other
 - B. Short-term and Substantial
 - C. Scholarships and Child Care
 - D. Over \$200 and under \$200
2. Enter income data from the Financial Aid Application into TWIST on the:
 - A. Employment Status tab
 - B. Income tab
 - C. Assessment tab
 - D. Income Redetermination tab
3. Marco has applied for Workforce Solutions financial aid to go to school. He lives with his mom, dad, and two sisters. Marco has an eight year old daughter. What is his family size?
 - A. Six: everyone in the household
 - B. Three: Marco, his mom and dad
 - C. Two: Marco and his daughter
 - D. Five: Marco, his mom, dad, and two sisters
 - E. Either C or D, whichever benefits Marco
4. When calculating income for WIOA eligibility:
 - A. Use only the most recent complete month's income
 - B. Use the most recent ninety days of income
 - C. Use the last twenty-six weeks of income
 - D. Only use 65% of the last twenty-six weeks of income

5. For an Out-of-school Youth you must determine the customer's economic eligibility with which challenge?
 - A. Homeless
 - B. School dropout
 - C. Received a high school diploma and is basic skills deficient or an English language learner
 - D. Pregnant or parenting

6. When applying for WIOA funds, Selective Service registration must be documented on:
 - A. All customers seeking financial aid from Workforce Solutions
 - B. All males born on or after January 1, 1960, who are at least 18 years of age
 - C. All males with active military service records after January 1, 1962
 - D. All customers who express an interest in entering military service during war time

7. When assessing income for WIOA:
 - A. Verify 65% of income earned in the 26 weeks prior to the date of the Financial Aid Application
 - B. Multiply the amount on the customer's paycheck by 12
 - C. Require self-employed customers to submit 12 months of business receipts
 - D. Make a determination based on the documentation received

8. In a two-parent family applying for financial aid for child care:
 - A. Both parents must each be working 25 hours per week
 - B. Both parents must each be working or going to school 25 hours per week
 - C. Both parents must be working and/or going to school for a combined total of 50 hours per week
 - D. None of the above

9. What desk aid provides Workforce Solutions guidelines for eligibility documentation sources for WIOA and child care?
 - A. Income and Family Definitions desk aid
 - B. Validating and Entering Qualifications desk aid
 - C. WIOA Eligibility Checklist
 - D. None of the above

10. An individual may meet the economic eligibility criteria to qualify for WIOA funds based on all but which of the following qualifiers:
- A. Receives public assistance, or received public assistance in the last six months
 - B. Is homeless
 - C. Has aged out of foster care
 - D. Receives, or is eligible to receive, free or reduced priced school lunch

Becky White submitted a WS Financial Aid Application requesting assistance to attend school, dated September 26, 2016. Her last day working was August 6, 2016. She also submitted all supporting documentation and two paychecks with the following information:

Pay Period	Pay Date	Gross Pay - This period	Gross Pay - YTD
3/1/2016 - 3/31/2016	4/1/2016	\$ 2,670.54	\$ 28,322.81
8/1/2016 - 8/31/2016	9/1/2016	\$ 909.86	\$ 37,601.30

11. What is the income determination period? (Use one of the resources mentioned in class)
- A. March 26, 2016 through September 24, 2016
 - B. March 25, 2016 through September 26, 2016
 - C. March 27, 2016 through September 25, 2016
 - D. June 26, 2016 through September 25, 2016
12. What is Becky's income for the **income determination period**?
- A. \$11,949.03
 - B. \$9,278.49
 - C. \$1,991.50
 - D. Not enough information to determine

13. Customers immediately eligible for child care financial aid include:
 - A. Individuals with low income
 - B. Families with children with disabilities
 - C. Low-income families with more than six children
 - D. Choices participants

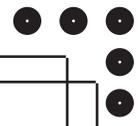
14. Providers of child care are classified as:
 - A. Regulated and unregulated
 - B. In-network and out-of-network
 - C. Licensed and unlicensed
 - D. Day care

15. Prior to adding a customer to the wait list, you must:
 - A. Establish eligibility
 - B. Determine the number of children that need care
 - C. Record the customer's contact information
 - D. Count the number of family members

16. Instruct customers added to the wait list to:
 - A. Call the career office once a month to keep their name on the list
 - B. Notify the career office if their address changes
 - C. Go to the nearest office if they get a letter from Workforce Solutions
 - D. Recertify every 12 months

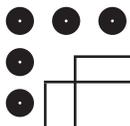
17. Prior to awarding financial aid for child care, make sure the customer:
 - A. Has signed the Parent Agreement
 - B. Has signed the Personal Responsibility Agreement
 - C. Knows how much the day care charges

18. Which of the following documentation is required to determine eligibility for financial aid for child care assistance?
 - A. Children's social security number
 - B. Child's proof of citizenship
 - C. Parent's proof of citizenship
 - D. Form 2050



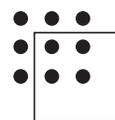
19. A customer eligible of Financial Aid for child care will receive care for a minimum of:
 - A. 6 months
 - B. 12 months
 - C. 18 months
 - D. 24 months

20. Cooperation with the Attorney General's office must be documented for:
 - A. All children under 18 in the household whose non-custodial parent is not also in the household
 - B. Only children who will be in child care
 - C. Only children in the household not the natural child of both parents
 - D. None of the above



NOTES

APPENDIX A: FINANCIAL AID APPLICATIONS AND FORMS



APPLICATION FOR FINANCIAL AID/SERVICES



INSTRUCTIONS

If you are applying for Financial Aid from Workforce Solutions, you must have a current employment plan developed with a Workforce Professional at a [Workforce Solutions Career Office](#). Individuals applying only for assistance with child care expenses do not need an employment plan and may complete and submit a Financial Aid Application per the directions below.

Workforce Professionals at a Workforce Solutions Career Office can answer questions you may have regarding the Financial Aid Application and provide information regarding the documents required to support your application.

Workforce Professionals at a Workforce Solutions Career Office will not be able to tell you if you are eligible for Workforce Solutions Financial Aid.

Customers can apply for financial aid by using an online fillable PDF version of the application found at www.wrksolutions.com or using paper forms from the office. It is not possible to save the information entered onto the PDF form. Customers must:

1. Complete Sections 1, 2 and 3 and sign each section
2. Read and sign the Orientation to Discrimination Complaint Procedures form
3. Complete the Addendum sections if they apply to you
 - a. Veterans Addendum – applies if you are a Veteran or a Federal Qualified Spouse
 - b. Addendum for Child Care Assistance – complete if you are applying for Child Care Assistance.

Once you have completed the parts of the Financial Aid Application package per the guidance above, you must print the Financial Aid Application and submit it with the documents that support your eligibility for financial assistance. The Workforce Solutions Career Office can help transmit your completed application to our Financial Aid Support Office or you can transmit your application directly to:

Financial Aid Support Office
P.O. Box 924586
Houston, Texas 77292
Fax number – 713-266-2495
Email – supportcenter@wrksolutions.com

If you need an accommodation to complete the application process please contact your local [Workforce Solutions Office](#) for assistance.

WHAT ARE THE PRIMARY SERVICES YOU ARE HOPING TO RECEIVE FROM US?
<input type="checkbox"/> Help with paying for school or training. *
<input type="checkbox"/> Help with Child Care expenses. Please complete Section VI: Addendum for Child Care Assistance
<input type="checkbox"/> Help with paying for transportation, clothing, etc. to accept or keep a job. *
<input type="checkbox"/> Help with getting work experience or training while on a job*
<input type="checkbox"/> Other *
* Did you discuss with a Career Office Workforce Professional? <input type="checkbox"/> YES <input type="checkbox"/> NO

www.wrksolutions.com 1.888.469.JOBS (5627)

Workforce Solutions is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. (Please request reasonable accommodations a minimum of two business days in advance.) Relay Texas Numbers: 1.800.735.2989 (TDD) 1.800.735.2988 (voice) or 711

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Visit www.wrksolutions.com
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Appendix A-I

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Version 3.2-gc (24), 2/24/20

APPLICATION FOR FINANCIAL AID/SERVICES



SECTION I – APPLICANT INFORMATION

Name (First, MI, Last):		Date of Birth	Age
Residence Address:		City, State, Zip Code and County	
Mailing Address		City, State, Zip Code and County	
Phone	Cell Phone	Alternate Phone	Alternate Cell Phone
E-mail		Social Security No*:	Today's Date:
Are you a citizen of the United States? <input type="checkbox"/> YES <input type="checkbox"/> NO		If no, are you authorized to work in the U.S.? <input type="checkbox"/> YES <input type="checkbox"/> NO	
Males 18 and older - registered for Selective Service? <input type="checkbox"/> YES <input type="checkbox"/> NO		Do you or your spouse currently serve in the military? <input type="checkbox"/> YES <input type="checkbox"/> NO	
		Did you or your spouse serve in the military? <input type="checkbox"/> YES <input type="checkbox"/> NO If yes, complete Section V: Veterans Addendum 5.	
Race - Please check all that apply. <input type="checkbox"/> White <input type="checkbox"/> Black or African American <input type="checkbox"/> Asian <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Hawaiian Native or Pacific Islander <input type="checkbox"/> Choose not to answer		Ethnicity: Hispanic/Latino: <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> Choose not to answer	Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Choose not to answer

EMPLOYMENT

Are you currently employed? <input type="checkbox"/> YES <input type="checkbox"/> NO	What is your most recent occupation?			Years of experience in this occupation
Name of employer:	Number of hours per week:	Start Date:	End Date:	Pay Frequency: <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Twice/Mo. <input type="checkbox"/> Monthly
If you are employed, have you received a lay-off notice? <input type="checkbox"/> YES <input type="checkbox"/> NO		Have you remained at worksite overnight? <input type="checkbox"/> YES <input type="checkbox"/> NO		
If you are unemployed, how did your last job end? <input type="checkbox"/> Quit <input type="checkbox"/> Laid off <input type="checkbox"/> Terminated <input type="checkbox"/> Company Closed				
Are you available to work? <input type="checkbox"/> YES <input type="checkbox"/> NO		Have you been unable to find a job in your most recent occupation or industry? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Do you believe you need services from Workforce Solutions to help you get a better job, or keep a job to support yourself and your family? <input type="checkbox"/> YES <input type="checkbox"/> NO			What kind of work do you hope to find?	
Do you believe you are unsuccessful in your job search because you: (Check all that apply)				
<input type="checkbox"/> don't speak English very well;		<input type="checkbox"/> need to improve your interviewing skills;		
<input type="checkbox"/> don't have a high school diploma, GED;		<input type="checkbox"/> lack occupational skills to earn self-sufficient wages;		
<input type="checkbox"/> cannot read or do math well;		<input type="checkbox"/> don't have the skills to successfully job search;		
<input type="checkbox"/> other: Explain:		<input type="checkbox"/> don't know how to use a computer;		
If you have more than one employer, add that employer on Section IV.				

EDUCATION

Are you currently attending school or training? <input type="checkbox"/> YES <input type="checkbox"/> NO		If NO, date you last attended school:		
If attending high school, name of school:		What grade are you currently in?	Have you missed 10 days or more of school? <input type="checkbox"/> YES <input type="checkbox"/> NO	
If attending post-secondary school or training, name of school:		No. of class hours/week:	No. of semester credit hours	Job Corps: <input type="checkbox"/> YES <input type="checkbox"/> NO
Have you applied for FAFSA? <input type="checkbox"/> YES <input type="checkbox"/> NO If YES, when did you apply?		Do you receive scholarships, grants, or loans to help you go to school? <input type="checkbox"/> YES <input type="checkbox"/> NO		If Yes, enter amount, if known: \$
What is the highest grade you've completed ? <input type="checkbox"/> <9 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> Twelve grade completed – No Diploma <input type="checkbox"/> High School Diploma <input type="checkbox"/> GED <input type="checkbox"/> Skill Certificate <input type="checkbox"/> IEP Certificate <input type="checkbox"/> 1 year completed College <input type="checkbox"/> Associate Degree <input type="checkbox"/> Bachelor's Degree <input type="checkbox"/> Masters <input type="checkbox"/> Doctorate				

*Optional

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APPLICATION FOR FINANCIAL AID/SERVICES



ADDITIONAL INFORMATION					
Are you a foster child? <input type="checkbox"/> YES <input type="checkbox"/> NO		Have you ever been a foster child? <input type="checkbox"/> YES <input type="checkbox"/> NO		Did you age out or at 16+years left for guardianship or adoption? <input type="checkbox"/> YES <input type="checkbox"/> NO	
Have you ever been convicted of a misdemeanor? <input type="checkbox"/> YES <input type="checkbox"/> NO			Have you ever been convicted of a felony? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Do you have a record of arrest? <input type="checkbox"/> YES <input type="checkbox"/> NO			What was your release date?		
Are you a teenager who is currently pregnant or parenting? <input type="checkbox"/> YES <input type="checkbox"/> NO			Do you consider yourself a runaway? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Are you a Seasonal Farm Worker? <input type="checkbox"/> YES <input type="checkbox"/> NO			Are you a food processor worker? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Do you have family assets that exceed \$1,000,000.00? <input type="checkbox"/> YES <input type="checkbox"/> NO			Are you disabled? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Do any of the situations apply to your family? You reside with a parent or guardian: <input type="checkbox"/> YES <input type="checkbox"/> NO You reside with friends/family other than parent or guardian: <input type="checkbox"/> YES <input type="checkbox"/> NO			Your current nighttime residence is: Motel, car, or campsite? <input type="checkbox"/> YES <input type="checkbox"/> NO Shelter or temporary housing? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Have any of these agencies determined your family is experiencing homelessness? <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> Homeless Shelter <input type="checkbox"/> School District <input type="checkbox"/> Transitional Housing Program <input type="checkbox"/> Other Social Service Agency Identify Shelter/School/Social Service Agency:					
Primary Language Spoken at Home <input type="checkbox"/> – English <input type="checkbox"/> – Spanish <input type="checkbox"/> – Native Central, South American and Mexican languages (e.g., Mixteco, Quichean) <input type="checkbox"/> – Caribbean languages (e.g., Haitian-Creole, Patois) <input type="checkbox"/> – Middle Eastern and South Asian languages (e.g., Arabic, Hebrew, Hindi, Urdu, Bengali) <input type="checkbox"/> – East Asian Languages (e.g., Chinese, Vietnamese, Tagalog) <input type="checkbox"/> – Native North American/Alaskan Native languages <input type="checkbox"/> – Pacific Island languages (e.g., Palauan, Fijian) <input type="checkbox"/> – European and Slavic languages (e.g., German, French, Italian, Croatian, Yiddish, Portuguese, Russian) <input type="checkbox"/> – African languages (e.g., Swahili, Wolof) <input type="checkbox"/> – Other (e.g., American Sign Language) <input type="checkbox"/> – Unspecified (Unknown or head of household declined to identify home language)					
CHECK ANY BENEFITS YOU (OR A FAMILY MEMBER) RECEIVE NOW OR RECEIVED IN THE LAST SIX MONTHS:					
Now	Last six months	Start Date	Type of Benefit		Covered by the Benefit
<input type="checkbox"/>	<input type="checkbox"/>		Temporary Assistance for Needy Families (TANF)		<input type="checkbox"/> You <input type="checkbox"/> Family Member
<input type="checkbox"/>	<input type="checkbox"/>		Supplemental Nutritional Assistance (SNAP)	Cert Date	<input type="checkbox"/> You <input type="checkbox"/> Family Member
<input type="checkbox"/>	<input type="checkbox"/>		Supplemental Nutritional Assistance (SNAP) ABAWD		<input type="checkbox"/> You
<input type="checkbox"/>	<input type="checkbox"/>		Supplemental Security Income (SSI)	\$ Last Date Pd	<input type="checkbox"/> You <input type="checkbox"/> Family Member
<input type="checkbox"/>	<input type="checkbox"/>		Social Security Disability Income (SSDI)		<input type="checkbox"/> You <input type="checkbox"/> Family Member
<input type="checkbox"/>	<input type="checkbox"/>		Unemployment Insurance		<input type="checkbox"/> You
<input type="checkbox"/>	<input type="checkbox"/>		Trade Act Assistance (TAA)		<input type="checkbox"/> You
<input type="checkbox"/>			Free or reduced-price school lunch		<input type="checkbox"/> You <input type="checkbox"/> Family Member – Who?
<input type="checkbox"/>	<input type="checkbox"/>		Refugee Assistance		
<input type="checkbox"/>	<input type="checkbox"/>		Other State/Local Income Based Public Assistance	\$ Source	<input type="checkbox"/> You <input type="checkbox"/> Family Member
<input type="checkbox"/>	<input type="checkbox"/>		Ticket to Work Program Holder		

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SECTION II – FAMILY INFORMATION

Complete the section below about all the people who live in your home. Begin with your information, and then list the people who live with you and their relationship to you. List each person's date of birth and approximate monthly gross income.

Name	Relationship	Dependent of Applicant?	Date of Birth	Any Income in last six months?	Gross Monthly Income	Check if this person has a disability*	Check if this person requires child care**
	Self	<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/>	<input type="checkbox"/>

If you have more than ten people living in your home, add them here:

* Optional

** Do you have ongoing medical expenses for a child with a disability? YES NO If yes, provide documentation of these expenses.

DISCLAIMERS AND SIGNATURE
 – READ ALL DISCLAIMERS AND CHECK ALL BOXES BELOW –
 SIGN AND DATE
 (If applicant is a minor, parent/guardian must sign)

APPLICATION FOR FINANCIAL AID/SERVICES



SECTION IV – FAMILY EMPLOYMENT HISTORY

Provide your family's employment history for the six months before the date of this application. Please list all employers you had during this time. Start with your most recent employer. A separate sheet of paper may be used if needed.

Name of Family Member:		Name of Employer:		Employer's Address:		Employer's phone number:		Does/did this employer provide bonuses? <input type="checkbox"/> No <input type="checkbox"/> Yes – How often:	
Start Date:	Pay Rate: <input type="checkbox"/> Hour <input type="checkbox"/> Week	/per <input type="checkbox"/> Month <input type="checkbox"/> Year	Number of hours per week:	Pay Frequency: <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Twice/Mo. <input type="checkbox"/> Monthly	Are you currently employed with this company?	Last day of employment:	<input type="checkbox"/> YES <input type="checkbox"/> NO		
Name of Family Member:		Name of Employer:		Employer's Address:		Employer's phone number:		Does/did this employer provide bonuses? <input type="checkbox"/> No <input type="checkbox"/> Yes – How often:	
Start Date:	Pay Rate: <input type="checkbox"/> Hour <input type="checkbox"/> Week	/per <input type="checkbox"/> Month <input type="checkbox"/> Year	Number of hours per week:	Pay Frequency: <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Twice/Mo. <input type="checkbox"/> Monthly	Are you currently employed with this company?	Last day of employment:	<input type="checkbox"/> YES <input type="checkbox"/> NO		
Name of Family Member:		Name of Employer:		Employer's Address:		Employer's phone number:		Does/did this employer provide bonuses? <input type="checkbox"/> No <input type="checkbox"/> Yes – How often:	
Start Date:	Pay Rate: <input type="checkbox"/> Hour <input type="checkbox"/> Week	/per <input type="checkbox"/> Month <input type="checkbox"/> Year	Number of hours per week:	Pay Frequency: <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Twice/Mo. <input type="checkbox"/> Monthly	Are you currently employed with this company?	Last day of employment:	<input type="checkbox"/> YES <input type="checkbox"/> NO		
Name of Family Member:		Name of Employer:		Employer's Address:		Employer's phone number:		Does/did this employer provide bonuses? <input type="checkbox"/> No <input type="checkbox"/> Yes – How often:	
Start Date:	Pay Rate: <input type="checkbox"/> Hour <input type="checkbox"/> Week	/per <input type="checkbox"/> Month <input type="checkbox"/> Year	Number of hours per week:	Pay Frequency: <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Twice/Mo. <input type="checkbox"/> Monthly	Are you currently employed with this company?	Last day of employment:	<input type="checkbox"/> YES <input type="checkbox"/> NO		

I certify that this information is true and complete to the best of my knowledge.

Signature of Applicant

Date

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APPLICATION FOR FINANCIAL AID/SERVICES



SECTION V – VETERANS ADDENDUM

Veterans and Qualified Spouses

Eligible veterans and their qualified spouses receive preference for service when Workforce Solutions has limited resources. Please check a box below if it describes you.

- Federal/State Qualified Veteran – I served in the active military, naval, or air service and was discharged or released there from under conditions other than dishonorable as specified at 38 U.S.C. 101(2). Active services include full-time duty in the National Guard or Reserve component, other than full-time for training purposes.

Branch:	Component (Active, Reserve, or Guard):	Date entered:
Date discharged:	Type of discharge:	
Military occupational specialty (clear text):		
If employed, have you been able to find employment related to your military occupational specialty? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Do you plan to return to active military service? <input type="checkbox"/> YES <input type="checkbox"/> NO		

Federal Qualified Spouse

- I am the spouse of a veteran who died of a service-connected disability
- I am the spouse of a member of the Armed Forces serving on active duty who at the time of application for priority, is listed in one or more of the following categories and has been so listed for a total of more than 90 days:
- Missing in action
 - Captured in line of duty by a hostile force, or
 - Forcibly detained or interned in line of duty by a foreign government or power
- I am the spouse of a veteran who has a total disability resulting from a service-connected disability, as evaluated by the Department of Veteran Affairs
- I am the spouse of a veteran who died while a total disability resulting from a service-connected disability, as evaluated by the Department of Veteran Affairs, was in existence

State Qualified Spouse

- I am a spouse who meets the definition of a federal qualified spouse
- I am the spouse of any member of the Armed Forces who died while serving on active military, naval, or air service.

I (print your name) _____ attest that I meet the definition marked above and the associated eligibility criteria. I certify the information stated above is true and accurate to the best of my knowledge, and I understand that if I have misrepresented myself, there may be grounds for immediate termination or services and/or penalties as specified by law. I understand I must report any change in my veteran status to Workforce Solutions within 10 calendar days. I further understand that if the definition marked above is based on a military record that I know is fraudulent, fictitious, or has been revoked, I also may be subjected to penalties as provided in Acts 2011, 82nd Legislature, Chapter 386 (SB 431), as codified in Texas Penal Code Section 32.54.

Signature of Applicant

Date

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APPLICATION FOR FINANCIAL AID/SERVICES



GULF COAST WORKFORCE BOARD ORIENTATION TO DISCRIMINATION COMPLAINT PROCEDURES FORM (29 CFR Part 38)

This Orientation to Discrimination Complaint Procedures form addresses discrimination complaint procedures for the listed programs and services administered in the local workforce development area by the Workforce Development Board and its Contractors:

**Workforce Innovation and Opportunity Act (WIOA)
Temporary Assistance for Needy Families (TANF) / CHOICES
Supplemental Nutrition Assistance Program Employment & Training (SNAP E&T)
Child Care Services (CC)
Trade Adjustment Assistance (TAA) and Trade Readjustment Allowances (TRA)**

THE RECIPIENT OF THE FEDERAL FINANCIAL ASSISTANCE IS:

**Gulf Coast Workforce Board
3555 Timmons Lane
Houston, TX 77227**

**Equal Opportunity (EO) Officer: Bobi Cook
Telephone Number: (713) 627-3200
Relay Texas: 1-800-735-2989/ TTY 1-800-735-2988 (Voice)**

The Gulf Coast Workforce Board (the Board) shall resolve equal opportunity complaints in a fair and prompt manner. Acts of restraint, interference, coercion, discrimination, or reprisal towards complainants exercising their rights to file a complaint under this procedure are prohibited. This procedure applies to all applicants and participants who have cause to file a discrimination complaint related to activities or programs administered by the Board. If you have an equal opportunity complaint concerning any of these programs, you may submit your written complaint to the Board or Contractor EO Officer, as appropriate.

After your equal opportunity complaint has been received, the EO Officer will notify you of the next step in the complaint process. As long as you wish to pursue your complaint, the Board or Contractor will follow the steps described below. You should study the Discrimination Complaint Procedure carefully, and if you feel that the required steps are not being followed, contact the EO Officer. Remember, if you feel you are not being provided enough help at any stage of the complaint process, you should contact:

**Texas Workforce Commission (TWC)
Equal Opportunity Monitoring
101 E. 15th St., Room 242-T
Austin, TX 78778-0001**

**Telephone Numbers:
(512) 463-2400
Relay Texas: 1-800-735-2989
TTY 1-800-735-2988 (Voice)**

EQUAL OPPORTUNITY IS THE LAW

It is against the law for this recipient of Federal financial assistance to discriminate on the following bases: against any individual in the United States, on the basis of race, color, religion, sex (including pregnancy, childbirth, and related medical conditions, sex stereotyping, transgender status, and gender identity), national origin (including limited English proficiency), age, disability, or political affiliation or belief, or, against any beneficiary of, applicant to, or participant in programs financially assisted under Title I of the Workforce Innovation and Opportunity Act, on the basis of the individual's citizenship status or participation in any WIOA Title I-financially assisted program or activity. The recipient must not discriminate in any of the following areas: deciding who will be admitted, or have access, to any WIOA Title I-financially assisted program or activity; providing opportunities in, or treating any person with regard to, such a program or activity; or making employment decisions in the administration of, or in connection with, such a program or activity. Recipients of federal financial assistance must take reasonable steps to ensure that communications with individuals with disabilities are as effective as communications with others. This means that, upon request and at no cost to the individual, recipients are required to provide appropriate auxiliary aids and services to qualified individuals with disabilities.

What to do if you believe you have experienced discrimination. If you think that you have been subjected to discrimination under a WIOA Title I-financially assisted program or activity, you may file a complaint within 180 days from the date of the alleged violation with either: the recipient's Equal Opportunity Officer (or the person whom the recipient has designated for this purpose); or the Director, Civil Rights Center (CRC), U.S. Department of Labor, 200 Constitution Avenue NW, Room N-4123, Washington, DC 20210. If you file your complaint with the recipient, you must wait either until the recipient issues a written Notice of Final Action, or until 90 days have passed (whichever is sooner), before filing with the Civil Rights Center (see address above). If the recipient does not give you a written Notice of Final Action within 90 days of the day on which you filed your complaint, you may file a complaint with CRC before receiving that Notice. However, you must file your CRC complaint within 30 days of the 90-day deadline (in other words, within 120 days after the day on which you filed your complaint with the recipient). If the recipient does give you a written Notice of Final Action on your complaint, but you are dissatisfied with the decision or resolution, you may file a complaint with CRC. You must file your CRC complaint within 30 days of the date on which you received the Notice of Final Action.

PROCEDURES ON HOW TO FILE A COMPLAINT

- WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) / TRADE ADJUSTMENT ASSISTANCE (TAA) and TRADE READJUSTMENT ALLOWANCES (TRA):**
If you think you have been subjected to equal opportunity discrimination under a WIOA Title I or a TAA/TRA financially assisted program or activity, you may file a discrimination complaint within 180 days from the date of the alleged violation with either the Board/Contractor Equal Opportunity Officer (or designee) or Director, Civil Rights Center (CRC), U.S. Dept. of Labor, 200 Constitution Avenue NW, Room N-4123 Washington, DC 20210. If you file your complaint with the Board or Contractor, you must wait until you receive a written Notice of Final Action or 90 days have passed (whichever is sooner) before you can file with the CRC. If the written Notice of Final Action is not issued within 90 days of the day you filed your complaint, you have 30 days following the 90-day deadline to file a complaint with CRC (that is, within 120 days of the day you first filed your complaint). If you receive a written Notice of Final Action on your complaint but are dissatisfied with the decision, you may file a complaint with CRC. However, you must file your CRC complaint within 30 days of receiving the Notice of Final Action.
- TEMPORARY ASSISTANCE FOR NEEDY FAMILIES (TANF) / CHOICES and/or CHILD CARE SERVICES (CC):**
If you think you have been subjected to equal opportunity discrimination under a TANF/Choices and/or Child Care (CC) program or activity receiving federal financial assistance, you may file a complaint within 180 days from the date of the alleged violation with either the Board/Contractor Equal Opportunity Officer (or designee) or U.S. Department of Health and Human Services (HHS), the Office for Civil Rights, 1301 Young Street, Suite 1169, Dallas, TX 75202, (800) 368-1019. Those filing complaints against child care program services receiving USDA federal financial assistance may choose to contact the U.S. Department of Agriculture (USDA), Office of Adjudication, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410. If you file your complaint with the Board or Contractor, you must wait until a written Notice of Final Action is issued or until 90 days have passed (whichever is sooner) before you can file with the U.S. Department of Health and Human Services.
- SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM EMPLOYMENT AND TRAINING (SNAP E&T):**
If you think you have been subjected to discrimination under a SNAP E&T financially assisted program or activity, you may file a complaint within 180 days from the date of the alleged violation with either the Board/Contractor Equal Opportunity Officer (or designee) or the U.S. Department of Agriculture, Director, Office of Adjudication, 1400 Independence Avenue, SW, Washington, DC 20250-9410, (202) 260-1026. If you file your complaint with the Board or Contractor, you must wait either until a written Notice of Final Action is issued or until 90 days have passed (whichever is sooner) before filing with the U.S. Department of Agriculture.

Please do not sign this notice until you have read it and understand its contents.

By my signature below, I acknowledge this orientation to the discrimination complaint procedure and the statement regarding Equal Opportunity Is the Law. I affirm that I have read the Orientation to Discrimination Complaint Procedures Form and that I have been given the opportunity to ask questions about its contents. I understand that the One-Stop application form is not a job application; rather, this form is used to determine my eligibility to receive program services and to meet federal reporting requirements. I further understand that failure to provide

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APPLICATION FOR FINANCIAL AID/SERVICES



SECTION VI – ADDENDUM FOR CHILD CARE ASSISTANCE

If you are applying for Financial Aid for Child Care Assistance:

1. Carefully read this document
2. Initial you understand and agree to each responsibility that will apply to you should we award Financial Aid
3. Sign and Date the Parent Acknowledgement page
4. Submit this form with your Financial Aid Application

PARENT AGREEMENT

Your Rights

1. You have the right to expect good service from Workforce Solutions.
2. You will receive financial aid regardless of race, color, national origin, age, sex, disability, political beliefs, or religion.
3. We assure you that we will treat any personal information you give to Workforce Solutions as confidential.
4. You may choose the child care arrangement best meeting your needs, including care provided by a child's relative.
5. You have the right to report a change in work or education/training that may result in an increase in the level of financial aid you receive.
6. We'll notify you fifteen (15) days before we end or change the payment of care unless you voluntarily withdraw or in cases where fraud has been determined.
7. If you are required to pay a monthly fee to your child care provider, you have the right to report a change in family composition or income which may lower your monthly fee. If you failed to pay your portion of the child care parent fee as agreed below, Workforce Solutions will discontinue your child care.
8. If your child care is discontinued due to excessive absences or failure to pay your monthly parent fee, you can reapply after a 60-day waiting period.

Your Responsibilities

Workforce Solutions wants you to understand your responsibilities if we determine you are eligible for financial aid for child care assistance.

Please read the responsibility statements below, initial each responsibility signifying you understand your responsibility and will comply, and sign in the space provided at the bottom of this document.

Some Responsibility statements will not apply to all families receiving financial aid for child care. These are identified with the * symbol. If you have questions regarding any of these responsibilities, please contact Workforce Solutions at 1-888-469-5627, select option 3, and then option 2 -- or call 713-334-5980.

1. Family/Income*

I understand I qualify for child care financial aid based upon my family's income and size. If my family experiences a change in income or family composition that would put my family income above the limits detailed at <http://www.wrksolutions.com/for-individuals/financial-aid-for-child-care>. I must report such change to Workforce Solutions within 14 days. Failure to report this information within 14 days may result in disallowed costs I will have to repay.

Important: We can help. If you are not sure if your change in income or family composition would result in your family exceeding the limits on the chart referenced above, you can contact Workforce Solutions and our staff will help determine if your change in income or family status results in your family exceeding the limit.

Parent's Initials _____

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2. Work/Training Education*

I understand I am able to get child care so I can work, go to school, or attend job training classes. If I am no longer working, no longer in school, or no longer attending job training classes, I will notify Workforce Solutions within 14 days of the change. Failure to report this information within 14 days may result in disallowed costs I will have to repay.

Important: We can help. If you are not sure if your change in income or family composition would result in your family exceeding the limits on the chart referenced above, you can contact Workforce Solutions and our staff will help determine if your change in income or family status results in your family exceeding the limit.

Parent's Initials _____

3. Contact Information

I understand I must report any changes in my family's residence, primary phone number, or email address. **I will notify Workforce Solutions within 14 days of the change.**

Parent's Initials _____

4. Parent Fee*

If I am determined eligible and awarded financial aid and required to pay a parent share of cost fee, I agree to pay my monthly parent fee to my chosen child care provider. Workforce Solutions assesses a sliding scale fee based on my family's gross income, composition and the number of children in care. I understand that my parent fee may decrease depending on changes in family composition, income or the number of children in care. I must notify Workforce Solutions if I have changes in my family composition, income or number of children in care. Workforce Solutions may adjust my monthly parent fee based on the changes I report. My monthly fee will not increase unless the number of children in care increases. I understand that failure to pay the parent fee may result in termination of my financial aid for child care.

Parent's Initials _____

5. Choice of Providers

I understand if I choose:

- a. **a relative to provide care for my child:** the decision to choose my child's relative is mine alone for which I am fully responsible. I understand that my child's relative is not subject to health and safety requirements required of a regulated child care provider. I am responsible for setting requirements for the care provided by my child's relative. I understand that neither the Houston-Galveston Area Council, through Workforce Solutions nor any of its employees, affiliates or contractors, is responsible for actions or omissions of my child's relative providing child care or for the health and safety of my child.
- b. **a regulated provider to provide care for my child:** the decision to choose a particular provider is mine alone for which I am fully responsible. I understand neither the Houston-Galveston Area Council, through its Workforce Solutions workforce system nor any of its employees, affiliates or contractors, is responsible for actions or omissions of a regulated provider or for the health and safety of my child.
- c. **a regulated provider that has earned Texas Rising Star (TRS) certification:** I understand that the TRS designation indicates that a provider has quality standards that exceed State minimum standards and should be considered when choosing a provider to care for my child.

Parent's Initials _____

6. Reporting Attendance

If I am determined eligible and awarded financial aid, I understand:

- a. I must use the attendance card to report my child's attendance and absences;
- b. I can designate up to three individuals as alternate card holders to report attendance/absences on my behalf; and the secondary cardholder must be at least 16 years old, unless the individual is the child's parent;
- c. I (or my alternate cardholders) must review the receipt generated by the attendance card machine to confirm my child's attendance is approved for the day.
- d. I must inform Workforce Solutions within six (6) days when my attempt to record attendance is denied or rejected and cannot be corrected at the child care provider site.

Parent's Initials _____

www.wrksolutions.com 1.888.469.JOBS (5627)

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APPLICATION FOR FINANCIAL AID/SERVICES



7. Security Agreement Requirements for the Attendance Card

a. I will not let any other individual, child care provider, or its owner, director, assistant director, or employees possess, accept, or use my card or PIN, (or my alternate cardholders' card or PIN), to perform the attendance/absence reporting function on my behalf.

b. I will not designate the child care provider staff, owner, director, or assistant director as an alternate cardholder.

c. I am responsible for any misuse of the attendance card by my alternate cardholders.

d. I am responsible for informing alternate cardholders of these requirements and their responsibility for using the attendance card.

e. I will report misuse of my attendance cards and/or PINs to Workforce Solutions.

Workforce Solutions will take appropriate action against anyone who fails to abide by the above security requirements for the attendance card, including denying referrals to a vendor holding a card, moving children to another vendor selected by the parent, withholding vendor payments or reimbursement of costs incurred, recoupment of funds, and may include filing criminal charges with the appropriate authorities.

Parent's Initials _____

*** Exceptions:**

Family Income is not a requirement for all customers. These families also do not have a share of cost, and care may be authorized to look for work:

- Parents eligible for financial aid because they are participating in TANF Choices or SNAP E&T
- Parents of children experiencing homelessness.

YOUR PROVIDER SELECTION

You should have chosen a child care provider for your child(ren) and contacted them to determine if space is available. Please list the details for your chosen provider below. If you have more than one provider, use the second box for the additional provider.

Provider name:	Address:			Phone:	
Child name (list each child who needs care on a separate line)	Currently attending w/ provider? (circle one)	Transportation Needed? (circle one)	Days of the week care is needed (circle all)	Type of Care** (circle one)	Desired start date
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	

**Circle part time if you need before and after school care during the school year, and full time care only during the summer and school breaks

** Circle full time if you need care for a child age 5 or younger who will be in care 6 or more hours per day

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APPLICATION FOR FINANCIAL AID/SERVICES



Additional provider, if applicable:

Provider name:	Address:			Phone:	
Child name (list each child who needs care on a separate line)	Currently attending w/ provider? (circle one)	Transportation Needed? (circle one)	Days of the week care is needed (circle all)	Type of Care** (circle one)	Desired start date
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	
	Y / N	Y / N	M T W T F S S	Part / Full	

**Circle part time if you need before and after school care during the school year, and full time care only during the summer and school breaks
 ** Circle full time if you need care for a child age 5 or younger who will be in care 6 or more hours per day

Parent Acknowledgement

- I understand that a person, who obtains or attempts to obtain by fraudulent means services to which the person is not entitled, may be prosecuted under applicable state and federal laws.
- I also acknowledge the Parent Handbook can be found on the [Workforce Solutions](#) website and Workforce Solutions staff are available to answer my questions.
- If I receive Financial Aid from Workforce Solutions, I will ensure my child attends child care on a regular basis.
- If I receive Financial Aid from Workforce Solutions, I understand that if my child exceeds forty (40) total absences any time during my 12-month eligibility period, my child will not be eligible for child care services for 2 months from the date care was ended, and I will have to reapply for services. Absences due to a child's documented chronic illness, disability, or court ordered visitation do not count toward the maximum absences allowed.
- If I receive Financial Aid from Workforce Solutions, I acknowledge that failure to meet my provider's established attendance policy may result in the provider ending my child's enrollment.
- I acknowledge that failure to pay my parent share of cost may result in the termination of my child care financial aid.
- I give permission to Workforce Solutions to contact third parties to verify income and family composition or to use information from the financial aid application for identification and verification of income.
- I acknowledge the information on this Parent Agreement including my: Rights, Provider Selection and Responsibilities. I have the right to request a change in my provider selection.
- I acknowledge that I have the right to appeal a decision by Workforce Solutions to terminate my child care services. If care is terminated due to absences or a failure to pay the parent share of cost to the provider, child care financial aid will not continue during the appeal process.
- I acknowledge the information I provide to determine my eligibility is subject to validation through cross-checks against state and federal databases, and that I may be asked to participate in face-to-face interviews and provide original documents to verify my identity and eligibility for child care financial aid.

Parent Signature

Printed Name

Date

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Appendix A-I 2

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Version 3.2-gc (24), 2/24/20



Application for Financial Aid



DOCUMENTS CHECKLIST

We keep your application on file for _____ days. By (date) _____ / _____ we need the documents checked below as proof that the information on your application is true and correct.

You can fax the documents to me at: _____.

If you cannot get some of the required documents please call me at: _____.

I can help you get what need or tell you about alternatives.

Documents Needed For You (only those checked by your counselor)

- Government or School Issued Picture ID (name document) _____
- US Birth or Hospital Certificate or Passport
- Non-citizen Eligible to work in US _____
- Pay stubs for 26 weeks beginning _____ and ending _____
- Pay stubs for the weeks _____
- Letter from your employer on letterhead showing employment dates, work hours and pay
- Child Support Income award or payment history, or verification of receipt of cooperation with the Attorney General
- Current class schedule including semester end date and credit hours
- Current school transcript
- High school students – letter stating number of days and hours you attend school
- Employment verification form signed by your employer
- Proof of employment challenge for youth (list document) _____
- Other (list): _____

For Your Adult Family Members (list names of family members)

1. _____
2. _____
3. _____
4. _____

- Pay stubs for 26 weeks beginning _____ and ending _____
- Pay stubs for the weeks _____
- Letter from your employer on letterhead showing employment dates, work hours and pay
- Other (list): _____

For Your Children under 13 years old or under 19 years old if disabled

- Proof of her/his Citizenship or her/his Legal Immigrant Status
- Proof of child's disability _____
- Name and telephone number of daycare facility you children will attend _____

As soon as we have all the necessary documents, we will be able to tell you if you qualify for Workforce Solutions financial aid. We must always receive confirmation that funds are available before awarding financial aid.

WORKFORCE INNOVATION AND OPPORTUNITY ACT AUTHORIZATION TO WORK - CHECKLIST

Copies of the appropriate documents must be maintained in the customer's official record

For individuals to participate in Workforce Innovation and Opportunity Act programs, they must be authorized to work in the United States. Please complete the following form, choosing one item from List A, or one item from List B and one item from List C.

	Alejandro		
--	-----------	--	--

Print Name: Last

First

MI

Maiden Name

Date of Birth (month/day/year)

Social Security Number

All documents must be unexpired

LIST A	LIST B	LIST C
Documents That Establish Both Identity and Employment Eligibility	Documents That Establish Identity	Documents That Establish Employment Eligibility
OR		AND
<input type="checkbox"/> U.S. Passport or U.S. Passport Card <input type="checkbox"/> Permanent Resident Card or Alien Registration Receipt Card (Form I-551) <input type="checkbox"/> Foreign Passport, that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigration visa <input type="checkbox"/> Employment Authorization Document that contains a Photograph (Form I-766) <input type="checkbox"/> In the case of a nonimmigrant alien authorized to work for a specific employer incident to status, a foreign passport with Form I-94 or Form I-94A bearing the same name as the passport and containing an endorsement of the alien's nonimmigrant status, as long as the period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form <input type="checkbox"/> Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI	<input type="checkbox"/> Driver's License or ID Card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address <input type="checkbox"/> ID Card issued by federal, state, or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color and address <input type="checkbox"/> School ID Card with a photograph <input type="checkbox"/> Voter's Registration Card <input type="checkbox"/> U.S. Military Card or Draft Record <input type="checkbox"/> Military Dependent's ID Card <input type="checkbox"/> U.S. Coast Guard Merchant Mariner Card <input type="checkbox"/> Native American Tribal Document <input type="checkbox"/> Driver's License issued by a Canadian government authority For persons under age 18 who are unable to present a document listed above: <input type="checkbox"/> School record or report card <input type="checkbox"/> Clinic, doctor, or hospital record <input type="checkbox"/> Day care or nursery school record	<input type="checkbox"/> Social Security Account Number card other than one that specifies on the face that the issuance of the card does not authorize employment in the United States <input type="checkbox"/> Certificate of Birth Abroad issued by the Department of State (Form FS-545) <input type="checkbox"/> Certification of Report of Birth issued by the Department of State (Form DS-1350) <input type="checkbox"/> Original or certified copy of a birth certificate issued by a State, county, municipal authority or territory of the United States bearing an official seal <input type="checkbox"/> Native American Tribal Document <input type="checkbox"/> U.S. Citizen ID Card (INS Form I-197) <input type="checkbox"/> Identification Card for use of Resident Citizen in the United States (Form I-179) <input type="checkbox"/> Employment authorization document issued by the Department of Homeland Security <input type="checkbox"/> Screenprint of UI screen <i>Current Claim Status</i> <input type="checkbox"/> UI award letter <input type="checkbox"/> Expedited Eligibility through RRES, RES, or TAA

Workforce Solutions Office Staff Signature

Print Name

Date

Addendum Instructions

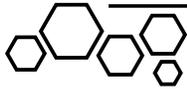
November 13, 2015

Child Care

Scholarship

Transportation

Other



Application for Financial Aid

SELF-CERTIFICATION

I hereby certify under penalty of perjury, that the following information is true:

I attest that the information stated above is true and accurate, and understand that the above information, if misrepresented or incomplete, may be grounds for immediate termination of Workforce Solutions services and/or penalties as specified by law.

Signature: _____ Date: ____/____/____

Signature of Parent or Legal Guardian: _____

Address: _____

Phone Number: _____

The above self-certification documents the following eligibility criteria:

CERTIFICATION

I certify that the information recorded on this form was provided by the individuals whose signatures appear above.

Workforce Solutions Career Office Staff Signature: _____

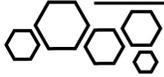
Printed Name: _____ Date: ____/____/____

Child Care

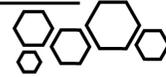
Scholarship

Transportation

Other



Employment/Income Verification



Date: _____

TO WHOM IT MAY CONCERN: This is authorization to release the information concerning the employment of _____

Please provide the gross income for the period from _____ to _____

We appreciate your cooperation and prompt return of this information.

Thank you,

Employee's Signature

Employee's Social Security Number

TO BE COMPLETED BY EMPLOYER

Employer's Name: _____

Street Address: _____

City: _____ State: _____ ZIP: _____

Telephone: _____

Employment Start Date: _____ End Date: _____

Pay Frequency: _____ Gross Monthly Salary /Rate of Pay: _____

Gross Wages from _____ to _____ \$

Usual Number of Weekly Hours: _____

Employer's Signature

Title

Date

PLEASE RETURN TO: Workforce Solutions: Financial Aid Support Center
Address: P.O. Box 924586
City, State, ZIP: Houston TX 77292
Attn: Call Center
Email: csc@wrksolutions.com

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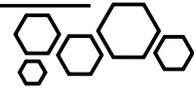
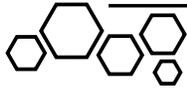
243-FA 11-E
06/18/15

Child Care

Scholarship

Transportation

Other



Application for Financial Aid

INCOME RECONSTRUCTION WORKSHEET

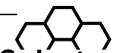
Use this form to reconstruct income received during 26-week income determination period when little or no documentation is available. Work backwards from the application date.

Income determination period: _____ / _____ to _____ / _____

Week #	From	To	Wage per Hour	X	Hours Worked	+	Other (i.e. Tips)	=	Total
1	/	/	\$	X		+		=	\$
2	/	/	\$	X		+		=	\$
3	/	/	\$	X		+		=	\$
4	/	/	\$	X		+		=	\$
5	/	/	\$	X		+		=	\$
6	/	/	\$	X		+		=	\$
7	/	/	\$	X		+		=	\$
8	/	/	\$	X		+		=	\$
9	/	/	\$	X		+		=	\$
10	/	/	\$	X		+		=	\$
11	/	/	\$	X		+		=	\$
12	/	/	\$	X		+		=	\$
13	/	/	\$	X		+		=	\$
14	/	/	\$	X		+		=	\$
15	/	/	\$	X		+		=	\$
16	/	/	\$	X		+		=	\$
17	/	/	\$	X		+		=	\$
18	/	/	\$	X		+		=	\$
19	/	/	\$	X		+		=	\$
20	/	/	\$	X		+		=	\$
21	/	/	\$	X		+		=	\$
22	/	/	\$	X		+		=	\$
23	/	/	\$	X		+		=	\$
24	/	/	\$	X		+		=	\$
25	/	/	\$	X		+		=	\$
26	/	/	\$	X		+		=	\$
Total estimated income received for the 26 week period									\$

I hereby attest that this is an accurate summary of income I received during this period.

Signature of Self-Employed _____ Date _____ / _____ / _____



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236-FA6-E
08-03-11

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Appendix A-17

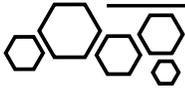
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Version 3.2-gc (24), 2/24/20

Child Care

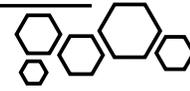
Scholarship

Transportation

Other



Application for Financial Aid



SELF-EMPLOYMENT INCOME VERIFICATION

The net self-employment income must be determined for the period beginning ____/____ and ending ____/____. IRS documents or the self-employed individual's profit loss statement for the income determination period may be used to document the net income. Where this information is not available, the self-employed individual must complete this worksheet covering the 26-week income determination period.

Applicant Name :		Application Date :		
Self-Employed Individual's Name :				
Relationship to Applicant :		Starting/Ending Dates of Business :		
Description of Business :				
Description of Operating Expenses of Business :				
From	To	Gross Receipts	Expenses	Net Income
		_____ - _____		\$ _____
		_____ - _____		\$ _____
		_____ - _____		\$ _____
		_____ - _____		\$ _____
		_____ - _____		\$ _____
		_____ - _____		\$ _____
		_____ - _____		\$ _____
		_____ - _____		\$ _____
		_____ - _____		\$ _____
		_____ - _____		\$ _____

I hereby attest that this is an accurate summary of my business income.

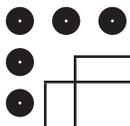
Signature of Self-Employed _____ Date ____ / ____ / ____

PHONE VERIFICATION

The above information was verified on this date by telephone (phone no: _____) with _____, who is the self-employed individual or representative thereof.

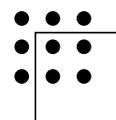
Staff Signature _____

Date ____ / ____ / ____



NOTES

APPENDIX B: JOB AIDS



VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Documentation verified in the TIERS system, sss.gov, or WIT must be stored in the document management system with other documentation. Documentation verified in TWIST does not need to be printed for the file. Indicate the method of verification in a TWIST Counselor Note.

Information should be recorded in Intake Common. If a Program Detail exists, also record on corresponding Program Detail screen.

NOTE: Other documentation sources may appear in the TWIST Documentation Source drop-down menu; however, the only allowable sources are those listed here.

General Eligibility			Twist Screens
Criteria	Qualification	Documentation	
Age <i>Not required for Dislocated Worker</i>	In-School Youth: Age 14 -21 At time of eligibility determination	<input type="checkbox"/> Birth certificate (preferred) <input type="checkbox"/> Official record showing date of birth <input type="checkbox"/> Baptismal record <input type="checkbox"/> DD-214, DD-215 Transfer/Discharge/Disability <input type="checkbox"/> Driver's license <input type="checkbox"/> Federal, state, or local government identification card <input type="checkbox"/> Hospital record of birth <input type="checkbox"/> Passport <input type="checkbox"/> Public assistance/social service records <input type="checkbox"/> School records <input type="checkbox"/> School identification card <input type="checkbox"/> Work permit <input type="checkbox"/> Native American tribal document <input type="checkbox"/> Other official document issued by a federal, state, or local government agency, such as discharge documents from the Texas Department of Criminal Justice with date of birth included	Intake Common- Identity
	Out-of-School Youth: Age 16-24 At time of eligibility determination		
	Adult: 18+		
Selective Service Registration	Males 18 years and older, born on or after 1/1/1960, must register for Selective Service no later than the day before their 26th birthday	<input type="checkbox"/> Selective Service System letter/registration letter <input type="checkbox"/> Internet verification/registration (http://www.sss.gov referenced in TWIST Counselor Notes) <input type="checkbox"/> Telephone verification (847) 688-6888 or toll free 1-888-665-1825 referenced in TWIST Counselor Notes) <input type="checkbox"/> DD-214, DD-215 Transfer/Discharge/Disability <input type="checkbox"/> Self certification, including any required documentation, maintained in the document management system and referenced in TWIST Counselor Notes	Intake Common- Characteristics

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

General Eligibility

Criteria	Qualification	Documentation	Twist Screens
<p>Eligible for Employment in the U.S.</p>	<p>Authorized to Work in the U.S.</p> <p>Requires:</p> <p>Authorization to Work checklist</p> <p>AND</p> <p>One item from list A</p> <p>OR</p> <p>One item from both list B and list C</p> <p>All items must be current and unexpired</p>	<p>List A</p> <p>Documents that Establish Both Identity and Employment Eligibility</p> <ul style="list-style-type: none"> <input type="checkbox"/> U.S. passport or U.S. passport card <input type="checkbox"/> Permanent resident card or alien registration receipt card (INS Form I-551) <input type="checkbox"/> Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa <input type="checkbox"/> Employment Authorization Document that contains a photograph (INS Form I-766) <input type="checkbox"/> In the case of a nonimmigrant alien authorized to work for a specific employer incident to status, a foreign passport with Form I-94 or Form I-94A bearing the same name as the passport and containing an endorsement of the alien's nonimmigrant status, as long as the period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form <input type="checkbox"/> Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI 	<p>List B</p> <p>Documents that Establish Identity</p> <ul style="list-style-type: none"> <input type="checkbox"/> Driver license or ID card issued by a state or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address <input type="checkbox"/> ID card issued by federal, state, or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address <input type="checkbox"/> School ID card with a photograph <input type="checkbox"/> Voter registration card <input type="checkbox"/> U.S. Military card or draft record <input type="checkbox"/> Military dependent's ID card <input type="checkbox"/> U.S. Coast Guard Merchant Mariner Card <input type="checkbox"/> Native American tribal document <input type="checkbox"/> Driver license issued by a Canadian government authority <input type="checkbox"/> For persons under age 18 who are unable to present a document listed above: <ul style="list-style-type: none"> <input type="checkbox"/> School record or report card <input type="checkbox"/> Clinic, doctor, or hospital record <input type="checkbox"/> Day care or nursery school record
<p>Eligible for Employment in the U.S.</p>	<p>Documents that Establish Employment Eligibility</p> <ul style="list-style-type: none"> <input type="checkbox"/> Social Security account Number card other than one that specifies on the face that the issuance of the card does not authorize employment in the United States <input type="checkbox"/> Certification of Birth Abroad issued by the Department of State (Form FS-240) <input type="checkbox"/> Certification of Report of Birth issued by the Department of State (Form DS-1350) <input type="checkbox"/> Original or certified copy of a birth certificate issued by a state, county, municipal authority, or territory of the United States bearing an official seal <input type="checkbox"/> Native American tribal document <input type="checkbox"/> U.S. Citizen ID Card (INS Form I-197) <input type="checkbox"/> ID Card for Use of Resident Citizen in the United States (INS Form I-179) <input type="checkbox"/> Employment Authorization Document issued by the U.S. Department of Homeland Security <input type="checkbox"/> Screen-print of Unemployment Insurance screen Current Claim Status <input type="checkbox"/> Unemployment Insurance award letter <input type="checkbox"/> Expedited Eligibility through TAA 	<p>List C</p> <p>Documents that Establish Employment Eligibility</p> <ul style="list-style-type: none"> <input type="checkbox"/> Social Security account Number card other than one that specifies on the face that the issuance of the card does not authorize employment in the United States <input type="checkbox"/> Certification of Birth Abroad issued by the Department of State (Form FS-240) <input type="checkbox"/> Certification of Report of Birth issued by the Department of State (Form DS-1350) <input type="checkbox"/> Original or certified copy of a birth certificate issued by a state, county, municipal authority, or territory of the United States bearing an official seal <input type="checkbox"/> Native American tribal document <input type="checkbox"/> U.S. Citizen ID Card (INS Form I-197) <input type="checkbox"/> ID Card for Use of Resident Citizen in the United States (INS Form I-179) <input type="checkbox"/> Employment Authorization Document issued by the U.S. Department of Homeland Security <input type="checkbox"/> Screen-print of Unemployment Insurance screen Current Claim Status <input type="checkbox"/> Unemployment Insurance award letter <input type="checkbox"/> Expedited Eligibility through TAA 	<p>Intake Common-Characteristics</p>

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Adult			Twist Screens
Criteria	Qualification	Documentation	
<p>General Eligibility</p>	<p style="text-align: center;"><i>Must meet and document all General Eligibility (see pages 1-2)</i></p> <p>Individual Status/ Family Size Required in conjunction with Individual/Family Income or to document a member of a family receiving public assistance to demonstrate low-income</p> <p>Disabled Individual <i>Must also determine income</i></p>	<p><input type="checkbox"/> Self certification per the Financial Aid Application</p> <p><input type="checkbox"/> Birth certificate</p> <p><input type="checkbox"/> Divorce decree</p> <p><input type="checkbox"/> Court documents</p> <p><input type="checkbox"/> Marriage certificate</p> <p>Note: A customer with a disability can be considered a "family of one" if his/her family income exceeds the income guidelines.</p> <p><input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes</p>	<p>Intake-Common Family Tab*</p> <p>Intake Common-Disability/Medical</p>
<p>Economic Eligibility <i>Only one qualification required</i></p>	<p>Income Determine family size. Then, use the family size to determine low income</p> <p>Note: Not required if using TANF, SNAP, SSI, Homeless, School Lunch, OR Foster Care to determine low income</p> <p>Note: Provide documentation for each applicable income source for each family member.</p>	<p><input type="checkbox"/> Alimony agreement</p> <p><input type="checkbox"/> Award letter from Veterans Affairs</p> <p><input type="checkbox"/> Bank statement</p> <p><input type="checkbox"/> Compensation award letter</p> <p><input type="checkbox"/> Employer statement/contact</p> <p><input type="checkbox"/> Family or business financial records</p> <p><input type="checkbox"/> Pay stubs</p> <p><input type="checkbox"/> Pension statement</p> <p><input type="checkbox"/> Public assistance records/printout</p> <p><input type="checkbox"/> Quarterly estimated tax for self-employed persons (Schedule C)</p> <p><input type="checkbox"/> Unemployment insurance documents and/or printout</p> <p><input type="checkbox"/> Court award letter</p> <p><input type="checkbox"/> Self-employment verification form</p> <p><input type="checkbox"/> Other official document issued by a federal, state, or local government agency such as the Texas Department of Housing and Community Affairs, indicating monetary amount of assistance</p> <p><input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes. (Use only if no other method is available.)</p>	<p>Intake-Common Income</p>

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Adult		
Criteria	Qualification	Documentation
General Eligibility	<i>Must meet and document all General Eligibility (see pages 1-2)</i>	
Economic Eligibility (cont.) <i>Only one qualification required</i>	An individual or family member* who is receiving TANF or has received TANF in the last 6 months	<input type="checkbox"/> TWIST TANF History screens <input type="checkbox"/> Copy of HHSC records (TIERS) <input type="checkbox"/> Copy of out-of-state HHSC/public assistance documentation referenced in TWIST Counselor Notes and maintained in the document management system <input type="checkbox"/> Documentation of receipt of TANF from an authorizing/distributing agency
	An individual or family member* who is receiving SNAP or has received SNAP in the last 6 months	<input type="checkbox"/> TWIST SNAP History screen <input type="checkbox"/> Copy of HHSC records (TIERS) <input type="checkbox"/> Documentation from an authorizing agency of receipt of SNAP <input type="checkbox"/> Telephone or written verification from HHSC
	An individual or family member* who is receiving SSI or has received SSI in the last 6 months	<input type="checkbox"/> Copy of authorization to receive cash public assistance <input type="checkbox"/> Public assistance record <input type="checkbox"/> Social Security benefits letter <input type="checkbox"/> Telephone verification
	An individual or family member* who is receiving other public assistance or has received other public assistance in the last 6 months	<input type="checkbox"/> Authorization to receive cash public assistance <input type="checkbox"/> Public assistance check <input type="checkbox"/> Medical card showing cash grant status <input type="checkbox"/> Refugee assistance records <input type="checkbox"/> Local cash assistance program
	Homeless	<input type="checkbox"/> WIT record or Self certification appearing in TWIST from WIT <input type="checkbox"/> Customer statement to staff entered in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Written statement from an individual or social service agency providing residence shelter referenced in TWIST Counselor Notes and maintained in the document management system
		Twist Screens
		Intake Common-Public Assistance
		Intake Common-Characteristics

*Based on the WIOA definition of family.

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Adult			Twist Screens
Criteria	Qualification	Documentation	
<i>General Eligibility</i>	<i>Must meet and document all General Eligibility (see pages 1-2)</i>		
Economic Eligibility (cont.) <i>Only one qualification required</i>	Foster Child	<input type="checkbox"/> Official document issued by a federal, state, local government agency <input type="checkbox"/> Court records	Intake Common-Characteristics
	Receives or is eligible to receive free or reduced-priced lunch	<input type="checkbox"/> School records	Intake Common-Characteristics
	Basic Skills Deficient	<input type="checkbox"/> Assessed by generally accepted standardized test (TABE) <input type="checkbox"/> School records	Intake Common-Characteristics and Assessments

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Dislocated Worker		
Criteria	Qualification	Documentation
Separating military service members	<ul style="list-style-type: none"> ● Recently separated, (within 48 months) discharged not dishonorably (voluntarily or involuntarily), and ● Non-retiree, and ● Unlikely to return to previous industry/occupation 	<input type="checkbox"/> DD-214 Certificate of Release or Discharge from Active Duty
Business closure/ Substantial layoff	Permanent closure or substantial layoff	<input type="checkbox"/> Notice of layoff <input type="checkbox"/> WARN notice <input type="checkbox"/> Telephone/written verification from employer
	<input type="checkbox"/> Notified of planned closure within 180 days of notice (employer or media) OR <input type="checkbox"/> Announcement by employer of facility closure with no planned date or a date beyond 180 days of closure	<input type="checkbox"/> Statement made to staff and referenced in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Customer's self-reported date of dislocation in WorkInTexas.com <input type="checkbox"/> TWIST Rapid Response list <input type="checkbox"/> Notice of layoff <input type="checkbox"/> Documentation from media <input type="checkbox"/> Documentation from state dislocated worker service <input type="checkbox"/> Employer verification <input type="checkbox"/> Telephone/written verification from employer
		Intake Common-Characteristics

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Dislocated Worker			Twist Screens
Criteria	Qualification	Documentation	
<i>General Eligibility</i>	<i>Must meet and document all General Eligibility (see pages 1-2)</i>		
Formerly self-employed and presently unemployed because of general economic conditions in the community where the customer resides, or because of a natural disaster	Formally self-employed AND	<input type="checkbox"/> Business license/permit <input type="checkbox"/> IRS records <input type="checkbox"/> TWC verification <input type="checkbox"/> Telephone or written verification from official source	Intake Common-Dislocated Worker
	Local economic conditions OR	<input type="checkbox"/> TWC labor market information <input type="checkbox"/> Unemployment rate <input type="checkbox"/> Other approved labor market analysis <input type="checkbox"/> Failure of business supplier <input type="checkbox"/> Failure of business customer <input type="checkbox"/> Depressed prices or market <input type="checkbox"/> Telephone/written verification from official source	
	Resides in area affected by natural disaster	<input type="checkbox"/> Federal state declaration of disaster with some proof that customer resided in the area (utility bill or other mail to address, Disaster Unemployment Insurance, other proof that meets the reasonable person test) <input type="checkbox"/> TWC declared disaster AND <input type="checkbox"/> Permanent dislocation as a result of the natural disaster <input type="checkbox"/> Telephone or written verification from official source	

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

		Dislocated Worker		
Criteria	Qualification	Documentation		Twist Screens
<i>General Eligibility</i>	<i>Must meet and document all General Eligibility (see pages 1-2)</i>			
Displaced Homemaker	<p>An individual who has provided unpaid services to family members in the home;</p> <p>AND</p> <p>is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment;</p> <p>AND</p> <p>has been dependent on the income of another family member but is no longer supported by that income</p> <p>OR</p> <p>Dependent spouse of a member of the Armed Forces on active duty whose family income is significantly reduced because of:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Deployment <input type="checkbox"/> Call or order to active duty <input type="checkbox"/> Permanent change of station <input type="checkbox"/> Service connected death or disability of the member 	<ul style="list-style-type: none"> <input type="checkbox"/> Customer statement to staff referenced in TWIST Counselor Notes <input type="checkbox"/> Self certification referenced in TWIST Counselor Notes and maintained in the document management system. 	Intake Common – Dislocated Worker	
Military Spouse	<p>Spouse of a member of the Armed Forces on active duty who:</p> <ul style="list-style-type: none"> <input type="checkbox"/> lost employment as a result of relocation of duty station, or <input type="checkbox"/> is unemployed or underemployed and having difficulty finding or upgrading employment 	<ul style="list-style-type: none"> <input type="checkbox"/> Self certification referenced in TWIST Counselor Notes and maintained in the document management system <input type="checkbox"/> Statement to staff documented in TWIST Counselor Notes 		

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth In School		
<i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i>		
Criteria	Qualification	Documentation
General Eligibility	<i>Must meet and document all General Eligibility (see pages 1-2)</i>	
School Attendance/ Status	<p>In School (14 - 21) Registered or in secondary or post-secondary school or the equivalent on the date eligibility is determined</p>	<p><input type="checkbox"/> School record(s)</p> <p><input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes</p> <p>Note: A youth is "attending school" if the youth is:</p> <ul style="list-style-type: none"> ● Enrolled in a public school, charter school, private school, or disciplinary alternative education program (DAEP); ● Home-schooled; ● Attending high school equivalency programs, including those considered to be dropout re-engagement programs, funded by the public K-12 system; ● A high school graduate who has registered for postsecondary classes, even if individual is not yet attending postsecondary classes; ● Attending postsecondary classes; or ● In between postsecondary school semesters and has registered for classes for a future semester or has paid all or part of the tuition for a future semester.
		Intake Common - Education

Note: Participation in the following programs is not considered being "in school" for the purpose of determining ISY/OSY status:

- Adult education programs provided under Title II of WIOA
- YouthBuild programs
- Job Corps programs
- High School Equivalency programs (not funded by the public K-12 system)
- Dropout reengagement programs (not funded by the public K-12 system)

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth In School			
<i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i>			
Criteria	Qualification	Documentation	
<i>General Eligibility</i>	<i>Must meet and document all General Eligibility (see pages 1-2)</i>	Twist Screens	
Economic Eligibility <i>Only one qualification required</i>	Individual Status/ Family Size Required in conjunction with Individual/ Family Income or to document a member of a family receiving public assistance to demonstrate low-income	<input type="checkbox"/> Self certification per the Financial Aid Application <input type="checkbox"/> Birth certificate <input type="checkbox"/> Decree of court <input type="checkbox"/> Divorce decree <input type="checkbox"/> Court Documents <input type="checkbox"/> Marriage certificate Note: A customer with a disability can be considered a "family of one" if his/her family income exceeds the income guidelines.	Intake-Common Family Tab*
	Income Determine family size. Then, use the family size to determine low income Note: Not required if using TANF, SNAP, SSI, Homeless, School Lunch, Lives in a high poverty census area, OR Foster Care to determine low income	<input type="checkbox"/> Alimony agreement <input type="checkbox"/> Award letter from Veterans Affairs <input type="checkbox"/> Bank statement <input type="checkbox"/> Compensation award letter <input type="checkbox"/> Employer statement/contact <input type="checkbox"/> Family or business financial records <input type="checkbox"/> Pay stubs <input type="checkbox"/> Pension statement <input type="checkbox"/> Public assistance records/printout <input type="checkbox"/> Quarterly estimated tax for self-employed persons (Schedule C) <input type="checkbox"/> Unemployment insurance documents and/or printout <input type="checkbox"/> Court award letter <input type="checkbox"/> Self-employment verification form <input type="checkbox"/> Other official document issued by a federal, state, or local government agency such as the Texas Department of Housing and Community Affairs, indicating monetary amount of assistance	Intake-Common Income
	Disabled Individual <i>Must also determine income</i>	<input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes	Intake Common-Characteristics

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth In School			Twist Screens
Criteria	Qualification	Documentation	
<p><i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i></p> <p><i>Must meet and document all General Eligibility (see pages 1-2)</i></p>			
General Eligibility Economic Eligibility (cont) <i>Only one qualification required</i>	An individual or family member* who is receiving TANF or has received TANF in the last 6 months	<input type="checkbox"/> TWIST TANF History screens <input type="checkbox"/> Copy of HHSC records (TIERS) <input type="checkbox"/> Copy of out-of-state HHSC/public assistance documentation <input type="checkbox"/> Documentation of receipt of TANF from an authorizing/distributing agency	Intake Common-Public Assistance
	An individual or family member* who is receiving SNAP or has received SNAP in the last 6 months.	<input type="checkbox"/> TWIST SNAP History screen <input type="checkbox"/> Copy of HHSC records (TIERS) <input type="checkbox"/> Documentation from an authorizing agency of receipt of SNAP <input type="checkbox"/> Telephone verification from HHSC	Intake Common-Public Assistance
	An individual or family member* who is receiving SSI or has received SSI in the last 6 months	<input type="checkbox"/> Copy of authorization to receive cash public assistance <input type="checkbox"/> Public assistance record <input type="checkbox"/> Social Security benefits letter <input type="checkbox"/> Telephone verification	Intake Common-Public Assistance
	An individual or family member* who is receiving other public assistance or has received other public assistance in the last 6 months	<input type="checkbox"/> Authorization to receive cash public assistance <input type="checkbox"/> Public assistance check <input type="checkbox"/> Medical card showing cash grant status <input type="checkbox"/> Refugee assistance records <input type="checkbox"/> Local cash assistance program	Intake Common-Public Assistance
	Foster Child	<input type="checkbox"/> Official document issued by a federal, state, local government agency <input type="checkbox"/> Court records	Intake Common-Characteristics

*Based on the WIOA definition of family.

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth In School		
<i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i>		
Criteria	Qualification	Documentation
<i>Must meet and document all General Eligibility (see pages 1-2)</i>		
General Eligibility Economic Eligibility (con't) <i>Only one qualification required</i>	Homeless	<input type="checkbox"/> WIT record or Self certification appearing in TWIST from WIT <input type="checkbox"/> Customer statement to staff entered in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Written statement from an individual or social service agency providing residence shelter referenced in TWIST Counselor Notes and maintained in the document management system
	Receives or is eligible to receive free or reduced-priced lunch	<input type="checkbox"/> School records
	Lives in a high poverty area.	<input type="checkbox"/> Proof of address AND <input type="checkbox"/> Internet verification of Census Tract low income status
	Basic Skills Deficient <i>Scored below 9.0 on standardized test (TABE)</i>	<input type="checkbox"/> Assessed by generally accepted standardized test (TABE) <input type="checkbox"/> School records
Youth Challenges to Employment	Homeless or Runaway	<input type="checkbox"/> WIT record or Self certification appearing in TWIST from WIT <input type="checkbox"/> Customer statement to staff entered in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Written statement from an individual or social service agency providing residence shelter referenced in TWIST Counselor Notes and maintained in the document management system

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth In School		
<i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i>		
Criteria	Qualification	Documentation
<i>Must meet and document all General Eligibility (see pages 1-2)</i>		
Youth Challenges to Employment (cont.)	Offender	<input type="checkbox"/> Statement made to staff and referenced on the Program Detail Characteristics tab and in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Documentation from criminal justice system (juvenile or adult) <input type="checkbox"/> Telephone/written verification with court representatives
	Disabled, including Learning Disabilities	<input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes
	English Language Learner	<input type="checkbox"/> Self certification referenced in TWIST Counselor Notes and maintained in the document management system.
		Twist Screens

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School		Documentation	Twist Screens
Criteria	Qualification		
General Eligibility	<p>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply. Must meet and document all General Eligibility (see pages 1-2)</p>		
School Attendance/ Status	<p>Out of School (16-24) School status is based on a determination of school attendance on the date of eligibility determination.</p>	<p><input type="checkbox"/> School record(s) <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes</p> <p>Note: A youth is "not attending" school if, on the date of eligibility determination, the individual:</p> <ul style="list-style-type: none"> ● Has had at least 10 consecutive days of unexcused absences and has not returned to school; ● Is not attending postsecondary school; ● Has not registered for postsecondary school classes; or ● Is enrolled only in non-credit-bearing postsecondary classes. 	Program Detail- Program Summary
Youth Challenges to Employment Economic Eligibility is not required, unless otherwise noted	Homeless or Runaway	<p><input type="checkbox"/> WIT record or Self certification appearing in TWIST from WIT <input type="checkbox"/> Customer statement to staff entered in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Written statement from an individual or social service agency providing residence shelter referenced in TWIST Counselor Notes and maintained in the document management system</p>	Intake Common- Characteristics
	Foster Care Youth or Aged Out of Foster Care	<p><input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Statement made to staff referenced in TWIST Counselor Notes</p>	Intake Common- Characteristics

Note: Participation in the following programs is not considered being "in school" for the purpose of determining ISY/OSY status:

- Adult education programs provided under Title II of WIOA
- YouthBuild programs
- Job Corps programs
- High School Equivalency programs (not funded by the public K-12 system)
- Dropout reengagement programs (not funded by the public K-12 system)

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School			Twist Screens
Criteria	Qualification	Documentation	
General Eligibility	Must meet and document all General Eligibility (see pages 1-2)		
Youth Challenges to Employment (cont.) <i>Economic Eligibility is not required, unless otherwise noted</i>	Pregnant or Parenting <i>Age is not a factor</i>	Pregnant: <ul style="list-style-type: none"> <input type="checkbox"/> Customer statement to staff noted in TWIST Counselor Notes <input type="checkbox"/> Staff observation noted in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes Parenting: <ul style="list-style-type: none"> <input type="checkbox"/> Birth certificate (preferred) <input type="checkbox"/> Baptismal record <input type="checkbox"/> Hospital record of birth <input type="checkbox"/> Public assistance/social service records <input type="checkbox"/> School records <input type="checkbox"/> HHS TANF or SNAP screen-print showing the individual and child <input type="checkbox"/> Other official document issued by a state or local government agency or court which demonstrates the individual is the child's parent or legal guardian, such as a copy of a signed Acknowledgment of Paternity form that has been filed with the Bureau of Vital Statistics or a copy of legal documents indicating guardianship or adoption <input type="checkbox"/> Stepparent - Copy of an official document issued by a state or local government agency or court that names the child and the child's parent such as a birth certificate or adoption record and proof of marriage to the child's parent such as their marriage certificate or common law marriage certificate 	Intake Common-Characteristics
	Offender	<ul style="list-style-type: none"> <input type="checkbox"/> Statement made to staff and referenced on the Program Detail Characteristics tab and in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Documentation from criminal justice system (juvenile or adult) <input type="checkbox"/> Telephone/written verification with court representatives 	Intake Common-Characteristics

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School		
<p>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</p>		
Criteria	Qualification	Documentation
General Eligibility		
Must meet and document all General Eligibility (see pages 1-2)		
Youth Challenges to Employment (cont.) <i>Economic Eligibility is not required, unless otherwise noted</i>	Disabled, including Learning Disabilities	<input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes
	Of school age (6-18), but has not attended school in most recent school year calendar quarter* <i>*Last three month period</i>	<input type="checkbox"/> School records <input type="checkbox"/> Self certification referenced in TWIST Counselor Notes and maintained in the document management system.
	Dropout	<input type="checkbox"/> Self certification referenced in TWIST Counselor Notes and maintained in the document management system. <input type="checkbox"/> School attendance record <input type="checkbox"/> School dropout letter <input type="checkbox"/> Telephone/written verification from official source
		Twist Screens Intake Common-Disability/Medical Program Detail -Exemptions Intake Common-Education Intake Common-Education

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School		
<i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i>		
Criteria	Qualification	Documentation
General Eligibility	<i>Must meet and document all General Eligibility (see pages 1-2)</i>	
Youth Challenges to Employment (cont.) <i>Must also be economically eligible</i>	Has high school diploma AND	High school diploma: <input type="checkbox"/> School records <input type="checkbox"/> Copy of diploma
	Is basic skills deficient <i>Scored below 9.0 on standardized test (TABE)</i> OR	Basic skills deficient: <input type="checkbox"/> Assessed by generally accepted standardized test (TABE) <input type="checkbox"/> School Records
	Is an English Language Learner AND	English language learner: <input type="checkbox"/> Self certification referenced in TWIST Counselor Notes and maintained in the document management system.
	IS Economically Eligible	Economically Eligible <input type="checkbox"/> Use one method to prove economic eligibility from pages 21+22
		Twist Screens Intake Common - Education Intake Common - Characteristics Intake Common - Characteristics Intake Common

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School	
Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.	
Criteria	Documentation
General Eligibility	Twist Screens
<p>Youth Challenges to Employment (cont.) Must also be economically eligible</p>	<p>Individuals who are economically eligible and require additional assistance to complete an educational program, or to secure and hold employment. Must also be economically eligible. For each qualification, explain why the customer needs the additional assistance in TWIST Counselor Notes.</p>
	<p>Board Designated Categories</p> <p>An individual, determined by a public or private agency as requiring additional assistance to complete an educational program or to secure and retain employment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Letter from child study team stating specific disability <input type="checkbox"/> Medical records <input type="checkbox"/> School records <input type="checkbox"/> Referral from a public or private agency (i.e., WFS) <input type="checkbox"/> Copy of test results <p>A dependent member of a single parent family.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Document family and relationship <input type="checkbox"/> Self certification / Financial aid application
	<p>Program Detail-Exemptions</p> <p>Counselor Notes</p> <p>Intake Common - Family</p>

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School		
<i>Note: School attendance and school status determine which eligibility definition (SY or OSY) may apply.</i>		
Criteria	Qualification	Documentation
General Eligibility	<i>Must meet and document all General Eligibility (see pages 1-2)</i>	Twist Screens
Youth Challenges to Employment (cont.) <i>Must also be economically eligible</i>	<p>Lacks a significant work history* and needs additional assistance to secure and retain employment.</p> <p><i>*Has not worked for same employer, full or part-time, for a minimum of 3 of the last 12 months</i></p>	<p><input type="checkbox"/> Wage records</p> <p><input type="checkbox"/> Self certification documented in TWIST Counselor Notes and maintained in the document management system</p>
	<p>Failed all or part of the standardized test required for graduation and needs additional assistance to complete an educational program</p>	<p><input type="checkbox"/> School records</p> <p><input type="checkbox"/> Copy of test results</p>
	Board Designated Categories	<p>Intake Common - Employment Status</p> <p>Counselor Notes</p>
		<p>Intake Common - Education</p> <p>Counselor Notes</p>

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School			
<i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i>			
Criteria	Qualification	Documentation	
<i>General Eligibility</i>	<i>Must meet and document all General Eligibility (see pages 1-2)</i>	Twist Screens	
	<p>Individual Status/ Family Size Required in conjunction with Individual/ Family Income or to document a member of a family receiving public assistance to demonstrate low-income</p>	<input type="checkbox"/> Self certification per the Financial Aid Application <input type="checkbox"/> Birth certificate <input type="checkbox"/> Decree of court <input type="checkbox"/> Divorce decree <input type="checkbox"/> Court Documents <input type="checkbox"/> Marriage certificate <p><i>Note: A customer with a disability can be considered a "family of one" if his/her family income exceeds the income guidelines.</i></p>	Intake-Common Family Tab*
<p>Economic Eligibility <i>Only one qualification required</i></p>	<p>Income Determine family size. Then, use the family size to determine low income <i>Note: Not required if using TANF, SNAP, SSI, Homeless, School Lunch, Lives in a high poverty census area, OR Foster Care to determine low income</i></p>	<input type="checkbox"/> Alimony agreement <input type="checkbox"/> Award letter from Veterans Affairs <input type="checkbox"/> Bank statement <input type="checkbox"/> Compensation award letter <input type="checkbox"/> Employer statement/contact <input type="checkbox"/> Family or business financial records <input type="checkbox"/> Pay stubs <input type="checkbox"/> Pension statement <input type="checkbox"/> Public assistance records/printout <input type="checkbox"/> Quarterly estimated tax for self-employed persons (Schedule C) <input type="checkbox"/> Unemployment insurance documents and/or printout <input type="checkbox"/> Court award letter <input type="checkbox"/> Self-employment verification form <input type="checkbox"/> Other official document issued by a federal, state, or local government agency such as the Texas Department of Housing and Community Affairs, indicating monetary amount of assistance	Intake-Common Income

*Based on the WIOA definition of family.

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School		
<i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i>		
Criteria	Qualification	Documentation
General Eligibility	<i>Must meet and document all General Eligibility (see pages 1-2)</i>	Twist Screens
	<p>An individual or family member* who is receiving TANF or has received TANF in the last 6 months</p> <p><input type="checkbox"/> TWIST TANF History screens <input type="checkbox"/> Copy of HHSC records (TIERS) <input type="checkbox"/> Copy of out-of-state HHSC/public assistance documentation <input type="checkbox"/> Documentation of receipt of TANF from an authorizing/distributing agency</p>	Intake-Common Public Assistance
	<p>An individual or family member* who is receiving SNAP or has received SNAP in the last 6 months.</p> <p><input type="checkbox"/> TWIST SNAP History screen <input type="checkbox"/> Copy of HHSC records (TIERS) <input type="checkbox"/> Documentation from an authorizing agency of receipt of SNAP <input type="checkbox"/> Telephone verification from HHSC</p>	Intake Common-Public Assistance
Economic Eligibility (cont.)	<p>An individual or family member* who is receiving SSI or has received SSI in the last 6 months</p> <p><input type="checkbox"/> Copy of authorization to receive cash public assistance <input type="checkbox"/> Public assistance record <input type="checkbox"/> Social Security benefits letter <input type="checkbox"/> Telephone verification</p>	Intake Common-Public Assistance
	<p>An individual or family member* who is receiving other public assistance or has received other public assistance in the last 6 months</p> <p><input type="checkbox"/> Authorization to receive cash public assistance <input type="checkbox"/> Public assistance check <input type="checkbox"/> Medical card showing cash grant status <input type="checkbox"/> Refugee assistance records <input type="checkbox"/> Local cash assistance program</p>	Intake Common-Public Assistance

*Based on the WIOA definition of family.

Note: Participation in the following programs is not considered being "in school" for the purpose of determining ISY/OSY status:

- Adult education programs provided under Title II of WIOA
- YouthBuild programs
- Job Corps programs
- High School Equivalency programs (not funded by the public K-12 system)
- Dropout reengagement programs (not funded by the public K-12 system)

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Youth Out of School		
<i>Note: School attendance and school status determine which eligibility definition (ISY or OSY) may apply.</i>		
Criteria	Qualification	Documentation
<i>Must meet and document all General Eligibility (see pages 1-2)</i>		
General Eligibility Economic Eligibility (cont.) <i>Only one qualification required</i>	Foster Child	<input type="checkbox"/> Official document issued by a federal, state, local government agency <input type="checkbox"/> Court records
	Lives in a high poverty area	<input type="checkbox"/> Proof of address AND <input type="checkbox"/> Internet verification of Census Tract low income status
	Receives or is eligible to receive free or reduced priced lunch.	<input type="checkbox"/> School Records Note: Out-of-school may use this qualification if the youth is: <ul style="list-style-type: none"> ● a parent, ● living in the same household as a child receiving or eligible to receive free or reduced-price lunch, based on income.
Twist Screens		
		Intake Common-Characteristics Intake Common-Characteristics

Note: Participation in the following programs is not considered being "in school" for the purpose of determining ISY/OSY status:

- Adult education programs provided under Title II of WIOA
- YouthBuild programs
- Job Corps programs
- High School Equivalency programs (not funded by the public K-12 system)
- Dropout reengagement programs (not funded by the public K-12 system)

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Childcare			
Criteria	Qualification	Documentation	TWIST Screens
Child's Age	Under 13, or Under 19 if disabled	<input type="checkbox"/> Birth certificate <input type="checkbox"/> Current U.S. passport <input type="checkbox"/> Hospital record of birth <input type="checkbox"/> Church or baptismal record <input type="checkbox"/> Public assistance/social service records <input type="checkbox"/> School records <input type="checkbox"/> School identification card <input type="checkbox"/> Native American tribal document <input type="checkbox"/> Adoption papers or records <input type="checkbox"/> Child support paternity records <input type="checkbox"/> Divorce or court custody decrees	Intake Common – Family > Household Dependents
	Disability	<input type="checkbox"/> Supplemental Security Income (SSI) benefits statement <input type="checkbox"/> DARS Early Childhood Intervention (ECI) program contact <input type="checkbox"/> Head Start contact that identifies the child as having a disability <input type="checkbox"/> Public school special education services, including PPCD, contact <input type="checkbox"/> Statement or letter from a qualified clinician	Intake Common – Family > Household Dependents
Child's Citizenship/ Immigration Status	Child must be a U.S. citizen or legal immigrant <i>Note: A parent's citizenship or immigration status is not required for eligibility.</i>	<p>Citizenship:</p> <input type="checkbox"/> Birth certificate <input type="checkbox"/> Current U.S. passport <input type="checkbox"/> Hospital record of birth <input type="checkbox"/> Church or baptismal record <input type="checkbox"/> Public assistance/social service records	Intake Common – Family > Household Dependents
		<p>Legal Immigrant/Qualified Alien:</p> <input type="checkbox"/> Immigration form I-551 (AKA "green card") <input type="checkbox"/> Immigration form I-94, stamped with applicable rule citation(s) <input type="checkbox"/> Immigration form I-571 (Refugee Travel Document) <input type="checkbox"/> Order from immigration judge <input type="checkbox"/> Cuban/Haitian passport showing 501(e) <input type="checkbox"/> USCIS petition and supporting documents	

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Childcare			
Criteria	Qualification	Documentation	TWIST Screens
<p>Family has Low Income Documentation should be provided for each applicable income source from each family member</p>	<p>Individual Status/Family Size <i>Required in conjunction with Family Income</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Self certification per the Financial Aid Application <input type="checkbox"/> Birth certificate <input type="checkbox"/> Divorce decree <input type="checkbox"/> Court documents <input type="checkbox"/> Marriage certificate <input type="checkbox"/> Person standing in loco parentis (refer to the In Loco Parentis Desk Aid for allowable documentation) 	<p>Intake Common – Family > Household Dependents</p>
	<p>Family Income</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Pay stubs <input type="checkbox"/> Employment/Income Verification form <input type="checkbox"/> Homelessness determination – Residency Information form <input type="checkbox"/> Workers Compensation documentation/statement <input type="checkbox"/> SSDI statement <input type="checkbox"/> Retirement/Pension statement <input type="checkbox"/> Quarterly estimated tax for self-employed persons (Schedule C) <input type="checkbox"/> Self-employment Verification form <input type="checkbox"/> Family or business financial records <input type="checkbox"/> Award letter from Veterans Affairs <input type="checkbox"/> Bank statement <input type="checkbox"/> Compensation award letter <input type="checkbox"/> IRS form 1099-DIV, -INT, for dividends or interest <input type="checkbox"/> IRS form 1040 Schedule D for capital gains 	<p>Intake Common – Income</p>
	<p>Homeless</p>	<ul style="list-style-type: none"> <input type="checkbox"/> WIT record or Self certification appearing in TWIST from WIT <input type="checkbox"/> Customer statement to staff entered in TWIST Counselor Notes <input type="checkbox"/> Self certification maintained in the document management system and referenced in TWIST Counselor Notes <input type="checkbox"/> Written statement from an individual or social service agency providing residence shelter referenced in TWIST Counselor Notes and maintained in the document management system 	<p>Intake Common-Characteristics</p>

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Childcare			
Criteria	Qualification	Documentation	TWIST Screens
Resident of the Workforce Board Area	Applicant and child are residents of the Gulf-Coast 13-county region	<input type="checkbox"/> Copy of current utility bill <input type="checkbox"/> Pay stub (if address is printed on stub) <input type="checkbox"/> Rent receipt (showing current address) <input type="checkbox"/> Lease agreement <input type="checkbox"/> Mortgage statement <input type="checkbox"/> School record showing proof of residency (in the Gulf Coast 13-county region) <input type="checkbox"/> Section 8 award letter <input type="checkbox"/> Homelessness determination – Discussion documented in TWIST <input type="checkbox"/> Public assistance/social service records <input type="checkbox"/> Financial aid application to document address and one of the above documentation sources from the owner/lessee. <i>Managers and Supervisors may review and accept alternative documentation, including Self certification, when the preponderance of evidence points to the customer meeting the eligibility criterion.</i>	Intake Common - Identity
Reason for Financial Aid for Child Care	Parent/guardian must be working or going to school, or a combination of both, at least 25 hours per week.	<p>Employment</p> <input type="checkbox"/> Pay stubs with hours worked <input type="checkbox"/> Employment/Income Verification form <input type="checkbox"/> Self-employment verification form <input type="checkbox"/> Financial records for self-employed persons <input type="checkbox"/> Quarterly estimated tax for self-employment (Schedule C)	Intake Common - Family
		<p>Education</p> <input type="checkbox"/> Transcript from education or training program <input type="checkbox"/> Statement from education or training provider <input type="checkbox"/> Tuition statement with semester hours <input type="checkbox"/> Admissions letter <input type="checkbox"/> Other official document from an education or training provider confirming current enrollment	

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Child Care - In Loco Parentis

	Documentation Verifying Reason Parent is Unavailable	Documentation Verifying Caretaker is Responsible for the Child
<p>Medical Incapacitation or In Treatment or Rehabilitation</p>	<p><input type="checkbox"/> A document from a licensed medical professional, e.g., physician, psychiatrist, or psychologist, stating the medical condition that makes the parent unable to care for his or her children;</p> <p><input type="checkbox"/> A document from a licensed professional such as a counselor or therapist as long as the recommendation or diagnosis does not exceed the licensed professional's authority;</p> <p><input type="checkbox"/> A letter from a facility verifying admission of the parent signed by an authorized representative of a treatment or rehabilitation center. The letter must include both the admission and anticipated release date. (A copy of the order mandating the placement will suffice.)</p>	<p>Notarized power of attorney or a sworn affidavit of temporary custody/guardianship of the child.</p>
<p>CPS Placement</p>	<p><input type="checkbox"/> A recent (within six months) CPS safety plan or CPS placement agreement;</p> <p><input type="checkbox"/> A court order naming the individual as the caretaker; OR</p> <p><input type="checkbox"/> A letter from CPS that confirms the children's placement with the caretaker is ongoing.</p>	<p>No other documentation is necessary.</p>
<p>Military Deployment</p>	<p><input type="checkbox"/> Military orders;</p> <p><input type="checkbox"/> A suitable alternative such as a confirmation by the base commander or other military official.</p>	<p>A military power of attorney appointing the caretaker as the guardian of the child;</p> <p>In lieu of a military power of attorney, a military family plan that gives the caretaker the authority to execute decisions on child care matters.</p>
<p>Incarcerated</p>	<p><input type="checkbox"/> A "commitment" order from the court;</p> <p><input type="checkbox"/> Verification from the Texas Department of Criminal Justice (TDCJ) Offender Information Search database; (http://www.tdcj.state.tx.us/offender_information.htm) for offenders who are incarcerated in a TDCJ facility;</p> <p><input type="checkbox"/> A letter from the sheriff's office confirming incarceration if the parent is in a local jail.</p> <p><input type="checkbox"/> The document must include the date of incarceration and anticipated release date.</p>	<p>A caretaker must have a notarized power of attorney or a sworn affidavit of temporary custody/guardianship of the child.</p>

VALIDATING AND ENTERING QUALIFICATIONS FOR WORKFORCE SOLUTIONS FINANCIAL AID

Child Care - In Loco Parentis	
Documentation Verifying Reason Parent is Unavailable	Documentation Verifying Caretaker is Responsible for the Child
<p>A sworn affidavit of facts attesting to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The circumstances of how and why the caretaker assumed responsibility for the child; <input type="checkbox"/> The whereabouts of the natural parent(s); <input type="checkbox"/> The caretaker's relationship to the child; and <input type="checkbox"/> The length of time the child has been with the caretaker <p style="text-align: center;">Other Reasons Parent or Legal Guardian is Unavailable</p>	<p>A caretaker must have a notarized power of attorney or a sworn affidavit of temporary custody/guardianship of the child.</p> <p>In addition, the caretaker must have documentation from a verifiable source that establishes his or her parental responsibility for the child. The documentation may be one of the following:</p> <ol style="list-style-type: none"> 1. The caretaker's most recent listing child as a dependent; 2. A letter from a child care center or other independent, non-relative, verifiable source that can establish the individual's parental and financial responsibility for the child; 3. A letter from an independent school district; OR 4. Documentation that the caretaker is receiving Temporary Assistance for Needy Families benefits on behalf of the child, OR has received benefits within the past six months.



Financial Aid Income Guidelines

Workforce Solutions uses multiple sets of income guidelines when determining eligibility for our income-tested financial aid funds. “Income-tested” means that a person must have an income at or below a certain level to be eligible for the aid or to determine customer contribution to aid.

We use the income guidelines to determine which income-tested funds we can use to provide substantial financial aid for education & training scholarships, education support, work support and job search support.

Staff must use the most current guidelines when determining eligibility.

Workforce Solutions has the following income-tested funds available for financial aid:

WIOA Adult	Child Care & Development Fund
WIOA Youth	Child Care Local Match Fund

Workforce Solutions financial aid income guidelines apply the 2020 Poverty Guidelines, the 2019 Lower Living Standard Income Level Guidelines and the 2018-2019 State Median Income Guidelines as appropriate for the identified fund. There is special guidance for applying Income Guidelines for child care financial aid on page 9 of this document.

Following is a summary of eligibility requirements for income-tested funds:

Income-Tested Fund	Age & Other	Work Status	Selective Service	Income & Other
WIOA Adult	18 years or older	Authorized to work in U.S.	If male, registered as required	<p>Family income at or below 100% of poverty line or 70% lower living standard or is at or below 200% of poverty line when funds are available.</p> <p>Income test not required if customer meets one of the following criteria</p> <ol style="list-style-type: none"> 1. Customer receives or is a member of a family that receives (currently or in the past six months) one of the following: TANF, SNAP, SSI, or other public assistance; or 2. Is a Foster Child; or 3. Is Homeless; or 4. Receives or is eligible to receive free or reduced-price lunch; <u>or</u> 5. Is Deficient in Basic Skills <p>Note: customer with a disability must be determined a family of one for income determination purpose if the customer's family does not meet the income test and 1 through 5 above do not apply.</p>
WIOA Dislocated Worker	There is no age limit.	<p>Authorized to work in U.S., and</p> <ol style="list-style-type: none"> 1. Terminated or laid off, eligible for or exhausted UI and unlikely to return to industry or occupation; <u>or</u> 2. Lost job from permanent closure or substantial layoff of a plant, facility or enterprise; <u>or</u> 3. Was self-employed and now unemployed because of economic conditions or natural disaster; <u>or</u> 4. Displaced Homemaker; <u>or</u> 5. Spouse of a member of Armed Forces who lost employment due to permanent change in duty station or is unemployed, underemployed and has difficulty finding or upgrading employment 	If male, registered as required	<p>Income test not required for eligibility</p>

Income-Tested Fund	Age & Other	Work Status	Selective Service	Income & Other
WIOA In-School Youth	<p>A. 14-21 years old at eligibility determination, and</p> <p>B. Attending or enrolled in secondary or for-credit postsecondary school at eligibility determination, <u>and</u></p> <p>C. Low-Income, <u>and</u></p> <p>D. At least one of the following apply</p> <ol style="list-style-type: none"> 1. Deficient in Basic Literacy Skills; <u>or</u> 2. Homeless, Runaway; <u>or</u> 3. In foster care or aged out of foster care; <u>or</u> 4. Pregnant/Parenting; <u>or</u> 5. Offender; <u>or</u> 6. Has a disability; <u>or</u> 7. An English language learner who is deficient in Basic Literacy Skills. 	Authorized to work in U.S.	If male, registered as required	<p>Family income at or below 100% of poverty line or 70% lower living standard. Income test not required if customer meets one of the following criteria</p> <ol style="list-style-type: none"> 1. Customer receives or is a member of a family that receives (currently or in the past six months) one of the following: <ul style="list-style-type: none"> TANF, SNAP, SSI, or other public assistance; or Is a Foster Child; or Is Homeless; or Receives or is eligible to receive free or reduced-price lunch; or Lives in a high poverty census tract. <p>Note: customer with a disability must be determined a family of one for income determination purpose if the customer's family does not meet the income test and 1 through 5 above do not apply.</p>
WIOA Out-of-School Youth	<p>A. 16-24 years old at eligibility determination, <u>and</u></p> <p>B. Not attending or enrolled in secondary or for-credit postsecondary school at eligibility determination <u>and</u></p> <p>C. At least one of the following apply</p> <ol style="list-style-type: none"> 1. School Dropout; <u>or</u> 2. Youth who (a) received HS Diploma/equivalent and (b) is low-income and (c) is Deficient in Basic Literacy Skills or is an English language learner; <u>or</u> 3. Required to attend school but has not attended for at least the most recent complete school year's calendar quarter; <u>or</u> 4. Homeless or Runaway; <u>or</u> 5. In foster care or aged out of foster care; <u>or</u> 6. Pregnant/Parenting; <u>or</u> 7. Subject to the juvenile or adult justice system; <u>or</u> 8. Has a disability; <u>or</u> 9. Requires additional assistance to complete an educational program, or to secure and hold employment (must also meet low income requirements) 	Authorized to work in U.S.	If male, registered as required	<p>Note: OSY customers can attend and/or be enrolled in a non-credit postsecondary school at eligibility determination.</p> <p>OSY customers 21-24 years old are not subject to in-school educational requirements.</p> <p>Low income required only if using C. 2. or C. 9. from "Age & Other" column</p> <p>Family income at or below 100% of poverty line or 70% lower living standard. Income test not required if customer is</p> <ol style="list-style-type: none"> 1. Customer receives or is a member of a family that receives (currently or in the past six months) one of the following: <ul style="list-style-type: none"> TANF, SNAP, SSI, or other public assistance; or Is a Foster Child; or Is Homeless; or Lives in a high poverty census tract.

Income-Tested Fund	Age & Other	Work Status	Selective Service	Income & Other
Child Care & Development Fund	Parents, including teenage parents; legal guardians of minor children	Working or attending school at least 25 hours per week	NA	Family income is at or below 200% of poverty line at initial eligibility and does not exceed 85% of state median income
Child Care Local Match Fund	Parents, including teenage parents; legal guardians of minor children	Working or attending school at least 25 hours per week at a designated local match participating site	NA	Family income does not exceed 85% of the State Median Income



Financial Aid Income Guidelines

WIOA Adult

Effective: January 17, 2020

Family Size – Number of Persons in the Family	Annualized Income – Low Income	Annualized Income – Self-Sufficiency
One	\$12,760	\$25,520
Two	\$17,240	\$34,480
Three	\$21,720	\$43,440
Four	\$26,779	\$52,400
Five	\$31,606	\$61,360
Six	\$36,964	\$70,320
Seven	\$42,322	\$79,280
Eight	\$47,680	\$88,240
For each additional family member add this amount	<u>\$5,358</u>	<u>\$8,960</u>



Financial Aid Income Guidelines

WIOA Youth

Effective: January 17, 2020

Family Size – Number of Persons in the Family	Annualized Income
One	\$12,760
Two	\$17,240
Three	\$21,720
Four	\$26,779
Five	\$31,606
Six	\$36,964
Seven	\$42,322
Eight	\$47,680
For each additional family member add this amount	<u>\$5,358</u>

Financial Aid Income Guidelines –
January 27, 2020
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Financial Aid Income Guidelines

Child Care & Development Fund and Local Match

Effective from October 1, 2019 through September 30, 2020

Family Size – Number of Persons in the Family	Gross Monthly Income	
	Initial Eligibility 200% FPG	Sustaining Eligibility 85% SMI
Two	\$2,818	\$3,775
Three	\$3,555	\$4,663
Four	\$4,292	\$5,552
Five	\$5,028	\$6,440
Six	\$5,765	\$7,328
Seven	\$6,502	\$7,495
Eight	\$7,238	\$7,661
Nine *	\$7,828*	\$7,828
Ten *	\$7,994*	\$7,994
Eleven *	\$8,161*	\$8,161
Twelve *	\$8,327*	\$8,327
Thirteen *	\$8,494*	\$8,494
Fourteen *	\$8,660*	\$8,660
Fifteen *	\$8,827*	\$8,827

* Initial Eligibility amounts adjusted to prevent exceeding Sustaining Eligibility amounts.



Guidance for Applying Income Guidelines for Child Care Financial Aid

We use TWIST to record and process applications for financial aid for child care.

1. There are separate Initial Eligibility and Sustaining Eligibility income levels for customers applying for the general Income [Eligible/At Risk and Local Match](#) financial aid.
2. [Customers initially applying must meet the Initial Eligibility income requirement to receive financial assistance for child care. At recertification, a customer's income cannot exceed sustaining income limits to continue receiving financial assistance for child care.](#)
3. Income eligibility limits are set in TWIST. Because TWIST can only store one eligibility rule, we use the following process for determining customers eligible for both Low Income and Local Match financial aid:
 - a. TWIST will store the Local Match eligibility rule – that is the Sustaining Eligibility level or 85% State Median Income. TWIST will mark applicants with incomes below 85% of the State Median Income as eligible.
 - b. Staff must take the additional step of manually testing a customer's monthly gross income against our Initial Eligibility guideline for customers applying for Income Eligible or Local Match financial aid.
 - c. If a customer applying for Income [Eligible or Local Match](#) financial aid is above the Initial Eligibility level but below the Sustaining Level, the individual is not eligible for Workforce Solutions assistance, even though TWIST may show him or her as eligible.
 - d. Process applications for Income [Eligible or Local Match](#) financial only for those individuals whose income staff have manually determined falls at or below the Initial Eligibility level.



Financial Aid Income Guidelines

Workforce Solutions uses multiple sets of income guidelines when determining eligibility for our income-tested financial aid funds. “Income-tested” means that a person must have an income at or below a certain level to be eligible for the aid or to determine customer contribution to aid.

We use the income guidelines to determine which income-tested funds we can use to provide substantial financial aid for education & training scholarships, education support, work support and job search support.

Staff must use the most current guidelines when determining eligibility.

Workforce Solutions has the following income-tested funds available for financial aid:

WIOA Adult

Child Care & Development Fund

WIOA Youth

Child Care Local Match Fund

Workforce Solutions financial aid income guidelines apply the 2020 Poverty Guidelines, the 2019 Lower Living Standard Income Level Guidelines and the 2018-2019 State Median Income Guidelines as appropriate for the identified fund. There is special guidance for applying Income Guidelines for child care financial aid on page 9 of this document.

Following is a summary of eligibility requirements for income-tested funds:

Financial Aid Income Guidelines –
January 27, 2020
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WFS Funding Stream / Services Matrix

	Child Care	Work Support <ul style="list-style-type: none"> - Clothing - Tools - Emergency Housing - Transportation - Other 	Scholarships <ul style="list-style-type: none"> - Tuition/Fees - Books - Other 	Other <ul style="list-style-type: none"> - Translation Services
Child Care & Development	✓			
Local Match Child Care	✓			
SNAP	✓	✓	✓	
TANF		✓	✓	
TANF/Choices NCP		✓	✓	
Trade Act			✓	
Wagner-Peysner				✓
WIOA-Adult	✓	✓	✓	
WOA-Dislocated Worker	✓	✓	✓	
WIOA-Youth In-school	✓	✓	✓	
WIOA-Youth Out-of-school	✓	✓	✓	

Financial Aid Limits by Type of Assistance

Category of Assistance Requested	WFS Short-term		WFS Substantial Assistance	
	Type	Limits	Type	Limits
	Available in Types marked below.	Short-term Assistance is one-time assistance limited to \$200.	Available in Types marked below.	All limits apply to a 12-month period beginning October and ending September the following year.
Child Care	Does Not Apply		Work Support Work Search Education Support	No individual customer limit
Education <ul style="list-style-type: none"> - Tuition - Fees (including testing, parking, & other ordinary school fees) - Books - Supplies required by the school of all students in a like curriculum including: paper, pens, internet access, computer/laptop, printer, etc. - May include other expenses required by the school of all students in a like curriculum. <p>Note: Any of the other types of financial aid subject to applicable restrictions listed in this chart may be used to support customers receiving education support from Workforce Solutions.</p> <p>Note: Financial assistance for Education is limited to training authorized by Workforce Solutions.</p>	Does Not Apply		Education Support	Limits apply to a 12-month period. The costs of these services are included in the total available for a Workforce Solutions scholarship. Other limits do not apply. <ul style="list-style-type: none"> - Up to \$3,000 for basic skills training - Up to \$6,000 for career training - Up to \$6,000 for career advancement training

Financial Aid Limits by Type of Assistance

Category of Assistance Requested	WFS Short-term Assistance		WFS Substantial Assistance	
	Type	Limits	Type	Limits
Transportation Personal Expenses – Gas, bus fare/passes, other Vehicular Expenses ² – Car insurance (liability), Vehicle registration, Vehicle safety inspection ³ – Car repair/maintenance, Consumables ²	Available in Types marked below.	Short-term Assistance is one-time assistance limited to \$200.	Available in Types marked below.	All limits apply to a 12-month period beginning October and ending September the following year.
	Work Support	Personal Transportation Expenses are based on need and limited to a maximum one-time assistance of \$20 ¹ . Vehicular Expenses are not allowed under Short-term Assistance	Work Support Work Search Support Education Support	Personal Transportation Expenses are based on need and limited to a maximum of \$20 a week and a maximum of \$600 in a 12-month period. Note: Office managers may make exceptions for customers who: a) need assistance beyond these limits to comply with cooperation requirements for TANF Choices or SNAP E&T ³ , b) receive education support from Workforce Solutions, and c) participate in a special initiative authorized or supported by H-GAC ⁴ . Vehicular Expenses ² are limited to: – Car repair/maintenance, consumables: \$500 in a 12-month period – Car Insurance (liability), Vehicle Registrations: \$200 in a 12-month period
Health Care or Health-Related – Immunizations – Physical Exams – Vision/corrective lenses – Prescription safety glasses – Drug tests	Does Not Apply		Work Support Work Search Support Education Support	Expenses are limited to a maximum of \$250 in a 12-month period.

¹ Limited to customers who need this assistance to keep a job or accept a job offer.

² Limited to customers who need this assistance to complete Workforce Solutions supported education services or to comply with cooperation requirements for TANF Choices or SNAP E&T.

³ SNAP E&T customers cannot receive assistance with transportation expenses for car insurance, vehicle registration, and safety inspections.

⁴ H-GAC may authorize limited assistance for customers who participate in initiatives included in the Special Initiatives chart below.

Financial Aid Limits by Type of Assistance

Category of Assistance Requested	WFS Short-term Assistance		WFS Substantial Assistance	
	Type	Limits	Type	Limits
Clothing – Work clothes, uniforms for work or training – Interview clothes – Shoes, boots, safety boots	Available in Types marked below.	Short-term Assistance is one-time assistance limited to \$200	Available in Types marked below.	All limits apply to a 12-month period beginning October and ending September the following year.
		Expenses for clothing are limited to a maximum of \$50. ¹		Expenses for clothing are limited to a maximum of \$200 in a 12-month period.
		Expenses for tools and equipment are limited to a maximum of \$50. ¹		Expenses for tools and equipment are limited to a maximum of \$200 in a 12-month period.
		Expenses for licenses are limited to a maximum of \$50. ¹		Expenses for licenses are limited to a maximum of \$250 in a 12-month period.
Tools and Equipment Licenses – Application or renewal fees – Testing – Certification – Immigration document renewal fees – Background checks – TWIC ¹	Available in Types marked below.	Expenses for clothing are limited to a maximum of \$50. ¹	Work Support Work Search Support Education Support	Expenses for clothing are limited to a maximum of \$200 in a 12-month period.
		Expenses for documents are limited to a maximum of \$50. ¹		Expenses for documents are limited to a maximum of \$200 in a 12-month period.
Documents Fees to obtain documents for job search, education or work requirements – Birth Certificates – School records – Passports	Available in Types marked below.	Expenses for licenses are limited to a maximum of \$150. ¹	Work Support Work Search Support Education Support	Expenses for licenses are limited to a maximum of \$250 in a 12-month period.
		Expenses for documents are limited to a maximum of \$50. ¹		Expenses for documents are limited to a maximum of \$200 in a 12-month period.

¹ Limited to customers who need this assistance to keep a job or accept a job offer.

Financial Aid Limits by Type of Assistance Special Initiatives

Initiative	Description	Financial Aid Available	Contact
Individuals experiencing homelessness who are working with a community organization	Initiative aimed at helping customers experiencing homelessness find employment. Customer must be working with a community organization helping the customer with life challenges while Workforce Solutions is helping the individual find employment.	See Service to Individuals Experiencing Homelessness Desk Aid	Kevin Rodney
Cuney Homes	Partnership with the Houston Housing Authority to help Cuney Homes residents find employment	Staff on-site at Cuney Homes	Kevin Rodney
Women in Construction	This initiative will provide an employer driven opportunity to expand more women, post Harvey, in nontraditional construction craft trades in high-skill high-growth construction occupations by providing the resources for housing, childcare, transportation, clothing and tools for women apprentices. United Way Thrive partner agencies will provide counseling support, financial coaching and wrap around service not funded by the Board.	Customers may receive financial aid in the categories listed above. They may also receive assistance for housing expenses. Expenses for housing assistance includes deposits, rent for one-month, current utilities, electricity, water, gas and phone. Housing expenses are limited to a maximum of \$2000.00 with manager approval.	Traci Nolen
Harvey NDW	Allowable activities under this grant are those that will affect a fully integrated, demand-driven response to the transition needs of individuals impacted by Hurricane Harvey that shall include temporary disaster relief employment, and all other employment and training activities normally available through Workforce Solutions Offices also known as American Job Centers to dislocated workers, including career counseling, job search assistance, other career and supportive services, and training.	Customers may receive all financial aid as listed for WIOA customers. We will further provide reimbursement for parking and transportation costs to customers working to customers determined eligible for Harvey NDW and assigned to Harvey NDW worksite. In the event that a temporary worker's job duties require them to use their personal vehicle for work related travel, Workforce Solutions will reimburse the temporary employee based on the employer's (worksite) mileage reimbursement policies. Employers (worksites) will need to provide documentation of their travel policy for full time employees to justify the need for travel for temporary workers.	Traci Nolen

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Behind Grade Level	One or more grade levels below the grade level appropriate to age											
	6	7	8	9	10	11	12	13	14	15	16	17
Age as of Sept 1												
Grade	1	2	3	4	5	6	7	8	9	10	11	12
Deficient in Basic Literacy Skills	Computes or solves problems, reads, writes, or speaks English at or below 8.9 or is unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual's family or in society											
Disability	A. a physical or mental impairment that substantially limits one or more of the major life activities of such individual B. a record of such an impairment C. being regarded as having such an impairment											
Documentation	Physical evidence obtained to verify or validate customer information; becomes a part of the customer's record											
Dropout	An individual who is no longer attending any school and who has not received a secondary school diploma or its recognized equivalent											
Eligible Veteran	A person who served in the active military, naval, or air service and was discharged or released under conditions other than dishonorable. Active services include full-time duty in the National Guard or a Reserve component, other than for training purposes.											
Foster Care Youth	Youth in foster care or aged out of foster care system. Applies as a youth target group but the "aged out" criteria does not apply to determining low-income status											

GLOSSARY OF TERMS WORKFORCE SOLUTIONS FINANCIAL AID

Foster Child	A child on behalf of whom state or local government payments are made and for whom a court order removing the child from the custody of the parent and specifying a managing conservator exists. Applies to determining low-income status (Adult and In-School Youth). Not necessary for Out-of-School Youth since Foster Care Youth is a target group that does not require low-income status.
Habitually Truant Youth	The unexcused absence of a child from school without the consent of parents on 10 or more days or parts of days within a six-month period or three or more days or parts of days within a four-week period
Homeless	<p>An individual who lacks a fixed, regular, and adequate nighttime residence; and who has a primary nighttime residence that is:</p> <ul style="list-style-type: none"> ● Supervised publicly or privately operated shelter designed to provide temporary living accommodations ● An institution that provides a temporary residence for individuals intended to be institutionalized <p>Or</p> <ul style="list-style-type: none"> ● a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings <p>Includes individuals:</p> <ul style="list-style-type: none"> ● Sharing housing due to loss of housing, economic hardship or a similar reason ● Living in motels, hotels, trailer parks, or camp grounds due to lack of alternative accommodations ● Living in emergency or transitional shelters ● Abandoned in hospitals ● Whose primary nighttime residence is not ordinarily used as a regular sleeping accommodation (e.g. park benches, etc) ● Living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations ● Who are migratory living in any of the above situations. <p>Note: This does not include an individual imprisoned or detained under an Act of Congress or State law. An individual who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as homeless.</p>

GLOSSARY OF TERMS WORKFORCE SOLUTIONS FINANCIAL AID

Independent Child	An individual that may be living with their parent or guardian but is not dependent on them for food, shelter, or other forms of required support
Individual	A person not meeting the definition of family (aka family of one).
In-School Youth	An individual in school; compulsorily, alternative, or post-secondary.
Literacy	Ability to read, write, and speak in English, and to compute, and solve problems, at levels of proficiency necessary to function on the job, in the family of the individual, and in society
Qualified Spouse (of a veteran)	<p>The spouse of:</p> <ol style="list-style-type: none"> 1. Any veteran who died of a service-connected disability or any member of the armed forces who died while serving on active military, naval, or air service. 2. Any member of the Armed Forces serving on active duty who, at the time of application for the priority, has been listed for a total of more than 90 days in one or more of the following categories: <ol style="list-style-type: none"> i. Missing in action; ii. Captured in line of duty by a hostile force; or iii. Forcibly detained or interned in line of duty by a foreign government or power; 3. Any veteran who has a total disability resulting from a service-connected disability as evaluated by the U.S. Department of Veterans Affairs; 4. Any veteran who died while a disability, as indicated in paragraph (3) of this section, was in existence. <p>Note: the spouse of a living veteran or service member (definitions 2 or 3 above) will lose his or her eligibility if the veteran or service member loses the status that is the basis for eligibility. For example, the spouse of a veteran with a total service-connected disability will not be eligible if the veteran's disability is revised to a lower level. Similarly, a spouse whose eligibility is derived from a living veteran or service member will lose his or her eligibility upon divorce from the veteran or service member.</p>

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Self-Certification	An individual's signed attestation that the information he/she submits to demonstrate eligibility is true and accurate
Self-Sufficiency	The income level at which a family can provide basic needs for all of its members. Workforce Solutions defines self-sufficiency at 200% of the Federal Poverty Guidelines. Refer to the Workforce Solutions Income Guidelines for income levels.
Unemployed	<p>An individual who is without a job, and wants and is available for work</p> <ul style="list-style-type: none"> ● An individual who did not work during the seven consecutive days prior to application, who made specific efforts to find a job within the past four weeks, and who was available for work during the seven consecutive days prior to application ● An individual who did not work ● An individual who was waiting to be called back to a job from which he/she had been laid off ● An individual who was waiting to report to a new wage or salary job scheduled to start within 30 days
Underemployed	Underemployment occurs when an individual is either overqualified for his or her job or is not working full time and is working fewer hours than desired. For example, a college graduate in microbiology can find no work in his or her field and ends up as a clerk in a department store

GLOSSARY OF TERMS WORKFORCE SOLUTIONS FINANCIAL AID

Income Sources and Definitions		WIOA	Child Care
"X" Indicates Included Income			
Gross Wages/Salary	Wages paid before deductions are made *Note: For Child Care, exclude income earned by dependents 14-19 attending school	X	X*
Self-Employment Income	Revenues, minus expenses, operating costs, and taxes earned by a gainfully occupied individual who works for himself/herself as opposed to a salaried or commissioned worker who is the employee of another	X	X
Regular Social Security Payments (Old Age Benefits)	Benefits to survivors, retired worker (old-age) beneficiaries and the spouse and children of deceased insured workers	X	
Workers Compensation	Compensation for death, injury, or accident suffered by a worker in the course of his/her employment and paid to him/her or his/her dependents	X	X
Other Disability Payments	A veteran's service connected disability or death payments, and other disability payments not listed here		
Interest/Dividends	Income (interest, dividends, annuities, or royalties) that is not derived in the ordinary course of a trade or business	X	X
Railroad Retirement	A public fund that provides monthly benefits to retired and disabled railroad workers; their dependents; and to the survivors of deceased workers	X	X
Other Pensions/Retirement Income Including 401(K) Early Withdrawals	A pension or other income on which a retired person lives. Withdrawal from a 401 (K) or other tax deferred retirement account before retirement	X	X
Other Included Income	Any income not specifically excluded below is included in the income calculation	X	X

GLOSSARY OF TERMS WORKFORCE SOLUTIONS FINANCIAL AID

Income Sources and Definitions "X" Indicates Included Income		WIOA	Child Care
Child Support	Money paid for the care of one's minor, especially payments to a divorced spouse or a guardian under a decree of divorce	X	
Public Assistance	Cash welfare payments, including <i>TANF - Temporary Assistance for Needy Families</i> ; <i>SSI - Supplemental Security Income</i> ; <i>RCA - Refugee Cash Assistance</i> ; <i>GA - General Assistance</i> ; <i>Emergency Assistance</i> ; and <i>General Relief</i>		
Unemployment Insurance Benefits	An allowance of money paid, usually weekly, to an unemployed worker by a state or federal agency or by the worker's labor union or former employer during all or part of the period of unemployment	X	
Capital Gains/Losses	A capital gain is a profit that results from investments into a capital asset, such as <i>stocks</i> , <i>bonds</i> or <i>real/estate</i> , which exceeds the purchase price. It is the difference between a higher selling price and a lower purchase price, resulting in a financial gain for the investor. Conversely, a capital loss arises if the proceeds from the sale of a capital asset are less than the purchase price. Capital gains may refer to "investment income" that arises in relation to real assets such as property, and financial assets such as shares/stocks or bonds.	X	X
One Time Cash Payment	One-time cash payments that include tax refunds; loans, which are debt and not income; one-time insurance payments; gifts and lump sum inheritances.		
Veterans Active Duty	Income earned while a veteran was on active military duty and certain other veteran benefits, i.e. compensation for service-connected disability, compensation for service-connected death, vocational rehabilitation, and education assistance		
Payment in Lieu of TANF	Cash assistance available to eligible applicants through HHSC		
Payment from Home Sale	Lump sum payments received as assets in the sale of a home, where the assets are to be reinvested in the purchase of a new home consistent with Internal Revenue Service (IRS) guidance		
Auto Accident Payment	Payments received as the result of an automobile accident insurance settlement, that are being applied to the repair or replacement of an automobile		

GLOSSARY OF TERMS WORKFORCE SOLUTIONS FINANCIAL AID

Income Sources and Definitions "X" Indicates Included Income		WIOA	Child Care
Social Security Disability Income (SSDI)	Income received through a federal program that provides assistance to people who cannot work due to a disability.	X	X
Winnings	Lottery or gambling winnings.		X
Supplemental Nutrition Assistance Program (SNAP)	Non-cash assistance available to eligible applicants through HHSC		
Housing Voucher	Housing assistance through HUD		
Scholarship Assistance	Needs-based scholarship assistance		
Title IV Assistance	Financial assistance under Title IV of the Higher Education Act, i.e., Pell Grants, Federal Supplemental Educational Opportunity Grants, and Federal Work Study, PLUS, Stafford, and Perkins loans, and other payments that are considered debt and not income		
Foster Care Payments	Funds received to care for a foster child		
IDA Withdrawal	Any withdrawal from an Individual Development Account (IDA) for the purchase of a home, medical expenses, or educational expenses.		

GLOSSARY OF TERMS WORKFORCE SOLUTIONS FINANCIAL AID

Income Sources and Definitions		WIOA	Child Care
Other Excluded Income	<p>"X" Indicates Included Income</p> <p>Non cash benefits such as employer-paid fringe benefits, food or housing received in lieu of wages, Medicare, Medicaid, SNAP benefits, school meals, and housing assistance.</p> <p>Note: When a federal statute states that income or payments received under that statute should be excluded for determining eligibility for benefits under any other federal statute, the income or payments received are excluded. For example, payments received as adoption subsidies are excluded income.</p>		

GLOSSARY OF TERMS WORKFORCE SOLUTIONS FINANCIAL AID

Family Definitions	
WIOA	<p>Two or more people related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:</p> <p>Two married individuals and dependent children</p> <p>A parent or guardian and dependent children</p> <p>Two married individuals</p> <p>Two or more people related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:</p> <p>Two married individuals - including by common-law, and household dependents</p> <p>A parent and household dependents</p> <p>Household dependent: An individual living in the household who is:</p> <p>An adult considered a dependent of the parent for income tax purposes;</p> <p>A child of a teen parent; or</p> <p>A child or other minor living in the household who is the responsibility of the parent.</p>
Child Care	<p>Parent--An individual who is responsible for the care and supervision of a child and is identified as the child's natural parent, adoptive parent, stepparent, legal guardian, or person standing in loco parentis (as determined in accordance with Commission policies and procedures). Unless otherwise indicated, the term applies to a single parent or both parents.</p>

GULF COAST WORKFORCE REGION
High-Skill, High-Growth Jobs Targeted by the Gulf Coast Workforce Board^{1,2}

SOC	Occupational Title	Annual Averages 2016	Annual Averages 2026	Employment Growth Absolute Change	Percent Change	Exits	Annual Average Job Openings Transfers	Annual Average Job Openings Growth	Total	Typical Education Needed	Work Experience in Related Occ	Typical On-the-job Training	Median Hourly Wage 2017
Professional, Business, & Technical Services													
13-2011	Accountants & Auditors	40,808	48,606	7,798	19.1	1,320	2,572	780	4,672	Bachelor's	None	None	\$37.36
17-20XX	Engineers, Aerospace, Electrical, Environmental, Mechanical ^{4,5}	18,820	22,555	3,735	19.8	447	830	373	1,650	Bachelor's	None	None	\$51.78
15-1121	Computer Systems Analysts ²	15,630	17,580	1,950	12.5	304	741	195	1,240	Bachelor's	None	None	\$44.48
15-1141	Database Administrators	3,278	3,851	573	17.5	75	148	57	280	Bachelor's	None	None	\$42.49
17-3023	Electrical & Electronic Engineering Technicians ³	4,825	5,549	724	15.0	166	273	72	511	Associate's	None	None	\$30.27
41-3021	Insurance Sales Agents ³	8,964	10,233	1,269	14.2	390	516	127	1,033	High school	Moderate-term	None	\$18.51
17-3091	Interpreters & Translators	2,064	2,545	481	23.3	104	100	48	252	Bachelor's	None	None	\$24.78
23-1011	Lawyers ³	15,874	18,281	2,407	15.2	339	369	241	949	Doctoral or prof.	None	None	\$75.57
17-3027	Mechanical Engineering Technicians	2,102	2,548	446	21.2	74	122	45	241	Associate's	None	None	\$35.31
15-1142	Network & Computer Systems Administrators ⁴	8,313	9,300	987	11.9	124	414	99	637	Bachelor's	None	None	\$45.80
15-2031	Operations Research Analysts	2,166	2,838	672	31.0	51	94	67	212	Bachelor's	None	None	\$40.21
23-2011	Paralegals & Legal Assistants ²	5,965	7,172	1,207	20.2	217	437	121	775	Associate's	None	None	\$27.58
15-1132	Software Developers, Applications	12,585	16,426	3,841	30.5	198	712	384	1,294	Bachelor's	None	None	\$52.59
15-1133	Software Developers, Systems Software ²	7,212	8,079	867	12.0	104	375	87	566	Bachelor's	None	None	\$53.27
Construction													
17-3011	Architectural & Civil Drafters	4,195	5,070	875	20.9	137	250	88	475	Associate's	None	None	\$25.31
17-3022	Civil Engineering Technicians	2,888	3,462	574	19.9	102	167	57	326	Associate's	None	None	\$25.48
17-2051	Civil Engineers	10,634	12,841	2,207	20.8	254	578	221	1,053	Bachelor's	None	None	\$50.37
47-4011	Construction & Building Inspectors	2,452	2,985	533	21.7	134	154	53	341	High school	5 years or more	Moderate-term	\$29.89
13-1051	Cost Estimators	5,194	6,192	998	19.2	179	370	100	649	Bachelor's	None	Moderate-term	\$34.46
47-2111	Electricians ²	19,432	22,445	3,013	15.5	729	1,556	301	2,586	High school	None	Apprenticeship	\$26.25
49-9021	Heating, Air Conditioning, & Refrigeration Mechanics & Installers	6,378	7,725	1,347	21.1	195	473	135	803	Postsecondary nondegree	None	Long-term	\$21.85
47-2132	Insulation Workers, Mechanical	1,580	1,863	283	17.9	46	132	28	206	High school	None	Apprenticeship	\$20.90
47-2073	Operating Engineers & Other Construction Equipment Operators	10,504	12,741	2,237	21.3	444	815	224	1,483	High school	None	Moderate-term	\$19.10
47-2152	Plumbers, Pipefitters, & Steamfitters	14,522	17,420	2,898	20.0	579	1,068	290	1,937	High school	None	Apprenticeship	\$25.70
47-2221	Structural Iron & Steel Workers	3,094	3,698	604	19.5	98	256	60	414	High school	None	Apprenticeship	\$20.63
51-4121	Welders, Cutters, Solderers, & Brazers	18,269	22,318	4,049	22.2	540	1,585	405	2,530	High school	None	Moderate-term	\$23.04
Education													
25-20XX	Kindergarten, Middle, Secondary Teachers, Ex. Special Ed. ²	81,238	99,123	17,885	22.0	2,962	3,425	1,788	8,175	Bachelor's	None	None	\$28.96
25-205X	Special Ed. Teachers, Preschool thru Secondary ^{4,5}	6,395	7,776	1,381	21.6	235	259	138	632	Bachelor's	None	None	\$29.86
25-2032	Career/Technical Education Teachers, Secondary School	1,657	2,006	349	21.1	56	68	35	159	Bachelor's	Less than 5 years	None	\$30.36
21-1012	Educational, Guidance, School, & Vocational Counselors	5,715	6,902	1,187	20.8	232	413	119	764	Master's	None	None	\$30.02
25-1071	Health Specialties Teachers, Postsecondary	3,089	3,803	714	23.1	126	131	71	328	Doctoral or prof.	Less than 5 years	None	\$70.59
25-9031	Instructional Coordinators	3,588	4,337	749	20.9	188	162	75	425	Master's	Less than 5 years or more	None	\$34.65
25-4021	Librarians	2,412	2,855	443	18.4	144	98	44	286	Master's	None	None	\$28.99
25-2011	Preschool Teachers, Except Special Education ³	10,651	12,455	1,804	16.9	498	617	180	1,295	Associate's	None	None	\$11.55
Healthcare													
29-10XX	Physicians incl. Dentists ^{4,5}	10,316	12,902	2,586	25.1	251	171	368	790	Doctoral or prof.	None	Internship/residency	\$80.94
17-2031	Biomedical Engineers ³	231	259	28	12.1	5	11	3	19	Bachelor's	None	None	\$40.29
29-2031	Cardiovascular Technologists & Technicians	1,585	1,893	308	19.4	45	43	31	119	Associate's	None	High-Skill	\$20.90
19-3031	Clinical, Counseling, & School Psychologists	1,779	2,141	362	20.3	49	75	36	160	Doctoral or prof.	None	High-Skill Internship/residency	\$31.19

GULF COAST WORKFORCE REGION
High-Skill, High-Growth Jobs Targeted by the Gulf Coast Workforce Board^{1,2}

SOC	Occupational Title	Employment Growth			Annual Average Job Openings			Typical Education Needed	Work Experience in Related Occ	Typical On-the-job Training	Median Hourly Wage 2017
		Annual Averages 2016	Annual Averages 2026	Absolute Change	Percent Change	Exits	Transfers				
29-2021	Dental Hygienists	2,629	3,148	519	19.7	104	65	52	221	None	\$34.51
29-2032	Diagnostic Medical Sonographers	1,691	2,274	583	34.5	51	49	58	158	None	\$35.60
21-1022	Healthcare Social Workers	2,708	3,466	758	28.0	111	196	76	383	None	\$30.26
29-2061	Licensed Practical & Licensed Vocational Nurses ²	13,460	16,720	3,260	24.2	532	524	326	1,382	Internship/residency	\$22.70
29-2012	Medical & Clinical Laboratory Technicians	2,544	3,071	527	20.7	85	85	53	223	None	\$25.27
29-2011	Medical & Clinical Laboratory Technologists	3,306	4,028	722	21.8	111	111	72	294	None	\$25.28
29-2071	Medical Records & Health Information Technicians	3,756	4,603	847	22.6	123	124	85	332	None	\$20.16
29-1151	Nurse Anesthetists	2,131	2,753	622	29.2	33	80	62	175	None	\$75.80
29-1171	Nurse Practitioners	2,148	3,048	900	41.9	50	74	90	214	None	\$57.93
29-9011	Occupational Health & Safety Specialists	4,764	5,601	837	17.6	115	142	84	341	None	\$36.05
29-1122	Occupational Therapists	1,935	2,450	515	26.6	45	61	52	158	None	\$42.83
29-1023	Physical Therapists ²	3,011	3,864	853	28.3	66	72	85	223	None	\$44.36
29-1071	Physician Assistants	1,817	2,527	710	39.1	38	77	71	186	None	\$51.12
29-2034	Radiologic Technologists	3,922	4,924	1,002	25.5	114	110	100	324	None	\$29.76
29-1141	Registered Nurses	52,641	65,839	13,198	25.1	1,696	1,288	1,320	4,304	None	\$37.49
29-1126	Respiratory Therapists	2,628	3,161	533	20.3	68	66	53	187	None	\$29.30
29-1127	Speech-Language Pathologists	2,756	3,499	743	27.0	57	97	74	228	None	\$38.92
29-2055	Surgical Technologists	3,129	3,820	691	22.1	113	154	69	336	None	\$24.35
Oil & Gas and Related Manufacturing											
17-2XXX	Engineers, Chem., Industrial, Materials, Marine, Mining, Petroleum ^{4,5}	21,650	25,813	4,163	19.2	551	1,240	499	2,290	None	\$65.29
51-8091	Chemical Plant & System Operators ⁴	2,920	2,760	-160	-5.5	66	213	-16	263	Moderate-term	\$33.90
51-4011	Computer-Controlled Machine Tool Operators, Metal & Plastic	3,915	4,868	953	24.3	121	308	95	524	Moderate-term	\$21.62
19-4041	Geological & Petroleum Technicians ²	2,618	3,043	425	16.2	78	204	42	324	Moderate-term	\$33.10
19-2042	Geoscientists, Except Hydrologists & Geographers	6,286	7,525	1,239	19.7	149	474	124	747	None	\$64.47
17-2111	Health & Safety Engineers, Except Mining Safety Engineers & Inspectors ³	1,419	1,627	208	14.7	35	62	21	118	None	\$47.50
49-9041	Industrial Machinery Mechanics	10,901	13,138	2,237	20.5	406	621	224	1,251	Long-term	\$27.94
51-4041	Machinists	9,758	12,260	2,502	25.6	382	717	250	1,349	Long-term	\$21.97
49-9043	Maintenance Workers, Machinery	2,811	3,352	541	19.2	132	178	54	364	Long-term	\$20.41
17-3013	Mechanical Drafters	2,062	2,485	423	20.5	67	123	42	232	None	\$32.44
51-8093	Petroleum Pump System Operators, Refinery Operators, & Gaugers ²	4,409	4,578	169	3.8	104	337	17	458	Moderate-term	\$33.44
47-5013	Service Unit Operators, Oil, Gas, & Mining ³	5,520	6,376	856	15.5	147	552	86	785	Moderate-term	\$22.94
47-2211	Sheet Metal Workers	3,204	3,945	741	23.1	124	245	74	443	Apprenticeship	\$20.30
17-3031	Surveying & Mapping Technicians	3,000	3,727	727	24.2	111	239	73	423	None	\$22.03
17-1022	Surveyors	1,520	1,887	367	24.1	50	69	37	156	Internship/residency	\$29.07

GULF COAST WORKFORCE REGION
High-Skill, High-Growth Jobs Targeted by the Gulf Coast Workforce Board^{1,2}

SOC	Occupational Title	Employment Growth			Exits	Annual Average Job Openings			Typical Education Needed	Work Experience in Related Occ	Typical On-the-job Training	Median Hourly Wage 2017
		Annual Averages 2016	2026	Absolute Change		Percent Change	Transfers	Growth				
	Transportation											
49-3031	Bus & Truck Mechanics & Diesel Engine Specialists ²	7,782	9,448	1,666	21.4	264	492	167	923	None	Long-term	\$23.04
53-7021	Crane & Tower Operators	2,678	3,176	498	18.6	96	205	50	351	Less than 5 years	Moderate-term	\$26.03
53-2031	Flight Attendants	6,367	7,831	1,464	23.0	351	402	146	899	Less than 5 years	Moderate-term	\$27.13
53-3032	Heavy & Tractor-Trailer Truck Drivers ²	41,611	48,742	7,131	17.1	1,916	2,838	713	5,467	None	Short-term	\$19.49
13-1081	Logisticians	4,312	5,066	754	17.5	115	330	75	520	None	None	\$39.60
49-3042	Mobile Heavy Equipment Mechanics, Except Engines	3,448	4,180	732	21.2	119	240	73	432	None	Long-term	\$23.05
43-5061	Production, Planning, & Expediting Clerks	8,626	10,164	1,538	17.8	326	610	154	1,090	None	Moderate-term	\$23.17

**GULF COAST WORKFORCE REGION
High-Skill, High-Growth Jobs Targeted by the Gulf Coast Workforce Board^{1,2}**

SOC	Occupational Title	Employment Growth		Annual Average Job Openings			Typical Education Needed	Work Experience in Related Occ	Typical On-the-job Training	Median Hourly Wage 2017
		Annual Averages 2016	Absolute Change 2026	Percent Change	Exits	Transfers				

¹ High-skill jobs targeted by the Gulf Coast Workforce Board are those that offer the best employment opportunities for Gulf Coast residents now and in the immediate future.

² Criteria used to identify these occupations are:
Occupation must be found in one or more GCWRB Targeted Industries

- 50% or more of total occupational employment must be found in Targeted Industries as of 2026
- Projected employment in 2026 greater than or equal to the median for all occupations in the region (≥ 1,819)
- Projected growth rate greater than or equal to the average of all occupations in the region (≥ 17.4%)
- Minimum education requirements of a postsecondary degree or certificate, moderate on-the-job training, long-term on-the-job training, or work experience in a related occupation
- Median hourly wage equal to or greater than the 2017 median for all occupations in the region (≥ \$18.70)

2. Occupations found on the previous High-Skill High-Growth Occupation List and which meet four of the five qualifying criteria above have been retained.
3. Other occupations meeting some but not all of the above criteria have also been included based on the best regional labor market intelligence available. Employers can petition to have other occupations added or deleted as labor market conditions change.
4. Occupations included on the previous High-Skill High-Growth List that are projected decline over 2016 to 2026, but were retained due to their continued importance to the industry in which they are predominantly found and/or regional economy.
5. Hourly wages were obtained by dividing the reported median annual wage by 2,080 hours. Note that actual per hour earnings are likely to differ as education-related occupations are typically compensated on a 9 or 10 month basis.

Authorized for use by the Gulf Coast Workforce Board: February 2019.

Transportation Expenses

Desk Aid

We provide short-term and substantial assistance to customers for transportation expenses to help them get a job, keep a job, or get a better job. Workforce Solutions supports transportation expenses that are reasonable and necessary. Transportation assistance is available in the following categories:

- **Personal transportation expenses**
 - Gas
 - Bus fare/passes
 - Other personal transportation expense i.e. taxi fare

- **Vehicular transportation expenses**
 - Car Repair and Maintenance
 - Consumables (i.e. tires, batteries)
 - Vehicle Safety Inspection
 - Liability Car Insurance
 - Vehicle Registration

Short-Term Assistance

We may provide short-term assistance to a customer requesting personal transportation expenses if the customer has a job or job offer and needs the assistance to work.

Substantial Assistance

We may provide substantial assistance to a customer requesting personal transportation expenses or vehicular expenses if the customer (a) has a job or job offer and needs the assistance to work or (b) is required to work with us to maintain a benefit such as TANF or SNAP; or (c) is participating in a Workforce Solutions supported training program.

Personal Transportation Expenses

We use bus passes and gas cards as the primary way to assist with personal transportation expenses. Use of cash cards for personal transportation expenses are the exception and only apply to customers in education/training supported by Workforce Solutions.

- We may provide personal transportation assistance to customers who need help:
 - to continue working;
 - to accept a job or with getting a promotion;
 - completing education or training to go to work; or
 - if the customer is required to cooperate with Workforce Solutions to retain TANF or SNAP benefits **and** is engaged in work search.

Transportation Assistance Desk Aid
April 19, 2017

Additional Transportation Guidelines

- When providing transportation assistance, including parking when appropriate, to support education/training services, Career Office staff may authorize the assistance in advance for anticipated travel. This type of ongoing support may not exceed one month. Career Office staff can authorize an additional period of assistance if the customer provides attendance verification to support the assistance provided in the prior period.
- When a customer requests a need for transportation assistance beyond the established limits, use MapQuest or similar sites to determine mileage. Multiply a mileage rate of 15 cents per mile by the total number of miles traveled from the customer's home to school for the days she is scheduled to attend each week. Approval by the manager is required.
- The office manager may approve payment for other means of personal transportation, such as taxi fare, when there is no other practical way help the customer meet her transportation need.

Vehicular Expenses

Minor Car Repairs, Maintenance, Consumables and Safety Inspections

Workforce Solutions may pay for minor mechanical repairs, maintenance, consumables and safety inspections if the customer:

- Demonstrates clearly and conclusively that she is unable to work, search effectively for work, or attend school without the repairs; and-
- Demonstrates that she owns the vehicle or has the approval of the vehicle owner for the proposed service (see Vehicle Permission/Hold Harmless); and
- Co-signs a statement with the vehicle's owner that she uses the vehicle to get to employment, work search, or school as called for in her employment plan

Workforce Solutions procured Firestone to provide service to our customer's vehicles needing this type of assistance. When we approve paying for that service:

- ✓ Career office staff gives the customer a special Firestone Voucher from FAMS.
- ✓ Firestone provides the payment office an estimate before beginning work.
- ✓ Only when we do not find a Firestone location available within 50 miles from the customer's residence, the customer must give us two estimates from area automotive repair/supply businesses listed in the local telephone directory and open to the public.

Car Insurance and registration

Workforce Solutions may pay for liability car insurance and vehicle registrations if the customer:

- Demonstrates clearly and conclusively that she is unable to get to work, search effectively for work, or attend school without one of the above, and
- Has an estimate, or a bill, from the vendor for the cost, and

Transportation Assistance Desk Aid
April 19, 2017

- Demonstrates that she owns the vehicle or
 - has the approval of the vehicle owner for the proposed service (see Vehicle Permission/Hold Harmless form attached); and
 - Co-signs a statement with the vehicle's owner that she uses the vehicle to get to employment, work search, or school as called for in her employment plan

We will pay the vendor directly for insurance and registration.

Please refer to the [Financial Aid Limits](#) desk-aid for limits to transportation assistance.

Office Managers may approve exceptions to the personal and vehicular expense limitations when there are extraordinary circumstances and/or a clear need for a greater level of assistance is documented in the customer's employment plan and TWIST counselor notes.

SNAP E&T customers cannot receive assistance with vehicular transportation expenses for car insurance, vehicle registration, and safety inspections.

Transportation Assistance Desk Aid
April 19, 2017

HIGH POVERTY CENSUS TRACTS

County	Census Tract ID	County	Census Tract	County	Census Tract ID
Brazoria	6643		2205		2313
Fort Bend	6737		2207		2321
	6749		2207		2323.01
Galveston	7237		2210		2327.01
	7240		2213		2327.02
	7241.01		2214		2331.02
	7242		2215		2331.03
	7243		2216		2335
Harris	7246		2217		2336
	7247		2218		2401
	7252		2219		2404
	2104		2220		2405.01
	2105		2224.01		2405.02
	2107		2225.01		2406
	2108		2225.03	Harris	2408.01
	2109		22226		2525
	2110		2227		2526
	2111		2230.01		2544
Harris	2112		2230.02		3101
	2113		2231		3104
	2114		2301		3105
	2116		2302		3107
	2117		2303		3108
	2119		2304		3109
	2123		2306		3110
	2124		2307		3112

HIGH POVERTY CENSUS TRACTS

County	Census Tract ID	County	Census Tract ID	County	Census Tract ID
Harris	3117	Harris	3133	Harris	3321
	3118		3135		3326
	3122		3136		3327
	3123		3138		3331
	3124		3140.02		3332.02
	3128		3202		3333
	3129		3206.01		3335
	3133		3208		4201
	3135		3212		4205
	3136		3214.01		4211.01
	3138		3215		4211.02
	3140.02		3220		4212.01
	3202		3221		4212.02
	3206.01		3230		4213
	3208		3231		4214.01
	3212		3234		4214.02
	3214.01		3235		4215
3215	3239	4216			
3220	3241	4222			
3221	242	4223.01			
3230	3301	4225			
3231	3302	4229			
3234	3305	4230			
3117	3312	4231			
3118	3313	4232.02			
3122	3314	4320.02			
3123	3316.02	4325			
3124	3317	4327.01			
3128	3318	4328.02			

HIGH POVERTY CENSUS TRACTS

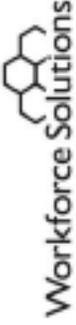
County	Census Tract ID	County	Census Tract ID
Harris County	4330.02	Harris	5320.01
	4330.03		5321
	4331		5322
	4335.01		5330
	4335.02		5333
	4336		5337.01
	4510.01		5338.02
	4525		5339.02
	4528.02		5340.01
	4531		5342.01
	4532		5501
	4533		5502
	4534.03		5503.02
	4536.02		5504.01
	5204		9800
	5205		7002
	5206.01		6931.01
	5206.02		6934
	5210		6939
	5211		7905
5212	7906		
5214	7907		
5222.02	7908		
5224.02	7402		
5301	7407		
5303			
5304			
5305			
5306			
5307			
Liberty County	5206.01	Liberty County	7002
	5206.02	Montgomery	6931.01
	5210		6934
	5211		6939
Walker	5212	Walker	7905
	5214		7906
	5222.02		7907
	5224.02		7908
Wharton	5224.02	Wharton	7402
	5301		7407
	5303		
	5304		
5305			
5306			
5307			



REASONS WE DENY OR DISCONTINUE FINANCIAL AID

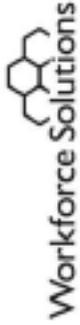
Enter one or more of the reasons below in the letter titled “Denying Financial Aid” when you are telling the customer we have denied or discontinued her/his financial aid

Reasons to Deny Financial Aid – New financial aid application	Appeals Form*	Reasons to Discontinue Financial Aid – Recertification or while the customer is receiving financial aid	Appeals Form*
<p>You did not return requested eligibility documents or information pertaining to your selected training program to us by the deadline [enter date]</p>	A1	<p>You did not contact Workforce Solutions and provide documents to recertify your eligibility by the required deadline [enter date]. You have fifteen (15) days from the date on this letter to make other child care arrangements and to appeal this decision (A2)</p>	A2
<p>Your family income exceeds the level allowed to receive this financial aid</p>	A1	<p>Your family income exceeds the level allowed to continue to receive child care financial aid. You have fifteen (15) days from the date on this letter to make other child care arrangements and to appeal this decision</p>	A2
<p>The documents you gave us show that you do not meet the following eligibility requirement: [enter one of the following]</p> <ul style="list-style-type: none"> - You are not working or in school, or working and in school, for at least 25 hours a week or 50 hrs a week for a two-parent family. - Your child must be younger than 13 years of age. - We do not provide child care financial aid to help you attend school when you have more than sixty-five (65) credit hours or two (2) years of post high school 	A1	<p>You do not meet the eligibility requirement to work, attend school, or work and attend school, for at least 25 hours a week or 50 hrs a week for a two-parent family. You have fifteen (15) days from the date on this letter to make other child care arrangements and to appeal this decision</p>	A2



REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Reasons to Deny Financial Aid – New financial aid application	Appeals Form*	Reasons to Discontinue Financial Aid – Recertification or while the customer is receiving financial aid	Appeals Form*
<p>education</p> <ul style="list-style-type: none"> - You are not a youth between the ages of 14 and 21. - You must be a citizen or resident able to work legally in the United States. - You did not register for Selective Service - To qualify for this financial aid you must be out of work because you were part of a mass layoff or plant closing, or you were laid off and are unlikely to return to the same occupation or industry. We cannot determine that you meet these criteria. 			
<p>We do not reimburse you for loans you've already taken out to go to school or tuition that you paid before we awarded you assistance.</p> <p>If you are currently enrolled in school, you cannot use our scholarship assistance for your current courses.</p>	A1		4
		<p>We do not provide child care financial aid to help you attend school when you have more than sixty-five (65) credit hours or two (2) years of post high school education</p> <p>You have 15 days from the date on this letter to make</p>	A2



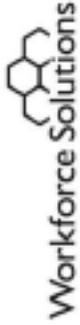
REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Reasons to Deny Financial Aid – New financial aid application	Appeals Form*	Reasons to Discontinue Financial Aid – Recertification or while the customer is receiving financial aid	Appeals Form*
		other child care arrangements.	
		You did not report, within 10 days, a change in family circumstances affecting your eligibility for financial aid. As a result, your child care financial aid has been discontinued.	6
		You have fifteen (15) days from the date on this letter to make other child care arrangements and to appeal this decision.	A1
		You are not eligible to reapply for child care financial aid or be placed on the waiting list for 30 days from the date of this letter.	A1
		Our records show that your income for (insert dates) is not what you reported to Workforce Solutions.	7
		You have 15 days from the date on this letter to make other child care arrangements.	A1
		You failed to pay your portion of the child care fee to your child's care provider. You have fifteen 15 days from the date on this letter to make other child care arrangements.	8
		You are not eligible to reapply for child care financial aid or be placed on the waiting list for 30 days from	A1



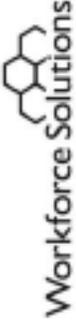
REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Reasons to Deny Financial Aid – New financial aid application	Appeals Form*	Reasons to Discontinue Financial Aid – Recertification or while the customer is receiving financial aid	Appeals Form*
		the date of this letter.	
		Your chosen child care provider will no longer care for your child. You must contact Workforce Solutions at the number below within 15 days if you want to arrange for financial aid from Workforce Solutions to another provider.	A1 9
		Your child (CHILD NAME) has exceeded the allowed 30-day limit for absences. We have notified your child care provider that we will no longer pay for (CHILD NAME) to receive care. You have fifteen 15 days from the date on this letter to make other child care arrangements. You are not eligible to reapply for child care financial aid or be placed on the waiting list for 30 days from the date of this letter.	A1 10



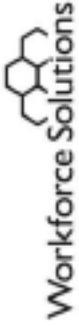
REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Reasons to Deny Financial Aid – New financial aid application	Appeals Form*	Reasons to Discontinue Financial Aid – Recertification or while the customer is receiving financial aid	Appeals Form*
		<p>You violated the parent agreement you signed before beginning to receive child care financial aid.</p> <p>You have fifteen 15 days from the date on this letter to make other child care arrangements.</p>	<p>11</p> <p>A1/2 depending on violation</p>
		<p>Your child was absent for five days in a row without contacting the child care provider or Workforce Solutions.</p> <p>Your child care financial aid is immediately terminated and you are not eligible to reapply for child care financial aid or be placed on the waiting list for 30 days from the date of this letter.</p> <p>Child care financial aid will not continue during an appeal.</p>	<p>12</p> <p>A1</p>
		<p>You or your alternate cardholder violated the attendance card security agreement more than once.</p> <p>You have 15 days from the date on this letter to make other child care arrangements.</p>	<p>13</p> <p>A2</p>



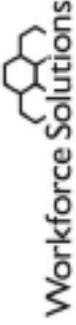
REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Reasons to Deny Financial Aid – New financial aid application	Appeals Form*	Reasons to Discontinue Financial Aid – Recertification or while the customer is receiving financial aid	Appeals Form*
		<p>Your child care provider [enter name] was placed on corrective/ adverse action. This required you to notify us of your decision to either keep your child[ren] enrolled at the provider or transfer to a new provider.</p> <p>You did not respond to us about your decision by the deadline [enter date]. We consider this a voluntary withdrawal from Workforce Solutions child care financial aid.</p> <p>Your child care financial aid is immediately terminated and will not continue during an appeal.</p>	<p>A1</p>
		<p>Your chosen child care provider has not returned required documents. If we receive all required documents from the chosen provider within 15 days from the date on this letter, we will begin to pay for your child's care. If you want to choose another child care provider, you must call the number below within 15 days and tell us who you want to care for your children.</p>	<p>A1</p>



REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Reasons to Deny Financial Aid – New financial aid application	Appeals Form*	Reasons to Discontinue Financial Aid – Recertification or while the customer is receiving financial aid	Appeals Form*	
		You did not make a C average in your most recent semester or term as required to maintain your scholarship	A1	16
		You cannot retain your scholarship because you are on academic probation	A1	17
		You did not respond to a letter from Workforce Solutions requiring you to contact us within 10 business days.	A1	18



REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Reasons to Deny Financial Aid – New financial aid application	Appeals Form*	Reasons to Discontinue Financial Aid – Recertification or while the customer is receiving financial aid	Appeals Form*
		<p>You did not comply with your scholarship agreement by keeping in touch with us as promised to [insert one reason from below]</p> <ul style="list-style-type: none"> - tell us you started training within 5 business days - tell us you dropped a course, made course changes, changed course of study (major), withdrew from school within 5 business days - show us your grades for all courses within 10 business days of semester end. - tell us the days you attended school or work to continue to receive your next payment for transportation expenses, you must report attendance at least every 2 weeks to continue receiving transportation financial aid. - inform us of your progress in school at least monthly. - report your school attendance. Your scholarship depends on compliance with your agreement to work with us to maintain HHSC benefits. 	<p align="center">A1</p> <p align="right">18</p>

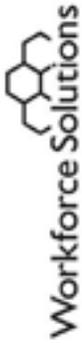


REASONS WE DENY OR DISCONTINUE FINANCIAL AID

- *A1 – We use this form when we do not give the customers the option of continuing to receive financial aid during the appeals process.
- *A2 – This appeals form adds a statement at the end telling the customer she may chose to continue to receive child care financial aid during her appeal. If she does not win the appeal, she is required to pay the money back.

We sometimes temporarily discontinue child care financial aid. We use the appropriate letter and appeals form to tell the customer we are “suspending” financial aid

Letter	Appeals Form *	When to use this letter	Requirements
Suspension – Medical leave	A1	<p>The parent is on medical leave from school or work for a period not to exceed 90 days during a one-year period.</p> <p>We may pay Child Care financial aid for up to 60 days of medical leave and suspend care while holding the customers slot for up to 30 additional days</p>	<ol style="list-style-type: none"> 1. The parent tells us she/he will not be working/in school due to temporary incapacitation not to exceed 90 days and 2. The parent has given us one of the 3 documents below to show she/he will be returning to work or school and the doctor’s statement: <ul style="list-style-type: none"> - Any document from the school showing the customers intent to resume education/training or - Written notification from the customer of her intent to enroll in training after the suspension or - A written statement from an employer saying the person will be returning to work and - A doctor’s statement that the customer needs medical leave from work or school with an end date no more than 90 days from the initial suspension 3. You must ask a customer when she/he contacts



REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Letter	Appeals Form *	When to use this letter	Requirements
Suspension – Parent not working/in school 25 hours a week or 50 hrs a week for a two-parent family	A1	The parent will not be working or in school for 25 hours a week or 50 hrs a week for a two-parent family for a time not to exceed 90 days a year	<p>you to end the suspension if circumstances have changed that would affect her eligibility – pay, hours, support for or from family members etc.</p> <p>4. Summarize the conversation in a counselor note. You do not need a new financial aid application if the customer’s circumstances have not changed.</p> <ol style="list-style-type: none"> 1. The parent is not on medical leave, <u>and</u> 2. The parent provided document/s to show she/he will be returning to work or school. Acceptable documents include: <ul style="list-style-type: none"> - Any document from the school showing the customers intent to resume training, <u>or</u> - Written notification from the customer of her intent to enroll in training after the suspension, <u>or</u> - A written statement from an employer saying the person will be returning to work. 3. When the customer contacts you to end the suspension, determine if any circumstances have changed that affect her eligibility – pay, hours, support for or from family members, etc. You <u>do not</u> need a new financial aid application if circumstances have not changed. However, you must summarize the conversation in a counselor note.



REASONS WE DENY OR DISCONTINUE FINANCIAL AID

Letter	Appeals Form *	When to use this letter	Requirements
Suspension – Child does to need care	A1	<p>The parent continues to work/train for 25 hours a week or 50 hrs a week for a two-parent family but the child does not need care for a time not to exceed 90 days a year</p> <p>The parent maintains all eligibility [continues in work/school for 25 hours a week or 50 hrs a week for a two-parent family and meets financial eligibility]</p> <p>We tell a customer that she has 4 weeks of child care to look for work after losing a job.</p>	<p>1. The parent does not need to provide any documents. We suspend care for the period requested and start it on the day the parent says she/he needs it again.</p>
Suspension – After 4 weeks seeking work	A1		<p>1. We will pay for up to 4 weeks of child care beginning on the date the customer became unemployed. The letter tells the customer when the financial aid will end unless she/he contacts us to re-establish eligibility</p>

Workforce Solutions Call Center
Phone: 713-334-5980 Fax: 713-266-2495
csc@wrksolutions.com
TWIST: 8737207



March 30, 2016

[Company]
Customer address
City, TX Zip

Dear [Company]:

We received your application for financial aid. We are denying your application because:

- You didn't submit all of the documents needed to determine your eligibility for financial assistance .

Please review the attached checklist for documents needed to determine your eligibility. If we receive the missing documents by **February 10, 2016**, we can reconsider your application. If we are able to determine that you are eligible for financial aid, we will send you a letter identifying the next steps.

This denial becomes final on **February 11, 2016** if we are unable to determine your eligibility to receive financial assistance at this time. You can appeal the decision denying your application or reapply for financial assistance at a later date.

If you have questions please contact me at **713-334-5980** or **csc@wrksolutions.com**

Sincerely,

staff name
Financial Aid Customer Support Specialist
Phone: 713-334-5980 & Fax: 713-266-2495
csc@wrksolutions.com

Workforce Solutions is an equal opportunity employer/program.
Auxiliary aids and services are available upon request to individuals with disabilities.
Texas Relay Numbers: 1-800-735-2989 (TTY) 1-800-735-2988 (Voice) or 711

09/21/15

Workforce Solutions CSC
P.O. Box 924586 Houston, TX 77292
713-334-5980 phone * 713-266-2495 fax
www.wrksolutions.com
Account: 10881734



[Date]

[Customer Name]

[Address]

[City, State, Zip Code]

Dear [Title and Name]:

We are sorry to inform you that we will not provide [the financial aid you requested] *or insert* [any further financial aid] because of the following reason(s):

[Insert one or more reasons from the list titled "Reasons to deny list"]

If you have questions please contact me at [insert your phone number] or [insert your email address].

You may appeal this decision by sending us the appeals form included in this letter. We must receive your appeal no later than 15 days from the date on this letter.

Sincerely,

Financial Aid Specialist
Workforce Solutions CSC
713-334-5980
csc@wrksolutions.com

Workforce Solutions is an equal opportunity employer/program.
Auxiliary aids and services are available upon request to individuals with disabilities.

02/26/13

Visit www.wrksolutions.com
for the most current version.

Appendix B-75

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Version 3.2-gc (24), 2/24/20

Type/Labels	Category	Function (Where document goes)	List	Definition	Office Use
2450 Provider Authorization	Financial Aid Tracking	Auto-Filed	N/A	Call center/Tracking use only - save to system before printing for provider	N
Appeal - ChCare	Financial Aid	Eligibility	Eligibility	Appeal and all attachments	Y
Appeal - Scholarship	Financial Aid	Eligibility	Eligibility	Appeal and all attachments	Y
Attendance Form	Financial Aid	Auto-Filed	N/A	Attendance forms for customers receiving WFS scholarship. Note: Do not use for tracking or TAA. For tracking, use 'All other cooperation hours' and for TAA, use 'TAA Update'	Y
Award Letter	Financial Aid	Auto-Filed	N/A	Award Letter	Y
ChCare- Authentication Response	Financial Aid	Eligibility	Eligibility	Responses to Income Exception letter, Identity Mismatch letter, UI Early Warning letter, Work and Training letter, Relative Care Income letter	Y
ChCare - Board Transfer	Financial Aid	Fulfillment	Fulfillment - ChCare	Any documents provided for a customer who is requesting a Board to Board transfer.	Y
ChCare - Called from Waitlist	Financial Aid	Eligibility	Eligibility	Application and all attachments for a new customer who has been called in from the waitlist	Y
ChCare - Local Match	Financial Aid	Eligibility	Eligibility	New applications for customers attending schools participating in the local match initiative.	Y
ChCare - New FA App	Financial Aid	Eligibility	Eligibility	Application and all attachments for a customer not already in care	Y
ChCare - New FA App -Spec Cat	Financial Aid	Eligibility	Eligibility	Teen parents, Veterans, children with disabilities, other priority groups. DO NOT USE for Local Match.	Y
ChCare - Transitional	Financial Aid	Eligibility	Eligibility	Application and all attachments for working customer transitioning from TANF	Y
Correspondence	Financial Aid / Tracking	Auto-Filed	N/A	Letters sent to customers, TWIST generated letters, parent fee letter	Y
Cost Obligation-Training plan	Financial Aid	Fulfillment	Fulfillment - Scholarships	Cost obligation form/training plan used to enter or update commitments, prompts FAMS action for customers already determined eligible	Y
DFPS Referrals	Financial Aid	DFPS	DFPS	Call center use only - referrals to start DFPS care	N
EEO Discrimination Complaint	Financial Aid / Tracking	Auto-Filed	N/A	Should be scanned with FA app or as MD, but call center or tracking can break out as separate document (NCI may want to scan separately at the office level)	Y
Grades or Transcripts	Financial Aid	Auto-Filed	N/A	Grades or Transcripts DO NOT USE FOR CREDENTIALS. Does not prompt data entry.	Y
Missing document	Financial Aid	Eligibility	Eligibility	Document needed to determine eligibility for scholarships, work/training support or child care that was not sent with application. Do not scan missing eligibility documents as any other type.	Y
Proof of Age	Core Eligibility	Auto-Filed	N/A	Documents used to prove age only. Should be scanned with other applicable documents when possible. Call center/tracking can store as core doc. (NCI may want to scan separately at the office level)	Y
Proof of Auth to work in US	Core Eligibility	Auto-Filed	N/A	Documents used to prove authorization to work in US for customers (1-9 documents). Office will scan with application. Call center will store as core document	N
Proof of Citizenship	Core Eligibility	Auto-Filed	N/A	Documents used to prove citizenship for children in care. Office will scan with application. Call center will store as core document.	N
Proof of Death	Core Eligibility	Auto-Filed	N/A	Documents used to prove that a customer or family member is deceased. Office will scan with application. Call center will store as core document. Always store under the name of the customer who is/was receiving services.	N
Recert - FA App	Financial Aid	Eligibility	Eligibility	Application and all attachments for a customer who already has child care financial aid	Y
Returned Mail	Financial Aid / Tracking	Auto-Filed	N/A	Use for all returned mail	Y
Scholarship - Called from Registry	Financial Aid	Eligibility	Eligibility	Application and all attachments for a customer requesting scholarship assistance or substantial support services who has been called in from the registry	Y
Scholarship/Support - FA App	Financial Aid	Eligibility	Eligibility	Application and all attachments for a customer requesting scholarship assistance or substantial support services	Y
Service Voucher	Financial Aid	Auto-Filed	N/A	Service voucher, signed check, returned checks/vouchers	Y
Special projects FA App	Financial Aid	Eligibility	Eligibility	Application and all attachments for OJT, Oil and gas, other special projects. Includes FA apps for customers using TAA funding (do not include TAA packet)	Y
TAA Academic Records	Financial Aid	TAA	TAA	Degree plans, transcripts, grades, schedules, attendance forms	Y
TAA Benchmarking Updates	Financial Aid	TAA	TAA	Benchmark documentation recorded on REP's, benchmark warning letters	Y
TAA Correspondence	Financial Aid	TAA	TAA	Employee statement of eligibility, written verification, job leads, customer withdrawal, verification correspondence	Y
TAA Cost/Financial	Financial Aid	TAA	TAA	Cost obligation forms, fee statements, vouchers, award letters	Y
TAA Customer Record	Financial Aid	TAA	TAA	Complete customer record with all documents related to the file. Historical only.	Y
TAA Orientation Packet	Tracking	Tracking	Tracking	Page 1 of REP with sections 1 and 2 completed/Explanation of Services. DO NOT SEND FA App with packet. FA app should be scanned as 'Special projects FA app'	Y
TAA REP	Financial Aid	TAA	TAA	New, amended or corrected Re-Employment Training Plans	Y
TAA Waiver	Financial Aid	TAA	TAA	Waiver documents, requested and approved	Y
Training Check Request	Financial Aid	Fulfillment	Work/Trng Support	All check requests for a customer who has been determined eligible for a Workforce Solutions scholarship	Y
Updates	Financial Aid	Updates	Eligibility	Use when the customer is reporting any change or has responded to the registry letter (customer was already determined eligible). Used most often when customers receiving childcare report a change in family size, income, or when they must provide a school schedule for continued care each semester.	Y

Updates-Eligibility	Financial Aid	Updates	Eligibility	Call center use only - updates that require eligibility review	N
Web mapping printout	Financial Aid	Auto-Filed	N/A	Printout from any web mapping site/ supports amount of financial aid. Should be scanned with cash sub request, call center can break out as separate document.	N
Youth - FA App	Financial Aid	Eligibility	Eligibility	Youth application and all attachments including TABE test if out of school	Y
1816 SNAP Noncompliance Report	Tracking	Auto-Filed	N/A	1816 SNAP Noncompliance Report	Y
1817 SNAP Transmittal	Tracking	Auto-Filed	N/A	1817 SNAP Transmittal	Y
1822 Work Requirement	Tracking	Tracking	Tracking	1822 Work Requirement	Y
2583 TANF Transmittal	Tracking	Auto-Filed	N/A	2583 TANF Transmittal	Y
All other cooperation hours	Tracking	Tracking	Tracking	All cooperation hours other than employment or high school (job search, community service, training)	Y
Appeal - Tracking	Tracking	Tracking	Tracking	Documents used for appeal	Y
Certificate-Credential	Tracking	Tracking	Tracking	Any document used to prove attainment of credential - prompts TWIST data entry. Do not use for birth certificates.	Y
Community Partner FA	Tracking	Tracking	Tracking	Financial aid application and supporting documents for customers working with a community partner.	Y
Community Referral	Tracking	Tracking	Tracking	Any referrals received or sent to and from any community partner.	Y
Community Service Agreement	Tracking	Auto-Filed	N/A	Community Service Agreement	Y
Disaster Recovery - CO Eligibility	Tracking	Tracking	Tracking	Application and all attachments for jobs tagged in WIT; Tracking to ensure all notes and documentation meet eligibility criteria	Y
Global Cash	Tracking/ Financial Aid	Tracking / Fulfillment	Support Services / Work/Tmg Support	Include cash sub form and any additional documents needed to process request. Tracking will complete TWIST entry then use the 'Move' stamp to move the document to the call center fulfillment list	Y
Makeup Agreement	Tracking	Tracking	Tracking	Makeup Agreement	Y
Medical	Tracking	Tracking	Tracking	Medical documents. This label has restricted user view. Note: Do not use the 'Confidential' store dialog for customer Medical documents.	Y
Mobility Assessment	Tracking	Tracking	Tracking	Completed Workforce Solutions mobility options assessment form	Y
NCP Correspondence	Tracking	Auto-Filed	N/A	NCP Correspondence	Y
NCP Court Order	Tracking	Auto-Filed	N/A	NCP Court Order	Y
NCP Service Plan	Tracking	Auto-Filed	N/A	NCP Service Plan	Y
Parent Agreement - Tracking	Tracking	Tracking	Tracking	Signed 3 page parent agreement that goes to the tracking unit (Choices and SNAP E&T)	Y
Rescan-Tracking	Tracking	Tracking	Tracking	Corrected document - alerts tracking to check items that were stamped 'Office Action Needed'	Y
RESEA-Orientation	Tracking	Tracking	Tracking	Documents for rapid re-employment claimants who receive services at a career office. Documents may include signed employment plan, back to work agreement, addendum and Dislocated Worker supporting documents including authorization to work documents/checklist.	Y
School Letter - Schedule	Tracking	Auto-Filed	N/A	School Letter / Schedule Does not prompt data entry - DO NOT USE when customers provide a school schedule for continued child care assistance. Those should be labeled 'Updates'	Y
Self Emp Ent Verification	Tracking	Tracking	Tracking	Self Emp Ent Verification	Y
Snap Orientation (Brochure)	Tracking	Tracking	Tracking	Snap Orientation (Brochure)	Y
Special Projects	Tracking	Tracking	Tracking	Use only for special projects documents that go to the Tracking Unit	Y
Support Service	Tracking	Tracking	Support Services	Use for all support services other than Global cash and Training Check Requests : include any documents needed for data entry in addition to cash sub form	Y
TANF Orientation	Tracking	Tracking	Tracking	(2588 HHSC App + Brochure +Family Coop Agreement)	Y
Tests	Tracking	Tracking	Tracking	Any tests that were not needed to determine eligibility for Youth funding	Y
TIERS Printout	Tracking	Auto-Filed	N/A	TIERS Printout	N
Unit Transmittal	Tracking	Tracking	Tracking	Any documents needed to support a TWIST transaction or use to request action by the tracking unit (CSA)	Y
W42 RESEA Transmittal	Tracking	Auto-Filed	N/A	W42 Forms completed by career office staff	Y
Work-based Learning	Tracking	Tracking	Tracking	Use only for work-based learning documents other than those needed for eligibility determination.	Y
Work Hours	Tracking	Tracking	Tracking	Hours reported for employment or High School	Y

DISABILITY INTERVIEW FORM

Date: 1/6/17	FAS Name:	
Child's Name:	Child's DOB:	Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female
Parent's Name:	Phone Number:	
Public School (if applicable):	Name of child care provider:	
Public School Teacher:	Public School Phone No.	

YOUR CHILD'S DEVELOPMENT

Does your child have trouble in any of the following areas? Please check yes or no, and describe your concern. Please provide any additional information in the Comment Section. Use the back of this page if necessary.

Yes No **LANGUAGE/ COMMUNICATION** (Trouble talking, listening, following directions, etc.)

Yes No **SELF-HELP SKILLS** (Trouble eating, swallowing, drinking, toileting, dressing/undressing, etc.)

Yes No **HEARING** (Trouble due to hearing loss, frequent ear/throat infections, etc.)

Yes No **VISION** (Trouble seeing, etc.)

Yes No **COGNITIVE ABILITIES** (Trouble learning, reading, remembering names of objects, etc.)

Yes No **SOCIAL SKILLS** (Trouble focusing and sustaining attention, socializing with adult and peers, etc.)

Yes No **PHYSICAL (GROSS MOTOR/FINE MOTOR) DEVELOPMENT** (Trouble standing, sitting, walking, holding small objects, etc.)

OTHER INFORMATION

Yes No **SEIZURE DISORDER**

Yes No **BREATHING DIFFICULTY**

Yes No **OTHER PROBLEMS**

Yes No **MY CHILD IS BEING SEEN BY A THERAPIST**
 Physical Speech Cognitive Occupational Audiologist Other

Name of Therapist

Phone Number

1. _____
2. _____

- _____
- _____

COMMENTS: (List any medication, adaptive equipment, additional assistance you need, etc.)

Child Care Authentication Guide

Report	Identity Mismatch	Unemployment Insurance Early Warning	Child Care Income	Child Care Work and Training
<p>Frequency of Distribution</p> <p>Description</p>	<p style="text-align: center;">Weekly</p> <p>The report highlights customers (parent, child, or other family member) who are receiving financial aid for child care and may have identity mismatches as their information is verified electronically with federal databases.</p> <p>Four data elements are used in the matching process:</p> <ul style="list-style-type: none"> ➤ Social Security Number (SSN) ➤ Name ➤ Date of Birth ➤ Gender <ul style="list-style-type: none"> • If all four data elements match, the individual's identity is confirmed as valid. • If there are any mismatches, a mismatch report identifies the customers requiring verification of identity. 	<p style="text-align: center;">Twice a Month</p> <p>The report seeks to identify and assess customers receiving financial aid for child care who are potentially ineligible for child care services because they filed an unemployment insurance (UI) claim indicating they are not working or have had a reduction in work hours.</p> <p>The objective is to prevent overpayments by identifying customers before their interruption period expires.</p> <p>A customer identified in the report is not necessarily ineligible for services. Potential financial aid for child care eligibility issues are resolved by verifying the customers' employment/training status.</p>	<p style="text-align: center;">Quarterly</p> <p>The report identifies customers receiving financial aid for child care who were potentially ineligible for the financial aid due to parental/custodial changes or underreporting of income.</p> <p>A customer identified in the report is not necessarily ineligible for services; the issue of eligibility can be established only after a thorough review of the customer's file and may involve contacting the customer for further information.</p>	<p>Report will only be distributed when issues are identified</p> <p>The report detects customers receiving financial aid for child care who were potentially ineligible for the financial aid due to not meeting the low-income work and/or training eligibility requirement.</p> <p>A customer identified in the report is not necessarily ineligible for services; the issue of eligibility can be established only after a thorough review of the customer's file and may involve contacting the customer for further information.</p>

Child Care Authentication Guide

Report	Identity Mismatch	Unemployment Insurance Early Warning	Child Care Income	Child Care Work and Training
<p>Support Center Responsibilities</p>	<ol style="list-style-type: none"> Upon receipt of the Mismatch Report, review the documentation in customer's file containing the four data elements to determine whether a data entry error in TWIST caused the mismatch; If the file review confirms a data entry error occurred, enter the correct data into TWIST, Intake Common. For mismatches on Date of Birth, First Name and Last Name (Surname), SSN, or Gender, enter corrections into TWIST using the Intake Common menu on the Customer Information screen. The mismatched data remains in the report until a new Program Detail is created using the information in the Intake Common menu. If a date of birth for a child of a customer receiving financial aid for child care is incorrect and causes the provider to be paid at an incorrect rate, end the Program Detail and reestablish a new Program Detail with the correct information. 	<ol style="list-style-type: none"> Upon receipt of the Unemployment Insurance Early Warning Report, review customer's file to determine if information has been properly entered into the Intake Common - Family and Income tabs and Program Detail - Reason for Care field and Income tab. If information from customer's file is not properly entered into the Intake Common - Family and Income tabs, enter the correct information. If information from customer's file is not properly entered into the Program Detail - Reason for Care field and Income tab, update the correct reason for care. If information in the customer's file and TWIST record are correct, mail the customer a Discrepancy letter indicating we need updated information regarding his/her employment and/or training status along with appropriate documentation (i.e. check stub, school schedule, etc.). Enter a three-month interruption period beginning the first day after the last date of employment reported to UI. If the customer does not find employment or enter into a training program by the end of the three-month period, staff must end the service. Notify the customer of the interruption period and requirements to continue care. If customer submits requested information, update TWIST file as indicated in steps 2 and 3 above. If the customers last date of employment is greater than 90 days of the employment record reported to UI, call the customer 	<ol style="list-style-type: none"> Upon receipt of the Child Care Income Report, review customer's file to reassess his/her eligibility for financial aid (a) at the time of the request for financial aid for child care services or (b) current eligibility. Compare the information from the Child Care Income Report and the customer's TWIST file to determine if there are any discrepancies or eligibility issues. Staff must enter information in case notes subject line i.e. Income Exception (qtr and yr) The note must include your analysis. If there aren't any discrepancies and the customer's eligibility, currently or at the time of the request for financial aid is validated, no further action is necessary. If there are discrepancies or eligibility issues, mail the customer a Discrepancy letter indicating we need updated information regarding his/her employment and/or training status along with appropriate documentation (i.e. check stub, school schedule, etc.). The customer must respond to the Discrepancy letter within 15 calendar days from the date the letter was mailed. Staff must enter a case note indicating the last day of a response to the Discrepancy letter. The note must include your analysis. If customer does not respond to the Discrepancy letter within 15 calendar days, refer the issue to the Financial Aid Payment Office (FAPO) for fact finding within five business days. 	<ol style="list-style-type: none"> Upon receipt of the Child Care Work and Training Report, review customer's file to reassess his/her eligibility for financial aid at the time of the request for financial aid for child care services. Compare the information from the Child Care Work and Training Report and the customer's TWIST file to determine if there are any discrepancies or eligibility issues. If there aren't any discrepancies and the customer's eligibility at the time of the request for financial aid is validated, no further action is necessary. If there are discrepancies or eligibility issues, mail the customer a Discrepancy letter indicating we need updated information regarding his/her employment and/or training status along with appropriate documentation (i.e. check stub, school schedule, etc.). If customer does not respond to our Discrepancy letter within 15 calendar days, refer the issue to the Financial Aid Payment Office (FAPO) via FACS for fact finding.

Child Care Authentication Guide

Report	Identity Mismatch	Unemployment Insurance Early Warning	Child Care Income	Child Care Work and Training
<p>Support Center Responsibilities (continued)</p> <p>6. If the file review confirms the data was entered into TWIST correctly, but the data elements on the mismatch report do not correspond, mail the customer a Discrepancy letter and request any applicable documentation as indicated on the Acceptable Documentation Staff Guide on Page 5</p> <p>7. If customer does not respond to our Discrepancy letter within 15 calendar days, refer the issue to the Financial Aid Payment Office (FAPO) via FACS for fact finding.</p> <p>8. If customer submits requested information, update TWIST file as indicated in steps 3, 4, and 5 above.</p> <p>9. If during a mismatch review, we discover questionable information and/or potential fraud, such as a SSN is being used by more than one individual or employer, staff must immediately report this issue to the Financial Aid Payment Office (FAPO) via FACS within one workday after identifying the discrepancy.</p> <p>10. Update TWIST Counselor Notes regarding actions taken and resolution of the Identity Mismatch Report.</p> <p>11. Note all actions taken for each customer in the designated column on the Identity Mismatch Report.</p> <p>12. All actions must be completed and a final report must be submitted to the board designated staff within 45 calendar days from the date the report is received.</p>	<p>and confirm their status. If the customer is working or in an activity, request documentation. Customer has 3 days to submit the requested documentation. If the customer is not in an activity, did not submit documents within 3 business days or was not able to be reached, issue the 15-day closure letter and close the referral and child care program detail.</p> <p>8. If during the review, staff suspects questionable information and/or potentially fraudulent activity, staff must immediately report this issue to the Financial Aid Payment Office (FAPO) via FACS within one workday after identifying the issue.</p> <p>9. Update TWIST Counselor Notes regarding actions taken and resolution of the Unemployment Insurance Early Warning Report.</p> <p>10. Note all actions taken for each customer in the designated column on the Unemployment Insurance Early Warning Report, including when discrepancies are not found.</p> <p>11. All actions must be completed and a final report must be submitted to the board designated staff within 45 calendar days from the date the report is received. Actions include but not limited to: (a) referral for fact finding, (b) initiating an interruption period, (c) determined eligible, no action required.</p>	<p>6. If customer submits requested information and is determined ineligible due to a permanent change in employment or earnings causing the customer to be over 85% SMI, issue the 15-day termination letter and close the referral and the Child Care Program Detail. Refer the customer to the Financial Aid Payment Office (FAPO) via FACS for fact finding.</p> <p>7. If during a review, staff suspects potentially fraudulent activity, staff must immediately report this information to the Financial Aid Payment Office (FAPO) within one workday after identifying the issue.</p> <p>8. If customer submits requested information and there are no issues or all issues are resolved, no further action is necessary.</p> <p>9. Update TWIST Counselor Notes regarding actions taken and resolution of the Child Care Income Exception Report.</p> <p>10. Note all actions taken for each customer in the designated column on the Child Care Income Exception Report.</p> <p>11. All actions must be completed and a final report must be submitted to the board designated staff within 45 calendar days from the date the report is received.</p>	<p>6. If customer submits requested information and there are no issues or all issues are resolved, no further action is necessary.</p> <p>7. If customer submits requested information and we identify an eligibility issue due to staff error, notify Kenny Chin.</p> <p>8. If during a review, staff suspects potentially fraudulent activity, staff must immediately report this information to the Financial Aid Payment Office (FAPO) via FACS within one workday after identifying the issue.</p> <p>9. Update TWIST Counselor Notes regarding actions taken and resolution of the Child Care Work and Training Report.</p> <p>10. Note all actions taken for each customer in the designated column on the Child Care Work and Training Report.</p> <p>11. All actions must be completed and a final report must be submitted to the board designated staff within 45 calendar days from the date the report is received.</p>	

Child Care Authentication Guide

Report	Identity Mismatch	Unemployment Insurance Early Warning	Child Care Income	Child Care Work and Training
<p>Financial Aid Payment Office (FAPO) Responsibilities</p>	<ol style="list-style-type: none"> 1. Staff must record an issue identifying questionable information and potential fraudulent activity in the Program Integrity Reporting Tracking System (PIRTS) within two business days of receipt. 2. The Financial Aid Payment Office must conduct fact finding within 30 days of receipt of an issue and determine if the customer: <ol style="list-style-type: none"> a. Committed fraud <ul style="list-style-type: none"> • If the Payment Office determines the customer did commit fraud, the Payment Office will submit this determination to Board Staff for action. <ol style="list-style-type: none"> i. If the Board does not agree with the determination of fraud, Payment Office staff will record this outcome in PIRTS. ii. If Board Staff concurs with the determination of fraud, Board Staff will notify the Payment Office which will: <ol style="list-style-type: none"> 1) Notify the customer, provide an opportunity to appeal (Appeal Form A1) and begin recoupment efforts. 2) Notify the Financial Aid Support Center via FACS. The Support Center must, within 24 hours, end the referral, terminate the Program Detail for child care financial aid and send 2450 to the provider. b. Did not commit fraud and customer remains eligible. <ul style="list-style-type: none"> • If the Payment Office determines the customer did not commit fraud, record this outcome in PIRTS and notify the Financial Aid Support Center via FACS the customer remains eligible. c. Did not commit fraud but is ineligible due to a permanent change in employment or earnings causing the customer to be over 85% SMI. <ul style="list-style-type: none"> • If the Payment Office determines the customer did not commit fraud but is ineligible due to a permanent change in employment or earnings causing the customer to be over 85% SMI, record this outcome in PIRTS. • Payment Office staff must notify the Financial Aid Support Center via FACS. The Support Center must, within 24 hours, end the referral, terminate the Program Detail – child care financial aid, send 2450 to the provider, and provide the opportunity to appeal (Appeal Form A1). 3. Update TWIST counselor notes and the FAMS record regarding recoupment status and any actions taken. 4. If an identity mismatch affects the customer's eligibility for child care financial aid, the customer is ineligible to receive child care financial aid during an appeal. 			

Child Care Authentication Guide

Acceptable Documentation for Verifying Identity during Identity Mismatch Review Staff Guide

The *Identity Mismatch* report compares federal databases and identifies customers (parent, child, or other family member) who may have identity mismatches. Four data elements are screened during the electronic matching process:

- Social Security Number (SSN)
- Date of Birth
- Name
- Gender

All four data elements must match for the customer's identity to be considered valid.

When a customer is flagged on the *Identity Mismatch* report, the customer may need to submit additional documents to resolve identity mismatch issues.

Below is a list of acceptable documents customers may provide to settle identity mismatch concerns:

1. U.S. Passport*
2. State driver's license*
3. Government-issued identification (ID) card*
4. School ID card*
5. U.S. military card or draft record
6. Birth certificate
7. Military dependent's ID card*
8. Native American Tribal document/card (I-872)
9. U.S. Coast Guard Merchant Mariner ID card*
10. Certificate of Degree of Indian Blood or another U.S. American Indian/Alaskan Native and Tribal document*
11. Adoption papers or records
12. Employee ID card*
13. Signed application for Medicaid—signature of an authorized representative acting on the individual's behalf is acceptable
14. Certificate of U.S. citizenship* (N-561)
15. Lawful permanent resident card, also known as a green card* (I-551)
16. Employment authorization card (I-766) *
17. Certificate of birth, issued by a foreign service post (FS-545)
18. Temporary Assistance for Needy Families, Supplemental Nutrition Assistance Program benefits (i.e., food stamps), or other related public assistance records
19. Foreign passport* combined with Form I-94 Arrival/Departure Record
20. Travel document card*

*Issued with a photograph

ATTENDANCE and PROGRESS REPORT

Student Name: Ineeda Success	Telephone: 713-777-9311
Address: 1111 Main St. Gotham City, TX 77777	Student ID: 9999999

Course (Example ITSC 1301)		ITSC 1301						
Day Scheduled (Circle):		Days Attended (Check):						
		S	<input checked="" type="checkbox"/> M	T	<input checked="" type="checkbox"/> W	T	<input checked="" type="checkbox"/> F	S
Is the student making satisfactory progress? <input checked="" type="radio"/> Yes <input type="radio"/> No	Week Ending (Sun - Sat)	06/11/2016	√		√		√	
		06/18/16	√		√		√	
		06/25/16	√		√		√	
		Student is on schedule to complete course/training in agreed timeframe. <input checked="" type="radio"/> Yes <input type="radio"/> No Advisor/Instructor's Signature: _____ Title: _____ Date: ____/____/____						

Course (Example ITSC 1301)		ITSC 1305						
Day Scheduled		Days Attended (Check):						
		S	M	<input checked="" type="checkbox"/> T	W	<input checked="" type="checkbox"/> T	F	S
Is the student making satisfactory progress? <input checked="" type="radio"/> Yes <input type="radio"/> No	Week Ending (Sun - Sat)	06/11/16			√		√	
		06/18/16			√		√	
		06/25/16			√		√	
		Student is on schedule to complete course/training in agreed timeframe. <input checked="" type="radio"/> Yes <input type="radio"/> No Advisor/Instructor's Signature: _____ Title: _____ Date: ____/____/____						

Course (Example ITSC 1301)		INW 1323						
Day Scheduled		Days Attended (Check):						
		S	<input checked="" type="checkbox"/> M	T	<input checked="" type="checkbox"/> W	T	<input checked="" type="checkbox"/> F	S
Is the student making satisfactory progress? <input checked="" type="radio"/> Yes <input type="radio"/> No	Week Ending (Sun - Sat)	6/11/16	√		√		√	
		6/18/16	√		√		√	
		6/25/16	√		√		√	
		Student is on schedule to complete course/training in agreed timeframe. <input checked="" type="radio"/> Yes <input type="radio"/> No Advisor/Instructor's Signature: _____ Title: _____ Date: ____/____/____						

Course (Example ITSC 1301)		ITCC 1242						
Day Scheduled		Days Attended (Check):						
		S	M	<input checked="" type="checkbox"/> T	W	<input checked="" type="checkbox"/> T	F	S
Is the student making satisfactory progress? <input checked="" type="radio"/> Yes <input type="radio"/> No	Week Ending (Sun - Sat)	06/11/16			√		√	
		6/18/16			√		√	
		6/25/16			√		√	
		Student is on schedule to complete course/training in agreed timeframe. <input checked="" type="radio"/> Yes <input type="radio"/> No Advisor/Instructor's Signature: _____ Title: _____ Date: ____/____/____						

Student's Signature: _____
Date: ____/____/____

Workforce Solutions is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. Relay Texas Numbers: 1-800-735-2989 (TDD) 1-800-735-2988 (voice) or 711



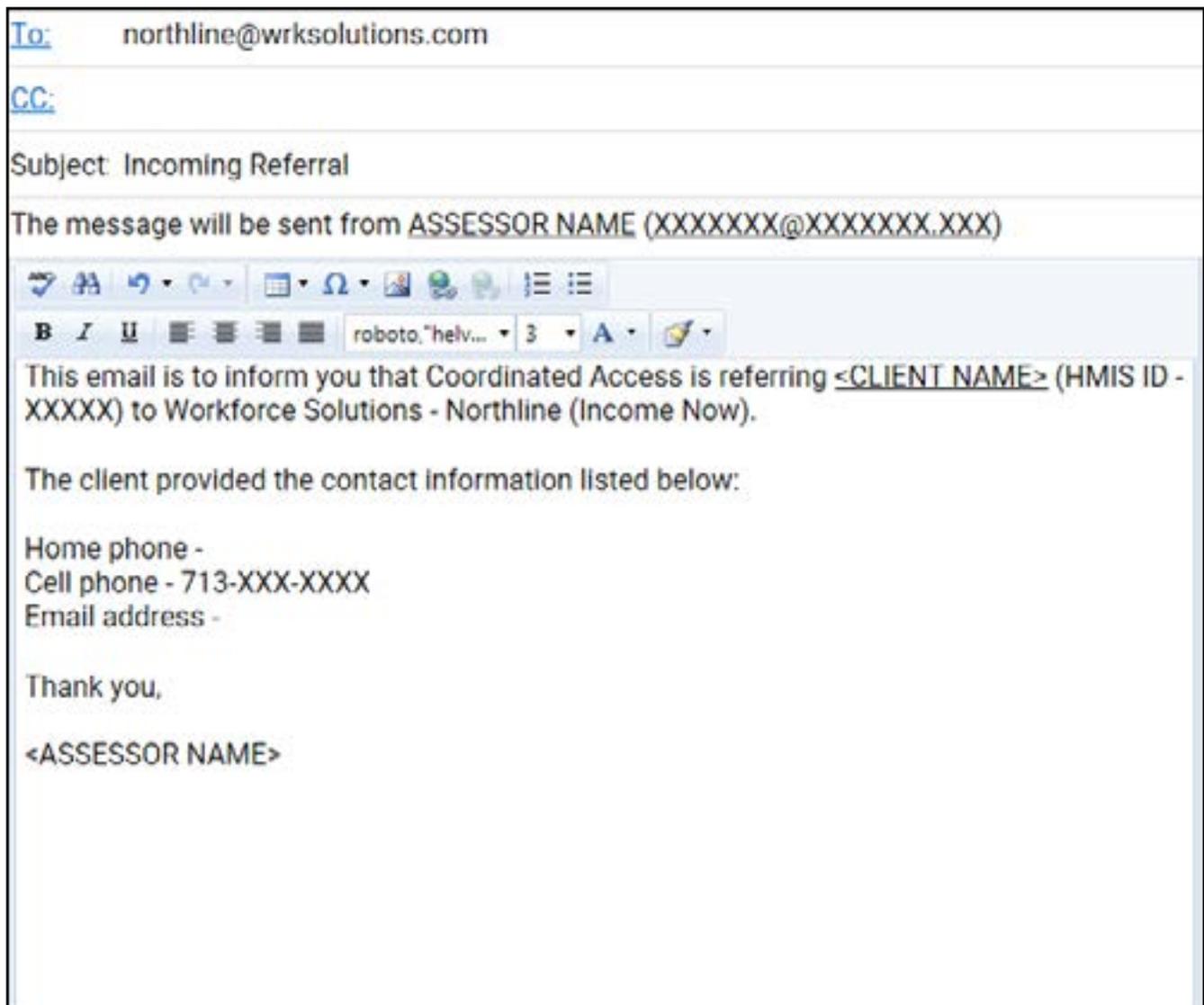
06/06/16

Child Care Match

Fund	Status	Contact Info.
Aldine ISD Teen Parents & Staff		Charity White 713-334-5980 x217
Alief ISD Teen Parents & Staff		Fedora Alfred 713-334-5980 x181
Brazosport College Students and Staff		Charity White 713-334-5980 x217
Channelview ISD Students and Staff		Fedora Alfred 713-334-5980 x181
City of Houston/ASP YMCA Summer Program		Charity White 713-334-5980 x217
Clear Creek Teen Parents & Staff		Fedora Alfred 713-334-5980 x181
College of The Mainland Students and Staff		Fedora Alfred 713-334-5980 x181
Conroe ISD Teen Parents & Staff		Charity White 713-334-5980 x217
Cypress Fairbanks ISD Teen Parents & Staff		Charity White 713-334-5980 x217
Fort Bend ISD Teen Parents		Charity White 713-334-5980 x217
Galena Park ISD Teen Parents & Staff		Charity White 713-334-5980 x217
Galveston ISD Teen Parents & Staff		Fedora Alfred 713-334-5980 x181
Goose Creek ISD Teen Parents & Staff		Fedora Alfred 713-334-5980 x181
Lee College Students and Staff		Fedora Alfred 713-334-5980 x181

Fund	Status	Contact Info.
HCC System Cert Students & Staff		Charity White 713-334-5980 x217
Houston ISD Teen Parents & Staff		Fedora Alfred 713-334-5980 x181
Katy ISD Teen Parents & Staff		Charity White 713-334-5980 x217
Klein ISD Teen Parents & Staff		Charity White 713-334-5980 x217
Lamar Consolidated ISD Teen Parents & Staff		Fedora Alfred 713-334-5980 x181
San Jacinto CC District Students & Staff		Fedora Alfred 713-334-5980 x181
Spring ISD Teen Parents & Staff		Charity White 713-334-5980 x217
Spring Branch ISD Teen Parents & Staff		Charity White 713-334-5980 x217
TSU Students & Staff		Fedora Alfred 713-334-5980 x181
UH Students & Staff		Fedora Alfred 713-334-5980 x181
UH Clearlake Students & Staff		Fedora Alfred 713-334-5980 x181
Harris County Dept. of Education		Charity White 713-334-5980 x217
Pearland ISD Teen Parents		Fedora Alfred 713-334-5980 x181
Wharton Junior College Students & Staff		Charity White 713-334-5980 x217

Sample Referral Email from Coordinated Access



Sample Referral Form from Coordinated Access

Referral Voucher



Name: [REDACTED]
Social Security Number: XXX-XX-[REDACTED]
Date of Birth: [REDACTED]

Referred To: Workforce Solutions - Northline (Income Now)
Address: 4424 North Freeway, Suite A
Houston, TX 77022
Telephone Number: 713-692-7755
Fax:

Contact: WFS Northline
Email:
Phone: 713-692-7755

Service: Income Now Referral
Result:
Referral Date: 5/12/2017
Referred By: Coordinated Access
Staff Name: [REDACTED]
Comments:

Voucher Number:
Units:
Unit Value:

Total:

Qualifications for Child Care Checklist

Customer Name																			
TWIST ID																			
SSN last 4 digits																			
Application																			
Orientation to Complaint																			
Parent Agreement																			
School Hours																			
Employment Hours																			
Residency																			
Family Size																			
Income																			
Children(s) Ages																			
Citizenship of children(s)																			
Eligible?																			
Letter Sent																			
Notes																			
Complete																			