Workforce Solutions

Standard # --- Expanded Services

I. Standard

Expanded Services are available to help every customer who wants and needs career advice. Expanded services also help residents learn how to search for work and how to land a job offer. Every customer who wants and needs it will have the opportunity to receive a series of basic and expanded services from Workforce Solutions professional staff.

II. Background

Workforce Solutions classifies the services provided residents into three categories based on the level of resources required to provide them-***basic services, expanded services and financial aid*****.** Every service provided by Workforce Solutions fits into one of these three categories. The second level of services, ***expanded services***, requires more staff assistance and expertise than the basic services. Staff who provide expanded services must have extensive knowledge about careers, the local labor market, and how to land a job. Expanded services help customers who are ready to work and those who are not. Customers with good marketable skills are advised on how to make the most of those skills in the marketplace. Customers, who are not ready to work, or look for work, may receive help from Workforce Solutions Personal Service Representatives to develop and follow a plan leading to employment.

Each office has staff members with primary responsibility for providing some expanded services to the customers who want and need them. We expect staff members to become experts in providing the services for which they have primary responsibility. Employment Counselors are expert in helping customers who are ready to work find the best possible job and career. Personal Service Representatives help customers who need continued guidance or preparation in moving into a successful work life. Testing and Assessment Specialists and Facilitators work with both groups of customers to guide career choices and prepare for successful interviews. Program Tracking Specialists record events and watch to assure that customers and staff follow funding requirements. The “Trackers” allow Workforce Solutions customer service staff to concentrate on providing each customer the service she wants and needs to meet her work goals.

III. Description of Expanded Services

Expanded services are available to all customers who want and need them. A significant number of customers in our system receive some or all of these services. Many of the expanded services entail working with a customer to determine her career direction and helping her know how to land the job she wants. Many young people are just beginning to make career choices and they would benefit from expanded services. Young people, often without much work experience, will benefit from financial aid for scholarships as well.

Expanded services include following:

- Skills Assessment
  - ✓ Formal assessment (ability, aptitudes, interests) using recognized testing instruments
  - ✓ Identification of Skills (acquired and transferable)
- Individualized/Specific Labor Market Information
- Individualized Job search and Job Development
- In-depth Job Search Seminars
  - ✓ Completing Application
  - ✓ Interviewing Techniques
  - ✓ Tailoring Resumes
- Employment/Career Planning
  - ✓ These services are available to adults and youth
  - ✓ Youth who are still in school may receive the services through information provided by Workforce Solutions to school districts, school counselors and teachers
- Networking
- Assistance in Obtaining Support Services from the Community
- Financial Aid Assistance
  - ✓ Identifying and /or Obtaining Financial Assistance for Education or Support Services needs Including Child Care
- Staff-assisted job referrals resulting from screening customers for employers who have special arrangements with Workforce Solutions – Usually mass on-site interviewing for the employer

- Help for young people to stay in school – Workforce Solutions may provide tutoring, mentoring, remedial classes, credit recovery, English as a second language, internships and other expanded services that help youngsters stay in school. We also provide the basic service of helping young students to find appropriate part time work.

IV. Key steps in the Service Process

The following principles apply to customer service in Workforce Solutions category of Expanded Services.

1. All customers who receive a continuing series of basic and expanded services from Workforce Solutions staff are aiming toward an offer of work in the best job they are qualified to perform.

2. Each customer makes decisions about the mix of services that she wants with the professional advice of Workforce Solutions staff.

3. When there is the possibility that the customer may lose a financial benefit for choosing not to follow the advice of Workforce Solutions staff, the consequences of that choice must be made clear to the customer.

4. Workforce Solutions continues to be available to help our customers keep the job or get a better job after beginning work.

Steps in the Service Process – Expanded Services

1. ***Workforce Solutions Employment Counselor or other staff member provides a continuing series of basic and expanded services to a job ready customer.*** The customer has spoken to an Employment Counselor or other Workforce Solutions professional and the two are in agreement that the customer is ready to look for work. The customer knows what kind of work she prefers and is qualified to perform the work. Both she and the Employment Counselor believe her pay and other job requirements are realistic. The customer has chosen to keep in close contact with Workforce Solutions staff member until she becomes employed. She will take advantage of the services, basic and expanded, that she believes will help her to get an offer for the kind of job she wants. The customer and the Employment Counselor will evaluate what they believe may be standing in the way of work opportunities and decide which of Workforce Solutions services might address the problem. They will also determine what job search efforts seem to get positive employer response and continue to incorporate those into the entire search.

   A series of expanded services may be planned to address the customer's needs or she may decide to take advantage of one service, for example, attendance at a seminar on how to interview, and then evaluate the need for additional services after feed back from future interviews. Job matches and referrals to employers from Workforce Solutions database are always provided as part of the service package. A formal employment plan is not necessary to guide most work ready customers' job search. A short summary statement of the services planned should be included in the counselor notes if it is not clear from other records what direction the services are leading the customer.

The Employment Counselor or other staff member assures that the customer understands the next step in working with The Work Source. If she is scheduled to return an appointment card is provided and the staff member offers a business card.

2. ***Workforce Solutions Employment Counselor or other staff member helps the customer access supportive services that will allow her to begin to look for work or to work***. The customer has spoken to an Employment Counselor or other Workforce Solutions professional and they are in agreement that the customer is prepared to work but needs some supportive services before beginning her job search or before accepting a job. The Employment Counselor may refer the customer to an outside organization for the needed help. The customer may need temporary housing, food, clothes, medical attention, or other personal help before she can begin a job search. When the needed services are not provided by Workforce Solutions - or are more easily provided by another organization - Workforce Solutions staff member will refer the customer to the appropriate organization. Someone on Workforce Solutions staff will call the organization to assure the needed service is available before sending the customer. The staff member should check back with the organization or the customer to assure that the needed service was received. Checking to see that services were received assures that this customer is getting help and also provides information to Workforce Solutions staff about the quality of service provided by service organizations on our referral lists.

   Workforce Solutions provides financial aid for some supportive services. Payments for child care and transportation are available to many of our customers when the customer requests and needs those services. Customers who sign the work application or addendum may receive up to $200 a year from Workforce Solutions to pay for job related expenses. (*See Current Standard and Guideline 316. A new standard addressing all financial aid will replace this one in the near future*.) Customers may receive services and ongoing transportation assistance at the most convenient Workforce Solutions office once the payments have been approved by any of our offices.

   When the Employment Counselor or other Workforce Solutions staff member knows that supportive services are readily available she provides work search advice and job referrals immediately. She provides a series of basic and expanded services when the customer wants to form a continuing relationship with Workforce Solutions to guide her work search.

   The Employment Counselor or other staff member assures that the customer understands the next step in working with The Work Source. The staff member offers a business card and if the customer is scheduled to return an appointment time and date are written as a reminder for the customer.

3. ***Workforce Solutions Personal Service Representative begins to provide direction; advice and counseling to customers who are not yet ready to work or look for work.*** The Employment Counselor or other Workforce Solutions professional has determined that the customer is not ready to begin job interviews or she is not prepared to begin work. There

are many reasons that an individual may need help in preparing to look for work and to work before beginning interviews. These may include lack of interest in pursuing work or insistence on looking for work for which the customer clearly is not qualified. Other barriers may include serious personal difficulty and lack of marketable skills. Customers not prepared to interview for work who want to continue to look for work through Workforce Solutions are provided the most comprehensive staff services to prepare them for entry into the workplace. A Personal Service Representative (PSR) has the responsibility for guiding these customers through the array of services offered by Workforce Solutions and other community organizations until they become employed in work that allows self-sufficiency. Many young people benefit from the advice and guidance of a Personal Service Representative. Often financial aid for scholarships in a chosen career, in conjunction with part time work, is a valuable benefit to someone at the beginning of her work life.

Often difficulties hindering a successful work search are apparent the first time an Employment Counselor interviews a customer. Sometimes problems preventing a customer from looking for work or from working are not evident until the staff member comes to know the customer better. The services of a PSR will be offered whenever it becomes clear that a customer is unlikely to find work because of one of the following:

- ✓ Education is necessary to provide skills needed to obtain employment
- ✓ Personal problems are such that the customer cannot work or look for work
- ✓ Extensive direction in the form of a formal employment plan is needed to move the customer toward success.
- ✓ The customer continues to have unrealistic expectations of salary and occupation relative to her skills or is uncooperative in looking for work.

The Personal Services Representative or other staff member assures that the customer understands the next step in working with The Work Source. If she is scheduled to return an appointment card is provided and the staff member offers a business card.

4. ***A comprehensive assessment, usually including testing, helps to determine the customer's career goals and what will allow her to reach them.*** A desk aid that is provided in this standard will help Personal Service Representatives identify what each customer wants to achieve in her work life and the barriers that may prevent the customer from becoming successful. (*See Information Resources for Staff VIII.A. Comprehensive Needs Assessment Desk Aid*). Once the customer goal is established and the barriers identified the customer and PSR are ready to make an employment plan to guide the customer to success. *(See Information Resources for Staff VIII.B. Identifying Barriers to Employment)*

5. ***Formal Employment Planning is provided to guide customers not ready to work through a series of steps to help meet long-term career goals.*** Some customers who are not work-ready sign an Employment Plan/Family Employment Plan during an orientation to give the customer information about her responsibilities to cooperate with Workforce Solutions in order to get a benefit. The PSR and the customer work together to supplement

the items included in any Employment Plan/Family Employment Plan signed during an orientation. They develop a more comprehensive plan to include the following:

- ✓ The plan summarizes the customer's information about relevant job skills and job interests and decisions about employment goals.
- ✓ The long-term or ultimate goal will provide self-sufficiency to the customer and her family.
- ✓ All long-term goals will include the occupation – kind of job - the customer wants to obtain. The goal may often also state a particular industry.
- ✓ The plan provides a guide including short-term goals leading to the ultimate or long-term goal. A time line provides targeted dates to achieve each part of the plan.
- ✓ Supportive services needed are identified and included in the plan.
- ✓ Testing is offered to help to identify realistic goals and barriers.
- ✓ The plan is flexible enough to allow for changes whenever circumstances result in a need for change.
- ✓ Employment plans must always be reviewed and updated when the customer goes to work.

6. ***Post employment counseling and planning reminds the customer that this job may be only one step to achievement of her long–term goal.*** Workforce Solutions begins to help the customer to keep a job. Also to get a better job if this one does not meet the customer's long term goal.

   - ✓ *Keep a Job* - Workforce Solutions can provide customers who want and need it up to $200 in any 12-month period to pay for work related expenses such as physicals, uniforms, temporary transportation costs, tools, and payment for vocationally necessary exams including the GED. Workforce Solutions professional staff can provide counseling to help the customer cope with work and home responsibilities. Recommendations for child care arrangements that provide quality care during the hours that a parent is at work are available.

   - ✓ *Get a Better Job* - Workforce Solutions is available to help a working customer update a resume to include new skills and experience. Professional counselors are available to help the customer to figure out what new career ladders may be open to her as she gains work experience. Advice and sometimes scholarships for training may allow a customer to move to the next level from her current job. She may want to advance with her current employer or another one.

V. Performance Measures Associated with this Standard

1. Measurement of progress toward the Board's Target for "More and Better Jobs" and "Higher Incomes" in under development. Workforce Solutions expected contribution toward meeting these goals is part of the measures being developed. Office contribution toward these goals will become part of the performance measure for this Standard.

2. Monitoring visits will determine an office's proficiency in providing expanded services. A monitoring instrument will be developed to follow the process outlined in this standard. The review will include the activities of those responsible for primary delivery of expanded services.

3. Employment Counselors and Personal Service Representatives in every office - major providers of expanded services - will be given the same job descriptions and performance expectations. Program Tracking Specialists- who keep records associated with customer service – will also have a common job description and performance expectations. Job descriptions and performance expectations will be found in attachments to this standard. The above mentioned staff will have their individual job performance measured according to the performance expectations in the Standard. Individual monetary compensation including merit increases, as well as continued employment, will depend on that performance.

VI. Data entry and reporting requirements

1. **<u>Determining which customer is tracked in TWIST and which in WorkInTexas.com</u>. –** All customers who agree to receive the continuing series of basic and expanded services are tracked in TWIST/Program Detail and have a work application in WorkInTexas.com. Customer services tracked in one MIS can be viewed in the other. At least one service must be entered into TWIST/Program Detail/Service Tracking. The service posted to TWIST assures that the customer will be included in the performance measures, as required, of the funding source paying for the service.

   Some customers are required to come to Workforce Solutions to obtain or retain benefits. These customers must be tracked in TWIST regardless of the level of services needed. Customers who must be tracked in TWIST include:

   - ✓ TANF applicants, recipients, and some former recipients
   - ✓ Food Stamp recipients recruited by Workforce Solutions
   - ✓ Ex-offenders who report to Workforce Solutions after referral from the Justice System
   - ✓ Ex-offenders who have volunteered upon release from prison to report to Workforce Solutions
   - ✓ Customer's receiving scholarship assistance paid by TAA
   - ✓ Customer's receiving any financial aid over $200 a year from Workforce Solutions.
   - ✓ Customer's receiving a continuing series of basic and expanded services

Note - Information on how to data enter a customer record in TWIST can be found in the Information Resources for Staff section of the Basic Services Standard.

2. **<u>TWIST Counselor Notes</u> –** All counselor notes will begin with the date and counselor name. Usually the initial entry into the counselor notes provides a short summary of the services planned and why the customer wants and needs them. The initial counselor note statement is used for customers, who have agreed to receive a series of expanded and basic services, working with Workforce Solutions EC or PSR, until finding acceptable work. When the initial statement concerns a customer not yet ready to work or look for work it should summarize why the customer is not yet ready. If the barriers or problems are in the Employment Plan (TWIST service plan) the notes may direct the reader there.

   - ✓ Additional counselor notes should appear in chronological order and show changes in the direction of the service process and the reason for those changes. Usual changes in direction of services include personal circumstances; decisions to change career paths, decisions to stop looking for work, decisions that Workforce Solutions services are no longer wanted or needed, or the next step in keeping a job or looking for a better job after the customer accepts work.

   - ✓ Counselor notes will reflect information received from a customer who responds to a letter warning of a benefits loss. The notes would include information about part time work, promise to begin cooperation, reason for good cause for not cooperating, and other pertinent parts of the conversation and expected next step.

- ✓ Counselor notes will also state monthly the reasons that a customer required to cooperate with Workforce Solutions to retain benefits is not preparing for work.

- ✓ Employment information that does not come from a direct placement but will be entered into TWIST may be further explained in the counselor notes if it will help in the provision of post employment services.

The following are two examples of statements to illustrate initial TWIST counselor notes for a customer who wants a continuing series of expanded and basic services.

> "*Sally Brown would like to use skills gained in previous jobs to begin to look for work as a technical writer in the oil industry. While continuing to job search, she will participate in workshops to develop a new resume, learn more about how her skills might apply to other occupations and industries and possibly take an interest-inventory test. Should she determine that this course of action is not producing the desired results, we will discuss another direction."*
>
> *"Sally Brown will attend a one day seminar on improving interviewing skills. Other services will follow if employer response at interviews leads her to believe she needs additional instruction."*

In the first example a series of services was initially planned. In the second example the customer said that she wanted to work through her job search by continuing to work with Workforce Solutions staff but wanted to try one service before determining what should come next.

It is not necessary to enter the initial statement of services planned when other entries in any Workforce Solutions MIS make it completely clear what direction the services are leading the customer. An example of a situation that would not require counselor notes follows:

Sally Brown completed a job application on her first visit to Workforce Solutions several months ago. WorkInTexas.com indicates a long list of job referrals all with the result marked "not hired". Ms. Brown appears to have the qualifications required on the job postings. A new program detail in TWIST has been created that shows the customer has begun to attend seminars.

In the example above it is assumed that this customer is beginning to take advantage of Workforce Solutions expanded services seminars because she has been unsuccessful in finding work to date.

- ✓ Information in the counselor notes must not duplicate what is found in other parts of any of Workforce Solutions Management Information Systems - TWIST, WorkInTexas.com, or The Child Care management system.

- ✓ The counselor notes should **not** include information indicating that an effort was made to call the customer but no conversation took place. It should **not** include statements indicating that there has been no change in the customer's planned course of action or circumstances.

Workforce Solutions customer service personnel providing the service will almost always enter information into the TWIST counselor notes. A Program Tracking Specialist may sometimes data enter counselor notes – written by the service provider staff - from the customer's initial visit to Workforce Solutions at the time that she is data entering all other initial data.

3. **Employment Plan –** Employment plans are an agreement between the customer and Workforce Solutions about the path that the customer will follow to a successful work life. Some Employment Plans are more comprehensive than others. Some are recorded in TWIST and some are maintained in a customer's individual paper file.

- ✓ *Signed Paper Employment Plan* – These plans are found in the Workforce Orientation brochures for TANF applicants, some Food Stamp Recipients, and some Ex-offenders. The plans identify the customer's responsibility in working with Workforce Solutions to job search. The brochures for TANF applicants and Food Stamp recipients are placed in an individual file folder. Ex-offender signed brochures are kept in an alpha file centrally located in each office.

Family Employment Plan - TANF Applicants and Recipients – Customers required to search for work in order to receive TANF benefits must have a signed Family Employment Plan. Customers who volunteer to allow Workforce Solutions to help them find work while receiving TANF benefits must also have a signed Family Employment Plan. The brochure given to these customers during orientation (group or individual) includes a Family Employment Plan. A Customer must sign this plan each time HHSC refers her to Workforce Solutions as part of the TANF application process. The customer maintains a copy of the signed plan that is part of the brochure "Work Orientation" and Workforce Solutions maintains a signed copy for the customer's individual file folder.

Employment Plan -Food Stamp Recipients - Food Stamp recipients who are required to look for work with the help of Workforce Solutions in order to continue to receive Food Stamps must have a signed Employment Plan. The brochure "Work Orientation" given to food stamp recipients during orientation (group or individual) includes an Employment Plan. Each customer must sign this plan when she responds to Workforce Solutions letter inviting her to the office to begin work search efforts. The customer maintains a copy of the signed plan that is part of the brochure "Work Orientation" and Workforce Solutions maintains a signed copy for the customer's individual file folder.

Employment Plan – Ex-offenders – Ex-offenders referred to Workforce Solutions by the criminal justice system must have a signed Employment Plan. The brochure "Work Orientation" given to these customers during orientation (group or individual) includes an Employment Plan. Each customer must sign this plan during the orientation. The customer maintains a copy of the signed plan as part of the brochure "Work Orientation" and Workforce Solutions maintains a signed copy in an alpha file located centrally in each office.

- ✓ *TWIST Employment Plan/Family Employment Plan/Service Plan* – Customer's who are not ready to look for work or to work require the help of a Personal Service Representative to develop a formal employment plan. The plan will identify barriers to a successful work life and a path to overcome the barriers. It will provide the customer a guide to accomplish both long and short-term goals. The formal TWIST plan complements any existing signed paper employment plan.

Customers who are receiving financial aid in the form of scholarships funded by Workforce Solutions will always have a formal employment plan.

The PSR will enter the employment plan into TWIST. It is not necessary to keep a signed paper copy of the plan in the customer file folder. The Personal Service Representative may provide a paper copy of the plan to the customer as a reminder of the path the customer has determined to follow.

4. **Testing** – Test information and scores will be entered into TWIST/Assessment/Testing. Tests will be used to help the customer and Workforce Solutions staff determine work interests and aptitudes as well as basic education needs. The employment plan should reflect the information gained by testing. Action steps in the employment plan will reflect that deficiencies in basic skills are being addressed.

   The Testing and Assessment Specialist or the PSR will usually data enter test scores into TWIST.

5. **Customer Services – TWIST and WorkInTexas.com entry** – Services should be entered into either TWIST or WorkInTexas.com. It is generally not necessary to enter the same service into both systems.

- ✓ *WorkInTexas.com* – After the work application has been entered into WorkInTexas.com services may be data entered into the MIS. Entry into the WorkInTexas.com services requires access to the customer application usually by keying the Social Security number. Choose the appropriate service from the drop down box in WorkInTexas.com

- ✓ *TWIST/Service Tracking* - Services for customers who are receiving a series of expanded services and who want to continue working closely with Workforce Solutions counselors must be entered into TWIST/Program Detail/Service Tracking. Program Type must indicate one of the programs tracked in TWIST and at least one service must be data entered to one of the funds tracked in TWIST (WIA, Choices, FSE&T, RIO, TAA). Customers required By HHSC or the Criminal Justice System to work with Workforce Solutions must also be tracked in TWIST regardless of the level of services received. Youth who are tracked in TWIST under WIA/Youth for the receipt of expanded services must complete an Application for Financial Aid. Youth tagged in TWIST as WIA/Youth they must meet poverty guidelines. Most out of school youth who are tagged as WIA/Youth will also receive financial aid. See VIII. K. Information Resources for Staff/Adding a TWIST record in the Basic Services Standard.

In most cases the customer service personnel (EC, PSR, and Financial Aid Specialist) who provide a service will enter the information into one of Workforce Solutions management information systems. If the service is provided on the customer's first visit to Workforce Solutions a Program Tracking Specialist may enter the services at the same time that she data enters the work application and TWIST program detail.

6. **Financial Aid (Supportive Services) - TWIST, Child Care Management Information System, Financial Aid Application, other financial documents** - Workforce Solutions provides financial aid to customer's who want and need it to find or accept suitable employment. This aid comes in many forms. Most commonly Workforce Solutions financial aid subsidizes needy customer's child care expenses, pays travel costs for customers to look for work, prepare for work, or work, pays tuition for customer's without marketable skills to go to school, and pays other work related expenses. Every customer who receives financial aid from Workforce Solutions must have that aid tracked as a payment to the customer. All financial aid except child care is tracked in TWIST to a customer with a record in Program Detail under one of Workforce Solutions funding streams.

   ✓ *TWIST* – All financial aid is recorded in TWIST/Support Services except tuition assistance. Customers may receive aid costing $200 or less in a twelve-month period without completion of a Financial Aid Application. Aid in excess of $200 during any 12 month period requires completion of the Financial Aid application. Staff members must check TWIST before approving aid without the application to assure that the total will not exceed $200. Customers may receive ongoing financial aid for transportation at any office once it has been approved by one. Each office must enter aid received and any hours of cooperation for other offices to view.

   A Financial Aid Application must be included in the customer's individual file folder indicating eligibility to receive aid in amounts over $200 a year. Documents proving information on the application are attached to the application in the file folder.

   Scholarships provided by Workforce Solutions are recorded in TWIST/ITA/Financial Asst. The expected amount of aid is data entered in the ITA tab and withdrawals from the total are data entered as they occur.

   A Financial Aid Specialist, Employment Counselor or Personal Service Representative usually enters this information into TWIST.

   ✓ *Child care Management Information System* – Information about child care financial aid records not recorded in TWIST are found in the financial aid Standard and Guideline.

- ✓ *Financial Aid Application* – This paper application must be on file in the customer's individual file folder for all Workforce Solutions aid except child care subsidies if the amount of aid exceeds $200 in a twelve month period.

  This application is completed by the customer with assistance from a Financial Aid Specialist, Personal Service Representative or other staff member.

- ✓ *Paper Documents* – When there are documents such as vouchers or receipts tracking aid to customers this information may be kept in the customer's individual file folder or a central file as determined by management.

7. **Tracking hours of cooperation - TWIST –** In order to maintain receipt of benefits TANF recipients and some Food Stamp recipients must track the number of hours they look for work or prepare to work as agreed to in an Employment/Family Employment Plan. The number of hours is data entered into TWIST.

   - ✓ *TWIST/Service Tracking* – Hours must be tracked under the appropriate Program Type and Fund in TWIST. The customer must have a record in TWIST/Program Detail. Enter the appropriate service in TWIST/Service Tracking. Click on the "Participation" button, record the month of participation and the hours of participation. Customers recording hours under more than one service code must have hours tracked under each code.

     The Program Tracking Specialist enters hours of participation.

     See Desk Aid VII.F. Information Resources for Staff – Desk Aid for One-Time Partial Week Cooperation.

   - ✓ *Paper Documents* – Job search logs and other paper documents will be used by the customer to record hours as noted above. Each job search contact, regardless of the means of contact, will be considered as 2 hours of participation. A customer who makes 15 contacts in a week will have 30 hours of participation in job search. Job search logs and other documents tracking participation will be filed in the individual file folder.

8. **Sending Non-Cooperation Notices Warning of Loss of TANF Benefits – TWIST** - *See Information Resources for Staff VIII. D. Utilizing the Outreach Letter Process in TWIST Phase 4 Scheduler* **–** Use the recruitment letter found in the Basic Services Standard/Information Resources for Staff VIII. 4 for TANF non-cooperation. This letter will be sent to the customer by the third Monday of each month in which cooperation is not adequate. The non-cooperation letter will ask the customer to call a Personal Service Representative. After speaking to the customer the PSR may decide to update hours of participation for customers who have in fact complied with the employment plan or determine that the customer has good cause not to cooperate. The PSR will enter the good cause reason into TWIST. In these instances the customer's TANF cash assistance is not affected. If the customer does not have a good reason for not co-operating the Program Tracking Specialist will notify HHSC of the non-cooperation and the customer will likely loose benefits for a time.

In some cases the name of the PSR on the customer non-cooperation letter will be a staff member who has been guiding the customer's job search or work readiness activities. In other cases the PSR may not have spoken previously to the customer. [See this standard, VIII. C. Information Resources for Staff, Resident Services Process Maps, 1. Customer Requests Services to Allow Her TANF Certification and 2. Customer Requests Services to Continue Receipt of Food Stamps.] These process maps indicate how the PSR will help each customer who calls, in response to a non-cooperation letter, and what will be documented in TWIST.

The PSR will receive a roster, generated in TWIST, of the letters that were sent in her name. The PSR will data enter into TWIST counselor notes information from the conversation with the customer. She will also data enter good cause reasons for non-cooperation and will give the Program Tracking Specialist any documents verifying additional hours of cooperation.

The Program Tracking Specialist will notify HHSC of non-cooperation.

9. **Documenting Customer Responses to Non-cooperation Letters in TWIST-Program Detail – Program Type- Choices** – A summary of the conversation with a customer responding to a non-cooperation letter will be entered into the TWIST counselor notes by the staff member (usually a PSR) who has the conversation. (*See Process Chart in this standard titled Customer Requests Services to Allow Her TANF Certification – Steps 6A – 6D)*

✓ If the customer responds that she has gone to work:
1. The PSR will get information about where the customer is working, expected work hours and pay and enter it into TWIST/Services (39) Unsubsidized Employment.
2. The PSR will inactivate the work application in WorkInTexas.com if the customer does not want to continue looking, check WorkInTexas.com to determine if the customer's job is the result of Workforce Solutions referral to the employer, notify ESD if the job results in a direct placement.
3. Notify the Tracker to send the 2583 notifying HHSC of the employment
4. PSR will close TWIST records for services no longer being used by the customer
5. Note in counselor notes the customers desire or not for post employment services
6. Update or add TWIST employment plan to reflect post employment services other than child care

✓ If the customer has good cause not to cooperate she will be assigned to the PSR who determined the good cause. (*See desk aid I. E. Information for Staff- Workforce Solutions Good Cause Desk Aid for Personal Service Representatives*) The PSR will guide the customer's work search for as long as she wants and needs Workforce Solutions services.
1. The PSR will show good cause in all the appropriate areas of TWIST – Counselor notes- Good Cause tab- Service Activity for Good Cause
2. The Program Tracking Specialist will discontinue or resume financial aid as directed by the PSR. The Program Tracking Specialist will assure appropriate changes in child care payments are initiated.

3. The Program Tracking Specialist will check TWIST monthly to determine when the customer no longer has good cause not to cooperate or she may learn this from the PSR. The Program Tracking Specialist will then begin to look for records of cooperation from the customer.

- ✓ The PSR may determine that the customer does not have sufficient reason for non-cooperation but the customer expresses an interest in beginning to cooperate with Workforce Solutions. The PSR will begin to guide her work search and do so for as long as she wants and needs Workforce Solutions services.
  1. The PSR will enter into TWIST/ Counselor notes a summary of the conversation.
  2. The Program Tracking Specialist will complete TWIST/Penalty tab to impose the penalty for non cooperation
  3. The Program Tracking Specialist will resume child care payments for the customer if they have been stopped. She will notify the appropriate contractor and include information in TWIST/Support Services
  4. The Program Tracking Specialist will enter any hours of participation provided by the customer

- ✓ If the customer has fulfilled her required cooperation hours but for some reason they are not recorded the PSR will assure that appropriate paper documents are on hand and hours are recorded in TWIST. The customer may continue to guide her own work search with the help of an Employment Counselor if she prefers.

- ✓ If the customer does not respond to the non cooperation letter or responds that she will not be cooperating
  1. The PSR records any conversation in TWIST/Counselor Notes including the PSR's offer of continued job search assistance from Workforce Solutions.
  2. The Program Tracking Specialist records the sanction in TWIST/Penalty tab and closes Services in TWIST /Service Tracking
  3. The Program Tracking Specialist discontinues all financial aid contingent of the customer's cooperation. This may include completion of the paper form 2510 to stop child care payments.
  4. The Program Tracking Specialist inactivates the WorkInTexas.com work application
  5. In one month after the customer has indeed not co-operated the Program Tracking Specialist closes the customer record in TWIST/Program Detail/Final Completion reason.

10. **Recommending Penalties or Other HHSC Actions for Customers Receiving Food Stamps -TWIST – Program Detail – Program Type – Food Stamp E&T** - A sanction will be recommended to HHSC when a food stamp recipient does not respond to a recruitment letter by the date specified on the letter. The recommendation is sent through TWIST/Customer Record/FSE&T History/ Penalty tab. The reason "did not respond" is used to recommend the sanction. The same process is used to recommend a sanction when the customer does not cooperate according to her employment plan agreement. The reason in this case is "did not cooperate".

A notice of reconsideration is sent to HHSC when a customer responds to a recruitment letter with an apparently valid reason why she is not required to cooperate. This is done using the HHSC paper form 1817.

11. **Employment Information – WorkInTexas.com, TWIST** - It is the ultimate goal of Workforce Solutions to help our customers find a job, support them in work and find a better job if they want. Tracking a customer's employment allows us to measure our success. Employment information is recorded in the same MIS that maintains the customer record.

- ✓ *WorkInTexas.com* – **Direct placements** are recorded in WorkInTexas.com. An employer services representative will call the employer to confirm the hire and it will be recorded on the job posting.

  A d*irect placement* is defined as an employment placement activity that meets the following four conditions:

  1. A job posting describing the needs of the employer is entered into WorkInTexas.com prior to directing any candidates to the employer.
  2. Workforce Solutions staff member directs a candidate to contact the employer and records the contact in WorkInTexas.com.
  3. The employer confirms the job candidate is employed in an unsubsidized job as defined above.
  4. Employer Services Division staff verify the direct placement.

  Resident services staff should not call employers to verify a candidate has been hired. They are, however, strongly encouraged to verify employment through the job candidate. Resident service staff with information about a candidate who is hired should sent the information by email to the employer services office at 2020 N. Loop West. The email address is placementinfo@wrksolutions.com. ESD staff will then verify the placement with the employer and enter placement information in WorkInTexas.com.

  Obtained employments may be data entered to the customer record in WorkInTexas.com when the employment is not a direct placement and the staff member has good reason to believe that the employment will not be recorded in Texas UI wage records. The WorkInTexas.com definition of an obtained employment is employment of the customer after work registration in a job that is not a direct placement as defined above. This employment is automatically recorded from UI wage record data if the customer goes to work for a Texas UI covered employer. The information must be data entered into WorkInTexas.com in addition to entry into TWIST.

  Obtained Employments manually recorded by staff are usually data entered by the staff member who receives the information from the customer

  Job Developments may result in a direct placement to be entered into WorkInTexas.com. A job development occurs when a Resident Services staff member has the agreement of the Business Consultant to call an employer who is known to hire workers with the skills and/or experience held by a particular job seeker. The resident services staff member calls the employer, discusses the specific customer's qualifications, the employer agrees to interview the customer, and an appointment is made.   After the referral is made:

1. The Employment Counselor or other staff member records the job development activity in the WorkInTexas.com service panel.
2. If the customer reports that she has been hired the Resident Service staff person completes the Placement/Job Development Verification form and emails it to www.placementinfo.org for verification. This form has a section for recording placements from job development activity.
3. When the email is received, Employer Services staff at 2020 N. Loop (ES2020) office will data enter the job posting and referral in WorkInTexas.com.
4. ES 2020 verifies and data enters the hire, and completes an employer satisfaction survey.

✓ *TWIST*– **Initial employment** should be recorded in TWIST/Service Tracking/Employment Services (39) as soon as a customer who has a record in TWIST/Program Detail works for pay in an unsubsidized job. Resident Services staff verifies employment with the resident customer.

Resident services staff may enter TWIST placement information from information recorded as a direct placement in WorkInTexas.com without verifying the information again with the customer. The Employer Services Division has verified WorkInTexas.com direct placement information with the employer.

Specific job information is required in TWIST when entering "employment" for the customer. If the customer is self-employed it is desirable to note a short summary of the kind of business, service or product provided, place of business, and expected income in the counselor notes.   The TWIST Placement button requires completion of certain fields. The following fields must have accurate information: Employer, Address, City, State, Zip, Phone, County code and City code. When information is not available to accurately complete the remaining Placement fields, use the default information noted below:

- ✓ Start date: default to 1st day of whatever month the placement may have occurred
- ✓ Wage/Hr: default to minimum wage $5.15/hr.
- ✓ Hrs/Wk: default to 40
- ✓ Contact: default to "Contact"
- ✓ Worksite: default - leave blank
- ✓ # Employees: default - leave blank
- ✓ OES: default to: 99999-Other Miscellaneous Services
- ✓ SIC: default to: 9999-Other
- ✓ Training Related: default - leave blank
- ✓ U.I. Covered: default - leave blank - * see note
- ✓ Employer Benefits: default - leave blank
- ✓ Relocate: default - leave blank

note- If not UI covered go to wage detail. The following information must be included- Customer name and social security number, company name and address, start date with this employer, customer's job title, wages earned, quarters and applicable year in which wage were earned.* ***See TWC WD 11-00 for complete instructions. http://www.twc.state.tx.us/boards/wdletters/wd00letter.html*

If the work is not Texas UI covered an assigned staff member may enter the employment and wage information into the TWIST record for performance credit. The staff member will bring up the customer record and click on Performance. Employment data may be entered from information gained from the customer if the information is supported by employer-generated documents such as check stubs. Telephone verification of employment/wages with the employer is acceptable with the written permission of the customer. Paper documents used to support supplemental wage information must be maintained with the customer's paper file.

The customer record is often closed when she finds employment. A customer with a record in Program Detail – Program Type – Choices who is working with will have the employment entered as stated above. The record will not be closed until the customer is no longer receiving TANF cash assistance. Her service code will be changed to show that she is "transitional" – in the process of moving from TANF cash assistance toward self-sufficiency.

12. Exits or closing of records – WorkInTexas.com, TWIST – In both Management Information Systems records may be manually closed or will automatically close when a lack of activity indicates the customer is no longer working with Workforce Solutions. In WorkInTexas.com the automatic close is called an "inactivation" of the record and in TWIST it is called a "soft" close. TWIST records will only soft close when no services are open for the customer. It is always preferable to close the record manually when the customer no longer wants or needs Workforce Solutions services.

- ✓ *WorkInTexas.com* - Records in WorkInTexas.com automatically become inactive when a direct placement or "obtained employment" is recorded. The application is available in WorkInTexas.com for reactivation for one year from the date of last service. Applications in WorkInTexas.com will remain in active/open status for as long as a customer is receiving an unemployment check. The applications will automatically become inactive/close when the customer is not receiving unemployment, has no recorded service for 90 days, has not entered the database using her password, and the application has not been manually updated in 90 days. Direct customer access into WorkInTexas.com at least once every 60 days will allow the application to remain active in the data base.

- ✓ *TWIST* – In order to close a record in TWIST all services must be closed and then the Program Detail record must be updated with the appropriate exit code. In many cases closing a record begins the process of performance measurement for the customer under the Program Type recorded in the TWIST record. When closing a record because the customer is working Placement information must be entered before using the placement as a final completion reason.

Records in <u>Program Detail – Program Type – WIA</u> must be closed when the customer has found work and no longer wants expanded services to keep a job or get a better job, has not found work but no longer desires help form Workforce Solutions, or has lost touch with Workforce Solutions and cannot be contacted after reasonable attempts are made.

The staff person working with the customer will close each service that is open in TWIST/Service Tracking when the customer is no longer receiving that service. A new service will be opened when appropriate. All services must be closed before the Program Detail is exited. If the reason for the closure is not clear from reading other parts of TWIST it should be noted in counselor notes.

Records in <u>Program Detail – Program Type – TANF Applicant</u> will be closed when the customer becomes Choices eligible. When the Program Tracking Specialist sees a certification date in TWIST for the TANF applicant she will open a service under Program Detail - Program Type – Choices. The TANF applicant record may then be closed or allowed to soft close.

When it becomes clear that the customer will not be certified (wait two months from application) the record is closed unless the customer asks for Workforce Solutions services to help her find employment. The extent and type of services that she wants and needs will determine how she is tracked at that time. Program Tracking Specialists may periodically review the active and inactive lists in TWIST to close any record that is more than two months old with no TANF certification date. This information can be found in the LBB report on TWIST, or in TWIST/TANF History or in HHSC/SAVERR.

Records in <u>Program Detail – Program Type – Choices</u> must be closed when the customer is no longer eligible to receive TANF benefits. The Program Tracking Specialist or other staff member will be aware of the ineligibility through the HHSC Management Information System (SAVERR). The Program Detail Record must be closed effective on the last day of the month in which TANF benefits are received. Services must be closed when they are no longer being provided to the customer and all services must be closed before closing the Program Detail record.

A customer who is exempt from requirements to cooperate with Workforce Solutions but has volunteered to do so may be closed as soon as she makes it known that she no longer wishes to work with Workforce Solutions. The TWIST closure code – Volunteer Claimed Exemption -is used.

Records in <u>Program Detail – Program Type – Choices +</u> must be closed when the customer no longer wants or needs our services. The customer may have reached her goal of a better job or she may have decided she is satisfied with her present work. The Choices + record is closed if the customer looses a job and reapplies for TANF.

Records in <u>Program Detail – Program Type – Food Stamp E&T</u> must be closed when HHSC management information system (SAVERR) indicates that benefits have been denied.

When a customer finds work, information about the job is entered into TWIST/Customer Information/Services/Placement as noted in the section above "*TWIST* – **Initial Employment**". A record in Program Detail –Program Type – Food Stamp E&T is closed when the employment is expected to be for at least 30 hours a week. If the customer is an ABAWD the record is closed when the employment is expected to be 20 hours a week.

When Workforce Solutions staff member sends a HHSC form 1817 recommending reconsideration of cooperation requirements the record is closed. If HHSC does not reclassify the customer she will be returned to the outreach pool and again recruited for help in her job search.

13. Follow up

Workforce Solutions staff members will attempt to communicate periodically with customers who have received financial aid from Workforce Solutions, have gone to work, and have not requested continued help in keeping the job or finding a better job. This communication is usually referred to as "follow up". All customers who receive financial aid for scholarships or work related expenses such as uniforms, tools, etc. costing Workforce Solutions more than $200 in a year will receive such follow up.

Personal Service Representatives will call or write these customers at least once each quarter for one year following the recording of employment in TWIST. Each contact will be recorded in TWIST counselor notes. Personal Service Representatives will attempt to discuss whether the customer is still working, satisfied with her work, in need or any other services that may help her to keep her job or get a better job.

Attachments:

Employment Counselor Job Description
Personal Service Representative Job Description
Employment Counselor/Personal Service Representative Customer Observation Form
Personal Service Representative Quality Counseling Records Review
Program Tracking Specialist Job Description
Program Tracking Specialist Performance Measures
Program Tracking Specialist Review Form