

Outreach Pool Customer Load Exceptions WorkInTexas Desk Aid

Outreach Pool Customer Load Exceptions

Interface records are passed between HHSC and WIT during a nightly process. TANF and SNAP customers who have been determined eligible by HHSC for TANF or SNAP benefits are loaded into the Outreach Pool list for the Outreach process.

Occasionally records will fail to properly transfer due to a variety of exceptions. Resolving each exception has its own process, in addition to the required staff privileges. This desk aid will cover the necessary staff privileges to select within Admin, the steps needed to clear the various exceptions, and offer staff a comprehensive overview of the Customer Load Exceptions process.

Staff Privileges in Admin

For staff to clear Outreach Customer Load Exceptions, the following privileges must be activated within the admin system.

Manage Individuals - Social Security Number (SSN)

Access

Starting with the **Manage Individuals** section, users will need **View/Edit SSN** within the SSN Access category in order to modify or correct SSN mismatches.

SSN Access Privilege within Manage Individuals Category



Figure 1: Programs Tab-Program Access for Choices and SNAP E&T

Staff users will need full or state admin level access to the program they wish to work with, either SNAP E&T or Choices (**Welfare Transition Program** or **WTP** in Admin).

Welfare Transition	
WTP - Welfare Transition Program	State Admin ▾
Create a WTP Mini-Registration	Yes ▾
Eligibility Dates Lockdown Disabled	Yes ▾
WTP - Edit WTP Timesheets	Yes ▾

Figure 2: Choices (WTP) Program Access

SNAP E&T	
SNAP - SNAP Program	Full ▾
SNAP - Create SNAP Mini Registration	Yes ▾
SNAP - Bypass Lock Down	Yes ▾
Ability to Edit Application when Exited.	Yes ▾

Figure 3: SNAP E&T Program Access

Programs Tab – Modify Access for Choices and SNAP E&T Mismatch Reason 1

In addition to appropriate program access, staff users managing the exception process will also need access to a **new line-item privilege** per program they manage. The **Modify customer load exception mismatch reason 1 – Invalid County/Zip code combination** privilege must be set to **Yes**.



Figure 4: Line Item Privilege

Mismatch Reason 1

Managing the Customer Load Exception Process

To access the **Manage Customer Load Exceptions** menu, staff will need to access the **Manage Outreach Pool** menu. This is the same starting point for anyone working with Outreach Pool Records. The Exceptions menu covers both SNAP E&T and Choices.

from the Manage Outreach Pool options listed below.

Choices (TANF) Outreach Management	SNAP E & T Outreach Management	Manage Customer Load Exceptions
Manage HHSC TANF recipient referrals, set-up and schedule Initial Appointments, manage...	Manage HHSC SNAP recipient referrals, set-up and schedule Initial Appointments, manage...	Manage HHSC Choices (TANF) and SNAP E & T interface files' record data errors.

Figure 5: Manage Customer Load Exceptions

The filter options available to the user will depend on whether the staff member is local staff or state staff. For local staff, options will be limited to their local board area. For state staff, an area will always need to be selected since no area will populate by default. Users will need to select the appropriate program area.

Customer Load Exceptions

The following records have import mismatch problems preventing customers from being added to the program Outreach Pool. Please review records and flag those that are ready to be added to the Outreach Pool.

[Hide Filter Criteria](#)

* Program:

LWDB/Region:

Office:

Error Code:

Work Code:

From: [Today](#)

To: [Today](#)

Client Number:

EDG Number:

[\[Apply Filters \]](#) [\[Reset Filters \]](#)

Figure 6: Customer Load Exceptions Filter Options

The following list includes some of the unique filter options available to staff members:

- Program – SNAP Employment and Training, Choices, based on staff program privileges.

- Error Code – includes the list of all 7 exception error codes (pictured below).
- Work Code – includes the list of all standard work codes used within program management.

Note: The **From** date selection will default to the date associated with the most recent exception record creation.

None Selected
1 - Invalid County/zip code combination.
2 - Client # matched; SSN mismatch, client is active in WIOA, TAA, ES/WP or NCP, and the HHSC SSN is not assigned to another WIT individual.
3 - Client # matched; SSN mismatch, client is NOT active in WIOA, TAA, ES/WP or NCP, and the HHSC SSN is assigned to a different WIT individual.
4 - Client # matched; SSN missing; DOB, FName, LName mismatch.
5 - Client # matched; SSN updated.
6 - SSN matched; Different Client # assigned to customer.
7 - SSN matched; Client # missing; DOB, FName, LName mismatch.

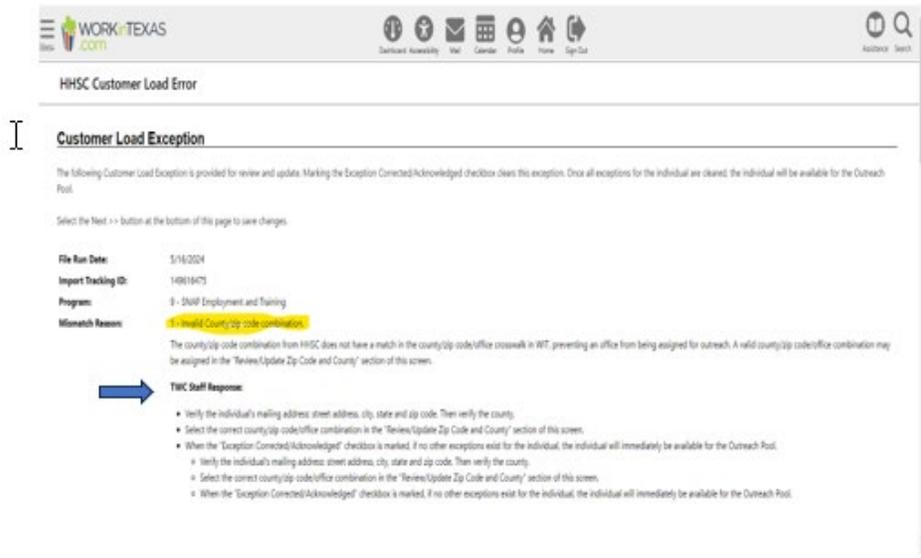
Figure 7: Outreach Exception Error Code List

Once the filters are applied, the exception list will show. From this table, staff can review error types, review a variety of customer data, and access the edit functionality.

Tracking ID	Program	Client Number	Name	EDG Number	Mismatch Reason	Work Code	Type Program	SIG	Zip Code	County	File Date	Action
[REDACTED]	SNAP Employment and Training	[REDACTED]	[REDACTED]	[REDACTED]	2 - Client # matched; SSN mismatch, client is active in WIOA, TAA, ES/WP or NCP, and the HHSC SSN is not assigned to another WIT individual.	G - Caring for a child under age 6 years old	Not Applicable	A	[REDACTED]	[REDACTED]	[REDACTED]	Edit

Figure 8: Outreach Exception Results Table

After you click the **Edit link**, the Screen Text is available to assist you in identifying the steps to resolve the different Exception Error Codes.



**Figure 9: Resolving Outreach Exception Error Codes
Exception Error Code 1**

Exception Error Code 1 is **Invalid County/Zip Code Combination**. The county/zip code combination from HHSC does not have a match in the county/zip code/office crosswalk in WIT, preventing an office from being assigned for outreach. A valid county/zip code/office combination may be assigned in the **Review/Update Zip Code and County** section of this screen.

From the Customer Load Exceptions List Window:

1. Select the **Edit** hyperlink in the Action column for the exception you wish to clear or review.
2. Verify the individual's mailing address: street address, city, state, and zip code. Then verify the county.
3. Select the correct county/zip code/office combination in the Review/Update Zip Code and County section.

Review / Update Zip Code and County	
Type in a zip code or a County name or an Office name and the system will compose a list of valid zip code + county + office combinations from which to choose. Make selections from the system composed list of combinations to resolve this mismatch reason. If a zip code is missing from the list, reach out to your WIT table County X Zip Code X Office table.	
New Zip Code 5:	<input type="text"/>
New County Code:	<input type="text"/>
New HHS County Code:	<input type="text"/>
Office:	<input type="text"/>
LWDB:	

Figure 10: Review / Update Zip Code and County

4. Select the **Exception Corrected/Acknowledged** checkbox once you are finished working with the record.

Exception Corrected/Acknowledged:

Figure 11: Exception Corrected/Acknowledged Checkbox

5. When the **Exception Corrected/Acknowledged** checkbox is marked, if no other exceptions exist of the individual, the individual may be available for the Outreach Pool after overnight data processing.
6. Select the **Next** button.

Note: Staff must select the **Exception Corrected/Acknowledged** checkbox to be able to select Next. Upon reaching the final record for a particular exception code, the button will display as **Finish** instead of Next.

Exception Error Code 2

Exception Error Code 2 is **Client number is matched; SSN mismatch, client is active in WIOA, TAA, ES/WP or NCP Choices, and the HHSC SSN is not assigned to another WIT individual**. The client number from HHSC matches a client number in WIT. The SSN from HHSC does not match the SSN in WIT assigned to this individual. The SSN from HHSC does not match any other individual in WIT.

- The individual in WIT with this client number is active in WIOA, TAA, ES/WP or NCP Choices.

OR

- The individual in WIT with this client number is **NOT** active in WIOA, TAA, ES/WP or NCP Choices, **BUT** has a valid (not Pseudo) SSN in WIT.

From the Customer Load Exceptions List Window:

1. Select the **Edit** hyperlink in the Action column for the exception you wish to clear or review.
2. Determine which system, WIT or TIERS, has the correct SSN.
 - a. View the HHSC SSN to determine if the existing SSN is valid by selecting the **View/Edit HHSC SSN** hyperlink.
 - i. If the HHSC SSN is correct, simply cancel the Edit SSN window by selecting the **Cancel** button.



- ii. If the HHSC SSN in TIERS was incorrect, **contact HHSC to request that the SSN be updated.**

Review / Update HHSC or Individual Profile Information

Updates made in this section to HHSC information (within WorkinTexas.com) may not result in the individual being available for the Outreach Pool if the updates are not also made by HHSC. The individual may reappear on the Customer Load Exceptions List.

HHSC SSN: [View / Edit HHSC SSN](#)
 Individual Profile SSN: [View / Edit SSN](#)
 HHSC Date of Birth:
 Individual Profile Date of Birth:
 HHSC First Name:
 Individual Profile First Name:
 HHSC Middle Initial:
 Individual Profile Middle Initial:
 HHSC Last Name:
 Individual Profile Last Name:

Figure 12: VOS Review/Update or Individual Profile Information

- i. View the Individual Profile SSN by selecting the **View/Edit SSN** hyperlink.
 - i. If the Individual’s Profile SSN is correct, simply cancel the Edit SSN window by selecting the **Cancel** button.



- ii. If the Individual’s Profile SSN is incorrect, enter the appropriate SSN in the **New SSN** fields and select the **Save** button.

Individual Information

User Name: [REDACTED]

Name: [REDACTED]

Current SSN: [REDACTED]

* New SSN:

Please enter a valid Social Security Number

Assign Pseudo SSN

Figure 13: Individual Profile SSN Entry Fields

3. Select the **Exception Corrected/Acknowledged** checkbox once you are finished working with the record.

Exception Corrected/Acknowledged:

Figure 14: Exception Corrected/Acknowledged Checkbox

4. When the Exception Corrected/Acknowledged checkbox is marked, if no other exceptions exist for the individual, the individual may be available for the Outreach Pool after overnight data processing.
5. Select the Next button.

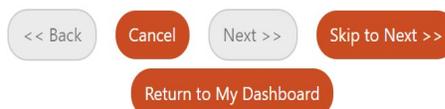
Note: Staff must select the **Exception Corrected/Acknowledged** checkbox to be able to select Next. Upon reaching the final record for a particular exception code, the button will display as **Finish** instead of Next.

Exception Error Code 3

Exception Error Code 3 is **Client number is matched; SSN mismatch, the client is NOT active in WIOA, TAA, ES/WP, or NCP Choices, and the HHSC SSN is assigned to a different WIT individual.** The client number from HHSC matches a client number in WIT. The SSN from HHSC does not match the SSN in WIT assigned to this individual. The SSN from HHSC is assigned to a different individual in WIT. This mismatch reason may be resolved in the **Review/Update HHSC or Individual Profile Information** section of this screen.

From the Customer Load Exceptions List Window:

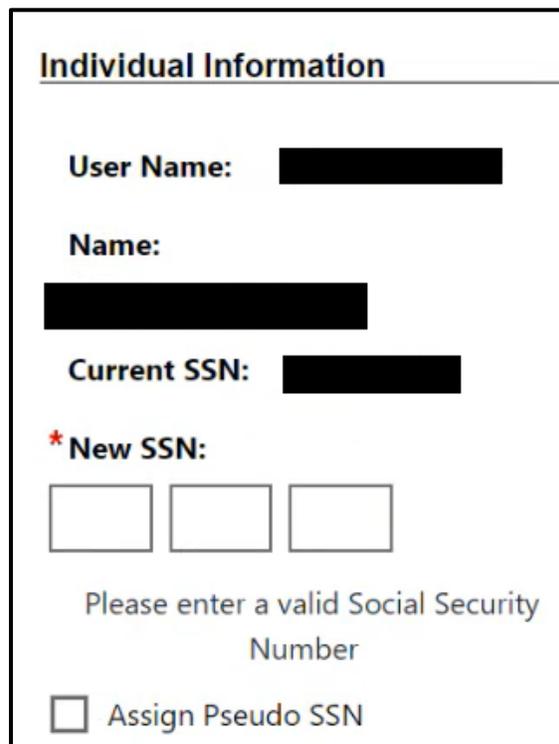
1. Select the **Edit** hyperlink in the Action column for the exception you wish to clear or review.
2. Determine which system, WIT or TIERS, has the correct SSN.
 - a. View the HHSC SSN to determine if the existing SSN is valid by selecting the **View/Edit HHSC SSN** hyperlink.
 - i. If the HHSC SSN is correct, copy the existing SSN for use in the next step.
 - ii. If the SSN in TIERS is incorrect, **contact HHSC to request that the SSN be updated.**
 - b. View the Individual Profile SSN by selecting the **View/Edit SSN** hyperlink.
 - c. If the Individual Profile SSN is correct, simply cancel the Edit SSN window by selecting the **Cancel** button.



- i. If the Individual Profile SSN is incorrect, find the individual in WIT with the SSN from HHSC. Determine

the correct SSN for this individual. Follow the guidance in the Employment Services Guide for updating an individual registration in WIT.

ii. If a Pseudo-SSN has been assigned and needs to be updated, remove the checkmark from the **Assign Pseudo SSN** field. This will allow data entry for the SSN.



The screenshot shows a form titled "Individual Information". It contains the following fields and labels:

- User Name: [Redacted]
- Name: [Redacted]
- Current SSN: [Redacted]
- * New SSN: [Three empty input boxes]
- Please enter a valid Social Security Number
- Assign Pseudo SSN

Figure 15: Individual Profile SSN Entry Fields

3. Select the Exception Corrected/Acknowledged checkbox once you are finished with the record.

Exception Corrected/Acknowledged:

Figure 16: Exception Corrected/Acknowledged Checkbox

4. When the **Exception Corrected/Acknowledged** checkbox is marked, if no other exceptions exist for the individual, the individual may be available for the Outreach Pool after overnight data processing.
5. Select the **Next** button.

Note: Staff must select the **Exception Corrected/Acknowledged** checkbox to be able to select Next. Upon reaching the final record for a particular exception code, the button will display as **Finish** instead of Next.

Exception Error Code 4

Exception Error Code 4 is **Client number is matched; SSN missing; Date of Birth, First Name, Last Name mismatch**. The client number from HHSC matches a client number in WIT. The SSN from HHSC does not match the SSN in WIT assigned to this individual because a Pseudo-SSN is assigned to this individual in WIT. The Date of Birth or First Name or Last Name from HHSC does not match this individual in WIT. The SSN from HHSC does not match any other individual in WIT.

Within the Customer Load Exceptions Screen:

1. Select the **Edit** hyperlink in the Action column for the exception you wish to clear or review.
2. Determine if the individual in WIT is the same individual in TIERS.
 - a. If they are the same individual, follow the guidance in the Employment Services Guide for updating an individual registration in WIT. The Individual Profile SSN may be updated in the **Review/Update HHSC** or **Individual Profile Information** section of the screen. If a Pseudo SSN has been assigned and needs to be updated, remove the checkmark from the **Assign Pseudo SSN field**. This will allow data entry for the SSN.
 - i. Determine which system, WIT or TIERS, has the correct Date of Birth, First Name, and Last Name.
 - ii. If the Date of Birth or First Name or Last Name is incorrect, follow the guidance in the Employment Services Guide for updating an individual registration in WIT. The necessary information may be updated in the **Review/Update HHSC** or **Individual Profile information** section of the screen.

- iii. If the Date of Birth or the First Name or Last Name is incorrect in TIERS, **contact HHSC to request that the information be updated.**
- b. If they are not the same individual, determine if the client number should be removed from the individual in WIT.

Review / Update HHSC or Individual Profile Information

Updates made in this section to HHSC information (within WorkinTexas.com) may not result in the individual being available for the Outreach Pool if the updates are not also made by HHSC. The individual may reappear on the Customer Load Excepti

HHSC SSN:	View / Edit HHSC SSN
Individual Profile SSN:	View / Edit SSN
HHSC Date of Birth:	<input type="text"/>
Individual Profile Date of Birth:	<input type="text"/>
HHSC First Name:	<input type="text"/>
Individual Profile First Name:	<input type="text"/>
HHSC Middle Initial:	<input type="text" value="p"/>
Individual Profile Middle Initial:	<input type="text" value="p"/>
HHSC Last Name:	<input type="text"/>
Individual Profile Last Name:	<input type="text"/>

Figure 17: Date of Birth, First Name, and Last Name Data Entry Fields

3. Select the Exception Corrected/Acknowledged checkbox once you are finished with the record.

Exception Corrected/Acknowledged:

Figure 18: Exception Corrected/Acknowledged Checkbox

4. When the Exception Corrected/Acknowledged checkbox is marked, if no other exceptions exist for the individual, the individual may be available for the Outreach Pool after overnight data processing.
5. Select the **Next** button.

Note: Staff must select the **Exception Corrected/Acknowledged** checkbox to be able to select Next. Upon reaching the final record for a particular exception code, the button will display as **Finish** instead of Next.

Exception Error Code 5

Exception Error Code 5 is **Client number is matched, SSN updated Notification to staff**. The client number from HHSC matches a client number in WIT. The SSN from HHSC does not match the SSN in WIT assigned to this individual because a Pseudo-SSN is assigned to this individual in WIT. The SSN from HHSC does not match any other individual in WIT. The Date of Birth, and First Name, and Last Name from HHSC match this individual in WIT. The system updated the SSN in the Individual Profile in WIT.

When the **Exception Corrected/Acknowledged** checkbox is marked, if no other exceptions exist for the individual, the individual may be available for the Outreach Pool after overnight data processing.

Within the Customer Load Exceptions Screen:

1. Select the **Edit** hyperlink in the Action column for the exception you wish to clear or review.
2. Review data within the record.
3. Select the **Exception Corrected/Acknowledged** checkbox once you are finished working with the record.

Exception Corrected/Acknowledged:

Figure 19: Exception Corrected/Acknowledged Checkbox

4. If you wish to review additional Error Code 5 records, Select the Next button to save an acknowledgment.

Note: Staff must select the **Exception Corrected/Acknowledged** checkbox to be able to select Next. Upon reaching the final record for a particular exception code, the button will display as **Finish** instead of Next.

Exception Error Code 6

Exception Error Code 6 is **SSN matched; Different Client number assigned to SSN Matched customer**. The HHSC client number is not assigned to a WIT individual, but the HHSC SSN is matched to a WIT SSN, and the WIT individual assigned to the HHSC SSN has a different HHSC client number.

On the Customer Load Exceptions List Window:

1. Select the Edit hyperlink in the Action column for the exception you wish to clear or review.
2. Determine if the individuals with the same SSN in WIT and TIERS are the same individual.
3. Determine if the client number should be removed from the individual in WIT or contact HHSC to correct the necessary client information for resubmission.
4. Once the necessary research is completed and you wish to close out the record, select the Exception Corrected/Acknowledged checkbox.

Exception Corrected/Acknowledged:

Figure 20: Exception Corrected/Acknowledged Checkbox

5. When the **Exception Corrected/Acknowledged** checkbox is marked, if no other exceptions exist for the individual, the individual may be available for the Outreach Pool after overnight data processing.
6. Select the Next button.

Note: Staff must select the **Exception Corrected/Acknowledged** checkbox to be able to select Next. Upon reaching the final record for a particular exception code, the button will display as **Finish** instead of Next.

Exception Error Code 7

Exception Error Code 7 is **SSN matched; Client number is missing; DOB, First Name, Last Name mismatch**. The client number from HHSC does not match a client number in WIT. The SSN from HHSC matches an SSN in WIT. This individual in WIT has a different client number. The Date of Birth or First Name or Last Name from HHSC does not match this individual in WIT.

- The WIT record has a Date of Birth, but the WIT Date of Birth, First Name, or Last Name does not match the HHSC record.
- Or WIT record has no DOB, and the First name or Last name does not match the HHSC record.

On the Customer Load Exceptions List Window:

1. Select the Edit hyperlink in the Action column for the exception you wish to clear or review.
2. Determine if the individuals in WIT and TIERS are the same individual.
3. Determine which system, WIT or TIERS has the correct Date of Birth, First Name, and Last Name.
4. Determine if the client number should be removed from the individual in WIT.
5. View the **Review/Update HHSC or Individual Profile Information** section to update any Date of Birth, First Name, or Last Name mismatches.
6. If changes to the HHSC Information are required, contact HHSC to request an update.

Review / Update HHSC or Individual Profile Information

Updates made in this section to HHSC Information (within WorkinTexas.com) may not result in the individual being available for the Outreach Pool if the updates are not also made by HHSC. The individual may reappear on the Customer Load Excepti

HHSC SSN:	View / Edit HHSC SSN
Individual Profile SSN:	View / Edit SSN
HHSC Date of Birth:	<input type="text"/>
Individual Profile Date of Birth:	<input type="text"/>
HHSC First Name:	<input type="text"/>
Individual Profile First Name:	<input type="text"/>
HHSC Middle Initial:	<input type="text" value="p"/>
Individual Profile Middle Initial:	<input type="text" value="p"/>
HHSC Last Name:	<input type="text"/>
Individual Profile Last Name:	<input type="text"/>

Figure 21: Date of Birth, First Name, and Last Name Data Entry Fields

7. Select the Exception Corrected/Acknowledged checkbox once all edits and updates are complete.

Exception Corrected/Acknowledged:

Figure 22: Exception Corrected/Acknowledged Checkbox

8. When the **Exception Corrected/Acknowledged** checkbox is marked, if no other exceptions exist for the individual, the individual may be available for the Outreach Pool after overnight data processing.
9. Select the Next button.

Note: Staff must select the **Exception Corrected/Acknowledged** checkbox to be able to select Next. Upon reaching the final record for a particular exception code, the button will display as **Finish** instead of Next.