

WorkinTexas.com

Choices and SNAP E&T Programs

Outreach Pool Desk Aid

1. Select the menu button to access the Left Navigation Menu.

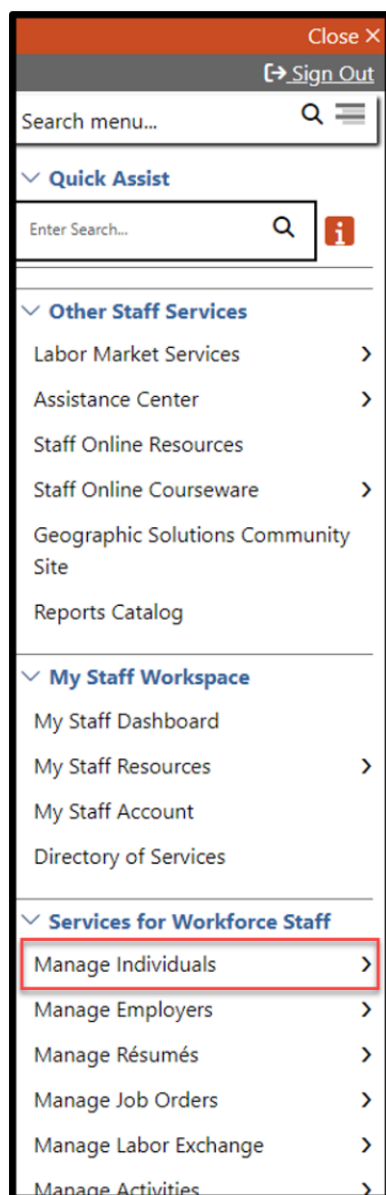


Figure 1: Screenshot showing Manage Individuals

2. Under Services for Workforce Staff, select **Manage Individuals**.

Select **Manage Outreach Pool**.

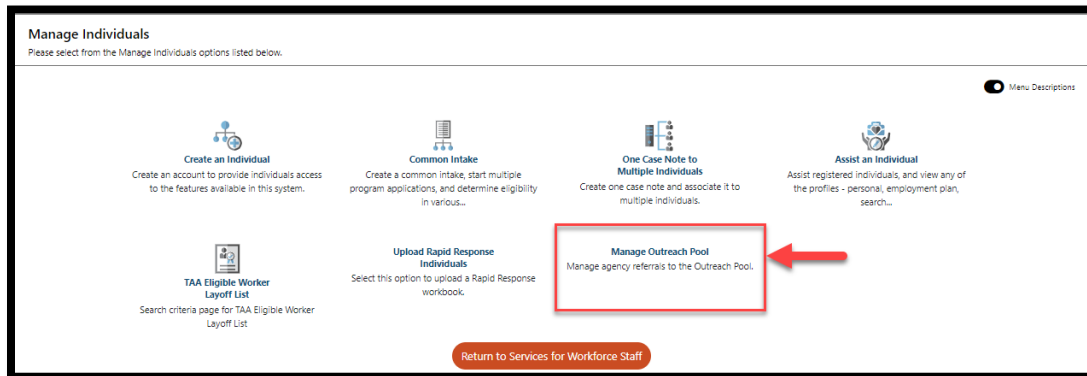


Figure 2: Screenshot of Manage Outreach Pool

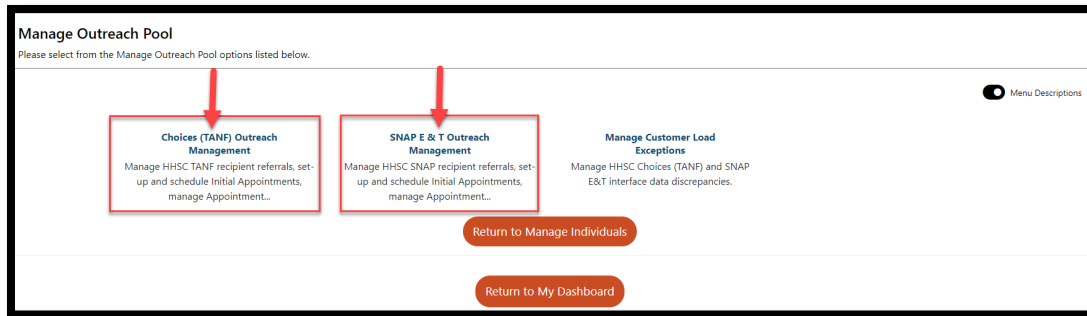


Figure 3: Screenshot of SNAP and Choices Outreach Pool Menus

Note: SNAP E&T and Choices Outreach Pools are both managed within the **Manage Outreach Pool Menu**.

Outreach Management – Choices

1. Select **Choices (TANF) Outreach Management**.

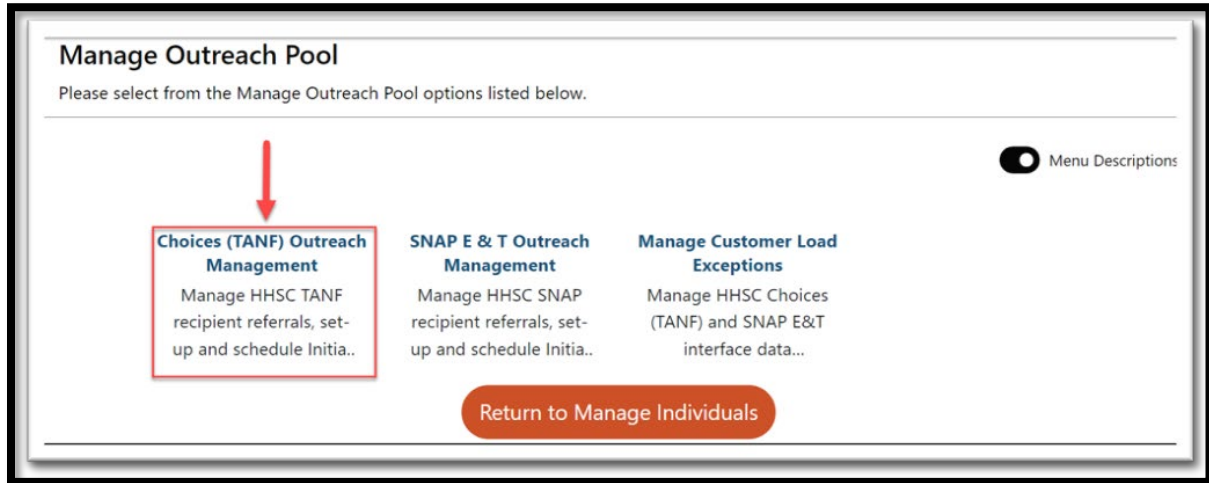


Figure 4: Screenshot of Choices (TANF) Outreach Management Link

2. Select **Choices (TANF) Appointment Schedules**.

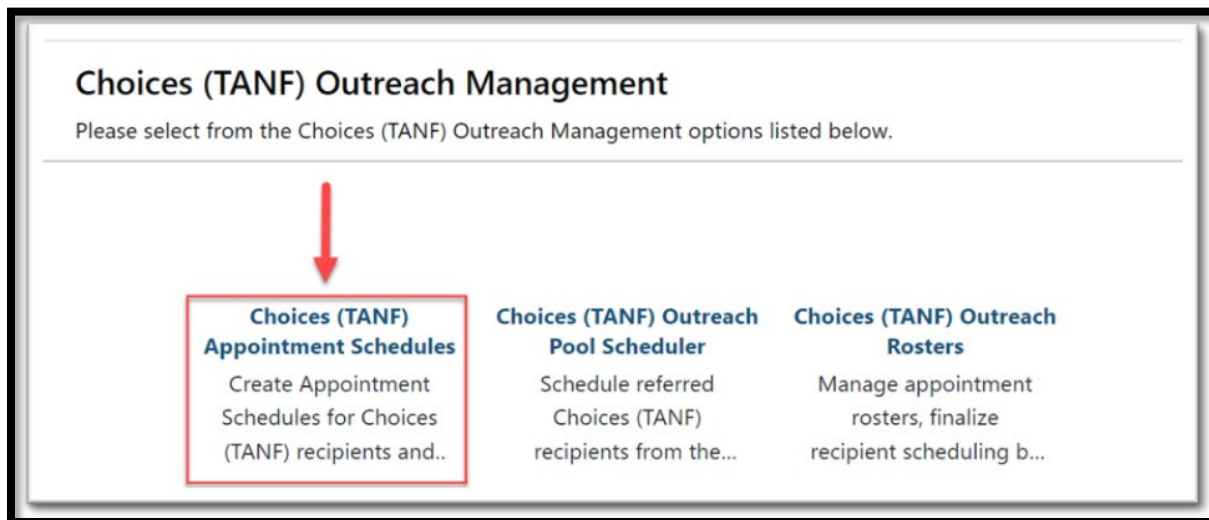


Figure 5: Screenshot of Choices (TANF) Appointment Schedules Link

3. The **Choices (TANF) Appointment Schedules** page will populate. To avoid creating multiple Schedules for the same event, select **Filter Criteria**.

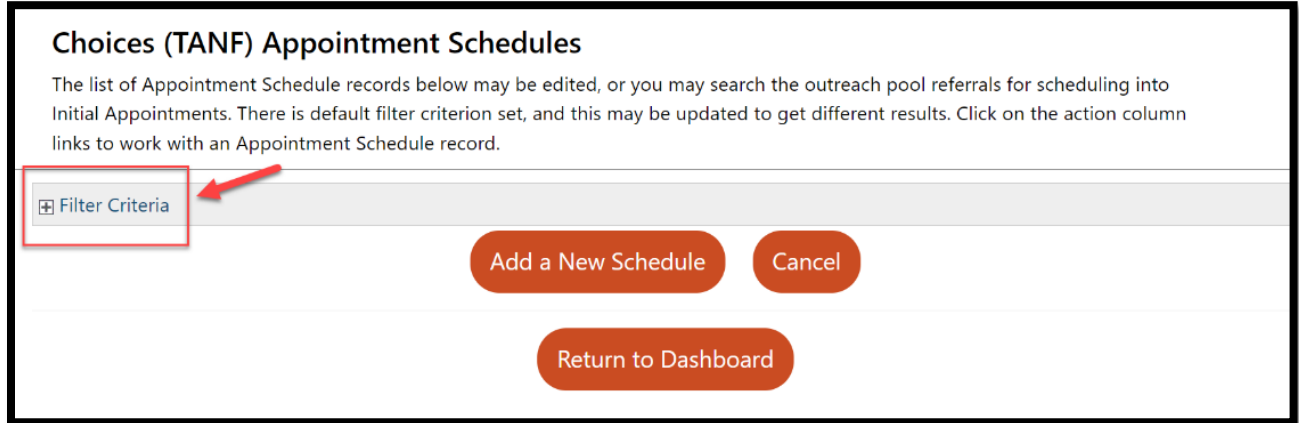
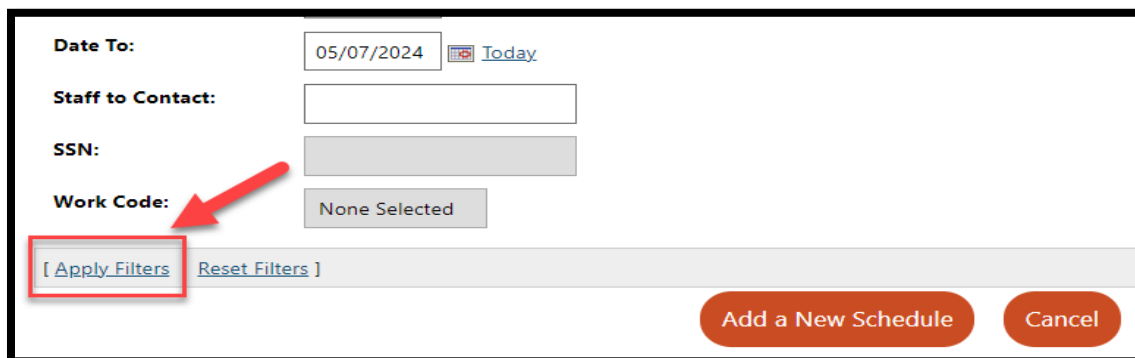


Figure 6: Screenshot of Choices (TANF) Schedules Page with an Arrow Pointing to Filter Criteria

4. Modify the fields as appropriate.

Figure 7: Screenshot of Fields to be Modified

5. Select **Apply Filters**.



Date To: 05/07/2024 [Today](#)

Staff to Contact:

SSN:

Work Code: None Selected

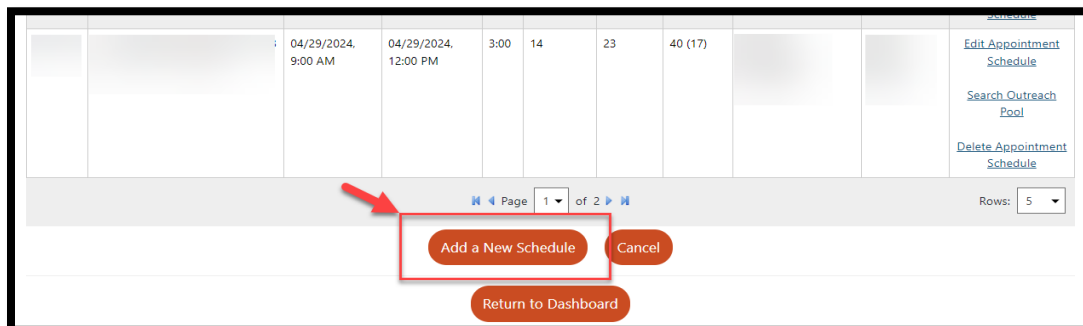
[[Apply Filters](#) [Reset Filters](#)]

[Add a New Schedule](#) [Cancel](#)

Figure 8: Screenshot with Arrow Pointing to Apply Filters Link

NOTE: A list of Appointment Schedule records will display. If an Appointment Schedule exists with the required dates, skip to step 8. If an Appointment Schedule does not exist proceed to step 6 below to Add a New Schedule.

6. Scroll down and select **Add a New Schedule**.



		04/29/2024, 9:00 AM	04/29/2024, 12:00 PM	3:00	14	23	40 (17)		

Page 1 of 2 Rows: 5

[Add a New Schedule](#) [Cancel](#)

[Return to Dashboard](#)

Figure 9: Screenshot Showing Add New Schedule Link

7. Complete all the required fields to add a new **Appointment Schedule** record and Select **Save**.

Add Schedule
Please fill in the information below to complete the Appointment Schedule record for the Choices program.

Choices Program

* LWDB/Region:

* Office Location:

Program: Choices Program

Appointment Type: 1 - Outreach for Initial Appointment

* Appointment Subject:

Capacity:

* Appointment Date: ☒ Today

* Appointment Start Time: (hh:mm am/pm)

* Appointment End Time: (hh:mm am/pm)

* Hours: Format (0:00)

* Staff to Contact:

Contact Staff Phone: - - Ext:

* Location Name:

* Location Address:

Location Address 2:

* Location Zip Code:

* Location City:

Created by:

Create Date: 12:00:00 AM

Edited by:

Edit Date: 12:00:00 AM

Figure 10: Screenshot of Appointment Schedule Record

8. From the Appointment Schedule Screen, select **Search Outreach Pool**

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

Search:


Available Appointment Schedules for Choices Outreach – Initial Appointment										
ID	LWDB, Office Location	Start Date, Time	End Date, Time	Hours	# of Pool Records	Scheduled	Capacity (Avail)	Location	Staff to Contact	Action
		04/29/2024, 9:00 AM	04/29/2024, 12:00 PM	3:00	3	3	20 (17)	Workforce Solutions		Edit Appointment Schedule Search Outreach Pool Delete Appointment Schedule

Figure 11: Screenshot Showing the Select Outreach Pool

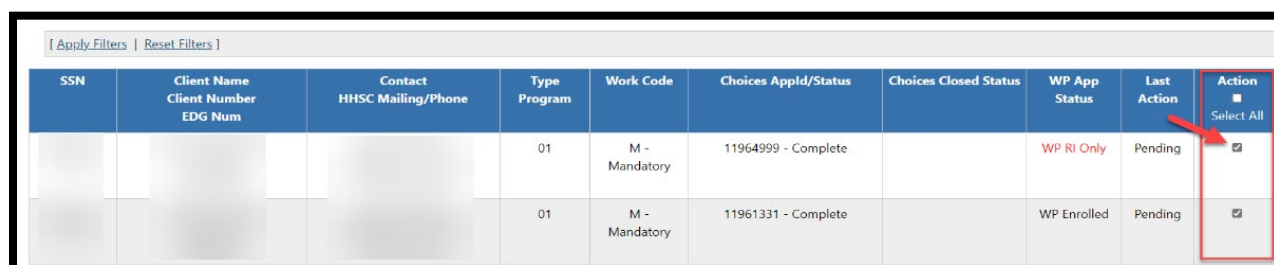
9. From the **Outreach Pool Scheduler** page, select **Show Filter Criteria**.

Figure 12: Screenshot of Show Filter Criteria Link

10. Modify the desired filters and select **Apply Filters**.

Figure 13: Screenshot of Apply Filters Link

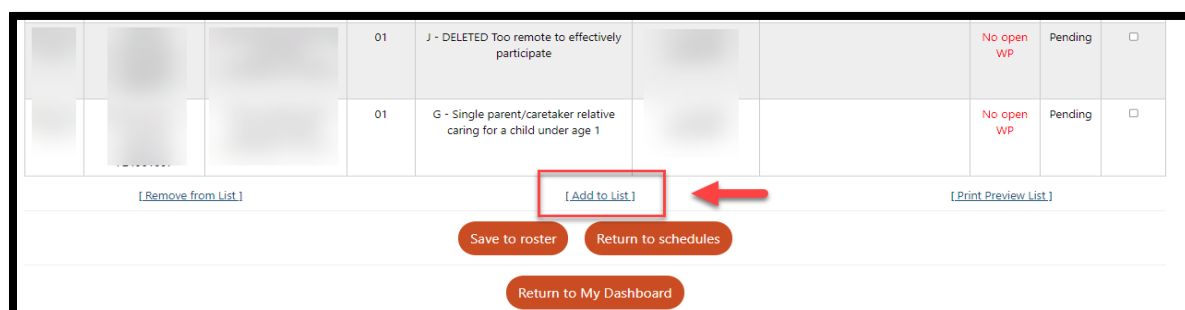
11. Select all appropriate records to include in the **Scheduled Appointment** by using the check box under the **Action** column.



SSN	Client Name Client Number EDG Num	Contact HHSC Mailing/Phone	Type Program	Work Code	Choices Appld/Status	Choices Closed Status	WP App Status	Last Action	Action Select All
			01	M - Mandatory	11964999 - Complete		WP RI Only	Pending	<input checked="" type="checkbox"/>
			01	M - Mandatory	11961331 - Complete		WP Enrolled	Pending	<input checked="" type="checkbox"/>

Figure 14: Screenshot of Action Checkbox

12. Scroll down and select **Add to List** to add records to a temporary table for roster assignment.



		01	J - DELETED Too remote to effectively participate			No open WP	Pending	<input type="checkbox"/>
		01	G - Single parent/caretaker relative caring for a child under age 1			No open WP	Pending	<input type="checkbox"/>

[\[Remove from List \]](#)
[\[Add to List \]](#)
[\[Print Preview List \]](#)

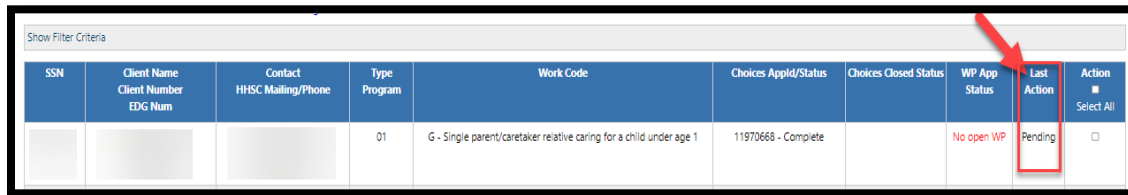
[Save to roster](#)
[Return to schedules](#)

[Return to My Dashboard](#)

Figure 15: Screenshot of Add to List Hyperlink

Note: The Last Action column provides staff members with information about the current state of the individual.

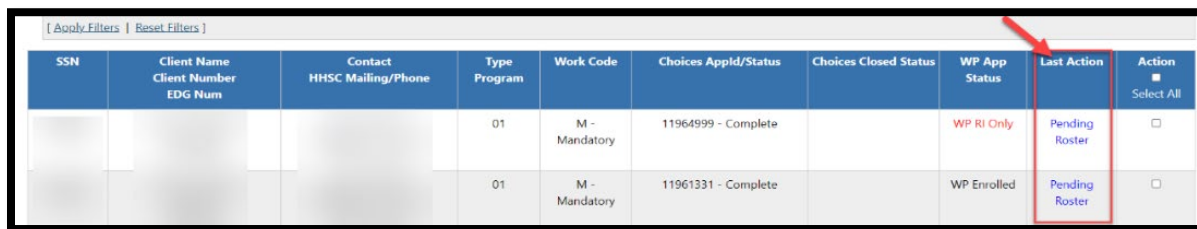
- a. **Pending** means the record has been loaded into the temporary table, but no actions have been taken.



SSN	Client Name Client Number EDG Num	Contact HHSC Mailing/Phone	Type Program	Work Code	Choices Appld/Status	Choices Closed Status	WP App Status	Last Action	Action Select All
			01	G - Single parent/caretaker relative caring for a child under age 1	11970668 - Complete		No open WP	Pending	<input type="checkbox"/>

Figure 16: Screenshot of Pending Note in Last Action Column

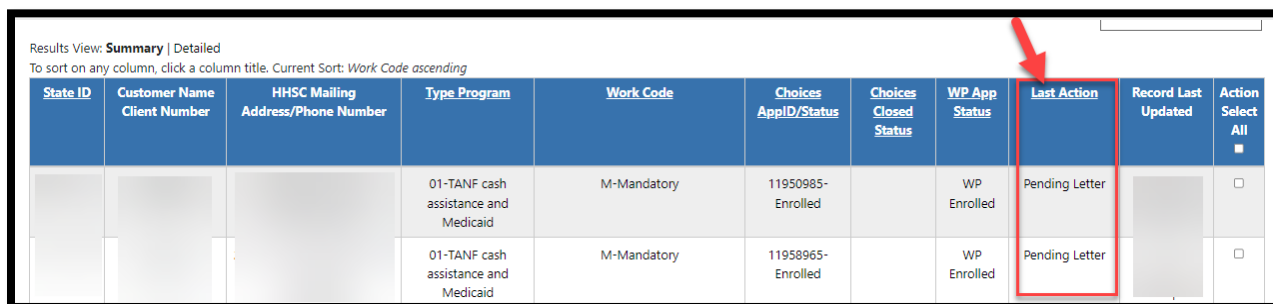
- b. **Pending Roster** means that the record is waiting to be added to the roster.



SSN	Client Name Client Number EDG Num	Contact HHSC Mailing/Phone	Type Program	Work Code	Choices Appld/Status	Choices Closed Status	WP App Status	Last Action	Action Select All
			01	M - Mandatory	11964999 - Complete		WP RI Only	Pending Roster	<input type="checkbox"/>
			01	M - Mandatory	11961331 - Complete		WP Enrolled	Pending Roster	<input type="checkbox"/>

Figure 17: Screenshot of Pending Roster Note in Last Action Column

- c. **Pending Letter** means that the record has been added to the roster and is waiting for the letter to be printed.

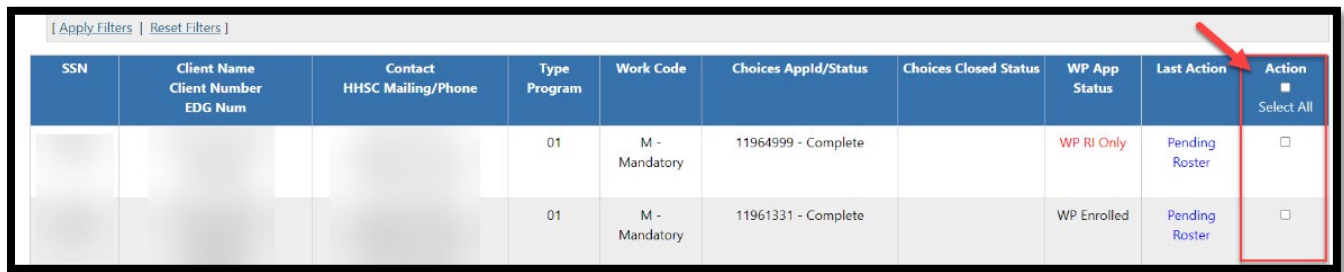


Results View: **Summary** | Detailed
To sort on any column, click a column title. Current Sort: Work Code ascending

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices Appld/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
			01-TANF cash assistance and Medicaid	M-Mandatory	11950985-Enrolled		WP Enrolled	Pending Letter		<input type="checkbox"/>
			01-TANF cash assistance and Medicaid	M-Mandatory	11958965-Enrolled		WP Enrolled	Pending Letter		<input type="checkbox"/>

Figure 18: Screenshot of Pending Letter in Last Action Column

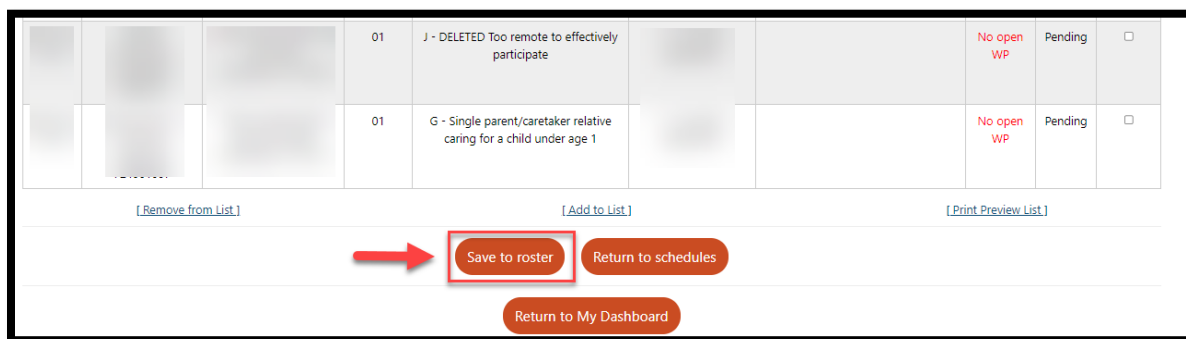
13. To add records to a roster, check the **action box** in **Action** column.



SSN	Client Name Client Number EDG Num	Contact HHSC Mailing/Phone	Type Program	Work Code	Choices Appld/Status	Choices Closed Status	WP App Status	Last Action	Action Select All
			01	M - Mandatory	11964999 - Complete		WP RI Only	Pending Roster	<input type="checkbox"/>
			01	M - Mandatory	11961331 - Complete		WP Enrolled	Pending Roster	<input type="checkbox"/>

Figure 19: Screenshot of Action Box Under Action

14. Scroll page down and select **Save to Roster**.



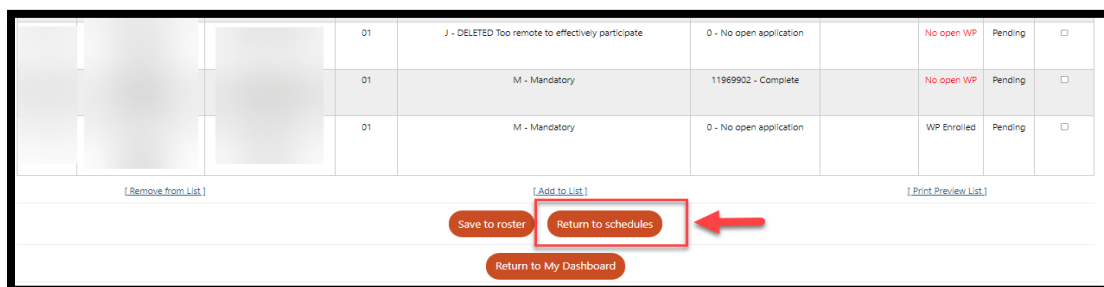
			01	J - DELETED Too remote to effectively participate		No open WP	Pending	<input type="checkbox"/>
			01	G - Single parent/caretaker relative caring for a child under age 1		No open WP	Pending	<input type="checkbox"/>

[\[Remove from List \]](#)
[\[Add to List \]](#)
[\[Print Preview List \]](#)

[Save to roster](#)
[Return to schedules](#)
[Return to My Dashboard](#)

Figure 20: Screenshot of Save to Roster Button (Link)

15. To return all unselected recipients back to the pool and return to the **Appointment Schedules Screen**, click the **Return to Schedules**.



			01	J - DELETED Too remote to effectively participate	0 - No open application	No open WP	Pending	<input type="checkbox"/>
			01	M - Mandatory	11969902 - Complete	No open WP	Pending	<input type="checkbox"/>
			01	M - Mandatory	0 - No open application	WP Enrolled	Pending	<input type="checkbox"/>

[\[Remove from List \]](#)
[\[Add to List \]](#)
[\[Print Preview List \]](#)

[Save to roster](#)
[Return to schedules](#)
[Return to My Dashboard](#)

Figure 21: Screenshot of the Return to Schedules Button (Link)

Note: An individual's attendance record cannot be finalized until a **Print Letter Date** exists within Roster Management.

16. To print Outreach letters, return to the **Choices (TANF) Outreach Management** Page and select the **Choices (TANF) Outreach Rosters**.

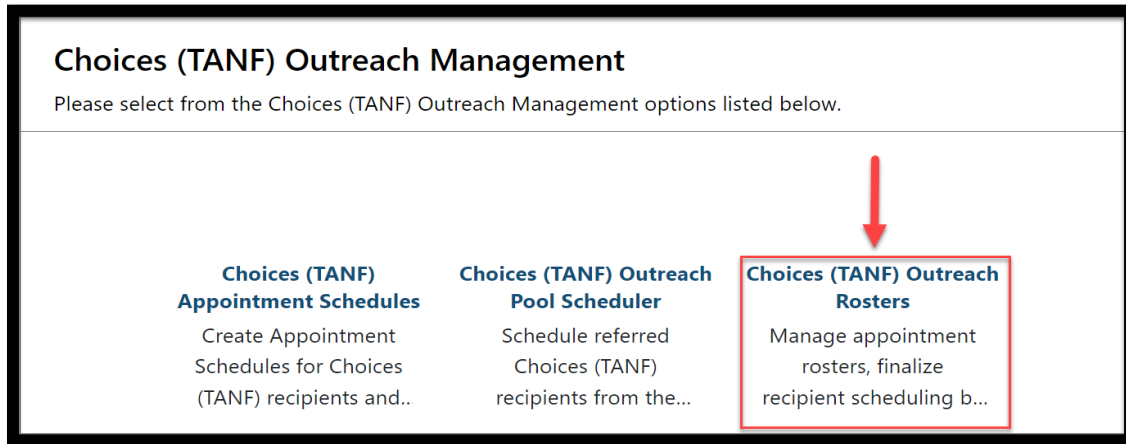


Figure 22: Screenshot of Choices (TANF) Outreach Rosters Link

17. Select **Filter Criteria**.

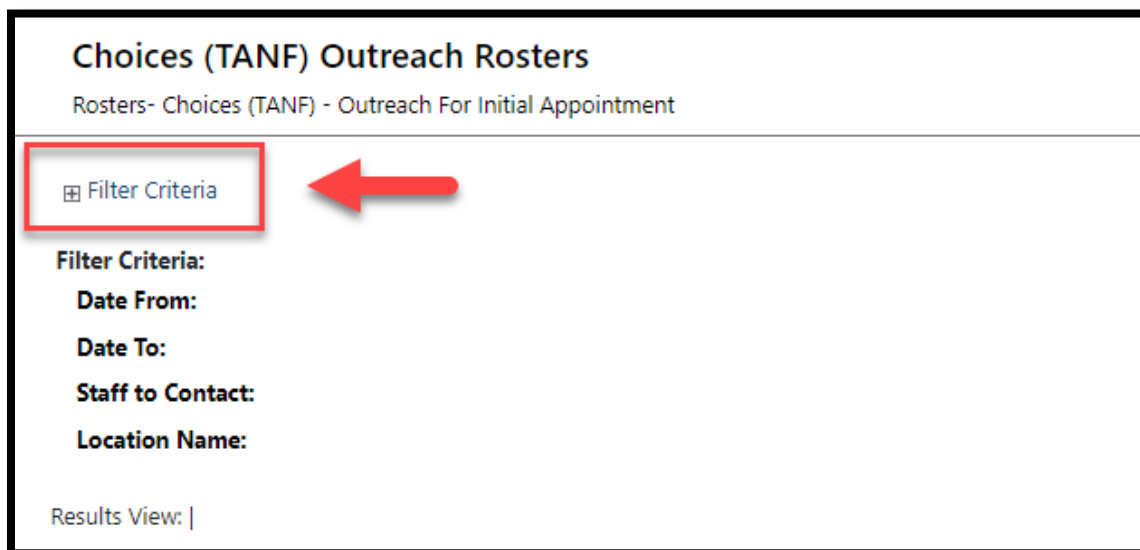


Figure 23: Screenshot of Filter Criteria Link

18. Under **Filter Criteria**, modify the desired filters and select the **Apply Filters**.

Filter Criteria

*LWDB/Region:

Office Location:

Programs: Choices (TANF)

Appointment Type: Choices Outreach for Initial Appointment

SSN: - -

Client Number:

EDG Number:

Date From: [Today](#)

Date To: [Today](#)

Application Closed Status: ☒ All ☐ No Case Closure ☐ Case Closed Only

Staff to Contact:

Location Name:

[Apply Filter](#) [Reset Filter](#)

Figure 24: Screenshot of Filter Criteria with the Apply Filter Link

19. Identify which appointment that needs updating and select the **Manage Roster**.

Roster ID	Start Date & Time	End Date & Time	Hours	LWDB, Office Location	#Sched	Capacity(Avail)	Location	Staff Contact	Action
3021116	4/2/2024 9:00:00 AM	4/2/2024 10:00:00 AM	1:00		1	No Limit ()			Manage Roster Print Roster
3021117	1/2/2024 8:00:00 AM	1/2/2024 12:00:00 AM	4:00		8	No Limit ()			Manage Roster Print Roster
3024456	3/1/2024 1:00:00 PM	3/1/2024 3:00:00 PM	2:00		2	No Limit ()			Manage Roster Print Roster
3024457	3/15/2024 1:00:00 PM	3/15/2024 3:00:00 PM	2:00		0	No Limit ()			Manage Roster Print Roster

Figure 25: Screenshot of Manage Roster Link under the Action Column

20. Using the check boxes under the **Action** column, check records in **Pending Letter Status** to print letters.

Results View: **Summary** | Detailed
To sort on any column, click a column title. Current Sort: *Work Code ascending*

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All ■
			01-TANF cash assistance and Medicaid	M-Mandatory	11950985-Enrolled		WP Enrolled	Pending Letter		<input type="checkbox"/>
			01-TANF cash assistance and Medicaid	M-Mandatory	11958965-Enrolled		WP Enrolled	Pending Letter		<input type="checkbox"/>

Figure 26: Screenshot of Action Column to Select Letters to Print

21. Scroll down and select **Print Letters**.

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All ■
			01-TANF cash assistance and Medicaid	E-Unable to work due to mental/physical disability > 180 days	11961931-Enrolled	Close Date: Mar 1 2024 12:00AM Close Reason: Services provided	WP Enrolled	Pending Letter		<input checked="" type="checkbox"/>
			01-TANF cash assistance and Medicaid	M-Mandatory	11958695-Enrolled	Close Date: Mar 1 2024 12:00AM Close Reason: Services provided	WP Enrolled	Pending Letter		<input checked="" type="checkbox"/>

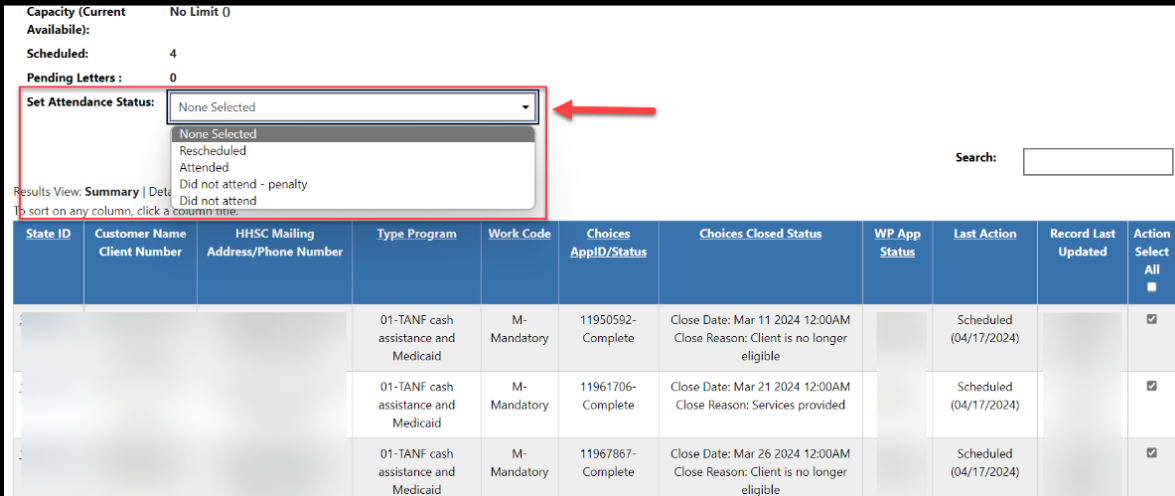
[[Update Selected Records](#)] [[Remove from Roster List](#)] [[Print Roster](#)]

Cancel Print Letters

Figure 27: Screenshot of Print Letters Button (Link)

Note: The print letter button officially schedules the appointment and removes the referral from the Outreach Pool. The system creates a partial application, and the application will display an **Incomplete** status. Staff may complete the partial application when the recipient attends the Initial Appointment.

22. To **Set Attendance Status** dropdown, select the status you are setting (**Attended, Reschedule, Did Not Attend – Penalty, Did Not Attend**).



Capacity (Current Available): No Limit (0)

Scheduled: 4

Pending Letters: 0

Set Attendance Status: None Selected

Search:

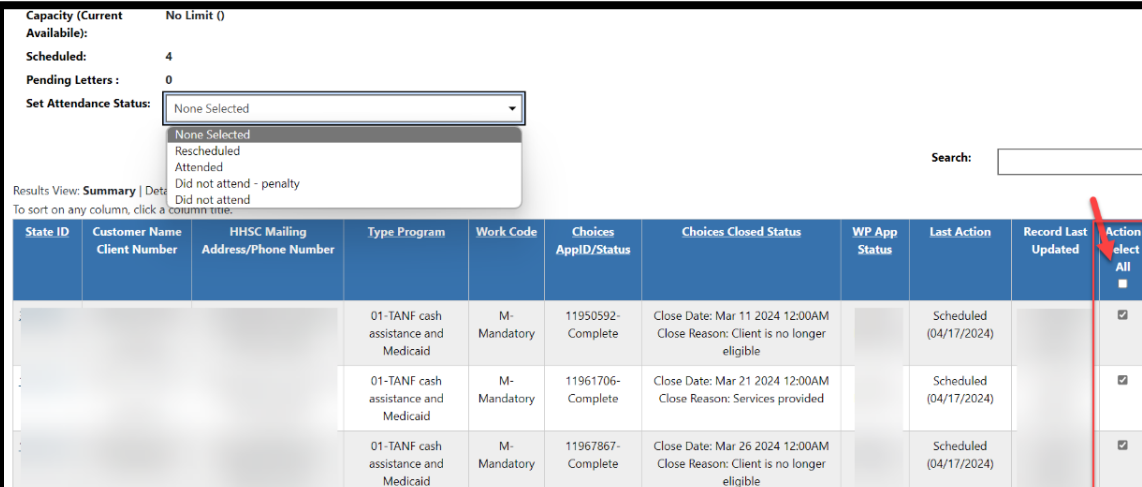
Results View: **Summary** | Details

To sort on any column, click a column title.

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
			01-TANF cash assistance and Medicaid	M- Mandatory	11950592- Complete	Close Date: Mar 11 2024 12:00AM Close Reason: Client is no longer eligible		Scheduled (04/17/2024)		<input checked="" type="checkbox"/>
			01-TANF cash assistance and Medicaid	M- Mandatory	11961706- Complete	Close Date: Mar 21 2024 12:00AM Close Reason: Services provided		Scheduled (04/17/2024)		<input checked="" type="checkbox"/>
			01-TANF cash assistance and Medicaid	M- Mandatory	11967867- Complete	Close Date: Mar 26 2024 12:00AM Close Reason: Client is no longer eligible		Scheduled (04/17/2024)		<input checked="" type="checkbox"/>

Figure 28: Screenshot of Set Attendance Status Dropdown

23. Select all appropriate records for the **Attendance Status** under the **Action** column.



Capacity (Current Available): No Limit (0)

Scheduled: 4

Pending Letters: 0

Set Attendance Status: None Selected

Search:

Results View: **Summary** | Details

To sort on any column, click a column title.

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
			01-TANF cash assistance and Medicaid	M- Mandatory	11950592- Complete	Close Date: Mar 11 2024 12:00AM Close Reason: Client is no longer eligible		Scheduled (04/17/2024)		<input checked="" type="checkbox"/>
			01-TANF cash assistance and Medicaid	M- Mandatory	11961706- Complete	Close Date: Mar 21 2024 12:00AM Close Reason: Services provided		Scheduled (04/17/2024)		<input checked="" type="checkbox"/>
			01-TANF cash assistance and Medicaid	M- Mandatory	11967867- Complete	Close Date: Mar 26 2024 12:00AM Close Reason: Client is no longer eligible		Scheduled (04/17/2024)		<input checked="" type="checkbox"/>

Figure 29: Screenshot of Action Column

24. Once records are selected and status is set, click the **Update Selected Record**.

Results View: **Summary** | Detailed
To sort on any column, click a column title. Current Sort: Work Code ascending

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All
			01-TANF cash assistance and Medicaid	G-Single parent/caretaker relative caring for a child under age 1	11950299-Enrolled		WP Enrolled	Scheduled (03/25/2024)		<input type="checkbox"/>
			01-TANF cash assistance and Medicaid	K-Mandatory - Pending an appeal on TANF sanction	11955345-Enrolled		WP Enrolled	Scheduled (10/31/2023)		<input type="checkbox"/>

[Update Selected Records] [Remove From Roster List] [Print Roster]

Figure 30: Screenshot of Update Selected Records Hyperlink

25. Repeat the process for all individuals who need attendance updated by first selecting the **Set Attendance Type**, then checking the **Action** column for the individual(s) and selecting the **Update Selected Records** hyperlink.

Scheduled: 2
Pending Letters : 2

Set Attendance Status:

None Selected
None Selected
Rescheduled
Attended
Did not attend - penalty
Did not attend

Results View: **Summary** | Detailed
To sort on any column, click a column title.

Figure 31: Screenshot of Set Attendance Drop Down Menu

26. The **Summary** roster will display each staff action under the **Last Action** column.

Results View: **Summary** | Detailed
To sort on any column, click a column title.

State ID	Customer Name Client Number	HHSC Mailing Address/Phone Number	Type Program	Work Code	Choices AppID/Status	Choices Closed Status	WP App Status	Last Action	Record Last Updated	Action Select All ■
			01-TANF cash assistance and Medicaid	M- Mandatory	11957029- Enrolled		WP Enrolled	Did not attend - penalty		<input type="checkbox"/>

1 Records Found

[\[Update Selected Records \]](#) [\[Remove From Roster List \]](#) [\[Print Roster \]](#)

Figure 32: Screenshot of Summary Roster

Outreach Management – SNAP E&T Program

1. Select the **SNAP E&T Outreach Management** link.

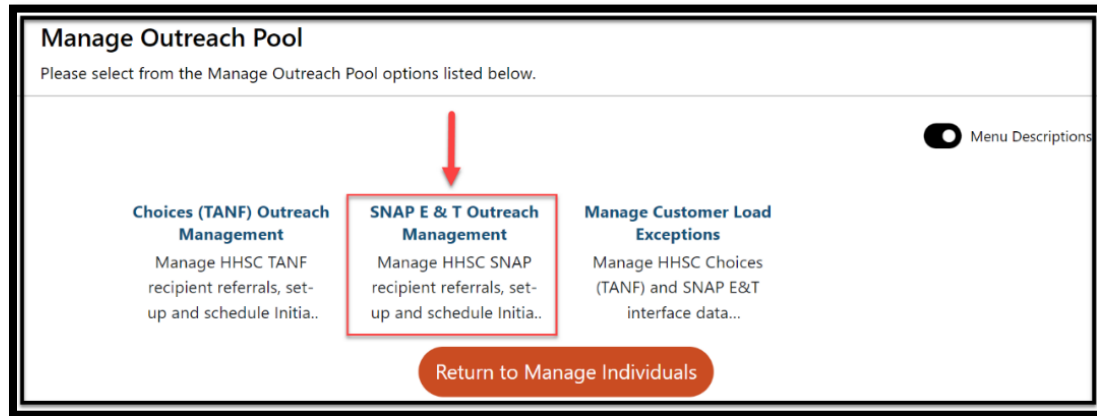


Figure 33: Screenshot of Snap E&T Outreach Management Link

2. Select the **SNAP E&T Appointment Schedules** link.

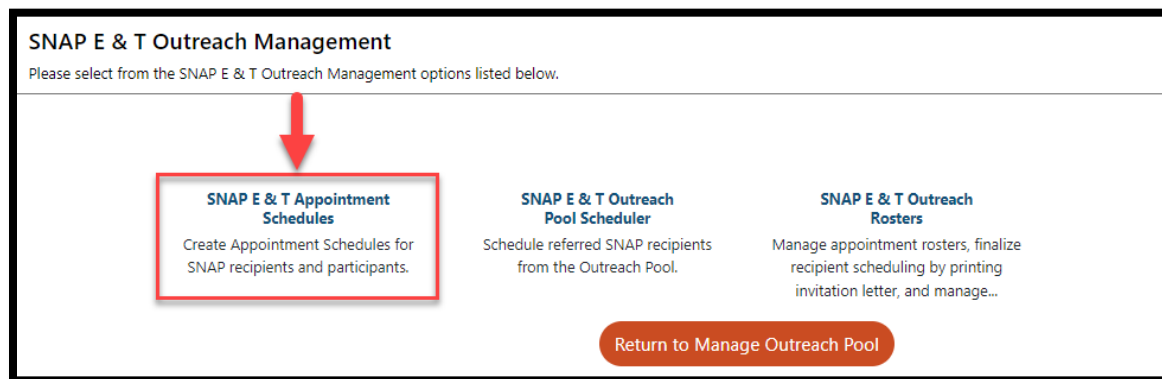


Figure 34: Screenshot of SNAP E&T Appointment Schedules Link

Note: The process for managing the outreach pool for SNAP E&T program is identical to the Choices Program. Return to page 3 of this desk aid under **Outreach Management – Choices** and continue all steps using **SNAP E&T Program filter** instead of the Choices Program.