

## Sample Comprehensive Narrative Entries for TWIST *Counselor Notes*

The following case scenarios show comprehensive narrative entries—case details and services provided—for The Workforce Information System of Texas (TWIST) *Counselor Notes*.

TWIST *Counselor Notes* must include the following types of information in the narrative, *as applicable*: title (a descriptive subject entry accurately reflecting the contents); who (for example, customer's name, employer's name); what (activity being reported); when (the date the activity was reported); where (such as customer's work or school location); why (to verify or document service activities); and how (for example, customer called, case manager called).

### **Scenario 1: Workforce Innovation and Opportunity Act Youth in Tutoring**

In September, a Workforce Innovation and Opportunity Act (WIOA) youth, Jo Brown, informed the case manager of failing grades in math. The case manager located a local businessperson available as a math tutor.

#### ***Action/Documentation***

The case manager enters:

- TWIST service code 72–*Tutoring/Study Skills Instruction*; and
- the following comprehensive narrative into TWIST *Counselor Notes*:

*Tutoring. September 15, Jo is failing math with a grade of 62. John Smith, owner of Smith Investments, has agreed to tutor Jo on a weekly basis at John's business location.*

Jo continues to participate in the program; during the October contact, the case manager asks Jo about the progress of the tutoring.

#### ***Action/Documentation***

If the tutoring is continuing, the case manager enters:

- TWIST service code 72–*Tutoring/Study Skills Instructions* for the October service activity; and
- the following comprehensive narrative into TWIST *Counselor Notes*:

*Tutoring. October 3, Jo is still working with tutor, John Smith. Jo's math grade has improved from 62 to 68. Confirmed grades with Jo's math teacher, Peggy Johns.*

## **Scenario 2: WIOA Adult Seeking Employment Following Training**

Jennifer Williams received WIOA adult-funded occupational training. In May, she graduated as a registered nurse and passed the state licensing exam. Jennifer is working with her case manager to find employment.

On June 12, the case manager provided Jennifer with four job referrals. The referrals were posted in WorkInTexas.com.

### ***Action/Documentation***

The case manager enters:

- TWIST service code *12–Job Search Assistance* for June 12; and
- the following comprehensive narrative into TWIST *Counselor Notes*:

*Job Search Assistance. On June 12, met with Jennifer and provided her with four job referrals, which were posted in WorkInTexas.com.*

On June 29, Jennifer returned to the Workforce Solutions Office and informed the case manager that she did not get any of the four jobs. The case manager provides Jennifer with six more job referrals and posts them in WorkInTexas.com.

### ***Action/Documentation***

The case manager enters:

- TWIST service code *12–Job Search Assistance* for June 29; and
- the following comprehensive narrative into TWIST *Counselor Notes*:

*Job Search Assistance. On June 29, Jennifer reports not being hired by any of the four previous referrals. Provided Jennifer with six more job referrals, which were posted in WorkInTexas.com. Advised Jennifer to let me know if she is hired or if she needs further assistance.*

On July 9, Jennifer returned to the office and informed her case manager that she did not get any of the six jobs. The case manager suggested that Jennifer might benefit from attending the Mock Interviews Workshop at the Workforce Solutions Office. Jennifer was scheduled for the next available workshop.

### ***Action/Documentation***

The case manager enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Mock Interviews Workshop. July 9, Jennifer has gone on numerous interviews but is having difficulty getting hired. Scheduled Jennifer for the Mock Interviews Workshop on July 18.*

On July 18, Jennifer attended the workshop.

***Action/Documentation***

The case manager enters TWIST service code 38—*Job Readiness/Employment Skills*.

**Scenario 3: Choices—Establishment of Self-Employment**

On September 19, Fred Andrews, a Choices customer, appears for his scheduled appointment and reports that he is starting his own business.

During the appointment, the case manager:

- reviews the documentation requirements (that is, federal tax forms, property title, deed, business accounts, business records, or a business plan) with participant, and Fred provides one of the required documents to verify that he is establishing a self-employment enterprise;
- reviews the reporting requirements for income (such as invoices or copies of checks) and expenses (receipts) for self-employment activity with Mr. Andrews;
- informs participant of any additional services available (for example, work-related expenses, support services); and
- schedules the next appointment date.

***Action/Documentation***

The case manager enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Establishment of Self-Employment. On September 19, Fred reported that he is starting a mechanics business. Reviewed self-employment documentation requirements, and Fred provided a business plan. The name of his business is Andrews Mechanic Services, located at 123 Workforce Street, Austin, TX 78701.*

*Reviewed reporting requirements for income and expenses for self-employment. Mr. Andrews states that he understands the reporting requirements and has already developed invoices for his business. Fred states that he understands and will ensure his invoices include all required information. Fred states that he understands and requests work-related expenses for the tools needed to start his business. Next appointment is Wednesday, September 26.*

## **Scenario 4: Supplemental Nutrition Assistance Program Employment and Training Retention**

On September 19, George Wilson, a Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T) participant, contacts his case manager and reports that he has found employment. George requests transportation assistance in order to get to work until the first paycheck. The case manager contacts local community-based organizations (CBOs) that provide such assistance. CBOs do not have transportation funds available, so local policy allows support service funds to be allocated. The case manager discusses the availability of job retention services, issues transportation support, and reports his employment to the Texas Health and Human Services Commission (HHSC).

### ***Action/Documentation***

The case manager:

- opens TWIST service code 39–*Unsubsidized Employment/Employment Entry* with sub-fund 44–*SNAP E&T Job Retention* for employment and job retention services;
- enters TWIST service code 203–*Transportation Services* for September 19;
- enters support services of \$40 for transportation assistance on the *Support Services* tab in TWIST under *Fund 87–SNAP E&T ABAWD*, sub-fund 44–*SNAP E&T Job Retention* for September 19–September 25;
- enters reconsideration for employment into TWIST under the *Good Cause* tab;
- completes and faxes HHSC Form H1817 to HHSC and places a copy in the case file; and
- enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Employment and Job Retention Services. September 19, George Wilson reported that he found a job at Austin Independent School District. He will be employed full time—40 hours per week. HHSC Form H1817 was completed and faxed to HHSC and a copy placed in the case file. Reconsideration was updated in TWIST under the Good Cause tab for employment. Service 39 was opened in TWIST with sub-fund 44 for employment and job retention services. Participant is in need of transportation assistance, and no local resources have funds. Transportation was issued, \$40 to cover September 19 to September 25. Transportation was updated in the Support Services tab with sub-fund 44.*

Because a job retention service was provided to the participant, the case manager updates the *Program Detail* with a notation in TWIST *Counselor Notes*. All SNAP E&T cases that report full-time employment must remain open.

### ***Action/Documentation***

The case manager:

- updates the TWIST *Program Detail* for October 5, for issuance of transportation services; and
- enters the following comprehensive narrative into TWIST *Counselor Notes*:

*October 5, Job Retention Services Request Date located in the Program Detail has been updated with today's date because transportation services have been issued. Program Detail will remain open for 90 days.*

### **Scenario 5: Trade Adjustment Assistance Benchmark Review and Failure**

Under Trade Adjustment Assistance (TAA) regulations, participants are required to contact their case manager for a benchmark review to monitor their progress in completing training; ensure that they are maintaining satisfactory academic standing; and determine eligibility for Trade Readjustment Allowances. Boards must make contact with customers on a monthly basis.

On January 15, TAA customer, Judy Jones, contacted her case manager for a benchmark review after a semester of study.

#### ***Action/Documentation***

The case manager enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Benchmark Review & Failure (1st). On January 15, Judy Jones came to the Workforce Solutions Office for her 30-day benchmark review. She just completed her first semester (fall) at Texas Community College and provided an unofficial transcript reflecting grades and full-time status (12 hrs.) during this semester:*  
*English Lit 3201 - D*  
*Political Science 3101 - C*  
*Intro to Algebra 3101 - D*  
*Art Appreciation 3202 - C*

*Judy has been placed on scholastic probation and is in danger of not completing training within the Reemployment and Training Plan (REP)–scheduled time frame. I issued a benchmark failure (1st warning) and advised her to consider use of campus tutoring services next semester. Judy was advised that she must provide evidence of progress in restoring academic standing at her next review appointment or the REP will need to be amended to reflect changes that may include occupational goal adjustment or a recommendation for termination of training. The next benchmark review is scheduled for February 15. Judy was reminded to register for spring semester courses, as stipulated in her REP, or secure my approval prior to any changes.*

### **Scenario 6: WIOA Participant Transportation Support Service**

Consuelo Martinez is a WIOA Dislocated Worker (DW) receiving vocational training through a locally approved Eligible Training Provider.

Consuelo attended a scheduled appointment with the case manager on October 23. Consuelo provided attendance records as required under terms of participation. Transportation assistance was requested.

***Action/Documentation***

The case manager verifies attendance records showing that Consuelo continues to participate in training as expected. The case manager reviews community resources and determines that there are currently no other sources for transportation assistance available.

The case manager:

- enters TWIST service code *1– Occupational Vocational Training* for October;
- enters TWIST service code *203–Transportation Services* for October 23;
- enters support services of \$30 for transportation assistance on the *Support Services* tab in TWIST under *Fund 20-WIOA Dislocated Worker* for October 26–30;
- enters support services of \$30 for transportation assistance on the *Support Services* tab in TWIST under *Fund 20-WIOA Dislocated Worker* for November 2–6; and
- enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Who: Consuelo Martinez*

*What: Continued participation/Transportation*

*When: 10/23/2020*

*Why: Participant continues to attend The College of Health Care Professionals 6/5/2020 to 1/28/2021 and is in training to earn Certified Medical Assistant Certification (due to the holidays the end date is estimated). The program is 35 weeks, 900 clock hours (classroom and externship). Training is full-time, Monday–Friday 8:00 a.m.–6:00 p.m., 40 hours per week.*

*Participant is currently enrolled in Module VI, taking APM 105 (A&P 5) and MA217 Medical Lab Procedures. This is the last module before the externship begins.*

*Participant hopes to earn an Honor Roll Certificate for this module. Last Module V, participant was awarded the President’s Honor Roll for a GPA of 4.0 and perfect attendance.*

*How: Today participant is providing signed attendance records for the 2-week period of 10/12/2020 thru 10/23/2020. Participant shows one absence on 10/14/2020, due to illness, and attendance shows this class was made up on Saturday 10/17/2020, so today’s transportation will not need to be adjusted. Currently there are no community partners that have funds to assist with transportation. Participant commutes 22.5 miles round-trip daily and is eligible to receive \$30 per week in transportation assistance for full-time training based on Board policy. Today the customer will be provided with \$60 in transportation assistance for the next 2-week period, 10/26–10/30 and 11/2–11/6.*

*What's Next: Consuelo's next appointment is 11/3/2020 at 10:30 a.m. Before transportation can be issued, participant will provide signed attendance forms and grades for Module VI and any information on the externship part of the training.*

### **Scenario 7: WIOA Youth Work Experience Justification**

Rudy Riggs is a WIOA Youth participant. During the appointment with the case manager on February 23, participant discussed recent job search activities following successful completion of training.

Rudy completed training in the accounting field in January. Work search has been unsuccessful. During interviews, employers have provided feedback to Rudy that they prefer to hire an individual with some work experience. Rudy's previous employment history in customer service and telework collections is unrelated to current job search and training.

Case manager discussed Work Experience as an available service, and Rudy expressed interest in this as a next step toward self-sufficient employment. The case manager contacted the Work Experience coordinator to discuss participant placement.

The case manager enters the following comprehensive narrative into TWIST *Counselor Notes*:

*Subject Line: Work Experience Justification:*

*Note Date: 2/23/2021*

*Activity: Work Experience*

*Analysis: Participant is in need of a Work Experience in order to obtain job experience. Currently experience is in customer service/collections but lacks experience in the training field of accounting/information management. The WE position will be as the assistant program director with Many Doors for Persons in Need. This 8-week position will provide the opportunity to use the skills and knowledge learned in training, while working closely with the program director to learn new skills and practical experiences to make a more hireable employee. Duties will include management; accounting duties; preparing operational budgets; planning budgets; developing organizational goals; information on grant writing; monitoring the facility to ensure a safe, secure, and well-maintained environment; and directing, supervising, and assisting in evaluating work activities of staff and volunteers, all under the direction of the program director.*

*Work Experience: Start/End 3/21/21–5/13/21*

*Location: Many Doors for Persons in Need*

*Position: Assistant Program Director*

*Address: 3507 Middle Way Austin, TX 48740 (512)222-4444*

*Contact: Ms. Mary Steele—Director msteele@electronicmail.com*

*ONET Code: 11-3011.00 Administrative Services Manager*

*Hourly Wage: \$10.00 hr.*

*Job Zone: 6.0 < 7.0*

*WE Duration: 8 weeks/320 hours*

*Daily Schedule: Monday–Friday 8 a.m.–5 p.m. with a one-hour unpaid lunch daily*

*8hr. X 5 days = 40 hr. work week X 8 weeks = 320 hours*

*Total WE Cost: \$3,936.00*

*Next Step: Meet with participant on March 7 to sign new hire paperwork and contract. Submit WE contract to supervisor for approval.*