Workforce Case Management System
Questions & Answers
WFCMS-04, Chg. 1
October 30, 2023

New or updated information is shown in italics. Information that has changed is shown by strikethrough.

ACRONYMS

API	Application Programming Interface
Boards	Local Workforce Development Boards
CCCM	Child Care Case Management system
EBS	*Employer Benefits System*
EDW	Enterprise Data Warehouse
EP	Employment Plan
GSI	Geographic Solutions Inc.
HHSC	Health and Human Services Commission
IDs	Identification Numbers
ITA	*Individual Training Account*
LWDA	Local Workforce Development Area
NCP	Non-Custodial Parents
PII	*Personally Identifiable Information*
POPs	Periods of Participation
RESEA	*Reemployment Services and Eligibility Assessment*
SNAP E & T	Supplemental Nutrition Assistance Program Employment and Training
TANF	Temporary Assistance for Needy Families
TDCJ	*Texas Department of Criminal Justice*
TTT	Train-the-Trainer
TWC	Texas Workforce Commission
TWIST	The Workforce Information System of Texas
UAT	User Acceptance Testing
UBS	*Unemployment Benefits System*
UI	*Unemployment Insurance*
UTR	*Unemployment Tax Registration*
UTS	*unemployment Tax System*
VOS	Virtual One Stop
WD	Workforce Development Letter
WDD	Workforce Development Division
WF CMS	Workforce Case Management System
WFR	*Workforce Reports*
WIOA	Workforce Innovation and Opportunity Act
WIT	WorkInTexas
WPP	Workforce Program Policy

DATA MIGRATION/*SYSTEM GO LIVE*

Will data currently in TWIST be pulled over to the new system? TWIST kept the account forever. Will the new system do the same?
Yes, some of the data/information in The Workforce Information System of Texas (TWIST) will be migrated to the new Workforce Case Management System (WF CMS). We are planning on migrating all individuals who have Periods of Participation (POPs) that were active on or after July 1, 2016. We plan to migrate all information on the individuals related to the POPs active on July 1, 2016, and newer. We will not migrate information from earlier POPs that closed prior to July 1, 2016. No, WF CMS will not keep all information forever. We will comply with the state record retention schedule.

When WF CMS goes live will TWIST remain accessible for auditing or prior case history access?
TWIST will remain accessible for a period after WF CMS goes live. It will be necessary to keep TWIST live at least until the Non-Custodial Parent (NCP) program goes live in WF CMS. This will at a minimum be several months. Certain information will be migrated to the Enterprise Data Warehouse (EDW). Decisions are being made on which information will be migrated and who will have access to the information.

Will TWIST be down for any length of time?
To be clear, when TWIST is brought down for conversion to the WF CMS, it will permanent, with only a few exceptions.

The first exception is the NCP program. GSI is developing a new module for the NCP program. It will not be ready on January 16. Until it is available, the NCP program will continue to function in TWIST, and all data related to the NCP program must be entered into TWIST. Therefore, we will maintain NCP staff members' and NCP program supervisors' access to TWIST.

The second exception is allowing quality assurance and/or monitoring staff continued access for a brief period. Although the decision on how long to allow that access is not yet final, we anticipate that it will be only for a brief period, possibly 30–90 days. Once WF CMS goes live, no new data—other than NCP—will be entered into TWIST. The data will no longer be current after January 16, 2024.

The third exception is for child care staff. The new child care case management system is tentatively scheduled to go live about three weeks after WF CMS, on February 5, 2024. As such, child care staff will need to have continued access to TWIST until the new child care system goes live.

When new WIT went live, we were without WIT and TWIST for several days. Do we know how long the systems will be down for WF CMS to go live?
We've been working with GSI tried to minimize the down time for the conversion or migration. We anticipate bringing TWIST down after the close of business on Thursday, January 11, 2024, and bringing WIT down after the close of business on Friday, January 12, 2024. We expect WIT and WF CMS to be available early on Tuesday, January 16, 2024. We do have the benefit of a federal holiday the day before go-live, which affords us an extra "non-work" day.

How will employers and job seekers know WIT will be down?
Prior to WIT being down, we will put notices on the TWC website and WIT. In addition, we will place notices on Unemployment Benefits Services (UBS) for claimants, and Employer Benefits services (EBS), Unemployment Tax Registration (UTR), and Unemployment Tax Services (UTS) for employers, to announce the time that employers and job seekers will not be able to access WIT.

When the TWIST caseload is migrated to the WF CMS, will the local boards be responsible for this or will TWC handle the current existing client migration?
TWC will be responsible for the migration of data from TWIST to WF CMS.

In the event of some kind of error during migration to WIT is there some kind of procedure for us to follow in writing?
We are planning a hotline or call-in number to address issues immediately following go live. We have not determined how long to maintain the hotline. It will depend on the calls we are receiving.

It would be very difficult to pre-determine what issues might arise with data migration so having desk aides or written guidance available to address potential errors in data migration at the time of go live is not likely. However, if errors in data migration do occur, we will address and get information out as quickly as possible.

Will the dollar amount from the service and support service tab be migrated?
No, the dollar amount will not be migrated.

Is the Individual Training Account (ITA) tab info moving over?
No, it is not. ITAs are tracked differently in the WF CMS.

DATES

What is the expected release date of the new system?

The planned go-live date for the new Workforce Case Management System is January 16, 2024. The basic case management functions will go live in January 2024, however, there will be some functionality that will not go live at the same time. As an example, the apprenticeship module currently functions as a standalone module. It will continue to do so for a period prior to it being incorporated into WF CMS. The new NCP program module will not go live in January 2024. Until NCP is incorporated into the WF CMS, the NCP program will continue to be documented using TWIST.

Is TWC also working on a timeline to update all state policies and directives, as many are already active but reference old terms and functions? Most of these reference TWIST and many are related to TWIST functionality, even for program directives.

Yes, Workforce Program Policy (WPP) is working to update guidance as needed. As noted, there are many documents that refer to TWIST. WPP is planning to update as many documents as possible prior to go live. However, as usual there are competing priorities. Any efforts necessary because of the 88th Texas Legislature or federal actions must be prioritized over updating Workforce Development (WD) Letters and program guides.

DOCUMENT MANAGEMENT

Will there be a phone app for customer access?

No, there will not be a phone app for the case management functions. The WF CMS is not intended to be employer or job seeker facing. It is designed as a staff system. There is an existing Job Seeker/Customer mobile app for WorkInTexas (WIT), but it is focused on searching for and applying for jobs.

Will customers be able to upload documents into WF CMS? For example, will they be able to upload a driver's license or birth certificate or pay stubs?

Keep in mind that the WF CMS is not intended to be a customer facing system. The WF CMS will provide a mechanism for ensuring validation of eligibility by requiring staff to affirm the documents provided by the customer. Document upload is limited by document type. The allowable document formats include PDF and Image formats like (.PNG, .JPG, .GIF). WIT does provide functionality for customers to upload documents. If staff would like to make use of this capability, they will need to work with customers to ensure that the customer's account is available for login. Assistance may be needed from staff to ensure customers can successfully log into their account. While it is possible for a customer to upload a document into WIT from a smart phone, it is a much simpler process if done using a computer. We would expect that in most situations, case managers will upload the client documents into WF CMS.

Will all case documents be managed in this system? Are we required to use the file tracking, or can we use our own such as Cabinet?
The Texas Workforce Commission's (TWC) preference is that all documents be uploaded into the new WF CMS. However, we know some boards have either purchased or leased software that does workflow and document storage - this system will have those capabilities. While we would prefer Boards use the functionality in the system to store all documents, we do not want to disregard the funds Boards have expended on those external systems. However, for those Boards who have a lease, when the contract is going to expire – we encourage shifting to the WF CMS. One substantial benefit to using the WF CMS for document storage is related to monitoring reviews. Your Local Workforce Development Area (LWDA) will not need to upload documents for the review if the documents are available in the WF CMS. Monitoring staff will access the needed files directly.

Aside from the capability to upload documents, is TWC working on a system that will help us become paperless?
TWC is not investigating a paperless system at this time.

Will there be a way to upload measurable skills gains certificates?
Yes, measurable skills gains certificates can be uploaded in the same way as other documents.

For the document storage functionality, are there ways to tag the documents or to make folders for storage so that it's easy to find the document?
Yes, you will select a document type and add keywords that will help you to find the document later. Multiple keywords can be used on each document.

EMPLOYMENT PLAN

Are Boards required to enter Employment Plans (EPs) in WorkInTexas.com for current case-managed program participants on or after the effective date (June 26, 2023) of WD Letter 02-23? If staff migrate a participant's EP from TWIST to WorkInTexas.com, are they required to enter TWIST service 68 and a case note to document that migration on an existing record?
WD 02-23 requires Boards to ensure that staff enter EPs in WorkInTexas.com for all new participants, as of June 26, 2023. Though Boards may choose to document any participant EPs in WorkInTexas.com, this WD Letter does not require participants enrolled prior to June 26, 2023, have their EPs migrated or recorded in WorkInTexas.com.

If an EP is moved from another system into WorkInTexas.com with no changes to existing goals/objectives, staff are not required to enter TWIST service 68. Under this circumstance, staff should enter a TWIST Counselor Note to document that the EP was moved into WorkInTexas.com but no changes were made to the participant's plan, or individual goals or objectives.

For case-managed customers (those with program details managed in TWIST), staff are required to enter TWIST service 68 on a participant's TWIST service record (and include a narrative Counselor Note) when:

- a new EP is created in WorkInTexas.com;
- an update is made to an EP, including a goal or objective is added, closed, or altered; or
- an EP is closed.

Note: The WorkInTexas.com system allows staff and participants to sign the EP electronically, or they may print, sign, and upload back into the Documents folder in WorkInTexas.com for a participant (if required by local Board policy).

For new participants effective June 26, 2023, will all employment plans require a signature and a service 68 entered in TWIST?
TWC does not require that the EP be signed. However, the local Board/Contractor may have local policies/procedures that require a signed printed employment plan. Workforce center staff should follow their local policies/procedures. And YES, until the new case management system goes live in 2024, the EP service 68 will need to be entered in TWIST as it is currently required.

What if there is already an existing WorkInTexas.com IEP/ISS from another program?
The intent of TWC guidance is to provide Boards with information on the adoption of a universal employment plan, providing for unified goals and objectives for participants to achieve successful outcomes without regard to program enrollment. Local workforce center staff will not be able to create multiple WorkInTexas.com IEP/ISS for job seekers/participants. As indicated in WD Letter 02-23, "NLF – Board must ensure Workforce Solutions staff documents the participant's program in the goal description. For example, staff may enter "Choices Goal" at the beginning of the description to identify that it is a goal specific to the Choices program."

GENERAL

Will we be able to view quarterly wages in the new WF CMS for participants like we can in TWIST Wage Detail?
Yes, quarterly tax wages will be available.

Do we have to abandon our financial systems and use the financial module in the Virtual One Stop (VOS)?
No, there is no expectation at this time that Boards abandon their own financial systems to use the financial module in VOS. However, we do encourage Boards to use and test the basic financial module in VOS to determine how it can be used and whether it meets the needs of the LWDA.

How will the speed of WF CMS be compared to TWIST?
The speed of WF CMS will be comparable to the speed of WIT.

Will there be a common intake form that will be utilized for Federal and Non-Federal programs?
The WF CMS will have a common intake wizard and program specific wizards. Use of the common intake wizard will allow staff to enter customers into multiple programs simultaneously (example: WIOA, Trade, Wagner Peyser) and only answer the common program intake questions once using a single program application wizard.

Will this system have any communication with the new child care management system?
Case managers using WF CMS will be able to send referrals for child care services directly to the new Child Care Case Management (CCCM) system. The CCCM vendor is working on the application programming interface (API) design. We anticipate that this is one of the functions that may not be available at go live on January 16, 2024, but will roll out at a later date. We will keep you informed as this effort progresses.

How will the customers be identified? Will the TWIST ID carry over?
TWIST IDs will be in the WIT database but will not be on the screen. It will be available for querying using ad hoc queries. However, we will consider providing a cross-reference list at go live that may be helpful.

How is TWC planning to clean up duplicate accounts in TWIST? Will there be a report to identify duplicate accounts in TWIST prior to migration?
We have looked at some automated ways to identify duplicate accounts prior to migration. We do not have a final decision at this time. It is likely we may be able to merge some duplicate accounts. It is also likely we may need to provide a list to Boards to review and resolve other duplicate accounts prior to migration to WF CMS.

With the new system, when a customer comes in staff may search using a social security number. If the individual is already enrolled in another program, their information will display. If the information does not appear, the individual is not already enrolled in another program.

Can contractor staff be part of the testing project?
Yes, we would encourage Boards to have contractor staff be part of the testing team. They will be the ones on the front line using the system. The User Acceptance Testing (UAT) phase of the project is projected to start in mid-August and run through mid-November. We will have a dedicated 3-week External Stakeholder testing event in late October for volunteers that do not want to commit to testing during the entire 3-month UAT timeframe.

Will there be a function to prevent a customer from being able to create multiple WIT accounts?
There is no way to avoid the possibility of an individual creating a duplicate account. Duplicate accounts occur from many causes, the individual forgets they have registered and creates a new registration, the individual accidentally keys the wrong social security number, and the registration does not return with the correct social security number, etc. However, there are methods in place in WIT to help identify potentially duplicate accounts and merge them if needed. Staff with appropriate permissions in the system will have the ability to merge accounts.

Will the new WF CMS have a flag/alert on a case if at some point it was identified that a customer committed fraud/abuse of support services assistance?
No, this functionality is not available. We do think this would be a great system enhancement for the future. It would take some careful planning to ensure proper use. On the employer side, we can lock out/unlock employers accounts and users.

How flexible will the WF CMS be - can we adjust tabs to identify sections, folders, organize these in different ways?
Staff can adjust the staff dashboard. The dashboard provides a set of configurable out-of-the-box widgets that can be turned off or on. The widgets can be repositioned as it best suits staff. For example, the most frequently used widgets can be moved to the top of the screen. In addition, staff can "pin" customers or pages/screens that are frequently used.

Currently WIT Liaisons can merge WIT accounts. The bottleneck with TWIST comes with having to submit Service Now tickets to TWC. Will TWIST Liaisons be able to merge TWIST accounts?
It is our intention to allow liaisons to merge accounts. We are still working on roles and permissions. We are considering a Labor Exchange Liaison, the current WIT Liaison role, and a Case Management Liaison role, the current

TWIST Liaison. Regardless of whether it's one or two roles the intention remains to allow liaisons the ability to merge accounts.

Are counselor notes getting locked after 10 days in the new WF CMS?
No, however there are many privileges related to counselor/case notes. There are permissions related to viewing suppressed case notes, being able to delete case notes, being about to see deleted case notes, restrictions of only seeing case notes created within your Board, etc.

How will medical/confidential information be stored?
We do not encourage storing medical or confidential information in the WF CMS. We believe it would be a better course of action to indicate results in a non-specific manner, i.e., have reviewed documentation from a medical doctor indicating customer may work 20 hours per week.

Will all Boards have access to all accounts or how will cross customers be handled?
Staff using WIT will have the ability to bring up customer records for any customer in the system and assist them. The availability of case notes and other information across Boards may be restricted by permission. Cases can be transferred from office to office or staff to staff within a Board without TWC state staff assistance.

Cases can be reassigned across Boards by TWC state staff once the originating Board closes out all open, in-progress services being provided.

Will Boards be able to create and adjust the workflows inside the WF CMS as needed based on local procedures?
No, unfortunately that is not possible. If the workflow within WF CMS is turned on, it must be the same process for all Boards.

The Quarter plus 20 ends shortly after go-live. How will that affect data entry?
We highly recommend that everyone complete all necessary end-of-quarter data entry ***before*** *TWIST is brought down on January 11, 2024. The end of the Quarter +20 period will be a few days* ***after*** *WF CMS goes live. Even with a smooth transition to a new system, staff will be getting used to how the new system functions. Regardless of how smooth the transition may be, it will be difficult for staff to make final Quarter +20 entries immediately after WF CMS goes live. We strongly encourage staff not to wait. Complete the end of quarter data entry before January 11.*

Will the new system affect program outreach?
The new WF CMS does have program outreach functionality. However, as with any transfer to a new automation system, staff continue to adjust for a period. As such, we suggest you consider program outreach for Choices, SNAP, and Reemployment Services and Eligibility Assessment (RESEA). Your workforce area may determine that it should expedite outreach while TWIST is still functional by calling in larger numbers of program participants, for more or larger orientation sessions than normal. Your workforce area may determine it should pause orientations for a day or two immediately after go-live as staff members become acclimated to the new system. We understand that there is no one-size-fits-all solution, but we recommend that each area determine what will best suit its needs and encourage you to give some thought about that transition period.

What will the new system be called?
The new WF CMS will be part of the WorkInTexas system. There was significant effort conducted on the name, logo, color scheme, font, etc. prior to WorkInTexas going live. Since WorkInTexas is the public facing part of the system, we will not be changing the name.

Will the system have the ability to track a case of support services abuse or when fraud occurred? We rely on the case manager notes for it. We reach out to the customer to recuperate the support services, but it would be helpful if the case could be flagged for future reference.
No, this functionality is not available. We do think this would be a great system enhancement for the future. It would take some careful planning to ensure proper use. On the employer side, we can lock out or unlock employers accounts and users.

Our understanding is that the Boards use the PIRTs system to track and report fraud cases and collections. We expect this will continue.

Is this also true for fraud for child care customers (flagging case for future services)? If so, will there be new TWC Guidance at that time of rollout? Currently, they cannot come into care except for 2 exceptions if they owe recoupment.
Our understanding is that the Boards use the PIRTs system to track and report fraud cases and collections. We expect this will continue.

Will there still be quarter + 20 deadlines in new system?
Yes, the new WF CMS will not change the Quarter +20 deadlines. We strongly recommend that all 4th quarter 2023 data entry be completed ***before*** *TWIST is brought down on Thursday, January 11, 2024.*

Will the Electronic Document Management system also be available starting from go live?
Yes, the document management function will be available at go live.

Are counselor notes getting locked after 10 days in the new WF CMS?
No, however there are many privileges related to counselor or case notes. There are permissions related to viewing suppressed case notes, being able to delete case notes, being able to see deleted case notes, restrictions of only seeing case notes created within your Board, etc.

We understand that there is concern about case notes not being locked down—and staff being able to make changes at any time. When edits are made, the system will date stamp when a change was made. There is history of when activities occurred, and which staff made a change.

Will there be one screen to see the start and end dates for active Periods of Participation as the customer moves in and out of programs, or will we have to rely on looking at all of the open Programs on the Program Tab in WIT?
TWC and GSI are working to ensure that the Programs tab in the Case Management Profile section for staff will display 'Number of Days to Common Program Exit' for open periods of participation. Additionally, each open program included in TWC's common exit policy is expected to include 'Days to Soft Exit' and 'Projected Exit Date' fields for staff review.

Do we need to continue submitting merge requests on duplicated customer TWIST records?
Yes, continue to submit your merge requests as you currently do until new guidance is provided.

What date should we go by, service or application date when looking at whether to submit a merge request?
Staff can perform merges in WIT, there is no date to submit. The date that is recorded in the WIT table is the merge date. If a board needs help, they can submit a WIT Service Now ticket for Workforce Automation to assist.

For TWIST, if the merge involves a TWIST customer record created 7/1/16 or later – submit the merge request. If the merge involves a TWIST customer record with a POP exit date 7/1/16 or later – submit the merge request.

In the new WIT system will merges for duplicate customer files need to be sent up or is there a way to do this at the Board level?
WIT Liaisons currently perform merges in WorkInTexas. That will continue with the inclusion of case management in WIT. The number of WIT Liaisons will be increased due the increased maintenance load of both labor exchange and case management. The number of liaisons per board has not been determined at this time.

OFFICE STRUCTURE

If offices 4 and 5 are going away what will replace it?
Boards had to get creative to overcome system limitations in TWIST. Boards set up an office level 3, 4 or 5 to identify a special project. This allowed them to isolate the participants, services, and outcomes from that project. Boards also used offices to differentiate between contractors or service providers. TWIST did not have any rules on office structure. As a result, TWIST offices did not always represent an actual brick and mortar office. Often, when the reason for the TWIST office ended, the office was not closed or inactivated. The result was literally thousands of offices in TWIST that were no longer being used. The new WF CMS will have much more functionality than TWIST. We believe the functionality of the system will provide Boards the ability to capture all the information needed at a very granular level therefore eliminating the need for multiple office levels.

PROGRAM: Choices/Supplemental Nutrition Assistance Program (SNAP)

Can you tell us how HHSC/TIERS data will be pulled into the system for programmatic eligibility purposes?
Staff have worked with Geographic Solutions, Inc. (GSI) and the Health and Human Services Commission (HHSC) to ensure interfaces will continue to work as they do in TWIST.

Timely data entry is crucial for Choices performance. If the system is not stable, it will make it harder for us to meet our performance.
Yes, this is correct and no different than with TWIST. We had situations with TWIST where it was down for a day or more. Certainly, if this happens on the last day or two before a data entry deadline, it presents challenges. Whether TWIST, WIT, WF CMS, or any other system, we encourage data entry to be done as soon as possible, not waiting until near the data entry deadline. As we have done in the past, if there was a system issue preventing timely data entry, we would certainly consider the situation and all the factors to determine whether some relief could be offered.

Will tracking of Penalties and Good Cause for Choices and SNAP be implemented in new system?
Yes, penalties and good cause are fundamental elements of both Choices and SNAP and will continue in the new WF CMS.

Will we be able to see past penalties dates for Choices participation?
Yes, there will be a history screen and penalties will be displayed on the history screen. Newest penalties will default to the top of the list.

Will tracking of participation hours for Choices be implemented in new system?
Yes, participation hours will be tracked in the new WF CMS.

Will the SNAP and Choices Customer Load Exceptions be included in the new system?
This is not a feature of the base system. We are working with GSI to provide this capability. What are called "Customer Load Exceptions" in TWIST may also be called "Interface Notes" in VOS.

We have proposed that Customer Load Exceptions or Interface Notes be displayed in VOS and that staff have the capability to process the notes in VOS. More guidance will be issued on how to handle the Customer Load Exceptions or Interface Notes.

For the SNAP 1817 and reconsideration process, will this be an automated/interfaced process with TIERS in the new WF CMS or will we still need to fax to HHSC?
HHSC will not be making any changes to their end of the interfaces. As such, the SNAP 1817 process will remain the same. It will need to be faxed to HHSC.

Will the SNAP 1836 process be automated in the new WF CMS?
No, HHSC is not making any changes to their end of the interfaces. The SNAP 1836 process will remain the same.

Rosters for outreach for SNAP and Choices for upcoming events will they migrate over?
TWC anticipates that SNAP E&T and Choices rosters scheduled on or after December 1, 2023, will be migrated into WorkInTexas.com for these programs.

Will the customer load exception list be transferred over? If yes, will this be presented at TTT?
Yes, it will be in the system. SNAP and Choices Customer Load Exceptions are not a feature of the VOS base system. We worked with GSI to provide this capability. What are called "Customer Load Exceptions" in TWIST may also be called "Interface Notes" in VOS.

We have proposed that Customer Load Exceptions or Interface Notes be displayed in VOS and that staff have the capability to process the notes in VOS. However, this will not be ready for the TTT sessions. We will provide more information prior to go-live.

When should we expect updated Choices and Snap E & T Guide referencing the processes in the new CMS?
Workforce Program Policy is working to update guidance as needed. In addition to the Choices and SNAP E&T guides, there are many documents that refer to TWIST. WPP is planning to update as many documents as possible prior to go live. However, as usual there are competing priorities. Any efforts necessary because of the 88th Texas Legislature or federal actions must be prioritized over updating Workforce Development (WD) Letters and program guides.

Will the HHSC data in TIERS migrate into the new system for Choices and SNAP?
Staff have worked with GSI and HHSC to ensure interfaces will continue to work as they do in TWIST.

REPORTING

Will InfoMaker still be compatible?

No, the new WF CMS will not use InfoMaker. WF CMS has a library of reports available. In addition, it has tools to create ad hoc or customized reports. We are also exploring some additional reporting capabilities with GSI using Microsoft PowerBI. The full extent of what might be available using this reporting tool is not yet known.

Will there be management functions such as a Dashboard or reporting functions? If so, will the reports be customizable either by office or role?
Yes, there is a dashboard and customized reporting available. In addition, the system has a large library of standard reports.

Will we have access to the source data to query the data we need to run our local reports?
We have a working group in place that is exploring options. There will not be direct access to the backend WIT tables, but the PowerBI reporting front end may be able to address some of those needs. Additionally, there are ad hoc report and query capabilities in WIT that can be leveraged. Once queries have been worked out, if they are used frequently and are common enough to apply to all or most of the Boards, we can turn them into "Custom Reports" and make them available to staff in a more standardized and permanent way, like Standard Reports.

Will the WF CMS have the ability to make customized reports? Will there still be ad hoc query capabilities?
WF CMS has a large library of reports available. In addition, it has tools to create ad hoc or customized reports. Once specialized queries have been defined, if they are used frequently and are common enough to apply to all or most of the Boards, we can turn them into "Custom Reports" and make them available to staff in a more standardized and permanent way, like Standard Reports.

Will there be any cleanup of WIT reports—to eliminate those that are not used?
Early in this project, the team reached out to Boards to determine which TWIST reports were still being used. Based on that information, staff reviewed all the TWIST reports Boards indicated they were still using. The WF CMS team compared the needed TWIST reports to the library of WF CMS reports to see how they aligned. If there was no WF CMS report that served the same purpose as a needed TWIST report, we requested GSI build the report.

For reports, will the system have set reports for oversight for each specific program available?
The WF CMS will contain many case management report options, by program (Wagner Peyser, Choices, SNAP, WIOA, and TAA). In addition, we have requested GSI create some of the TWIST program reports that staff and management are accustomed to.

TWC's Information Innovation and Insights division is working on developing additional performance oversight reports that will be available to certain Board staff by using Tableau.

When will Workforce Reports go down? Will it be at the same time as TWIST?
TWIST will not be fully retired at the time of go live in January 2024. The new NCP program module will not go live until sometime later in 2024. Until NCP is incorporated into the WF CMS, the NCP program will continue to be documented using TWIST.

Since reports will need to remain active in the Workforce Reports (WFR) system to support NCP, WFR will not be retired until the NCP program is migrated to the WF CMS and TWIST is retired. However, while WFR are still available, not all staff will continue to have access and more importantly, once WF CMS goes live, no new data—other than NCP—will be entered into TWIST. Non-NCP data will no longer be updated after January 16, 2024.

SYSTEM FUNCTIONALITY

Will we be able to track work experience, ITA, and support service issued amounts and will be able to extract that data in the new system.?
Yes, those are trackable items in WF CMS. Information in the TWIST ITA tab will not be migrated to the new system.

Will we still be able to include optional questions?
No, WF CMS does not have a feature to include optional questions. However, in reviewing the optional questions in TWIST, in the vast majority of instances the capabilities of WF CMS will compensate for the lack of the optional questions.

Will WF CMS keep records forever like TWIST did?
No, WF CMS will comply with the state record retention schedule. We are planning on migrating all individuals who have POPs that were active on or after July 1, 2016. We plan to migrate all information on the individuals related to the POPs active on July 1, 2016, and newer. After WF CMS go live, records will be purged in compliance with the records retention schedule.

Because of the statutory requirements for the Trade program, we will maintain older Trade records. However, these records will not readily be accessible in WF CMS. We are working on a process for Boards to request Trade data beyond the 5-year period if necessary.

Our understanding is that only 3 years' worth of UI wage data will be available in the WF CMS. Is that correct?
Yes, that is correct that only three years' worth of UI data will display in the WF CMS. We are working on a process for Boards to request UI wage data beyond the 3-year period if necessary.

Are there permissions that can be set to block staff from working after hours/weekends since it's web based?
No, there are no permissions that restrict the hours staff can log in.

SYSTEM STABILITY

There have been many challenges with WIT being down, how will this be different?
Every automation system has its challenges. No system can be available 100% of the time. GSI has done things to try to help ensure that the system stays up more. GSI has two bi-coastal hosting facilities that provide the hardware, security, and infrastructure to support the states they serve. The bi-coastal facilities include full redundancy with real-time replication of data to shadow hosting facilities to eliminate the chance of data loss due to interruption of service.

How will this affect our performance measures if we do have some issues with the system. Will that be considered?
This is no different than with TWIST. We had situations with TWIST where it was down for a day or more. Certainly, if this happens on the last day or two before a data entry deadline, it presents challenges. Whether TWIST, WIT, WF CMS, or any other system, we encourage data entry to be done as soon as possible, not waiting until near the data entry deadline. As we have done in the past, if there was a system issue preventing timely data entry, we would certainly consider the situation and all the factors to determine whether some relief could be offered.

How will TWC communicate when the new WF CMS has defects or goes down. Currently TWC communicates WIT defects via a Teams Chat however, non-TWC staff such as Boards and contractors are not able to access the TWC Teams Chat.
We know that communication is vital. When VOS goes down, we will communicate through email distribution lists and other avenues like banner pages to reach as many as possible. Case Management will bring in a bigger audience than current Labor Exchange. Internally we are working to determine what mechanism(s) to use to communicate information about system availability and fixes to a broader audience, including banner pages on TWC home page, WIT banner, additional distribution list and messaging capabilities that are built into VOS.

SYSTEM TESTING

What can you tell us about user acceptance testing?
We are in the UAT phase. TWC staff are doing functional testing, conversion testing, and interface testing. Functional testing tests the functionality of the

system to ensure it performs as intended. Conversion testing ensures that information from TWIST is correctly migrated to the new system. Interface testing ensures that the interfaces between WF CMS and HHSC, Texas Department of Criminal Justice (TDCJ), Unemployment Insurance (UI), and other systems function as designed.

In addition, we have both general UAT and external stakeholder UAT that Board and contractor staff may participate in. We currently have 92 board and contractor staff from 10 different workforce areas who are assisting with general testing. These staff are working in a test environment. They are going into the system, creating customers, entering services, creating case notes, etc. If they find something that does not appear to be working correctly, they communicate that with TWC staff on a regularly scheduled call. TWC staff further investigate the potential problem and if necessary, create an issue with GSI for correction.

What is the difference between general testing and external stakeholder user acceptance testing?

General UAT: August 21st through November 17th

- *This would involve testing from mid-August through mid-November, as your schedule allows. This provides a longer period where you can test as you have time. Time expectations during general UAT testing are minimal. You can select the cases and/or functions you prefer. You can do this as you have time to do the testing. This will give you maximum opportunity to explore the new system and its functions, but you will not have daily oversight and communications with the WF CMS project testing team.*

External Stakeholder UAT: October 30th through November 17th

- *This activity is more structured than the general UAT. Participation would only be during a 3-week period of 30th through November 17th. It will involve regular oversight and communication with the WF CMS project testing team. Time expectations for external stakeholder testing are more significant than for general UAT. We expect a **minimum of eight hours testing per week** during this 3-week period. We will require participation in scheduled calls to discuss any issues that occurred during your testing activities.*

Is it too late to add testers?

No, it is not too late to add testers. We are particularly interested in adding testers for the external stakeholder testing period from 30th through November 17th.

I am participating in the UAT, but we are unable to outreach in the system. During the train the trainer sessions will we have access/be trained to clear load exceptions and outreach for Choices and SNAP?

The Board and contractor staff participating in the general testing are working in a test environment. The test environment does not contain any *real data or Personally Identifiable Information (PII). It does not have a connection to the interface with HHSC.*

SNAP and Choices Customer Load Exceptions are not a feature of the VOS base system. We worked with GSI to provide this capability.

We have proposed that Customer Load Exceptions or Interface Notes be displayed in VOS and that staff have the capability to process the notes in VOS. However, it will likely not be ready for the TTT sessions. We will provide more information prior to go-live.

TRAINING

Have you decided how many slots each board will have for the Train-the-Trainer (TTT) sessions? May other staff attend or is it limited to the designated trainer?

Training and Development is planning five train-the-trainer sessions beginning in mid-September. Sessions will be conducted virtually. Each session will consist of 10 days. For the first four sessions each Board will designate a trainee. This person will be responsible to train Board and contractor staff from their Workforce Area.

If the Workforce Area has a large training room available, they may include more staff in the TTT sessions than just the designated trainer(s). However, we ask that only the designated trainer interact with the training staff presenting the material. The purpose of this is to maintain some level of control and ability to stay on schedule during the sessions.

While the number of days in a session—10 business days is long, there is a schedule that indicates what topics are to be covered each day. Staff may choose which days are important to their job functions.

With the WIT implementation, we learned there were staff that went to TTT sessions that did NOT go back to their areas and do training on WIT. We cannot afford for that to occur again. We are aware the training for WF CMS will be intense and lengthy. We must ensure the trainers who attend the TTT plan to provide training to any local staff who do not sit through the TTT. The alternative is that all or some portion of staff would attend the TTT sessions and will not need subsequent training by the area’s designated trainer(s).

Are there any more details on the train-the-trainer sessions?

The first of four train-the-trainer sessions begins Monday, September 18 and runs through September 29. Each of the four sessions is 10 days long. There is a specific topic each of the 10 days.

Session 2 – 10/2-13
Session 3: 10/16-27
Session 4: 10/30 – 11/10

The training is hands-on training. Your area's designated trainer will be logged into the computer and will follow along with a GSI trainer. Your designated trainers will learn the new WF CMS and train the rest of the staff in your workforce area.

To accommodate more staff seeing the train-the-trainer sessions, your designated trainer may do the training in a conference room and other staff can sit in and watch. They will have not be able to do the hands-on training and will not be able ask questions directly of the GSI trainers. All questions must come through your designated trainer.

Will the four sessions have the same information available, or do we sit in on each session?
Yes, each of the four sessions will have the same information. It is not necessary to sit in on all four sessions. However, you may. If there is something you are not clear on or don't remember, you may choose to sit in on a particular day to hear certain information again to improve your understanding.

Will there be a recording of the Train-the-Trainer sessions? When will that be available?
Yes, we are working with GSI to ensure that there is a recording available. It will most likely be a combination of the second and third sessions.

We are not sure when the recording will be available for distribution. GSI must make the recording accessible with a transcript and captioning before it may be released.

For TTT, will each day touch on something new? WIOA has two days assigned. Will each day have a different agenda?
Yes, each day has its own agenda. The two days allotted for each of the programs cover two days' worth of material, not one day repeated.

Will there be a training data base to utilize for the area trainers to use to train front line staff once we have completed the Train the Trainer sessions?
Yes, a training database will be available for local training. TWC's Training and Development department is sending out information and the training logins to use for the training.

Does the train-the-trainer include TWIST Admin Functions?
No, there is no administrative functions training for WIT Liaisons included in the TTT training. Workforce Automation is developing training for liaisons.

What is the content and how long is the TTT training?
A complete training session for all programs covers 10 days and consists of the following:

- Prerequisite – Basic Navigation for WIT – Online and Self-Paced

****Required for all participants before attending the TTT sessions****

- **Day 1: Cross Program Topics** – demonstrates and discusses the common functions among all the programs with such topics as Case Notes, Ribbons, etc. This class is required for all participants so that they may become familiar with the common functions across all programs. ****Required for all participants****
- **Days 2 – 3: WIOA Program** - demonstrates and discusses Common Intake and functions associated with Adult, Dislocated Worker and Youth processes involved with the WIOA program.
- **Days 4 – 5: SNAP Program** - demonstrates and discusses SNAP Registration and functions associated with the SNAP program.
- **Days 6 – 7: TANF Program** - demonstrates and discusses TANF Registration and functions associated with the SNAP program.
- **Days 8 – 9: Trade Program** - demonstrates and discusses Trade Registration, Petitions and functions associated with the Trade program.
- **Day 10: WFCMS Reports** - demonstrates and discusses Workforce Reports.

What is the schedule for the TTT sessions?
Session 1: September 18-29
Session 2: October 2-13
Session 3: October 16-27
Session 4: October 30-November 10
Session 5: November 27-December 8—designated make-up session
These dates are tentative and may be subject to change.