

SAMPLE COMPREHENSIVE NARRATIVE ENTRIES FOR WORKINTEXAS.COM CASE NOTES

The following scenarios show comprehensive narrative entries—case details and services provided—for WorkInTexas.com Case Notes.

WorkInTexas.com Case Notes narratives must include the following information, as applicable:

- Title: a descriptive subject entry that accurately reflects the contents
- Who: for example, customer’s name, employer’s name
- What: the activity being reported
- When: the date in which the activity was reported
- Where: such as a customer’s work or school location
- Why: for example, to verify or document service activities
- How: for example, the customer called or the case manager called

SCENARIO 1: Workforce Innovation and Opportunity Act Youth in Tutoring

In September, a Workforce Innovation and Opportunity Act (WIOA) youth, Joe Brown, informed the case manager that they were failing math. The case manager located a local businessperson to tutor Joe in math.

Action/Documentation

The case manager entered:

- WorkInTexas.com service code *406–Tutoring/Study Skills Instructions – Youth Funded*; and
- the following comprehensive narrative into WorkInTexas.com Case Notes:
Tutoring. September 15, Joe is failing math with a grade of 62. John Smith, owner of Smith Investments, has agreed to tutor Joe on a weekly basis.

Joe continued to participate in the program and, during the October contact, the case manager asked Joe how the tutoring was going.

Action/Documentation

If Joe was still participating in the tutoring sessions, the case manager would enter:

- WorkInTexas.com service code *406–Tutoring/Study Skills Instructions – Youth Funded* for the October service activity; and
- the following comprehensive narrative into WorkInTexas.com Case Notes:
Tutoring. October 3, Joe is still receiving tutoring services from John Smith and the math grade has improved from 62 to 68, as reported by the math teacher, Peggy Johns.

SCENARIO 2: WIOA Adult Seeking Employment Following Training

Jennifer Williams received WIOA Adult–funded occupational training. In May, Jennifer graduated as a registered nurse and passed the state licensing exam. Jennifer is working with a 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 entered:

- WorkInTexas.com service code *125–Job Search Assistance, incl. Career Counseling* for June 12; and
- the following comprehensive narrative into WorkInTexas.com Case Notes: *Job Search Assistance. Met with Jennifer and provided four job referrals, which were posted in WorkInTexas.com.*

On June 29, Jennifer was not selected for any of the four jobs. The case manager provided Jennifer with six more job referrals that were posted in WorkInTexas.com.

Action/Documentation

The case manager entered:

- WorkInTexas.com service code *125–Job Search/Placement Assistance, incl. Career Counseling* for June 29; and
- the following comprehensive narrative into WorkInTexas.com Case Notes: *Job Search Assistance. On June 29, Jennifer reported that they had not been 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 they are hired or need further assistance.*

On July 9, Jennifer was not selected for 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 entered the following comprehensive narrative into WorkInTexas.com Case Notes:

Mock Interviews Workshop. July 9, Jennifer has engaged in 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 entered WorkInTexas.com service code *262–Job Readiness/Employment Skills*.

SCENARIO 3: Choices—Establishment of Self-Employment

On September 19, Mr. Andrews, a Choices participant, appeared for a scheduled appointment and to discuss starting a business.

During the appointment, the case manager:

- reviewed the documentation requirements (that is, federal tax forms, property title, deed, business accounts, business records, or a business plan) with Mr. Andrews and was provided with at least one of the required documents to verify that Mr. Andrews was establishing a self-employment enterprise;
- reviewed the reporting requirements for income (that is, invoices or copies of checks) and expenses (receipts) for self-employment activity with Mr. Andrews;
- informed Mr. Andrews of the additional services that were available (such as work-related expenses, support services); and
- scheduled the next appointment date.

Action/Documentation

The case manager entered the following comprehensive narrative into WorkInTexas.com Case Notes:

Establishment of Self-Employment. On September 19, Mr. Andrews reported that they are starting a mechanics business. Reviewed self-employment documentation requirements with Mr. Andrews and was provided a business plan. The business is called Andrews Mechanic Services and will be located at 123 Workforce Street, Austin, TX 78701.

Reviewed the reporting requirements for income and expenses for self-employment. Mr. Andrews understood the reporting requirements and had already developed invoices for the business. Mr. Andrews understood that invoices must include all required information. Mr. Andrews understood that requests could be made for work-related expenses for the tools needed to start the business. Next appointment is September 26.

SCENARIO 4: Supplemental Nutrition Assistance Program Employment and Training Retention

On September 19, Mr. Wilson, a Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T) participant, contacted the case manager to report that they had found employment. The case manager subsequently discussed the availability of job retention services, support with transportation, and reported Mr. Wilson's employment to the Texas Health and Human Services Commission (HHSC).

Action/Documentation

The case manager:

- opened WorkInTexas.com service code *600–Unsubsidized Employment/Employment Entry*;

- entered WorkInTexas.com service code *181–Support Service - Transportation Assistance* for September 19;
- entered reconsideration for employment in WorkInTexas.com under Good Cause tab;
- completed and faxed the HHSC Form H1817 to HHSC and placed a copy in Mr. Wilson’s case file; and
- entered the following comprehensive narrative into WorkInTexas.com Case Notes:

Employment and Job Retention Services. On September 19, Mr. Wilson reported that they had obtained a job with the Austin Independent School District. The job is full-time—40 hours per week. The HHSC Form H1817 was completed and faxed to HHSC and a copy placed in the case file. Reconsideration was updated in WorkInTexas.com under the Good Cause tab for employment. Service 600 was opened in WorkInTexas.com. Transportation assistance was issued at \$40 to cover the period between September 19 to September 25.

Because a job retention service was provided to Mr. Wilson, the case manager updated WorkInTexas.com Case Notes. All SNAP E&T cases that report full-time employment must remain open.

Action/Documentation

The case manager entered the following comprehensive narrative into WorkInTexas.com Case Notes:

October 5, Job Retention Services Request Date was updated with today’s date because transportation services have been issued.

SCENARIO 5: Trade Adjustment Assistance Benchmark Review and Failure

Under Trade Adjustment Assistance (TAA) regulations, trade-affected workers are required to contact a case manager for a benchmark review to:

- monitor their progress in completing training;
- ensure the maintenance of satisfactory academic standing; and
- determine eligibility for Trade Readjustment Allowances.

Boards must make contact with trade-affected workers on a monthly basis, and benchmark reviews, at a minimum, must be conducted once every 60 days.

On January 15, Ms. Jones, a trade-affected worker, contacted the case manager for a benchmark review after a semester of study.

Action/Documentation

The case manager entered the following comprehensive narrative into WorkInTexas.com Training Benchmark Case Notes:

Benchmark Review & Failure (1st). On January 15, Ms. Jones came into the Workforce Solutions Office for a 30-day benchmark review. Ms. Jones completed a semester (fall 2023) at Texas Community College and provided an unofficial

transcript that showed the following grades and verified full-time enrollment status (12 hrs.) over the course of the semester:

English Lit 3201 - D

Political Science 3101 - C

Intro to Algebra 3101 - D

Art Appreciation 3202 - C

Ms. Jones has been placed on scholastic probation and is in danger of not completing training within the time frame allotted in the approved WorkInTexas.com Training Application. I issued a benchmark failure (1st warning) and advised Ms. Jones to consider using campus tutoring services next semester. Ms. Jones was advised to provide evidence of progress in restoring their academic standing at the next review appointment, or the WorkInTexas.com Training Application will need to be amended to reflect changes that may include an occupational goal adjustment or a recommendation for termination of training. The next benchmark review is scheduled for February 15. Ms. Jones was reminded to register for spring semester courses as stipulated in the IEP supplement, or my approval must be sought to make changes.