




Memorandum of Record #355

DATE: March 4, 2009

MEMORANDUM TO: Workforce Solutions Contractors

FROM: Francisco Moncivais
Deputy Executive Director-Program Operations 

SUBJECT: Technical Assistance Bulletin # 197
Exclusion Reasons and Performance Outcomes (TWIST)

The Texas Workforce Commission (TWC) has released Technical Assistance (TA) Bulletin 197, which provides information on the entering of exclusion reasons into The Workforce Information System of Texas (TWIST) and performance outcomes.

Workforce Solutions-Alamo Contractors must ensure that appropriate staff reviews and applies the appropriate exclusion to participants that meets one of the six reasons. This TA Bulletin should be implemented in accordance to MR 262, WD 27-07 "Integrated Data Collection and Performance Management".

All comments and inquiries pertaining to this policy should be directed to:

Blanca Luna
MIS Administrator
(210) 581-1061
blanca.luna@twc.state.tx.us

Attached: TA Bulletin 197

WORKFORCE DEVELOPMENT DIVISION
Workforce Policy and Service Delivery Branch
Technical Assistance Bulletin 197

Program: **Choices; Performance; TWIST; WIA**

Subject: **Exclusion Reasons and Performance Outcomes**

Date: **March 3, 2009**

This Technical Assistance (TA) Bulletin provides Local Workforce Development Boards (Boards) with information on:

- entering exclusion reasons into The Workforce Information System of Texas (TWIST); and
- performance outcomes.

Occasionally, circumstances arise that justify a participant's exclusion from performance outcomes. Exclusions ensure that Boards are not penalized for circumstances beyond the control of the participant or the program. Participants who meet one of the following six exclusion reasons can be excluded from performance outcomes at any time before the end of the third quarter after the participant exits the program:

- 1 – *Institutionalized*
- 2 – *Health/Medical*
- 3 – *Deceased*
- 4 – *Family Care*
- 5 – *Reservists called to Active Duty*
- 6 – *Relocated to Mandated Residence*

Additionally, applying exclusions is at Boards' discretion. Attachment 1, *Integrated Data Collection and Performance Management Reference*, to WD Letter 27-07, issued August 1, 2007, and entitled "Integrated Data Collection and Performance Management" states "there may be some circumstances in which an exclusion could be applied, but a Board chooses not to apply it."

Entering Exclusion Reasons in TWIST

TWIST has been modified to assist Boards in documenting circumstances based on one of the six allowable exclusion reasons:

- Under the *Exclusions* tab on the *Performance Data* screen, select the appropriate *Exclusion Reason* from the dropdown menu and document the circumstances necessitating the exclusion in the *Justification* field.

[Note: Records containing invalid Social Security numbers (SSNs) or missing SSNs are automatically excluded from all Common Measures performance outcomes.]

- The *Exclusion End Date* (formerly *Planned End Date*) on the *Exclusions Detail* screen automatically populates with a date, 90 days from the *Exclusion Start Date*, except when option 3 – ***Deceased*** is selected.

Performance Outcomes

- When a participant has been given an exclusion and subsequently receives a qualifying service, the exclusion will be invalidated and the participant will remain in performance.
- When an exclusion is applied, a participant will be excluded from all Common Measures performance calculations; TWIST cannot exclude a participant from only one Common Measure.
- Exclusion reasons for Choices participants exclude them from Common Measures performance calculations; however, they will remain in Choices participation.

Please distribute this information to appropriate staff. Direct inquiries regarding this TA Bulletin to wfpolicy.clarifications@twc.state.tx.us.

ATTACHMENT:

Attachment 1: TWIST Performance Data Screen and Exclusion Detail Screen

Performance Data Screen – Exclusions Tab

Customer Information

WDA: [] Customer: []

Customer Search: SSN: [] Name: JOHN DOE
 Last: [] Birth Date: 01-01-1901 Phone: (555)555-5555 Ext: [] TWIST ID: 7777777
 First: []

TWIST ID: [] Search []

Menu Selections:

- ◆ Intake - Common
- ◆ Eligibility
- ◆ Program Detail
- ◆ Assessment
- ◆ Service Tracking
- ◆ Counselor Notes
- ◆ Change SSN
- ◆ TANF History
- ◆ FSE&T History
- ◆ Customer Calendar
- ◆ Performance Data
- ◆ Common Measure

Performance Outcomes | Employment Outcomes | Tax Wages | Last Grade | **Exclusions**

| Exclusion Reason | Exclusion Start Date | Exclusion End Date | Justification |
|------------------|----------------------|--------------------|---------------|
| | | | |

Projected | Participation Start Date | Participation Exit Date | Exclusions Id

Exclusion Detail Screen – Exclusion Reason Dropdown Options and Justification Field

Exclusions Detail

Exclusion Reason: []

Exclusion Start Date: 00/00/0000

Exclusion End Date: 00/00/0000

Office: []

Office 4: []

Office 5: []

Staff: []

Justification: []

First Back Next Last New Delete OK Cancel

1 Of 1