

WorkinTexas.com Cross Program Content Case Management Training Exercise Workbook

Approved by the

Texas Workforce Commission

Training and Development Department



Training and Development Mission

We are here to help TWC and our partners enhance employee workplace skills and productivity through the development, coordination, and delivery of quality learning opportunities.

Texas Workforce Commission

Training and Development Department

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Cross Program Content: Case Management Training

This manual contains the exercises for the WorkinTexas.com Cross Program Content Case Management training class.

You may also use this book as a desk aid to assist you with completing activities at work.

Note: The data, examples, and images in this manual are taken from the training database system and do not contain any Personal Information (PII). Individual, employer, and service provider data are fictitious. The resemblance to any real people or companies is strictly coincidental. As you work through the exercises, do not enter any personal information into the training environment.

Note: In the WIT environment there are multiple ways to complete the same actions. Different choices made for the same actions can lead to different results and/or screens in the software. If you get lost in an exercise, use the browser back button at the top of the page to go back to a familiar step, or you can return to the Dashboard to start over.

Guidance for Using This Workbook

In the exercises:

- Hyperlinks are **bolded** and underlined.
- The term Customer and Individual are used interchangeably.

Staff Functions

The exercises in this manual attempt to simulate the functions that are common across multiple programs, those case management tools and features you will work in regardless of the program(s) to which they apply. The goal of this training is to reduce training content redundancy and increase the focus and training time needed to address program-specific features. To accomplish this goal, all program staff will receive this Cross Program Content training to isolate these common case management features. Because of what this training covers, these topics as they apply to WIT system program trainings will not be covered in detail.

Exercise #1: Login as Staff



Objective: Login as Staff

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: This exercise is to become familiar with how to log in to the WIT environment.

To log in as a staff user type, follow these steps:

1. Access the Home page according to the trainer's directions.
2. Click **Sign In / Register**.
3. Enter Username.
4. Enter Password.
5. Select **I'm not a Robot** checkbox for reCAPTCHA, if applicable.
6. Click **Sign In**.
7. Review Staff Sign-in Notice text.
8. Click **I agree**.

Exercise #2: Pin Links on My Staff Dashboard



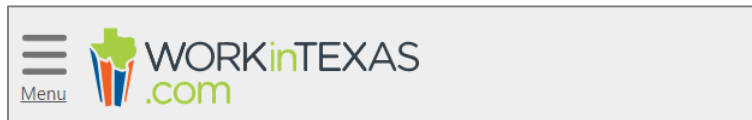
Objective: Create shortcuts to popular staff commands.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and accessed My Staff Dashboard.

Purpose: This exercise will help you work more efficiently in the WIT system.

To set the Create Individual pinned link:

1. Access the left navigation menu by selecting the **Menu** link.



Tribar / Menu Link

2. Select **Manage Individuals > Create an Individual**.
3. Select the push pin displayed in the top left corner of the screen.
4. Select **Dashboard** from the top menu bar to return.
5. Do you see this pinned link displayed?

To set the Assist an Individual pinned link:

1. Access the left navigation menu.
2. Select **Manage Individuals > Assist an Individual**.

3. Select the push pin displayed in the top left corner of the screen.
4. Select **Dashboard** from the top menu bar to return.
5. Now you should have two pinned links. Moving forward, you may select either pinned link instead of accessing each command from the left navigation menu.

Note: Staff account logins will be reused throughout pre-deployment training. If these links already exist, that's OK. Now you have practice and know how to pin additional links as desired.

Exercise #3: Configure Dashboard Widgets Display



Objective: Set a preferred display for your dashboard widgets.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and accessed My Staff Dashboard.

Purpose: This exercise will help you work more efficiently in the WIT system.

To configure the display of your dashboard widgets:

1. Select the Configure Dashboard Widgets link.
2. Select the **Check All** link.
3. Select **Save**. All available widgets should be displayed.

Note: Staff account logins will be reused throughout pre-deployment training. If staff dashboard widgets already display, that's OK. Now you have practice turning on/off their display.

Exercise #4: Configure Dashboard Widgets Location



Objective: Set a preferred location for your dashboard widgets.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and accessed My Staff Dashboard.

Purpose: This exercise will help you work more efficiently in the WIT system.

To configure the location of your dashboard widgets:

1. Locate a desired widget.
2. Select and hold the top right corner of the widget.
3. Drag the widget to a different location within columns 1, 2 or 3, according to the **placement line** displayed.
4. Release the widget.

Exercise #5: Set Preferences within My Staff Account



Objective: Establish desired settings to control system behavior.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and accessed My Staff Dashboard.

Purpose: This exercise will help you work more efficiently in the WIT system.

To set preferences within My Staff Account:

1. Select **My Staff Account** from the top of My Staff Dashboard.
2. Locate the Preferences section.
3. For the Assist Individual Landing Page setting, select **Case Management – Programs Tab**.
4. For the Display # of Most recently assisted individuals and employers setting, select **20**.
5. For the Display new registrants in the most recently assisted individual and employer links: field, select **Yes**.
6. For the Summary Landing Page setting, select the following:
 - i. Personal Profile – **General Information Tab**
 - ii. General Profile – **Case Notes Tab**
 - iii. Case Management – **Programs Tab**
 - iv. Case Management – **Plan Tab**

Summary Landing Page:	<input checked="" type="checkbox"/> Personal Profile - General Information Tab	<input type="checkbox"/> General Profile - Summary Tab
	<input type="checkbox"/> Personal Profile - Background Tab	<input checked="" type="checkbox"/> General Profile - Case Notes Tab
	<input type="checkbox"/> Personal Profile - Activities Tab	<input type="checkbox"/> General Profile - Activities (Staff) Tab
	<input type="checkbox"/> General Profile - Add Single WP Service Tab	<input type="checkbox"/> General Profile - Add Multiple WP Services Tab
	<input type="checkbox"/> Employment Plan - Job Applications Tab	<input type="checkbox"/> General Profile - Documents (Staff) Tab
	<input checked="" type="checkbox"/> Case Management - Programs Tab	<input type="checkbox"/> Employment Plan - Online Applications Tab
	<input checked="" type="checkbox"/> Case Management - Plan Tab	<input type="checkbox"/> Employment Plan - Virtual Recruiter Tab
	<input type="checkbox"/> Case Management - Assessments Tab	<input type="checkbox"/> Employment Plan - Employment Strategy Tab
	<input type="checkbox"/> Case Management - Case Summary Tab	

Summary Landing Page Options

7. For the Detail Landing Page setting, select the same checkboxes as the Summary Landing Page setting.
8. In the Staff Signature section, select **Capture Signature**.
9. Hold down the left mouse button and draw your signature, releasing the left mouse button to set spaces.
10. (Optional) select **Remove My Signature** if you want to retry and repeat Step 9.
11. Select **Update Account**.

Exercise #6: Perform Individual System Registration



Objective: Create a fictitious individual for the purpose of conducting cross program content training.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and accessed My Staff Dashboard.

Purpose: This exercise is necessary to create a client profile for staff to practice managing case management tools and features in WIT.

To create an individual account:


1. Select the **Create an Individual** link from the left navigation menu under the Services for Workforce Staff > Manage Individuals menu.
2. In the Login Information section, enter a fictitious individual's username. **Make up this information** according to the business rules displayed in blue text and write down the information for future use.
3. Enter password, **Trainingpassword@1**.

Choose the security question and enter **123** as the response.


Login Information ?


* User Name:


Enter User Name (3 - 20 characters, and must include characters, letters or numbers. Allowable characters are + @ . _).

* Password: 

Strong!
Enter Password (8 - 20 characters, and must include at least one uppercase letter, one lowercase letter, one number and one special character. Allowable characters are # @ \$ % ^ . ! * _ +).

* Confirm Password: 

* Security Question: 

* Security Question Response: 

Special characters are not allowed.

Login Information Section of Create Individual Account Process

4. In the Name section, enter the individual's first and last name **(make one up)**.

Name	
* First Name:	Jacob
Middle Initial:	
* Last Name:	Schneider

Name Section of Create Individual Account Process

5. In the Social Security Number section, select the **I do not wish to provide my Social Security Number** checkbox.

Social Security Number	
<input type="checkbox"/>	I do not wish to provide my Social Security Number
Do not enter dashes (for example, 999001111)	
Social Security Number (SSN):
Re-enter Social Security Number:

Social Security Number Section

6. In the Phone Number section, enter the individual's primary phone number (**make one up**).
7. In the E-mail Address section, enter the individual's primary email address and re-enter it in the Confirmation text box (**make one up**).

E-mail Address

* **Primary E-mail:**

[Create E-mail Account](#)

[Read Our E-mail Security Policy](#)

* **Confirm Primary E-mail Address:**

Email Address Section of Create Individual Account Process

8. In the Primary Location Information section, select the individual’s country of residence, **United States**, and select whether they are authorized to work in the U.S. **Yes**.

Primary Location Information

* **Country:**

* **Are you authorized to work in the United States?** Yes No

Primary Location Information Section

9. In the Residential Address section, select whether the individual is homeless **No**. Enter their address **make one up using local ZIP Code**. If the individual’s mailing address differs, select the checkbox, and enter the individual’s mailing address in the fields displayed.
10. In the Demographic Information section, enter the individual’s date of birth, **01/01/1994**. Select their gender, **your choice**. Select their Foster Care status, **No**.

Demographic Information

*** Date of Birth:** (MM/DD/YYYY)
You indicated your date of birth as August 1, 1988.

Age: 34

*** Gender:** Female Male I do not wish to answer.

I am currently in Foster Care or I have aged out of Foster Care System Yes, Currently in Foster Care
 Yes, I have aged out of the Foster Care System
 No

Demographic Information Section

Note: When you click outside of the Date of Birth field, the system will calculate the person’s age.

11. In the Citizenship section, indicate the individual’s citizenship status, **Citizen of U.S., or U.S. Territory.**
12. In the Disability section, select **No.**
13. In the Education Information section, select the individual’s highest education achievement level, **High School Diploma**, and their current school status, **No, not attending any school.**

Education Information

*** Your Highest Education Level Achieved:**

*** Are you attending school?**

Education Information Section of Create Individual Account Process

14. In the Spouse or Caregiver of a Military Member section, provide responses for the questions displayed, **No**.


Spouse or Caregiver of a Military Member

* Are you the spouse of a member of the armed forces who is on active duty? Yes No

* Are you a spouse or family caregiver to a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit? Yes No

* Are you the spouse of a veteran who has a permanent, total service connected disability or had the disability at the time of death, or died while the disability was in existence?
OR
A spouse of a service member on active duty who died or has been Missing In Action (MIA), captured in the line of duty or forcibly detained for a total of more than 90 days? Yes No

Military Service



* Are you currently in the U.S. Military or a Veteran? Yes No

Spouse or Caregiver of a Military Member Section

15. In the Military Services section, provide responses to each question, **No**.
16. In the Job Title section, enter the individuals preferred job title, **Fry Cook**. As you type, suggested matches will display, from which you may select a title, **Fry Cook**.

Job Title

Please enter a job title below for this employment history. As you are entering the job title, you may see a list of common job titles similar to what you are entering. If you see your job title in the list, select it.

* Job title:

Fry Cook

Job Title Section of Create Individual Account Process

17. In the Job Occupation section, select **Cooks, Fast Food**.

Occupation

Please select the occupation that best matches your job title. You may either select from the Suggested Occupations drop-down list, which is populated based on the job title above, or you can search for an occupation using the search link.

Suggested occupation(s):

None Selected

None Selected

Cooks, Fast Food

Cooks, Restaurant

Job Occupation Section of Create Individual Account Process

Note: If the system recognizes the job title you entered, it will display suggested occupations for selection from the O*NET database. If the system cannot recognize the job title you entered, select the **Search for an Occupation** link to select the best matching occupation code. As a result, the system will display in bold text the matching occupation title and code.

18. In the Ethnic Origin section, select whether the individual is of Hispanic or Latino heritage (**your choice**).
19. In the Race section, select all races that apply (**your choice**).
20. In the Language section, select **No**.

Language

Do you have limited proficiency in speaking, writing, reading, or understanding English?
or
Do you have difficulty in speaking, writing, reading, or understanding English?

Yes
 No

Save **Cancel**

Language Section

21. Click the **Save** button to complete the registration.

Exercise #7: Complete Wagner-Peyser (WP) Program Application



Objective: Perform data entry to determine individual's eligibility to receive WP program services.

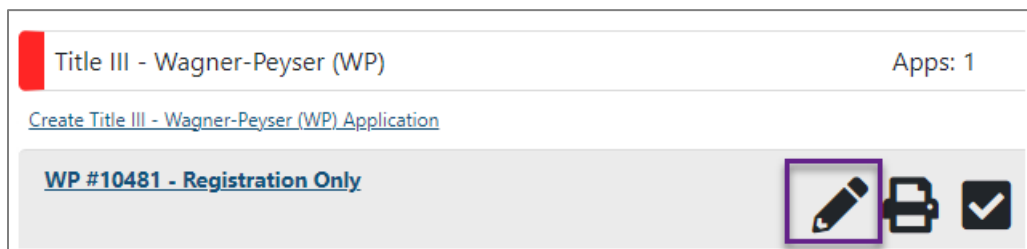
Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and are currently managing the fictitious individual.

Purpose: This exercise is necessary for staff to practice program registration and navigating/managing the WIT functions and features.

To complete the WP program application:

1. Assist the individual whose account profile you just created.
2. Click their name hyperlink next to Currently Managing displayed at the top of the screen.
3. In the folder tree area at the top of the page, click **Staff Profiles > Case Management Profile > Programs.**

Scroll down to the Wagner-Peyser (WP) program section.



Wagner-Peyser Program Area on the Programs Tab Screen

- Click the pencil icon as shown above. This will launch the **Edit Wizard**, which helps guide staff as they perform data entry.

Intro Page

Wagner Peyser (WP) ?

Application is Closed Never Enrolled

Case Application ID: 10718

* Application Date: [Today](#)

Registered Individual Date: [Today](#)

Wagner-Peyser Eligibility Date: [Today](#)

Jobs for Veterans State Grant Eligibility Date: [Today](#)

Employment Service Migrant Seasonal Farmworker Eligibility Date: [Today](#)

* LWDB/Region:

* Office Location:

* Office Location of Responsibility:

WP Application Wizard – Intro Page


To complete the Intro page:

- Maintain today’s date for the Application Date field and Registered Individual Date field.
- Select the **Today** link for the Wagner-Peyser Eligibility Date, Jobs for Veterans State Grant Eligibility Date, and Employment Service Migrant Seasonal Farmworker Eligibility Date fields.
- Confirm the LWDB, Office Location, and Office Location of Responsibility default selections are correct. Adjust the selections if needed.

4. Click the **Next** button to save the data and proceed to the Contact page.

Contact Page

Contact Information




* First Name:

Middle Initial:

* Last Name (including suffix e.g. Jr., Sr., PhD, etc.):

Preferred Name:

* Social Security Number:
[Edit SSN](#) 

WP Application Wizard –Contact Page

To complete the Contact page:

1. Confirm First Name and Last Name fields, as appropriate.
2. Confirm the Social Security Number.


Note: This will appear as a pseudo number in the training environment.

3. Confirm and modify the Residential Address information, as appropriate.
4. Select the Preferred Method of Contact, **Internal Message**.
5. Confirm and modify the Mailing Address information, as appropriate.

6. Confirm and modify the customer's Phone Information, as appropriate.
7. Select the Primary Phone type, **Cell/Mobile phone**.
8. Confirm or enter the customer's email address.
9. (Optional) Select the **Add New Contact** link to create record(s) for contact persons known to the applicant. Minimally, make up information for Contact Name, Phone Number, and Relationship fields.
10. Click **Save** to modify the Alternate Contact information.
11. Click the **Next** button to save the data and advance to the Demographic page.

Demographic Page

Demographic Information



* **Date of Birth:** [Edit Date Of Birth](#)

Today's Age: 28

WP Eligibility Age (at earliest eligibility): 28

* **Gender:**
 Female Male Did not self-identify

* **Authorized to work in the U.S.** Yes No

* **U.S. Citizenship Status:**

* **Hispanic/Latino Heritage:** Yes No I do not wish to answer

* **Race (Ethnicity) check all that apply:**
 African American/Black
 American Indian/Alaskan Native
 Asian
 Hawaiian/Other Pacific Islander
 White
 I do not wish to answer.

* **Considered to have a disability:** Yes No I do not wish to answer

WP Application Wizard – Demographic Page

To complete the Demographic page:

1. Confirm the customer's Date of Birth.
2. Confirm and modify prefilled fields, as appropriate.
3. Click the **Next** button to save the data and advance to the next page.

Veteran Page

Spouse or Caregiver of a Military Member	
Are you the spouse of a member of the armed forces who is on active duty?	<input type="radio"/> Yes <input checked="" type="radio"/> No
* Are you a spouse or family caregiver to a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit?	<input type="radio"/> Yes <input checked="" type="radio"/> No
* Are you the spouse of a veteran who has a permanent, total service connected disability or had the disability at the time of death, or died while the disability was in existence? OR A spouse of a service member on active duty who died or has been Missing In Action (MIA), captured in the line of duty or forcibly detained for a total of more than 90 days?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Military Service	
* Are you currently in the U.S. Military or a Veteran?	<input type="radio"/> Yes <input checked="" type="radio"/> No

WP Application Wizard – Veteran Page

To complete the Veteran page:

1. Verify **No** responses for each item.
2. Click the **Next** button to proceed.

Employment Page

Employment Information

Information entered on this screen is related to the specific individual only.

* **Employment Status:**

Unemployed

* **Not in the labor force:** Yes No
Those who are not actively looking for work, including those incarcerated.

* **Never worked and actively looking for work:** Yes No
(Including youth or displaced homemaker if never employed):

* **In a Registered Apprenticeship Program?** Yes No Did Not Disclose

WP Application Wizard – Employment Page

To complete the Employment page:

1. Select **Unemployed** for Employment Status.
2. Select/maintain **No** for not in the labor force.
3. Select **No** for Never worked and actively looking for work.
4. Select **No** for In a Registered Apprenticeship Program.
5. Select **Yes** for Unemployed due to layoff or termination.
6. Select **Today** for Actual Layoff date.
7. Enter **16** for Tenure with employer.
8. Select **No** for Attended a Rapid Response Orientation.

Individual Employment History Section

Note: If the individual's employment history is already documented, staff may click the [**View Background Summary**](#) link for assistance.

9. (Optional) Select the [**Add Employment History**](#) link.
10. Enter **Burger King** in the Employer Name field, select any match that displays.
11. Enter **Fry Cook** as the Job Title and select the match that displays.
12. Select **Cooks, Fast Food** from the list box.
13. Enter **Regular** for Type of employment.
14. Enter **Full Time (30 hours or more)** in the Full or part-time field.
15. Enter **04/08/2022** in the Date you began work field.
16. Select **Resigned/Quit** for Reason for Separation.
17. Enter today's date for Last Day Worked.
18. Select the [**Insert Occupation Description**](#) link to identify job duties; choose the **Summary Description** radio button and click **Submit**.
19. Click **Save**.
20. When prompted, select **OK** for each notification displayed.
21. Click the **Next** button to proceed.

Farmworker Page

Farmworker Information

Information entered on this screen is related to the specific individual only.

* Eligible Migrant Seasonal Farmworker Status:

* Have you worked as a farmworker in the last 12 months? Yes No

Farmworker Page

To complete the Farmworker page:

1. Maintain **No** responses for each item.
2. Select **Next** to proceed.

Education Page

Education Information

Information entered on this screen is related to the specific individual only.

* Highest school grade completed:

* High school diploma or equivalent received: Yes No

* Highest education level completed:

State's compulsory age: 18

The School Status prompt below may be system-set or selections may be limited based on responses to questions above.

* School Status:

WP Application Wizard - Education Page

To complete the Education page:

1. Select/maintain **12th Grade Completed** for the Highest school grade completed by the individual.
2. Select **Yes** for High School diploma or equivalent received.
3. Select/maintain **Attained secondary school diploma** for the Highest education level completed.
4. Select/maintain **Not attending school; secondary school graduate or has a recognized equivalent** for School status.

Education Partner Services Section

5. Select **No** for each item.

Individual Education History Section

Note: If the individual's education history is already documented, staff may click the **View Background Summary** link for assistance.

6. Select the **Add Education History** link.
7. Select **High School Diploma** for Qualification Level.
8. Enter a school name such as **Whitmore High School** for Issuing Institution.
9. Select **No** for Are you currently attending this school.
10. Select **Save**.
11. Click the **Next** button to save the data and advance to the Public Assistance page.

Public Assistance Page

Public Assistance Information

Individual or member of a family that is receiving, or in the past 6 months has received, the following:

* Temporary Assistance for Needy Families (TANF) recipient: Yes No

TANF Recipient Type: Applicant Family Member Not Applicable/Unknown

* Supplemental Security Income (SSI) recipient: Yes No

SSI Recipient Type: Applicant Family Member Not Applicable/Unknown

* General Assistance (GA) recipient: Yes No

GA Recipient Type: Applicant Family Member Not Applicable/Unknown

* Supplemental Nutrition Assistance Program (SNAP) recipient: Yes No

SNAP Recipient Type: Applicant Family Member Not Applicable/Unknown

* Refugee Cash Assistance (RCA) recipient: Yes No

RCA Recipient Type: Applicant Family Member Not Applicable/Unknown

WP Application Wizard – Public Assistance Information Page

To complete the Public Assistance page:

1. Select **No** for each item.
2. Click the **Next** button to save the data and advance to the Barriers page.

Individual Barriers Page

Individual Barriers

Information entered on this screen is related to the specific individual only.

* English Language Learner: Yes No

* Basic Skills Deficient/Low Levels of Literacy: Yes No

* Homeless: Yes No

Runaway: Yes No

Foster Care Status: Yes, Currently In Yes, Aged Out No

* Ex-Offender: Yes No Did not self-identify

WP Application Wizard – Individual Barriers Page

To complete the Barriers page:

1. Select **No** for English Language Learner.
2. Select/maintain **No** responses for the remaining items in this section.

Barriers to Employment Section

3. Select/maintain **No** responses for the remaining items in this section.
4. Click the **Next** button to save the data and advance to the Miscellaneous page.

Miscellaneous Page

Miscellaneous Information

Special Project/Indicator 1:	None Selected
Special Project/Indicator 2:	None Selected
Special Project/Indicator 3:	None Selected
Special Project/Indicator 4:	None Selected
Special Project/Indicator 5:	None Selected

- None Selected
- Adult Education
- Job Corps
- National Farmworker Job Program
- Rapid Response
- RESEA
- Vocational Education
- Vocational Rehabilitation
- VR&E Vocational Rehabilitation & Employment
- YouthBuild


WP Application Wizard – Miscellaneous Page

To complete the Miscellaneous page:

1. Leave all responses at **None Selected**.
2. Select the **Next** button to save the data and advance to the Eligibility Summary page.

Eligibility Summary Page

Wagner-Peyser (WP) Eligibility Information



* Meets definition of Low Income: Yes No

[Income Table](#)

Wagner-Peyser Eligibility: Yes

Reason(s) not eligible for Wagner-Peyser:

Registered Individual Eligibility: Yes

Reason(s) not eligible for Registered Individual:

Jobs for Veterans Grant (JVSG) Eligibility: No

Reason(s) not eligible for JVSG:

WP Application Wizard –Applicant Eligibility Page Excerpt

To complete the Eligibility Summary page:

1. Select **Assign Me** (if you are not automatically assigned) to select yourself as the WP case manager.
2. In the Remote Signature section, go to Exercise #8 and #9.
3. Select the **Finish** button.
4. When prompted, select the option to return to the **Programs tab** screen.

Finish Title III - Wagner-Peyser (WP)
The Title III - Wagner-Peyser (WP) has been successfully saved. Please select below where you want to go next.
Return to Programs Tab
<u>WP #10718 - Participation</u> App Date: 08/28/2023 LWDB: 14 - Capital Area WF Board

Return to Program Tab Prompt

Exercise #8: Capture a Client Signature In-Person



Objective: Capture a Signature **in-context** for an individual.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site**.

Purpose: Learn how to capture signatures in-person while completing applications, plans, or other forms for clients.

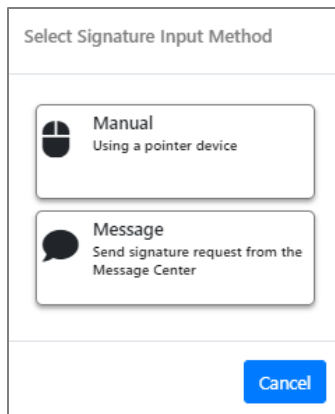
To capture a signature for an individual in-person:

1. Assist the desired individual and navigate to the WP application on their Programs tab of the Case Management Profile.
2. Select the **Eligibility Summary** link, scroll down to the Remote Signature section.
3. To include an Applicant (or Staff Signature), click the **Capture Signature** link for the desired person (see figure below).

A screenshot of a web interface titled "Remote Signature". It contains two rows of text: "Applicant Signature:" and "Staff Signature:". To the right of each row is a "Capture Signature" link with a small signature icon. A red rectangular box highlights both "Capture Signature" links.

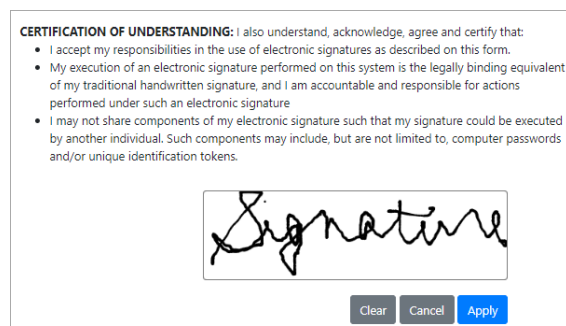
Remote Signature Panel

A pop-up window displays, where you select how the signature will be obtained (see figure below).



Signature Input Method Pop-up Window

4. For parties present in-person, click the **Manual** option. A signature capture window displays (see figure below).



Signature Capture Window

Note: For remote parties, staff selects **Message** to send the customer a system message to provide their signature the same way staff provides their signature using the mouse.

5. Read the Certification of Understanding statements, and then use the mouse (or stylus or finger on any touchscreen device) to hand-write the signature. Click **Apply** to save it and return to the form page. The signature displays on the page.

Exercise #9: Client Provides a Remote

Note: The customer performs these steps, not the staff user.



Objective: Fulfill a Request to provide a remote signature from an individual when they are not in-person.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site**.

Purpose: See how an individual sends their signature remotely working from a system message request.

To retrieve a remote client signature from the Message Center:

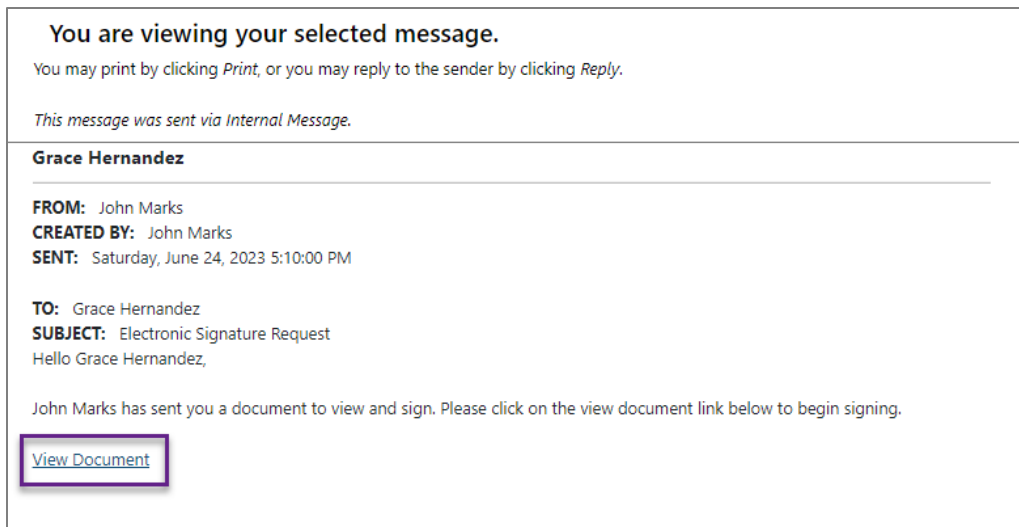
1. Log in to the WIT system as the individual.
2. Access the system's Message Center and locate the Electronic Signature Request message (see figure below).

Viewed Status	Attachments	From	Subject	Msg Date	Select
<input checked="" type="checkbox"/>		Allyson Guzman	Electronic Signature Request	10/08/2020 12:01 PM	<input type="checkbox"/>
<input checked="" type="checkbox"/>		POSTMASTER	Welcome to Employ Florida	09/28/2020 11:08 AM	<input type="checkbox"/>

Page size: 10 2 items in 1 pages

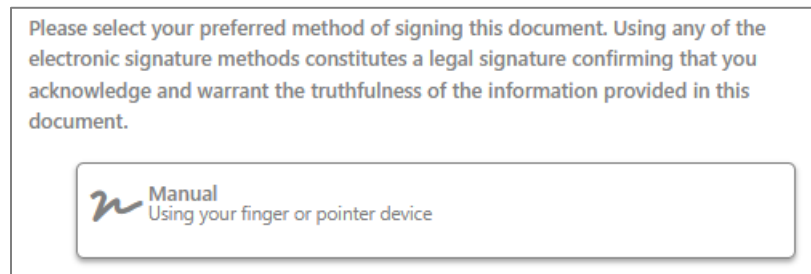
Signature Request Message in Individual's Message Center Inbox

3. Click on the **Electronic Signature Request** subject link to open the message (see figure below).



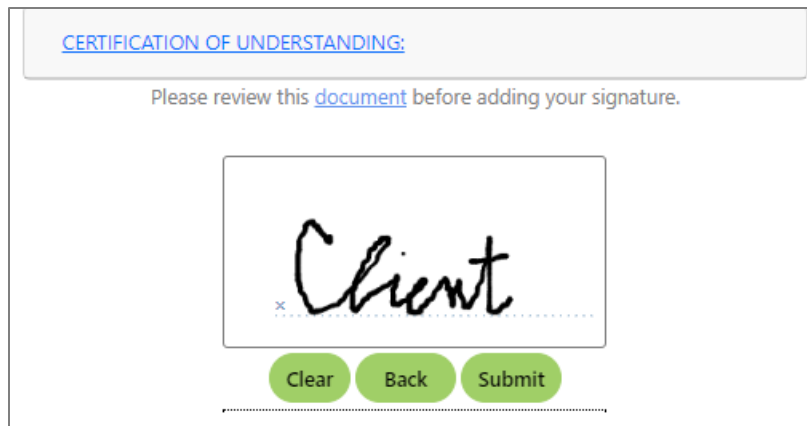
Body of Signature Request Message

4. Click on the **View Document** link in the message (see figure above).



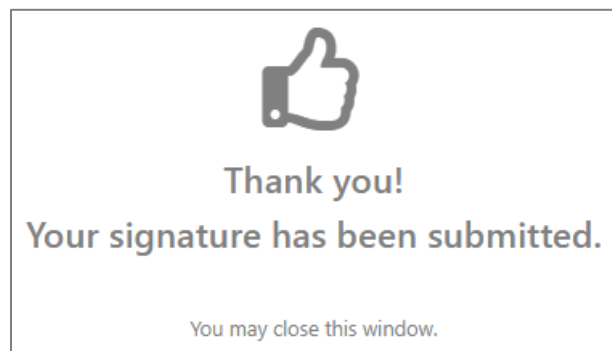
Preferred Signing Method Selection Page

5. Select **Manual** as the preferred signing method.



Mouse (or Stylus or Finger) Method of Signing

6. (Optional) Select the **CERTIFICATE OF UNDERSTANDING** link to view the disclaimer.
7. (Optional) Select the **document** link to view the document for which the signature is required.
8. Use the mouse to write the signature.
9. Click **Submit** to add the signature to the signature form immediately. In response, the system displays the following confirmation:



Remote Signature Confirmation Screen

10. The system will automatically apply the signature to the form.

Exercise #10: Create a Case Note Template



Objective: Create a case note template.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: By creating case note templates, staff may easily create case notes by selecting an existing template. The system will autofill each required field in the new note based on data saved in the template.

To create a case note template:

1. Continue to assist the individual you created.
2. Locate the **Case Notes** tab screen from staff's General Profile.

Note: You can also work from the left navigation menu to select **Case Note Templates** from the Communication Templates group.

3. Select the [View Case Note Templates](#) link.

Individual Case Note Templates Employer Case Note Templates Provider Case Note Templates

Individual Case Note Templates List

Click a column title to sort.

Search:

Template ID	Template Name	Template to be used by	Created By	Action
641	1-Monthly Progress Report	Only staff in the Office/Location specified below	Roleson, Robin	Edit Delete
744	102-Basic Career Srvs	Only staff in the Office/Location specified below	Roleson, Robin	Edit Delete
745	1-Referral Srvs-WIOA	Only staff in the Office/Location specified below	Roleson, Robin	Edit Delete
746	205-Individualized Career Srvs	Only staff in the Office/Location specified below	Roleson, Robin	Edit Delete
8368	0 - WIOA - Adult Application	Only staff in the Office/Location specified below	Klimczak, Judith	Edit Delete

Page 1 of 5301 Rows: 5

Showing 1 to 5 of 26,505 entries

[Create New Template](#)

Individual Case Note Templates List Tab

Note: You can only edit or delete templates that you created.

- Click the **Create New Template** link below the list. The Create New Case Note Template page displays (see figure below). The template type automatically defaults to the user role of the tab you are on.

Template Identifier	
Template ID:	646
* Template Name:	<input type="text" value="WP Eligibility Determination"/>
Template Type:	Individual Template
Template Restriction	
* Template to be used by:	<input type="text" value="Only me"/>
Program:	<input type="text" value="Title III - Wagner-Peyser (WP)"/>
LWIA:	<input type="text" value="Capital Area WF Board"/>
Office:	<input type="text" value="123 WF SOL Capital Area East"/>
Case Note Content	
<input type="checkbox"/> Please check to suppress this Case Note	
Partner Program:	<input type="text" value="None Selected"/>
Subject:	<input type="text" value="Test"/>
Contact Type:	<input type="text" value="Face-to-Face"/>
Case Note Description:	
<small>Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.</small>	
<input type="text" value="The customer has been deemed eligible to receive staff-assisted WP program services."/>	
[Clear Text]	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Create New Case Note Template Page

5. Enter the case note template name, **WP Eligibility Determination**.

Note: You might consider adding your initials and perhaps today's date to locate your template more easily.

6. In the Template Restriction section:

- i. Select by whom the template may be used select, **Only me.**
- ii. (Optional) Select the program to which this case note template belongs **Title III – Wagner-Peyser (WP)**, the LWIA, **Capital Area WF Board** and the Office, **123 WF Capital Area East.**

7. In the Case Note Content section:

(Optional) Check to suppress the case note template. **Note:** This means only staff members with access to case notes for this workforce region, or **super users** may view suppressed case notes. This protects the individual, should confidential or sensitive information be entered.

- i. (Optional) Select the partner program agency to which this case note template applies.
- ii. Select the Subject, **Test.** (add your initials).
- iii. Select the contact type, **Face-to-face.**
- iv. In the Case Note Description section, enter the body of the case note, **The customer has been deemed eligible to receive staff-assisted WP program services.**

8. Click **Save** to save the case note template.

9. Click **Return to Previous Page.**

Exercise #11: Add a New Case Note



Objective: Create a new case note.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: Create a new case note to document case related information about the individual.

To create a case note for an assisted individual:

1. Assist the individual you created.
2. Locate the **Case Notes** link screen from staff's General Profile.
3. Click the **Add New Case Note** link at the top of the individual's Case Notes tab or the **Add New Case Note** button at the bottom. The Add New Case Note page displays (see figure below)
4. (Optional) To add an appointment to the case note, click the **Add Appointment** link. The Add Appointment window displays.
5. Select a case note template from the Autocomplete by Template drop-down list. This will prepopulate some fields. You must complete any of the remaining required fields.
6. In the Case Note Details section, click the box to **Suppress** the case note. (By doing so, only staff members with access to case notes for this workforce region may view suppressed case

notes. This protects the individual, should confidential or sensitive information be entered).

7. Select the **Today** link as the date you contacted the client in the Contact Date field.
8. Select the appropriate LWDB/Region and Office Location.
9. Select the program affiliation for this case note. The individual's application ID(s) for the selected program become available in a drop-down list.
10. Select the appropriate application ID from the App ID drop-down list.
11. (Optional) To send an internal message to the client based on a case note, you can use the **Create Message From Case Note on Save** option in the Message Options section. After saving the note, you can select the desired **Delivery Method** (see figure below). Please note that the Internal Message will always be included as one of the delivery methods.

Message Options

Create Message From Case Note on Save

Delivery Method

* Select Method: Internal Message (Message Center)
 Email (If Available)
 Text Message (If Available)
 Text Message Notification (If Available)

Use Recipient's Preferred Notification Method

Request Read Receipt: Yes No

You will also receive an email notification if you select Text Message or Text Message Notification

Case Note Attachment(s)

Listed below are the documents associated with this case note. Click the View link below to view that particular item.

Results View: [Summary](#) | [Detailed](#)
Click a column title to sort. View Thumbnails

[[Top](#) | [Filter Criteria](#) | [Bottom](#)]

Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. These spaces will be replaced with _ when saving the document in our system.
[Top](#) | [Filter Criteria](#) | [Bottom](#)]

[[Add a Document](#) | [Scan a Document](#)]

[Supported File Format](#)

Document 1: No file chosen

Add New Case Note Page – Message and Attachments Sections

12. (Optional) In the **Case Note Attachment(s)** section, you have the option to attach any relevant documents to be associated with the case note. To do this, click either the **Add a Document** or **Scan a Document** link. If you choose to upload a document, the page will refresh with controls to upload a file (see figure above). If you choose to scan a document, a separate pop-up window will appear.
13. Click **Save** to save the case note.

Exercise #12: Complete WP Participation Form





Objective: Enter the date of program participation for the WP program applicant.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#), you completed the WP program application form, and you chose to access the WP Participation form.

Purpose: This exercise meets a system requirement for an individual to receive WP program services.

To complete the WP Participation form:

1. Continue to manage the individual you created.
2. Access the **Programs** link of the Case Management Profile.
3. Select the **plus sign**  **icon** to open and expand the WP program ribbons.
4. Select the **Participation** ribbon to open and expand its contents.
5. Select the **Create Participation** link.

General Information	
Username:	JimmyJ123
User ID:	12521
State ID:	1991
Last 4 of SSN:	0858
Individual has not provided a valid SSN.	
Name:	Jimmy Jones
Date of Birth:	10/15/1994
Application Date:	08/28/2023
Participation Information	
* Participation Date:	<input type="text" value="08/28/2023"/> (mm/dd/yyyy)  Today
Participation Age:	28

WP Participation Form

6. Enter the Participation Date by selecting the **Today** link.
7. Select **Next** to save the data entry and proceed to the Create Enrollment screen.

Note: For support information, see the next exercise.

Exercise #13: Create WP Enrollment Record 1



Objective: Perform data entry to record the delivery of a WP program service.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and completed the WP Participation form.

Purpose: This exercise helps participants practice documenting the delivery of WP program services and is required to utilize program components on the training agenda.

To complete a WP service enrollment record:

1. In the Service Plan area, confirm/select the desired Customer Program Group, **Wagner-Peyser**.
2. Select Activity Code **102 – Initial Assessment** from the list displayed.
3. Maintain the Actual Start Date, which is the WP Participation date.
4. Maintain the service provided type (**No Virtual/Online, In-person Only**).
5. Enter **Successful Completion** for the completion code.
6. Confirm/maintain staff's LWDB/Region, Office Location, and Position.
7. Select **Staff**.



8. Select **Save Changes**.

Service Plan

*** Customer Group:**

*** Service/Activity Code:**

Program Application Association:

Scheduled Date:   [Today](#)

Actual Service Date: 8/28/2023

Actual Service Date may not be modified on the first activity.

Service Provided:

*** Completion Code:**

RR Event: [\[RR Search \(Opens in a new window\) \]](#)

*** LWDB / Region:**

*** Office Location:**

*** Position:**

Staff User ID - Created: 30427

Staff User ID - Last Edited: 30427

Create WP Activity / Enrollment / Service Screen

Exercise #14: Staff Assisting Individuals



Objective: Search for individual accounts.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and accessed My Staff Dashboard.

Purpose: This exercise will help you learn different ways to perform a search for an individual.

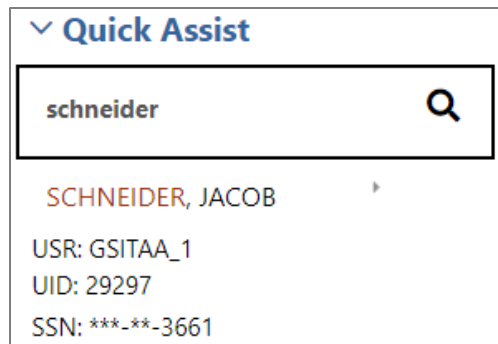
Search Method 1: Quick Assist

1. Select the tribar or **Menu** link on the top left corner of the screen.



Tribar / Menu Link

2. In the Quick Assist field, enter the name of the individual you are searching for. For this example, enter _____ as the last name of the individual. A list of individuals appears below the Quick Assist field.

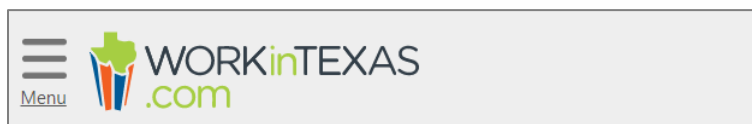


Tribar / Menu Link

3. Select the individual from the list. The individual's account page appears.

Search Method 2: Quick Assist

1. Select the tribar or **Menu** link on the top left corner of the screen.



Tribar / Menu Link

2. From the Services for Workforce Staff section, select the **Manage Individuals** arrow pointing to the right.
3. Select **Assist an individual**. The search page appears.
4. From the Quick Assist section, select the drop-down menu to expand the list of accounts you previously accessed.
5. Select the Individual from the list.
6. Select the **Assist** link, located to right of the list, to run the search. The individual's account page appears.

Quick Assist

You have 2 saved Individual item(s) in [My Search Lists](#).

Here are the 5 most recent individuals you assisted:

Schneider, Jacob (GSITAA_1) ▾ [Assist](#)

Quick Assist Section

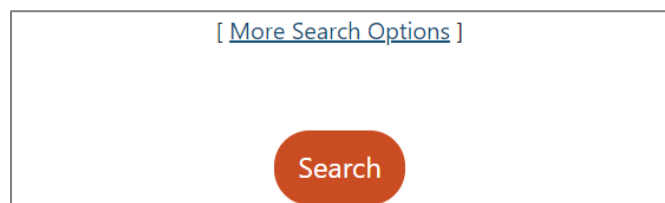
Search Method 3: General Criteria Search

1. Select the tribar or **Menu** link on the top left corner of the screen.



Tribar/Menu Link

2. From the Services for Workforce Staff section, select the **Manage Individuals** arrow pointing to the right.
3. From the General Criteria section, view the various search criteria options available by scrolling down the page.
4. At the bottom of the of the page, select the **More Search Options** link to expand and view additional search options.



More Search Options Link

5. Scroll back up to the top of the General Criteria section. For this exercise, enter:

i. _____ for the First Name field.

ii. _____ for the Last Name field.

6. After entering the search criteria information, select the **Search** link located above and below the General Criteria section. The search results page appears.

<p>Currently Managing SCHNEIDER, JACOB To assist a specific Individual, click on a link in the Action column below.</p> <p>★ Indicates required fields.</p> <p>Results View: Summary Detailed To sort on any column, click a column title.</p>					
<u>User name</u>	<u>First Name</u>	<u>Last Name</u>	<u>SSN</u>	<u>State ID</u>	<u>Last Login Date</u>
GSITAA 1 SNAP - Enrolled 07/14/2023	Jacob	Schneider	3661	10380	

Search Results Page

7. From the Username column of the search results page, select the **Username** link. The individual's account page appears. Keep this account open to continue the next exercise.

Exercise #15: Identify Individual You are Managing



Objective: Identify the individual account you are managing.

Assumption: The individual's account page is already open in the WIT system.

Purpose: This exercise will help you learn different ways to identify the individual's account you are managing in the WIT system.

Method 1: Currently Managing Information at the Top of the Page

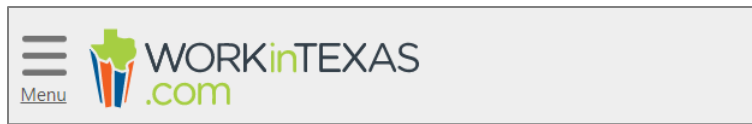
1. View the top of the page, the black bar shows the name of the individual you are currently managing in white letters.
2. View the information below the black bar. This also shows the individual you are currently managing in big blue text.

The screenshot shows the top navigation bar of the WIT system. On the left, there is a 'Menu' icon and the 'WORKinTEXAS.com' logo. The navigation bar contains several icons: a clock for 'Dashboard', a red warning triangle for 'Alerts', a person icon for 'Accessibility', an envelope for 'Mail', a calendar for 'Calendar', a person icon for 'Profile', a house for 'Home', and a right-pointing arrow for 'Sign Out'. Below the navigation bar, a black bar displays 'Currently managing: Schneider, Jacob - Service Tracking: OFF'. Underneath this, the text reads 'Currently Managing [SCHNEIDER, JACOB](#)' in large blue font, followed by 'Use this folder to manage your overall monthly budget and review your income and expenses.' and a smaller instruction: 'Click the button below to calculate and plan your overall budget.'

Currently Managing Information at the Top of the Screen

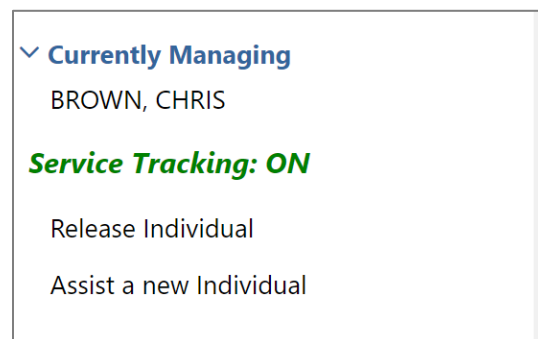
Method 2: Currently Managing from the Left Navigation Menu

1. Select the tribar or **Menu** link on the top left corner of the screen.



Tribar/Menu Link

2. Under the Currently Managing section you can view the individual's name that you are currently managing.



Currently Managing

3. Below the name displays the Service Tracking indicator, which shows that it is turned On or Off. This refers to the tracking and recording of some services and activities automatically without the need for staff to enter them manually. The **automatic service tracking** design helps staff focus more attention on their customers' needs.
4. Below the Service Tracking indicator is a **Release Individual** link. When finished working with an individual, select **Release**

Individual from the **Currently Managing** menu group. Select **Confirm** to finish.

Exercise #16: Program Ribbon Management



Objective: Locate, access, open, and close program ribbons.

Assumption: You have access to a customer account with the necessary program related information to perform this exercise. Your trainer will provide the account for you to access and perform this exercise.

Purpose: This exercise is necessary for all staff that manage programs for individuals.

To create an individual account:

1. Open the customer account in the WIT system.
2. Open the Programs page by selecting the **Programs** link under the **Staff Profiles column > Case Management Profile > Programs**. The Programs page will appear below the Profile folders and the **Programs** link should now be a red color.
3. Scroll down to the WP program and select the **plus sign** **+** **icon** below the Program application ID number to expand the content. The ribbons menu appears.

Note: Each program has ribbons where staff can manage the customer's program requirements. However, the ribbons that appear will depend on the program type. See below images for each program and how the ribbons differ from other programs.

Title III - Wagner-Peyser (WP)
Apps: 1

[Create Title III - Wagner-Peyser \(WP\) Application](#)

WP #10718 - Complete

LWDB:	14 - Capital Area WF Board	Application Date:	08/28/2023
		Participation Date:	08/28/2023
Onestop:	33 - 123 WF SOL Capital Area East	Closure Date:	N/A
Total Activities:	2	Exit Date:	N/A

Case Information

Wagner-Peyser Eligibility Date: 08/28/2023	Registration Only Eligibility Date: 08/28/2023
MSFW Eligibility Date: 06/26/2023 ⓘ	JVSG Eligibility Date: 06/26/2023 ⓘ
Entry Type: Staff Assisted	

Location and Staff

LWDB: 14 - Capital Area WF Board	Onestop: 33 - 123 WF SOL Capital Area East
Create Staff: John Marks (30427)	Edit Staff: John Marks (30427)
Case Manager: John Marks (30427)	Temporary Case Manager: N/A

<input checked="" type="checkbox"/> Participation	08/28/2023
<input checked="" type="checkbox"/> Activities / Enrollments / Services	2
<input checked="" type="checkbox"/> Credentials	0
<input checked="" type="checkbox"/> Add Employment	0
<input checked="" type="checkbox"/> Closure	N/A
<input checked="" type="checkbox"/> Exit / Outcome	N/A
<input checked="" type="checkbox"/> Follow-ups	0

WP Program Ribbons

Title I - Workforce Development (WIOA)
Apps: 1

[Create Title I - Workforce Development \(WIOA\) Application](#)

WIOA #9881 - Case Closed

LWDB:	07 - Northeast Texas WF Board	Application Date:	01/04/2023
Onestop:	9 - 1041 WF SOL NETX P	Participation Date:	01/04/2023
Open/Total Activities:	0 / 2	Closure Date:	02/01/2023
		Exit Date:	N/A

Case Information

ABC Eligibility Date: N/A	Adult Eligibility Date: 01/04/2023
Dislocated Worker Eligibility Date: 01/04/2023	Youth Eligibility Date: N/A
Incumbent Worker Eligibility Date: N/A	

Location and Staff

LWDB: 07 - Northeast Texas WF Board	Onestop: 9 - 1041 WF SOL NETX P
Create Staff: GSI Staff (GSISA0)	Edit Staff: GSI Staff (GSISA0)
Case Manager: 062 Texarkana (4861)	Temporary Case Manager: N/A

Eligibility Summary	
Participation	01/04/2023
Activities / Enrollments / Services	2
Grant Outcome	0
Measurable Skills Gain	0
Educational Functioning Level for Measurable Skills Gain	0
Training Justification	0
Credentials	0
Partner Programs	0
Add Employment	1
Closure	02/01/2023
Exit / Outcome	N/A
Follow-ups	0

WIOA Program Ribbons

SNAP Employment and Training
Apps: 1

[Create SNAP Employment & Training Application](#)

SNAP #9863 - Complete

LWDB:	06 - Dallas WF Board	Application Date:	04/11/2023
Onestop:	229 - 949 WF SOL Dallas Irving	Participation Date:	04/12/2023
Open/Total Activities:	2 / 2	Closure Date:	N/A
		Exit Date:	N/A

Case Information

Case Number: Participation Type: Mandatory - Gen Pop

Location and Staff

LWDB: 06 - Dallas WF Board	Onestop: 229 - 949 WF SOL Dallas Irving
Create Staff: GSI Staff (GSI/SAO)	Edit Staff: GSI Staff (GSI/SAO)
Case Manager: 161 Dallas (4760)	Temporary Case Manager: N/A

HHSC Information	
Benefits Information	
Assessment	3
Communication Letters	
Participation	04/12/2023
Activities / Enrollments / Services	2
Partner Programs	0
Attendance	
Closure	N/A
Appointments	1
Credentials	1
Add Employment	1
Good Cause	3
Sanctions	2
Comprehensive Self-Assessment	
Work Readiness Assessment	1
Exit / Outcome	N/A
Case Transfer	0
Follow-ups	0

SNAP E&T Program Ribbons

Choices (TANF/WTP)
Apps: 1

[Create Welfare Transition Program \(WTP\) Application](#)

WTP #9874 - Complete

LWDB:	01 - Panhandle WF Board	Application Date:	04/18/2023
Onestop:	173 - 601 WF Solutions Panhandle	Participation Date:	03/28/2023
Open/Total Activities:	3 / 3	Case Reopen Date:	N/A
		Closure Date:	N/A
		Exit Date:	N/A

Case Information

Client ID: 123456789	Eligibility Determination Group (EDG) ID: N/A
Case Management Status: N/A	Participant Type: 1 - Mandatory
Eligibility Status: Choices	Two Parent: No
Eligibility Begin Date: N/A	Time Limit Status: 1
Status: N/A	Eligibility End Date: N/A
	Transitional Dates: N/A

Location and Staff

LWDB: 01 - Panhandle WF Board	Onestop: 173 - 601 WF Solutions Panhandle
Create Staff: GSI Staff (GSI5A0)	Edit Staff: Tim Thompson (29274)
Case Manager: Tim Thompson (29274)	Temporary Case Manager: N/A

HHSC Information	
Benefits Information	
Service Needs Assessment	0
Participation	03/28/2023
Work Readiness Assessment	0
Initial Assessment	
Employment Plan	
Activities / Enrollments / Services	3
Attendance	
Credentials	0
Closure	N/A
Partner Programs	0
Household Member Information	
Add Employment	0
Sanctions	5
Form 1836A/B	1
Good Cause	
Case Transfer	0

Choices Program Ribbons

Trade Adjustment Assistance (TAA)
Apps: 1

[Create Trade Adjustment Assistance \(TAA\) Application from Eligible Worker Layoff List](#)

TAA #9865 - Complete

LWDB:	06 - Dallas WF Board	Application Date:	04/11/2023
Onestop:	229 - 949 WF SOL Dallas Irving	Participation Date:	04/11/2023
Open/Total Activities:	1 / 3	Closure Date:	N/A
		Exit Date:	N/A

Case Information

TAA Petition #: 85945
 Planned TAA Training Weeks: 1
 Currently Completed TAA Training Weeks: 1

Location and Staff

LWDB: 06 - Dallas WF Board Create Staff: GSI Staff (GSI/SAO) Case Manager: 105 Dallas (4704)	Onestop: 229 - 949 WF SOL Dallas Irving Edit Staff: GSI Staff (GSI/SAO) Temporary Case Manager: N/A
--	---

Eligibility Summary	
Participation	04/11/2023
Activities / Enrollments / Services	3
Partner Programs	0
Waiver Entry	04/11/2023
TAA/TRA Program Benefit Payments	0
Training Benchmarks	1
Measurable Skills Gain	0
Educational Functioning Level for Measurable Skills Gain	0
Credentials	0
Closure	N/A
Exit / Outcome	N/A
Follow-ups	0
Bona-Fide Application	N/A
Add Employment	0

TAA Program Ribbons

Exercise #17: Multiple Program Enrollment



Objective: Recognize evidence of co-enrollment, identify programs for which co-enrollment may occur.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#)

Purpose: This exercise will help you learn which programs a co-enrollment may occur.

To validate which programs a participant is currently enrolled in:

1. Assist an individual as directed by the instructor (for example, assist **Erica Bruce**).
2. Open the Programs page by selecting the Programs link under the **Staff Profiles column > Case Management Profile > Programs**. The Programs page will appear below the Profile folders and the **Programs** link should now be a red color.
3. Scroll down to two or more programs that are active/open. A sample of a co-enrolled individual follows.

Title III - Wagner-Peyser (WP)
Apps: 1

[Create Title III - Wagner-Peyser \(WP\) Application](#)

WP #10466 - Complete

+

LWDB:	14 - Capital Area WF Board
Onestop:	33 - 123 WF SOL Capital Area East
Total Activities:	2
Application Date	08/05/2023
Participation Date:	08/05/2023
Closure Date:	N/A
Exit Date:	N/A

SNAP Employment and Training
Apps: 0

[Create SNAP Employment & Training Application](#)

Title I - Workforce Development (WIOA)
Apps: 1

[Create Title I - Workforce Development \(WIOA\) Application](#)

WIOA #10467 - Complete

+

LWDB:	14 - Capital Area WF Board
Onestop:	33 - 123 WF SOL Capital Area East
Open/Total Activities:	4 / 4
Application Date	08/05/2023
Participation Date:	08/05/2023
Closure Date:	N/A
Exit Date:	N/A

Client Co-Enrollment in the WP and WIOA Programs

Exercise #18: Perform Case Assignment



Objective: Assign yourself as the case manager for the program participant you created.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: This exercise will help you learn how to fulfill your case assignment duties.

To perform Case Assignment:

1. Continue managing the individual you created.
2. Access the **Programs** link of the Case Management Profile.
3. Select the **pencil icon** for the WP program application to access the Edit Wizard.
4. Access the Eligibility Summary page.
5. In the Current Case Manager section, the system will display your name by default. To practice reassigning the individual to another case manager, select **Assign Case Manager**.
6. Locate Group ID 35 WP Capital Area WF Board and select its **Assign to this Group** link. **Stop here!**

Note: To complete this transaction, select the **Username** link of another group member. However, you will skip this step to maintain yourself as the assigned case manager.

Exercise #19: View Your Case Load



Objective: Confirm those cases currently assigned to you.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and completed the WP program application, minimally.

Purpose: This exercise will help you know your current case volume at any time.

To view your case load:

1. Select **My Staff Dashboard**.
2. Select **My Staff Resources**.
3. Select **Assigned Cases**.

Exercise #20: Uploading a Document



Objective: Upload a client document into the WIT system.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: If an individual provides you with electronic copies of their documents, you can upload these documents to associate them with the customer's account profile.

To upload a document:

1. Find and assist the desired individual, then navigate to their **Documents (Staff)** link of staff's General Profile.

A screenshot of a web application interface. At the top, there are five tabs: 'Summary', 'Case Notes', 'Activities', 'Documents (Staff)', and 'Identity Issues'. The 'Documents (Staff)' tab is highlighted in orange. Below the tabs, the heading 'Documents Available' is followed by a horizontal line. The text below reads: 'Listed below are the documents available on the selected Individual. Click the View link below to view that particular item.' There is a link 'Show Filter Options (Showing all records)'. Below that, it says 'Results View: Summary | Detailed' and 'Click a column title to sort.' To the right, there is a checkbox labeled 'View Thumbnails'. In the center, the text 'No document was found' is displayed. At the bottom, there are four orange buttons: 'Add a Document', 'Scan a Document', 'Link a Document', and 'Complete Online Form'.

Documents (Staff) Link of Staff's General Profile

2. Click the **Add a Document** button. The Upload Documents page displays (see figure below).

Document Association

If you would like to categorize the associated document to a specific program, subcategory, application or verification document, please use the controls in this section to do so.

Program:

Application:

Verification Item:

Verification Type:

Document Information

Document Description:

*** Document Tags:** Do not enter Personal Identifiable Information (PII) into this field.
Keywords that will be indexed with this attachment.

User Accessible: Yes No

Date Received:

Upload Document Screen

3. (Optional) In the Document Association section, select the desired program, application ID number, verification item, and verification type if the document is being used to verify client information.
4. In the Document Information section:
 - i. Select a Document Description, **Birth Certificate**.

- ii. Enter a Document Tag **Birth Certificate**, using any keywords that may help you find this document later. You can enter multiple tags with a semicolon separating each entry.
 - iii. Maintain the **No** default for User Accessible.
 - iv. Leave the Date Received field blank.
 - v. (Optional) Select the checkbox for:
 - 1) Document Expires to enter an expiration date.
 - 2) Medical Document to categorize the document as medical.
 - 3) Sealed Document to categorize the document as sealed.
5. In the Attach Document section:
- i. Click the **Select File** button to open a File Explorer window.
 - ii. Navigate to the desired file location and select the file for upload. The filename displays below the Select File box, along with a Remove button.
 - iii. Repeat step ii for as many additional documents as necessary. The names will be displayed under the text box.
6. Click the **Save** button. The uploaded file(s) will be uploaded to the Documents (Staff) tab screen.

Exercise #21: Scanning a Document



Objective: Scan documents needed for verification.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: If an individual provides hardcopies of supporting documents, staff members with privileges to use a scanner can scan documents to associate them with the customer's account profile.

Note: This exercise is a high-level overview and cannot be performed unless your computer is connected to a scanning device.

To scan a document:

1. Find and assist the desired individual, then navigate to their **Documents** (Staff) link of staff's General Profile.
2. Click the **Scan a Document** button. The Scan Documents page displays (see figure below).

Note: During your first scan attempt, you will be prompted to install the drivers necessary for the computer to communicate with the scan device. Driver installation only occurs initially.

Document Association

If you would like to categorize the associated document to a specific program, subcategory, application or verification document, please use the controls in this section to do so.

Program:

Application:

Verification Item:

Verification Type:

Document Information

Document Description:

*** Document Tags:** Do not enter Personal Identifiable Information (PII) into this field.

Keywords that will be indexed with this attachment.

User Accessible: Yes No

Scan Documents Page before Starting the Scan

3. (Optional) In the Document Association section, select the desired program, application ID number, verification item, and verification type if the document is being used to verify client information.
4. In the Document Information section:
 - i. Select a Document Description **Driver License**.
 - ii. Enter a Document Tag (**Driver License**), using any keywords that may help you find this document later.

You can enter multiple tags with a semicolon separating each entry.

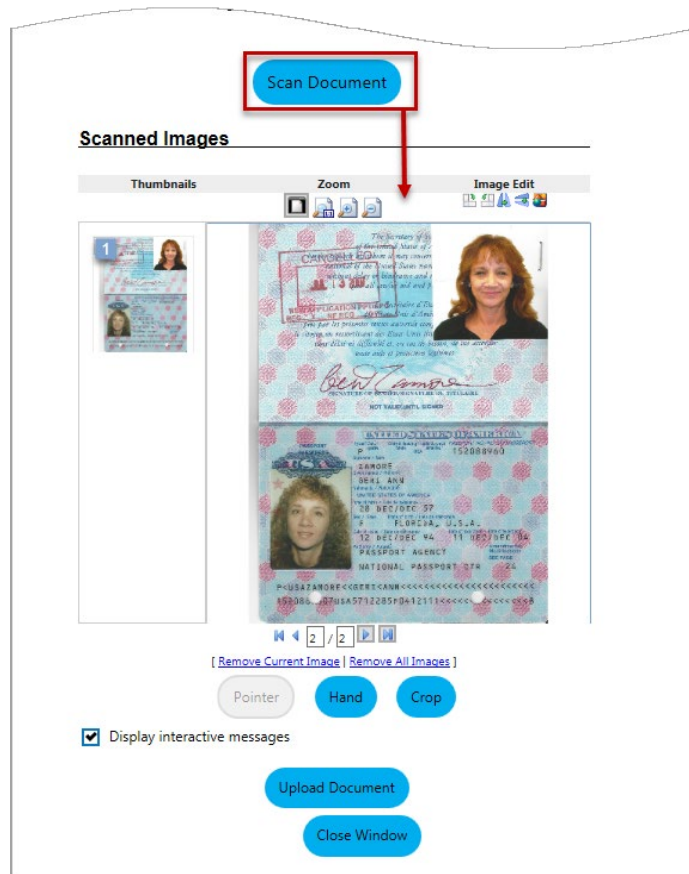
- iii. Maintain the No default for User Accessible.
- iv. Leave the Date Received field blank.
- v. (Optional) Select the checkbox for:
 - 1) Document Expires to enter an expiration date.
 - 2) Medical Document to categorize the document as medical.
 - 3) Sealed Document to categorize the document as sealed.

5. In the Scan Options section:

- i. Use the drop-down list to **Select Source**, if more than one scanner is available.
- ii. Select the **Pixel Type**.
- iii. Select the **Resolution** level.

6. In the **Settings** section:

- i. Select desired checkboxes.
- ii. Ensure that the document is on the scanner. Then click the **Scan Document** button.
- iii. The image and a thumbnail display in the Scanned Images section (see figure below).



Scan Documents Page with Scanned Image

7. In the Scanned Images section:

- i. To adjust the displayed image, use the mouse to define an area on the image and click the **Hand** or **Crop** button.
- ii. Click the **Upload Document** button to add the scanned image to the verification.

8. Click **Save** to upload and save the document.

Exercise #22: Linking a Document



Objective: Link documents that are already in the WIT system to programs that require specific documentation.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: Linking to a previously uploaded or scanned document is a convenient option when reusing a former document, especially when verifying client information **in context**.

To link to an existing document:

1. Find and assist the desired individual, then navigate to their Documents (Staff) tab of staff's General Profile.
2. Click the **Link a Document** button. The Scan Documents page displays (see figure below).

Document Association

If you would like to categorize the associated document to a specific program, subcategory, application or verification document, please use the controls in this section to do so.

Program:

Application:

Verification Item:

Verification Type:

Document Information

Document Description:

*** Document Tags:** Do not enter Personal Identifiable Information (PII) into this field.
 Keywords that will be indexed with this attachment.

Date Received:

Link Document Screen

3. (Optional) In the Document Association section, select the desired program, **Title 1 – Workforce Development (WIOA)**. Unless you are performing in-context verification, you may skip the application ID number, verification item, and verification type fields.

4. In the Document Information section:
 - i. Select a Document Description, **Birth Certificate**.

- ii. Enter a Document Tag, **Birth Certificate**, using any keywords that may help you find this document later. You can enter multiple tags with a semicolon separating each entry.
- iii. Maintain the **No** default for User Accessible.

Note: If you select **Yes**, the document will be displayed in the client's Documents tab screen within the Personal Profile.

- iv. Leave the Date Received field blank.
- v. (Optional) Select the checkbox for:
 - 1) Document Expires to enter an expiration date.
 - 2) Medical Document to categorize the document as medical.
 - 3) Sealed Document to categorize the document as sealed.

5. In the Documents Available section:

- i. Review the documents list to identify the document you want to link to the verification; consider data in the Document Name, Document Tags, and Category fields.
- ii. Review the list for any **matching** flags to identify likely documents for verification (see figures above and below). If flags display, the flags indicate matches to Document Association fields:

Documents Available

Listed below are the documents available on the selected Individual for linking. If you see a document that matches your specified criteria, choose it from the *Select* column below and click the *Link Document* button.

[Show Filter Options \(Showing all records\)](#)

Results View: [Summary](#) | [Detailed](#) View Thumbnails
 Click a column title to sort.

[[Top](#) | [Filter Criteria](#) | [Bottom](#)]

Select	Document Name	Document Tags	Program Name	Category	Modify Date	Expiration Date	Action
<input checked="" type="radio"/>	Birth_Certificate_9-5-11.jpg	Birth Certificate	General - no Program association	General	08/28/2023 07:21		View Review Edit Download Meta Data Delete Mark as Medical

Page 1 of 1 Rows 5

■ This document strongly matches the initial document association information.
■ This document moderately matches the initial document association information.
■ This document loosely matches the initial document association information.

Bottom of Link Document Page from In-Context Link of a Program Application

- iii. Click a radio button in the Select column for the document you want to link to the verification.
6. Click the **Link Document** button.

Exercise #23: Manage Documents on the Documents (Staff) Tab



Objective: Upload or scan a verification or support document for an individual you are assisting

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#)

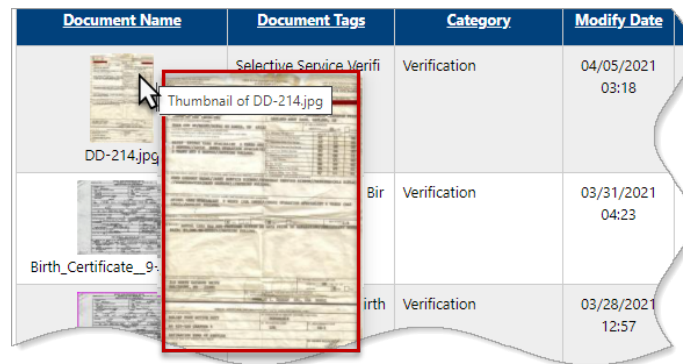
Purpose: Become familiar with the various methods to manage documents in the WIT system.

To access the Documents (Staff) tab:

1. Find and assist the desired individual, then navigate to the Staff Profiles folder.
2. Navigate to the General Profile and click on the **Documents (Staff)** tab. The Documents (Staff) tab displays. You can access multiple options to manage the listed documents, such as viewing documents, adding annotations, editing program associations, adjusting metadata, deleting documents, and uploading or scanning new ones.
3. From the Documents (Staff) tab, you can perform the following actions:
 - i. **View thumbnail images** – Click the **View Thumbnails** checkbox at the top right of the tab to display thumbnails in the Document Name column (see

figure above). If you mouse over a thumbnail, a larger view displays over the thumbnail (see figure below).

Document Name	Document Tags	Category	Modify Date
DD-214.jpg	Selective Service Verifi	Verification	04/05/2021 03:18
Birth_Certificate_90	Bir	Verification	03/31/2021 04:23
	irth	Verification	03/28/2021 12:57



Viewing Thumbnails on Documents (Staff) Tab

- ii. **View a document image** – Click the **View** link in the Action column. A pop-up window displays the attached document. Both staff and individuals can view file types supported for the image tools (like TIFF, PDF, JPG, JPEG, JIFF, GIF, or BMP files).
- iii. **Edit a document image** – Click the **Edit** link in the Action column. The Edit Document page displays with controls for creating annotations and changes to the image.
- iv. **Edit a document's metadata** – Click the **Meta Data** link in the Action column. The Edit Meta data page displays. You can edit Document Information fields, including the document description, name, keyword tags for searches, user accessibility, and the date the document was received, or a date it expires.
- v. **Review a document** – Click the **Review** link in the Action column. The Review Document page displays all

information shown in the Edit Document page, but in view-only mode.

- vi. **Download a document** – Click the **Download** link in the Action column to open a separate window for saving a copy of the document to your local drive.
- vii. **Delete a document** – Click the **Delete** link in the Action column. A pop-up window requires you to confirm the deletion (see figure below). Click OK to remove the document from the Documents (Staff) tab.
- viii. **Upload a document** – Click the **Add a Document** button at the bottom of the page. An Upload Document page displays, from which you can select a document description, add document tags, identify document associations, such as program, application, and verification data, and then locate and upload the document from a local or network location.
- ix. **Scan a document** – Click the **Scan a Document** button at the bottom of the page. A Scan Document page displays, from which you can identify scan options and settings, identify document associations, if desired, select a document description, add document tags, and scan the document. You can then view the scanned image and save it to the Documents (Staff) tab.
- x. **Link a document to a verification** – Click the **Link a Document** button at the bottom of the page. A Link Document page displays, from which you can select document associations fields to link to a document.

Exercise #24: Record a New Credential





Objective: Record a new credential the individual has earned.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: Document a new credential a participant earns related to their program participation.

To create a credential:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign**  **icon** to expand their WP program area.
3. Click the **plus sign**  **icon** to expand the **Credentials** ribbon (see figure below).



Credential Panel and Link

4. Click the **Create Credential** link. The Credential page displays.
5. In the General Information section, select your LWIA/Region and Office Location. The system prefills the other information and displays it as **read only** (see figure below).

General Information

Program: WIOA

Application Number: 164260740

Name: [Redacted]

Application Date: 3/31/2021

Program Participation Date: 3/31/2021

Exit Date: Not Applicable

Maximum date to record after exit: Not Applicable

*** LWIA/Region:**

*** Office Location:**

Credential Page - General Information Section

6. In the Credential Information section, select the Credential Received by the individual **Occupational Skills Certificate or Credential**.
7. If Other, enter the credential name in the Other Credential field.
8. (Optional) For Credential Verification, click the **Verify** link to select a verification document from the displayed list. Click the **Verify** link again to collapse the list.

Note: You can click the **Scan, Upload**, or the **Link** hyperlink to attach a copy of the verifying document.

9. Enter the Date Credential was Received by the individual. To associate the credential to a training activity/service, click the **Search Activities/Services** link. This opens a pop-up list of activities in which the individual is enrolled (see figure below).

Credential Information

* Credential Received:

Other Credential:

Credential Verification: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) | [Print Barcode](#)
 School Records

* Date Credential Received: (mm/dd/yyyy)

Associate to Training/Activity record: 418 – Adult Education (GED) Enrollment – 4910546

Activities List

Activity	Provider	Service/Course	Actual Begin Date	Projected End Date	Actual End Date	Completion Status	Action
418 – Adult Education (GED)	Adult Learning Center	Adult Education (GED)	05/18/2021	12/10/2021	05/19/2021	Successful Completion	Select
414 – Basic Skills Training	CareerSource Central Florida	Basic Skills Training	05/18/2021	09/18/2021	05/19/2021	Successful Completion	Select
413 – Develop Service Strategies (IEP/ISS)	* Pinellas Office Services - General	Office Services - WIOA/TAA	05/17/2021	05/24/2021	05/19/2021	Successful Completion	Select
412 – Objective Assessment	* Pinellas Office Services - General	Office Services - WIOA/TAA	05/14/2021	05/21/2021	05/19/2021	Successful Completion	Select

Credential Page - Credential Information Section and Activities List

- i. Click the **Select** link for the activity to be associated to the credential. The activity displays on the Credential page.

Note: This feature is not available for the WP program.

10. Click **Save**. The Credentials panel redisplay with the credential record shown in a table (see figure below).

[Create Credential](#)

Search:

ID	Program	APPID	Credential	Source/Source ID	Date Received	Staff Entered
843453	WIOA	163215805	High School Diploma	Enrollment – 4910546	05/18/2021	Smith, John

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Credentials Table with Entered Credential Record

Once a Credential record is saved, you can view and edit the credential by clicking the link in the Credential column (see figure above).

Exercise #25: Enter Basic Skills Assessment Results



Objective: Perform data entry to record the outcome of a basic skills assessment.


Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the client's reading, math, and/or language skills must be assessed.

Purpose: This exercise helps participants practice documenting the basic skill assessment outcomes.

To add Basic Skills Assessment test scores:

1. Click the **Basic Skills Assessment** link on the Assessments tab of staff's Case Management Profile.
2. Click **Add Assessment** to create a new assessment record.
3. Select/maintain today's date for the Assessment Date.
4. Select/confirm your LWDA/Board. LWDA determines which tests are available to choose from.
5. Select the drop-down arrow for Reading Test Given and select **Test of Adult Basic Education (TABE)**.
6. Select **Raw Score** for Reading Score Type.
7. Enter **0740** for the Reading Test Result.
8. Enter **7E** for Reading Test Version.
9. Select the affiliated Office from the drop-down list.

10. Click **Save** to save the test scores record.

Basic Skills Assessment	
Individual Name:	Ramsey, Margaret
* Assessment Date:	10/16/2023  Today
* Local Workforce Investment Area/Board:	Capital Area WF Board ▼
Reading Test Given:	Test of Adult Basic Education (TABE) ▼
Specify:	<input type="text"/>
Reading Score Type:	Raw Score ▼
Reading Test Result:	0740 Format: 9999
Reading Test Version:	7E
Math Test Given:	None Selected ▼
Specify:	<input type="text"/>
Math Score Type:	Not Applicable ▼
Math Test Result:	<input type="text"/>
Math Test Version:	<input type="text"/>
Language Test Given:	None Selected ▼
Specify:	<input type="text"/>
Language Score Type:	Not Applicable ▼
Language Test Result:	<input type="text"/>
Language Test Version:	<input type="text"/>
* Customer meets the definition of Basic Literacy Skills deficient:	<input type="radio"/> Yes <input checked="" type="radio"/> No
* Office:	123 WF SOL Capital Area East ▼

Basic Skills Assessment Page

Exercise #26: Create an Objective Assessment Summary (OAS) Form



Note: This is an optional exercise, depending on the needs of training participants. This assessment is also referred to as the Comprehensive Objective Assessment.

Objective: Perform data entry to identify the customer's programmatic needs.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the individual you are managing is a program participant.

Purpose: This exercise helps participants practice documenting a customer's needs and barriers to help form the scope of the Individual Employment Plan (IEP).

Note: The State of Texas refers to this form as the Comprehensive Objective Assessment.

To create an Objective Assessment Summary (OAS):

1. On the **Plan** link of the Case Management Profile, click the **Create Objective Assessment Summary** button. The General page displays (see figure below).

General Information

User Name: CPCUSER4

User ID: 31709

State ID: 11761

* Program: WP

* Application ID: 12033

* LWIA: Capital Area WF Board

* Office: 123 WF SOL Capital Area East

* Assessment Create Date: 10/16/2023
[Today](#)

Attach Active Plan: Yes No

IEP ID # [Redacted]

Objective Assessment Summary Wizard – General Information Page

2. In the General Information section, select the **WP** program.
3. Select/maintain your LWIA and Office affiliation.
4. Select/maintain today's date for the Assessment Create Date.
5. Click **Next** to save your edits and continue to the Expectation page (see figure below).

Program Expectations

* Are you seeking immediate employment Yes No

* What services are you seeking

Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

Education Assistance
Employment Assistance

[Clear Text]

Objective Assessment Wizard – Program Expectations Page

6. In the Program Expectations section:

- i. Indicate whether the individual seeks immediate employment, **Yes**.
- ii. Record desired services in the text box, for example, **Employment Assistance**.

7. In the Employment Expectations section:

- i. Maintain as Occupation 1 the system-set Fry Cook title.
- ii. For Occupation 2, click the **Select Occupation** link.
 - 1) Enter **Computer Programmer** in the Occupation Quick Search tab.
 - 2) Select the **Computer Programmers** link from the matching list of titles displayed.
- iii. Specify desired job attributes, such as employment type **Regular**, full, or part time, **Full Time 30 Hours or**

More, desired salary **\$19.25 or more hourly**, shift preferences, **1st**, benefits needed **Health Insurance**, etc.

- iv. Select **Yes** for Desires Help in Career Planning.
 - v. Select **Yes** for Seeking Training Services.
 - vi. In the Training Preferences box, enter **Computer Programmer training**.
8. Click **Next** to save your edits and continue to the Education page (see figure below).

Education History

Highest Grade Completed High School Diploma

Currently Enrolled in School No, Not Attending Any School

Education History Assessment Summary Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

[Clear Text]

Objective Assessment Wizard – Education Page

9. In the Education History section:
 - i. Select **High School Diploma** for Highest Grade Completed.
 - ii. Select **No, Not Attending School** for Currently Enrolled in School.
10. In the Basic Skills / Education Factors Assessment Summary box, enter Client desires computer programmer training, which is an in-demand occupation.
11. Click **Next** to save your edits and continue to the Degree page.

12. Click **Next** to continue to the Certificate page (see figure below).
13. Click **Next** to continue to the Employment page (see figure below).

Occupational Transferable Skills

?

Summary of Skill Assessment

Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

- i. Use dangerous cooking equipment
- ii. Stock and maintain supplies
- iii. Read and interpret customer orders
- iv. Utilize time management skills
- v. Utilize communication skills

[\[Clear Text \]](#)

Employment History

?

Employer	Start/End Dates	State	Action
Burger King	04/2022 - 08/2023	TX	Edit Delete

[\[Add a New Employment History\]](#)

Objective Assessment Wizard – Employment Page

14. In the **Occupation Transferrable Skills** section, Summary of Skill Assessment box, enter the following:
 - i. Use dangerous cooking equipment.
 - ii. Stock and maintain supplies.
 - iii. Read and interpret customer orders.
 - iv. Utilize time management skills.

- v. Utilize communication skills.
15. In the **Employment History** section, maintain the employer record for Burger King.
 16. Click **Next** to save your edits and continue to the Household & Income page (see figure below).

Household & Income

Information collected on this screen will NOT be included in print form.

Name	Relationship	Age	Income Source	Annualized Income	Action
Jimmy Jones	Self	28	No Income	\$0.00	Edit Delete

[Add a New Household Member](#)

Household & Income Summary Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

Mr. Jones is unemployed at this time.

Objective Assessment Wizard – Household & Income Page

17. Select the **Add a New Household Member** link.
18. Enter/select the following information:
 - i. Enter the first and last name for the WP participant.
 - ii. Enter **28** for the person’s age.
 - iii. Select **Self** from the Relationship field.
 - iv. Select **No** for Dependent.
 - v. Select **No Income** for Income Source.
 - vi. Enter **0** for Income Amount.
 - vii. Select **Save**.
19. Click **Next** to save your edits and continue to the Work Readiness page (see figure below).

Work Readiness

Number of Children under 18

Dependent Care Needs

- Child Care
- Special Needs Child
- Adult Care
- Not at This Time

Objective Assessment Wizard – Work Readiness Page

20. In the **Work Readiness** section, select the following checkboxes:

- i. Dependent Care Needs –
 - 1) Not at This Time

- ii. Transportation.
 - 1) Has a Valid License.
 - 2) Private Vehicle Class.
 - 3) Lacks Automobile Insurance.
 - 4) Cannot Afford Gasoline.

- iii. Contacts.
 - 1) Telephone in Home.

21. In the Work Readiness Summary box, enter **Client has transportation challenges.**

22. In the Workplace Behavior section, select the following check boxes:

- i. Resume.

- 1) Does not Have Resume.
 - ii. Application Completion.
 - 1) Difficulty Summarizing Skills / Work History.
 - iii. Needs to Learn how to use Labor Market Information.
23. In the Workplace Behavior Assessment Summary box, enter **Client is enthusiastic about new occupational outlook.**
24. Click **Next** to save your edits and continue to the Barriers page (see figure below).

Health & Behavioral Observations

- Health**
 - Lacks Medical Insurance Coverage
 - Disclosed Disability
 - Needs Glasses
 - Needs Dental Work
 - Speech Impairment
 - Cannot Afford Medication
 - Reasonable Accommodation Required
 - Limitations in Ability to Work Certain Jobs
- Health has been cause for Absences from Job
- Pending Surgery or Medical Leave
- Not at this time

Objective Assessment Wizard – Barriers Page

25. In the Health & Behavioral Observations section, select the following checkboxes:
- i. Health.
 - 1) Lacks Medical Insurance Coverage.

26. In the Health & Behavior Observations Assessment Summary box, enter the following:
 - i. Client does not have personal medical insurance.
 - ii. Client experiences difficulty making a positive, strong first impression.
27. In the Economic Factors / Financial Situation section, select the following check boxes:
 - i. Credit/Financial.
 - 1) Needs Money Management Services.
28. In the Economic Factors/Financial Situation Assessment box, enter **Client has no money management experience.**
29. In the Barriers to Employment section, select the following check boxes:
 - i. Lacks Significant Work History.
 - ii. Sporadic or Limited Work History.
30. Click **Next** to save your edits and continue to the Criminal Background page (see figure below).

Criminal Background

Responses to the following items must be completely voluntary and confidential. This information is only used to determine need for additional services or resources in support of training and employment goals.

Information collected on this screen will NOT be included in print form.

Arrests

Arrests: No arrest record
 Arrest Record
 Pending Court Case

Conviction: Convicted (adult)
 Adjudicated (juvenile)

Current status of arrest: None
 Formerly incarcerated (not on parole)
 On probation
 On parole (adult)/aftercare

Objective Assessment Wizard – Criminal Background Page

31. In the Criminal Background section, select the following check boxes:
 - i. No arrest record.
 - ii. None.
32. Click **Next** to save your edits and continue to the Tests page (see figure below).

Tests

[Basic Skills Assessment](#)

Other Testing

Aptitude

Career Interest

Testing Results Comments:

Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

Objective Assessment Wizard – Tests Page and Assessments Tab

33. Click **Finish** to complete the OAS. The updated Plan tab redisplays.

Exercise #27: Add Employment Information





Objective: Record individual's employment information.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#).

Purpose: If an individual enters employment while receiving program services, staff can use an Employment form to add the employment record to associate with their program participation.

To create an Employment record:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign**  **icon** to expand their WP Application panel.
3. Click the **plus sign**  **icon** to expand the Add Employment panel (see figure below).



Add Employment Panel and Link

4. Click the **Add Employment** link. The Add/Edit Employer page displays with required fields in the Employer Information and Job Information sections (see figure below).

Add/Edit Employer

Employer Information

[Search Individual Employment History](#) [Select from Internal Job Order/Placement](#)

* Employer Name:

Verify Employer Name: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Employer FEIN:

* State Tax ID:

Address Line 1:

Address Line 2:

City:

State/Province:

County/Borough/Parish:

Zipcode:

Find Zip Code: [[USPS](#)]

Country:

* Industry Code (NAICS): [Search for NAICS Code](#)

* Industry NAICS Code: 513210

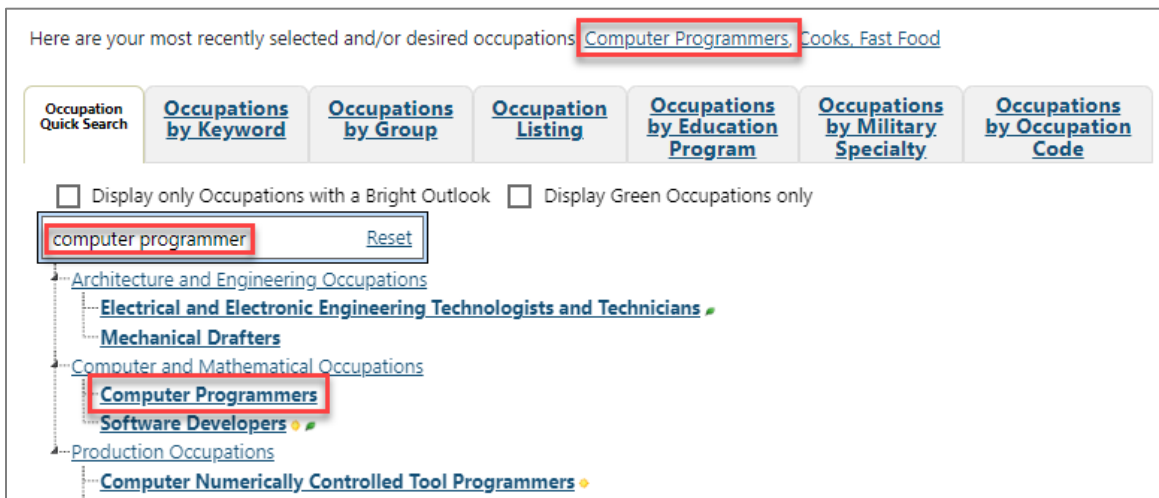
Add/Edit Employer Page with Employer and Job Information Sections

5. In the Employer Information section:
 - i. Enter **computer** and select the matching entry for **Computer Business Solutions** in Plano, TX.

Note: Alternatively, staff may click either the **Search Individual Employment History** link to pull the employer record, if previously recorded, or the **Select from Internal Job Order/Placement** link If the individual was hired through a system job order.

- ii. Enter **345781234** as the State Tax ID.
6. In the Job Information section:

- i. Enter **Computer Programmer** for the Job Title.
- ii. Click the **Select Occupation** link and select **Computer Programmers** as a recently selected occupation. If this title is not available as a recently selected occupation, enter **computer programmer** in the Occupation Quick Search textbox and select **Computer Programmers** from the match results, as shown below.



Select Occupation Search Options Screen

- iii. Select **No** for green job.
- iv. Select **Year** for Salary Frequency.
- v. Enter **\$40,000.00** for Wage.
- vi. Enter today's date for Job Start Date.
- vii. Click the Currently Employed checkbox.
- viii. Click the **Insert Occupation Description** link to document job duties.
- ix. Select **Yes** for the following items:

- 1) Primary Employer
 - 2) Receiving Fringe Benefits
 - 3) Receiving Health Care Benefits.
 - 4) Job Covered by Unemployment Compensation.
- x. Select **No** for the remaining items.
 - xi. Select **Yes** to Add to Employment History.
 - xii. Select **Save**. The Add Employment panel redisplay, with the added employment record listed in a table (as shown below).

[Add Employment](#)

Search:

Employer	Start/End Dates	City	Action
Computer Business Solutions	08/29/2023 - Present	Plano	Edit Delete

Added Employment Record