WorkinTexas.com Trade Adjustment Assistance (TAA) Case Management Training Guide

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

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Contents

Trade Program: Case Management Training

Course Objectives

After completing this course, you will be able to:

- Apply terms, business concepts and program features to navigate correctly and efficiently the WorkinTexas.com (WIT) website to manage Trade program participants.
- Perform system registration on behalf of program applicants.
- Search for and assist system-registered individuals.
- Perform data entry to determine program eligibility on behalf of Trade program applicants.
- Provide program services to program participants.
- Perform data entry to document the programmatic needs and achievements of program participants.
- Perform ancillary staff responsibilities as needed, e.g., manage case notes, communications, and assessments on behalf of program participants.

About This Training

As we progress through this training guide, you will be working as a Staff user type while assisting a TAA individual. Although your staff training account privileges will be set high, your staff privileges when operating in production WIT may not be as robust. The benefit of this scheme enables training participants to realize how powerful the WIT system can be.

The data in the training environment is fictitious. Make sure that you do not enter any Personal Identifiable Information (PII) in the training environment.

Glossary of Terms

Throughout the TAA case management training you will receive, we will reference the following terms:

- **Individual or Job Seeker** – Terms used interchangeably to describe a person who receives program services.
- **Applicant** – An Individual for whom program eligibility determination has yet to be determined.
- **Participant** – A program applicant who is actively receiving program services.
- **Staff** – Synonymous with case manager or workforce agency employee, a program expert who manages service delivery for program participants.
- **Assist** – Following system registration, staff can access a customer's profile by selecting **Manage Individuals > Assist an Individual** to manage the customer's information.
- **Currently Managing** – The section located within staff's left navigation menu that displays the name of the individual (or employer) whose account the staff user is currently managing.
- **Left Navigation Menu** – The list of staff user options staff access by selecting the **Menu** hyperlink at the top left center portion of the WIT screen.
- **Release Individual** – A hyperlink command displayed in the Currently Managing section that when selected, enables staff to stop assisting the current individual (or employer).

- **Ribbons** – The panels or containers displayed on the Programs tab screen for each program that maintain specific program details such as program services.
- **Widgets** – Quick links to specific information that are commonly used and easily accessed from the Staff dashboard. The job seeker and employer dashboards also have corresponding widgets. Widgets can be configured and customized by the staff member, job seeker or employer.
- **Wizard** – A step-by-step guide for completing a process in WIT, such as a program application form to determine program eligibility.
- **Dashboard** – Primarily used as the landing page, or the first page displayed upon Log In. The dashboard is a quick way for staff members to view common items and information through widgets.
- **Enrollments** – A term synonymous with program activities or services provided to a program participant.
- **Registration** – A term with dual meaning. System Registration is how an individual (or staff user on their behalf) creates an account profile, while Program Registration refers to completion of the program application form.
- **Soft Exit** – The process by which the system automatically closes a participant's active service delivery for a single program (i.e., Wagner Peyser, WIOA, SNAP E&T, Choices, or Trade) due to non-service for 90 consecutive days.
- **Combined Soft Exit** – The process by which the system automatically closes a participant's active service delivery in

two or more programs (i.e., Wagner Peyser, WIOA, SNAP E&T, Choices, and/or Trade), due to non-service for 90 consecutive days for each program affected.

- **Hard Exit** – The process by which staff manually creates a program outcome for the individual. This usually occurs if the individual satisfies a global exclusion reason (i.e., the individual is deceased).
- **Case Closure** – An interim step/process to officially stop the delivery of planned program services until the soft (or hard) exit process occurs.
- **Trade Petition** – A formal acknowledgement that when approved by the USDOL enables laid off workers to receive TAA program services.
- **Authorized Staff** – Staff users whose privileges enable them to perform specific functions in the system.
- **Co-enrollment** – This term is applied when an individual is enrolled in two or more federal programs simultaneously. In this context, the combined soft exit procedure will apply to individuals co-enrolled in the Wagner Peyser, WIOA, SNAP E&T, Choices, and/or Trade programs.
- **Case Assignment** – The process by which an individual is assigned to a specific case manager or a group of case managers for the purpose of receiving specialized assistance.
- **Formula Eligibility Determination** – The automated process by which the system determines applicant eligibility for program services based solely on the data entry performed and the business rules that govern eligibility determination.

- **Business Rule** – In software development, a **logic qualifier** usually in the form of an **If-Then** clause that enforces local, state, and federal regulatory requirements.
- **Document Management** – The process by which staff obtain client documents electronically and add them to the client's account profile.
- **Remote Signature** – The ability to affix required signatures digitally on various program forms on behalf of staff, the individual, and others as needed.
- **Case Note** – Staff-entered documentation that provides a fact-based description of an individual's interaction with the Work in Texas system.
- **Partner Programs (Ribbon)** – Staff use this section to review and document whether a program participant received services from known partner programs during enrollment in the current program.
- **Credentials (Ribbon)** – Staff use this ribbon to document and capture information related to credentials received during program participation.
- **Add/Entered Employment (Ribbon) –** Staff use this ribbon to capture information for program participants who enter employment during a program participation window.

About the Trade Program

The Trade Adjustment Assistance (TAA) program provides federally funded reemployment benefits to workers whose jobs have been impacted by foreign imports and trade. In addition to

TAA, workers may be eligible for related programs such as Alternative Trade Adjustment Assistance (ATAA). The ATAA programs focus on workers 50 years of age or older who return to positions paying less than their trade-impacted employment.

Staff use the TAA module to complete applications, establish participation records, and enroll individuals in activities. Depending on the activities needed, and funding available, staff may also complete additional applications and forms. The system determines TAA/ATAA eligibility at the end of the application process.

Getting Started: Staff Login

To manage service delivery to individuals through the Trade program, staff must first log in to the WIT system.

Note: Staff users do not create their own accounts. The System Administrator creates and manages staff accounts, staff logins, staff privileges, and Workforce Area assignments.

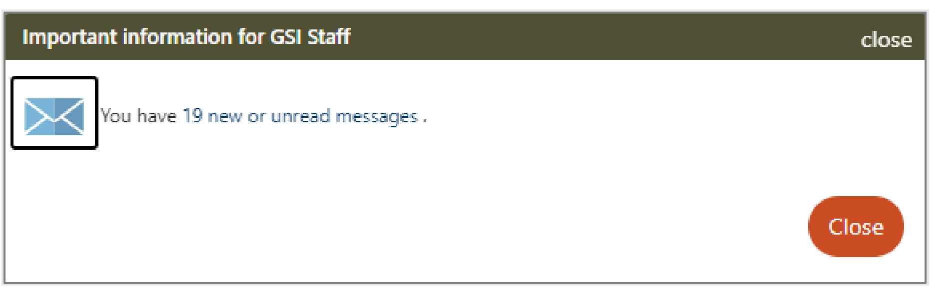
The production environment uses a single sign-on approach which enables you to use the same login credentials for other Workforce applications such as The Workforce Information System of Texas (TWIST). The staff training login is generic and applies to the training environment only.

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**.

Message Prompt

When any user type enters the WIT system, they will be presented with a New or Unread Message prompt like the following figure if they have at least one qualifying message.

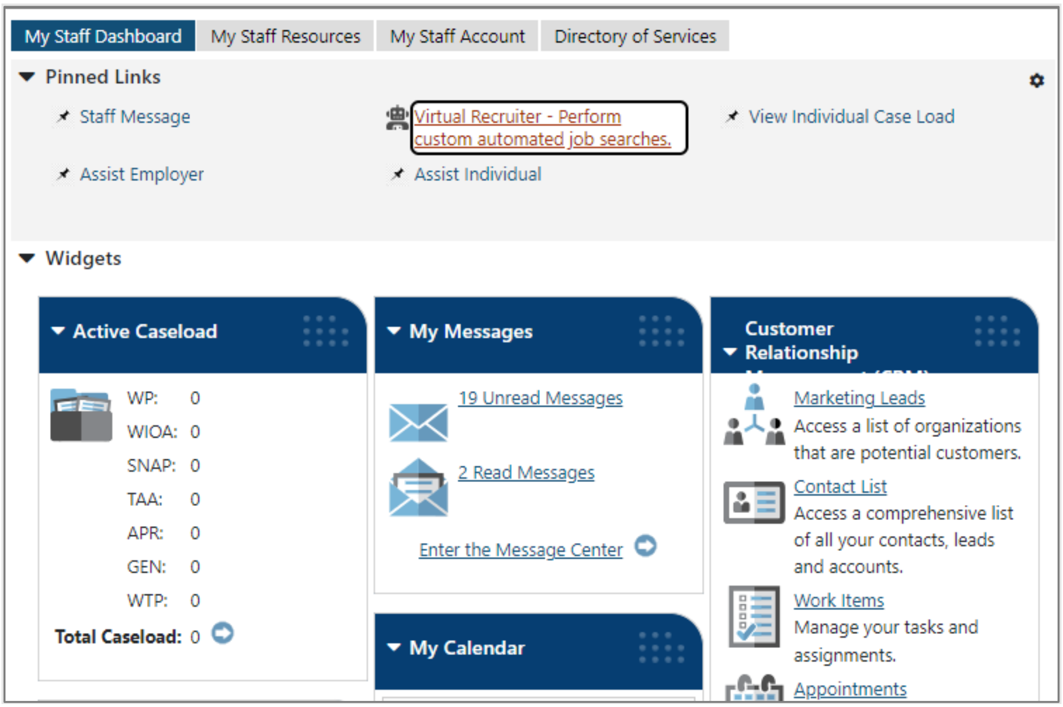


New or Unread Message Prompt

Staff may access their Message Center inbox by selecting the hyperlink text (or the envelop icon) or click **Close** to view their message(s) later. For more information, see the System Overview training video.

My Staff Dashboard

By default, the WIT system will display My Staff Dashboard, as shown in the sample figure that follows.



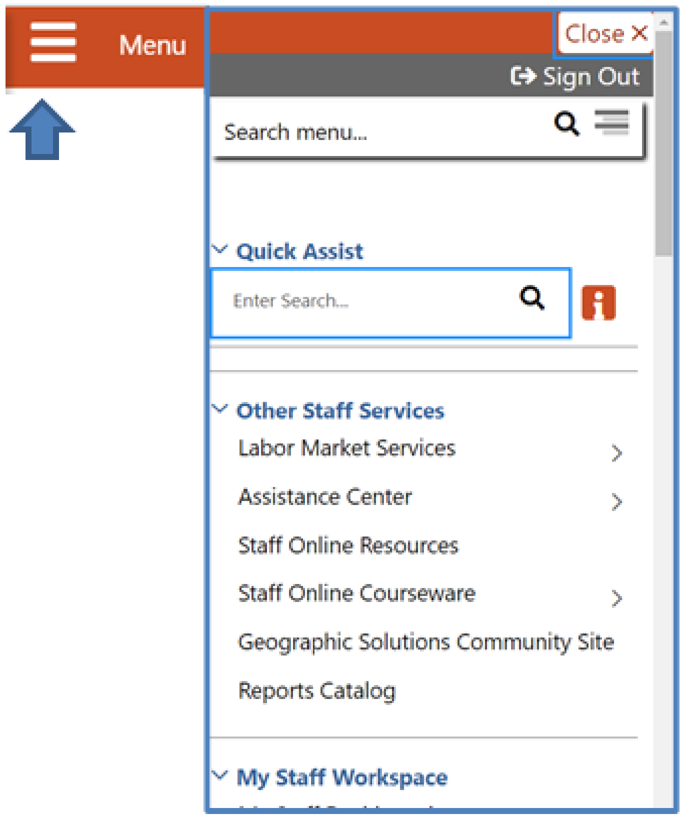
My Staff Dashboard, Excerpt

This feature is a quick way for staff members to view common items and information through widgets as soon as they log in. Widgets provide quick visual access to information that is also available through links or selections within the system. Staff can configure widgets to display at the top of the home screen. For more information, see the System Overview training video.

Left Navigation Menu

The following left side-bar menu groups and headings are located under the Menu icon on the top left side of the WIT page.

Note: The order in which staff menu options display may vary. To edit the display, go to the page footer and select the following: **Settings > Preferred Settings > Configure Navigation Menu**.



Left Side-Bar Menu

The left navigation menu consists of the following options or groups for staff:

My Staff Workspace

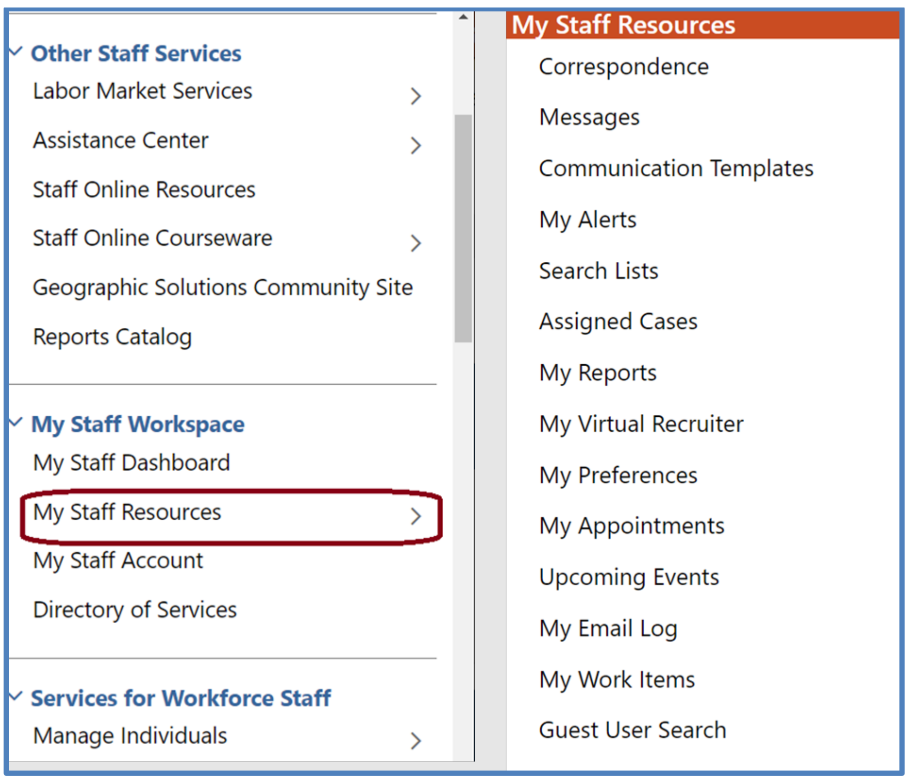
- **My Dashboard** - Landing page when logged on to WIT that consists of Widgets.
- **Quick Assist** - The Quick Assist is available at the top of the left side-bar menu and is based on the last four digits of an individual's SSN, last name, an employer's company name or Federal Employer Identification Number (FEIN), or other criteria.
- **Other Staff Services**
    - **Labor Market Services** - View information about labor markets in your state.
    - **Assistance Center** - Find general site use information such as Quick Reference Cards.
    - **Staff Online Resources** - Develop and maintain a directory of staff member resource information using the Content Management tool in Admin.
    - **Staff Online Courseware** - Access numerous professional online training videos and courses developed for workforce staff members.
    - **Geographic Solutions (GSI) Community Site** - GSI is the vendor for the new WorkinTexas.com software. The community site is a portal to share software best practices and to stay current with events and news

pertinent to a specific region, state of the U.S. labor market, and GSI product releases.

- **Reports Catalog** – Access a catalog of standard reports and email a report to other staff members. Allows for formatting a report.

- **My Staff Workspace** – General tools for staff to communicate and set preferences.
- **My Staff Resources** - Provides links to tools commonly used by staff.
    - **Correspondence** - View and manage letters that you have created.
    - **Messages** - View and manage your messages.
    - **Communication Templates** - View communication templates that you may have created.
    - **My Alerts** - View set alerts.
    - **Search Lists** - View saved search lists.
    - **Assigned Cases** – List of individuals currently assigned to you.
    - **My Reports** - View any saved reports.
    - **My Virtual Recruiter** - View and manage Virtual Recruiter scheduler for recurring searches for job openings or candidates.
    - **My Preferences** - Change the interface settings and user experience.

- **My Appointments** - View and manage scheduled appointments.
- **Upcoming Events** - View and manage upcoming events.
- **My Email Log** - View and manage emails sent or received via the system.
- **My Work Items** - For case management, this heading is not currently used.



Staff Left Side-Bar Menu - My Staff Resources

- **My Staff Account** - Provides information on how your staff account is configured, including basic login, name, address, phone number and email. Other options include:

  - **Office** - Workforce region and office to which you are assigned.
  - **Preferences** - Adjust system default settings for interface screens including alerts, landing pages for assisting individuals and employers, case note sort orders, and menu preferences for summary and detail landing pages.
  - **Staff Signature** – Maintains a digital copy of the signature you created using your mouse.
- **Directory of Services** - A consolidated list of the left side- bar menu groups and functions including Services for Workforce Staff, Reports, Customer Relationship Management, Communications, Templates, Document Management, Schedules, and Other Staff Services.

Services for Workforce Staff

- **Manage Individuals**
  - **Create an Individual** - Create an individual user account.
  - **Common Intake** – Create one application to collect data requirements for multiple federal programs simultaneously.
  - **One Case Note to Multiple Individuals** - Create one case note to distribute to multiple individuals accounts.
  - **Assist an Individual** - Assist an existing individual account.

- **TAA Eligible Worker Layoff List** – List of individuals approved to be served under an eligible TAA petition.
- **Upload Rapid Response Individuals** – Import offline registrations for Rapid Response participants.
- **Manage Outreach Pool** – Used by SNAP & TANF/Choices staff to manage recipient referrals, to set up and manage initial client appointments, and manage appointment rosters.

- **Manage Employers**
    - **Create an Employer** - Create an employer user account.
    - **Assist an Employer** - Assist an existing employer account.
    - **Employer Access Rights** - Modify the employer's access to the system through setting access rights.
    - **Employers Posting Jobs** - Review jobs from internal and external employers.
    - **Local Employer Sites** - Review company profiles from the Data Axle database.
    - **One Case Note to Multiple Employers** - Create one case note to distribute to multiple employer accounts.
- **Manage Resumes**
    - **Create a Résumé** - Create a candidate résumé in the system.
    - **Search for Résumés** - Search for candidate résumés within the system.
    - **Match Resumes to Jobs** - Perform a search for jobs using criteria from a résumé.
    - **Candidate Referrals** - Create a candidate referral based on job search.

- **Manage Job Orders**
    - **Create an Internal Job** - Create or manage internal jobs.
    - **Search for Internal Job** - Search for an existing internal job order.
    - **Search for All Jobs** - Search for internal or external jobs.
- **Manage Labor Exchange**
    - **Mass Job Referrals** - Create job referrals for individuals.
    - **Mass Candidate Referrals** - Create candidate referrals for employers.
    - **Enter Referral Results** - Enter job referral results.
    - **Referrals Pending Review** - Manage pending referrals to suppressed jobs.
    - **Job Candidate Follow-up** - Manage follow-up referrals.
    - **Job Skill Sets** - Manage custom job skill sets.
    - **External Job Options** - Manage criteria to control the display of external jobs in the system.

- **Manage Activities**
    - **Individual Services** - Manage service plan data for individuals.
    - **One Service to Multiple Individuals** - Create one service for distribution to multiple individuals.
    - **Employer Services** - Manage service plan data for employers.
    - **Event Rosters** - Manage the events roster for registered event participants.
    - **One Service to Multiple Employers** - Create one service for distribution to multiple Employers.
    - **Scheduled Services** - Displays a list of schedules and services for a specific date, office, and service.
    - **Events** - Create events, add participants, and manage the events calendar for system users.
- **Manage Providers** – Create and manage training and service provider accounts.
- **Manage Case Assignment** – Presents options to create and manage case assignment groups for program participants.
- **Manage Funds** – Advanced Individual Fund Tracking (AIFT) module to track fundable services and manage the budgets that support them. Not in use at this time.
- **Manage WARN Notifications** – Functions to manage the Worker Adjustment and Retraining Notification (WARN) Act for workers laid off due to plant closings and mass layoffs.

- **Manage Visitors** – For VOS Greeter functions. Not covered in this manual.
- **Manage Surveys** - Access to preview, edit, and manage active surveys.
- **Manage Online Forms** - Allows staff to create and fill out forms on the individual's or employer's behalf.

Reports – This group offers multiple ways to access, generate and save standard and customized workforce reports. Not covered in this manual.

Customer Relationship Management (CRM) - Offers Employer Outreach Specialists and Business Services Representatives the tools and resources to actively manage employer recruitment efforts, convert potential business customers into Marketing Leads for the purpose of helping these businesses, and to track the profile details they manage on behalf of these potential recruiting employers.

- **Create a Marketing Lead** - Access and complete a mini-registration for a potential employer recruit.
- **Contacts List** - Displays all primary and secondary contacts from when Marketing Lead employers were created.
- **Marketing Leads** - Displays all primary contacts from when Marketing Lead employers were created.
- **Work Items** - For case management, this heading is not currently used.
- **Appointments** - Create or view a list of existing appointments.

- **Online Surveys** - Create new survey forms and display all current forms (surveys) created within the CRM module.

Communications - Tools used for communicating with individuals and/or employers:

- **Messages** - Manage messages sent or received with your login.
- **Correspondence** - List letters you saved in the system.
- **Alerts** - Manage staff alerts and text watches on behalf of your customers.
- **Virtual Recruiter** - Set up and manage recurring job and résumé searches.
- **Email Log** - View emails you sent or received.

Templates

- **Job Order Skill Sets** - Create or modify detailed skill sets to find candidates for job openings.
- **Job Order Templates** - Create and manage templates for job orders.
- **Communication Templates** - Create or modify correspondence letter templates and print correspondence.
- **Case Note Templates** - Create and manage templates for case notes.
- **Search List** - Manage your saved search lists for individuals and employers.

Schedules

- **Appointment Calendar** - Create and manage appointments.
- **Events Calendar** - View and create upcoming events, track attendees.
- **Event Roster** - Displays event information per office.

Document Management

- **Search Documents** - Search for electronic documents stored in the system, which have been uploaded and attached to an individual's account portfolio.

Individual System Registration

Note: This lesson is for State staff who will perform individual system registration when necessary. Local staff will assist the individual following account creation.

Training Objectives

After completing this lesson, you will be able to:

- successfully navigate to **Manage Individuals > Create an Individual**, when tasked with assisting individuals with system registration.
- understand what it means to be a registered individual.
- recognize questions that are required versus optional.
- understand questions defined as conditional that may require additional questions to be completed based on participant answers.
- successfully complete system registration for the individual.

Before a Trade program applicant can receive program services in the WIT system, they must have an account profile. To meet this requirement, State staff can manually create an individual account by performing the steps that follow.

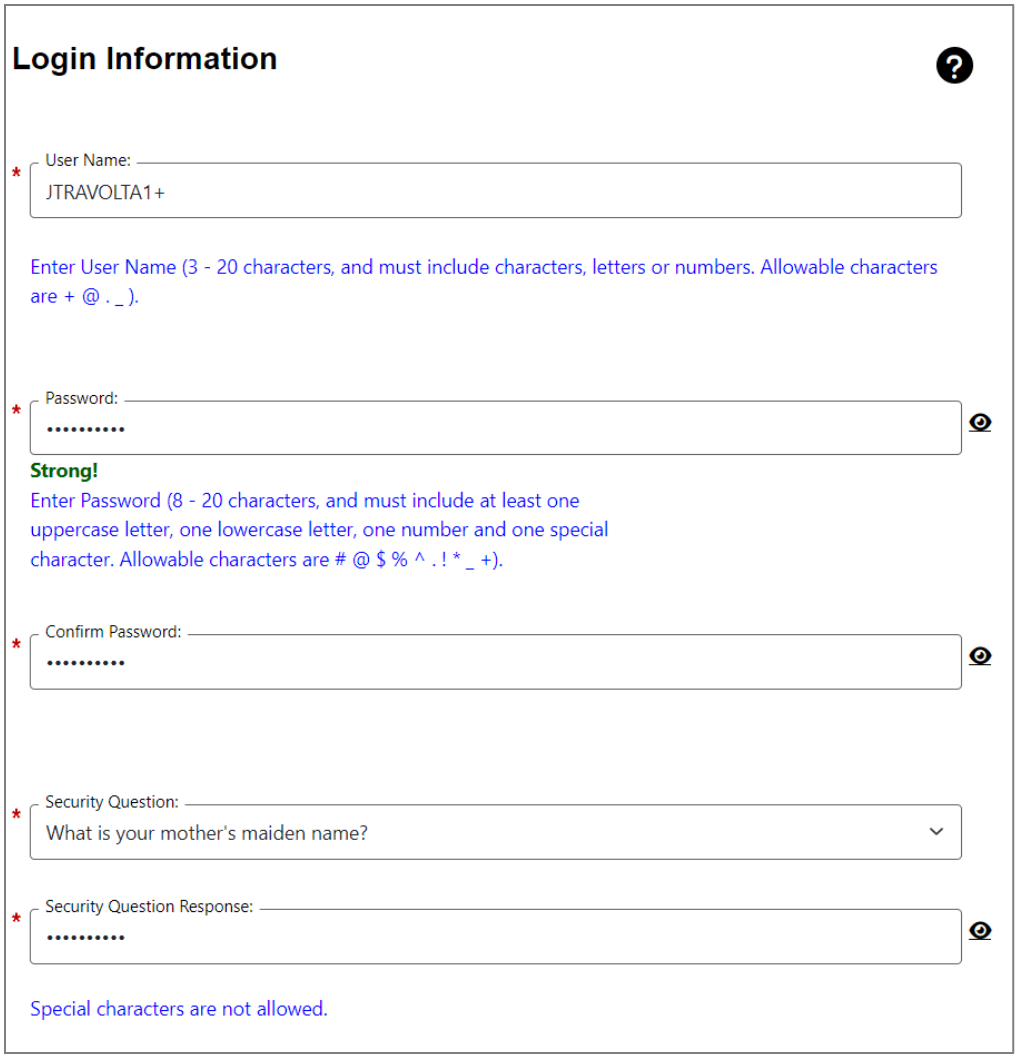
Notes: Fields marked with a red asterisk (*) are required.

To create an individual account:

1. From the Services for Workforce Staff menu group in the left navigation menu, click **Manage Individuals > Create an Individual.**

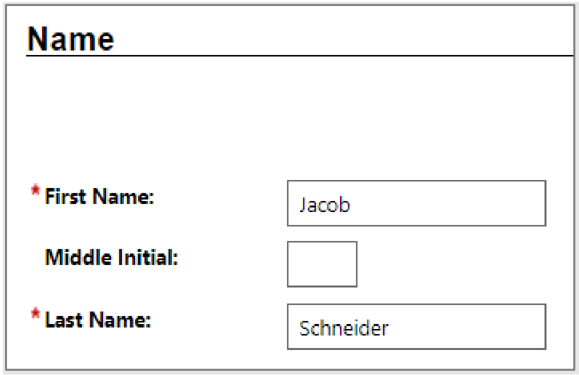
2. Complete the Login Information section to enter the individual's desired **Usernam**e and password for system login purposes.

3. Choose a security question the individual desires and enter a response.



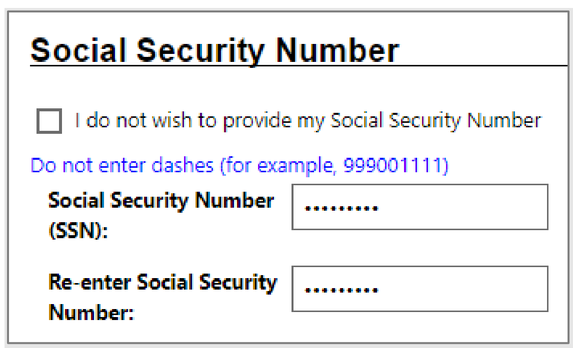
Login Information Section of Create Individual Account Process

4. In the Name section, enter the individual's first and last name.



Name Section of Create Individual Account Process

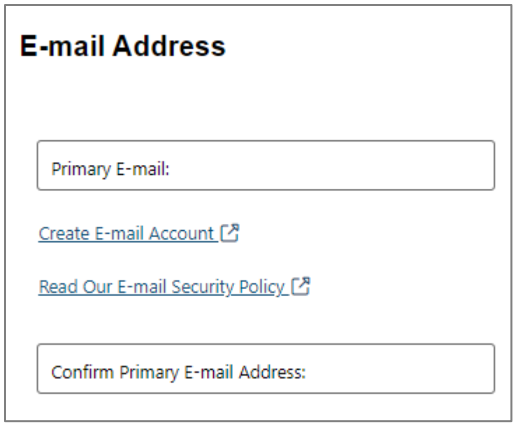
5. In the Social Security Number section, enter the individual's unique nine-digit number and re-enter it. If the individual fails to provide their Social Security Number (SSN), select the checkbox.



Social Security Number Section of Create Individual Account Process

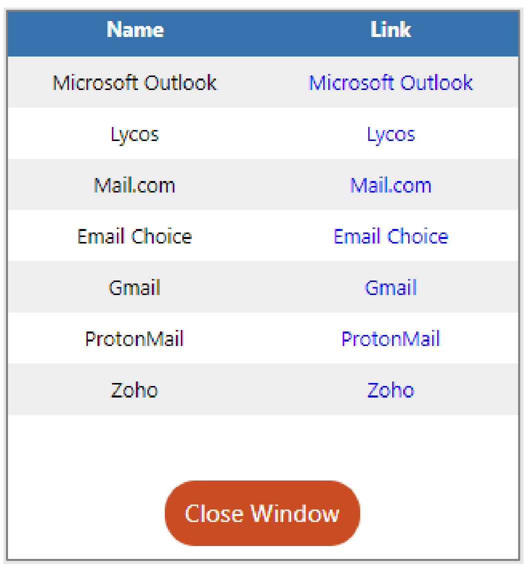
6. In the Phone Number section, enter the individual's primary phone number.

7. In the E-mail Address section, enter the individual's primary email address and re-enter it in the Confirmation text box.



Email Address Section of Create Individual Account Process

Note: If desired, click the **Create E-mail Account** link to create a new email account from a list of free providers, as shown in the figure that follows.



Name	Link
Microsoft Outlook	Microsoft Outlook
Lycos	Lycos
Mail.com	Mail.com
Email Choice	Email Choice
Gmail	Gmail
ProtonMail	ProtonMail
Zoho	Zoho

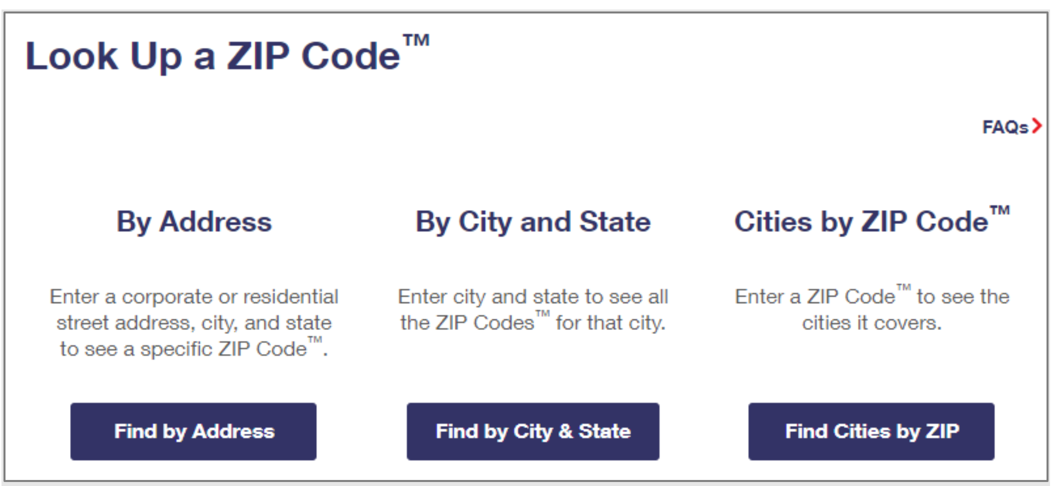
Create New Email Account Window

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

Primary Location Information Section of Create Individual Account Process

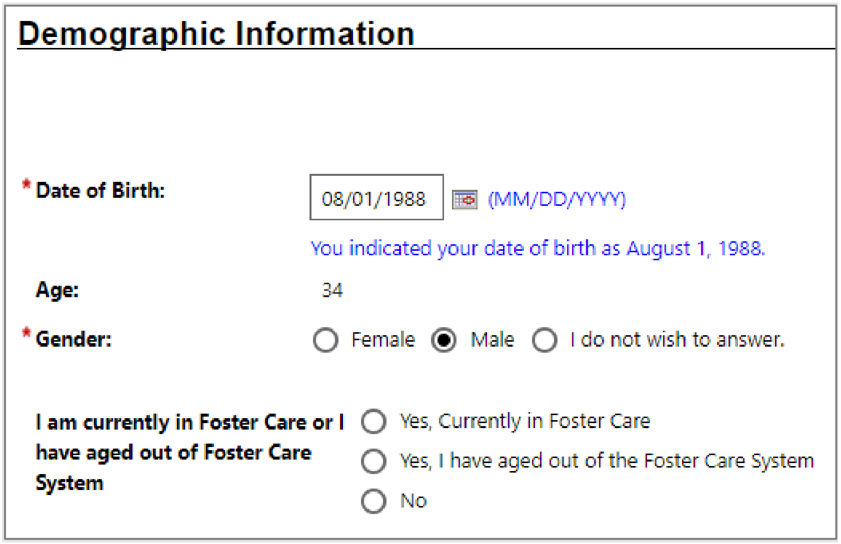
9. In the Residential Address section, select whether the individual is homeless and enter their address details accordingly. If the individual's mailing address differs, select the checkbox to indicate this, and enter the individual's mailing address in the fields displayed.

Note: If unsure of the individual's ZIP Code, select the **Find zip code** link to access a search screen from the U.S. Postal service, as shown in the figure that follows.



USPS Zip Code Look Up Webpage

10. In the Demographic Information section, enter the individual's date of birth and select their gender. (Optional) Select their Foster Care status.



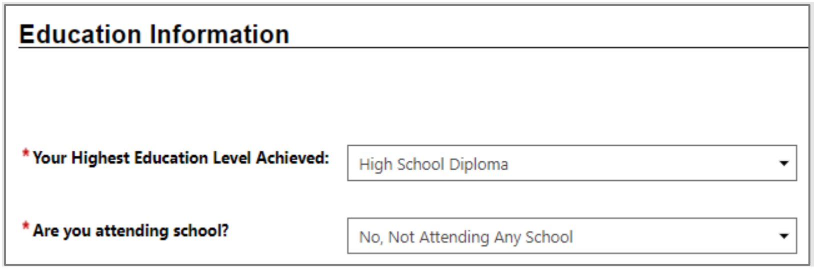
Demographic Information Section of Create Individual Account Process

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.

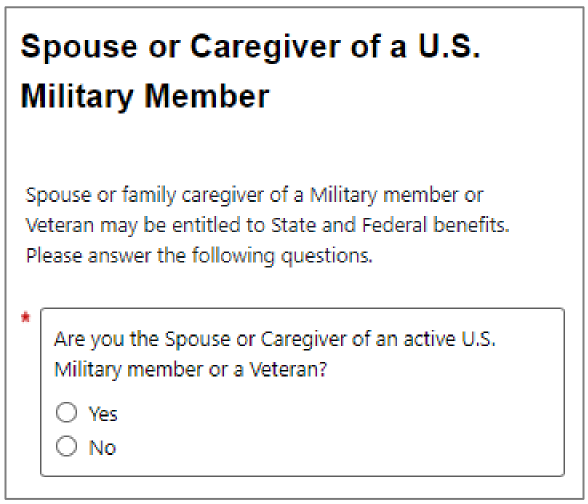
12. In the Disability section, select to indicate whether the individual has a disability.

13. In the Education Information section, select the individual's highest education achievement level and their current school status.



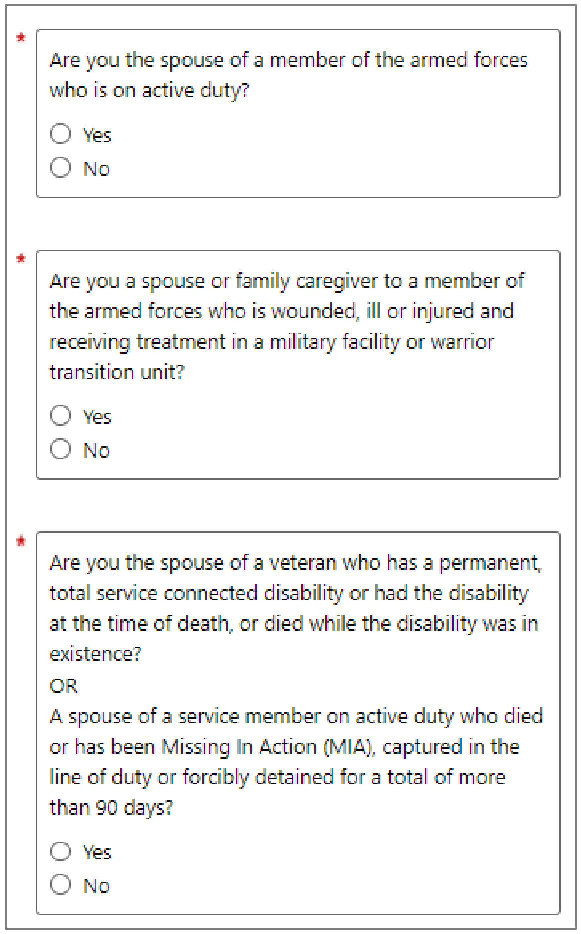
Education Information Section of Create Individual Account Process

14. In the Spouse or Caregiver of a U.S. Military Member section, provide responses for the questions displayed.



Spouse or Caregiver of a Military Member Section of Create Individual Account Process

A Yes response will trigger the display of additional information, as shown below. These responses are required.



* 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?

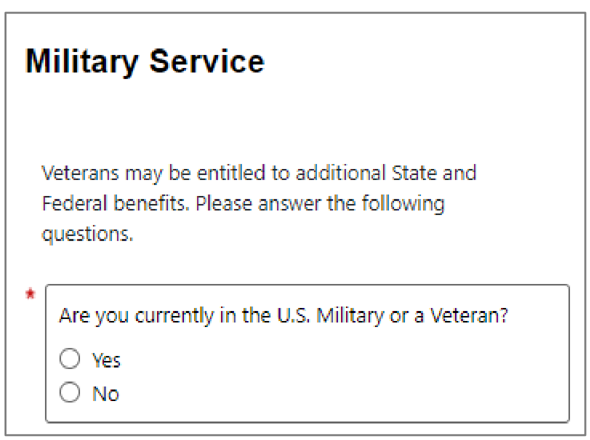
- Yes
- No

* 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

Spouse or Caregiver of a U.S. Military Member Section (Expanded)

15. In the Military Services section, provide responses to each question.



Military Service

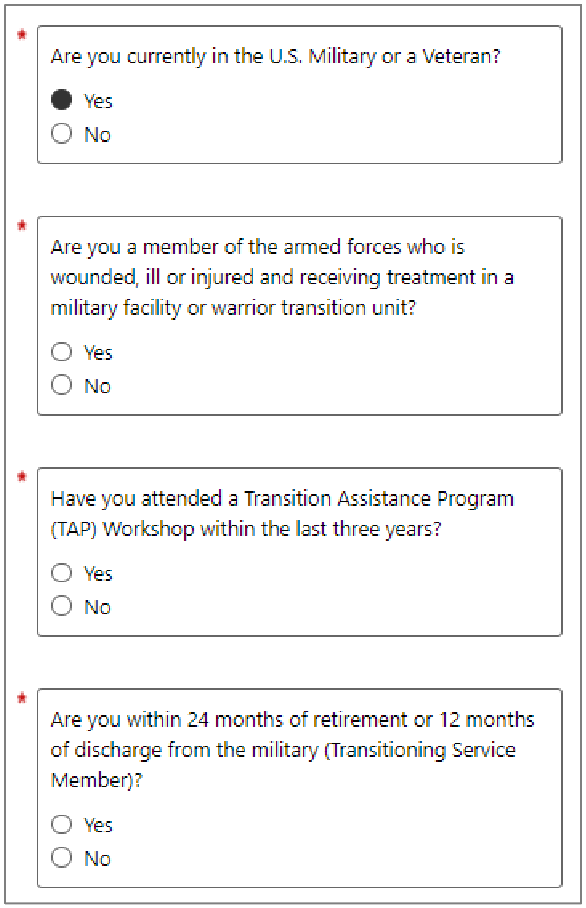
Veterans may be entitled to additional State and Federal benefits. Please answer the following questions.

* Are you currently in the U.S. Military or a Veteran?

- Yes
- No

Military Service Section of Create Individual Account Process

16. A Yes response will trigger the display of additional information you must complete, as shown in the sample figure that follows.


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

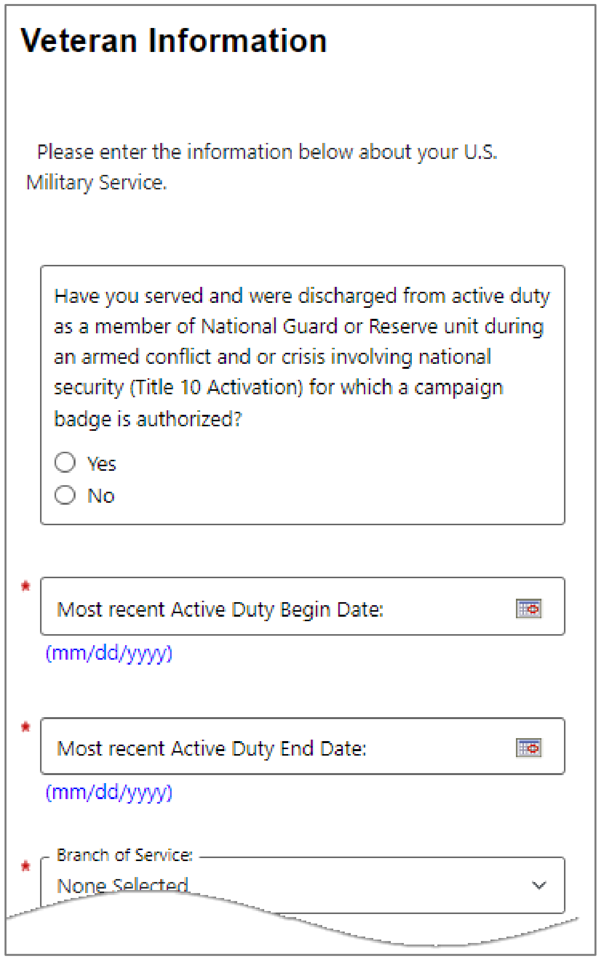
* Are you a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit?
  - Yes
  - No

* Have you attended a Transition Assistance Program (TAP) Workshop within the last three years?
  - Yes
  - No

* Are you within 24 months of retirement or 12 months of discharge from the military (Transitioning Service Member)?
  - Yes
  - No

Military Service Section of Create Individual Account Process (Expanded)

17. (Conditionally required if user selects Yes for Are you currently in the U.S. Military or a Veteran?) Minimally, provide a response for each required item as shown in the sample excerpt that follows.



Veteran Information

Please enter the information below about your U.S. Military Service.

Have you served and were discharged from active duty as a member of National Guard or Reserve unit during an armed conflict and or crisis involving national security (Title 10 Activation) for which a campaign badge is authorized?

- Yes
- No

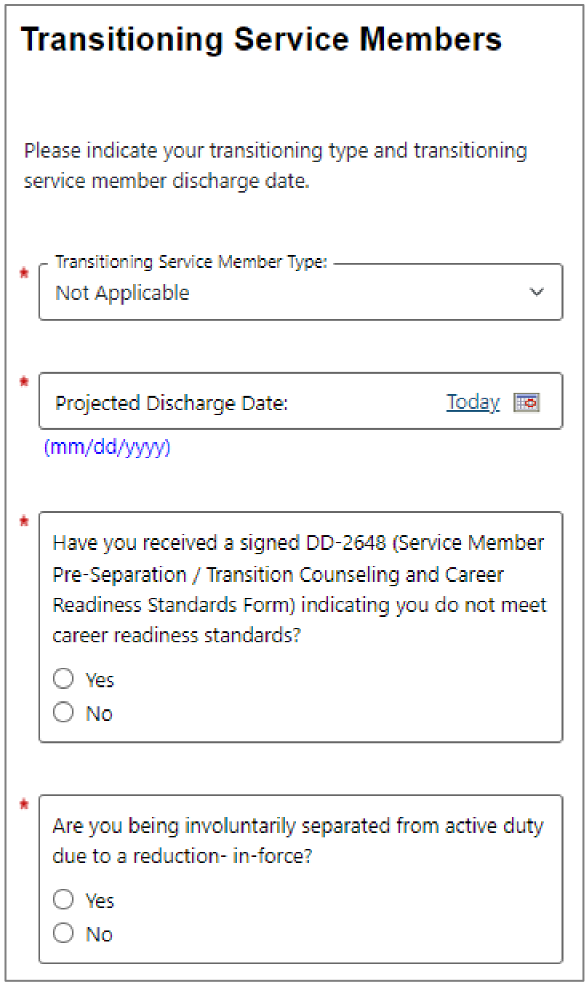
* Most recent Active Duty Begin Date:
(mm/dd/yyyy)

* Most recent Active Duty End Date:
(mm/dd/yyyy)

* Branch of Service:
None Selected

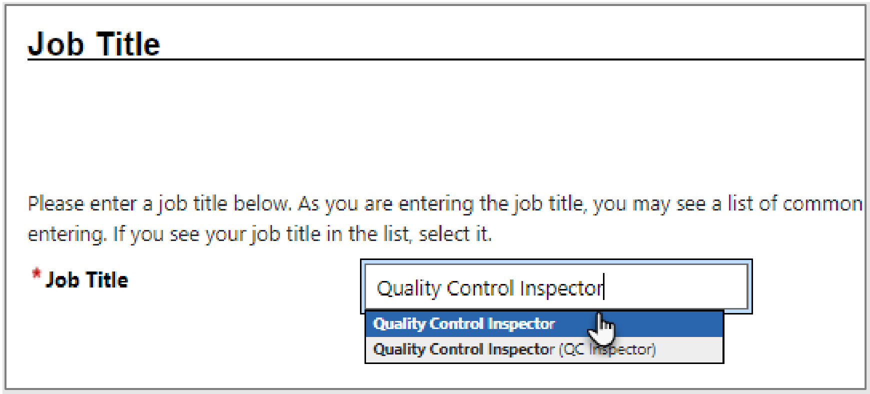
Veteran Information Section of Create Individual Account Process

18. (Conditionally required if user selects Yes for Are you within 24 months of retirement or 12 months of discharge from the military (Transitioning Service Member). Transitioning service members must provide the following responses:



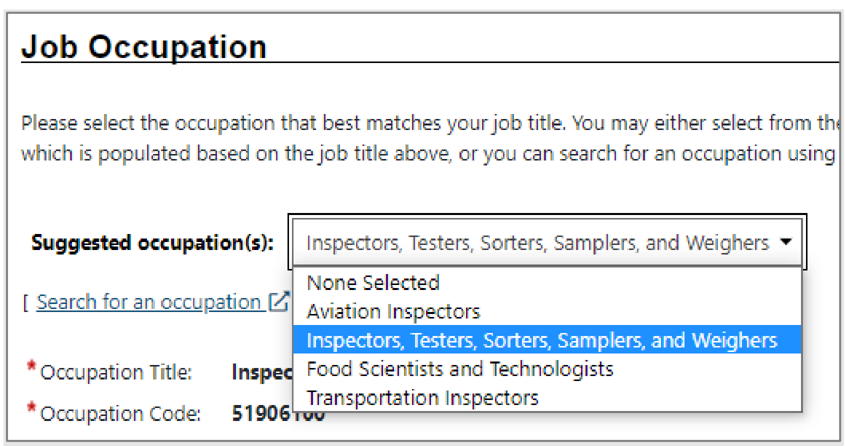
Transitioning Service Member Section of Create Individual Account Process (Expanded)

19. In the Job Title section, enter the individual's preferred job title. As you type, suggested matches will display from which you may select a title.



Job Title Section of Create Individual Account Process

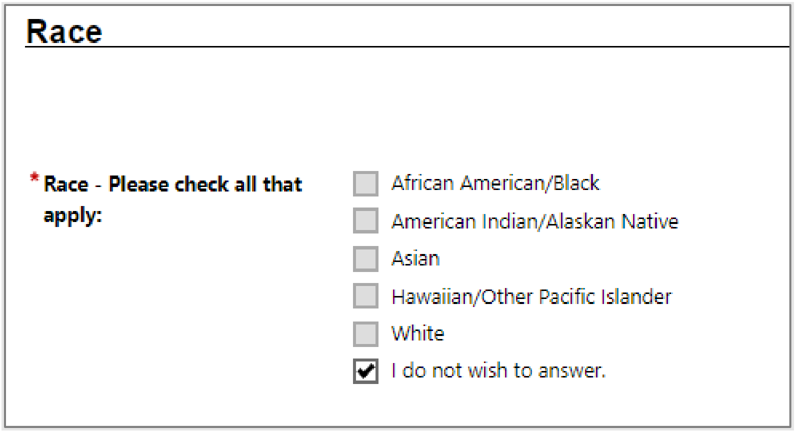
Note: If the system recognizes the job title you entered, it will display suggested occupations for selection from the O*NET database. If the system cannot recognize the job title you entered, select the **Search for an occupation** link to select the best matching occupation code. As a result, the system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



Job Occupation Section of Create Individual Account Process

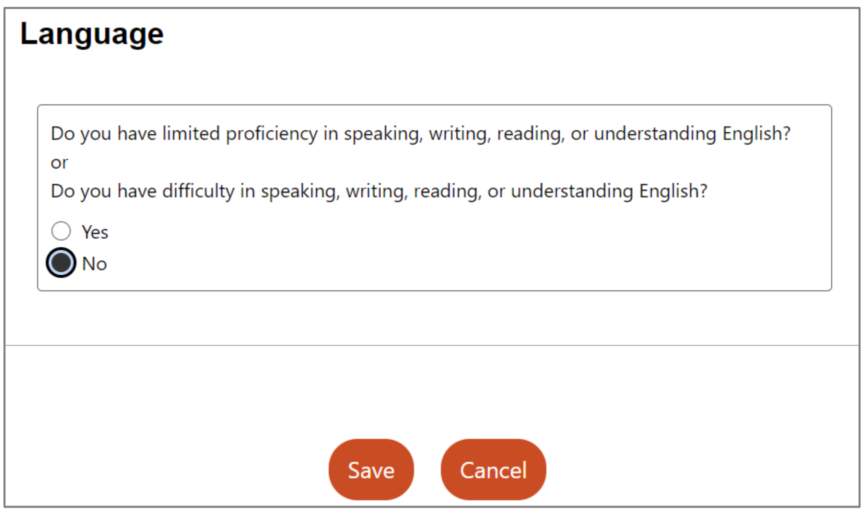
20. In the Ethnic Origin section, select whether the individual is of Hispanic or Latino heritage.

21. In the Race section, select all races that apply (your choice).



Race Section of Create Individual Account Process

22. In the Language section, provide a response.

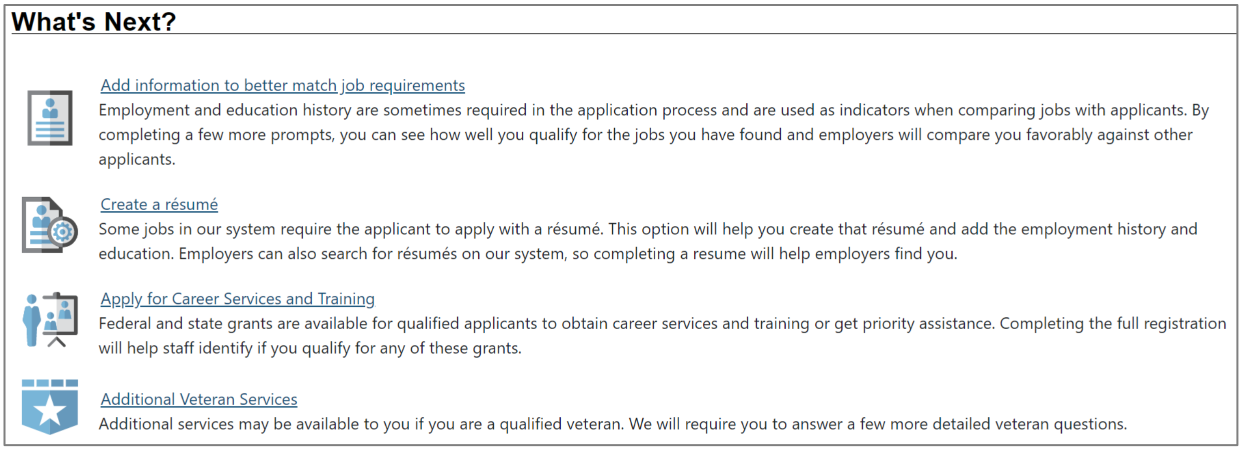


Language Section

23. Select the **Save** button to complete the registration.

Note: If you encounter an error upon saving the data entry, the system will display an error message in red bullet point text at the top of the page.

Upon successfully saving the data entry, the system displays a Registration Confirmation page (see figure below).



Sample Registration Confirmation Page

Use links on this page to continue assisting the individual, if appropriate.

Staff Assisting Individuals

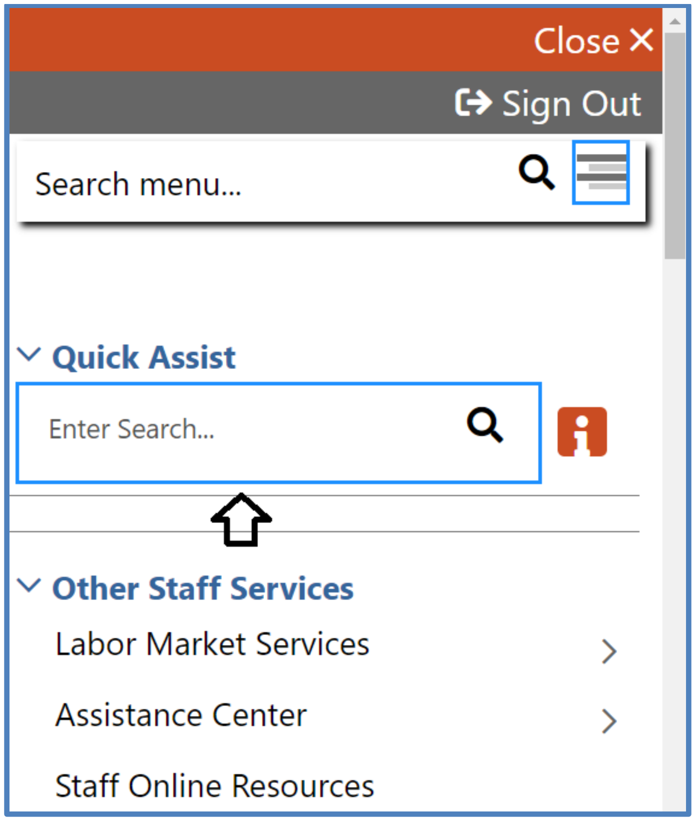
Searching for an Individual and Assisting

Note: The information that follows supports information presented in the System Overview training video.

Once an individual has completed system registration, you can perform a search for their account and help using any of the following search methods:

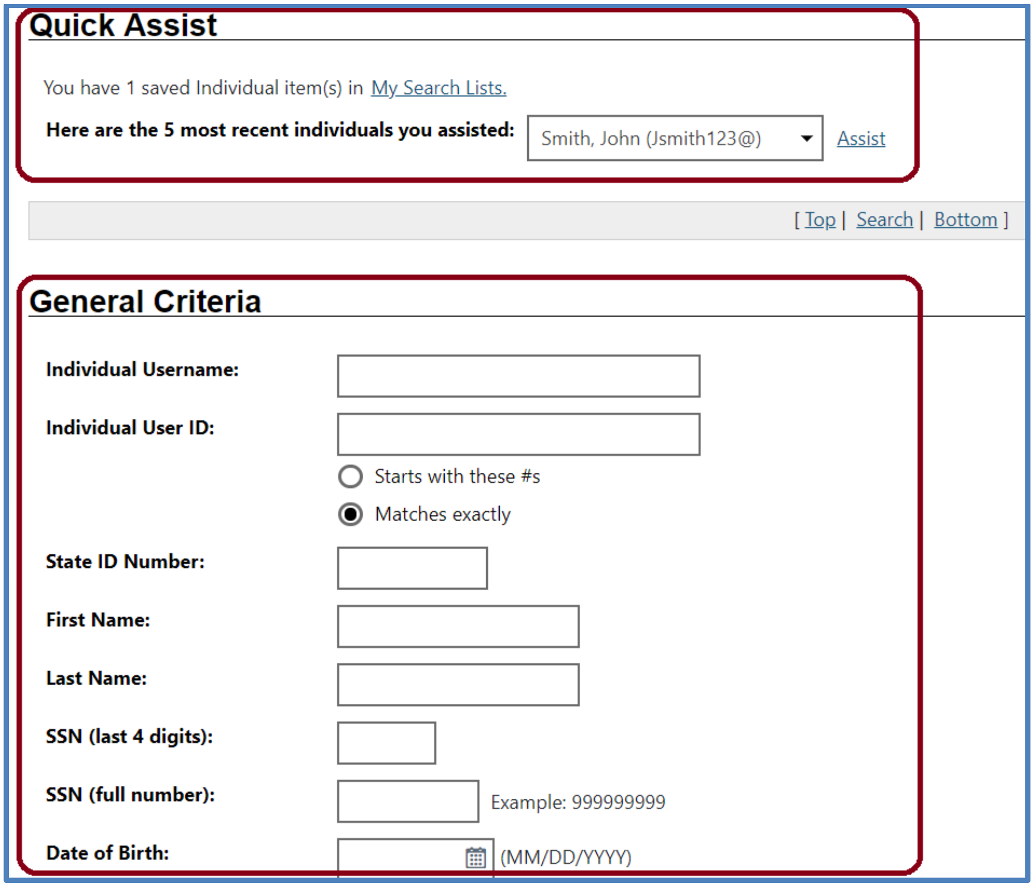
- **Quick Assist** - The Quick Assist is a convenient way to search for an individual or employer and is located at the top of the left side-bar menu and is based on the last four digits of an individual’s SSN, last name, an employer’s company name or Federal Employer Identification Number (FEIN), or other criteria.

Note: The full range of criteria used in the search can be identified by clicking the Help icon at the right of the search entry field, as shown in the figure that follows.



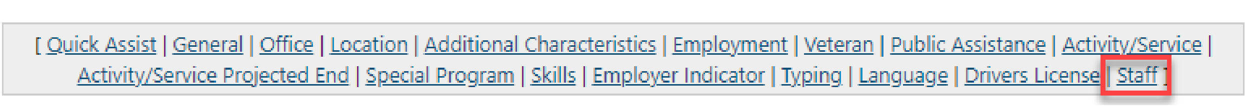
Quick Search Menu / Help Icon

- **General Search – To perform a general search for an individual:**
    - Select **Manage Individuals**, **Assist an Individual** from the left side-bar menu.
    - A search window is displayed allowing you to specify information about the individual you want to assist.
    - Select a desired name from the Quick Assist drop-down box to quickly access one of the last X accounts you previously accessed or enter criteria to find a desired individual in the General Criteria section.



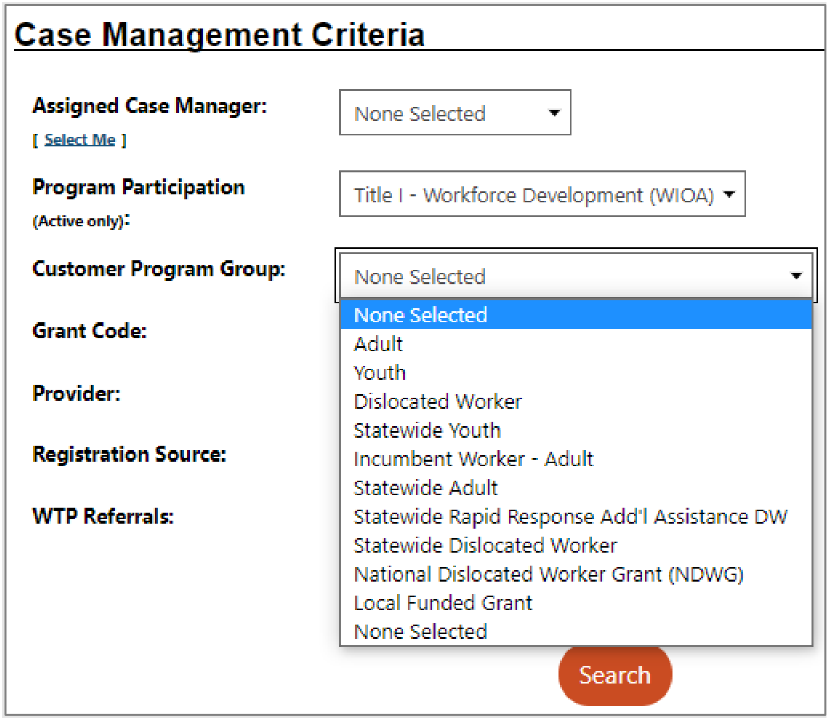
Search General Criteria

- **More Search Options** – The **More Search Options** link near the bottom of the page will launch a link menu at the top of the page with additional search options. An example - to conduct a general customer search based on program participation, click the **Staff** jump link.



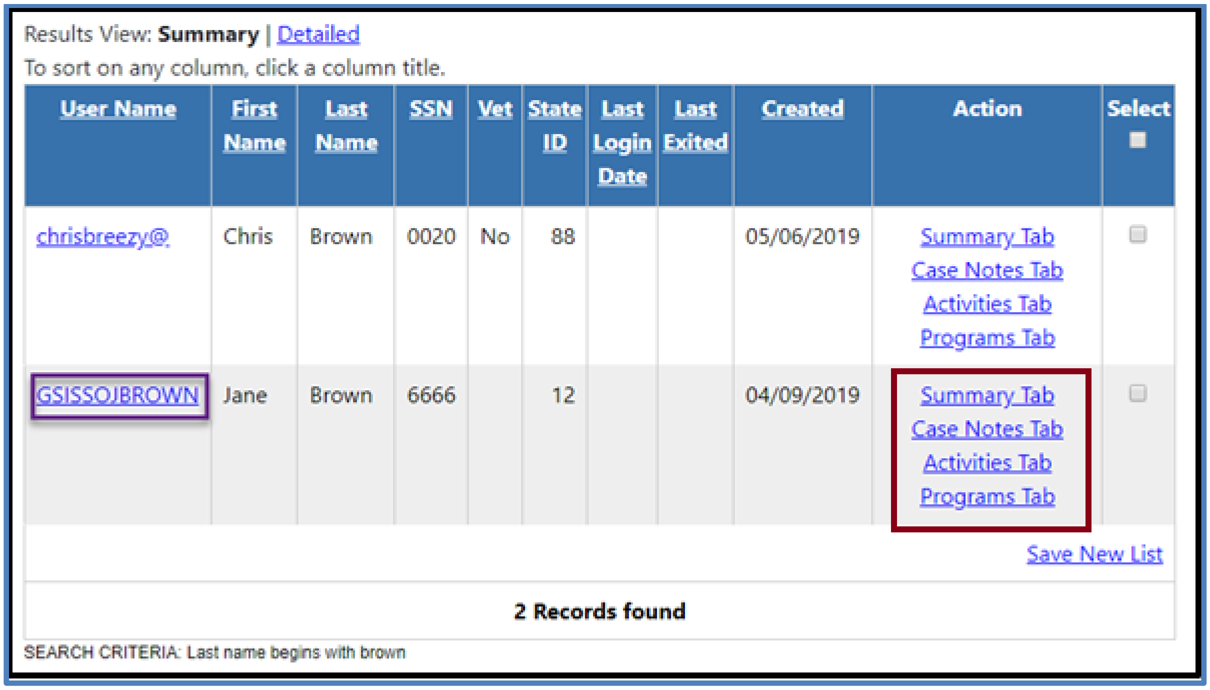
Criteria Options for Performing a Job Seeker Search

If you select a desired program, the system will refresh or redraw the screen to display related custom program groups to filter your selection.



Case Management Criteria Search Option

- Click **<u>Search</u>** link at the bottom of any section or click the **Search** button at the bottom of the page.
- Sort on any column header to reorganize results.
- Click **Modify current criteria** at the bottom of the page to add or remove criteria to change results.
- When you locate your Individual, click the **Username** (see figure below).



Results View: **Summary** | Detailed

To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Action	Select
chrisbreezy@	Chris	Brown	0020	No	88			05/06/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	
GSISSOJBROWN	Jane	Brown	6666		12			04/09/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	

Save New List

2 Records found

SEARCH CRITERIA: Last name begins with brown

Search Results and Actions

Search Result Actions

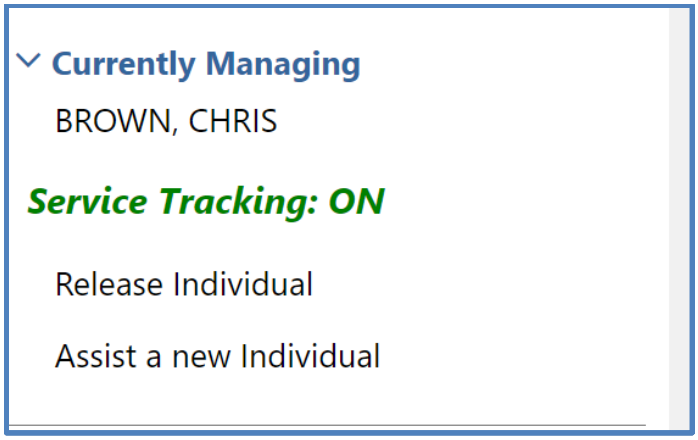
- **Summary Tab** - Case summary of services.
- **Case Notes Tab** - Case Notes for the individual.
- **Activities Tab** - Activities for the individual.
- **Programs Tab** - Wagner-Peyser program details.

Note: Using the My Staff Account feature, staff may customize the hyperlink display under the Actions column.

Currently Managing

When assisting an individual or employer, Currently Managing displays on the left side-bar menu with their name and links to the folders, profiles, and specific functions. Currently Managing also displays at the top of the page.

Note: A flag and/or (MSFW) will also display next to the name if the individual is a veteran or a Migrant Seasonal Farm Worker.

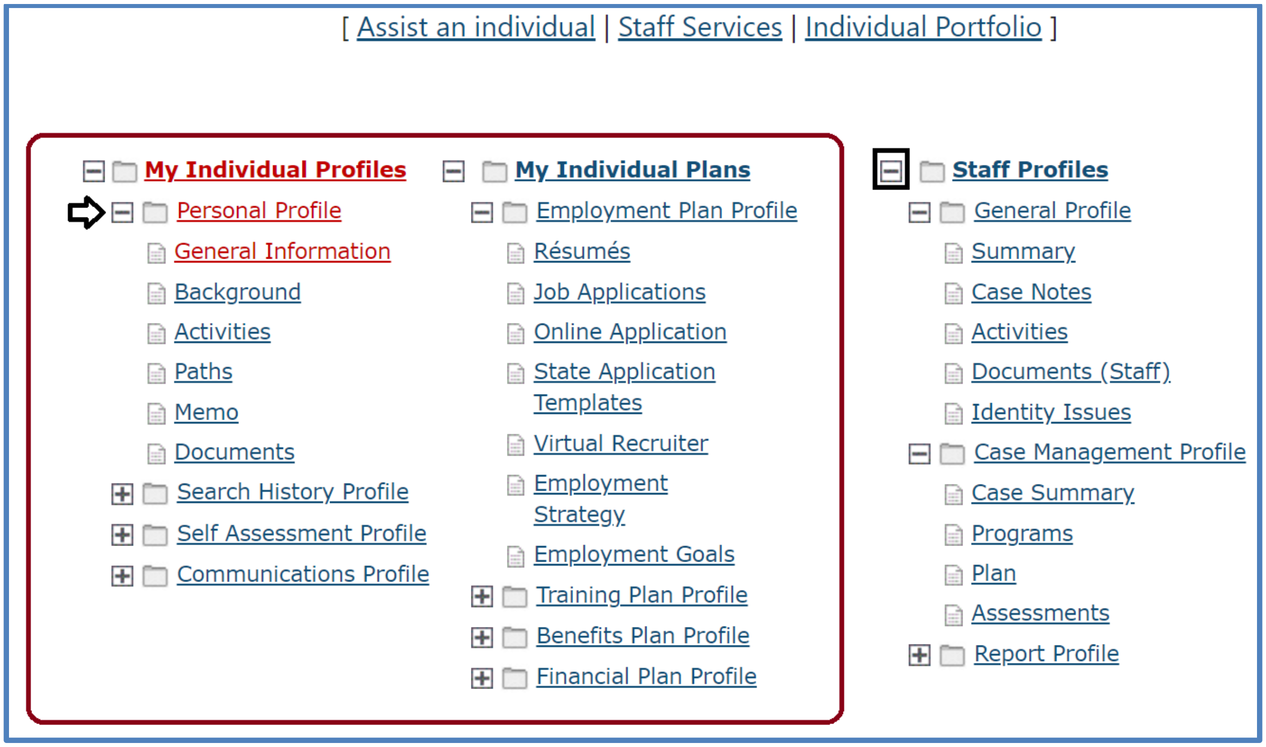


Currently Managing

- **Service Tracking: ON** (indicator) - 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.
- **Release Individual** - When finished working with an individual, select Release Individual from the Currently Managing menu group.

Individual Portfolio Folders

Individual Portfolio Folders are quick links to an individual's profiles and plans and are located at the top of the page when assisting an individual.



Individual Profile Folders

To view or modify the information in the individual's profiles and plans, click the name of the individual currently being assisted, under Currently Managing on the left side-bar menu.

My Individual Profiles

My Individual Profiles stores all the individual's personal information, keeps track of all searches they performed in the system, provides access to self-assessment tools, and lets them communicate with employers or others regarding their career interests.

Folders include:

- **Personal Profile**
    - **General Information** - Contact and profile information about the individual as recorded during system registration.
    - **Background** - Information that can be used in a résumé or application.
    - **Activities** - Self-evaluations and other assessments.
    - **Memo** - Blank memo text box where an individual can maintain reminder messages to themselves, or staff can write case notes.
    - **Documents** - A list of the individual's documents that have been uploaded to the system.
- **Search History Profile**
    - **Jobs** - Searches the individual made of viewed jobs.
    - **Employers** - Searches the individual made of viewed employers.
    - **Programs** - Lists training programs in which the individual has participated.
    - **Occupations** - Searches for specific occupations.
    - **Industries** - Searches for a specific industry.
    - **Areas** - Displays a list of areas previously viewed.

- **Self-Assessment Profile**

Use the individual's listed skills to search for occupations and jobs in the system that require those skills by clicking the Find Matching Occupations and Jobs button in each of the following sections:

  - **Job Skills** - Displays the job skills selected during registration.
  - **Personal skills** - Displays the personal skills selected during registration.
  - **Work Interests** - Displays the scores for the Work Interests and Work Interest Analyzer assessments, if taken.
  - **Work values** - Displays the scores for the Work Values and Work Values Analyzer assessments, if taken.
  - **Tools and Technologies** - Shows the typical tools and technology tools saved to the system, if any.
  - **Multiple** – Allows selection of multiple types of self-assessments and combines them to produce a list of occupations that match the selected skills during registration.

- **Communications Profile** - Contains tools to access and manage communications. Tools include:
  - **Messages** – Collects and stores system messages received, sent, saved, or removed.

- **Correspondence** - Lists information about the letters and correspondence created in the system.
- **Communication Templates** – Contains default templates, such as a cover letter for job seekers who are applying for jobs, or a rejection letter for employers who are reviewing job applicants. Also allows creation of new templates.
- **Subscriptions** - Displays System Alert messages received in your Message Center through your e-mail address or as a text message. System alerts are helpful messages and reminders that the system sends to users who have configured and requested alerts.
- **Email log** - Contains a list of email messages from the WIT system that have been sent or received. Use the drop-down list to filter between sent and received messages.

My Individual Plans

These following folders quickly display an individual's employment, training, benefits for which they may be eligible, and financial plan profiles.

- **Employment Plan Profile**
    - **Résumés** - Select to display all résumés that the individual has created in the system.
    - **Job Applications** - Select to display the applications and information about the jobs for which the individual has applied.
    - **Online Application Form** - Select to display a summary of saved background history used for pre-populating the system application when applying for jobs.
    - **State Application Templates** - Select to display a list of created State of Texas Applications. Allows for creating a new template or application.
    - **Virtual Recruiters** -Select to display the virtual recruiter job alerts set up in the system. Allows for creating new alerts.
    - **Employment Strategy** - Select to access a powerful tool and strategy to quickly find a new job nearby that matches the individual's background.
    - **Employment Goals** - Select to develop an Individual Employment Plan (IEP) and/or Service Strategy.

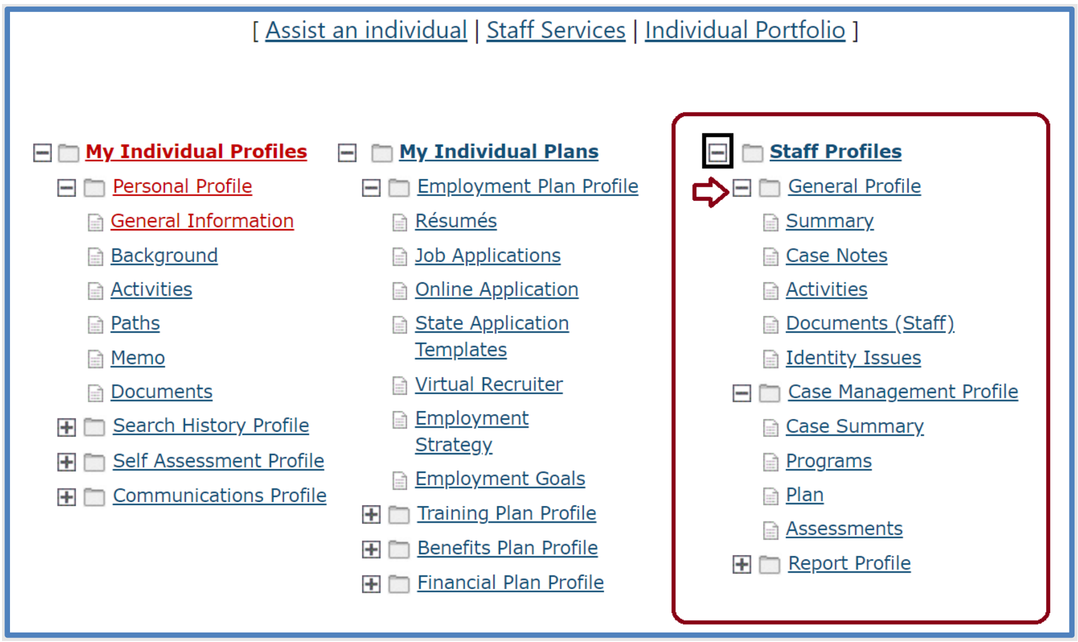
- **Training Plan Profile** - Displays information about classroom or online training in which an individual has participated. Folders include:
  - **Classroom Training** - Displays information about training activities that the individual has undertaken, typically through state or federal benefit programs, and allows the user to search for training providers or programs.
  - **Online Training** - Displays the online training courses that the individual has taken or are currently working on.
- **Benefits Plan Profile** - Access basic information on government benefits for which the individual may be entitled. Folders include:
  - **Workforce Innovation and Opportunity Act (WIOA)** – Provides an overview of the WIOA Adult and Dislocated Worker programs, as well as the WIOA Youth program.
  - **Trade Adjustment Assistance (TAA)** – Provides an overview of the TAA program with links to additional information.
  - **Other Benefits** - Includes a list of resources to local, state, and federal benefits for unemployment claimants, veterans, youth, and seniors.
- **Financial Plan Profile** - Provides tools for individuals to create overall budgets, training budgets, and transition budgets. Folders include:

- **Financial Literacy** - List of resources to manage personal funds.
- **Overall Budget** - Tools to create a budget for income and expenses.
- **Training Budget** - Tools to create a budget for training and a list of training resources.
- **Transition Budget** - Tools to create a transition budget that allows individuals to analyze expenses and income for a selected period and create a plan for a job transition.

Staff Profile Folders

When you are Currently Managing an individual or an employer, the Staff Profiles menu will display staff-specific folders.

Note: Only staff members can view this profile menu.



Staff Profile Folders

Staff profiles consist of the following folders:

- **General Profile** - Enables staff to review summary information on an individual, create case notes, or conduct Wagner-Peyser services.
    - **Summary** - Select to view general information about the individual through several summary panels and review an individual's background.
    - **Case Notes** - Select to create case notes pertaining to the individual in a central location no matter where they are created.

  - **Activities** - Select to review an individual's involvement in the Wagner-Peyser program.
  - **Documents (Staff)** - Select to interactively upload/import or scan documents into the system. Staff can attach an electronic document to a client's record.
  - **Identity Issues** – Select to review a summary of possible fraud indicators associated with an individual's account at the time of registration.
- **Case Management Profile** - Enables staff to manage services for various federal programs, create an Individual Employment Plan (IEP), and maintain recorded assessments. Folders include:
  - **Case Summary** - Select to display information about the individual through several summary panels. Allows staff to review an individual's background.
  - **Programs** - Select to display details of an individual's involvement in the TAA program. Allows staff to create and manage applications and enrollments for the individual in various programs.
  - **Plan** - Select to display a customer's career goals, skills assessments, and an IEP. This information provides a comprehensive plan or needs analysis that helps direct the types and number of program services provided to the individual.
  - **Assessments** - Select to create and manage assessments that can only be entered by staff (such as

Basic Skills Assessments - TABE Test and WorkKeys® tests).

- **Report Profile** - Allows staff to review an individual's tasks, system access, and assessments. Folders include:
    - **Tracking** - Select to review when an individual has accessed specific system components.
    - **Statistics** - Select to monitor an individual's site usage. Contains links to specific created items such as résumés and/or the Virtual Recruiter.
    - **Combined Assessment** - Allows staff to view and print assessments, both self-assessment and case management-related, all on one screen.
    - **Labor Exchange** - Maintains a list of dates and times employers viewed individual's résumés and provides access to employer and résumés details.

TAA Eligible Worker Layoff List

Training Objectives

After completing this lesson, you will be able to:

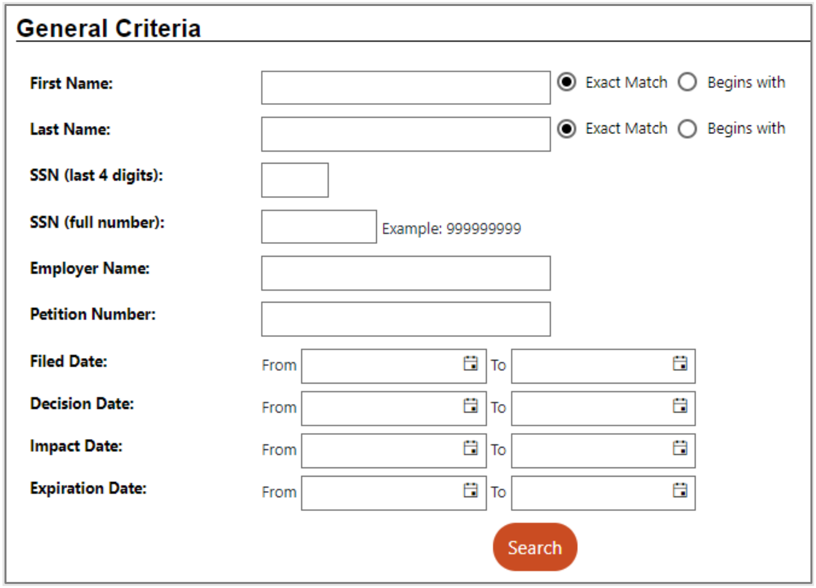
- Understand the role of a Trade petition.
- Identify where petition details are managed, and by whom.
- Navigate to the TAA Eligible Worker Layoff List.
- Search for a desired Trade-impacted worker.
- Assist the Individual.

For a Trade-impacted individual to receive TAA program services, a TAA petition must have been on file and approved by the USDOL. The State System Administrator user type enters Trade petition details through the WIT Administration system.

The Work in Texas system has been modified to include a list of TAA-eligible workers. Program staff must work from this list to ensure the applicant they're managing has experienced a qualified layoff for Trade program services consideration.

To access this list, staff perform the following steps:

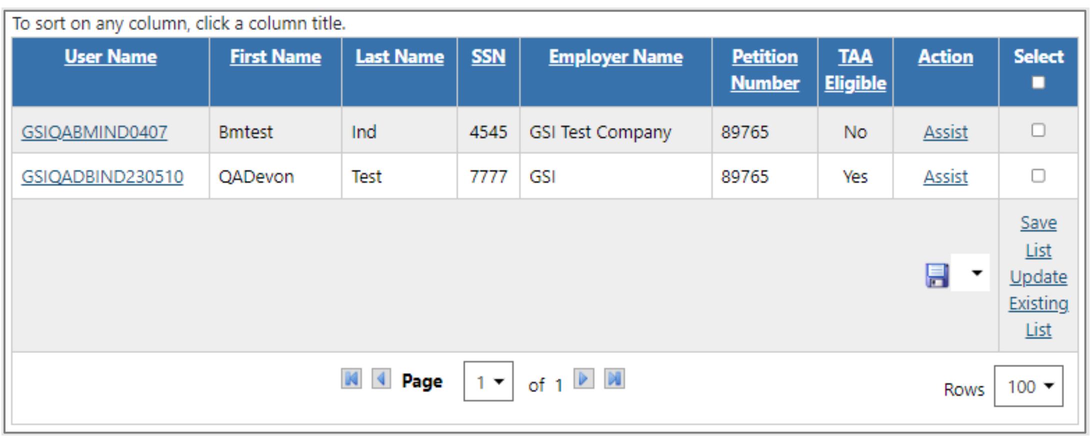
1. Access **Manage Individuals > TAA Eligible Worker Layoff List** from the left navigation menu.



TAA Eligible Worker Layoff List Search Screen

2. Enter search criteria and click **Search**.

3. From the list of match results, click the **Assist** link for a desired individual.


To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Employer Name	Petition Number	TAA Eligible	Action	Select
GSIQABMIND0407	Bmtest	Ind	4545	GSI Test Company	89765	No	Assist	
GSIQADBIND230510	QADevon	Test	7777	GSI	89765	Yes	Assist	
								Save List Update Existing List

Page 1 of 1 Rows 100

TAA Eligible Worker Layoff List Search Results Screen

Note: If the individual has not yet registered in the WIT system, State staff may select the **Create** link that will be displayed for the individual, assuming they have already been associated with the TAA petition in the WIT Administration system.

Trade Program Application

Training Objectives

After completing this lesson, you will be able to:

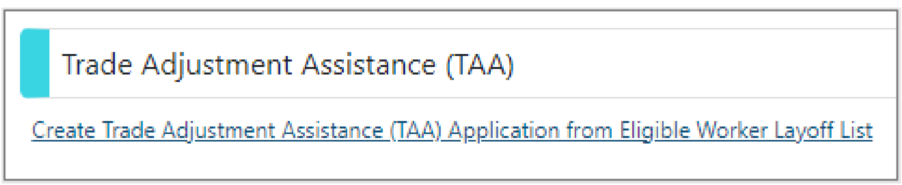
- Perform data entry on a step-by-step basis to complete the TRADE application wizard.
- Recognize TRADE application navigation tools, such as how the wizard form functions, the Exit Wizard link, page validation processes, required fields, document upload options, verification steps, conditional fields, Closed Never Enrolled, and the Progress Bar.
- Enter eligibility dates successfully.
- Recognize the system can pre-populate some fields in the application from information previously entered.
- Verify applicant information and attach verification documents to the individual's account profile.

The TAA Application Form collects data to determine an individual's eligibility for the federal TAA/ATAA programs. Staff complete the TAA Application following a wizard format. The wizard progresses through multiple steps/screens that prompt staff to enter required data. When the application is complete, the system sets the individual's eligibility status for TAA/ATAA programs.

Staff privileges and system business rules may determine which of the activities and features discussed in this guide are available in each customer's TAA module. For example, based on system configuration, some data created from other federal program applications may pre-populate application fields (e.g., SSN verification, demographic data, and employment data).

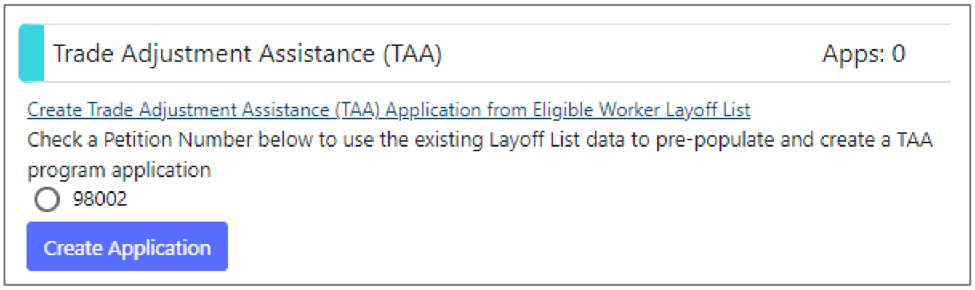
To launch the TAA Application Wizard:

1. From the Services for Workforce Staff menu group, click **Manage Individuals > Assist an Individual** to search for, or select, the individual to assist.
2. In the folder tree area at the top of the page, click **Staff Profiles > Case Management Profile >Programs.**
3. Scroll down to the Trade Adjustment Assistance (TAA) section and click the **Create Trade Adjustment Assistance (TAA) Application from Eligible Worker Layoff List** link.



Create Trade Adjustment Assistance (TAA) Application from Eligible Worker Layoff List Link

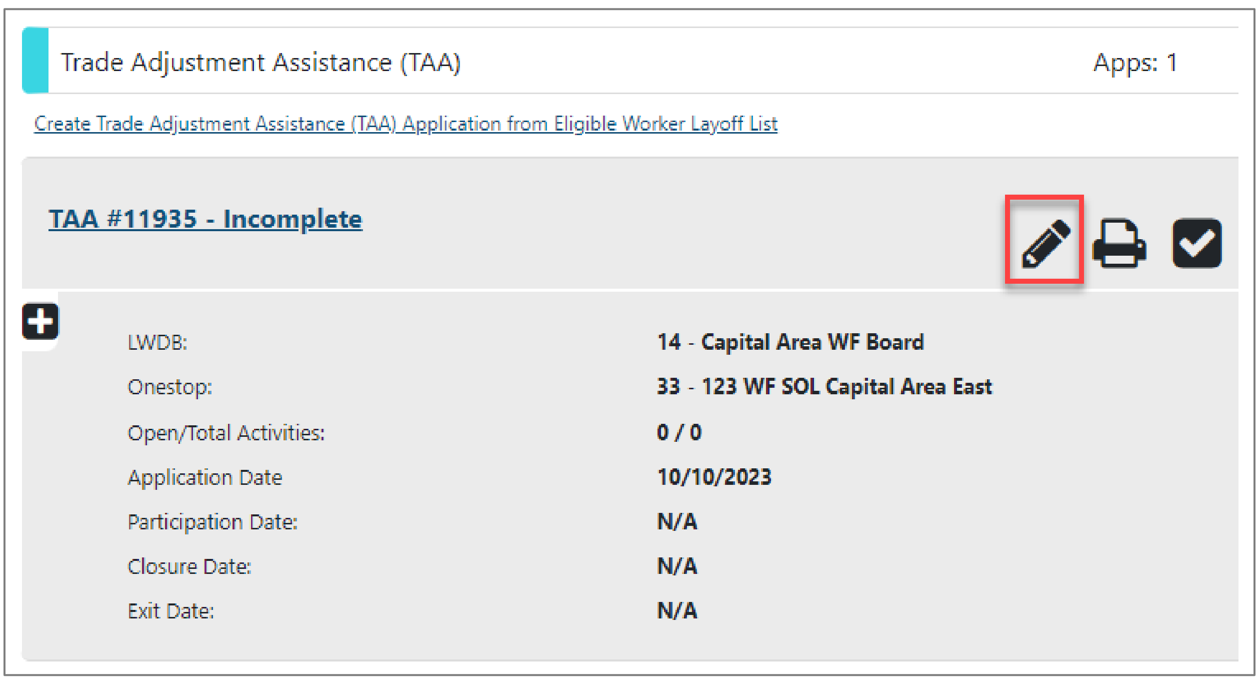
4. In response the system adjusts the screen to display new information. To launch the TAA Application form, select the radio button displayed for the corresponding TAA petition and select **Create Application**.



Select TAA Petition Number and Create Application Prompts

> **Note:** If the individuals have not yet been associated with the TAA petition, staff may not create the TAA application.

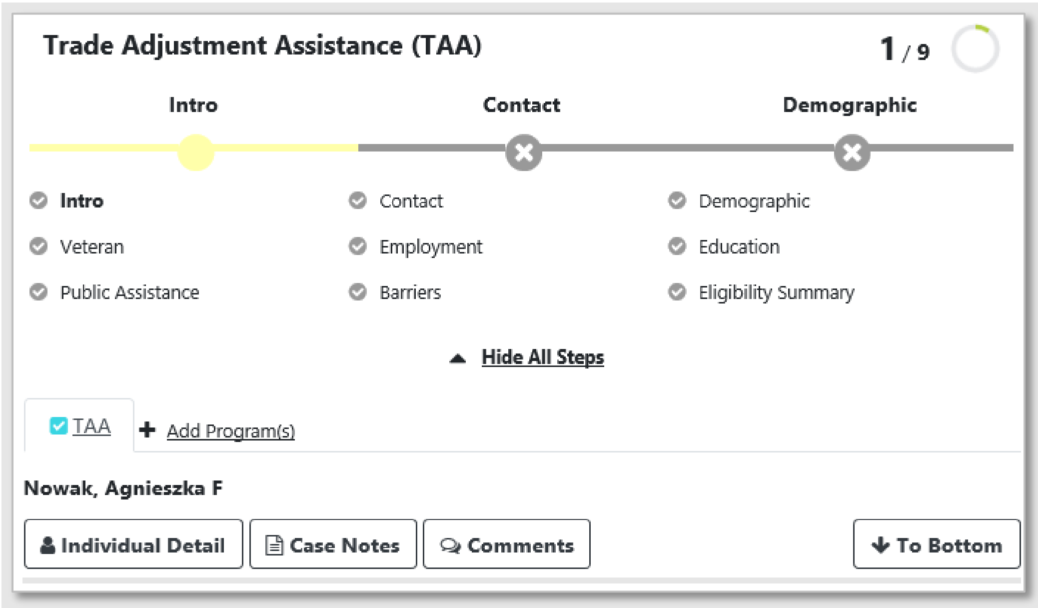
5. In response, the system will update the screen to display an incomplete TAA program application. Click the pencil icon to continue, as shown below.



TAA Program Area Displaying Incomplete Application Status

Navigating the Application Wizard

The following information will help you use the Application Wizard successfully.

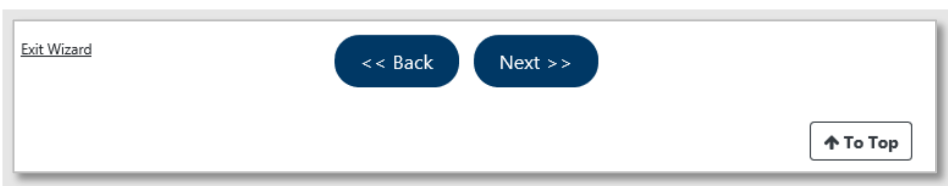


TAA Application Wizard Progress Bar and List of Steps

- The application wizard highlights the first step, Intro. A progress bar remains at the top of the application through all steps to show progress. To hide the list of steps, click the **Hide All Steps** link; the progress bar remains. To re-display the steps, click the **Show All Steps** link.
- The current step displays as bold with a yellow solid circle on the progress bar; completed steps are green with a check mark in the circle; and incomplete steps are grey with an X in the circle. Once a step has been completed, the step name becomes a link that can be used to navigate to that page.
- To display key details about the individual such as **Username**, email address, and phone number, click the Individual Detail

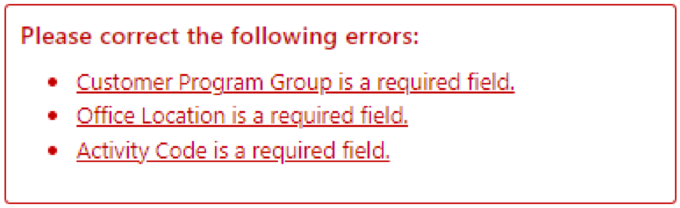
button located below the individual's name. Click the **Close Individual Detail** button to close the details display.

- To save data and advance to the next step in the application, click the **Next** button at the bottom of the page. While the system is Validating and Saving Data, Updating Wizard, and Redirecting to the next step, a progress bar of these activities displays at the bottom of the page.
- Use the **Back** button to return to the previous step.
- Clicking the **Exit Wizard** link located at the bottom of each page exits the application. Data on the current page is not saved; only data entered through the previous page is saved. Exiting in this manner before the final step is saved, will result in an **Incomplete** application.



Buttons and Links Available at the Bottom of Every TAA Application Wizard Page

- Fields marked with a red asterisk are required fields. If an entry is missing in one or more of these fields when the Next button is clicked, the system displays at the top of the screen a message in red text bullets indicating which data is missing. Complete the field(s) and click the **Next** button to proceed.

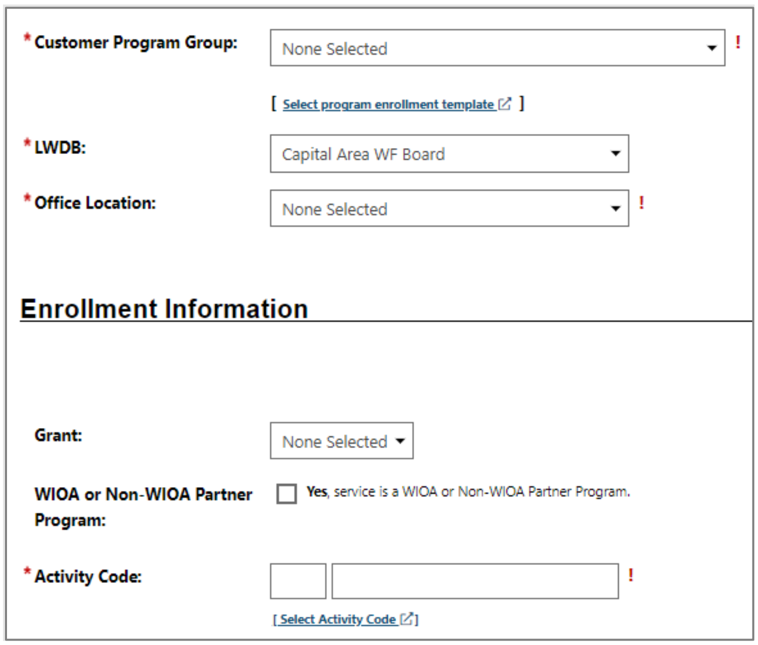


Please correct the following errors:

- Customer Program Group is a required field.
- Office Location is a required field.
- Activity Code is a required field.

Sample Notification of a Missing Required Field

- The corresponding error fields display a red exclamation mark to the right of the field.



*Customer Program Group: None Selected !

[Select program enrollment template]

*LWDB: Capital Area WF Board

*Office Location: None Selected !

Enrollment Information

Grant: None Selected

WIOA or Non-WIOA Partner Program: Yes, service is a WIOA or Non-WIOA Partner Program.

*Activity Code: !

[Select Activity Code]

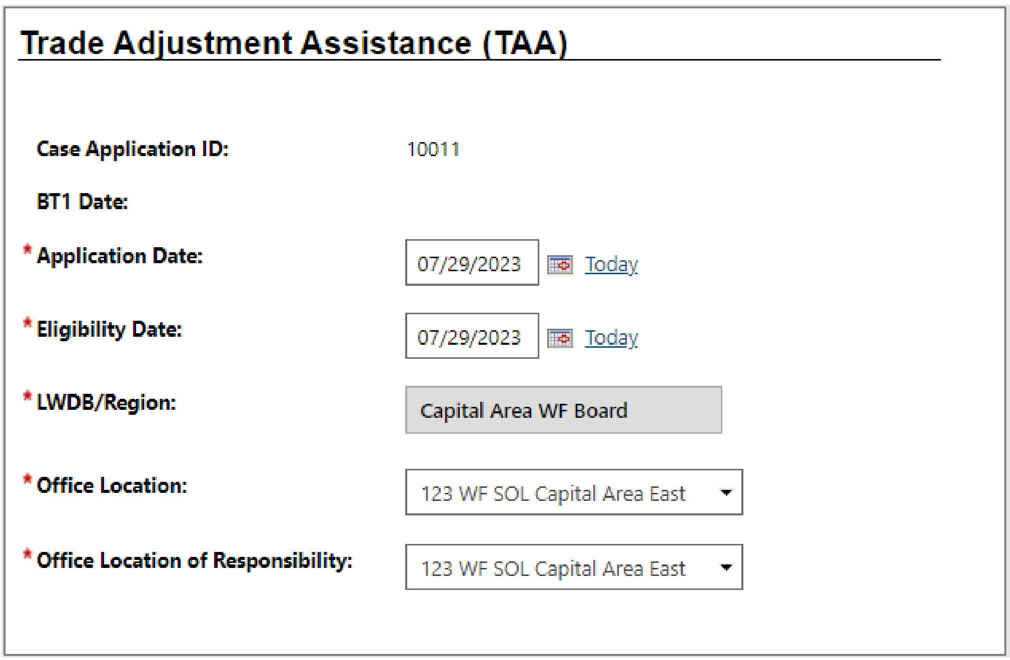
Sample Notification of an Unacceptable Entry in a Data Field

Completing the TAA Application Wizard

Intro Page

The Intro page is largely prefilled with data previously saved in the system. Staff's primary task on this page is to enter the Eligibility Date.

Note: The checkbox, Closed Never Enrolled, remains active during the application, and until an enrollment is made.


Trade Adjustment Assistance (TAA)

Case Application ID: 10011

BT1 Date:

* Application Date: 07/29/2023 Today

* Eligibility Date: 07/29/2023 Today

* LWDB/Region: Capital Area WF Board

* Office Location: 123 WF SOL Capital Area East

* Office Location of Responsibility: 123 WF SOL Capital Area East

TAA Application Wizard – Intro Page

To complete the Intro page:

1. Confirm the prefilled **Application Date** is accurate.
2. Enter the **Eligibility Date** for the TAA program.

Note: Application Date and Eligibility Date cannot be greater than 15 days ago (aka, the system's lockdown dates), and the Application Date cannot be greater than the current date. If a date entered does not meet this requirement, a notification in red displays below the date field.

3. 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

Many of the fields on the Contact page are prefilled with information already saved in the system.

TAA Application Wizard – Contact Page

To complete the Contact page:

1. Confirm and modify fields, as appropriate.
2. Verify the Social Security Number.
    i. Click the **Verify** link for SSN Verify. A list of SSN verification documents displays.

ii. Select the document used to confirm the social security number and click **Verify** again to hide the list.

iii. (Optional) Use the **Scan**, **Upload**, or **Link** hyperlink to attach the document to the application.

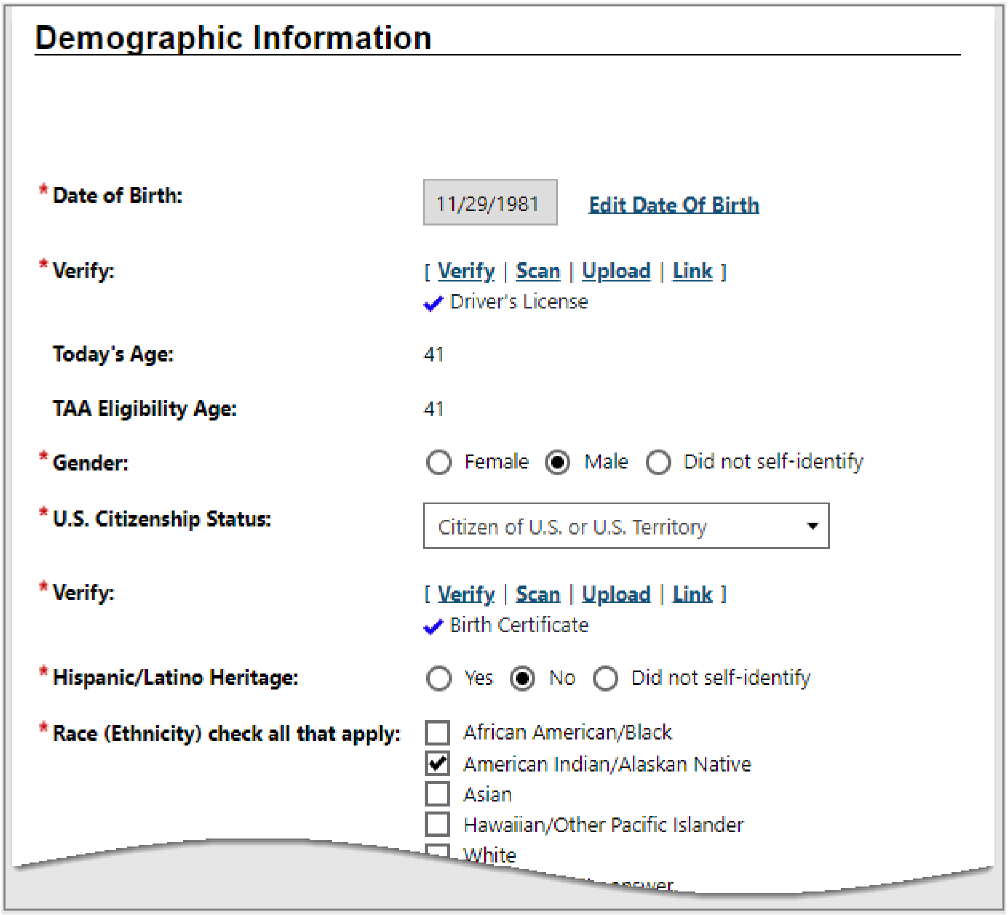
Note: Data in other sections, such as address and phone information, is prefilled with data previously saved. Review and add or adjust data, as appropriate.

3. (Optional) Select the **Add New Contact** link to create record(s) for contact persons known to the applicant.

4. Click the **Next** button to save the data and advance to the Demographic page.

Demographic Page

Many of the fields on the Demographic page are prefilled with information previously saved in the system.



TAA Application Wizard – Demographic Page

To complete the Demographic page:

1. Verify the Date of Birth.

    i. Click the **Verify** link for Verify. A list of date of birth verification documents displays.

    ii. Select the document used to confirm the DOB and click **Verify** again to hide the list.

iii. (Optional) Use the **Scan**, **Upload**, or **Link** hyperlinks to attach the document to the application.

2. Confirm and modify prefilled fields, as appropriate.
3. Select whether the individual is Considered to have disability. Selecting Yes activates a list of disability categories.

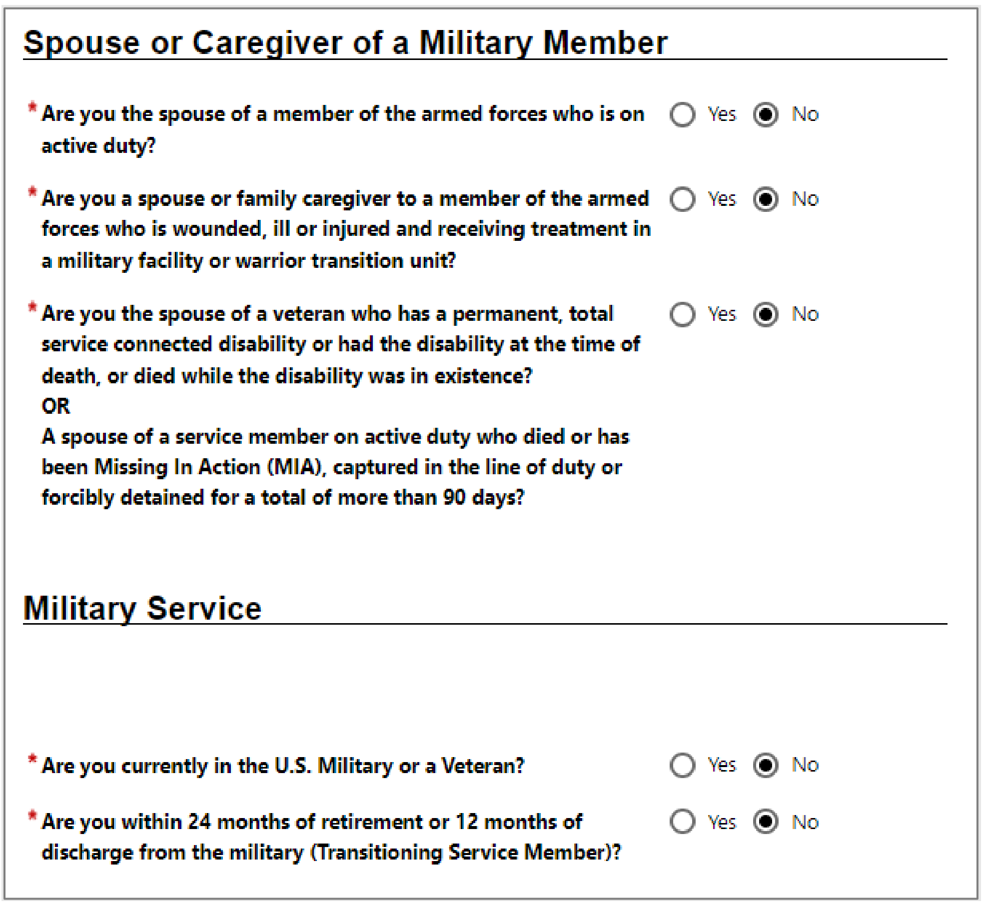
   i. Select one or multiple disabilities for the Category of Disability.

   ii. Select whether the individual has Received Services from Vocational Rehabilitation.

4. Click the **Next** button to save the data and advance to the Veteran page.

Veteran Page

The questions on the Veteran page default to No even if the individual was identified as a veteran meeting the same criteria on other program applications in the system. Selecting Yes for a question may activate additional questions and/or deactivate other selections. For example, selecting Yes to Are you within 24 months of retirement or 12 months of discharge from the military, disables the next two questions and adds questions regarding Transitioning Service Members.



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

* Are you within 24 months of retirement or 12 months of discharge from the military (Transitioning Service Member)? Yes No

TAA Application Wizard – Veteran Page

To complete the Veteran page:

1. Confirm and modify the Yes/No selections as needed.

2. Make the appropriate selections for Transitioning Service Members or General Veteran Information items that display for certain Yes responses.

3. If completing the General Veteran Information section, verify the veteran's record.

   i. Click the **Verify** link. The list of Military Service Verification documents displays.

   ii. Select the document used to confirm the veteran's service and click **Verify** again to hide the list.

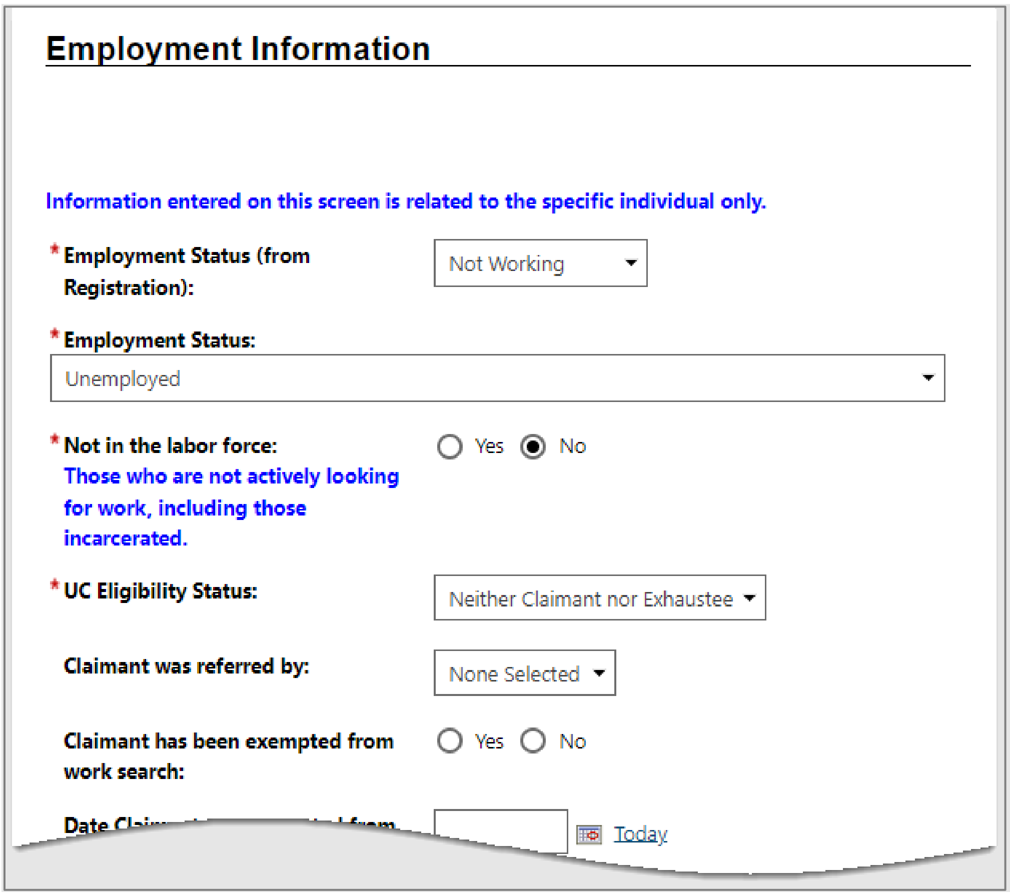
   iii. (Optional) Use the **Scan**, **Upload**, or **Link** hyperlinks to attach the document to the application.

   iv. If the individual has no record available, use the Obtain DD214 link to access the National Archives website to request documentation of military service.

4. Click the **Next** button to save the data and advance to the Employment page.

Employment Page

The Employment step collects information regarding the individual's employment status and employment history, including information about the relevant TAA petition and employer. Fields in the Employment Information and Individual Employment History sections are prefilled with information previously saved in the system.



TAA Application Wizard – Employment Page

To complete the Employment page:

1. Confirm and modify as needed, the prefilled Employment Status fields.

2. If the UC Eligibility Status is Claimant or Exhaustee, verify this status.

    i. Click the **Verify** link. A list of Unemployment Compensation Verification methods displays.

    ii. Select the document or method used to confirm the individual's UC status and click **Verify** again to hide the list.

    iii. (Optional) Use the **Scan**, **Upload**, or **Link** hyperlinks to attach the document to the application.

3. If the individual is a Claimant, select a response for the Claimant was referred by field.

4. Confirm and modify, as appropriate, the items regarding exemption from work search.

5. Select Yes or No for whether the individual Attended a Rapid Response Orientation.

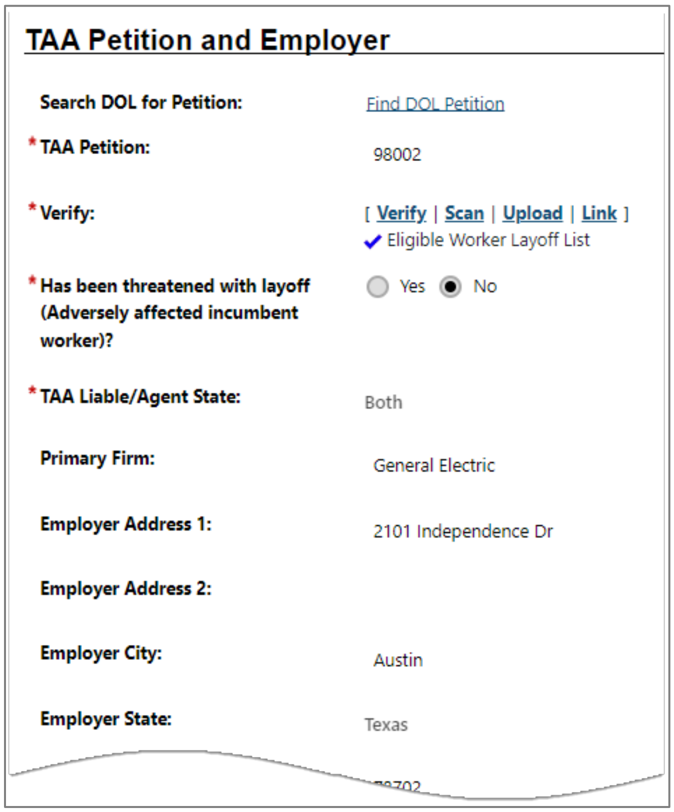
    i. If Yes, use the **Find RR Event** link to search for and select the appropriate Event.

6. If the individual completed the Background Summary on their profile, the Individual Employment History section lists that employment history.

7. To add to the previous employment history, click the **Add Employment History** link. The employment information entered here also saves to the individual's profile.

TAA Petition and Employer and TAA Re-Employment Sections

For an individual to receive TAA services, a TAA Petition must already be filed with the office by the employer. Administrators enter Petitions through the Administration module, so the correct petition number should already be displayed.



TAA Application Wizard – Employment Page: TAA Petition Information Section

1. The system will display the TAA Petition number already on file in the system for the individual currently assisted.
2. Confirm the TAA Petition applies to the individual.
   i. The TAA petition number displays as read-only.

ii. Eligible Worker Layoff List displays as the selected verification reason.

iii. The related, required fields (for example, Has been threatened with layoff and TAA Liable/Agent State) are pre-filled.

3. Enter the Hours Per Week, Employment Begin Date, Dislocation Hourly Wage, and Average Weekly Wage.

4. In the remaining fields, confirm the following:

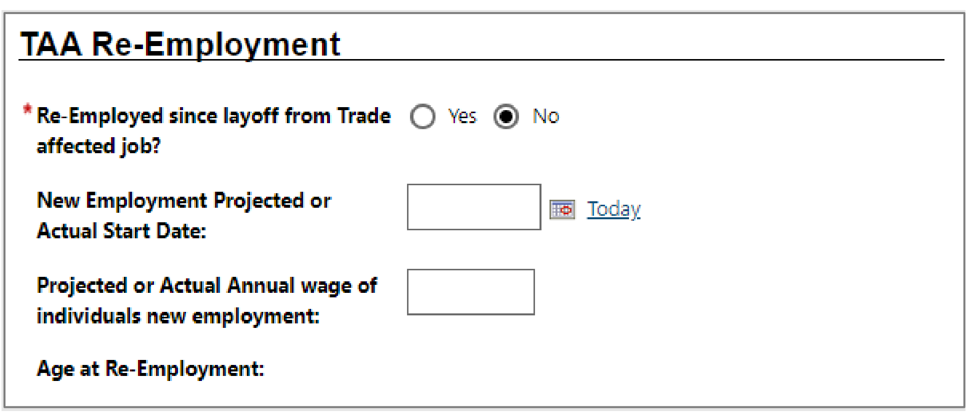
   i. Verification reason displays.

   ii. Type of separation displays.

   iii. Reason for Separation displays.

   iv. A valid Separation Reason has been entered displays.

5. In the TAA Re-Employment section, select Yes or No to indicate whether the individual has been re-Employed since layoff from the Trade affected job.


TAA Re-Employment

* Re-Employed since layoff from Trade affected job? Yes No

New Employment Projected or Actual Start Date: Today

Projected or Actual Annual wage of individuals new employment:

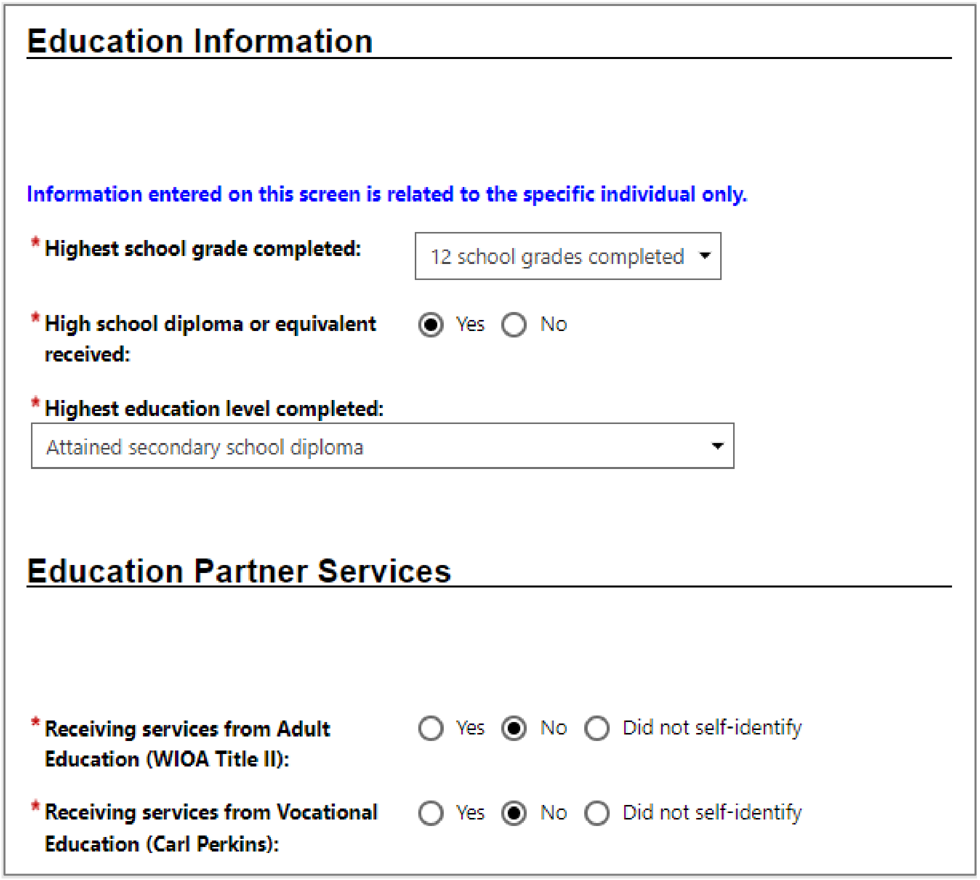
Age at Re-Employment:

TAA Application Wizard – Employment Page: TAA Re-Employment Section

i. If Yes, enter the New Employment Projected or Actual Start Date of their re-employment and Projected or Actual Annual wage. The system automatically populates the Age at Re-Employment field.

6. Click the **Next** button to save the data and advance to the Education Information page.

Education Information Page



Education Information

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

* Highest school grade completed: 12 school grades completed

* High school diploma or equivalent received: Yes No

* Highest education level completed: Attained secondary school diploma

Education Partner Services

* Receiving services from Adult Education (WIOA Title II): Yes No Did not self-identify

* Receiving services from Vocational Education (Carl Perkins): Yes No Did not self-identify

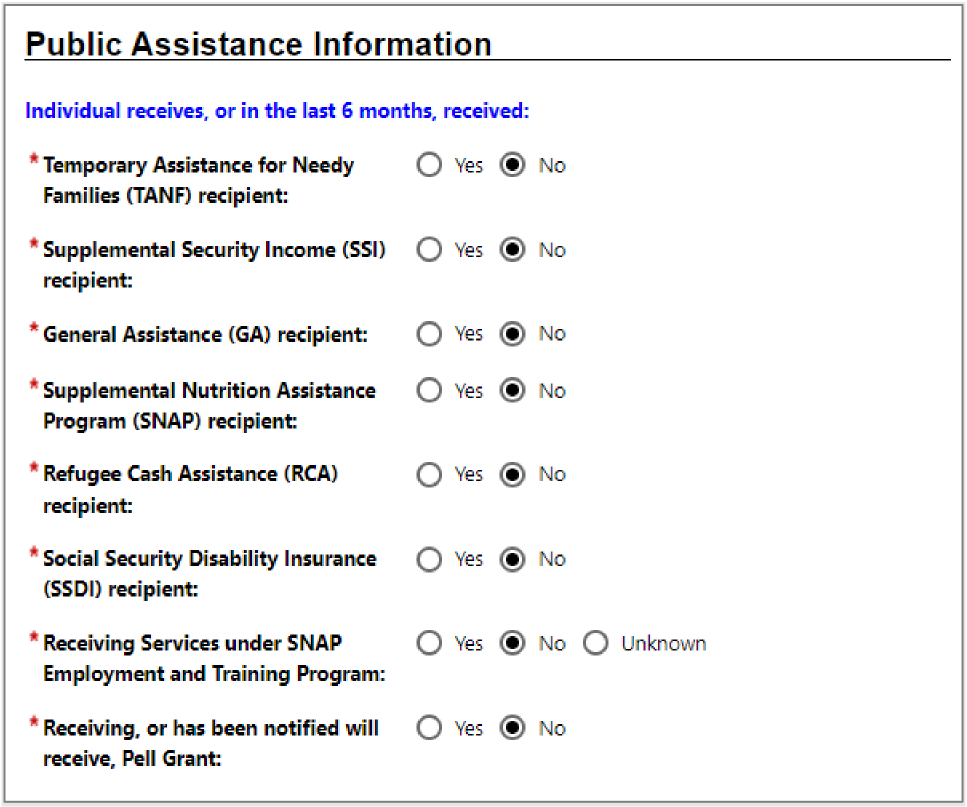
TAA Application Wizard - Education Information Page

To complete the Education page:

1. Select the Highest school grade completed by the individual.
2. Specify if they received a High School diploma or equivalent.
3. Select the Highest education level completed.
4. Specify if they are Receiving services from Adult Education (WIOA Title II) or services from Vocational Education (Carl Perkins).

5. Click the **Next** button to save the data and advance to the Public Assistance page.

Public Assistance Page



Public Assistance Information

Individual receives, or in the last 6 months, received:

*Temporary Assistance for Needy Families (TANF) recipient:	Yes	No	
*Supplemental Security Income (SSI) recipient:	Yes	No	
*General Assistance (GA) recipient:	Yes	No	
*Supplemental Nutrition Assistance Program (SNAP) recipient:	Yes	No	
*Refugee Cash Assistance (RCA) recipient:	Yes	No	
*Social Security Disability Insurance (SSDI) recipient:	Yes	No	
*Receiving Services under SNAP Employment and Training Program:	Yes	No	Unknown
*Receiving, or has been notified will receive, Pell Grant:	Yes	No	

TAA Application Wizard - Public Assistance Information Page

To complete the Public Assistance page:

1. Select the appropriate radio button to indicate any public assistance the individual is currently receiving or received in the last 6 months (Choices, SSI, General Assistance, SNAP, RCA, SSDI, Services under SNAP Employment and Training, or Pell Grant).

2. Click the **Next** button to save the data and advance to the Barriers page.

Barriers

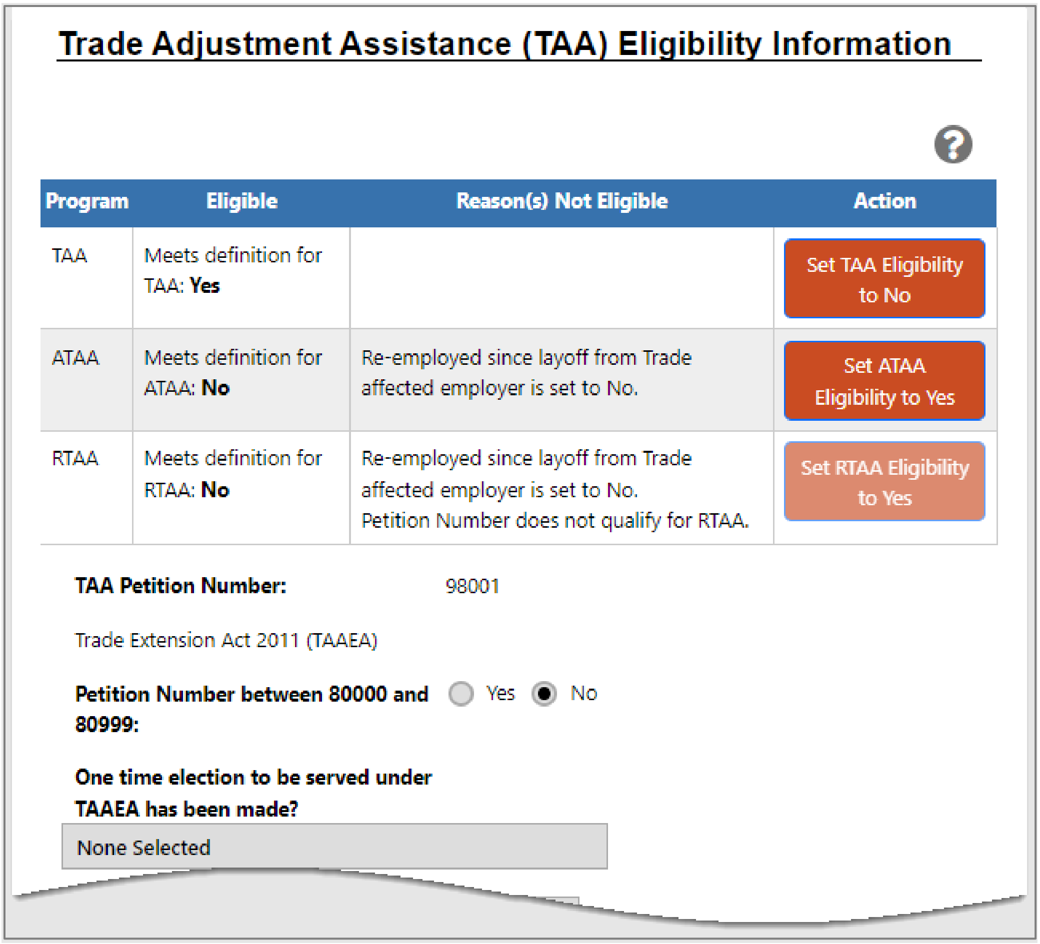
TAA Application Wizard - Individual Barriers and Barriers to Employment Page

To complete the Barriers page:

1. Select the correct radio button to indicate a barrier due to limited reading, speaking, or writing skills, or understanding of the English language.
2. Select whether the individual is a single parent.
3. Click **Next** to determine eligibility on the Eligibility Summary page.

Eligibility Summary Page

This Eligibility Information page displays the applicant's eligibility status for TAA, ATAA, and RTAA (as shown in the figure below). Where the eligibility is No, one or more reasons are listed in the Reason(s) Not Eligible column.



TAA Application Wizard - Eligibility Summary Page

To complete the TAA application:

1. Review the screen for the individual's eligibility for TAA, ATAA, and RTAA, including the TAA Calculations table to see any applicable TAA dates as well as Job Search Allowance and Job Relocation Allowance data.

Notes: TAA eligibility is based on the Eligibility Date or Qualifying Separation Date being within the valid date range for the selected TAA Petition (indicated in previous application tabs).

ATAA and RTAA are separate parts of TAA, designed for older participants. Additional checks are made for the client's birth date (must be 50 or older), and if they have been reemployed since being laid off. There is also a salary cap—the applicant cannot earn more than $50,000 annually in their new job.

The eligibility override buttons available from the Action column are not configured for the WIT system, so staff are encouraged to ignore these buttons.

2. Enter all required information, specifying:

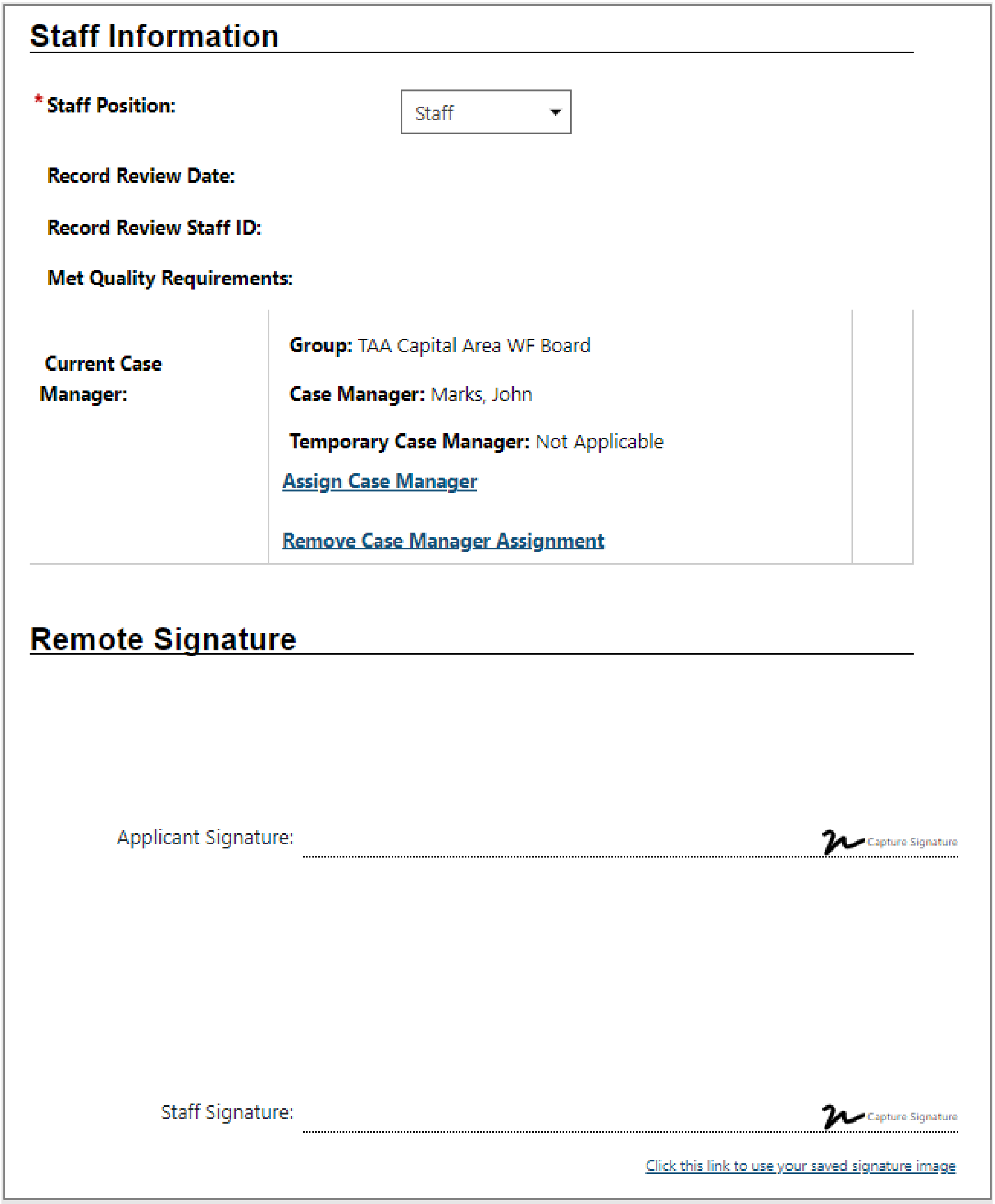
    i. if they have received a benefit under a prior TAA certification in the last 10 fiscal years.

    ii. Whether a referral to WIOA was completed.

    iii. If the individual declined WIOA enrollment.

    iv. Your Staff Position.

Note: The system will automatically assign as the case manager the staff person who completed the application.



TAA Application Wizard - Eligibility Summary Page - Staff Information and Signature

3. Select any other optional tasks:

    i. Include Staff Signature and Applicant Signature to add digital signatures. For more information, see the Working with Existing IEP Plans topic later in this guide.

ii. Print the TAA application form.

4. Click **Finish** to complete the application. A Finish Application confirmation pop-up window displays, indicating that the completed TAA application has been saved. It offers two choices of what to do next: return to the Programs tab or continue with the creation of a TAA Participation record.
5. If prepared to provide the first service, click on the Participation link; if not, go back to the Programs tab.

Viewing the TAA Application

Once the TAA application has been successfully completed, a link will display for the application in the Trade Adjustment Assistance section of the Programs tab, indicating it is Complete.

Programs Tab: TAA Application Area

- To view the sections of the application in read-only mode, click the **Complete** link on the left.
- To edit the application data in the wizard, click the **pencil icon** on the right.

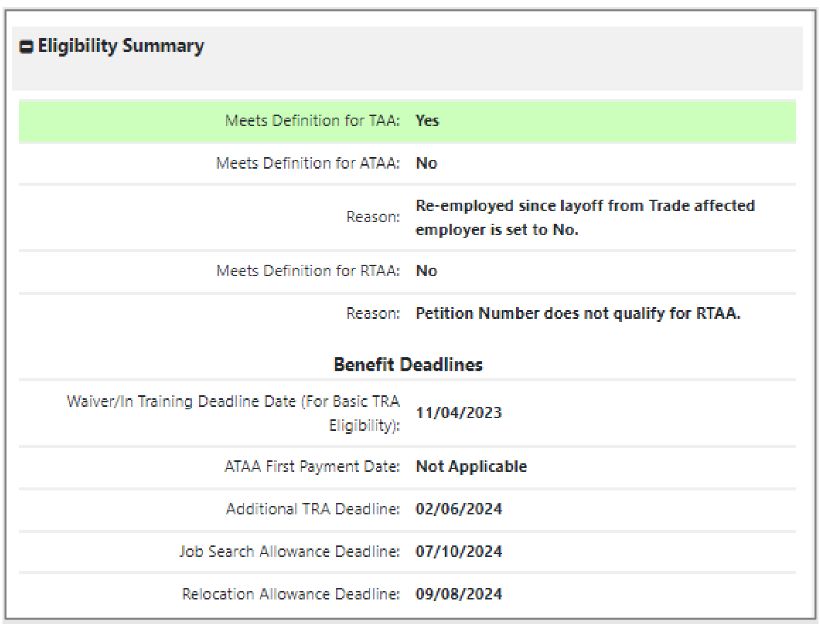
Trade Eligibility Summary Ribbon

Training Objectives

After completing this lesson, you will be able to:

- Utilize this system feature to confirm critical dates for the individual.
- Apply this information to ensure the timely management of required data entry and form management.

To see the TAA Calculations, which lists critical Certification and Separation dates related to the application, click the **plus sign icon** on the left to open and expand the TAA program area, then click the **Eligibility Summary** bar.



Eligibility Summary

Meets Definition for TAA:	Yes
Meets Definition for ATAA:	No
Reason:	Re-employed since layoff from Trade affected employer is set to No.
Meets Definition for RTAA:	No
Reason:	Petition Number does not qualify for RTAA.

Benefit Deadlines

Waiver/In Training Deadline Date (For Basic TRA Eligibility):	11/04/2023
ATAA First Payment Date:	Not Applicable
Additional TRA Deadline:	02/06/2024
Job Search Allowance Deadline:	07/10/2024
Relocation Allowance Deadline:	09/08/2024

Programs Tab: TAA Eligibility Summary Area

Trade Participation Ribbon

Training Objectives

After completing this lesson, you will be able to understand:

- how to access the Participation Form and what it is used for.
- The relationship between the Participation Form and the first service creation.

Staff must complete the participation form to officially declare enrollment in the program. Most of the required data on this form is prefilled, based on previously entered information. Upon successful completion of the TAA Participation form, the system will display the next mandatory step – TAA Enrollment.

To create a TAA Participation record:

1. From the Individual's Programs tab, in the Trade Adjustment Assistance section, click the **plus sign icon** to expand it and scroll down to the Participation bar.
2. Click on it to expand it, then click the **Create Participation** link. The TAA Participation form displays with participant general information prefilled.
3. Enter the Participation Date.

General Information

State ID: 8510

Individual has not provided a valid SSN.

Name: Jack Skellington

Date of Birth: 11/29/1981

Application Date: 07/29/2023

Eligibility Date: 07/29/2023

Participation Information

* Participation Date: 07/29/2023 (mm/dd/yyyy) Today

Participation Age: 41

TAA Participation Form

4. Click **Next** to continue to the Enrollment form.

Note: The Participation Date becomes locked down once saved, so the date entered should represent the participant's initial activity or service that you will manually enter in the next step.

If you exit the Enrollment form before saving data on the first tab, the Participation record will not be saved.

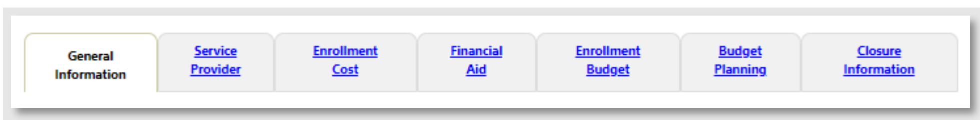
Trade Activities, Enrollments, Services Ribbon

Training Objectives

After completing this lesson, you will be able to:

- Create program enrollment records.
- Edit program enrollment records.

This form is a series of tabs for recording each activity in the TAA participant's service record. Each entered service is displayed in a table with completion status, begin and end dates, and links to view or modify the existing activity.



TAA Service Enrollment Form Tabs

Note: The individual must have a Participation Date recorded before an Enrollment activity can be created.

To create a TAA Service Enrollment record:

1. From the Individual's Programs tab, in the Trade Adjustment Assistance section, click the **plus sign icon** to expand it and scroll down to the Activities / Enrollments / Services bar.
2. Click on it to expand it, then click the **Create Activity / Enrollment / Service** link.

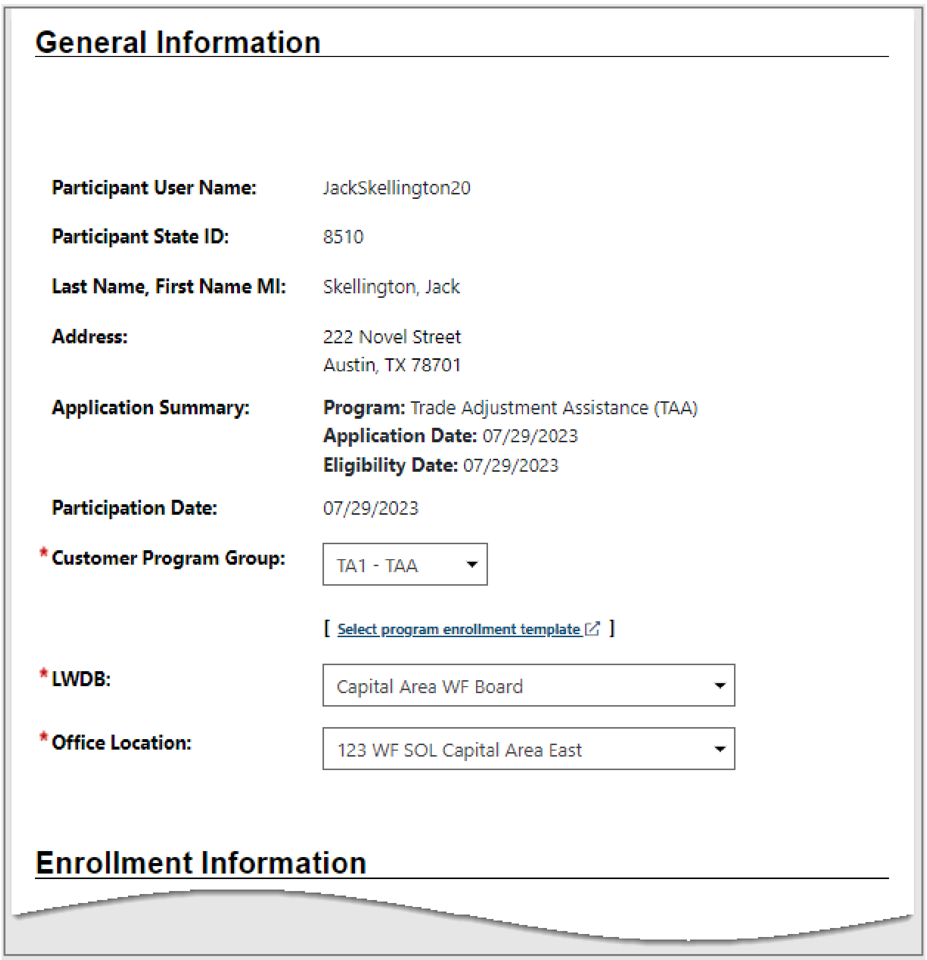
The TAA Activity Enrollment form displays with participant information prefilled on the General Information tab.

General Information Tab

1. In the General Information area, select the appropriate Customer Program Group. The choices displayed result from program eligibility determined during the TAA application process.

2. Select the staff member LWDB region.

3. Select the staff member Office Location.



General Information

Participant User Name: JackSkellington20

Participant State ID: 8510

Last Name, First Name MI: Skellington, Jack

Address: 222 Novel Street
Austin, TX 78701

Application Summary: **Program:** Trade Adjustment Assistance (TAA)
Application Date: 07/29/2023
Eligibility Date: 07/29/2023

Participation Date: 07/29/2023

*Customer Program Group: TA1 - TAA

[Select program enrollment template]

*LWDB: Capital Area WF Board

*Office Location: 123 WF SOL Capital Area East

Enrollment Information

TAA Enrollment Form - General Information Tab

4. (Optional) In the Enrollment Information area, specify whether this activity service falls under a WIOA or Non-WIOA Partner Program.

    i. If Yes, the page will refresh. From the **Select Partner** drop-down list, select the desired program name.

Note: Selected Partner Program agencies fund activity services; therefore, no fund tracking will occur in the system for these selections.

5. Click the **Select Activity Code** link and choose the desired program activity or service from the list displayed in a pop-up window.

Note: The initial TAA enrollment may be reduced to **102 Initial Assessment**. The system relies on critical data relationships (customer program group, LWDB, provider type) to determine which service activities staff may select from. In the case above, the TAA Application determined TAA eligibility only, so the system won't display ATAA-specific activity services.

6. Enter the activity's Actual Begin Date or Projected Begin Date.

Note: This date is locked down for the initial activity and reflects the Participation Date recorded previously.

7. Enter the activity's Projected End Date.

8. If this is a training activity, complete all known or required fields that follow.

9. In the Staff Information area, select the staff member **Position**, if applicable.

10. To perform case assignment, click **Assign Case Manager**, **Assign Me**, or **Remove Case Manager Assignment**.

11. Enter any comments, if necessary.

12. Click to **Add a new Case Note**, if necessary.

13. Review all data and click **Next** to save the data and proceed to the next tab.

Note: If you click Next, the data is saved, and you cannot change the Activity Code, Region, or Customer Group after that. If you click Exit Wizard, all changes on the current tab will be lost. If this is the first tab for the first enrollment activity (General Information), the Participation Record will also not be saved.

Service Provider Tab

1. Click the links to select the required service provider and service data (as shown in the figure below).

   i. **Select Provider** to choose the appropriate service provider.

   ii. **Select Service, Course or Contract** to define the selected activity.

   iii. **Select Provider Locations** to record where the individual will be serviced.

   iv. **Select Provider Contacts** to record the contact person associated with the activity service/course.

   v. **Occupational Training Code** to search for and select the desired occupational code. (This is only required for training activities.)

Enrollment Service Provider Information

Enrollment Summary:

Enrollment ID: 64
Username: JackSkellington20
TAA Application ID: 10011
Activity Code: 102 - Initial Assessment
Activity Dates: 7/29/2023 - 7/29/2023

* **Provider:**

4

Sample Office Services Provider

[Select Provider]

* **Service, Course or Contract:**

9

102 - Initial Assessment

[Select Service, Course or Contract]

Provider Locations:

4

Sample Office Services Provider

963 Alamo St
Austin, TX 78702

[Select Provider Locations]

Provider Contacts:

3

Marianne Gonzalez

[Select Provider Contacts]

* **Occupational Training Code:** Not Applicable

TAA Enrollment Form – Enrollment Service Provider Tab

Note: The numbers displayed for each selection are identification codes and may not necessarily be maintained.

For services that require an Occupation Code, an Occupational Training Code link appears to view and select the O*NET codes.

2. Click **Next** to save the data and proceed to the next tab.

Note: The Enrollment Cost Tab, Financial Aid tab, Enrollment Budget tab, and Budget Planning tab screens are required for program services flagged as fundable. The system's fund tracking module tracks all fundable services but is reserved for future use. This means the system will bypass these funding-related screens and display the final tab screen titled Closure Information.

Enrollment Cost Tab

This tab screen is reserved for future use.

Financial Aid Tab

This tab screen is reserved for future use.

Enrollment Budget Tab

This tab screen is reserved for future use.

Budget Planning Tab

This tab screen is reserved for future use.

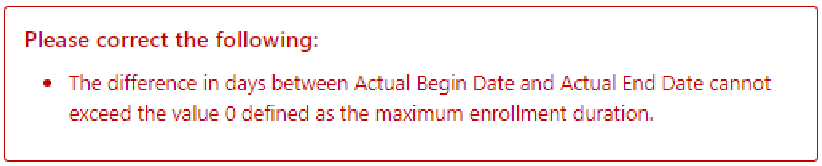
Closure Information Tab

The Closure Information tab is used to complete enrollment. If the activity being added is not a funded service, the enrollment procedure will advance from the Service Provider tab to this Closure tab.

To enter closure data:

1. If the individual has completed the activity, enter the Last Activity Date and Completion Code status.

Note: All program service codes have pre-defined durations. Staff must enter a service end date that complies with the duration assigned to the code. Violation of this business rule will prompt the display of an error message such as the following:

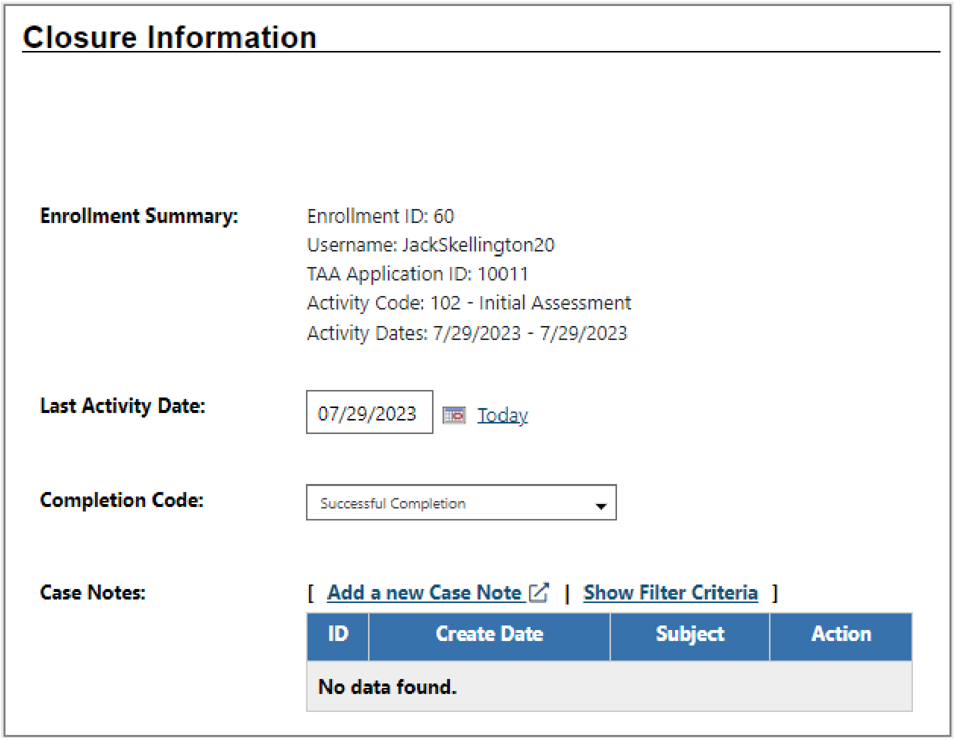


Sample Error Message re: Actual End Date

2. If the activity requires credential information to be entered, additional required fields will appear for a completion code.

Note: Certain activities will not require credential data to close the activity (e.g., TAA Waiver for Marketable Skills).

3. Add any case notes, as desired, by clicking the **Add a new Case Note** link.



TAA Enrollment Form – Closure Information Tab

4. Click **Finish** to complete the enrollment and return to the updated Programs tab, with the activity listed in the Activities section (as shown in the following figure).

Search:

PE	EE	Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	✓	O	304 - Customized Training No Provider Information	W	TAA	N/A	07/29/2023	09/29/2023	Close
✓	✓	O	205 - Individual Employment Plan (IEP/EDP) No Provider Information	W	TAA	N/A	07/29/2023	07/29/2023	Close
✓	✓	O	236 - TAA Waiver - Training Not Available No Provider Information	W	TAA	N/A	07/29/2023	08/29/2023	Close
✓	✓	O	102 - Initial Assessment Sample Office Services Provider	W	TAA	N/A	07/29/2023	07/29/2023	Close

Page 1 of 1 Rows: 10

Sample TAA Service Table

You can continue to record additional services for individuals by clicking **Create Activity** and following the previous steps for additional enrollment in TAA activities.

Managing the TAA Service Table

The WIT system displays various information in the service table to help staff manage program service details on behalf of the individual.

These include the following:

- PE checkmark – indicates whether the service triggers program entry, based on the characteristics assigned by the System Administrator.
- EE checkmark – indicates whether the service extends soft exit to avoid a 90-day lapse in service delivery, based on the characteristics assigned by the System Administrator.
- Status – indicates the status of the program service. The system displays a status legend at the bottom of the screen. Values include:
    - O = Open
    - C = Closed
    - S = System Closed
    - V = Voided
- ID # – Sequential, unique system-generated number that identifies each program service record.
- Activity/Provider link – when staff selects this link, WIT presents the program service details in view mode.
- Actions link – when staff selects this link, WIT presents the program service details in edit mode. This is referred to as the Edit Wizard.

Note: This is the preferred view option for most staff users.

- Funding/Grant display – indicates the selected customer program group for the service.

- Projected Begin Date – displays the future start date entered for the service. The system displays N/A if no date was entered.
- Actual Begin Date – displays the actual start date entered for the service. The system prevents staff from entering a future date in this field.
- Projected End Date – displays the estimated end date entered for the service.
- Actual End Date – displays the actual completion date entered for the service. The system prevents staff from entering a future date in this field.

In addition to these informational displays, WIT also provides filtering tools to help staff manipulate the information shown. These include:

- Search field – enables staff to enter a keyword (for example, a service name) by which to search for and filter the current services displayed.
- Page navigation controls – enable staff to access the first, previous, next, and last pages displayed for multi-page service table.
- Rows filter – enables staff to increase the number of rows per page, thus decreasing the total number of pages displayed.

Editing a Program Enrollment Service Record

WIT enables staff to modify a service enrollment record in two ways:

- **Edit Wizard** – Staff may select the "W" displayed in the Action column to initiate the Edit Wizard. In this mode, the system displays the starting General Information tab the way it did when staff first created the service. Staff may edit any fields on this tab screen that are not locked down, clicking **Next** at the bottom of the page to secure their edit(s). Staff may continue to edit existing data on a tab-by-tab basis, similar to how they created the service. If no additional edits are required, staff may select the Exit Wizard link displayed in the lower left corner of the tab screen. Staff will then click **OK** to dismiss the notification displayed.
- **Close Link** – If staff needs to close the service, they may select the Close link displayed in the Actual End Date column. In response, the system will display the Closure Information tab screen, where staff provide an actual end date and a complete code to close the service. Once the service record is closed, WIT displays the actual end date staff entered to replace the Close link previously displayed in the Actual End Date column.

Viewing a Program Enrollment Service Record

Staff may select the **Activity / Provider** link that displays the service name to view service details in View Mode.

Assessment Results in Assessments Tab

Training Objectives

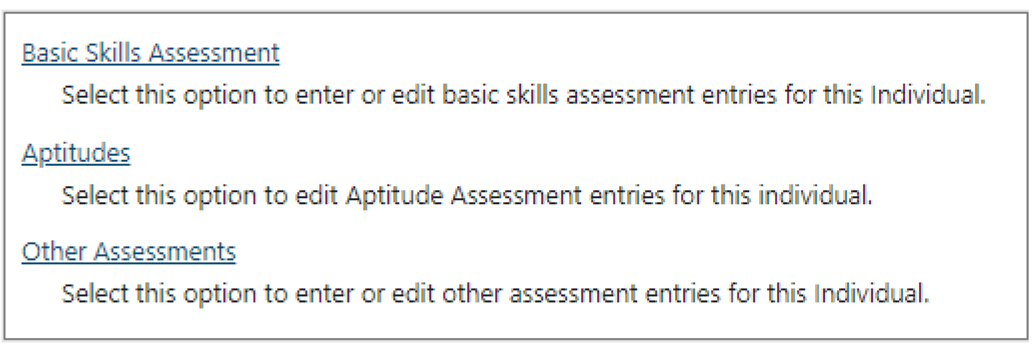
After completing the lesson, you will be able to:

- understand how to record assessment results.
- understand which assessments are recorded in the Assessments tab.

The Assessments tab is where records of assessment types and assessment results pertaining to the client are maintained.

Note: Staff may record assessment results for the individual before he/she becomes a TAA program participant.

To access the Assessments tab for the assisted individual, click to expand **Staff Profiles > Case Management Profile> Assessments.** The Assessments tab displays links to any existing assessments for the individual tab.



Assessments Tab Categories

The links under the Assessments tab include:

- **Basic Skills Assessment** – Enter assessment results for several different assessment tools, such as TABE and CASAS.

- **Aptitudes** – Enter assessment results for GATB and others.
- **Other Assessments** – Enter other assessments that are not covered in the other three assessment categories, such as Myers-Briggs and typing tests.

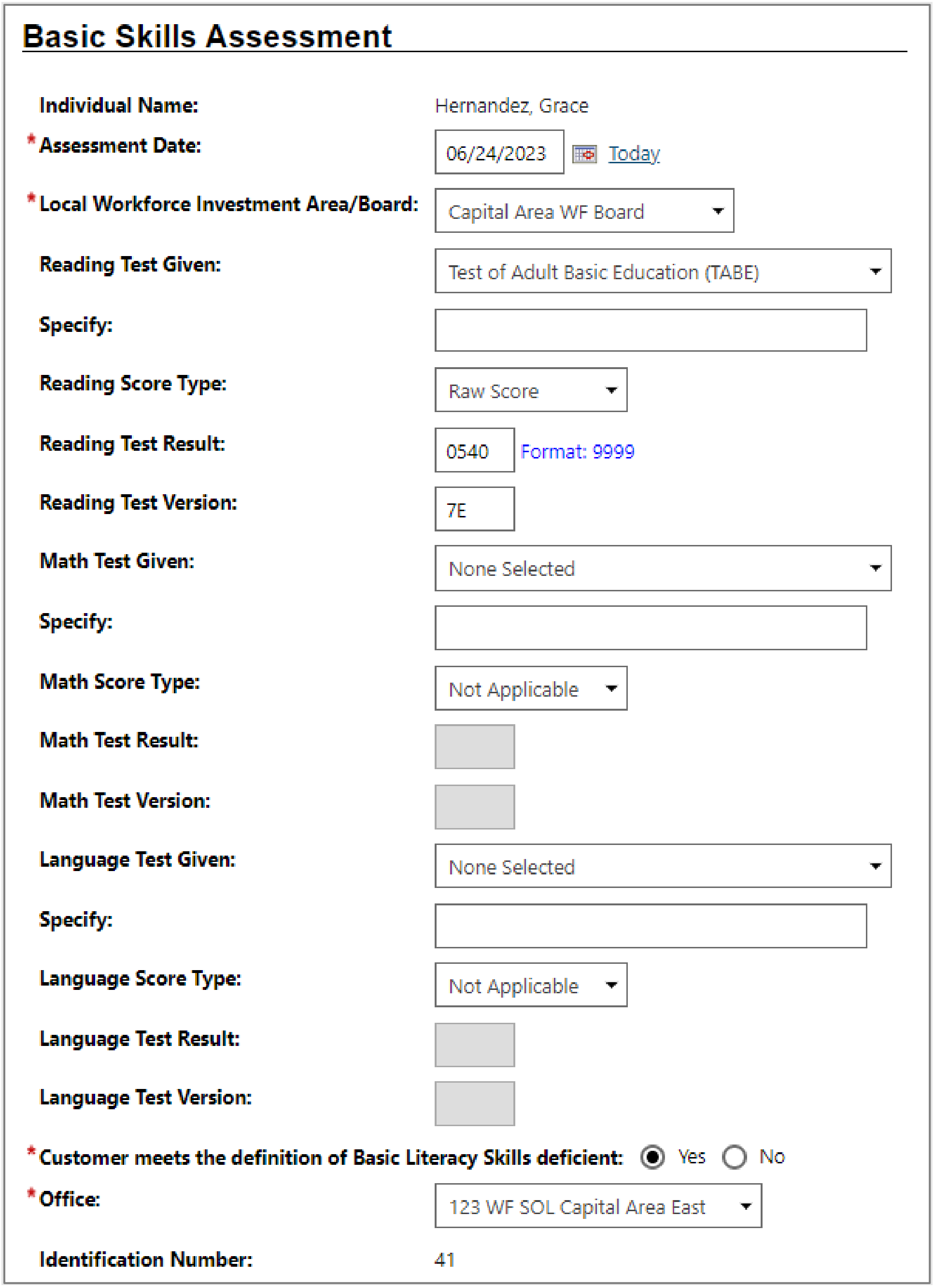
Basic Skills Assessment

The Basic Skills Assessment form allows staff to enter test scores for Reading, Math, and Language assessments taken by a participant, such as CASAS, TABE, etc.

To add or update Basic Skills Assessment test scores for an individual, follow these steps:

1. Click the **Basic Skills Assessment** link on the Assessments tab. The Basic Skills Assessments page displays any existing assessment records.
2. To create a new assessment record, click **Add Assessment.** To update an existing record, click the **Edit** link in the Action column. The Basic Skills Assessment entry form displays.
3. Enter the Assessment Date and LWIA/Board. LWIA determines which tests are available to choose from.
4. For each skills area tested — Reading, Math, and Language – select the type of test that was taken from the Test Given drop-down list. If Other is chosen, enter the test name in the Specify field below.
5. Select the scoring method from the Score Type drop-down list (**Grade Equivalent** or **Raw Score**).

6. Enter the Test Result value in the proper format based on the score type previously selected, noting the following: Grade Equivalent - Valid scores range from 00.0 through 13.0 (value must include the decimal point). Note the following special-use score values: Enter 87.0 when the individual is not tested, and their skills are obviously below the 9th grade level. Enter 88.0 when the individual refuses testing, could not be tested, or testing was not needed. Raw score values require 4 numbers, so enter a leading zero if the raw score is only 3 digits.
7. Specify the Test Version taken.
8. Specify if the Customer meets the definition of Basic Literacy Skills deficient. If the Reading, Math, or Language score is less than 9.0, or equal to 87.0, the system automatically records Yes if the score type is Grade Equivalent and the test given is a major assessment such as TABE or CASAS.
9. (Optional) Select the WP Service Record this assessment applies to from the drop-down list.
10. Select the affiliated **Office** from the drop-down list.
11. Click **Save** to save the test scores record. The Basic Skills Assessments page redisplays.



Basic Skills Assessment

Individual Name:	Hernandez, Grace
* Assessment Date:	06/24/2023 Today
* Local Workforce Investment Area/Board:	Capital Area WF Board
Reading Test Given:	Test of Adult Basic Education (TABE)
Specify:	
Reading Score Type:	Raw Score
Reading Test Result:	0540 Format: 9999
Reading Test Version:	7E
Math Test Given:	None Selected
Specify:	
Math Score Type:	Not Applicable
Math Test Result:	
Math Test Version:	
Language Test Given:	None Selected
Specify:	
Language Score Type:	Not Applicable
Language Test Result:	
Language Test Version:	
* Customer meets the definition of Basic Literacy Skills deficient:	Yes No
* Office:	123 WF SOL Capital Area East
Identification Number:	41

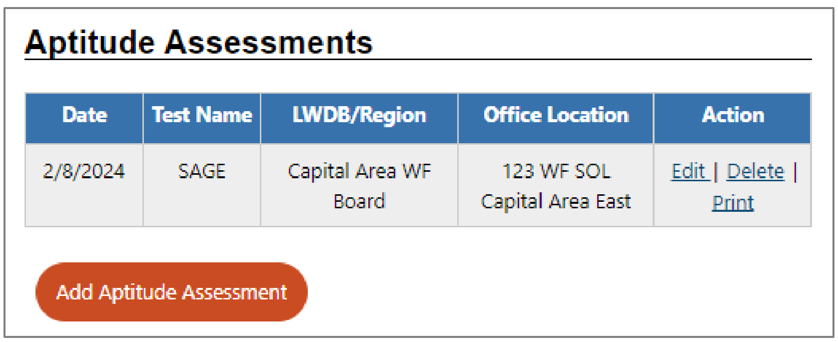
Basic Skills Assessment Page

Aptitude Assessment

The Aptitude Assessment form allows staff to enter test scores for common assessments taken by a participant, including SAGE, GATB, Ability Profiler, and CareerScope (for Vets and their dependents).

To add or update Aptitude Assessment test scores for an individual:

1. Click the **Aptitudes** link on the Assessments tab. The Aptitude Assessments page displays any existing assessment records.



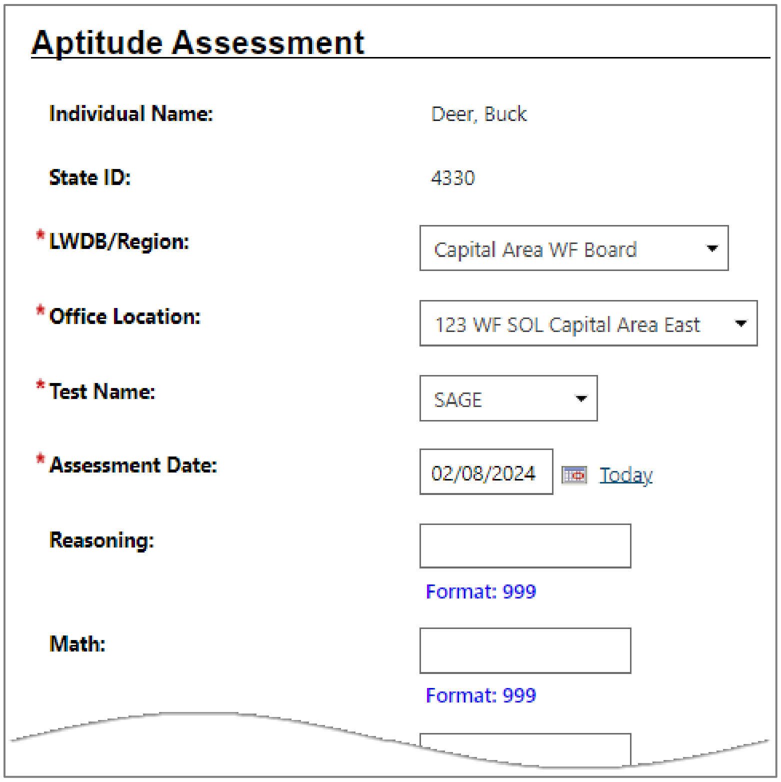
Aptitude Assessment Screen

2. To create a new assessment record, click **Add Aptitude Assessment,** or to update an existing record, click the **Edit** link in the Action column. The Aptitude Assessment entry form displays.

3. Select the LWDB/Region, Office Location, and Test Name from the drop-down lists, and enter the Assessment Date.

4. For each of the areas tested, enter the test scores.

5. Enter any additional Comments and click **Save**. Aptitude information will then display.



Completed Aptitude Score Page

Other Assessments

The Other Assessments category displays assessments that do not fit the other categories, including typing tests.

To enter assessment results for assessments in this category, follow these steps:

1. Click the **Other Assessments** link. It will display a list of assessments for Texas.
2. Click **Add Assessment** to record results for an assessment listed.
3. Enter the Assessment Date and Test Result score.
4. Select the Test Given from a drop-down list.
5. Enter any Comments and click **Save**. The results are then recorded.

Objective Assessment Summary (OAS)

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

Training Objectives

After completing this lesson, you will be able to understand:

- where the Objective Assessment Summary is located within the Plan tab.
- the primary function of the OAS.
- how the OAS is organized into tabs and the information that can be entered on those tabs.
- how the OAS relates to the IEP.

Note: There is no system requirement to complete an OAS for the Trade participant, so refer to agency policy for guidance.

Staff from other programs may also create an OAS for the individual, so it becomes a shared commodity between/among programs.

The Objective Assessment Summary (OAS) is used to satisfy program requirements for recording results of Vocational Skill Assessments or Objective Assessment activities. Each program application (e.g., WP, Trade, WIOA, SNAP E&T, and Choices) will have its own assessment record associated with it.

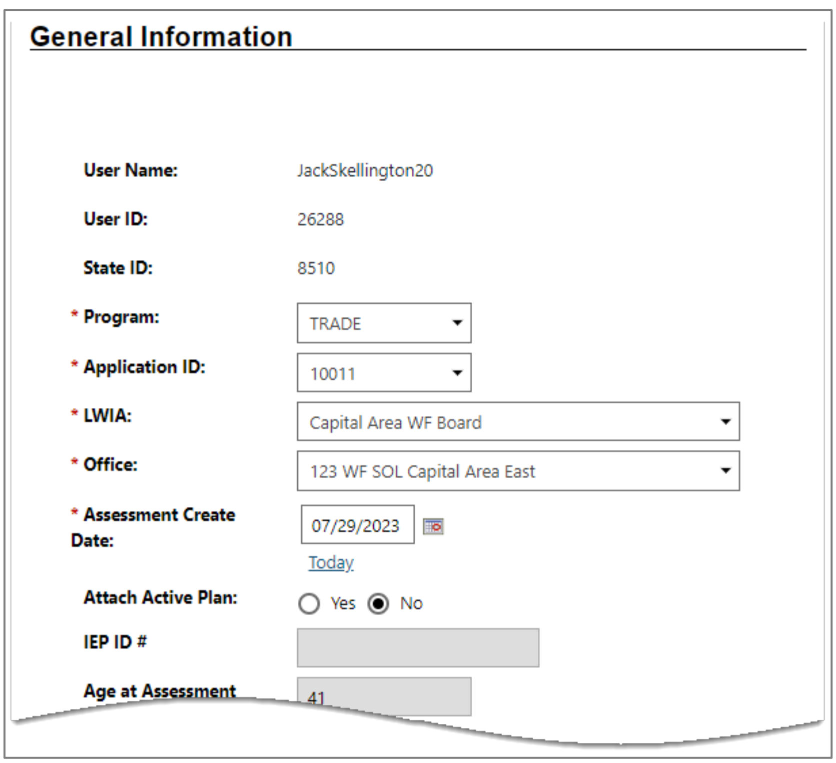
The data collected in the assessment process for employment and training programs is commonly used to assess vocational skills and aptitudes as related to employability, job seeking, and job keeping skills, and may be used in the analysis and development of Employment Plans/Service Strategies.

Note: You can associate an OAS record to an open Individual Employment Plan (IEP), however, there is no link to associate OAS results to Goals and Objectives set in the IEP/SS form.

To create an Objective Assessment Summary (OAS) for the assisted individual:

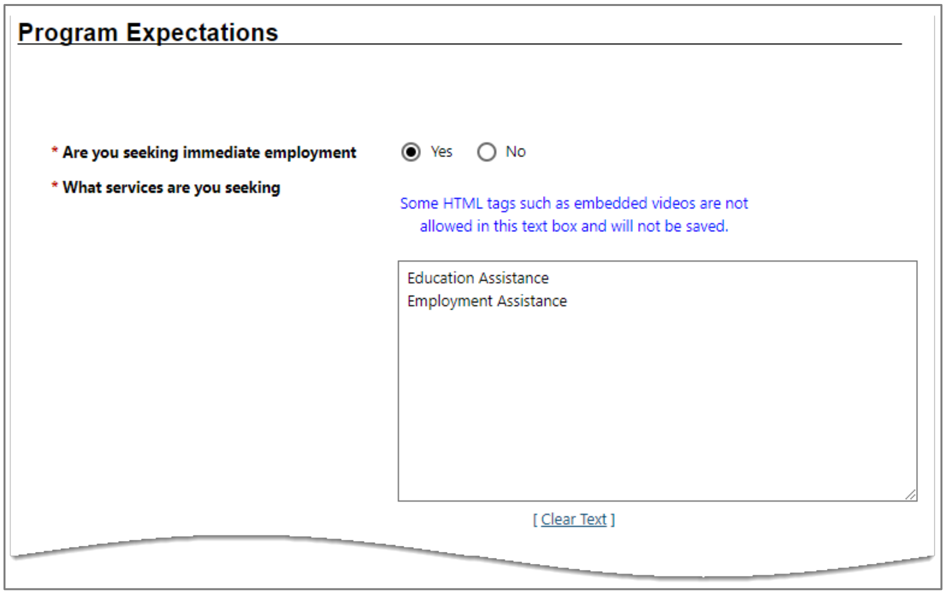
1. On the Plan tab of the Case Management Profile, click the **Create Objective Assessment Summary** button. The General page displays (see figure below).

Note: Some fields on the following pages may be pre-populated based on entries from the individual's General Information and Background tabs. Some data can be changed for OAS purposes.



Objective Assessment Summary Wizard – General Information Page

2. In the General Information section, select the Program for which you're creating the OAS. The Application ID fills in automatically.
3. Select your LWDA and Office affiliation.
4. Enter the Assessment Create Date for the OAS.
5. Specify whether to attach an active Individual Employment Plan (IEP) to the OAS. If Yes, the plan ID populates automatically.
6. In the Contact Information section, if necessary to add or change any information, click the **Edit Contact Info** link, and make your changes.
7. In the Alternate Contact section, to add an alternate contact person, click the **Click Here** link.
8. In the Staff section, enter the date this assessment was completed.
9. If desired, enter a note for the assessment in the Overall Note text box.
10. Click **Next** to save your edits and continue to the Expectation page (see figure below).



Objective Assessment Wizard – Program Expectations Page

11. In the Program Expectations section:

    i. Indicate whether the individual seeks immediate employment.

    ii. Record desired services in the text box, for example, career counseling or work readiness.

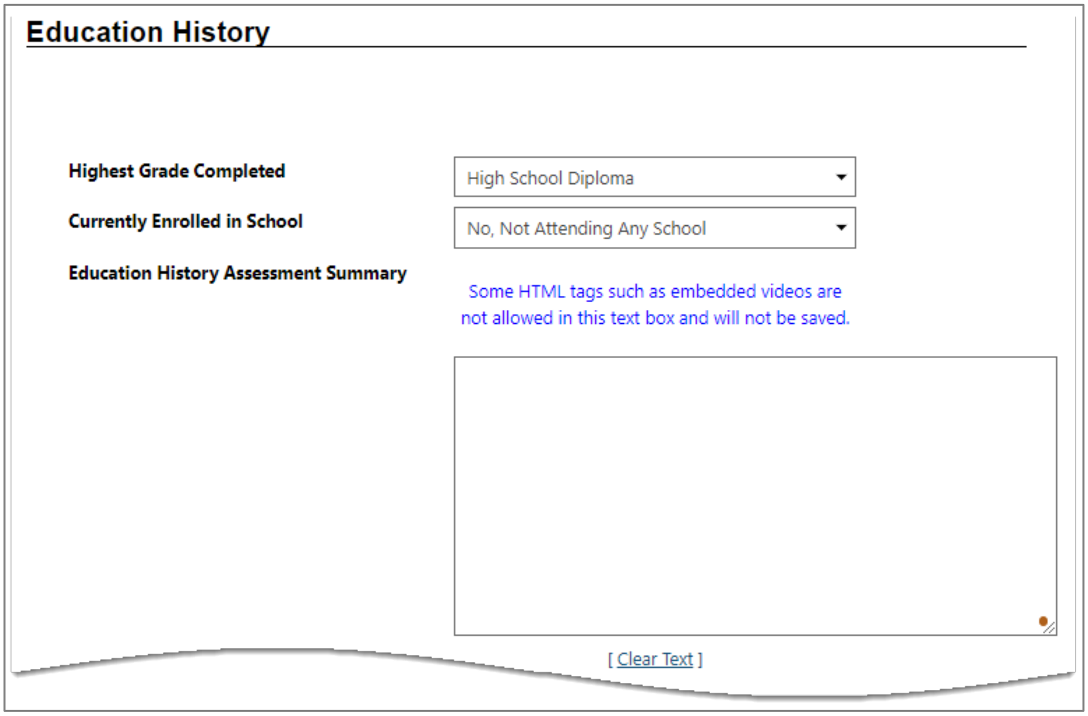
12. In the Employment Expectations section:

    i. Select up to three desired occupations.

    ii. Specify desired job attributes, such as employment type, full or part time, shift preferences, desired salary, etc.

    iii. Identify any benefits needed, job search assistance requested, and other requested career planning or training services and preferences, as appropriate.

13. Click **Next** to save your edits and continue to the Education page (see figure below).



Objective Assessment Wizard – Education Page

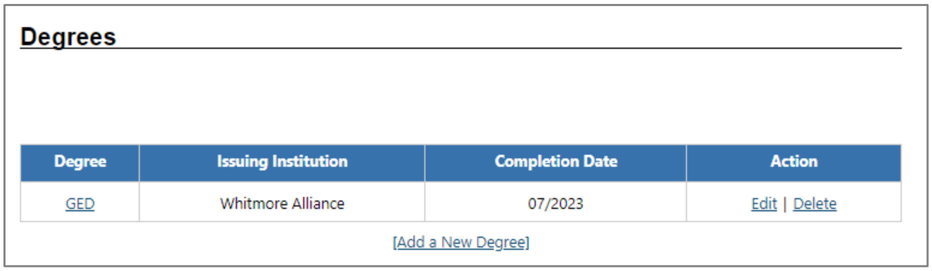
14. In the Education History section:

    i. Select or verify the individual's highest grade completed and current school status.

    ii. Enter any comments to summarize their education history.

15. In the Basic Skills/Education Factors section, identify their high school dropout status, any areas of basic skills deficiency, primary language, need for financial aid, and other factors, as applicable.

16. Click **Next** to save your edits and continue to the Degree page (see figure below).



Degrees

Degree	Issuing Institution	Completion Date	Action
GED	Whitmore Alliance	07/2023	Edit | Delete

[Add a New Degree]

Objective Assessment Wizard – Degree Page

Note: If any degree information was previously saved in the Background Wizard and/or Résumé Builder, it will be listed here.

17. If an existing degree record needs to be changed, click the **Edit** link in the Action column.

18. To add a degree, click the **Add a New Degree** link.

    i. In the Add Degree pop-up window, complete the required details of the individual's degree, then click **Save**.

19. Click **Next** to save your edits and continue to the Certificate page (see figure below).

Certificates

Certificate License	Organization	Completion Date	Action

[Add a New Certificate]

Objective Assessment Wizard – Certificate Page

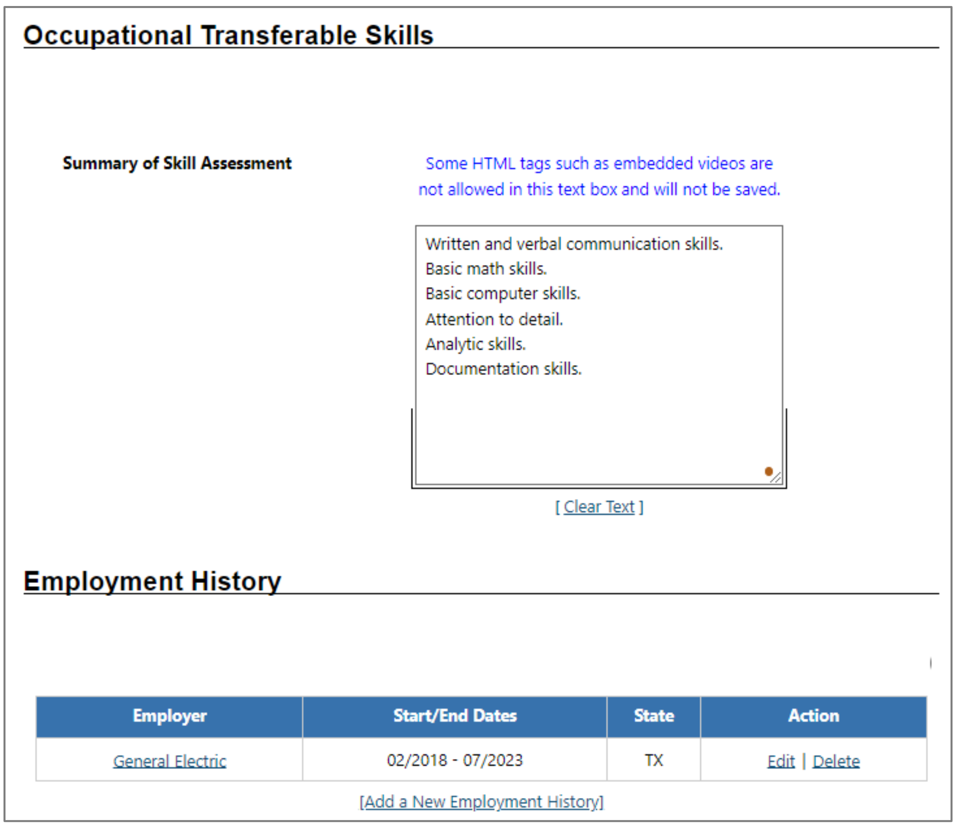
Note: If any certificate information was previously saved in the Background Wizard and/or Résumé Builder, it will be listed here.

20. If an existing certificate record needs to be changed, click the **Edit** link in the Action column.

21. To add a certificate, click the **Add a New Certificate** link.

    i. In the Add Certificate pop-up window, complete the required details of the individual's certificate, then click **Save**.

22. Click **Next** to save your edits and continue to the Employment page (see figure below).



Objective Assessment Wizard – Employment Page

Note: If any employment history information was previously saved in the Background Wizard and/or Résumé Builder, it will be listed here.

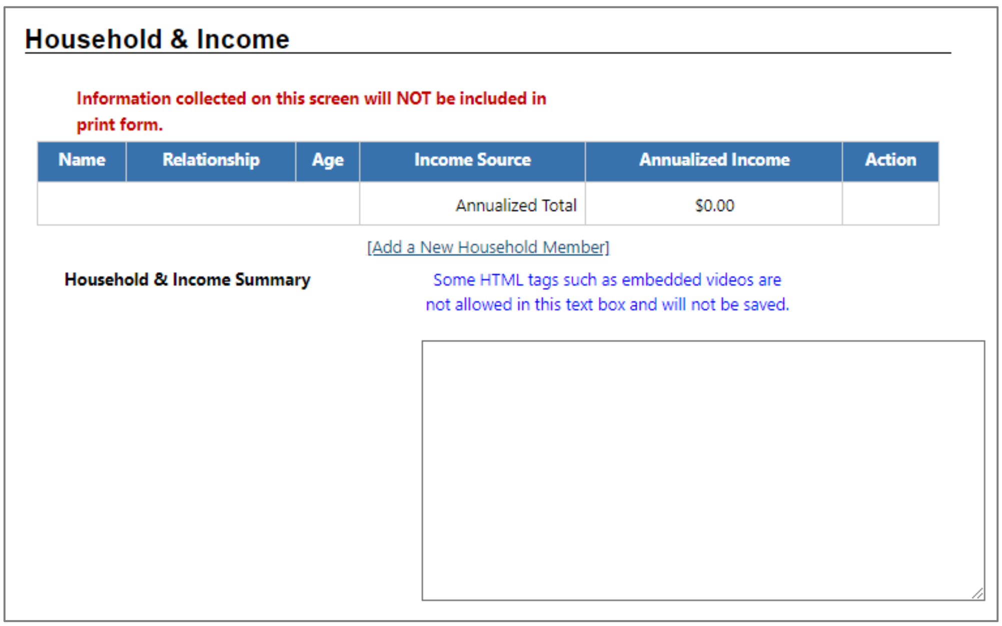
23. In the Occupation Transferrable Skills section, enter any information that summarizes the skill assessment for the individual in the text box provided.

24. In the Employment History section, if an existing job record needs to be changed, click the **Edit** link in the Action column.

25. To add an employment history record, click the **Add a New Employment History** link.

    i. In the Add Employment pop-up window, enter all required information, then click **Save**.

26. Click **Next** to save your edits and continue to the Household & Income page (see figure below).



Objective Assessment Wizard – Household & Income Page

Note: The Household & Income page is a secure information page. The information on it is not included in the print form. You will need a separate privilege setting that would allow you to edit, view only, or not access this page at all.

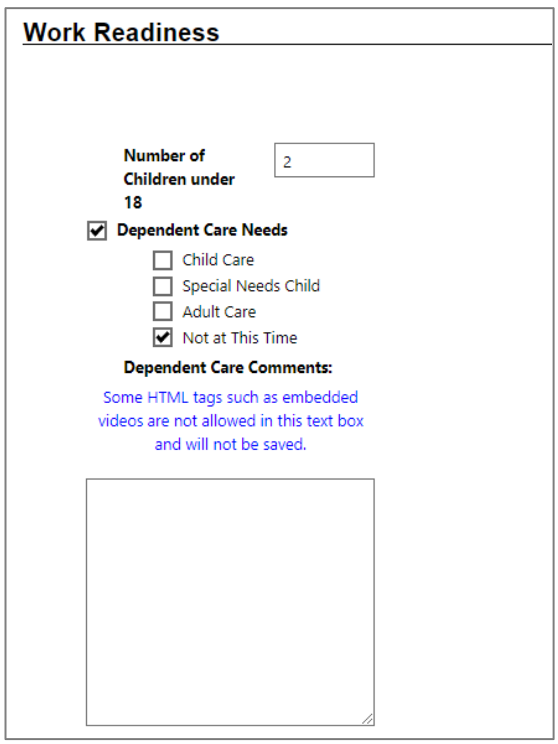
27. In the Household & Income Summary text box, enter a brief summary statement, as applicable.

28. To add a new household member and their income, click the **Add a New Household Member** link.

    i. In the Add Income pop-up window, enter all required information, then click **Save**.

29. Click **Next** to save your edits and continue to the Work Readiness page (see figure below).

The comprehensive Work Readiness page allows staff to identify what obstacles or issues the individual might face that will affect their work readiness.



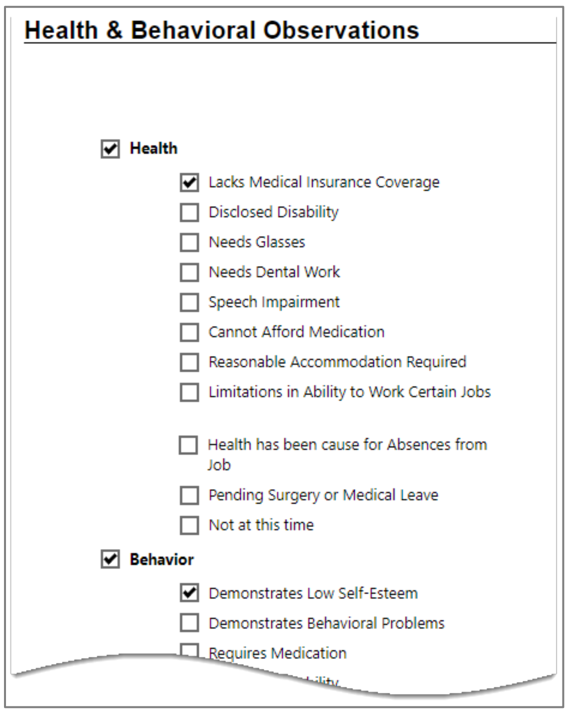
Objective Assessment Wizard – Work Readiness Page

30. Select items that may present obstacles by clicking in the checkboxes, as necessary.

31. Enter comments as needed.

32. Click **Next** to save your edits and continue to the Barriers page (see figure below).

The comprehensive Barriers page allows staff to identify—after observing the individual—certain obstacles or issues the individual might face that will affect their employment/training. Sections include Health & Behavioral Observations, Living Environment, Economic Factors/Financial Situation, Vocational/ Occupational Factors, Other Assistance Received, Barriers to Employment, and Access Assessment.



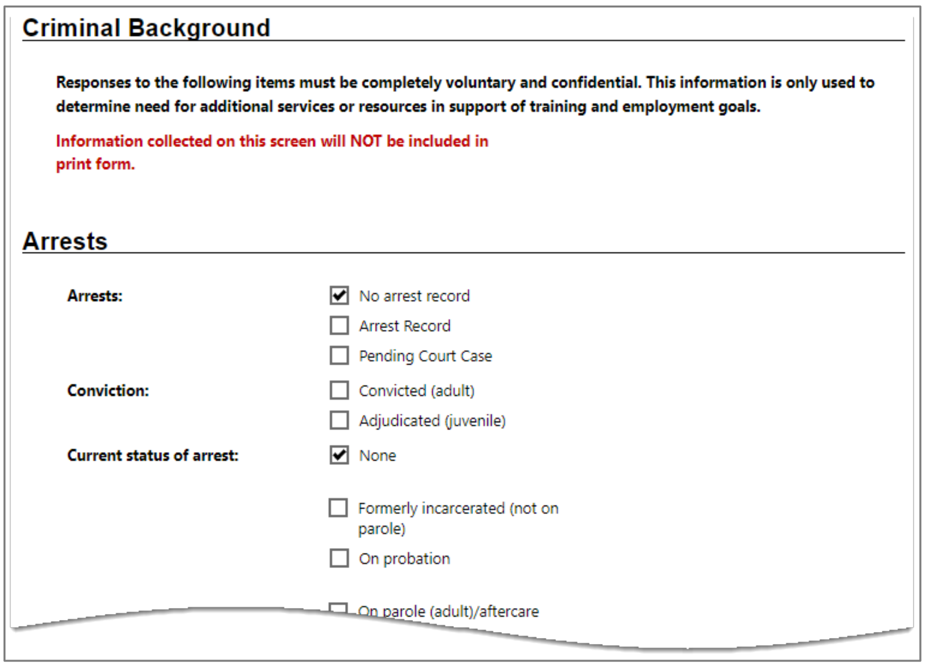
Objective Assessment Wizard – Barriers Page

33. Select statements that correctly characterize the individual’s health, behavior, and living environment information by clicking in the checkboxes, as necessary.

34. Enter comments as needed.

35. Click **Next** to save your edits and continue to the Criminal Background page (see figure below).

Note: The Criminal Background page is a secure information page. The information on it is not included in the print form. You will need a separate privilege setting that would allow you to edit, view only, or not access this page at all.

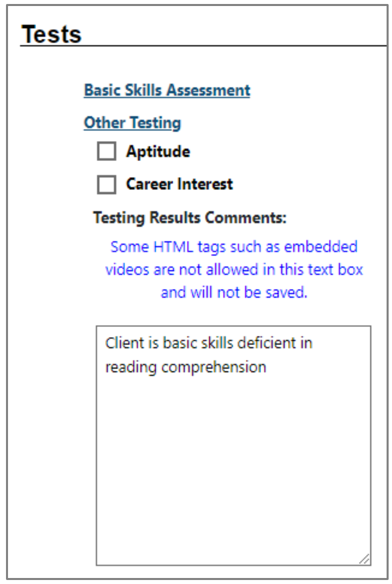


Objective Assessment Wizard – Criminal Background Page

36. Select applicable items by clicking in the checkboxes, as necessary.

37. Enter comments as needed.

38. 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.

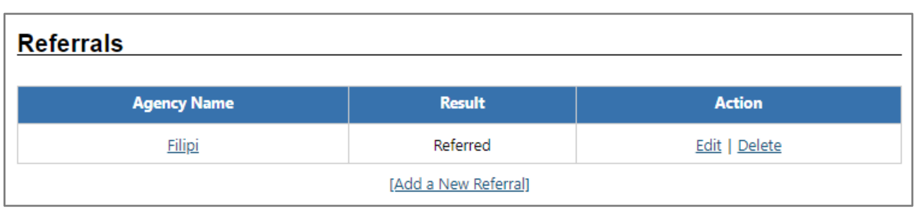
Client is basic skills deficient in reading comprehension

Objective Assessment Wizard – Tests Page and Assessments Tab

39. Click the desired link to add, view, or edit assessment results. A pop-up window will display for adding or editing existing assessment results, just as they are maintained in the Assessments tab of the individual's Case Management Profile.

40. Enter any comments to summarize all test results.

41. Click **Next** to save your edits and continue to the Referrals page (see figure below).


Referrals

Agency Name	Result	Action
Filipi	Referred	Edit | Delete

[Add a New Referral]

Objective Assessment Wizard – Referrals Page

In certain circumstances, a referral to another agency may be made as the last step related to the OAS.

42. If an existing referral record needs to be changed, click the **Edit** link in the Action column.

43. To add a referral, click the **Add a New Referral** link.

44. Complete the fields on the Add Referral pop-up window and click **Save**.

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

Individual Employment Plan (IEP)

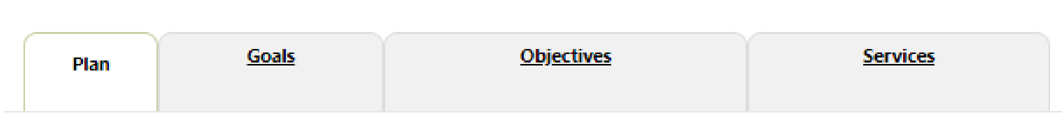
Training Objectives

After completing this lesson, you will be able to:

- Locate the IEP/ISS.
- Create and manage IEP Goals.
- Create IEP Objectives.

The IEP is an ongoing strategy, jointly developed by the participant and case manager, that identifies the participant's employment goals, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goals.

Note: A participant can only have one IEP open at a time, although staff from other programs may also create an IEP for the individual, so it becomes a shared commodity between/among programs. The IEP itself must be created first (Plan tab), followed by the plan's goals. A goal must be created before objectives for that goal can be recorded.



Tabs of the Individual Employment Plan/Service Strategy

The tabs must be completed in order and contain the following information:

- **Plan Tab -** Contains general information about the participant, the program they are enrolled in, and plan dates.

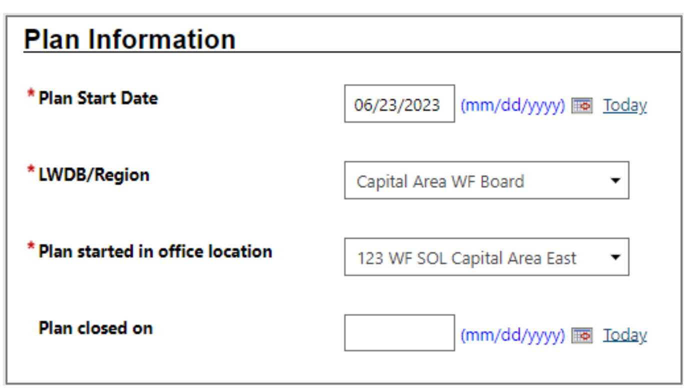
- **Goal Tab -** Enables staff to establish or edit goals for an IEP/SS.
- **Objectives Tab -** Enables staff to add associated with IEP/SS Goals in two ways: creating a new objective manually or selecting from a list of pre-defined objectives.

Note: Some programs may not offer pre-defined objectives.

- **Service Tab -** Displays all services provided for the individual within the program(s) selected. All services provided should relate back to the IEP objectives and goals.

To create an IEP for the assisted individual:

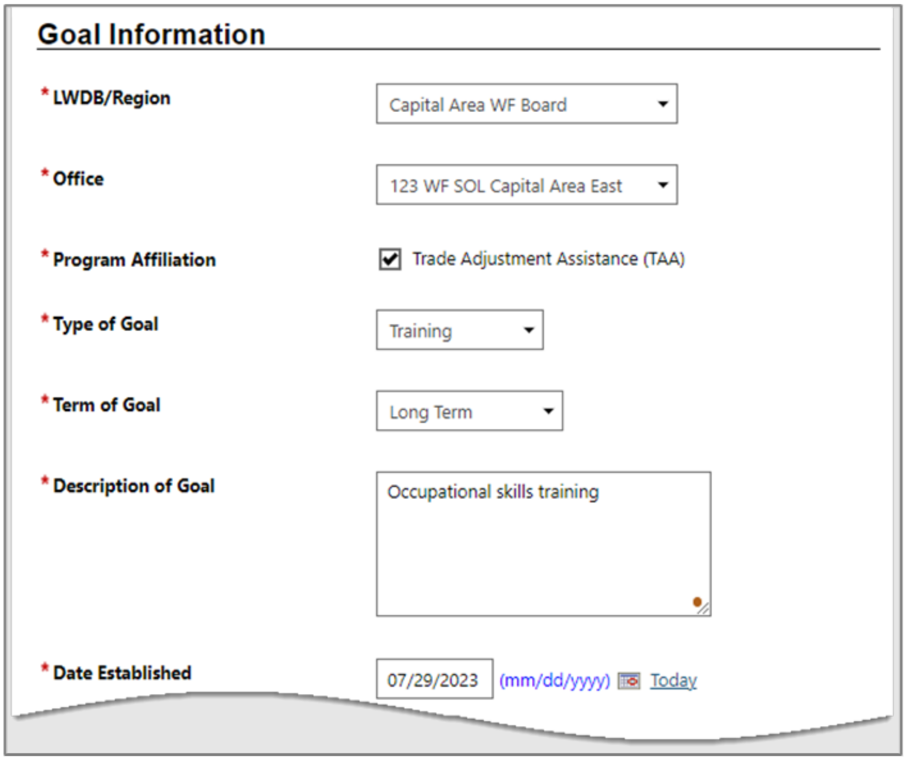
1. Click the **Create Individual Employment Plan/Service Strategy** button on the Plan tab of the Case Management Profile. The Plan tab of the IEP displays. If the individual has any other programs that may also be available for funding needed activities or services, a Currently Participating In section displays. If there are no other programs, this section does not display.
2. In the Plan Information section, complete the required fields, then click **Next** to save your data entry.



Create IEP - Plan Tab

To add a new goal to the IEP for the assisted individual:

1. To add a goal for the plan, click the **Add New Goal** link. The Add New Goal page displays (see figure below).



Create IEP – Add New Goal Page

2. In the Goal Information section, select a LWDB/Region and Office.
3. Check Program Affiliation(s).
4. Select a Type of Goal: **Employment, Training, Schooling**, etc.
5. Select the Term of Goal: **Short Term, Long Term, Intermediate Term**.
6. Enter a Description of Goal.

7. Enter the Date Established for the goal.

8. Enter the Estimated Completion Date for the goal.

Note: Leave the Actual Completion Date blank and the Completion Status set to **Open**. When closing the goal, you will enter the Actual Completion Date, select **Closed**, and indicate the Reason Closed.

9. Enter any additional information in the Goal Details text box.

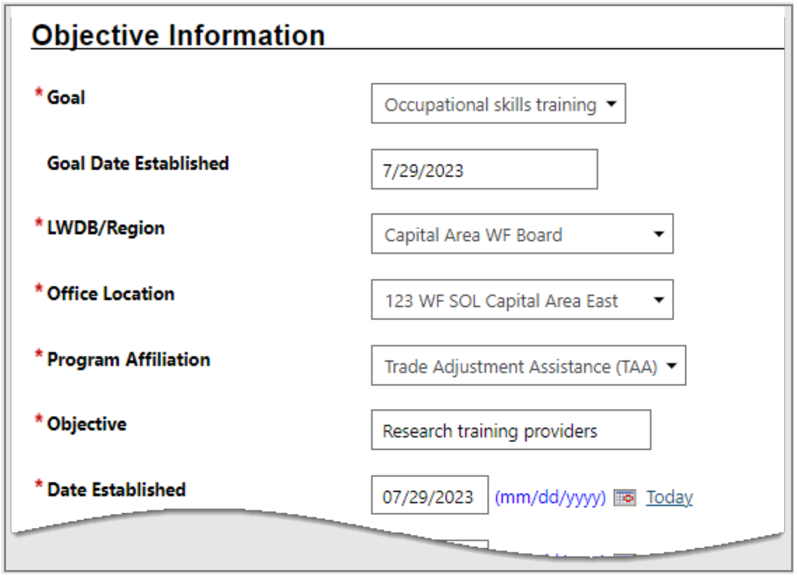
10. Click **Save**. The Goals tab redisplays with the added goal along with links to Edit or Delete.

11. Repeat this procedure for as many goals as desired.

12. Click **Next** to proceed to the Objectives tab, where you add objectives that support the goals.

To add a new objective to the IEP for the assisted individual:

1. Click the **Add new objective** link to enter an objective for the individual manually.



Create IEP – Add New Objective Page (Manual Entry)

2. Select the Goal to be associated with this objective. The Goal Date Established field fills in automatically with the goal date.

3. Select the LWDB/Region, Office Location, and Program Affiliation.

4. Name the Objective, which is an activity that will serve to achieve the associated goal.

5. Enter the Date Established for the objective and the Review Date on which progress should be evaluated.

Note: Leave the Actual Completion Date blank and Completion Status set to **Open**. When closing the objective, you will supply the Actual Completion Date, select **Closed**, and indicate the Reason Closed.

6. Enter any additional information in the Objective Details text box.

7. Click **Save**. The Objectives tab redisplays with the added objective along with links to Edit or Delete.

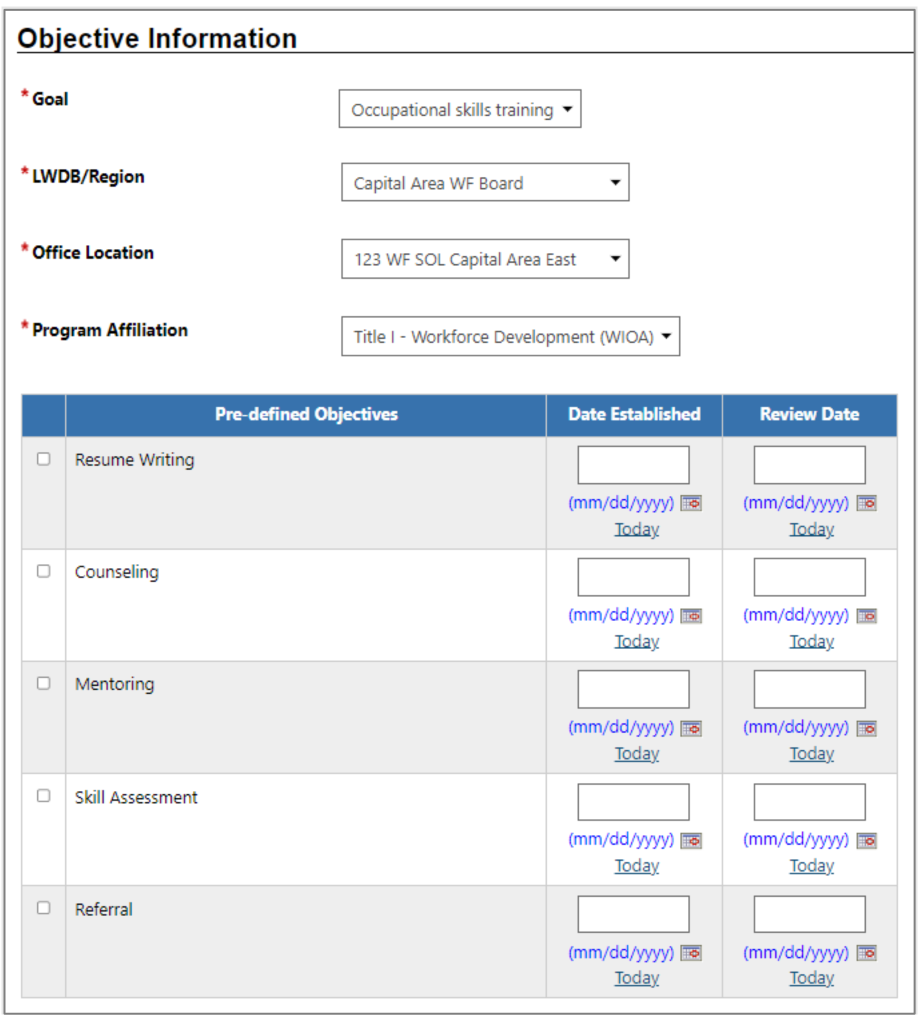
8. Repeat this procedure for as many objectives as desired.

Instead of defining an objective in a free-form fashion, pre-defined objectives may be available for selection based on the program affiliated with the goal.

Note: Pre-defined objectives must be set by the State and may not necessarily apply to all programs.

To add a pre-defined objective to the IEP for the assisted individual:

1. On the Objectives tab, click the **Select pre-defined objectives** link.
2. Select the Goal for the objective(s).
3. Select the LWDB/Region and Office Location.
4. Select the Program Affiliation for the objective. The page will refresh with the list of pre-defined objectives for the program (see figure below).



Create IEP – Select Pre-Defined Objective Page

5. Click the checkbox in the left column for each objective to add to the individual's program goal.

6. Enter the Date Established for each objective and the Review Date on which progress should be evaluated.

Note: The objective Established Date must be greater than the Goal Established date, and the Review Date defaults to 45 days after the Established Date. Staff may edit this date.

7. Click **Save**. The Objectives tab redisplays with the added objective, along with links to Edit or Delete.

8. Click **Next** to proceed to the Services tab to review (see figure below).

Note: If services or activities have been provided via the Programs tab, they will display on the IEP Services tab in view-only mode and cannot be modified from within the IEP.

IEP/ISS Services

App # - program	Service/Activity	Begin Date	End Date	Provider	Staff
10011 - TAA	102 - Initial Assessment	A - 07/29/2023	P - 07/29/2023	Sample Office Services Provider	29303
10011 - TAA	236 - TAA Waiver - Training Not Available	A - 07/29/2023	P - 08/29/2023		29303
10011 - TAA	205 - Individual Employment Plan (IEP/EDP)	A - 07/29/2023	P - 07/29/2023		29303
10011 - TAA	304 - Customized Training	A - 07/29/2023	P - 09/29/2023		29303

Create IEP – Services Tab

9. Click **Finish** to complete the IEP/SS plan. The Plan tab of Case Management Profile redisplays with the IEP listed (see figure below).

Individual Employment Plan/Service Strategy

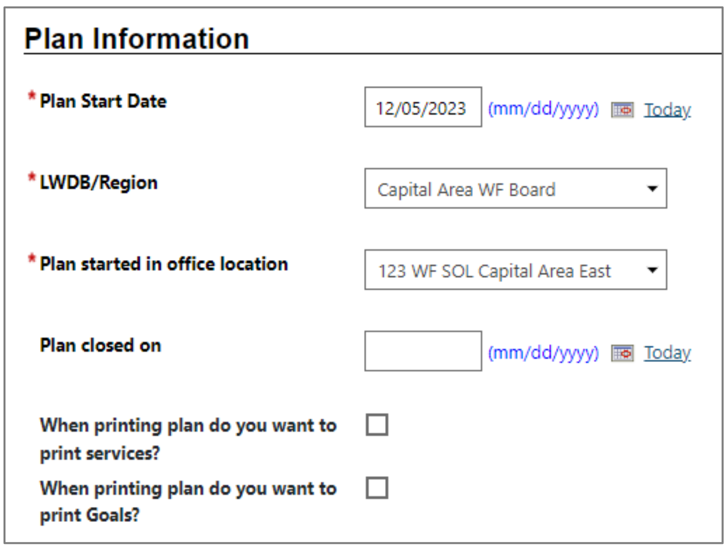
#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
1267	Capital Area WF Board	123 WF SOL Capital Area East	OPEN	1	Marks, John	07/29/2023	Edit Delete Display/Print

Completed IEP

Working with Existing IEP Plans

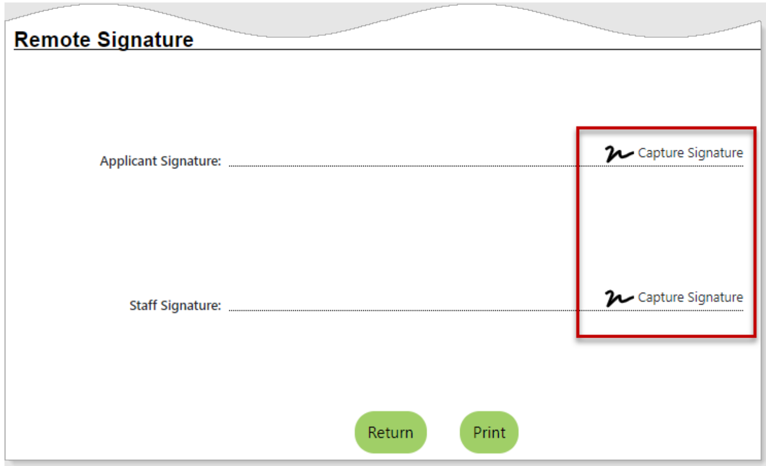
To view and print the entire plan and include signatures:

1. Click the **Display/Print** link in the Action column (see figure above). The IEP Plan page displays.
2. To include the Services and/or Goals in the printed plan, in the Plan Information section, click the checkboxes (see figure below).



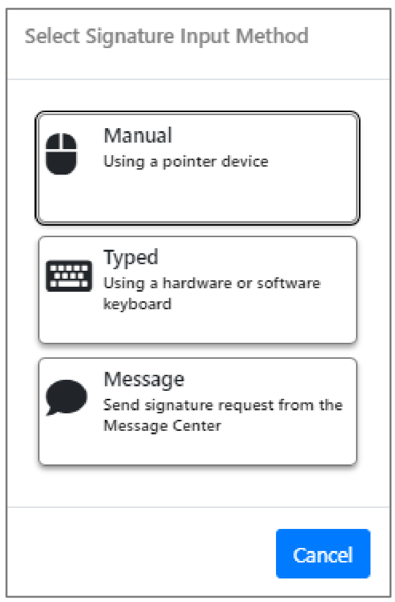
Plan Information Section of IEP Plan Page

3. To include Applicant and/or Staff Signatures, in the Remote Signature section, click the **Capture Signature** link for the desired person (see figure below).



Remote Signature Section of IEP Plan Page

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



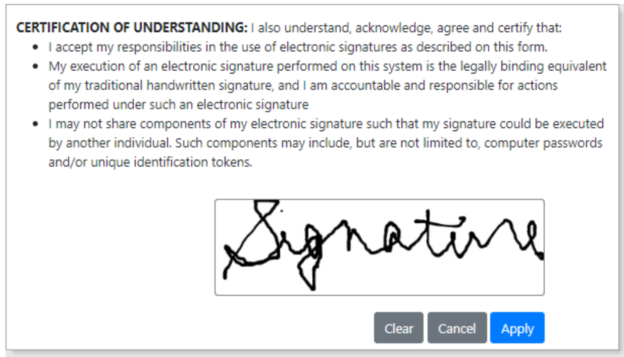
Signature Capture Method Pop-up Window

i. For customers who are present, in-person:

1) Click the **Mouse** icon.

2) Read the certification of understanding statements, then use the mouse to write the signature.

3) Click **Apply** to save it and return to the Plan page.



Signature Capture Window

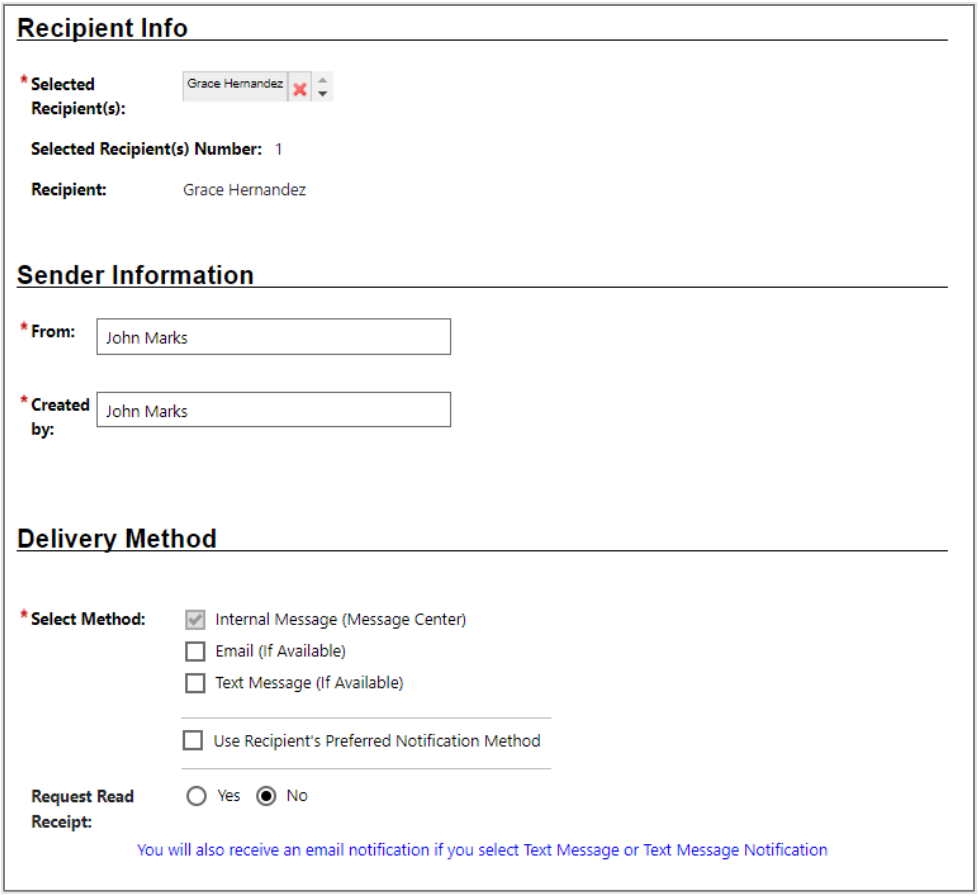
OR,

1) Click the **Typed** icon.

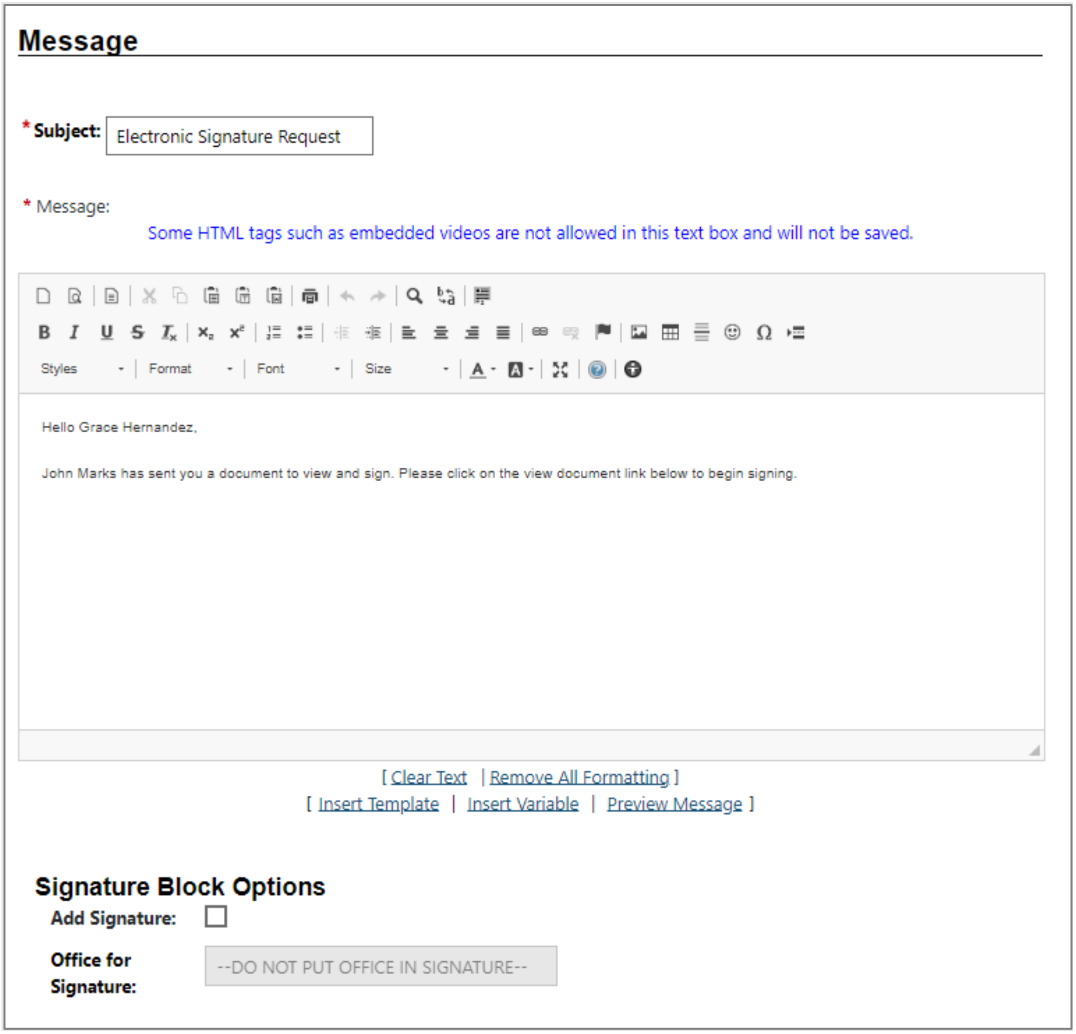
2) User the keyboard to enter the customer's name.

3) Click **Apply**.

ii. For a remote participant, click the **Message** icon. The Compose Message page displays, where you can create and send an Electronic Signature Request message (see figure below).



Compose Electronic Signature Request Message Page, Top Portion



Compose Electronic Signature Request Message Page, Bottom Portion

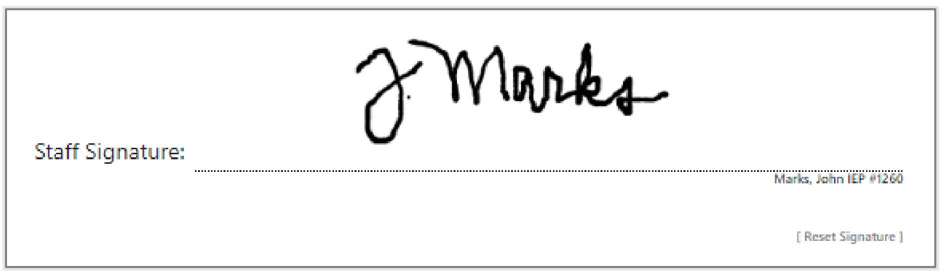
- After clicking **Send**, the message is sent to the recipient's Message Center, and the Plan page redisplays, showing the date and time the signature request was sent. As soon as the recipient signs the attachment using their mouse, their signature is automatically added to the plan.

To capture staff's signature:

iii. Click the **Capture Signature** link displayed on the Staff Signature line and follow the same steps as the customer.

OR,

iv. Select the **Click this link to use your saved signature image** hyperlink if you already created one using My Staff Account. The system will automatically display your signature.



Staff's Digital Signature – System Provided

4. To print the plan, click the **Print** button at the bottom of the page. A PDF version is generated and displays in a pop-up window. From there, you can download or print the file.

Closing IEP Objectives and Goals

To close Objectives or Goals for the assisted individual:

Note: Remember, you must work from the bottom up when closing parts of a plan: Objectives first, then their associated Goals. All Objectives and Goals must be closed before the plan itself can be closed.

1. Open the plan by selecting the **Edit** link in the Action column. The Plan tab of the IEP displays.
2. Click the Objectives or Goals tab, as appropriate.
3. Click the desired **Edit** link.
4. In the Objective (or Goal) Information section, enter the Actual Completion Date, set the Completion Status to Closed, and then select the Reason Closed (**Successful or Unsuccessful**).
5. Add a comment, if desired, then click **Save**. The tab redisplays with the Closed status. Repeat as needed.

Closing the IEP

Before closing a plan, you must close all Objectives and Goals associated with the plan, working **from the bottom up**: Objectives first, then Goals, then the plan.

Note: Because the IEP is a shared commodity among all program staff, please follow agency policy when closing the plan.

To close an IEP for the assisted individual:

1. Click the **Edit** link in the Action column. The Plan tab of the IEP displays.
2. Ensure all Objectives and Goals are already closed by visiting those tabs.
3. On the Plan tab, in the Plan Information section, enter the date the plan closed on in the Plan closed on field.
4. Click **Next** to move through the remaining tabs.
5. Click **Finish** on the Services tab. The Plan tab of the Case Management Profile redisplays with the plan status showing as CLOSED.

Trade Waiver Entry Ribbon

Training Objectives

After completing this lesson, you will be able to:

- Understand what defines a waiver in TRADE, and how they function.
- Create a training waiver.
- Conduct waiver reviews.
- Create a waiver service in the participant's service table, documenting that training was not yet available.

If a TAA-eligible worker is not participating in an approved training program, staff can submit a training waiver request to preserve their Basic Trade Readjustment Allowance (TRA) or income support. All such requests must be approved by the State.

Staff will enroll the customer in a TAA Waiver activity service once the request is approved. The service begin/end dates can be 30 days in duration, so that staff don't have to create multiple waiver activity services on a daily or weekly basis.

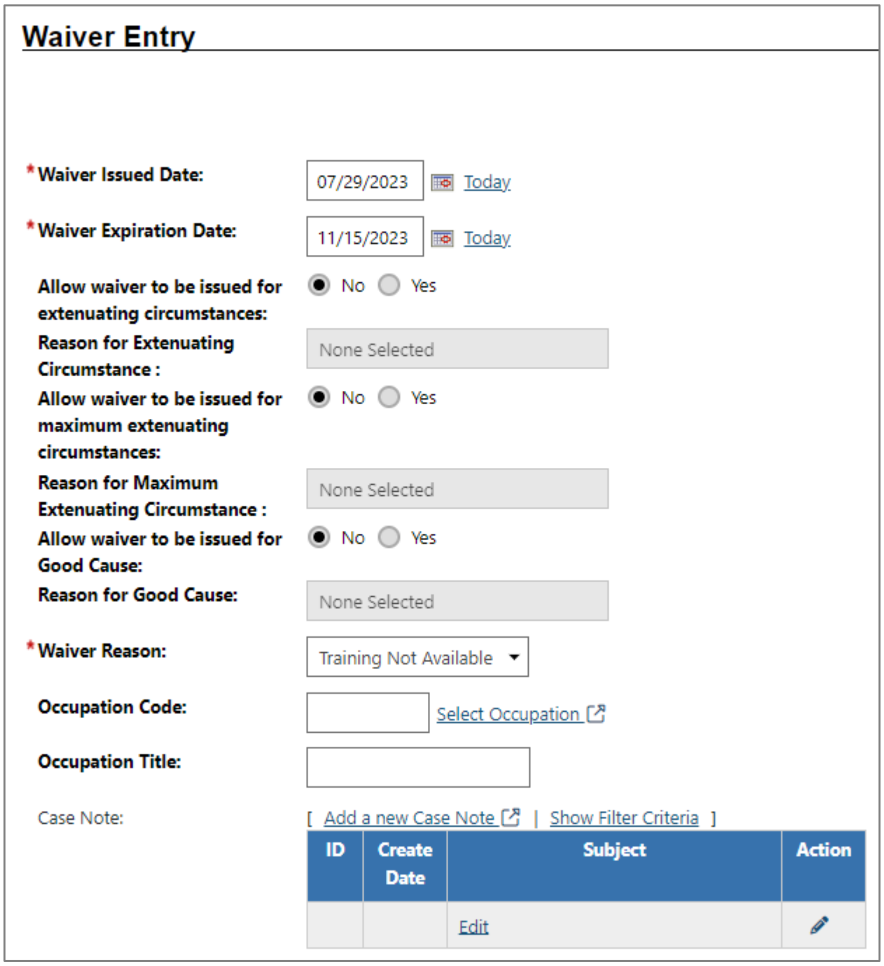
Note: The TAA service codes in WIT have pre-defined durations that cannot exceed a specified number of days.

Once the waiver activity is created, the TAA Waiver Review form must be completed monthly to meet federal requirements. Updating the review status is required by defined time periods (e.g., 28 days) and includes entering any changes in the reasons for, or the status of, the waiver.

To create a TAA Waiver Entry for State approval:

1. Click the **Waiver Entry** ribbon to expand its contents.

2. Click the **Create Waiver Entry** link displayed to access the Waiver Entry screen (as shown below).



Waiver Entry

*Waiver Issued Date: 07/29/2023 Today

*Waiver Expiration Date: 11/15/2023 Today

Allow waiver to be issued for extenuating circumstances: No Yes

Reason for Extenuating Circumstance : None Selected

Allow waiver to be issued for maximum extenuating circumstances: No Yes

Reason for Maximum Extenuating Circumstance : None Selected

Allow waiver to be issued for Good Cause: No Yes

Reason for Good Cause: None Selected

*Waiver Reason: Training Not Available

Occupation Code: Select Occupation

Occupation Title:

Case Note: [Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
		Edit	

Add TAA Waiver Entry Screen

3. In the Waiver Entry section:

   i. Enter the **Waiver Issued Date**.

   ii. (Optional) Authorized staff may edit the default **Waiver Expiration Date** shown.

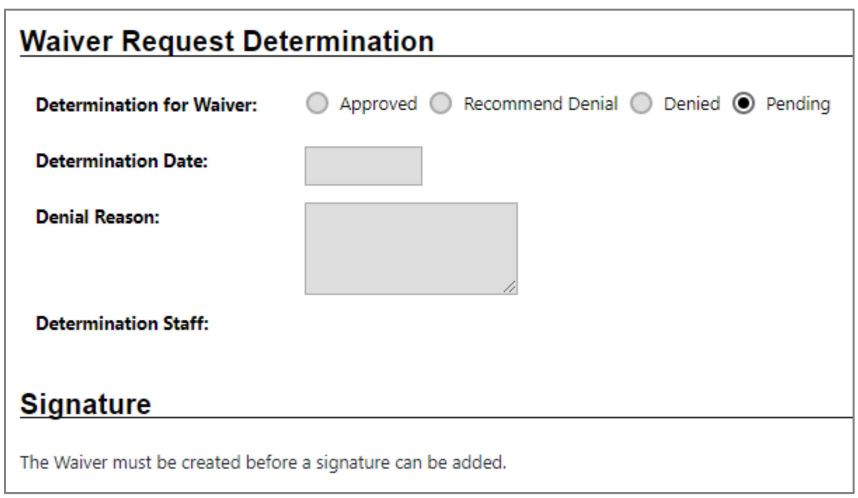
iii. Select the **Waiver Reason**. This should match the type of waiver activity in which the applicant is currently enrolled.

iv. If applicable, select an occupation code.

v. If applicable, enter a case note.

4. In the Waiver Request Determination section:

   i. Maintain the default status of **Pending**. Unless staff has the necessary authority/staff privileges, they cannot make a selection to Approve, Recommend Denial, or Deny the request.



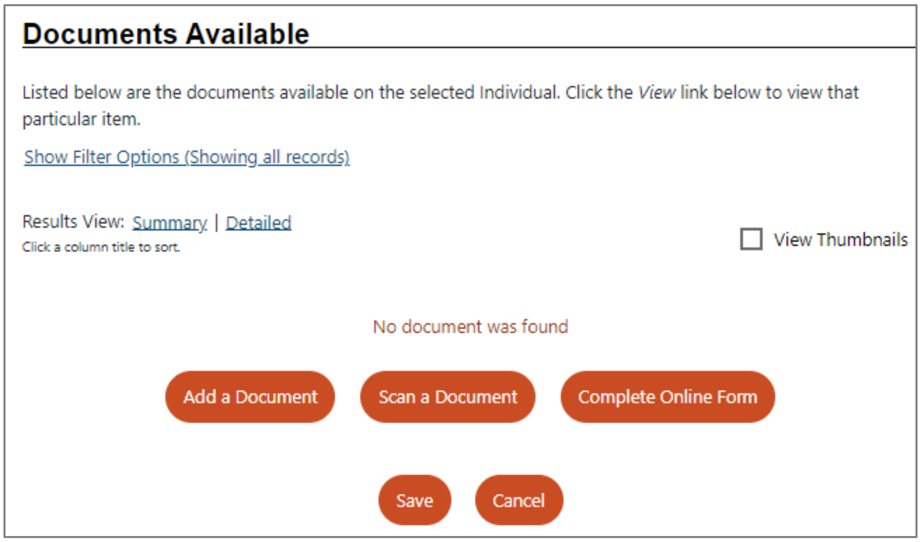
Add TAA Waiver Screen – Waiver Request Determination and Signature Sections

Note: By default, the status of the waiver entry request is Pending until the State issues a determination. The system informs authorized staff of pending waiver requests via the Message Center.

5. If desired, staff may add the customer and staff signatures digitally, but the initial waiver request must first be saved.

6. In the Documents Available section:

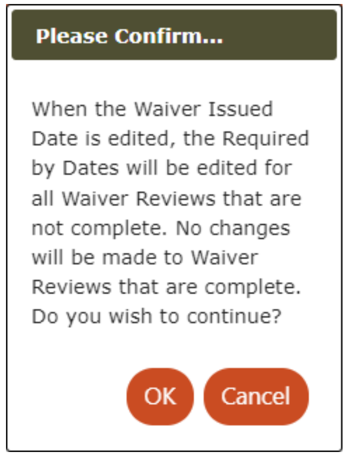
    i. If applicable, include supporting information by selecting the **Add a Document**, **Scan a Document**, or **Complete Online Form** buttons (as shown below).



Add TAA Waiver Screen – Documents Available Section

Note: Supporting documentation can always be helpful, but this section is especially important to document the appeals process if the TAA program participant disagrees with the State determination (Denied) and wishes to appeal the decision.

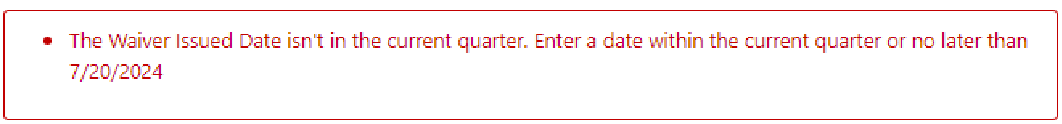
7. Click **Save** to continue. In response, the system displays a confirmation window, as shown below:



Create TAA Waiver Confirmation Window

8. Staff selects **OK** to close the window and continue.

When staff selects the OK button, WIT processes business rules to ensure the data entered meets system requirements. If not, the system will display an error message to prompt staff to make the necessary change(s), as shown in the sample error message that follows:

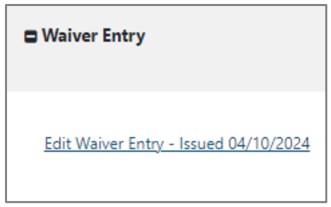


Sample TAA Waiver Entry Error Message

Staff can resolve this issue in one of two ways:

- Re-enter dates contained within the current quarter; OR,
- Have authorized staff adjust the date(s) using the approved "quarter + 20" backdating scheme.

When the TAA waiver request is saved successfully, the system displays the updated Waiver Entry ribbon as shown below.



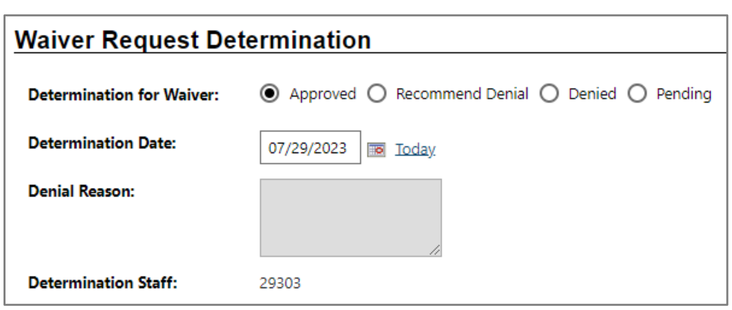
Sample Updated Waiver Entry Ribbon

Program staff (i.e., the case manager) will select this link to edit the original waiver details (if necessary) and manage the 28-day waiver review schedule if the waiver request is approved. State staff will select this link to issue a determination.

Waiver Request Determination

Authorized TWC staff will receive a system notification via the Message Center to identify pending waiver requests. These staff will then review the submitted waiver request and issue a determination.

To access the pending waiver request, authorized TWC staff will assist the individual, access the TAA program area of the Programs tab screen, select the **Waiver Entry** ribbon, and select the **Edit Waiver Entry** link displayed. These staff will review any information submitted by program staff and access the Waiver Request Determination section, as shown below.



Waiver Request Determination Section of Waiver Request Form

Waiver Request Approvals

If TWC approves the request, they select **Approved**, enter the **Determination Date**, and select **Save**.

Note: The Determination Staff's credentials will be displayed after a determination is saved successfully.

As a result of approving the waiver request, the system will update the 28-day waiver review schedule as shown below.

	Required by Date	Review Status	Reviewed Date
Edit	08/26/2023	Pending	
Edit	09/23/2023	Pending	
Edit	10/21/2023	Pending	
Edit	11/18/2023	Pending	
Edit	12/16/2023	Pending	
Edit	01/13/2024	Pending	

Waiver Review Schedule

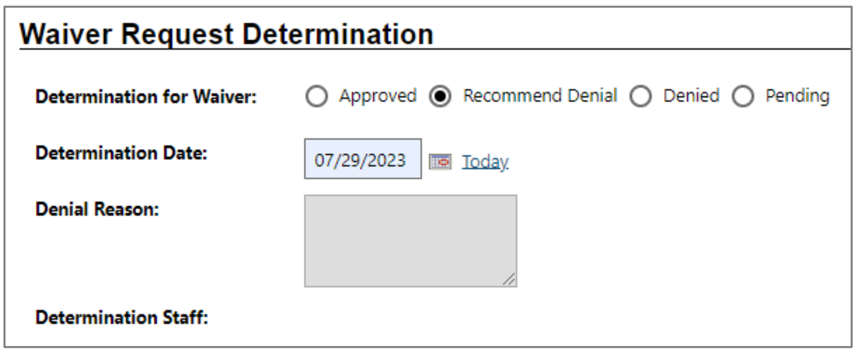
Program staff will see this schedule when they select the **Edit Waiver Entry** link. To learn more about the monthly waiver review process, see the TAA Waiver Reviews topic.

Note: Once the waiver is approved, staff must enter a TAA waiver service in the Trade Activities, Enrollment, Service ribbon for the duration of the waiver.

Waiver Request Denials

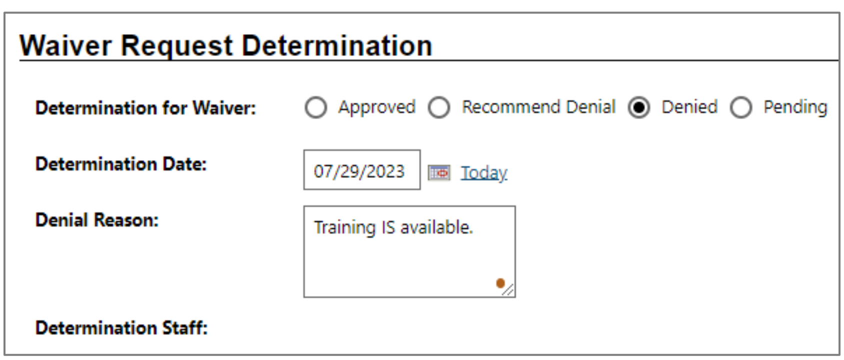
If TWC denies the waiver request, staff have two options to manage:

- **Recommend Denial** – TWC staff may select this option according to TWC policy, enter a **Determination Date**, and select **Save**. Optionally, they may enter a case note and/or attach supporting documentation as previously described.



Sample Recommend Denial Determination

- **Denied** – TWC staff may select this option to deny the request, enter a **Determination Date**, enter a **Denial Reason**, and select **Save**. Optionally, they may enter a case note and/or attach supporting documentation as previously described.



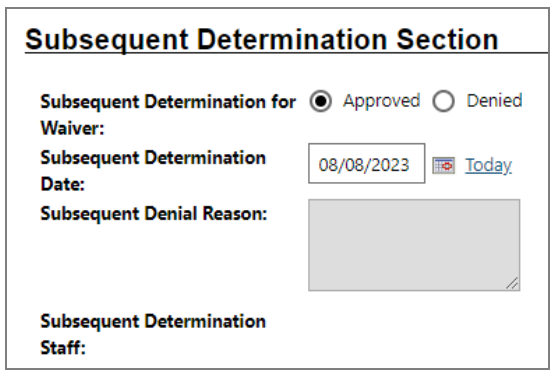
Sample Denied Determination

Note: The Determination Staff's credentials will be displayed after a determination is saved successfully.

Subsequent Determination

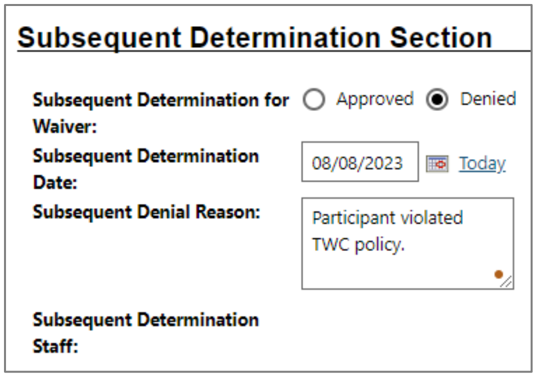
According to TWC policy, training participants whose TAA waiver requests have been denied may be eligible to appeal the decision. In this scenario, staff will work with the client to manage appeal workflow requirements.

- If the appeals outcome favors TAA waiver approval, authorized staff may access the waiver's Subsequent Determination Section, select **Approved**, enter the **Subsequent Determination Date**, and select **Save**. Optionally, they may enter a case note and/or attach supporting documentation.



Sample Approved Subsequent Determination

- If the appeals outcome favors TAA waiver denial, authorized staff may access the waiver's Subsequent Determination Section, select **Denied**, enter the **Subsequent Determination Date**, and select **Save**. Optionally, they may enter a case note and/or attach supporting documentation.



Sample Denied Subsequent Determination

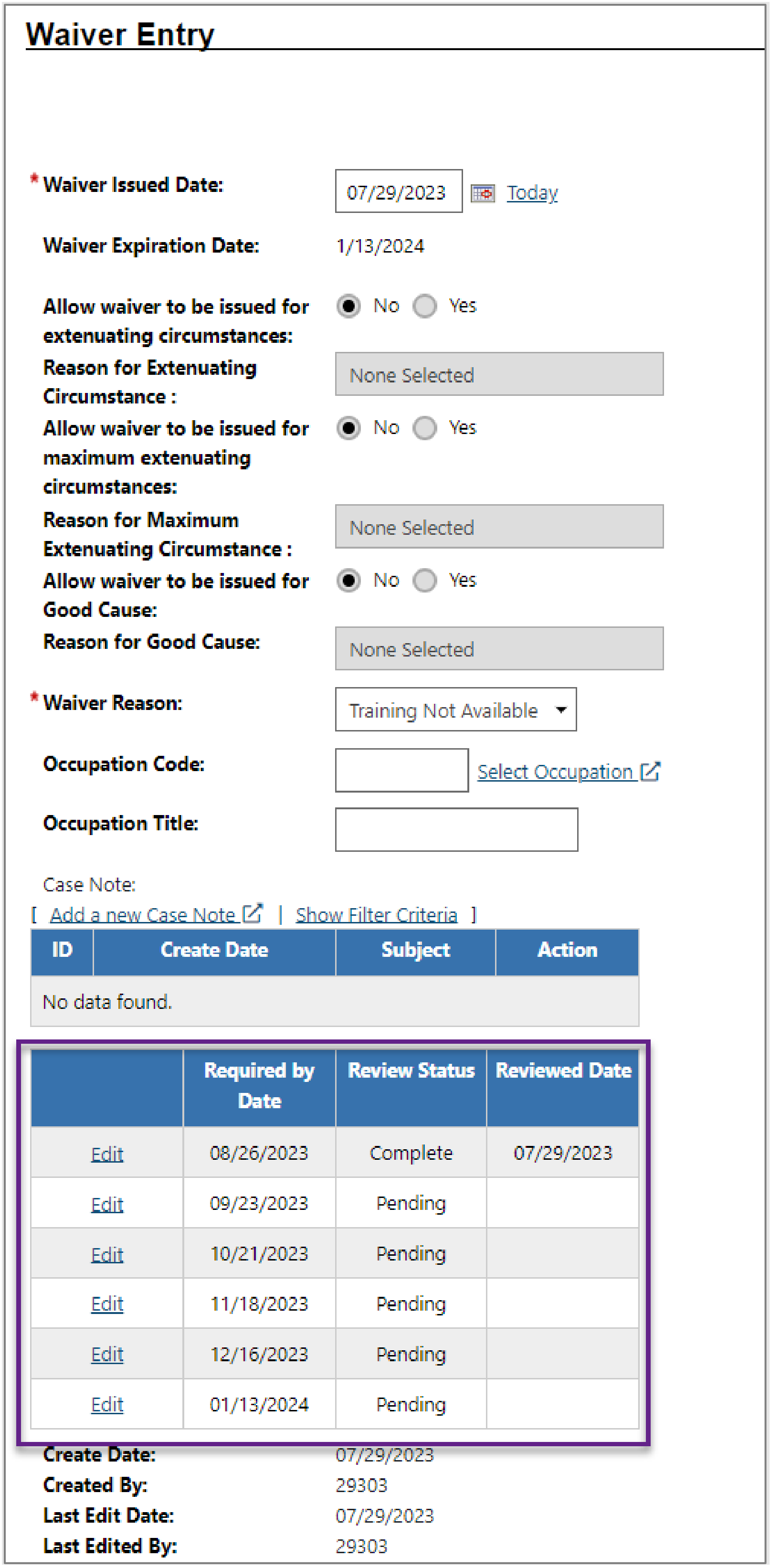
Note: The system informs the participant and the program/case manager of the State’s subsequent determination via the Message Center.

TAA Waiver Reviews

To perform monthly reviews for approved waiver requests:

1. Click the **Waiver Entry** ribbon to expand its contents.

2. Click the **Edit Waiver Entry** link from the Programs tab screen, which displays the TAA Waiver Entry screen listing the weeks for required reviews at the bottom of the form (shown in the figure below).



Waiver Entry

* Waiver Issued Date:	07/29/2023 Today
Waiver Expiration Date:	1/13/2024
Allow waiver to be issued for extenuating circumstances:	(•) No ( ) Yes
Reason for Extenuating Circumstance :	None Selected
Allow waiver to be issued for maximum extenuating circumstances:	(•) No ( ) Yes
Reason for Maximum Extenuating Circumstance :	None Selected
Allow waiver to be issued for Good Cause:	(•) No ( ) Yes
Reason for Good Cause:	None Selected
* Waiver Reason:	Training Not Available
Occupation Code:	Select Occupation
Occupation Title:	

Case Note:
[Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
No data found.			

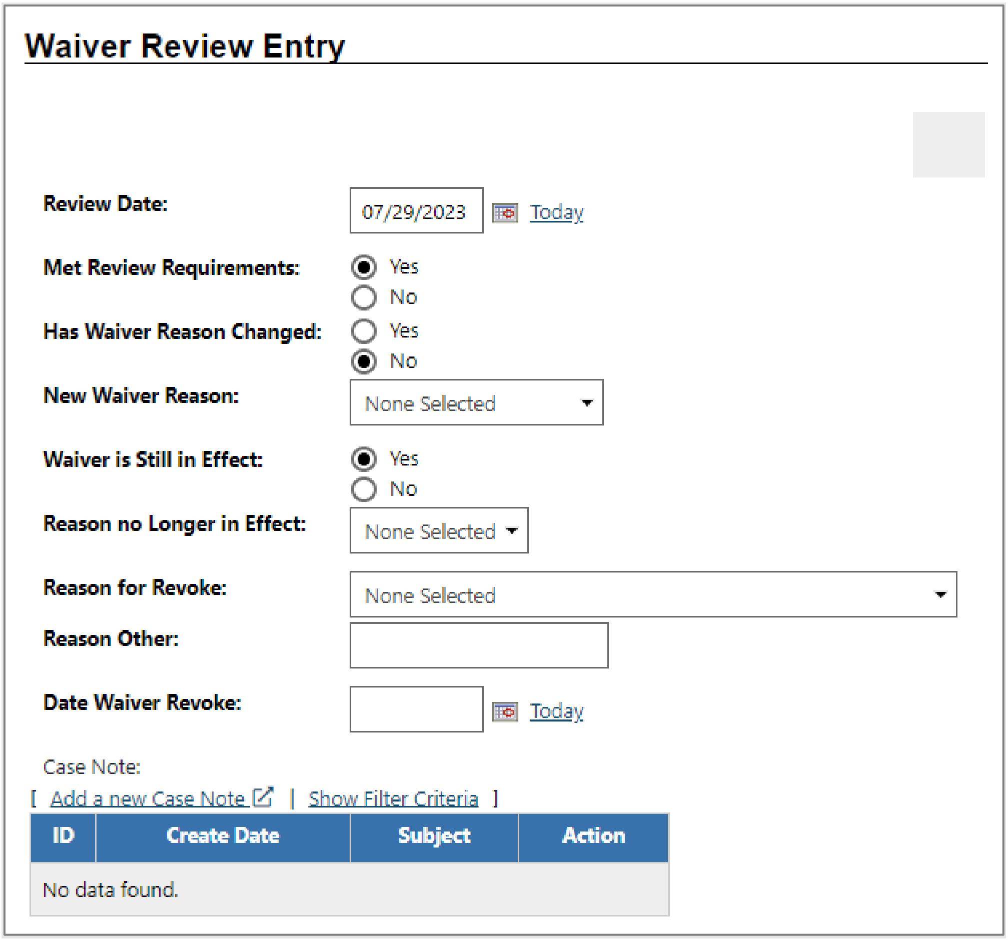
	Required by Date	Review Status	Reviewed Date
Edit	08/26/2023	Complete	07/29/2023
Edit	09/23/2023	Pending	
Edit	10/21/2023	Pending	
Edit	11/18/2023	Pending	
Edit	12/16/2023	Pending	
Edit	01/13/2024	Pending	

Create Date:	07/29/2023
Created By:	29303
Last Edit Date:	07/29/2023
Last Edited By:	29303

Updated Waiver Entry Screen with Waiver Review Schedule

3. Click the **Edit** link for the appropriate review date.

4. Perform waiver review data entry to complete the form.



Waiver Review Entry Screen

i. Did the participant meet review requirements? (**Y/N**).

ii. Has the waiver reason changed? (**Y/N**).

1) If Yes, what is the new waiver reason? (**Make selection**).

2) If No, continue to the next field.

iii. Is the waiver still in effect? (**Y/N**).

1) If Yes, continue to the next field.

2) If No, select **Revoked** for Reason no longer in effect.

3) Select a Reason for Revoke (**make selection**).

Note: If staff selects Other, they must enter text in the Reason Other field.

4) Enter a waiver revocation date.

5. If applicable, enter a case note.

6. Click **Save** to continue.

The Waiver Review Schedule portion of the Waiver Review Entry form is re-displayed with the review status and review date.

- If the waiver is maintained (i.e., it remains in effect), WIT will display a waiver review schedule similar to the figure below. To conduct future reviews, staff will select the desired **Edit** link and perform the required data entry on or before the Required by Date.

	Required by Date	Review Status	Reviewed Date
Edit	08/26/2023	Complete	07/29/2023
Edit	09/23/2023	Pending	
Edit	10/21/2023	Pending	
Edit	11/18/2023	Pending	
Edit	12/16/2023	Pending	
Edit	01/13/2024	Pending	

Updated Waiver Review Schedule

Note: By default, WIT displays Edit links for the first six waiver reviews. If staff must access additional reviews, they may select the **Extend Waiver** link displayed beneath the waiver review schedule.

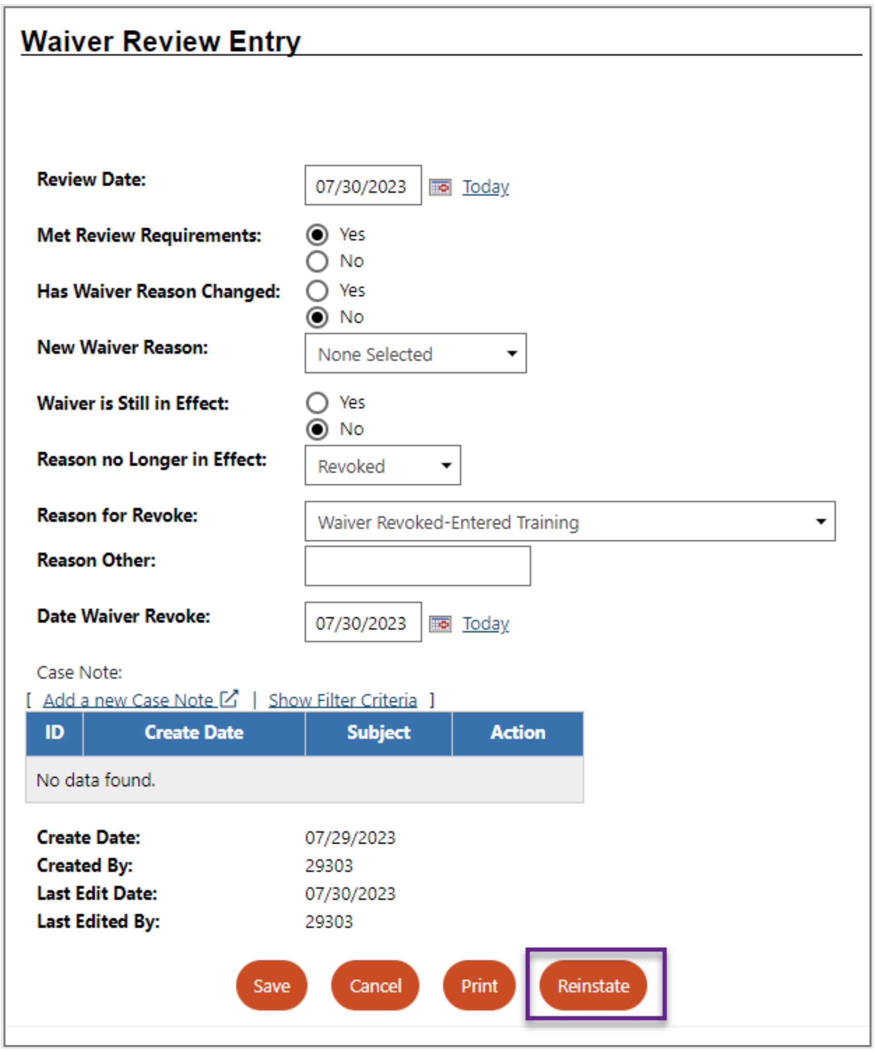
- If the waiver is revoked, WIT will display a waiver review schedule similar to the figure below.

	Required by Date	Review Status	Reviewed Date
Edit	08/26/2023	Complete	07/29/2023
Edit	09/23/2023	Complete	07/30/2023
Edit	10/21/2023	Closed	07/30/2023
Edit	11/18/2023	Closed	07/30/2023
Edit	12/16/2023	Closed	07/30/2023
Edit	01/13/2024	Closed	07/30/2023

Waiver Review Schedule Displaying Closed Statuses Following Waiver Revocation

Reinstating a Waiver

If for some reason the waiver must be reinstated (thus continuing to maintain a hold status on the individual's training service), staff will conduct a waiver review by selecting a desired **Edit** link and select the **Reinstate** button to reverse the waiver revocation previously created.



Waiver Review Entry Screen Showing Reinstate Button

- If you use the Reinstate button to reinstate the waiver, then every Review Status from that one forward is changed back to Pending, with the Reviewed date cleared.

- Click **Save** on the TAA Waiver Entry screen to continue. The system redisplays the Programs tab.

Trade Training Application

Training Objectives

After completing this lesson, you will be able to:

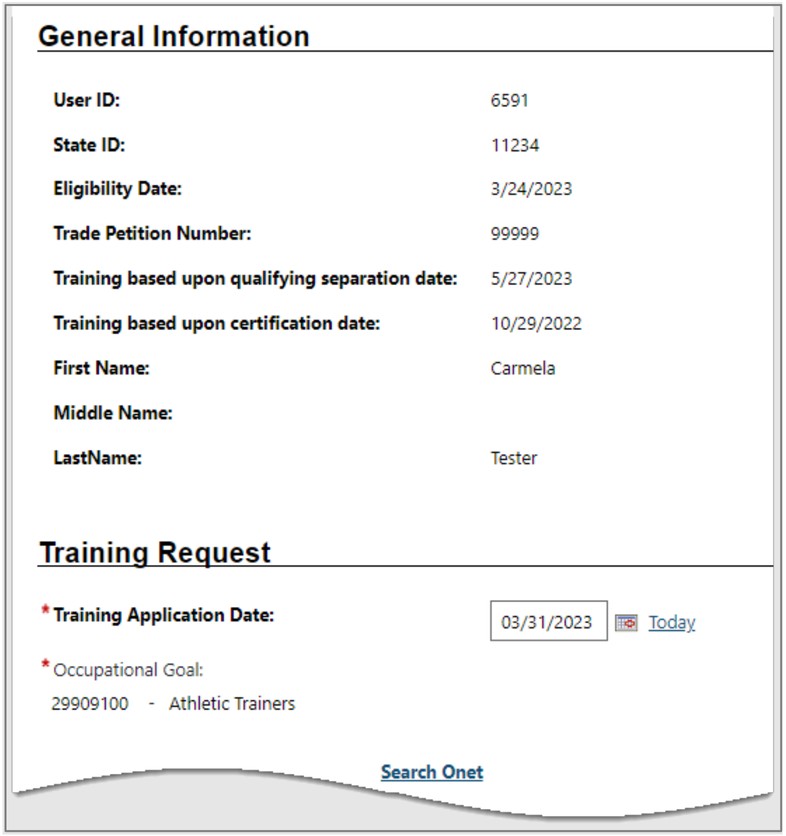
- Locate the Trade Training Application form.
- Complete the Trade Training Application form.

The TAA Training Application form (sometimes referred to as a sub-application of TAA) is used to gather required answers to questions about the worker's suitability and qualification for the training, as well as the school, program, and provider of the training.

Note: An Approved Training Application should always be created before enrolling the individual in any Training activities.

To create a TAA Training Application:

1. Click to open the Training Applications ribbon, then click the **Create Training Application** link from the Programs tab screen, which displays the TAA Training Application screen (shown in the figure below).



TAA Training Application Screen

2. In the Training Request section:

    i. Enter the Training Application Date.

    ii. Select the **Search Onet** link to search for and select the Occupation Goal.

3. In the Program section, select the **Add Provider / Program** link to search for and select the desired information.

4. In the Training Criteria section, select Yes or No to answer each of the listed questions.

5. (Optional) In the Training Decision section, enter a case note.

6. (Optional) In the Documents Available section, obtain supporting documentation from the custom to be associated with their account profile.

7. Click **Save** to continue. The system redisplays the Programs tab screen with an **Edit Approved Training Application** link under the **Create Approved Training Application** link. The link (which indicates the Approved Training issue date) can be used to reopen and edit the existing Approved Training application (including adding the school/program).

Programs Tab: TAA Approved Training Screen

Authorized staff will be notified via the Message Center when pending approvals are required. They will access the record and approve or deny the request, enter the decision date, and if applicable, a denial reason. When they save the record, the system will display the reviewer’s name and inform the case manager and TAA participant of the decision via Message Center notification.

Trade Training Benchmarks Ribbon

Training Objectives

After completing this lesson, you will be able to:

- Understand what the Training Benchmark Review form is used for.
- Complete the Training Benchmark form.

The TAA training benchmark screen is designed to allow staff to record training benchmarks (or status updates) as required by the USDOL. Benchmark reviews are required every 60 days. There will also be a table display of all completed benchmark reviews.

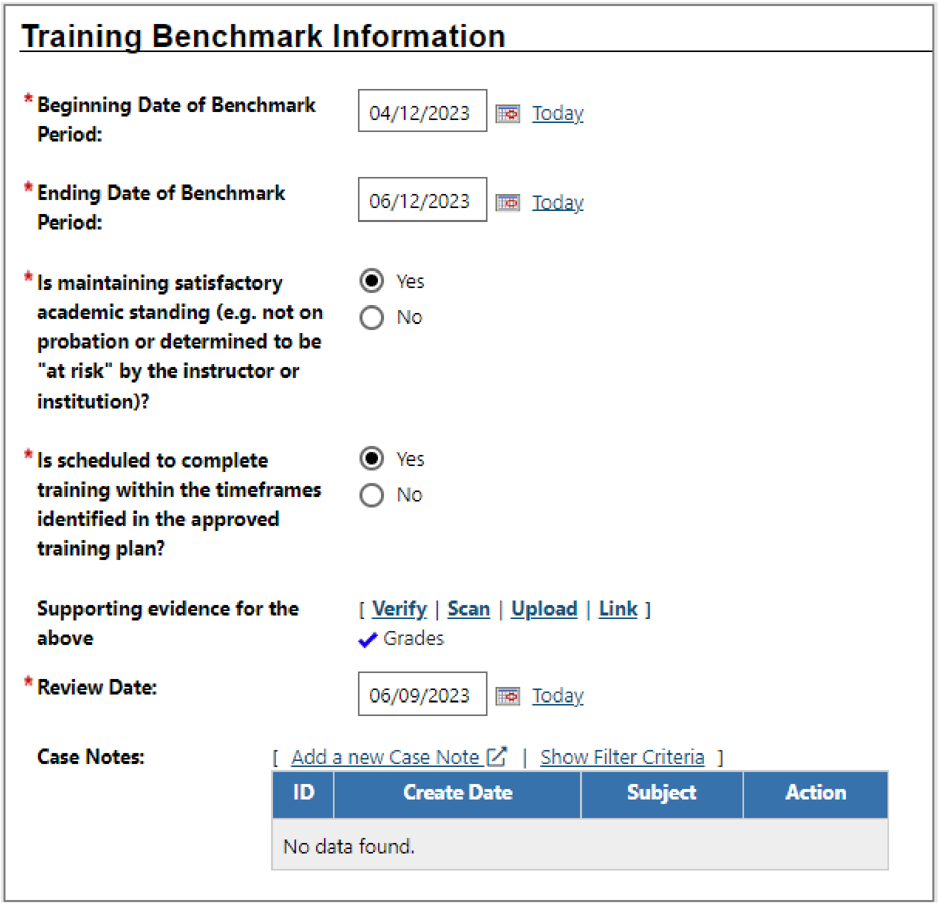
Note: An approved training service must be recorded before staff can create a TAA training benchmark.

To create a Trade Training Benchmark record for the assisted individual:

1. Click the **Training Benchmarks** ribbon and select the View Training Benchmarks link to begin.

Note: If benchmark information was previously recorded, the system will display these details in table format.

2. Click **Add Training Benchmark** to access the Add New training benchmark screen, as shown below.



Add Training Benchmark Screen, Training Benchmark Information Section

3. In the General Information section, review summary information from the qualifying training event.

4. In the Training Benchmark Information section, provide the following information:

   i. Benchmark period begin date.

   ii. Benchmark period end date.

   iii. Satisfactory academic standing? (Yes/No).

   iv. Scheduled to complete training on time? (Yes/No).

v. Select **Verify**, **Scan**, **Upload**, or **Link** to identify verification documentation provided by the individual.

vi. Date of benchmark review.

vii. (Optional) Add a new case note.

5. Click **Save** to secure your edits.

Trade Measurable Skills Gain (MSG) Ribbon

Training Objectives

After completing this lesson, you will be able to:

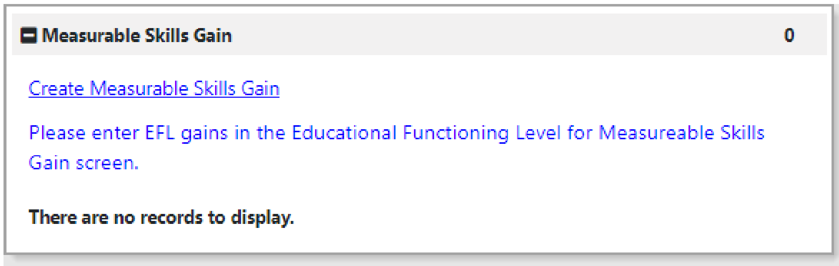
- Locate the Educational Functioning Level for Measurable Skills Gain ribbon.
- Perform data entry.

Measurable Skills Gain is a metric to show improvements that occurred during program participation. The Skill Achievement form is designed for use in programs where Measurable Skills Gain performance measures apply. This includes Title I WIOA, as well as Title II Adult Education, Title III Wagner-Peyser, and Title IV Vocational Rehabilitation. The Skill Achievement form lets you record data for multiple skill types and identify an associated achievement type.

Note: The WIT system's configuration enables staff to collect this data for the TAA program.

To record a Measurable Skills Gain for a client:

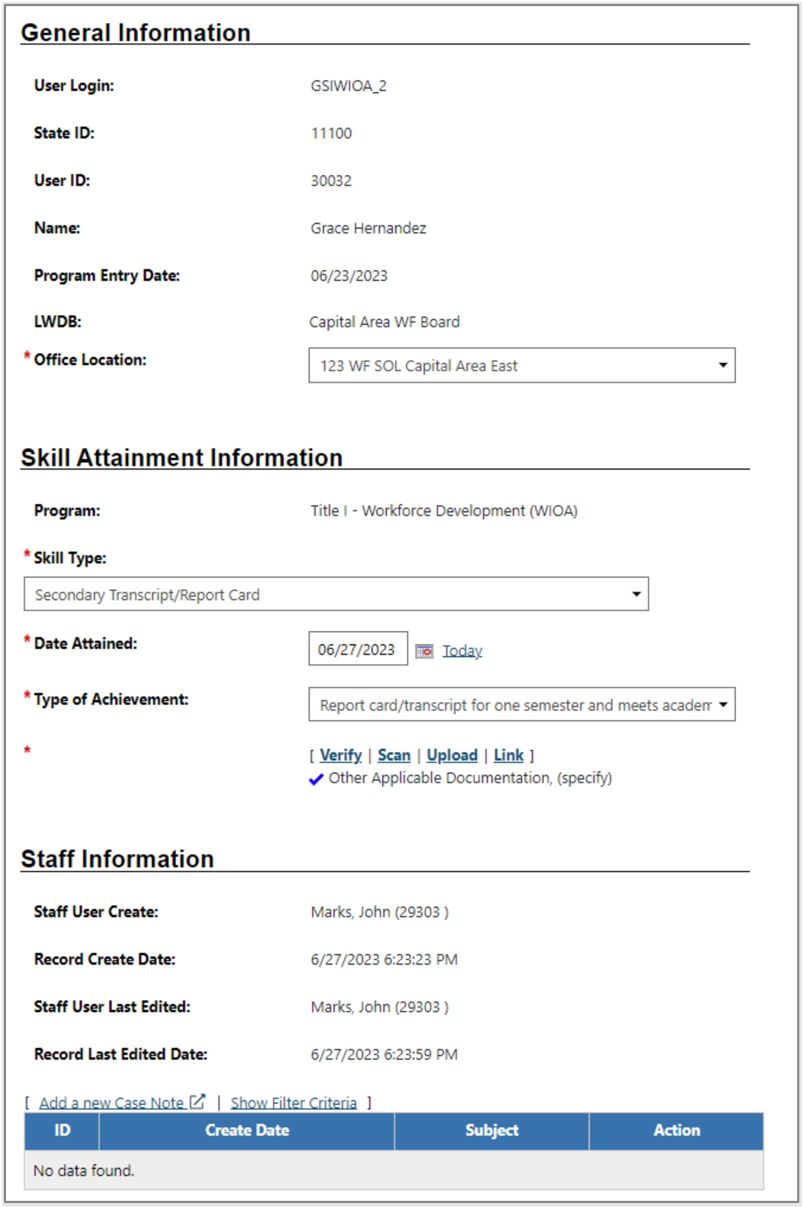
1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon** to expand their Trade Application panel.
3. Click the **plus sign icon** to expand the Measurable Skills Gain panel and click the **Create Measurable Skills Gain** link (see figure below).



Measurable Skills Gain Panel and Link

The Skill Achievement entry page displays (see figure on next page).

4. Select/confirm the local workforce development board (LWDB) and Office Location.
5. In the Skill Attainment Information section, select the Skill Type attained.
6. Enter the Date Skill Attained.



General Information

User Login:	GSIWIOA_2
State ID:	11100
User ID:	30032
Name:	Grace Hernandez
Program Entry Date:	06/23/2023
LWDB:	Capital Area WF Board
* Office Location:	123 WF SOL Capital Area East

Skill Attainment Information

Program: Title I - Workforce Development (WIOA)

* Skill Type:

Secondary Transcript/Report Card

* Date Attained: 06/27/2023 Today

* Type of Achievement: Report card/transcript for one semester and meets academ

* [Verify | Scan | Upload | Link]

✔ Other Applicable Documentation, (specify)

Staff Information

Staff User Create:	Marks, John (29303)
Record Create Date:	6/27/2023 6:23:23 PM
Staff User Last Edited:	Marks, John (29303)
Record Last Edited Date:	6/27/2023 6:23:59 PM

[Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
No data found.			

Skill Achievement Entry Page

7. Select the Type of Achievement.

8. Specify the document used to verify the achievement:

    i. Click the **Verify** link and select verification type.

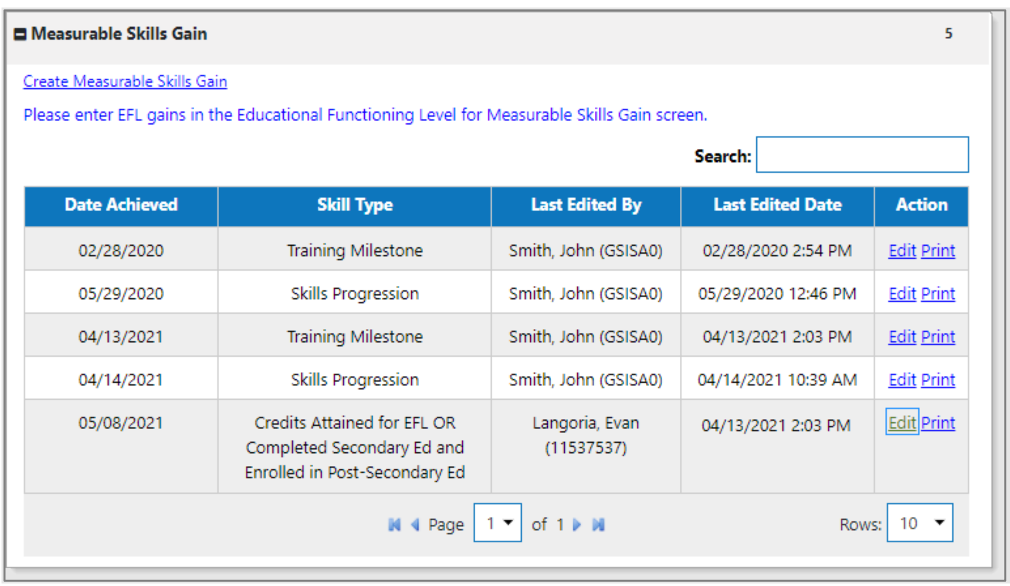
    ii. Enter the document title used for verification.

    iii. Click the **Verify** link again to collapse the list.

Note: You can click a **Scan**, **Upload**, or **Link** hyperlink to attach a copy of the verifying document. For more information see the System Overview training video.

9. To add a case note, click the **Add a new Case Note** link in the Staff Information section, complete the applicable fields in the displayed Case Note page, and click **Save** to return to the Skill Achievement page. For more information, see the System Overview training video.

10. Click **Save** to complete and save the Skills Gain record. The Measurable Skills Gain panel redisplays with the Skills Gain record displayed in a table (see figure below).



Measurable Skills Gain 5

Create Measurable Skills Gain

Please enter EFL gains in the Educational Functioning Level for Measurable Skills Gain screen.

Search:

Date Achieved	Skill Type	Last Edited By	Last Edited Date	Action
02/28/2020	Training Milestone	Smith, John (GSISA0)	02/28/2020 2:54 PM	Edit Print
05/29/2020	Skills Progression	Smith, John (GSISA0)	05/29/2020 12:46 PM	Edit Print
04/13/2021	Training Milestone	Smith, John (GSISA0)	04/13/2021 2:03 PM	Edit Print
04/14/2021	Skills Progression	Smith, John (GSISA0)	04/14/2021 10:39 AM	Edit Print
05/08/2021	Credits Attained for EFL OR Completed Secondary Ed and Enrolled in Post-Secondary Ed	Langoria, Evan (11537537)	04/13/2021 2:03 PM	Edit Print

Page 1 of 1 Rows: 10

Measurable Skills Gain Panel with Entries in Table

Educational Functioning Level (EFL) for Measurable Skills Gain (MSG) Ribbon

Training Objectives

After completing this lesson, you will be able to:

- Understand how the Educational Functioning Levels (EFLs) work and how they assist with documenting assessment achievements.
- Complete an EFL Pre-Test in one of the Assessment Types.
- Complete a Post-Assessment Test, showing progress over time.

Staff can record required EFL tests and create measurable skills gains for customers identified as being basic skills deficient by using EFL forms to record standardized assessment results (e.g., CASAS or TABE) that correlate with EFL definitions outlined by the National Reporting System (NRS). You can track progress toward improving functional area deficiencies as you enter pre-test and post-test assessment results for the participant.

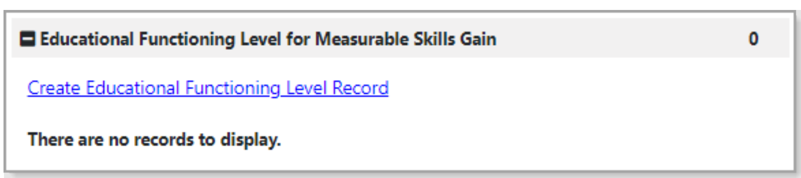
Creating an EFL Pre-Test Record

You can create an EFL record for an initial pre-test as soon as a TAA Application is complete. A link at the top of the Educational Functioning Level for Measurable Skills Gain panel lets you create the pre-test record before assessment services start.

Creating the pre-test, and later the post-tests, includes assigning an EFL from six selections: 1) Beginning Literacy; 2) Beginning; 3) Low Intermediate; 4) Middle/High Intermediate; 5) Low Adult/High Intermediate; and 6) Adult/High Adult. If an individual's skills have improved sufficiently to be placed in one or more higher levels by post-tests, an advance is recorded. This advance process occurs every program year, between July 1 and June 30.

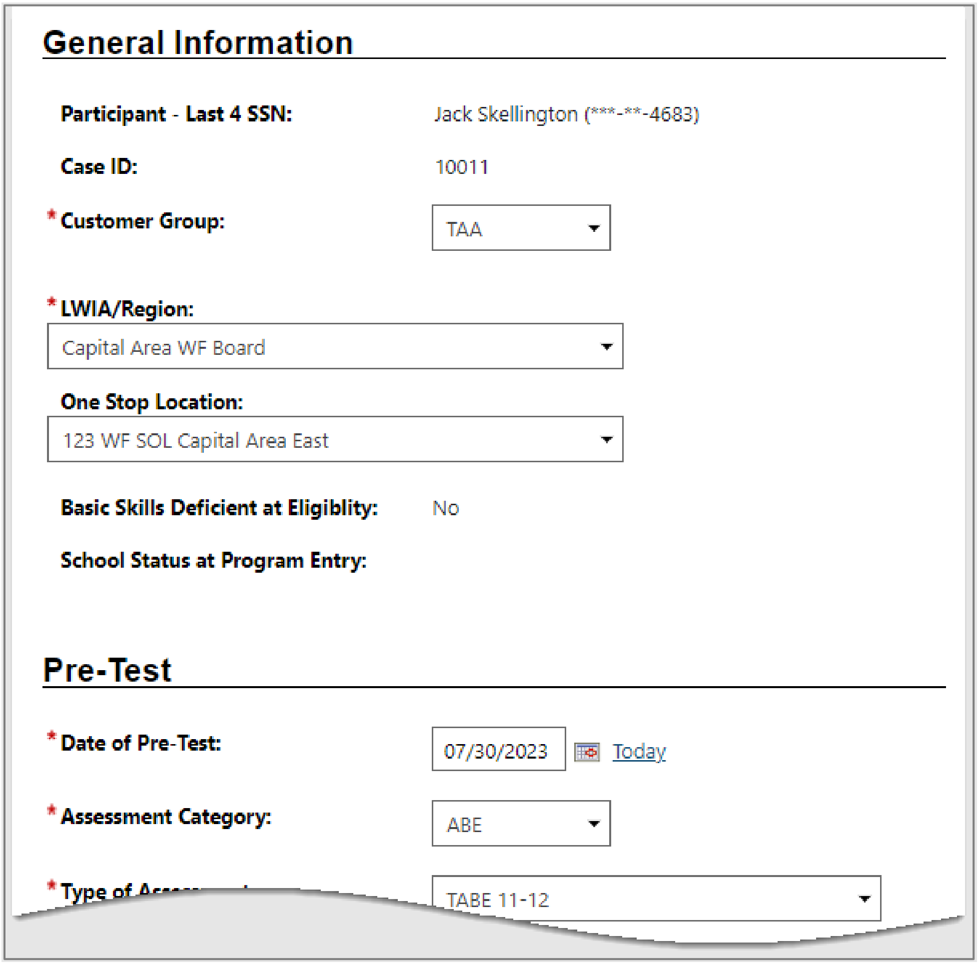
To create an Educational Functioning Level Pre-Test record:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon** to expand their TAA Application panel.
3. Click the **plus sign icon** to expand the Educational Functioning Level for Measurable Skills Gain panel and click the **Create Educational Functioning Level Record** link (see figure below).



Educational Functioning Level for Measurable Skills Gain Panel and Link

The **Educational Functioning Level** entry page displays to enter pre-test data.



Educational Functioning Level Page for Adding a Pre-Test

4. In the General Information section, select/confirm the Customer Group, LWIA/Region, and One Stop Location.
5. In the Pre-Test section, enter the Date of Pre-Test.
6. Select the Assessment Category for the test taken (ABE or ESL).
7. Select the Type of Assessment taken in that category.
8. Select the Functional Area of the assessment.

9. If you know the Assessment Form/Version Info, you may enter it.

10. Enter the Pre-Test Score. The score (along with the Assessment Category, Type of Assessment, and Functional Area) determines the values of two of the next three fields: Educational Functioning Level and Score reflects Basic Skills deficient (Yes or No). You may click anywhere outside of this field to see the system-set value display for the customer's EFL.

Notes: If the Assessment Type is not a standardized assessment, like CASAS or TABE, the Educational Functioning Level is not determined by the system and must be selected.

Basic skills deficient means a program participant with English reading, writing, or computing skills at or below the 8th grade level on an accepted standardized test; or an individual who is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual's family, or in society.

11. If you know the Grade Level Equivalent, you may enter that.

12. (Optional) To add a new case note, select the self-titled link to access the Case Note Composition screen.

13. Click **Save** to complete the EFL record. The Educational Functioning Level panel redisplays with the pre-test record shown in table format.

Adding an EFL Post-Test Record

Once a pre-test record is saved, you can add a post-test record to track progress for an assessment that changes the participant's EFL to a higher level.

Note: The system will not accept a post-test record whose create date is prior or equal to the pre-test record's create date.

To create an Educational Functioning Level Post-Test record:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon** to expand their TAA Application panel.
3. Click the **plus sign icon** to expand the Educational Functioning Level for Measurable Skills Gain panel.

Create Educational Functioning Level Record

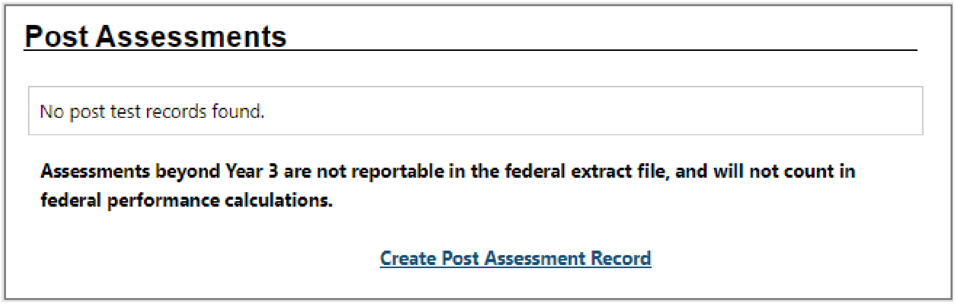
Search:

Funct Area / Assessment	Pre-Test		1st PY Post-Test		2nd PY Post-Test		3rd PY Post-Test	
	Date (PY)	EFL (Category / Level)	Date (PY)	EFL (Category / Level)	Date (PY)	EFL (Category / Level)	Date (PY)	EFL (Category / Level)
Reading / TABE 11-12	06/23/2023 (22)	2 (ABE / Level 2)						

Educational Functioning Level Summary Table

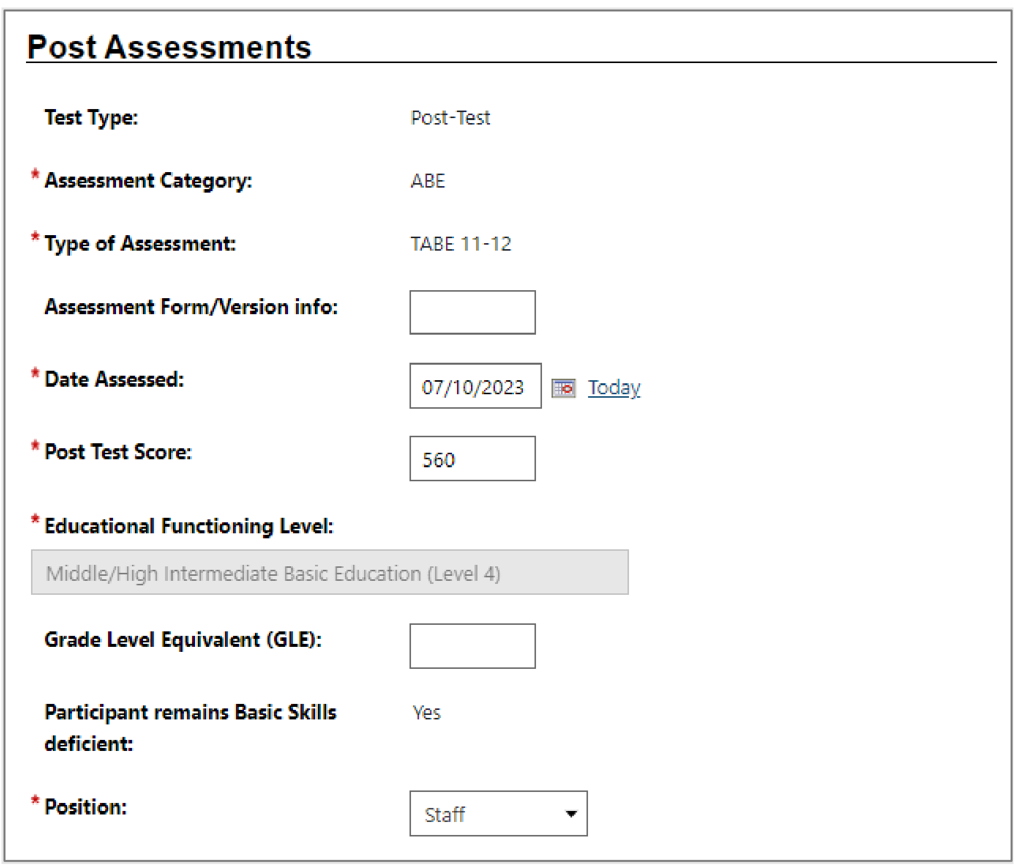
4. From the table view, click a link for the desired test in the Funct Area/Assessment column (see figure above).

5. Click the **Create Post Assessment Record** link at the bottom of the Educational Functioning Level Edit page to display a new Post Assessments section (see figure below).



Create Post-Assessment Record Link

The Post Assessments section expands for entering the new assessment information (see figure below).



Post Assessment Section

6. In the Post Assessments section, enter the Assessment Form/Version Info, if known.
7. Enter the Date Assessed for the post-test.
8. Enter the Post Test Score. The new score will automatically change the Educational Functioning Level if the progress made reflects a new level.
9. If you know the Grade Level Equivalent, you may enter that.
10. Select your Position.
11. Click **Save** to add the post-test to the EFL record. The Educational Functioning Level for Measurable Skills Gain panel redisplays with the post-test record displayed in the table.

TAA/TRA Program Benefit Payments Ribbon

Training Objectives

After completing this lesson, you will be able to:

- manage TAA cost requirements, per State policy.
- Provide benefit payments for travel allowances, subsistence, and/or training costs.

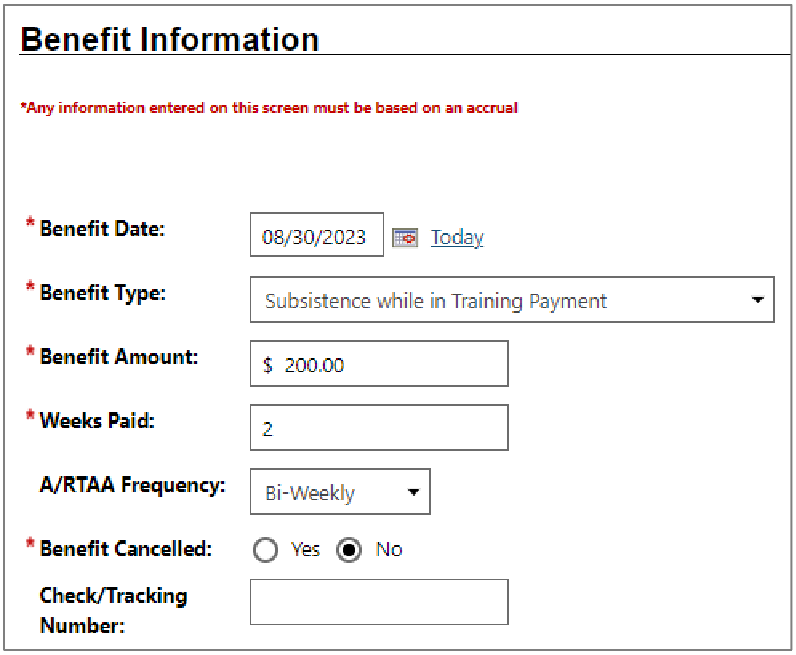
Authorized staff may use the TAA/TRA Program Benefit Payments Ribbon to enter travel (mileage), subsistence, and training costs for program participants. Local boards will be required to enter each cost at the time of accrual, as outlined in WD Letter 10-21. All accrued costs starting from the Spring Semester 2024 must be entered here.

The State office will continue to enter all Job Search and Relocation Allowance payments.

To enter TAA/TRA Benefit Payments:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the **plus sign icon** ⊞ to expand their TAA Application panel.
3. Click the **plus sign icon** ⊞ to expand the TAA/TRA Program Benefit Payments panel.
4. Click the **View TAA/TRA Program Benefit Payments** link. If benefit payment information was previously entered, WIT will display this information in table format.

5. Click the **Add TAA/TRA Program Benefit** link.



Enter TAA/TRA Benefit Information Screen

Note: The entry screen and data entry requirements are the same for each benefit type.

6. Enter the benefit date.
7. Select the benefit type.
8. Enter the benefit amount.
9. Enter the number of weeks paid.
10. Select the frequency.
11. Maintain the **No** response for benefit cancellation.
12. (Optional) Enter the check number or tracking number.
13. Click **Save**.

As a result of performing data entry, the system will update the TAA/TRA Program Benefit Payments screen as shown below.

Benefit Summary

Benefit Type	Total Weeks	Total Benefit Amount	Total Number of Payments	Total Overpayment Amount	Total Overpayments Recovered
Subsistence in Training	2	200.00	1	0.00	0.00

Filter Criteria

Add TAA/TRA Program Benefit

ID	Benefit Type	Benefit Date	Benefit Amount	Weeks Paid	Check/Tracking #	Login Name	Cancelled	Action
4	Subsistence while in Training Payment	08/30/2023	200.00	2		GSISA0	No	View Delete

Page 1 Of 1 Rows 5

Updated TAA/TRA Program Benefit Payments Screen

As shown above, the top table displays cumulative summary information of all payment benefits entered while the bottom table displays the last benefit payment information entered.

Closure Ribbon

Training Objectives

After completing this lesson, you will be able to:

- understand the steps involved in preparing a participant for soft exit.
- knowledge of how the exit process functions in the system.
- successfully close all services in the service table in preparation for soft exit.
- successfully close the IEP. This includes closing all objectives, goals, and all completion dates.
- successfully complete the Closure Form.
- understand how to delete a Closure if additional services are necessary.

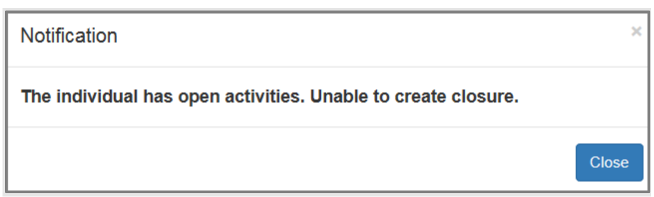
Staff complete the Case Closure form to officially stop planned service delivery for a program participant. Completion of this form confirms that WIT will no longer display program services for staff selection in the Activities / Enrollments / Services ribbon (located in the TAA program area of the Programs tab screen). Within the TAA program workflow, case closure prepares a program participant for the eventual soft exit process, which occurs when the individual failed to receive program services for at least 90 consecutive days.

Note: Case Closure is NOT Case Exit. The latter can be achieved through system automation (soft exit) or manual Exit form completion (hard exit).

To create a TAA Closure:

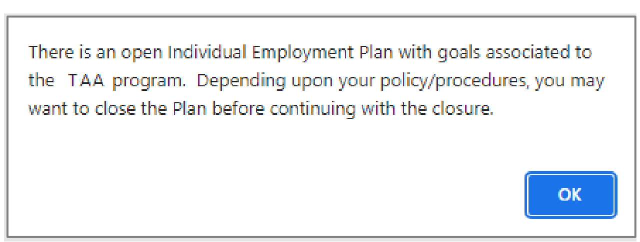
1. Assist a TAA program participant.
2. Access the Programs tab of Staff's Case Management Profile.
3. Open/expand the TAA program area.
4. Click to open and expand the Closure ribbon.
5. Click the **Create Closure** link to access the Closure form (as shown in the figure on the following page).

- If you click **Create Case Closure** from the Programs Tab and activities are still open, the system displays a pop-up alert like the following.



Unable to Create Closure Notification

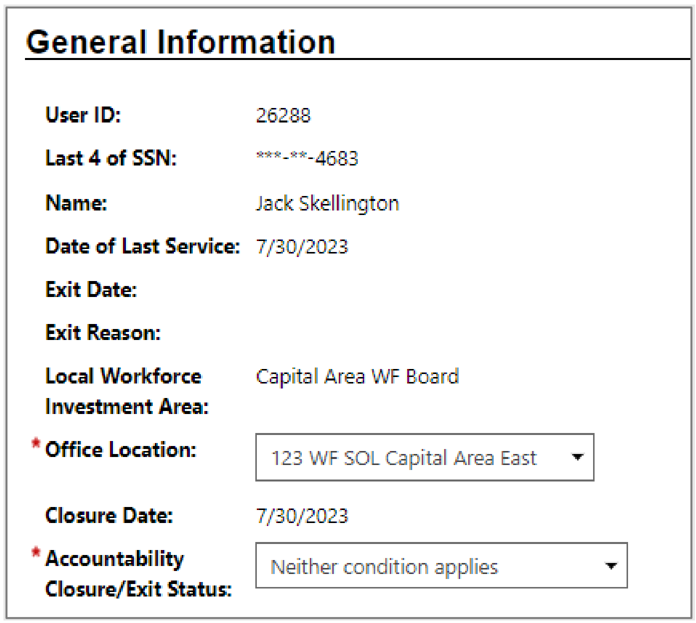
- To continue, staff must click **Close** to clear the notification, and then manually close each open activity.
- Similarly, if the IEP, its goals, and/or its objectives remain open, the system will display the following notification window:



Open IEP Notification Window

- Staff must click **OK** to remove the message, and if required, close the IEP objectives first, followed by the IEP goals, followed by the plan itself.

Note: If the customer is co-enrolled in multiple federal programs in WIT, other program staff will also manage the customer's IEP. Please follow agency policy re: closing an IEP.



Closure Screen General Info Section

6. On the General Info tab:

    i. Select your office location.

Note: The system displays the case closure date, which is the same date entered when completing the Case Closure form.

7. Select the customer's **Accountability Closure / Exit Status** value.

8. Select the desired **Case Closure Reason**.

9. Click **Next** to save your data entry and continue.

10. On the Employment Information tab select the customer's **Entered Employment** status.

    i. If Yes:

        1) Select the **Add Employer** link.

        2) Complete the Add/Edit Employer form.

        3) Click **Save** to complete the employment record.

    ii. If No, you may continue without adding employer information.

11. Select **Next** to save your data entry and continue.

12. On the Staff Info tab:

    i. (Optional) Click to add a new case note.

    ii. (Optional) Reassign the case to another case manager.

    iii. Confirm your staff position.

13. Select **Finish**.

Note: Once a TAA Case Closure form is created, a new program activity cannot be created for this enrollment period. If the customer must receive additional program services within this existing enrollment period, authorized staff must delete the TAA Case Closure form.

Trade Exit/Outcome Ribbon

Training Objectives

After completing this lesson, you will be able to:

- understand the difference between case closure and case exit/outcome.
- understand the global exclusion types that define an exit/ outcome, and how a TAA case is identified when an exit form is completed.
- successfully complete the Exit/Outcome Form.
- understand how to delete an Exit/Outcome form if necessary.

According to USDOL guidelines, staff need only create a TAA Exit/ Outcome (aka, hard exit) if the individual satisfies one of the established global exclusions, or if they will be served under a new TAA petition. Otherwise, staff need not complete the Exit / Outcome form to initiate the individual's soft exit from the TAA program. The system will automatically exit the customer from the program as a soft exit routine when the individual has not received a program service for 90 consecutive days.

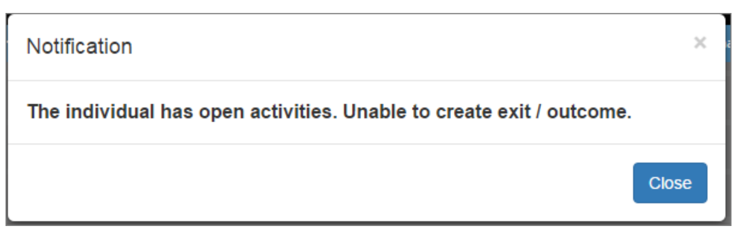
The WIT system is configured to execute the Combined Soft Exit procedure if the customer is co-enrolled in two (or more) federal programs simultaneously, including WP, WIOA, SNAP E&T, and Choices. This means the customer is an active program participant until staff enters actual end dates for all program services. In this scenario, the system will record as the Soft Exit date the most recent actual end date for any program service provided to the customer.

To manually terminate the individual's participation in the TAA program (i.e., create a hard exit), perform the following steps:

1. Assist a TAA program participant.
2. Access the Programs tab of Staff's Case Management Profile.
3. Open/expand the TAA program area.
4. Click to open and expand the Exit / Outcome ribbon.
5. Click the **Create Exit/Outcome** link (see sample below).

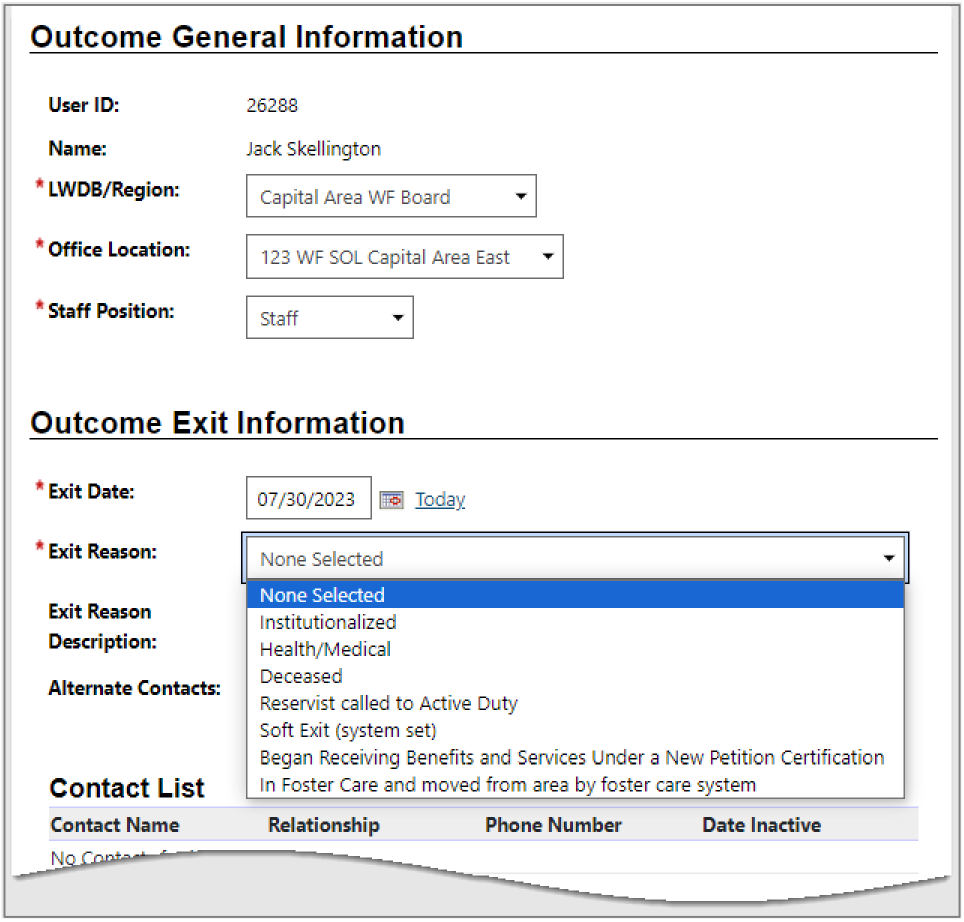
Programs Screen with Create Exit/Outcome Link

- The system will check to ensure that all TAA activities have been closed properly. If any remain open, the system will display a notification like the following:



Open Activities Alert

- To continue, staff must manually close out open TAA activity services. Otherwise, the system will display the Outcome form (as shown in the following figure):


Outcome General Information

User ID: 26288
Name: Jack Skellington
*LWDB/Region: Capital Area WF Board
*Office Location: 123 WF SOL Capital Area East
*Staff Position: Staff

Outcome Exit Information

*Exit Date: 07/30/2023 Today
*Exit Reason: None Selected
None Selected
Institutionalized
Health/Medical
Deceased
Reservist called to Active Duty
Soft Exit (system set)
Began Receiving Benefits and Services Under a New Petition Certification
In Foster Care and moved from area by foster care system
Exit Reason Description:
Alternate Contacts:

Contact List

Contact Name	Relationship	Phone Number	Date Inactive

TAA Exit / Outcome Form

6. Complete the General Information, Exit Information, and Staff Information sections.

7. When finished, click the **Save** button to secure your edits and return to the updated Programs tab.

Note: Because the WIT system is configured to execute Combined Soft Exits, creating a hard exit for one program will trigger the system to automatically close all other programs for which the customer is co-enrolled. This includes TAA, Wagner-Peyser, SNAP E&T, and/or Choices.

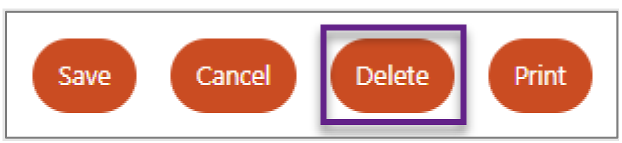
Deleting TAA Outcomes

Upon successfully completing the TAA Exit / Outcome form, the system displays the updated ribbon, a sample of which follows:

Edit Exit / Outcome Link

To delete this record, staff selects the **Edit Exit / Outcome** link. The Delete button is only available to authorized staff once you have saved this form. By deleting the form, the individual will return to their previous status, whether that was counting down towards the soft exit procedure or continuing to receive program services.

To delete this record, staff selects the **Delete** button.



Delete Button at bottom of Exit / Outcome Form

In response, the system will display a notification window to confirm your intention. To remove the message, click **OK**.