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

Approved by the

Texas Workforce Commission

Training and Development Department

Training and Development Mission

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

Texas Workforce Commission

Training and Development Department

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Contents

TAA Program: Case Management Training

This manual contains the exercises for the WorkinTexas.com (WIT) Trade Adjustment Assistance (TAA) program case management training class.

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

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

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

Guidance for Using This Workbook

In the exercises:

- Hyperlinks are **bolded** and **underlined**.

- The term Customer and Individual are used interchangeably.

Staff Functions

The exercises in this manual attempt to simulate the functions you will perform to manage Trade program participants.

Exercise #1: Login as Staff

Objective: Login as Staff.

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

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

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

1. Access the Home page according to the trainer's directions.

2. Click **Sign In / Register**.

3. Enter your assigned staff username.

4. Enter your assigned password.

5. Select the **I'm not a robot** checkbox for reCAPTCHA, if applicable.

6. Click **Sign In**.

7. Review Staff Sign-in Notice text.

8. Click **I agree**.

Exercise #2: Pin Links on My Staff Dashboard

Objective: Create shortcuts to popular staff commands.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and accessed My Staff Dashboard.

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

To set the Create Individual pinned link:

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

Tribar / Menu Link

2. Select **Manage Individuals > Create an Individual**.

3. Select the push pin displayed in the top left corner of the screen.

4. Select **Dashboard** from the top menu bar to return.

5. Do you see this pinned link displayed?

To set the Assist an Individual pinned link:

1. Access the left navigation menu.

2. Select **Manage Individuals > Assist an Individual**.

3. Select the push pin displayed in the top left corner of the screen.

4. Select **Dashboard** from the top menu bar to return.

5. Now you should have two pinned links. Moving forward, you may select either pinned link instead of accessing each command from the left navigation menu.

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

Exercise #3: Configure Dashboard Widgets Display

Objective: Set a preferred display for your dashboard widgets.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and accessed My Staff Dashboard.

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

To configure the display of your dashboard widgets:

1. Access My Staff Dashboard and select the **Configure Dashboard Widgets** link.

2. Select the **Check All** link.

3. Select **Save**. All available widgets should be displayed.

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

Exercise #4: Configure Dashboard Widgets Location

Objective: Set a preferred location for your dashboard widgets.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and accessed My Staff Dashboard.

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

To configure the location of your dashboard widgets:

1. Locate a desired widget.

2. Select and hold the top right corner of the widget.

3. Drag the widget to a different location within columns 1, 2 or 3, according to the **placement line** displayed.

4. Release the widget.

Exercise #5: Set Preferences within My Staff Account

Objective: Establish desired settings to control system behavior.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and accessed My Staff Dashboard.

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

To set preferences within My Staff Account:

1. Select **My Staff Account** from the top of My Staff Dashboard.

2. Locate the Preferences section.

3. For the Assist Individual Landing Page setting, select **Case Management – Programs Tab**.

4. For the Display # of Most recently assisted individuals and employers setting, select **20**.

5. For the Display new registrants in the most recently assisted individual and employer links: field, select **Yes**.

6. For the Summary Landing Page setting, select the following:

   - **Personal Profile – General Information Tab**.

   - **General Profile – Case Notes Tab**.

   - **Case Management – Programs Tab**.

   - **Case Management – Plan Tab**.

Summary Landing Page:	☑ Personal Profile - General Information Tab	☐ General Profile - Summary Tab
	☐ Personal Profile - Background Tab	☑ General Profile - Case Notes Tab
	☐ Personal Profile - Activities Tab	☐ General Profile - Activities (Staff) Tab
	☐ General Profile - Add Single WP Service Tab	☐ General Profile - Add Multiple WP Services Tab
	☐ Employment Plan - Job Applications Tab	☐ General Profile - Documents (Staff) Tab
	☑ Case Management - Programs Tab	☐ Employment Plan - Online Applications Tab
	☑ Case Management - Plan Tab	☐ Employment Plan - Virtual Recruiter Tab
	☐ Case Management - Assessments Tab	☐ Employment Plan - Employment Strategy Tab
	☐ Case Management - Case Summary Tab	

Summary Landing Page Options

7. For the Detail Landing Page setting, select the same checkboxes as the Summary Landing Page setting.

8. In the Staff Signature section, select **Capture Signature**.

9. Hold down the left mouse button and draw your signature, releasing the left mouse button to set spaces.

10. (Optional) Select **Remove My Signature** if you want to retry and repeat Step 9.

11. Select **Update Account**.

Exercise #6: Assist Individual from TAA Eligible Worker Layoff List

Objective: Locate and assist a Trade petition-related individual for the purpose of Trade case management training.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and accessed My Staff Dashboard.

Purpose: This exercise is necessary for staff to practice managing Trade case management tools and features in WIT.com.

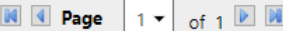**To assist a Trade eligible laid off worker:**

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 for the test individual assigned to you and click **Search**.

3. From the list of match results, click the **<u>Assist</u>** link for the assigned individual.

Note: If multiple search results display for the customer's name, use the last four digits of the SSN to identify the correct individual.

<u>User Name</u>	<u>First Name</u>	<u>Last Name</u>	<u>SSN</u>	<u>Employer Name</u>	<u>Petition Number</u>	<u>TAA Eligible</u>	Action	Select ▪
BDeer+@	Buck	Deer	0002	General Electric	98002	Yes	Assist	☐
							💾 ▾	Save List Update Existing List
		◀◀ ◀ Page 1 ▾ of 1 ▶ ▶▶					Rows	100 ▾

TAA Eligible Worker Layoff List Search Results Screen

Exercise #7: Perform Individual System Registration

Objective: Create a fictitious individual for the purpose of Trade case management training, if necessary.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and accessed My Staff Dashboard.

Purpose: This exercise helps State staff to practice managing Trade case management tools and features in WIT.com.

Note: Only State staff will create an account for individuals on the TAA Eligible Worker Layoff List, in limited circumstances.

To create an individual account:

1. Select the **Create an Individual** link from the left navigation menu under the **Services for Workforce Staff > Manage Individuals** menu.

2. In the Login Information section, enter a fictitious individual's username. **Make up this information** according to the business rules displayed in blue text and write down the information for future use.

3. Enter password, **Training@1.**

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

Login Information ❓

* User Name: _____

JTRAVOLTA1+

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

* Password: _____ 👁

●●●●●●●●●●

Strong!

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

* Confirm Password: _____ 👁

●●●●●●●●●●

* Security Question: _____

What is your mother's maiden name? ⌄

* Security Question Response: _____ 👁

●●●●●●●●●●

Special characters are not allowed.

Login Information Section of Create Individual Account Process

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

Name

* **First Name:** Jacob

Middle Initial:

* **Last Name:** Schneider

Name Section of Create Individual Account Process

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

Social Security Number

☐ I do not wish to provide my Social Security Number

Do not enter dashes (for example, 999001111)

Social Security Number (SSN): ....

Re-enter Social Security Number: ....

Social Security Number Section

7. In the Phone Number section, enter the individual's primary phone number **(make one up)**.

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

E-mail Address

Primary E-mail:

Create E-mail Account ⤴

Read Our E-mail Security Policy ⤴

Confirm Primary E-mail Address:

Email Address Section of Create Individual Account Process

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

Primary Location Information

* **Country:**   United States ▾

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

Primary Location Information Section

10. In the Residential Address section, select whether the individual is homeless, **No**.

11. Enter their address details accordingly **make one up using local fictitious information.**

12. In the Demographic Information section, enter the individual's date of birth, **05/15/1994**.

13. Select their gender **(your choice)**.

14. Select their Foster Care status, **No**.

Demographic Information

* **Date of Birth:** 08/01/1988 (MM/DD/YYYY)

You indicated your date of birth as August 1, 1988.

Age: 34

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

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

Demographic Information Section

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

15. In the Citizenship section, indicate the individual's citizenship status, **Citizen of U.S., or U.S. Territory**.

16. In the Disability section, make a selection to indicate whether the individual has a disability, **No**.

17. In the Education Information section, select the individual's highest education achievement level, **High School Diploma** and their current school status, **No, not attending any school**.

Education Information

* **Your Highest Education Level Achieved:** High School Diploma

* **Are you attending school?** No, Not Attending Any School

Education Information Section

18. In the Spouse or Caregiver of a Military Member section, provide a **No** response.

Spouse or Caregiver of a U.S. Military Member

Spouse or family caregiver of a Military member or Veteran may be entitled to State and Federal benefits. Please answer the following questions.

* Are you the Spouse or Caregiver of an active U.S. Military member or a Veteran?
  ○ Yes
  ○ No

Spouse or Caregiver of a Military Member Section

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

19. In the Military Service section, select **No**.

20. In the Job Title section, enter the individual's preferred job title, **Quality Inspector**. As you type, suggested matches will display, from which you may select a title such as **Quality Inspector - Inspectors, Testers, Sorters, Samplers, and Weighers**.

Job Title

Please enter a job title below. As you are entering the job title, you may see a list of common
entering. If you see your job title in the list, select it.

*Job Title

Quality Control Inspector

Quality Control Inspector
Quality Control Inspector (QC Inspector)

Job Title Section of Create Individual Account Process

21.   In the Job Occupation section, select **Inspectors,
Testers, Sorters, Samplers, and Weighers**.

Job Occupation

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

Suggested occupation(s):   Inspectors, Testers, Sorters, Samplers, and Weighers ▾

[Search for an occupation ☑

*Occupation Title: Inspec
*Occupation Code: 51906

None Selected
Aviation Inspectors
Inspectors, Testers, Sorters, Samplers, and Weighers
Food Scientists and Technologists
Transportation Inspectors

Job Occupation Section of Create Individual Account Process

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

22.   In the Ethnic Origin section, select whether the individual
is of Hispanic or Latino heritage, **(your choice)**.

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

Race

*Race - Please check all that apply:	☐ African American/Black
	☐ American Indian/Alaskan Native
	☐ Asian
	☐ Hawaiian/Other Pacific Islander
	☐ White
	☑ I do not wish to answer.

Race Section of Create Individual Account Process

24.   In the Language section, provide a response.

Language

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

○ Yes
◉ No

Save   Cancel

Language Section

25.   Select the **Save** button to complete the registration. Upon successfully saving the data entry, the system displays a Registration Confirmation page (see figure below).

What's Next?

Add information to better match job requirements
Employment and education history are sometimes required in the application process and are used as indicators when comparing jobs with applicants. By completing a few more prompts, you can see how well you qualify for the jobs you have found and employers will compare you favorably against other applicants.

Create a résumé
Some jobs in our system require the applicant to apply with a résumé. This option will help you create that résumé and add the employment history and education. Employers can also search for résumés on our system, so completing a resume will help employers find you.

Apply for Career Services and Training
Federal and state grants are available for qualified applicants to obtain career services and training or get priority assistance. Completing the full registration will help staff identify if you qualify for any of these grants.

Additional Veteran Services
Additional services may be available to you if you are a qualified veteran. We will require you to answer a few more detailed veteran questions.

Sample Registration Confirmation Page

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

# Exercise #8: Complete TAA Program Application

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

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and are currently managing the fictitious individual.

Purpose: This exercise is necessary for staff to practice managing the TAA workflow in WIT.com.

To complete the TAA program application:

1. Continue to assist the individual.

2. Click their **name hyperlink** next to Currently Managing displayed top center of the screen.

3. In the folder tree area at the top of the page, click **Staff Profiles >Case Management Profile >Programs**.

4. Scroll down to the Trade Adjustment Assistance (TAA) section and click the **Create Trade Adjustment Assistance (TAA) Application from Eligible Worker Layoff List** link.
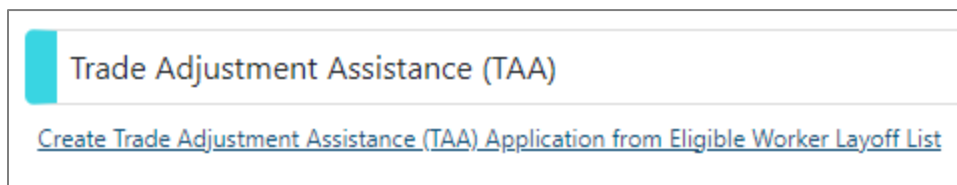
Create Trade Adjustment Assistance (TAA) Application from Eligible Worker Layoff List Link

5. As a result of selecting the link, the WIT system refreshes the screen display. Select the radio button displayed for the corresponding TAA petition (i.e., **98002**) and select **Create Application**.

Select TAA Petition Number and Create Application Prompts

6. 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

Intro Page

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 ▼

TRADE Application Wizard – Intro Page

To complete the Intro page:

1. Select/maintain the **Today** link for each of the following fields:

    i.   Application Date

    ii.   Eligibility Date

2. Confirm the LWDB, Office Location, and Office Location of Responsibility default selections are correct. Adjust the selections if needed.

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

Contact Page

Contact Information

*First Name:	Jack
Middle Initial:	
*Last Name (including suffix e.g. Jr., Sr., PhD, etc.):	Skellington
*Social Security Number:	900004683
	Edit SSN 🗗
*SSN Verify:	[**Verify** | **Scan** | **Upload** | **Link**] ✔ Social Security Card

Residential Address

*Address 1:	222 Novel Street

TRADE 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 verification documents displays.

   ii. Select **Social Security Card** and click **Verify** again to hide the list.

   iii. (Optional) Select the **Upload** link to practice uploading a sample document following the instructor's directions.

3. Confirm that all pre-populated information satisfies data entry requirements.

4. (Optional) Select the **Add New Contact** link to create record(s) for contact persons known to the applicant. Minimally, make up information for Contact Name, Phone Number, and Relationship fields. Click **Save** to secure your edits.

Note: Because this is an existing record, you might see existing contact information.

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

Demographic Page

Demographic Information

* Date of Birth: 11/29/1981   **Edit Date Of Birth**

* Verify: [Verify | Scan | Upload | Link]
        ✔ Driver's License

Today's Age: 41

TAA Eligibility Age: 41

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

* U.S. Citizenship Status: Citizen of U.S. or U.S. Territory ▾

* Verify: [Verify | Scan | Upload | Link]
        ✔ Birth Certificate

* Hispanic/Latino Heritage: ◯ Yes ⦿ No ◯ Did not self-identify

* Race (Ethnicity) check all that apply: ☐ African American/Black
     ☑ American Indian/Alaskan Native
     ☐ Asian
     ☐ Hawaiian/Other Pacific Islander
     ☐ White

TRADE Application Wizard – Demographic Page

To complete the Demographic page:

1. Verify the Date of Birth.

    i.   Click the **Verify** link to verify. A list of verification documents displays.

    ii.   Select **Driver's License** and click **Verify** again to hide the list.

    iii.   (Optional) Select the **Upload** hyperlink to practice uploading a sample document following the instructor's directions.

2. Confirm and modify prefilled fields, as appropriate.

3. Verify the citizenship status.

    i.   Click the **<u>Verify</u>** link to verify. A list of verification documents displays.

    ii.   Select **Birth Certificate** and click **<u>Verify</u>** again to hide the list.

    iii.   (Optional) Select the **<u>Upload</u>** link to practice uploading a sample document following the instructor's directions.

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

Veteran Page

Spouse or Caregiver of a Military Member

Are you the spouse of a member of the armed forces who is on active duty? ○ 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

TRADE Application Wizard – Veteran Page

To complete the Veteran page:

1. Maintain **No** responses and click the **Next** button to proceed.

Employment Page

TRADE Application Wizard – Employment Page

To complete the Employment page:

1. Select/maintain **Not Working** for Employment Status (from Registration).

2. Select/maintain **Unemployed** for Employment Status.

3. Select/maintain **No** for not in the labor force.

4. Select **Neither Claimant nor Exhaustee** for UC Eligibility Status.

5. Select **Yes** for Attended a Rapid Response Orientation.

6. Select the **Find RR Event** link.

7. Select the **Search** button.

8. Select the link for Event Number **99999999999**.

Individual Employment History Section:

1. Select the **Add Employment History** link.

2. Enter **General Electric** in the Employer Name field, selecting any match that displays.

3. Enter **Quality Inspector** as the Job Title and select the match that displays.

4. Select **Inspectors, Testers, Sorters, Samplers, and Weighers** from the Suggested Occupation(s) list box.

5. Enter **Regular** for Type of employment.

6. Enter **Full Time (30 hours or more)** in the Full or part-time field.

7. Enter **11/08/2017** in the Date you began work field.

8. Select **Layoff** for Reason for Separation.

9. Select **Today** for Last Day Worked.

Note: The system will calculate the job duration upon saving the employment record if not displayed immediately.

10. Select the **Insert Occupation Description** link to identify job duties; choose the **Summary Description** radio button and click **Submit**.

11.	Select **Save** to return to the Employment Page of the TAA program application.

12.	Select **OK** for each prompt displayed to update the client's background information.

TAA Petition and Employer Section

TAA Application Wizard – Employment Page: TAA Petition and Employer Section

1. Confirm that:

	i.	TAA Petition number **98002** is displayed as read-only.

	ii.	**Eligible Worker Layoff List** is the selected verification reason.

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

2. Enter **40.0** for Hours Per Week.

3. Enter **11/08/2017** for the Employment Begin Date.

4. Enter **$22.00** for Dislocation Hourly Wage.

5. Enter **$800.00** for Average Weekly Wage.

6. Confirm the following:

      i.   Verification reason displays **Eligible Worker Layoff List.**

      ii.   Type of separation displays **Total.**

      iii.   Reason for Separation displays **LP Permanent Layoff**.

      iv.   A valid Separation Reason has been entered displays **Yes**.

7. In the TAA Re-Employment section, select **No**.

8. Click the **Next** button to proceed.

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

TRADE Application Wizard – Education Information Page

To complete the Education page:

1. Select/maintain **12 school grades completed** for the Highest school grade completed by the individual.

2. Select/maintain **Yes** for High School diploma or equivalent.

3. Select **Attained secondary school diploma** for Highest education level completed.

Education Partner Services Section

1. Select **No** for each item.

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

Public Assistance Page

TRADE Application Wizard – Public Assistance Information Page

To complete the Public Assistance page:

1. Select **No** for each item.

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

Individual Barriers Page

Individual Barriers

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

* English Language Learner: ○ Yes ◉ No

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

Barriers To Employment

* Single Parent (including single pregnant women): ○ Yes ◉ No ○ Did not self-identify

TRADE Application Wizard – Individual Barriers and Barriers to Employment Page

To complete the Barriers page:

1. Select/maintain **No** responses for the Individual Barriers and Barriers to Employment sections.

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

Eligibility Summary Page

TRADE Application Wizard – Eligibility Summary Page

To complete the Eligibility Summary page:

1. Select/maintain **No** for each of the following:

    i. Have you received a benefit under a prior TAA certification in the last 10 fiscal years?

    ii. Referred to WIOA staff for possible co-enrollment.

    iii. Individual has declined WIOA co-enrollment.

2. (Optional) Confirm you are the assigned case manager. If not, select **Assign Me**; or, **Assign Case Manager**, select **Assign to this group**, and select the username for your staff login.

3. (Optional) In the Remote Signature section, select the **Capture Signature** link for the applicant.

     i.   Select the **Manual** option.

     ii.   Draw the applicant's signature with your mouse.

     iii.   Click **Apply**.

4. (Optional) In the Remote Signature section, capture the staff signature.

     i.   Select the **Click this link to use your saved signature image** hyperlink if you already created one using My Staff Account, OR

     ii.   Select the **Capture Signature** link for the staff user.

     iii.   Select the **Manual** option.

     iv.   Draw staff's signature with your mouse.

     v.   Click **Apply**.

5. Select the **Finish** button.

6. When prompted, select the **Return to Programs Tab** option.

Exercise #9: Complete TAA Participation Form

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

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

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

To complete the TRADE Participation form:

1. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) section, click the **plus sign ➕ icon** to expand it and scroll down to the Participation ribbon.

2. Click on it to expand it, then click the **Create Participation** link.

3. Enter the Participation Date by selecting the **Today** link.

4. Select **Next** to save the data entry and proceed to the Create Enrollment screen.

Exercise #10: Create TAA Enrollment Record 1

🏃

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

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and completed the TRADE Participation form.

Purpose: This exercise helps participants practice documenting the delivery of program services.

Note: Because this will be the first service entered, the system will automatically display the TRADE enrollment form, so staff can skip steps 1 and 2 and go to the General Information Tab section.

To complete a TRADE service enrollment record:

1. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) 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.
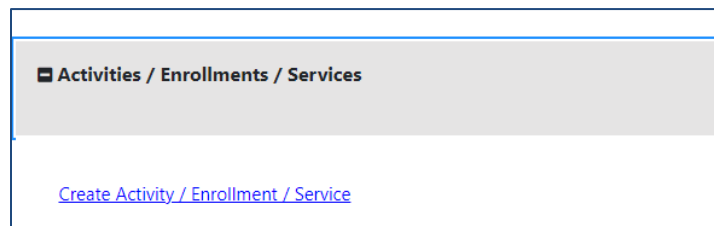
Create Activity / Enrollment / Service Link

General Information Tab

1. In the General Information area, maintain **TA1 – TAA** as the desired Customer Program Group.

2. Select/confirm the staff member LWDB region.

3. Select/confirm the staff member Office Location.

4. Click the **Select Activity Code** link and choose **102 – Initial Assessment** from the list displayed.

5. Maintain the Actual Begin Date, which is the TRADE Participation date.

6. Select the **Today** link to enter the Projected End Date.

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

Service Provider Tab

1. Select **Sample Office Services Provider** from the Provider list box.

2. Select **102 – Initial Assessment** from the Service, Course, or Contract list box.

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

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #11: Enter Basic Skills Assessment Results

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

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and created the TRADE program service for Initial Assessment.

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

To add Basic Skills Assessment test scores:

1. Click the **Basic Skills Assessment** link on the Assessments tab of staff's Case Management Profile.

2. Click **Add Assessment** to create a new assessment record.

3. Select/maintain the **Today** link to enter the Assessment Date.

4. Select/confirm your LWIA/Board. The LWIA/Board determines which tests are available to choose from.

5. Select the drop-down arrow for Reading Test Given and select **Test of Adult Basic Education (TABE)**.

6. Select **Raw Score** for Reading Score Type.

7. Enter **0740** for the Reading Test Result.

8. Enter **7E** for Reading Test Version.

9. Select the affiliated Office from the drop-down list.

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

Basic Skills Assessment

Individual Name:	Packard, Hewlett
* **Assessment Date:**	10/11/2023 📅 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:	0740 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 ▾

Basic Skills Assessment Page

Exercise #12: Create an Objective Assessment Summary (OAS) Form

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

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual you are managing is a TRADE program participant.

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

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

To create an Objective Assessment Summary (OAS):

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

General Information

User Name:	JackSkellington20
User ID:	26288
State ID:	8510
* Program:	TRADE ▼
* Application ID:	10011 ▼
* LWIA:	Capital Area WF Board ▼
* Office:	123 WF SOL Capital Area East ▼
* Assessment Create Date:	07/29/2023 📅
	Today
Attach Active Plan:	○ Yes ● No
IEP ID #	
Age at Assessment	41

Objective Assessment Summary Wizard – General Information Page

2. In the General Information section, select the **TRADE** program.

3. Maintain your LWIA and select your Office affiliation.

4. Select/maintain the **Today** link to enter the Assessment Create Date.

5. In the Staff section, enter/maintain today's date for the assessment completion date.

6. Click **Next** to save your edits and continue to the Program Expectations page (see figure below).

Program Expectations

Program Expectations

* Are you seeking immediate employment   ● Yes   ○ No

* What services are you seeking

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

Training assistance and Employment Assistance

[Clear Text]

Objective Assessment Wizard – Program Expectations Page

1. In the Program Expectations section:

    i. Indicate whether the individual seeks immediate employment, **Yes**.

    ii. Record desired services in the text box, for example, **Education Assistance and Employment Assistance**.

2. In the Employment Expectations section:

    i. Maintain as Occupation 1 the **Quality Inspector** title.

    Note: Because you are managing an existing account profile, an occupational title may already be displayed.

    ii. If Occupation 1 displays a different title, click the **Select Occupation** link for Occupation 2; search for and select **Computer Programmer**.

    iii.   Specify desired job attributes, such as employment type (**Regular**), full or part time (**Full Time (30 Hours or More**), desired salary **($24.00 hourly**), shift preferences (**1st**), benefits needed (**Health Insurance**), etc.

    iv.   Select **Yes** for Desires Help in Career Planning.

    v.   Select **Yes** for Seeking Training Services.

    vi.   In the Training Preferences box, enter **Computer programmer training**.

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

Education

Education History

Highest Grade Completed High School Diploma

Currently Enrolled in School No, Not Attending Any School

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

[Clear Text]

Objective Assessment Wizard – Education Page

1. In the Education History section:

   i.   Maintain/select **High School Diploma** for Highest Grade Completed.

   Note: Because you are managing an existing account profile, education data may already be displayed.

   ii. Select **No, Not Attending Any School** for Currently Enrolled in School.

2. Click **Next** to save your edits and continue to the Degree page.

Degree

Objective Assessment Wizard – Degree Page

1. Select **Add a New Degree**.

    i.   Select **High School Diploma** for Type of Education Qualification/Degree.

    ii. Enter **High School Diploma** for Actual Title of the Education Program.

    iii. Enter a completion date in mm/yyyy format.

    iv. Click **Save**.

Note: Because you are managing an existing account profile, a degree may already be displayed.

2. Click **Next** to continue to the Certificate page (see figure below).

Certificates
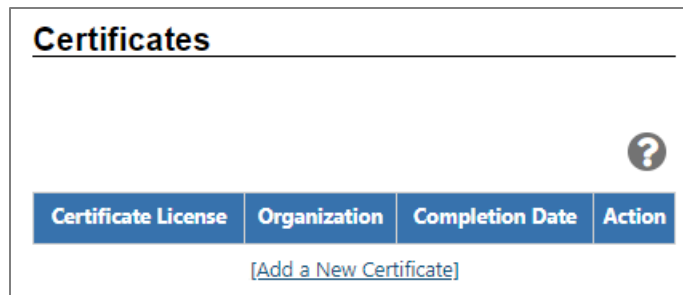
Objective Assessment Wizard – Certificate Page

1. Click **Next** to continue to the Employment page (see figure below).

Note: Because you are managing an existing account profile, a certificate may already be displayed.

Employment

Occupational Transferable Skills

Summary of Skill Assessment

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

> Written and verbal communication skills.
> Basic math skills.
> Basic computer skills.
> Attention to detail.
> Analytic skills.
> Documentation skills.

[Clear Text]

Employment History

Employer	Start/End Dates	State	Action
General Electric	02/2018 - 07/2023	TX	Edit | Delete

[Add a New Employment History]

Objective Assessment Wizard – Employment Page

1. In the Occupation Transferrable Skills section, in the Summary of Skill Assessment box, enter the following:

   - Written and verbal communication skills.

   - Basic math skills.

   - Basic computer skills.

   - Attention to detail.

   - Analytic skills.

   - Documentation skills.

2. In the Employment History section, maintain the employer record for General Electric.

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

Household & Income

Household & Income

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

Name	Relationship	Age	Income Source	Annualized Income	Action
			Annualized Total	$0.00	

[Add a New Household Member]

Household & Income Summary

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

Objective Assessment Wizard – Household & Income Page

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

Work Readiness

Objective Assessment Wizard – Work Readiness Page

1. In the Work Readiness section, select the following checkboxes:

    i.   **Dependent Care Needs**

        1) **Not at this time**

    ii.   **Transportation**

        1) **Has a valid license**

        2) **Lacks Automobile Insurance**

    iii. **Contacts**

        1) **Telephone in home**

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

    i. **Resume**

        1) **Does not Have Resume**

    ii. **Needs to Learn how to use Labor Market Information**

3. In the Workplace Behavior Assessment Summary box, enter **Client is eager to become re-employed.**

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

Barriers

Objective Assessment Wizard – Barriers Page

1. In the Health & Behavioral Observations section, select the following checkboxes:

     i. **Health**

          1) **Lacks Medical Insurance Coverage**

2. In the Health & Behavior Observations Assessment Summary box, enter the following:

   - **Client does not have personal medical insurance.**

   - **Client experiences difficulty making a positive, strong first impression.**

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

Criminal Background

Objective Assessment Wizard – Criminal Background Page

1. In the Arrests section, select the following check boxes:

    - **No arrest record** for Arrests.

    - **None** for Current status of arrest.

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

Tests

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 not basic skills deficient.

Objective Assessment Wizard – Tests Page and Assessments Tab

1. In the Testing Results Comments: box, enter **Client is not basic skills deficient.**

2. Click **Finish** to complete the OAS. The updated Plan tab redisplays.
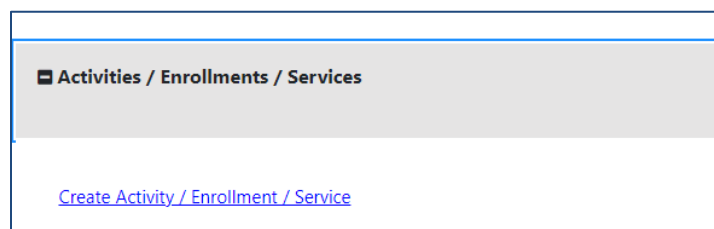
Exercise #13: Create TAA Enrollment Record 2

🏃

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

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and created at least one TRADE program service.

Purpose: This exercise helps participants practice documenting the delivery of program services.

To complete a TRADE service enrollment record:

1. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) 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.

```
⊟ Activities / Enrollments / Services


   Create Activity / Enrollment / Service
```

Create Activity / Enrollment / Service Link

General Information Tab

1. In the General Information area, maintain **TA1 – TAA** as the desired Customer Program Group.

2. Select/confirm the staff member LWDB region.

3. Select/confirm the staff member Office Location.

4. Click the **Select Activity Code** link and choose **203 – Comprehensive Objective Assessment**.

5. Select the **Today** link to enter the Actual Begin Date.

6. Select the **Today** link to enter the Projected End Date.

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

Service Provider Tab

1. Select/maintain **Sample Office Services Provider** from the Provider list box.

2. Select **203 – Comprehensive Objective Assessment** from the Service, Course, or Contract list box.

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

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #14: Create an Individual Employment Plan (IEP)

Objective: Perform data entry to build the blueprint for planned service delivery.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual you are managing is a TRADE program participant.

Purpose: This exercise helps participants practice documenting the goals and objectives the customer must fulfill to achieve the plan's intended outcome.

To create an IEP for the assisted individual:

1. On the **Plan tab** of the **Case Management Profile**, click the **Create Individual Employment Plan / Service Strategy** button. The system displays the Plan tab screen.

2. In the Plan Information section:

    i.   Select the **Today** link to enter the Plan Start Date.

    ii. Select/maintain your LWDB/Region.

    iii. Select/maintain the office location for the plan start.

3. Click **Next** to save your data entry and proceed to the Goals tab screen.

Plan Information

* **Plan Start Date** 06/23/2023 (mm/dd/yyyy) 📅 Today

* **LWDB/Region** Capital Area WF Board ▼

* **Plan started in office location** 123 WF SOL Capital Area East ▼

Plan closed on (mm/dd/yyyy) 📅 Today

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).

Goal Information

*LWDB/Region	Capital Area WF Board ▼
*Office	123 WF SOL Capital Area East ▼
*Program Affiliation	☑ Trade Adjustment Assistance (TAA)
*Type of Goal	Training ▼
*Term of Goal	Long Term ▼
*Description of Goal	Occupational skills training
*Date Established	07/29/2023 (mm/dd/yyyy) 📅 Today

Create IEP – Add New Goal Page

2. In the Goal Information section:

 i. Select/maintain the LWDB/Region and Office.

 ii. Select the **Trade Adjustment Assistance (TAA)** program affiliation.

 iii. Select **Training** for Type of Goal.

 iv. Select **Long Term** for the Term of Goal.

 v. Enter **Occupational Skills Training** for Description of Goal.

 vi. Select the **Today** link to enter the Date Established.

vii. Enter a date one year from today as the Estimated Completion Date.

viii. Enter **The client will complete computer programmer training** in the Goal Details text box.

ix. Click **Save**.

3. Click **Next** to proceed to the Objectives tab screen.

To add a new objective to the IEP:

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 you just created.

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

4. Select the **Trade Adjustment Assistance (TAA)** program affiliation.

5. Enter **Research training providers** for the Objective.

6. Select the **Today** link to enter the Date Established.

7. Inside the Review Date field, enter a date **45 days after the Established Date** value, OR, click the calendar icon to manually select the month, date, and year.

8. Enter **The client will use the WIT system to research training providers and the courses they offer.** in the Objective Details text box.

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

To add a pre-defined objective to the IEP:

1. On the Objectives tab, click the **Select pre-defined objectives** link.

2. Select the Goal for the objective(s).

3. Select/maintain the LWDB/Region and Office Location.

4. Select the **Trade Adjustment Assistance (TAA)** program affiliation. 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 **Employment** - **Resume Writing** checkbox in the left column.

6. Select the **<u>Today</u>** link for that objective to enter the Date Established.

7. Click inside the Review Date field to set the default **45 days after Established Date** value.

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

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

IEP/ISS Services

App # - program	Service/Activity	Begin Date	End Date	Provider	Staff
19616 - TAA	102 - Initial Assessment	A - 03/22/2024	P - 03/22/2024	Sample Office Service Provider	30427
19616 - TAA	203 - Comprehensive Objective Assessment	A - 03/22/2024	P - 03/22/2024	Sample Office Service Provider	30427

Create IEP – Services Tab

10. 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
1260	Capital Area WF Board	123 WF SOL Capital Area East	OPEN	1	Marks, John	06/23/2023	Edit Delete Display/Print

Completed IEP

Exercise #15: Create TRADE Enrollment Record 3

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

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and created a TAA training waiver for approval.

Purpose: This exercise helps participants practice documenting the delivery of program services.

To complete a TRADE service enrollment record:

1. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) 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.

Create Activity / Enrollment / Service Link

General Information Tab

1. In the General Information area, maintain **TA1 – TAA** as the desired Customer Program Group.

2. Select/confirm the staff member LWDB region.

3. Select/confirm the staff member Office Location.

4. Click the **Select Activity Code** link and choose **205 – Individual Employment Plan (IEP/EDP)**.

5. Select the **Today** link to enter the Actual Begin Date.

6. Select the **Today** link to enter the Projected End Date.

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

Service Provider Tab

1. Select **Sample Office Services Provider** from the Provider list box.

2. Select **205 – Individual Employment Plan (IEP/EDP)** from the Service, Course, or Contract list box.

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

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #16: Create TRADE Waiver for Approval

Objective: Perform data entry to create and submit a Trade training waiver.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and training for the individual is not available at this time.

Purpose: This exercise helps participants practice creating a waiver request for State approval.

To create a Training Waiver:

1. Continue to assist your TAA individual; navigate to their **Programs** tab of staff's **Case Management Profile**.

2. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) section, click the **plus sign ➕ icon** to expand it and scroll down to the Waiver Entry ribbon.

3. Click on it to expand it, then click the **Create Waiver Entry** link.

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.			

Add TAA Waiver Entry Screen

4. Maintain today's date in the Waiver Issued Date field.

5. Select **Training Not Available** for the Waiver Reason.

6. (Optional) Click the **Select Occupation** link; select **Computer Programmer** for the occupation code.

7. (Optional) Enter a case note.

Note: To replicate State approval, select **Approved** for the waiver determination and select **Today** for the determination date.

8. (Optional) Include supporting information by selecting the **Add Document**, **Scan Document**, or **Complete Online Form** buttons.

9. Click **Save**.

10.   Click **OK** to close the prompt.

Note: If staff would like to apply client and staff signatures, they may do so after saving the waiver.

Exercise #17: Create TRADE Enrollment Record 4

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

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and created a TAA training waiver for approval.

Purpose: This exercise helps participants practice documenting the delivery of program services.

To complete a TRADE service enrollment record:

1. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) 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.

Create Activity / Enrollment / Service Link

General Information Tab

1. In the General Information area, maintain **TA1 – TAA** as the desired Customer Program Group.

2. Select/confirm the staff member LWDB region.

3. Select/confirm the staff member Office Location.

4. Click the **Select Activity Code** link and choose **236 – TAA Waiver – Training Not Available**.

5. Select the **Today** link to enter the Actual Begin Date.

6. For the Projected End Date, enter a date 30 days from the actual begin date.

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

Service Provider Tab

1. Select **Sample Office Services Provider** from the Provider list box.

2. Select **236 – TAA Waiver – Training Not Available** from the Service, Course, or Contract list box.

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

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #18: Manage Waiver Review

Objective: Perform data entry to maintain the training waiver for up to 26 weeks until training is available for the customer.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and have already completed a training waiver that is State approved.

Purpose: This exercise helps participants practice reviewing and documenting the customer's status every 28 days.

To manage the waiver review:

1. Continue to assist your TAA individual; navigate to their **Programs** tab of staff's **Case Management Profile**.

2. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) section, click the **plus sign** ✚ **icon** to expand it and scroll down to the Waiver Entry ribbon.

3. Click on it to expand it, then click the **Edit Waiver Entry** link.

4. Locate the waiver review schedule (displayed in table format) and select the first **Edit** link with a Pending status.

Waiver Review Entry

Review Date: 07/29/2023 [📅] Today

Met Review Requirements: ⦿ Yes ◯ No

Has Waiver Reason Changed: ◯ Yes ⦿ No

New Waiver Reason: None Selected ▼

Waiver is Still in Effect: ⦿ Yes ◯ No

Reason no Longer in Effect: None Selected ▼

Reason for Revoke: None Selected ▼

Reason Other:

Date Waiver Revoke: [📅] Today

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

ID	Create Date	Subject	Action
No data found.			

Waiver Review Entry Screen

5. Enter the Review Date by selecting the **Today** link.

6. For Met Review Requirements, select **Yes**.

7. For Has Waiver Reason Changed, select **No**.

8. For Waiver is Still in Effect, select **Yes**.

9. (Optional) Add a new case note.

10.   Click **Save**.

Exercise #19: Revoke a TRADE Waiver

Objective: To revoke or remove the training waiver to allow for the customer's desired training service.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and have already maintained at least one waiver review.

Purpose: This exercise helps participants practice how to end a training waiver to prepare for the customer's training service.

To revoke a Training Waiver:

1. Find and assist the desired individual, then navigate to their Programs tab.

2. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) section, click the **plus sign ➕ icon** to expand it and scroll down to the Waiver Entry ribbon.

3. Click on it to expand it, then click the **Edit Waiver Entry** link.

4. Locate the waiver review schedule (displayed in table format) and select the next available **Edit** link with a Pending status.

Waiver Review Entry Screen

5. Enter the Review Date by selecting the **<u>Today</u>** link.

6. For Met Review Requirements, select **Yes**.

7. For Has Waiver Reason Changed, select **No**.

8. For Waiver is Still in Effect, select **No**.

9. For Reason no Longer in Effect, select **Revoked**.

10. For reason for Revoke, select **Waiver Revoked – Entered Training**.

11. Select the **<u>Today</u>** link for the waiver revoke date.

12. (Optional) Add a new case note.

13. Click **Save**.

Exercise #20: Create the TRADE Training Application Form

Objective: Determine the suitability of a training program for the customer.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual you are managing would benefit from training.

Purpose: This exercise helps participants practice documenting the information required to identify training provider/service details.

To create a Trade Training Application Form:

1. Find and assist the desired individual, then navigate to their Programs tab.

2. Click the **plus sign** ✚ **icon** to expand their Training Applications panel.

3. Click the **plus sign** ✚ **icon** to expand the Training Applications ribbon and click the **Create Training Application** link.

General Information

User ID:	18138
State ID:	4330
Eligibility Date:	3/21/2024
Trade Petition Number:	98002
Training based upon qualifying separation date:	7/6/2024
Training based upon certification date:	12/31/2022
First Name:	Buck
Middle Name:	
LastName:	Deer

Training Request

TRA Training Enrollment Date:	▢ Today
*Training Application Date:	03/22/2024 ▢ Today

*Occupational Goal:
15125100 - Computer Programmers

Search Onet

TAA Training Application Screen

4. In the Training Request section:

    i. Select/maintain today's date for the Training Application Date.

    ii. Select the **Search Onet** link to search for and select the Occupation Goal (**Computer Programmers**).

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

    i. Provider = **Sample Training Service Provider**

    ii. Program = **328 – Occupational/Vocational Training (Non-ITA)**

     iii.   Enter today's date for the estimated begin date.

     iv.   Enter a date one year from today for the estimated completion date.

     v.   Click **Save**.

Note: Upon saving the record, the system will calculate the training duration.

6. In the Training Criteria section, select **Yes** to answer each of the listed questions.

7. In the Training Decision section:

     i.   Select **Approved**.

     ii.   Select **Today** for the decision date.

Note: When staff submit this training application, the decision for training will maintain a Pending status. When the State reviews and approves the request, it will set Approved as the status and enter the decision date. If the State denies the training application, it will select Denied, enter the decision date, and enter a denial reason.

     iii.   (Optional) enter a case note.

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

9. Click **Save**.

Exercise #21: Create TRADE Enrollment Record 5

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

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and created at least one TRADE program service.

Purpose: This exercise helps participants practice documenting the delivery of program services.

Note: Before staff may enroll a client in an approved TAA training service, they must revoke the training waiver (if one's in place) and enter an actual end date to officially close the related TAA waiver service. For help, see the topic: "To close program services" for Exercise 26.

To complete a TRADE service enrollment record:

1. From the Individual's Programs tab, in the Trade Adjustment Assistance (TAA) 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.
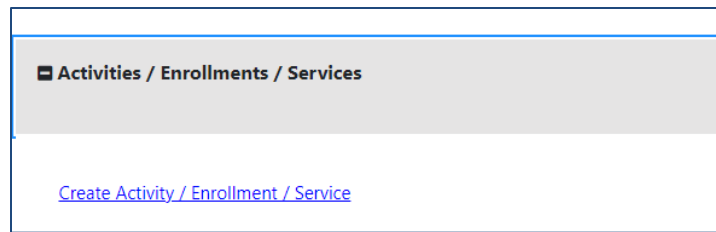
Create Activity / Enrollment / Service Link

General Information Tab

1. In the General Information area, maintain **TA1 – TAA** as the desired Customer Program Group.

2. Select/confirm the staff member LWDB region.

3. Select/confirm the staff member Office Location.

4. Click the **Select Activity Code** link and choose **328 – Occupational/Vocational Training (Non-ITA)**.

Note: Below the Actual Begin Date field, the system will display in blue text two reminders, as appropriate: (1) to close the TAA Waiver service if that service remains in Open status; (2) to revoke the training waiver if it remains in effect.

5. Select the **Today** link to enter the Actual Begin Date.

6. Enter a date 30 days from today for the Projected End Date.

7. Click **Today** to enter the Date Verified current training attendance.

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

Service Provider Tab

1. Select/maintain **Sample Training Services Provider** from the Provider list box.

2. Select/maintain **328 – Occupational/Vocational Training (non-ITA)** from the Service, Course, or Contract list box.

3. Select the **Occupational Training Code** link.

4. Select **Computer Programmers**.

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

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #22: Create TRADE Benchmark

Objective: Record a training status update on behalf of the customer.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual you are managing has a completed training application.

Purpose: This exercise helps participants practice documenting the customer's training progress (or lack thereof).

To create a Trade benchmark:

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 Training Benchmarks ribbon and click **View Training Benchmarks**.

4. Click the **Add Training Benchmark** link.

Training Benchmark Information

* Beginning Date of Benchmark Period: 04/12/2023 🔲 Today

* Ending Date of Benchmark Period: 06/12/2023 🔲 Today

* Is maintaining satisfactory academic standing (e.g. not on probation or determined to be "at risk" by the instructor or institution)?
◉ Yes
○ No

* Is scheduled to complete training within the timeframes identified in the approved training plan?
◉ Yes
○ No

Supporting evidence for the above [**Verify** | **Scan** | **Upload** | **Link**]
✔ Grades

* Review Date: 06/09/2023 🔲 Today

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

ID	Create Date	Subject	Action
No data found.			

Add Training Benchmark Screen, Training Benchmark Information Section

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

   i. Benchmark period begin date = **Today**.

   ii. Benchmark period end date = **60 days from today**.

Note: If your workforce board conducts reviews every 30 days, enter a date 30 days from today.

   iii. Satisfactory academic standing? (**Yes**).

   iv. Scheduled to complete training on time? (**Yes**).

      v.   Verify supporting evidence.

         1) Click the **<u>Verify</u>** link and enter/select **Grades**.

         2) (Optional) Select **<u>Scan</u>**, **<u>Upload</u>**, or **<u>Link</u>** to identify verification documentation provided by the individual.

      vi.   Review Date = **Today**.

      vii.   (Optional) Add a new case note.

6. Click **Save**.

Exercise #23: Entering Measurable Skills Gain (MSG)

Objective: Perform data entry to document the customer's skill achievement status.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual received services that impart skills (i.e., training).

Purpose: This exercise helps participants practice documenting the information required to complete the MSG record.

To record a Measurable Skills Gain for the 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.

General Information

~~SSIQABMT~~

Skill Attainment Information

Program: Trade Adjustment Assistance (TAA)

*Skill Type:

Skills Progression ▼

*Date Attained: 06/27/2023 📷 Today

*Type of Achievement: Satisfactory progress in attaining technical or occupational ▼

* [**Verify** | **Scan** | **Upload** | **Link**]
✔ Other Applicable Documentation (specify)

Staff Information

Staff User Create: Marks, John (29303)

~~te Date:~~ ~~6/27/2023 6~~

Skill Achievement Entry Page

4. Select/confirm the Office Location.

5. In the Skill Attainment Information section, select the Skill Type attained **(Skills Progression)**.

6. Select the **Today** link to enter the Skill Attainment date.

7. Select **Achieved satisfactory progress attaining Technical/Occupational Skills evidenced by Trade-related Benchmarks like knowledge-based exams** for the Type of Achievement.

8. To verify this information:

   i. Click the **Verify** link and select **Report Card**.

ii.   (Optional) Select **<u>Scan</u>**, **<u>Upload</u>**, or **<u>Link</u>** to associate supporting information with the case file.

iii.   Click the **<u>Verify</u>** link again to close the list.

9. (Optional) Collect the customer's signature and staff's signature.

10.   (Optional) Add a case note.

11.   (Optional) Add applicant signature and staff signature electronically.

12.   Click **Save**.

Exercise #24: Documenting Educational Functioning Level (EFL) for Measurable Skills Gain (MSG)

Objective: Perform data entry to document the customer's EFL status.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual received services that impart skills (i.e., training).

Purpose: This exercise helps participants practice documenting pre- and post-test data to demonstrate an increase in the customer's EFL.

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 TRADE 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.

The Educational Functioning Level entry page displays for pre-test data entry (see figure below).

General Information

Participant - Last 4 SSN: Jack Skellington (***-**-4683)

Case ID: 10011

*****Customer Group:**   TAA

*****LWIA/Region:**   Capital Area WF Board

One Stop Location: 123 WF SOL Capital Area East

Basic Skills Deficient at Eligiblity: No

School Status at Program Entry:

Pre-Test

*****Date of Pre-Test:**   07/30/2023   Today

*****Assessment Category:**   ABE

*****Type of Assessment:**   TABE 11-12

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:

    i.   Select **Today** to enter the Date of Pre-Test.

    ii.   Select the Assessment Category (**ABE**).

    iii.   Select the Type of Assessment (**TABE 11-12**).

    iv.   Select the Functional Area of the assessment (**Reading**).

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

     vi.   Enter the Pre-Test Score (**740**). 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).

6. Click **Save** to complete the EFL record.

Note: To complete a post assessment, staff perform nearly the same data entry as the pre-test assessment. On the summary table displayed, staff select the active link (i.e., **Reading / TABE 11-12**, scroll to the page bottom, and select the **Create Post Assessment Record** link to enter post-assessment details.

Exercise #25: Manage TAA/TRA Program Benefit Payments

🏃

Objective: Staff will use this component to enter mileage reimbursement, subsistence payments, and training costs for TAA program participants.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual is eligible to receive travel reimbursements, subsistence payments, and/or training support.

Purpose: Local boards will be required to enter applicable cost allowances at the time of accrual.

To enter TAA/TRA payments:

1. Find and assist the desired individual, then navigate to their Programs tab.

2. Click the **plus sign** ➕ **icon** to expand their TAA/TRA Program Benefit Payments ribbon.

3. Click TAA/TRA Program Benefits Payments ribbon to open and expand its contents.

4. Click the **View TAA/TRA Program Benefit Payments** link.

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

Benefit Information

*Any information entered on this screen must be based on an accrual

* **Benefit Date:** 08/30/2023 🖼 Today

* **Benefit Type:** Subsistence while in Training Payment ▼

* **Benefit Amount:** $ 200.00

* **Weeks Paid:** 2

A/RTAA Frequency: Bi-Weekly ▼

* **Benefit Cancelled:** ○ Yes ◉ No

Check/Tracking Number:

Enter TAA/TRA Benefit Information Screen

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

6. Select **Today** to enter the benefit date.

7. Select **Subsistence while in Training Payment**.

8. Enter **$200.00** for the benefit amount.

9. Enter **2** as the number of weeks paid.

10. Maintain the **No** response for benefit cancellation.

11. (Optional) Enter the check number or tracking number.

12. Click **Save**.

Exercise #26: Preparing for TRADE Case Closure

Objective: Close open activity services, IEP goals, and IEP objectives in preparation of the Case Closure event.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual is preparing to exit the TRADE program.

Purpose: This exercise helps participants practice managing the timely maintenance for program services and IEP details.

To close program services:

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 Activities / Enrollments / Services panel.

4. Click the **Close** link displayed under the Actual End Date column heading.

5. Select the **Today** link to enter the last activity (end) date for the service.

Note: Some program services may not extend beyond a single day. In such cases, enter an end date that matches the start date.

6. Select **Successful Completion** for the Completion Code.

7. Click **Finish**.

8. Repeat this process for each open service.

To close Objectives and/or Goals for the IEP:

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. Find and assist the desired individual, then navigate to their Plan tab screen of staff's Case Management Profile.

2. Open the plan by selecting the **Edit** link in the Action column.

3. To close open objectives:

    i.   Click the **Objectives** tab.

    ii.   Click the desired **Edit** link(s).

    iii. In the Objective Information section:

        1) Select the **Today** link for the Actual Completion Date.

        2) Select **Closed** as the Completion Status.

        3) Select **Successful Completion** as the Reason Closed.

        4) Add a comment, if desired, then click **Save**. Repeat as needed.

4. To close open goals, access the **Goals** tab and perform the steps above (as if closing open objectives).

Exercise #27: Creating a TRADE Case Closure

Objective: Close the case to end the delivery of planned services.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual is preparing to exit the TRADE program.

Purpose: This exercise helps participants practice managing the data entry required to prepare the customer's account profile for the eventual soft exit routine.

To create a Case Closure:

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 Closure panel.

4. Click the **Create Closure** link.

General Information

User ID:	26288
Last 4 of SSN:	***-**-4683
Name:	Jack Skellington
Date of Last Service:	7/30/2023
Exit Date:	
Exit Reason:	
Local Workforce Investment Area:	Capital Area WF Board
*Office Location:	123 WF SOL Capital Area East ▼
Closure Date:	7/30/2023
*Accountability Closure/Exit Status:	Neither condition applies ▼

TRADE Closure Screen General Info Section

5. On the General Info tab:

    i.   Select/maintain your office location.

    Note: The system provides the case closure date, which is the latest actual end date for the customer's program services delivered.

    ii.   Select the customer's accountability closure / exit status value of **Neither condition applies**.

    iii. Select **Completed TAA approved training w/ certificate** for the case closure reason.

6. Click **Next**.

7. On the Employment Information tab, select **No, did not enter employment,** and select **Next**.

8. (Optional) On the Staff Information tab, select **Add a new Case Note** to document supporting information.

9. Select **Finish**.

Exercise #28: Managing Program Exit/Outcome

Objective: Explore the data entry required if a TRADE participant satisfies a global exclusion.

Assumption: You are in the WIT training environment at **WIT Case Management Training Site** and the individual's program services are closed.

Purpose: This exercise helps participants prepare for cases where the soft exit process will not be utilized because the customer satisfies a global exclusion requirement.

To Create an Exit/Outcome record:

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 Exit/Outcome panel.

4. Click the **Create Exit/Outcome** link.

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

TRADE Exit / Outcome Form

5. In the Outcome General Information section, select/maintain your LWDB/Region, Office Location, and Staff Position.

6. In the Outcome Exit Information section:

    i.   Select/maintain **today's date** to set the exit date.

    ii. Select **Health/Medical** for the exit reason.

7. (Optional) Select Add a new Case Note to provide supporting information.

8. Select **Cancel**.

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, WIOA, SNAP E&T, and/or Choices.