

WorkinTexas.com Workforce Innovation and Opportunity Act (WIOA) 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

Training and Development Department

101 East 15th Street, Room 274

Austin, Texas 78778-0001

800-628-5115

Equal Opportunity Employer/Program

Auxiliary aids and services are available upon request to individuals with disabilities.

TWC accepts calls made through any relay service provider.

Copies of this publication (10/2019) have been distributed in compliance with the State Depository Law and are available for public use through the Texas State Publication Depository Program at the Texas State Library and other state depository libraries.

231205

<http://www.twc.texas.gov>

Contents

WIOA Program: Case Management Training	1
Course Objectives	1
About This Training	1
Glossary of Terms	2
About the WIOA Program	6
Getting Started: Staff Login	6
Message Prompt	7
My Staff Dashboard	8
Left Navigation Menu	9
Individual System Registration	21
Staff Assisting Individuals	35
Searching for an Individual and Assisting	35
Currently Managing	39
Individual Portfolio Folders	40
WIOA Program Application	51
Navigating the Application Wizard	53
Completing the WIOA Application Wizard	55
Viewing the WIOA Application	72
WIOA Eligibility Summary Ribbon	73
WIOA Participation Form	74
WIOA Activities, Enrollments, Services Ribbon	76
General Information Tab	77

Service Provider Tab	80
Enrollment Cost Tab	82
Financial Aid Tab.....	82
Enrollment Budget Tab	82
Budget Planning Tab	82
Closure Information Tab	82
Managing the WIOA Service Table	84
Assessment Results in Assessments Tab	86
Basic Skills Assessment	87
Aptitude Assessment	89
Other Assessments	91
Objective Assessment Summary (OAS).....	93
Individual Employment Plan (IEP)	106
Working with Existing IEP Plans	114
WIOA Training Justification Form.....	120
Viewing/Editing a Training Justification Form	123
WIOA Grant Outcome Ribbon.....	125
WIOA Measurable Skills Gain	128
Educational Functioning Level (EFL) for Measurable Skills Gain (MSG) Ribbon	132
Creating an EFL Pre-Test Record	132
Adding an EFL Post-Test Record.....	135
WIOA Program Closure	139
Deleting a Case Closure	143
WIOA Follow Up Services	144

WIOA Program Exit/Outcome Ribbon	146
Deleting WIOA Outcomes	149
WIOA Quarterly Follow-ups Ribbon	150
Credential (Ribbon)	161
Add/Entered Employment (Ribbon).....	165
Add Employment	165

This page intentionally left blank.

WIOA 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 through the WorkinTexas.com (WIT) website to manage WIOA 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 WIOA Program participants.
- Provide program services to program participants.
- Perform data entry to document the programmatic needs and achievements 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 WIOA individual. Although your staff **training** account privileges will be set high, your staff actual privileges when operating in the production site 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 WIOA 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.
- **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, 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.
- **Grant Enrollment** – The process by which staff manually set WIOA program eligibility for specific grant codes. This occurs in addition to formula eligibility determination.
- **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 WIOA Program

The Workforce Innovation and Opportunity Act (WIOA) is designed to help job seekers access employment, education, training, and support services to succeed in gainful employment and to match employers with the skilled workers they need to compete in a global economy. It is designed to strengthen and improve our nation's public workforce system and help get Americans, including youth and those with significant barriers to employment, into high-quality jobs and careers and help employers hire quality workers.

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

Getting Started: Staff Login

To manage service delivery to individuals through the WIOA 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

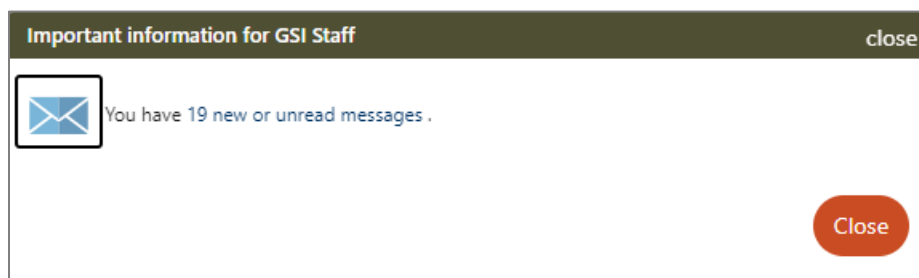
Workforce applications. The staff training login is generic and applies to the training environment only.

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 your assigned Username.
4. Enter the password provided by the trainer-
Trainingpassword@1.
5. Select **I’m not a robot** checkbox for reCAPTCHA, if applicable.
6. Review Staff Sign-in Notice text.
7. Click **Sign In**.

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.



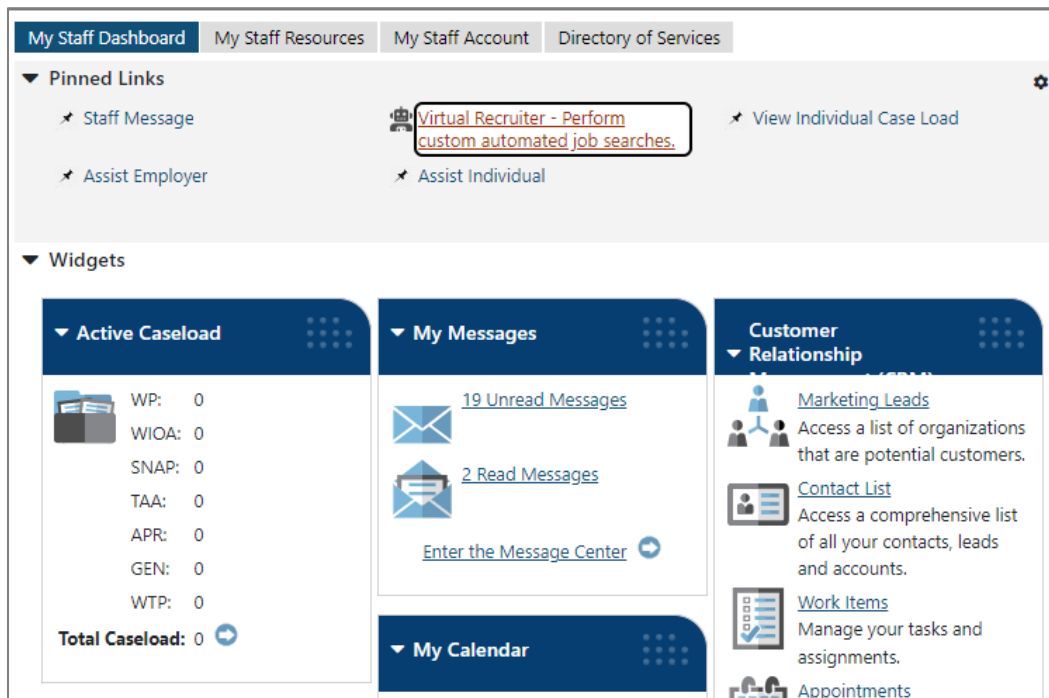
New or Unread Message Prompt

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.



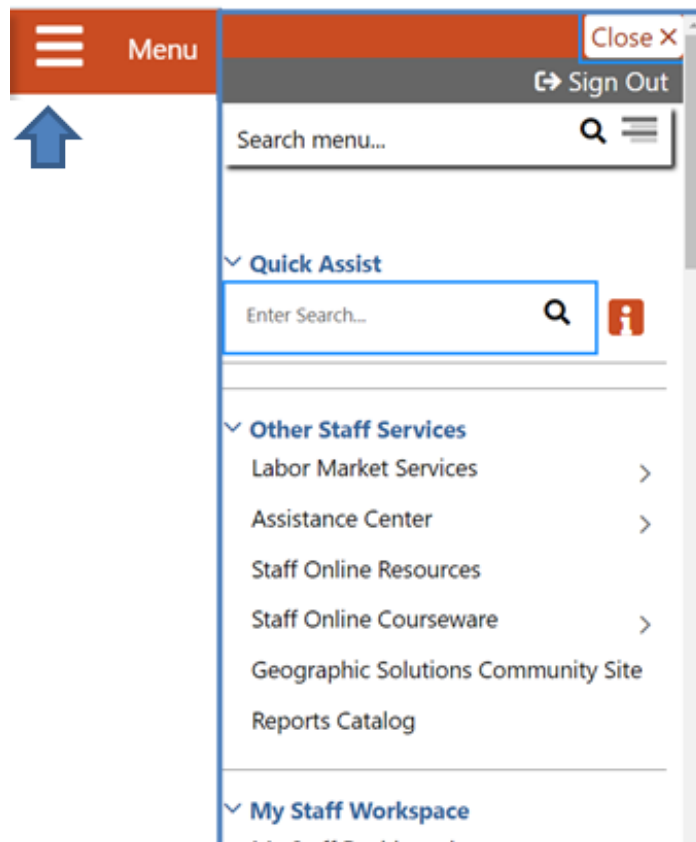
My Staff Dashboard, Excerpt

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 **My Staff Account** and scroll down to the **Preferences section**. Find **Menu Preferences** and then select your menu preferences.



Left Side-Bar Menu

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

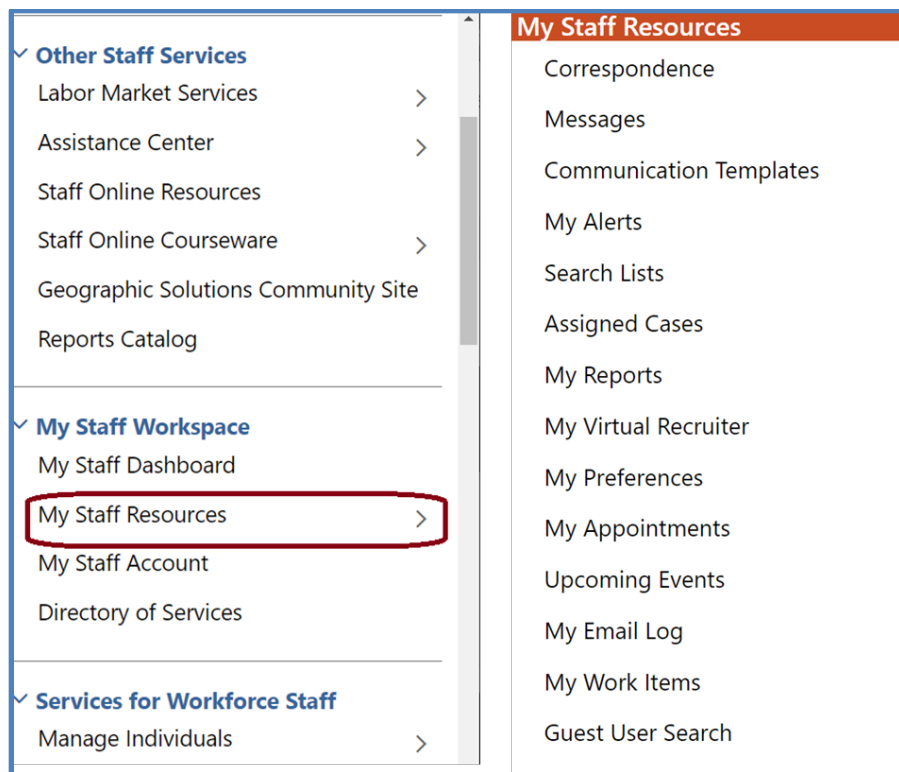
My Staff Workspace

- **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 the WIT Administration system.
 - **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, 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 for Individuals and Employers.
- **Manage Funds** –Individual Fund Tracking (IFT) 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.

Communication 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

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 WIOA program applicant can receive program services in the WIT system, they must have an account profile. To meet this requirement, staff training participants will manually create a sample individual account by performing the steps that follow.

Notes: Fields marked with a red asterisk (*) are required. Please note that screen appearances are subject to change, but the data entry requirements will remain the same.

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 username and password for system login purposes.

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

Login Information ?

* User Name:

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

* Password: 👁

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

* Confirm Password: 👁

* Security Question: ▼

* Security Question Response: 👁

Special characters are not allowed.

Login Information Section of Create Individual Account Process

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

Name	
* First Name:	<input type="text" value="Jacob"/>
Middle Initial:	<input type="text"/>
* Last Name:	<input type="text" value="Schneider"/>

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 does not have or provide their Social Security Number (SSN), select the checkbox.


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


Social Security Number Section

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.

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

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

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

[Close Window](#)

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

* Country:

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

Primary Location Information Section

9. In the Residential Address section, select whether the individual is homeless 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.

Look Up a ZIP Code™

[FAQs >](#)

By Address	By City and State	Cities by ZIP Code™
Enter a corporate or residential street address, city, and state to see a specific ZIP Code™.	Enter city and state to see all the ZIP Codes™ for that city.	Enter a ZIP Code™ to see the cities it covers.
<input type="button" value="Find by Address"/>	<input type="button" value="Find by City & State"/>	<input type="button" value="Find Cities by ZIP"/>

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

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

Age: 34

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

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

Demographic Information Section

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

11. In the Citizenship section, indicate the individual's citizenship status.
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

* **Your Highest Education Level Achieved:**

* **Are you attending school?**

Education Information Section of Create Individual Account Process

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

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 U.S. Military Member Section

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
 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 Members

Please indicate your transitioning type and transitioning service member discharge date.

* Transitioning Service Member Type:

* Projected Discharge Date: 
(mm/dd/yyyy)

* Have you received a signed DD-2648 (Service Member Pre-Separation / Transition Counseling and Career Readiness Standards Form) indicating you do not meet career readiness standards?

Yes
 No

* Are you being involuntarily separated from active duty due to a reduction- in-force?

Yes
 No

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

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

Job Title

- Delivery Driver**
- Delivery Driver/Customer Service
- Delivery Driver/Supervisor

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

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

Suggested occupation(s):

- None Selected
- Driver/Sales Workers**
- Light Truck Drivers
- Heavy and Tractor-Trailer Truck Drivers
- Motor Vehicle Operators, All Other

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

*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

22. 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





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).

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.


Staff Assisting Individuals

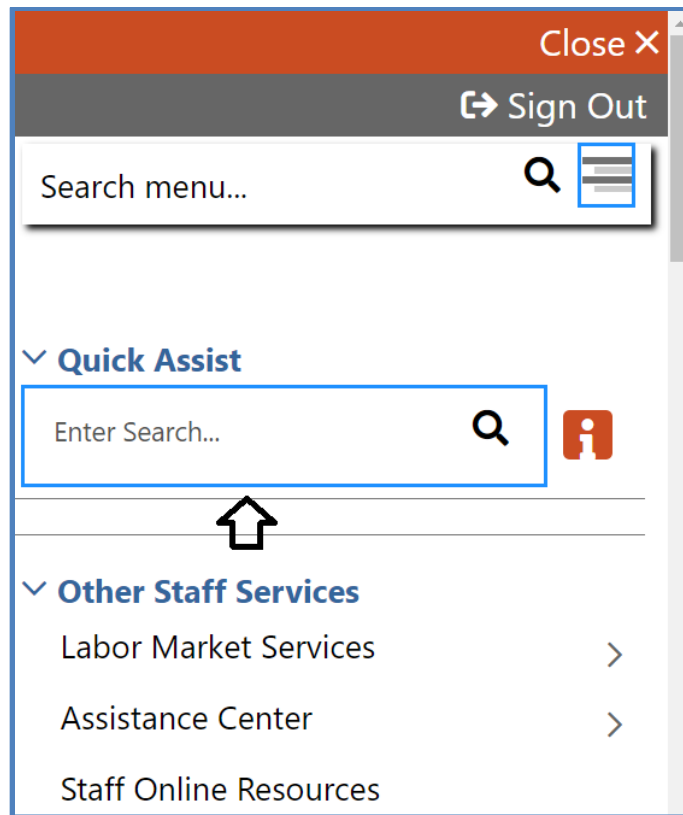
Searching for an Individual and Assisting

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

Once an individual has completed system registration, staff can perform a search for their account and provide assistance 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.



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.

Quick Assist

You have 1 saved Individual item(s) in [My Search Lists](#).

Here are the 5 most recent individuals you assisted: [Assist](#)

[[Top](#) | [Search](#) | [Bottom](#)]

General Criteria

Individual Username:

Individual User ID:

Starts with these #s
 Matches exactly

State ID Number:

First Name:

Last Name:

SSN (last 4 digits):

SSN (full number): Example: 999999999

Date of Birth: (MM/DD/YYYY)

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 search for and assist a veteran spouse, click the **Veteran** jump link.

[[Quick Assist](#) | [General](#) | [Office](#) | [Location](#) | [Additional Characteristics](#) | [Employment](#) | [Veteran](#) | [Public Assistance](#) | [Activity/Service](#) | [Activity/Service Projected End](#) | [Special Program](#) | [Skills](#) | [Employer Indicator](#) | [Typing](#) | [Language](#) | [Drivers License](#) | [Staff](#)]

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

Assigned Case Manager: [\[Select Me \]](#)

Program Participation
(Active only):

Customer Program Group:

Grant Code:

Provider:

Registration Source:

WTP Referrals:

Adult
Youth
Dislocated Worker
Statewide Youth
Incumbent Worker - Adult
Statewide Adult
Statewide Rapid Response Add'l Assistance DW
Statewide Dislocated Worker
National Dislocated Worker Grant (NDWG)
Local Funded Grant
None Selected

Case Management Criteria Search Option

- Click the **Search** 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 on 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	<input type="checkbox"/>
GSISSOJBROWN	Jane	Brown	6666		12			04/09/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>

[Save New List](#)

2 Records found

SEARCH CRITERIA: Last name begins with brown

Search Results and Actions

Search Result Actions

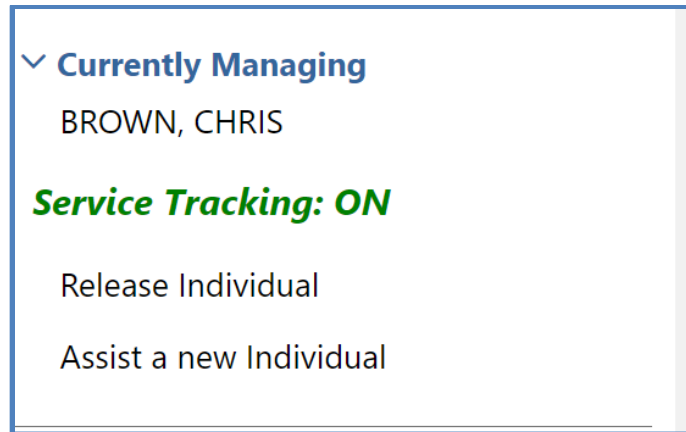
- **Summary Tab** - Case summary of services.
- **Case Notes Tab** - Case Notes for the individual.
- **Activities Tab** - Activities for the individual.
- **Programs Tab** - Wagner-Peyser program details.

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 (see Figure below).



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 (see figure above).

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.
 - **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 individuals 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 brief 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.

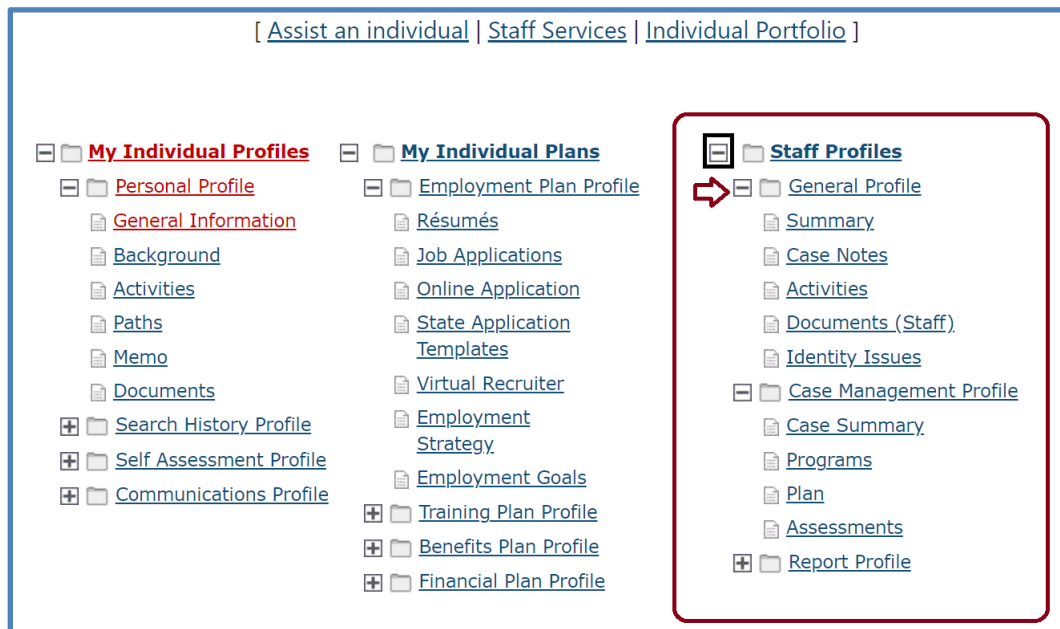
- **Online Training** - Displays the online training courses that the individual has taken or are currently working on.
- **Benefits Plan Profile** - Access basic information on government benefits for which the individual may be entitled. **Folders include:**
 - **Workforce Innovation and Opportunity 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. (see figure below)



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 WIOA 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.

WIOA 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 WIOA application wizard.
- Recognize WIOA 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.
- Acquire knowledge of eligibility dates.
- Acquire knowledge regarding how information from the registration form can pre-populate some fields in the application.
- Gain hands-on experience in completing verifications and uploading and linking a document.
- Gain experience in successfully completing the critical Employment page of the application.

The WIOA Application Form collects data to determine an individual's eligibility for the various WIOA customer groups. Staff complete the WIOA Application following a wizard format. The wizard progresses through multiple steps that prompt staff to enter necessary data. The number of steps will vary based on the type of eligible customer group. When the application is complete, the system determines eligibility for the respective WIOA customer group.

Staff privileges and system business rules may determine which of the activities and features discussed in this guide are available in the WIOA 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 WIOA 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 Workforce Investment Opportunity Act (WIOA) section and click the **Create Title I WIOA Application** link. The application wizard launches.



Launch the WIOA Application Wizard

Navigating the Application Wizard

Following is information to help you use the Application Wizard successfully.



WIOA Application Wizard Progress Bar and List of Steps

- The application wizard highlights the first tab, 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 WIOA 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.

The screenshot displays a form titled "WIOA Youth Funding: Out Of School Youth". It contains several fields with red exclamation marks indicating errors:

- * Customer Program Group:** A dropdown menu showing "None Selected" with a red exclamation mark to its right. Below it is a link: "[[Select program enrollment template](#)]".
- * LWDB:** A dropdown menu showing "Capital Area WF Board".
- * Office Location:** A dropdown menu showing "None Selected" with a red exclamation mark to its right.

Below these fields is a section titled "Enrollment Information" which includes:

- Grant:** A dropdown menu showing "None Selected".
- WIOA or Non-WIOA Partner Program:** A checkbox labeled "Yes, service is a WIOA or Non-WIOA Partner Program." which is currently unchecked.
- * Activity Code:** Two input fields, the first of which is empty, with a red exclamation mark to the right. Below it is a link: "[[Select Activity Code](#)]".

Sample Notification of an Unacceptable Entry in a Data Field

Completing the WIOA 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 Application Date and a WIOA Customer Group Eligibility Date.

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

WIOA + Add Program(s)

Nelson, Jim

Workforce Innovation and Opportunity Act (WIOA)

Application is Closed Never Enrolled

Case Application ID: 160347940

WIA Converted Application ID: Not Applicable

*** Application Date:**

Adult Eligibility Date:

Dislocated Worker Eligibility Date:

Youth Eligibility Date:

Incumbent Worker Eligibility Date:

WIOA Application Wizard – Intro Page

To complete the Intro page:

1. Confirm the **Application Date** is accurate.
2. Enter the Customer Group **Eligibility Date(s)** for the WIOA program.

Note: Application Date and Eligibility Date cannot be greater than 21 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.

Contact Information

* First Name:

Middle Initial:

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

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

* SSN Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Residential Address

* Address 1:

Address 2:

* Zip/Postal Code: [Find Zip Code](#)

* City:

* State:

* County/Borough/Parish:

* Country:

* Address Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

WIOA 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. Based on your site policies and procedures, then 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.

Demographic Information

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

*** Verify:** [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]
 Birth Certificate

Today's Age: 50

WIOA Eligibility Age (at earliest eligibility): 33

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

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

*** Verify:** [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]
 Birth Certificate

[Selective Service Website](#)

Registered for the Selective Service: Not Applicable

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]
 Not Applicable

Selective Service Registration Number:

Selective Service Registration Date:

WIOA Application Wizard – Demographic Page, 1 of 2

The following information should be completed only when the individual has self-identified they have a disability.

*** Type of Disability:**

*** Received services from a State Developmental Disabilities Agency (SDDA):** SSDA No Unknown

*** Received services from a State or Local mental health agency (LSMHA):** LSMHA No Unknown

*** Received services from a Home & Community Based Service Provider under a State Medicaid (HCBS) Waiver:** HCBS Waiver No Unknown

*** Disability Work Setting (CIE):**

*** Type of customized Employment Services Received:**

*** Received Disability Financial Capability:**

*** Section 504 Plan:** Yes No Unknown

*** Received Services from Vocational Rehabilitation:** Yes No Unknown

WIOA Application Wizard – Demographic Page, 2 of 2

To complete the Demographic page:

1. Verify the Date of Birth.
 - i. Click the **Verify** link to 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. Based on your site policies and procedures, 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

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

Transitioning Service Members

Please indicate your transitioning type and transitioning service member discharge date.

* Transitioning Service Member Type: Within 12 Months of Discharge

* Projected Discharge Date: 11/30/2021 Today

Check the box to indicate this is a partial application. This will allow navigation to any page that is available. Eligibility will not be fully determined nor will the application be marked as incomplete if any missing information is provided.

WIOA Application Wizard – Veteran Page Expanded

To complete the Veteran page:

1. Confirm and modify as needed, the Yes/No selections.
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. Based on your site policies and procedures, then 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. Fields in the Employment Information and Individual Employment History sections are prefilled with information previously saved in the system.

The screenshot shows the 'Employment Information' form. It includes a header with a Facebook icon and a note: 'Information entered on this screen is related to the specific individual only.' The form contains several sections: 'Employment Status' with a dropdown menu set to 'Not Employed'; 'Verify' with links for 'Verify', 'Scan', 'Upload', and 'Link', and a 'Self Attestation' checkbox; 'Not in the labor force' with radio buttons for 'Yes' and 'No' (selected), and a note about incarcerated individuals; 'If Employed, Individual is Under-Employed' with radio buttons for 'Yes', 'No', and 'Not Applicable' (selected); 'In a Registered Apprenticeship Program?' with radio buttons for 'Yes', 'No', and 'Did Not Disclose' (selected); 'UC Eligibility Status' with a dropdown menu set to 'Neither Claimant nor Exhaustee'; 'Claimant was referred by' with a dropdown menu set to 'None Selected'; 'Claimant has been exempted from work search' with radio buttons for 'Yes', 'No', and 'Unknown'; 'Date Claimant was exempted from work search' with a date input field and a 'Today' button; and 'UC Status Verify' with links for 'Verify', 'Scan', 'Upload', and 'Link'.

WIOA 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 display.
 - ii. Select the document or method used to confirm the individual's UC status and click **Verify** again to hide the list.
 - iii. Based on your site policies and procedures, 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 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 background profile.
8. In the Employment Status at Dislocated Worker Eligibility, provide a response.
9. Select a Dislocated Worker Category for the Dislocated Worker Eligibility Customer Group and select a Verify that is directly associated with the Category Number selected.
10. Provide any required information having to do with the Dislocated Worker employer.
11. 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:

* High school diploma or equivalent received: Yes No

* Highest education level completed:

* Verify: [\[Verify | Scan | Upload | Link \]](#)
✓ Other Applicable Documentation, (specify)

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

* School Status:

* Verify: [\[Verify | Scan | Upload | Link \]](#)
✓ School records

Education Partner Services

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

* Receiving services from YouthBuild: Yes No Did not self-identify

WIOA 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 and verify.
3. Select the Highest education level completed and verify.
4. Indicate the School Status and verify.
5. Specify if they are Receiving services from Adult Education (WIOA Title II) or services from Vocational Education (Carl Perkins).
6. Specify if they are Receiving services from YouthBuild.
7. Specify if they are Receiving services from Job Corps.
8. Specify if they are Receiving services from Vocational Education (Carl Perkins).
9. 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

WIOA 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 E&T, Pell Grant, and Ticket-to-Work Holder).
2. Click the **Next** button to save the data and advance to the Barriers page.

Individual Barriers

Individual Barriers

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

* English Language Learner: Yes No

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

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

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

✓ School record of reading and/or math skills determined within the previous 6 months of application

[Add/View Basic Skills Scores](#)

* Homeless: Yes No

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

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

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

Barriers To Employment

Disabled: No

* Displaced Homemaker: Yes No

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

WIOA Application Wizard – Individual Barriers Page

To complete the Barriers page:

1. In the Individual Barriers section, select the radio button to indicate a barrier due to English Language Learner, Basic Skills Deficient, Homeless, Ex-Offender.
2. In the Barriers to Employment section, select the radio button to indicate a barrier due to Displaced Homemaker, Long Term unemployed, Within 2 years of exhausting TANF, Hawaiian Native, Single Parent, Cultural Barriers, National Farmworker Jobs Program participation, Eligible Migrant Seasonal

Farmworker, and Meets Governor’s special barriers to employment.

3. Click **Next** to determine eligibility on the Eligibility Summary page.

Income Information

Income Information

Due to the individuals disability, they Yes No
qualify as a Family of 1:

Low income has not been established based on previous entries. Therefore, low income will be based on family size and income.

* Family Size:

* Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]
✓ Lease

* Annualized Family Income (last 6 months X2):

* Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]
✓ Bank statements (direct deposit)

[Income Table](#)

WIOA Application Wizard – Income Information Page

The Income Information page determines whether a participant has identified any sources of Low Income. If they have identified a source of low income, such as receiving SNAP, the system requires no additional actions, and the staff member can proceed to the next page.

Note: Please follow policy requirements for entering income data.

If no sources of low income are identified, the staff member will have to complete whether they qualify as a Family of 1, Family Size, and Annualized Family Income to determine low-income eligibility.

A link to the state or region’s Income Table is also available to review the low-income guidelines for the region.

Click **Next** to continue.

Eligibility Summary Page

Workforce Innovation and Opportunity Act (WIOA) Eligibility Information

Applicant Eligibility

Applicant meets the definition for low income: Yes No

Income Table: [Income Table](#)

Program	Eligible	Priority	Calculated Exception/Limitation	Reason(s) Not Eligible	Action
Adult	Yes				<input type="checkbox"/> Inactive
Dislocated Worker	Undetermined-2			No DW Eligibility Date.	<input type="checkbox"/> Inactive
Youth	Undetermined -2			No Youth Eligibility Date.	<input type="checkbox"/> Inactive

VET = Veteran, BSD = Basic Skills Deficient, PA = Public Assistance, LI = Low Income, SLP = Additional Priorities

WIOA Application Wizard –Applicant Eligibility Page Excerpt

This Eligibility Information page displays the applicant’s eligibility status for various WIOA customer groups, including Adult, Dislocated Worker, and Youth. Based on the information provided in the application, eligible customer groups will be highlighted in green. Information on Priority Calculated Exceptions, Reason(s) Not Eligible, and additional Actions are provided. Authorized staff can Inactivate specific programs if determined that pathway should not be used for service enrollments.

The next section allows for eligibility in specific WIOA Grants, including Incumbent Worker, National Dislocated Worker Grant, Statewide Adult Eligibility, Statewide Youth Eligibility, and Statewide Rapid Response Additional Assistance Eligibility. Change

the radio button to Yes for those grants that are associated with the customer group eligibilities displayed in the table above. This will allow services associated with these grants to occur later during the enrollment process.

Note: The system will identify grant types for which the participant is not eligible by greying out the ability to select **Yes** for them. Blue text will indicate that the participant does not meet the requirements for these grants, such as Incumbent Worker Eligibility.

There are additional sections related to Non-WIOA Grants and Grants. The values displayed under each heading derive from the WIT Administrative System. If there are services associated with these grant identifiers that staff wish to enroll the participant, staff will select Yes for those grants. The grant names will not appear otherwise.

National Dislocated Worker Grant NDWG: Yes No Not Applicable Inactive

Statewide Adult Eligibility: Yes No Not Applicable Inactive

Statewide Dislocated Worker Eligibility: Yes No Not Applicable Inactive

Statewide Youth Eligibility: Yes No Not Applicable Inactive
Applicant does not meet the requirements for Statewide Youth eligibility.

Statewide Rapid Response Additional Assistance Eligibility: Yes No Not Applicable Inactive

Grants

Grant Type	Grant ID	Grant Name	Local
National DW Grant (NDWG)	6	National Dislocated Worker Grant	Not Defined

WIOA Grant Section of the WIOA Eligibility Page

At the bottom of the page is a Staff Information and Signature section.

Staff Information

* Staff Position:

Record Review Date: [me Today](#)

Record Review Staff ID:

Met Quality Requirements: Yes No

Current Case Manager: Case currently Not Assigned to a Case Manager
[Assign Case Manager](#)

[Assign Me](#)
[Remove Case Manager Assignment](#)

Previous Case Manager:

Signature

Create PDF

Include Staff Signature

[Applicant Signature](#) _____

WIOA Application Wizard - Staff Information and Signature

Select any other optional tasks:

- Assign a Case Manager for the participant, or even assign yourself as the case manager if you are set up within a case assignment group.
- Create PDF to save a PDF version of the WIOA form to the individual's documents folder.
- Include Staff Signature and Applicant Signature to add digital signatures.
- Click the Print button to print the WIOA Application form with or without disability information.

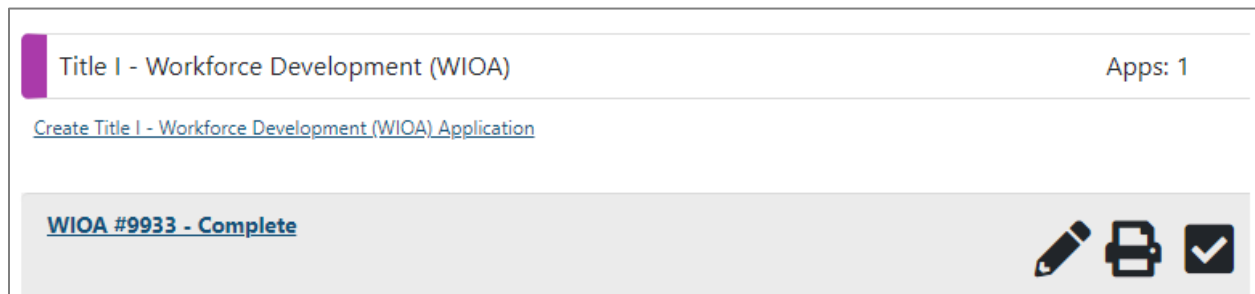
1. Click **Finish** to complete the application. A Finished Application Confirmation pop-up window displays, indicating that the

completed WIOA 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 WIOA Participation record (as described in **WIOA Application Form** section).

2. If prepared to provide the first service, click on the Participation link; if not, go back to the Programs tab.

Viewing the WIOA Application

Once the WIOA application has been successfully completed, a link will display for the application in the Workforce Investment Opportunity Act section of the Programs tab, indicating it is Complete.



Programs Tab: WIOA 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.
- Another location to Print the form can be done from the Print icon on the right.
- To review verifications in the application, click the checkmark on the right.

WIOA Eligibility Summary Ribbon

Training Objectives

After completing this lesson, you will be able to:

- understand the information available in the Eligibility Summary ribbon.

The Eligibility Summary ribbon provides an alternate view of the Eligibility Summary page of the WIOA Application.

Adult Basic Career: Undetermined
Reason: No ABC Eligibility Date.
Adult: Yes
Dislocated Worker: Yes
Youth: Yes, Out-of-school

Sample WIOA Eligibility Summary Screen

Note: This option might be faster and simpler for staff to access, compared to opening the WIOA Application and accessing the Eligibility Summary page.

WIOA Participation Form

Training Objectives


After completing this lesson, you will be able to:

- understand the information available in the Eligibility Summary ribbon.
- understand how to access the Participation Form and what it is used for.
- hands-on experience in providing the current date and clicking Next to create a first service in WIOA.
- understand the connection between the Participation Form and the first service creation.


Staff must complete the participation form to provide details of the participant's status prior to enrolling in the program.

Ultimately this offers a before and after starting point for Common Measures reporting. Most of the required data on this form is prefilled, based on previously entered information. Upon successful completion of the WIOA Participation form, the system will display the next mandatory step – WIOA Enrollment.

To create a WIOA Participation record:

1. From the Individual's Programs tab, in the Workforce Investment Opportunity Act 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 WIOA Participation form displays with general information prefilled.

3. Enter the Participation Date.

General Information	
Create Staff:	John Marks (29303)
Create Date:	6/27/2023 3:48 PM
Edit Staff:	John Marks (29303)
Edit Date:	6/27/2023 4:01 PM
State ID:	11100
Name:	Grace Hernandez
Date of Birth:	04/03/2003
Application Date:	06/23/2023
Eligibility Date:	06/23/2023
Participation Information	
* Participation Date:	<input type="text" value="06/23/2023"/> (mm/dd/yyyy)  Today
Participation Age:	20

WIOA Participation Form

4. Click **Next** to continue to the Activity 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.

If desired, staff may continue directly to the program enrollment form to enter the individual’s first program service.

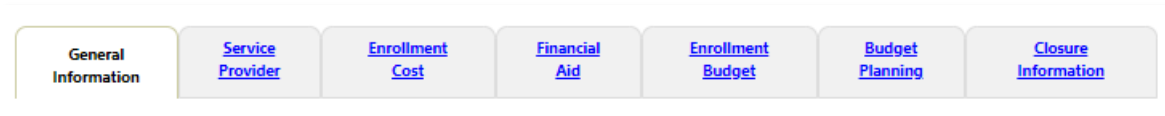
WIOA Activities, Enrollments, Services Ribbon

Training Objectives

After completing this lesson, you will be able to:

- understand how to conduct a step-by-step hands-on review of the enrollment tabs, including entering information on the General Information tab, Service Provider tab, and the Closure Information tab for non-fundable enrollments.

This form is a series of tabs for recording each activity in the WIOA 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.

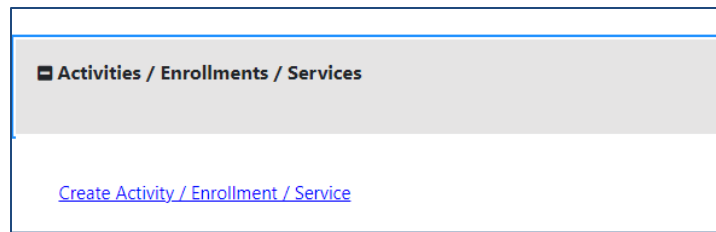


WIOA Service Enrollment Form Tabs

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

To create a WIOA Service Enrollment record:

1. From the Individual's Programs tab, in the Workforce Innovation Opportunity Act 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

The WIOA 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 WIOA application process.
2. Select the staff member LWDB region.
3. Select the staff member Office Location.

General Information	Service Provider	Enrollment Cost
General Information		
Participant User Name:	@VICTORY1	
Participant State ID:	33904	
Last Name, First Name MI:	Anthony, Mark	
Address:	156 Hollywood Hills Drive Fort Myers, FL 33916	
Application Summary:	Program: Title I - Workforce Development (WIOA) Application Date: 01/27/2021 Earliest Eligibility Date: 01/27/2021	
Participation Date:	01/27/2021	
* Customer Program Group:	<input type="text" value="10B - Adult - Individualized Services/Training"/> [Select program enrollment template.]	
* LWDB:	<input type="text" value="CareerSource Southwest Florida"/>	
* Office Location:	<input type="text" value="CareerSource Southwest Florida - 4740 - Col"/>	

WIOA Enrollment Form - General Information Tab Partial

- In the Enrollment Information area, select the desired grant, if applicable.

Note: If you did not make a grant selection in the WIOA Application, no values will be displayed for selection purposes.

- In the Enrollment Information area, specify whether this activity service falls under a WIOA or Non-WIOA Partner Program.
 - If Yes, the page will refresh. From the **Select Partner** drop-down list, select the desired program name (as shown in the figure below).

Note: Selected Partner Program agencies fund activity services; therefore, no fund tracking will occur in the system for these selections. Fund tracking will be deployed at a later time.

Enrollment Information

Grant:

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

*** Activity Code:**
[\[Select Activity Code\]](#)

** An actual begin date or a projected begin date is required.*

Projected Begin Date: (mm/dd/yyyy) Today

Actual Begin Date: (mm/dd/yyyy) Today

*** Projected End Date:** (mm/dd/yyyy) Today

Service Provided
[Virtual/Online \(Opens in a new window\):](#)

WIOA Enrollment Information Screen

- Click the **Select Activity Code** link and choose the desired program activity or service from the list displayed in a pop-up window (as shown in the figure above).

Note: The system relies on critical data relationships (customer program group, LWDB, provider type) to determine which service activities staff may select from. Enter the activity’s Actual Begin Date or Projected Begin Date. On the first service, this will be the same as the Participation Date, and the date can’t be edited.

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

- Enter the activity’s Projected End Date.

8. If this is a training activity, complete all known or required fields.
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. Select the following links to select the required service provider and service data (as shown in the figure on the next page).
 - 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 select training activities.)

Enrollment Service Provider Information

Enrollment Summary: Enrollment ID: 1672417
 Username: GENESIMONS
 TAA Application ID: 401000536
 Activity Code: 102 - Initial Assessment
 Activity Dates: 8/7/2019 - 8/7/2019

*** Provider:**
[\[Select Provider\]](#)

*** Service, Course or Contract:**
[\[Select Service Course or Contract\]](#)

Provider Locations:

[\[Select Provider Locations\]](#)

Provider Contacts:
[\[Select Provider Contacts\]](#)

*** Occupational Training Code:** Not Applicable

Provider Code	Provider Name	Address	Programs Available
5903	Conversion Provider		1
2240	Equifax Workforce Solutions	11432 Lackland Road Saint Louis, MO 63146-1111	1
15007	Tennessee Dept of Labor and Workforce	220 French landing Drive Nashville, TN 37243	1

WIOA Enrollment Form – Enrollment Service Provider Tab

Note: The provider data available for selection depends on information recorded on the General Information tab. The system displays eligible provider program information based on the Customer Program Group, the LWDB, and the activity service code.

For services that require an Occupation Code, an Occupational Training Code link appears here 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 an enrollment. If the activity being added is not a funded service, the enrollment procedure will advance from the Service Provider tab to the Closure tab.

To enter closure data:

1. If the individual has completed the activity, enter the Last Activity Date and Completion Code status.
2. If the activity requires credential information to be entered, additional required fields will appear for a completion code.

3. Add any case notes, as desired, by clicking the **Add a new Case Note** link.
4. If the activity is ongoing and the individual has not completed it, simply click the **Finish** button to save your data entry and return to the updated Programs tab. Clicking Finish will return you to the updated Programs tab, with the activities / enrollments / services displayed in the WIOA Services Table, as shown in the following figure.

PE ⓘ	EE ⓘ	Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
			205 - Individual Employment Plan (IEP/EDP) No Provider Information		Adult	N/A	06/23/2023	06/23/2023	Close
			203 - Comprehensive Objective Assessment No Provider Information		Adult	N/A	06/23/2023	06/23/2023	06/23/2023 Successful Completion

Page of 1

Rows:

WIOA Service Table

You can continue to record additional services for individuals by clicking the Create Activity / Enrollment / Service link and following the previous steps for additional enrollment in WIOA activities.

Managing the WIOA 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 current 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
- 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.

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 WIOA 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.

[Basic Skills Assessment](#)
Select this option to enter or edit basic skills assessment entries for this Individual.

[Aptitudes](#)
Select this option to edit Aptitude Assessment entries for this individual.

[Other Assessments](#)
Select this option to enter or edit other assessment entries for this Individual.

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.

Note: Individuals considered basic skills deficient may not necessarily require a formal skills assessment.

- **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 and lists 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 LWDB. LWDB 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 scoring method 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 can be 0.00 to 99.
7. Specify the Test Version taken.
8. Specify if the Customer meets the definition of Basic Literacy Skills deficient.

Note: If the Reading, Math, or Language score is less than 9.0, or equal to 87.0, the system automatically records a **Yes**.

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 redisplay.

Individual Name:	King, Amber S	
* Assessment Date:	08/29/2017	
* Local Workforce Investment Area/Board:	Greensboro/High Point/Guilford Workforce Development Board	
Reading Test Given:	Test of Adult Basic Education (TABE)	
Reading Score Type:	Grade Equivalent	
Reading Test Result:	06.0	Format: 99.9 Grade Equivalent, 9999 Raw Score
Specify:		
Reading Test Version:	9	
Math Test Given:	Test of Adult Basic Education (TABE)	
Math Score Type:	Grade Equivalent	
Math Test Result:	07.8	Format: 99.9 Grade Equivalent, 9999 Raw Score
Specify:		
Math Test Version:	9	
Language Test Given:	None Selected	
Language Score Type:	Not Applicable	
Language Test Result:	0	Format: 99.9 Grade Equivalent, 9999 Raw Score
Specify:		
Language Test Version:		
* Customer meets the definition of Basic Literacy Skills deficient:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
WP Service Record	None Selected	
Staff User - Add:	4938033 Hardie, Jeanette	
Staff User ID - Last Edited:	4938033 Hardie, Jeanette	
* Office:	NCWorks Career Center- Guilford County	
Create date:	08/29/2017	
Identification Number:	72373	
Edit Date:		
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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.

Aptitude Assessments		
Date	Test Name	Action
03/15/2019	SAGE	Edit Delete Print

Viewing page 1 of 1

[Add Aptitude Assessment](#)

Aptitude Assessment Screen

- 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.
- Select the LWDB/Region, Office Location, and Test Name from the drop-down lists, and enter the Assessment Date.
- For each of the areas tested, enter the test scores.
- Enter any additional Comments and click **Save**. Aptitude information will then display.

Aptitude Assessment	
Individual Name:	Herbert, Yolanda
State ID:	0
* LWDB/Region:	CareerSource Pinellas
* Office Location:	None Selected
* Test Name:	GATB
* Assessment Date:	10/07/2020 Today
Reasoning:	<input type="text"/> Format: 999
Math:	<input type="text"/> Format: 999
Language:	<input type="text"/> Format: 999
General Learning:	<input type="text"/> Format: 999
Verbal Ability:	<input type="text"/> Format: 999
Numerical Ability:	<input type="text"/> Format: 999
Spatial Perception:	<input type="text"/> Format: 999

Completed Aptitude Score Page

Other Assessments

The Other Assessments category displays assessments that do not fit the other categories, including typing tests. It can be customized by the client as well.

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)

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 WIOA 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., 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.

General Information

User Name: GSIWIOA_2

User ID: 30032

State ID: 11100

* Program: WIOA

* Application ID: 9933

* LWIA: Capital Area WF Board

* Office: 123 WF SOL Capital Area East

* Assessment Create Date: 06/23/2023 Today

Attach Active Plan: Yes No

IEP ID #

Age at Assessment: 20

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).

Program Expectations

* Are you seeking immediate employment Yes No

* What services are you seeking

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

Education Assistance
Employment Assistance

[\[Clear Text \]](#)

Objective Assessment Wizard – Program Expectations Page

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).

Education History

Highest Grade Completed: 10th Grade Completed

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.

High school dropout
Basic skills deficient

[Clear Text]

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).

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.

Operate personal and/or company vehicle
 Manage daily itinerary
 Read and interpret customer information
 Navigate local roads and highways
 Utilize time management skills
 Utilize communication skills

[Clear Text]

Employment History

Employer	Start/End Dates	State	Action
Tuesday Morning	03/2022 - 06/2023	TX	Edit Delete

[Add a New Employment History]

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).

Household & Income

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

Name	Relationship	Age	Income Source	Annualized Income	Action
Tina Hernandez	Parent	51	Employment	\$23,000.00	Edit Delete
Grace Hernandez	Self	20	No Income	\$0.00	Edit Delete
			Annualized Total	\$23,000.00	

[\[Add a New Household Member\]](#)

Household & Income Summary

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

Family qualifies as low income

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 Admin privilege 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.

Work Readiness

Number of Children under 18

Dependent Care Needs

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

Dependent Care Comments:

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

The client is 4 months pregnant and will request pre- and post-natal care.

[Clear Text]

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.

Health & Behavioral Observations

Health

- Lacks Medical Insurance Coverage
- Disclosed Disability
- Needs Glasses
- Needs Dental Work
- Speech Impairment
- Cannot Afford Medication
- Reasonable Accommodation Required
- Limitations in Ability to Work Certain Jobs

- Health has been cause for Absences from Job
- Pending Surgery or Medical Leave
- Not at this time

Behavior

- Demonstrates Low Self-Esteem
- Demonstrates Behavioral Problems
- Requires Medication

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 Admin privilege that would allow you to edit, view only, or not access this page at all.

Criminal Background

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

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

Arrests

Arrests: No arrest record
 Arrest Record
 Pending Court Case

Conviction: Convicted (adult)
 Adjudicated (juvenile)

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

Objective Assessment Wizard – Criminal Background Page

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 **Click Here** link to add, view, or edit any 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 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)

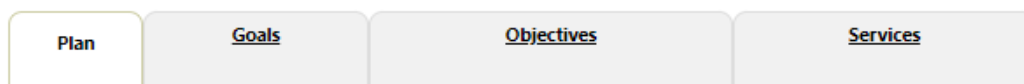
Training Objectives

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.

The screenshot shows a form titled "Plan Information" with the following fields:

- * Plan Start Date**: A date input field containing "06/23/2023", a "(mm/dd/yyyy)" label, a calendar icon, and a "Today" link.
- * LWDB/Region**: A dropdown menu with "Capital Area WF Board" selected.
- * Plan started in office location**: A dropdown menu with "123 WF SOL Capital Area East" selected.
- Plan closed on**: An empty date input field, a "(mm/dd/yyyy)" label, a calendar icon, and a "Today" link.

Create IEP - Plan Tab

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

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

The screenshot shows a form titled "Goal Information" with the following fields and values:

- * LWDB/Region:** Capital Area WF Board (dropdown menu)
- * Office:** 123 WF SOL Capital Area East (dropdown menu)
- * Program Affiliation:** Title I - Workforce Development (WIOA)
- * Type of Goal:** Education (dropdown menu)
- * Term of Goal:** Long Term (dropdown menu)
- * Description of Goal:** Attend GED training courses (text area)
- * Date Established:** 06/23/2023 (calendar icon) Today (link)

Create IEP – Add New Goal Page

4. In the Goal Information section, select a LWDB/Region and Office.
5. Check Program Affiliation(s).
6. Select a Type of Goal: Employment, Training, Schooling, etc.
7. Select the Term of Goal: Short Term, Long Term, Intermediate Term.
8. Enter a Description of Goal.
9. Enter the Date Established for the goal.

10. 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.

11. Enter any additional information in the Goal Details text box.
12. Click **Save**. The Goals tab redisplay with the added goal along with links to Edit or Delete.
13. Repeat this procedure for as many goals as desired.
14. 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:

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

Objective Information	
* Goal	Attend GED training courses ▾
Goal Date Established	6/23/2023
* LWDB/Region	Capital Area WF Board ▾
* Office Location	123 WF SOL Capital Area East ▾
* Program Affiliation	Title I - Workforce Development (WIOA) ▾
* Objective	Research where to take the GED
* Date Established	06/23/2023 (mm/dd/yyyy) 📅 Today
* Review Date	08/25/2023 (mm/dd/yyyy) 📅 Today
Actual Completion Date	(mm/dd/yyyy) 📅 Today
Completion Status	Open ▾

Create IEP – Add New Objective Page (Manual Entry)

16. Select the Goal to be associated with this objective. The Goal Date Established field fills in automatically with the goal date.
17. Select the LWDB/Region, Office Location, and Program Affiliation.
18. Name the Objective, which is an activity that will serve to achieve the associated goal.
19. Enter the Date Established for the objective and the Review Date on which progress should be evaluated (defaults to 45 days after Established Date).

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.

20. Enter any additional information in the Objective Details text box.
21. Click **Save**. The Objectives tab redisplay with the added objective along with links to Edit or Delete.
22. 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:

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

Objective Information

* **Goal**

* **LWDB/Region**

* **Office Location**

* **Program Affiliation**

	Pre-defined Objectives	Date Established	Review Date
<input type="checkbox"/>	Resume Writing	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today
<input type="checkbox"/>	Counseling	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today
<input type="checkbox"/>	Mentoring	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today
<input type="checkbox"/>	Skill Assessment	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today
<input type="checkbox"/>	Referral	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today

Create IEP – Select Pre-Defined Objective Page

- 27. Click the checkbox in the left column for each objective to add to the individual’s program goal.
- 28. 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.

29. Click **Save**. The Objectives tab redisplay with the added objective, along with links to Edit or Delete.
30. 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
9933 - WIOA	165 - Referral to Child Care (CC) services	A - 06/23/2023	P - 06/23/2023		29303
9933 - WIOA	166 - Referral to Adult Education and Literacy (AEL) services	A - 06/23/2023	P - 06/23/2023		29303
9933 - WIOA	203 - Comprehensive Objective Assessment	A - 06/23/2023	A - 06/23/2023		29303
9933 - WIOA	205 - Individual Employment Plan (IEP/EDP)	A - 06/23/2023	A - 06/23/2023	Employment Service	29303
9933 - WIOA	205 - Individual Employment Plan (IEP/EDP)	A - 06/23/2023	P - 06/23/2023		29303
9933 - WIOA	327 - Support Service - Training-Related Expenses	A - 06/23/2023	A - 06/23/2023		29303

Create IEP – Services Tab

Note: By default, the system will automatically create service/activity 205 – Individual Employment Plan (IEP/EDP) when staff creates the service and display Employment Service under the Provider column heading.

31. Click **Finish** to complete the IEP/SS plan. The Plan tab of Case Management Profile redisplay 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

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

Plan Start Date 05/13/2019

LWDB/Region CareerSource Capital Region

Plan started in office location CareerSource Capital Region - 4135

Plan closed on

When printing plan do you want to print services?

When printing plan do you want to print Goals?

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).

The screenshot shows a web form titled "Remote Signature". It has two rows of input fields: "Applicant Signature:" and "Staff Signature:". To the right of these fields is a red-bordered box containing two "Capture Signature" buttons, each with a stylized signature icon. At the bottom of the form are two green buttons: "Return" and "Print".

Remote Signature Section of IEP Plan Page

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

The pop-up window is titled "Select Signature Input Method". It contains two options: "Manual" with a mouse icon and the text "Using a pointer device", and "Message" with a speech bubble icon and the text "Send signature request from the Message Center". A blue "Cancel" button is located at the bottom right.

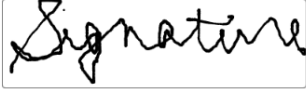
Signature Capture Method Pop-up Window

- i. For customers who are present, in-person, click the **Mouse** icon.

Read the certification of understanding statements, then use the mouse to write the signature. Click **Apply** to save it and return to the Plan page.

CERTIFICATION OF UNDERSTANDING: I also understand, acknowledge, agree and certify that:

- I accept my responsibilities in the use of electronic signatures as described on this form.
- My execution of an electronic signature performed on this system is the legally binding equivalent of my traditional handwritten signature, and I am accountable and responsible for actions performed under such an electronic signature
- I may not share components of my electronic signature such that my signature could be executed by another individual. Such components may include, but are not limited to, computer passwords and/or unique identification tokens.



Clear Cancel Apply

Signature Capture Window

- 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).

Recipient Info

* Selected Recipient(s): Grace Hernandez

Selected Recipient(s) Number: 1

Recipient: Grace Hernandez

Sender Information

* From:

* Created by:

Delivery Method

* Select Method:

- Internal Message (Message Center)
- Email (If Available)
- Text Message (If Available)
- Use Recipient's Preferred Notification Method

Request Read Receipt: Yes No

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

Compose Electronic Signature Request Message Page, Top Portion

Message

* **Subject:**

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

[Rich Text Editor toolbar with icons for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Search, and others]

Styles - | Format - | Font - | Size - | [Font Color] | [Background Color] | [Link] | [Image]

Hello Grace Hernandez,

John Marks has sent you a document to view and sign. Please click on the view document link below to begin signing.

[Clear Text | Remove All Formatting]
 [Insert Template | Insert Variable | Preview Message]

Signature Block Options

Add Signature:

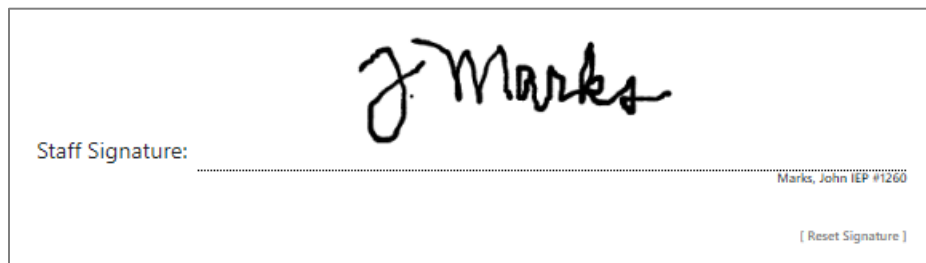
Office for Signature:

Compose Electronic Signature Request Message Page, Bottom Portion

- iii. After clicking **Send**, the message is sent to the recipient’s Message Center, and the Plan page redisplay, 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.

4. To capture staff's signature:

- i. Click the **Capture Signature** link displayed on the Staff Signature line and follow the same steps as the customer. OR:
- ii. 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

5. 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 redisplay 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 (see figure above). 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 redisplay with the plan status showing as CLOSED.

WIOA Training Justification Form



Training Objectives

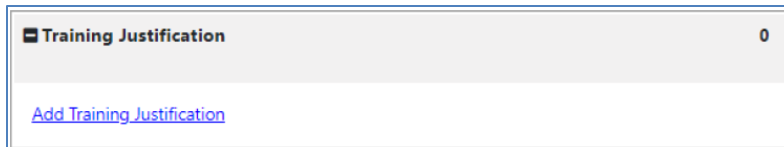
After completing this module, you will be able to:

- understand how and why the Training Justification form functions in WIOA.
- identify required training services.
- understand how to enter data and edit a training justification form.

To help determine the validity of WIOA program participant training enrollments, staff must complete the Training Justification form before they can enroll WIOA participants in a training activity. Authorized State staff will review each request and provide approval, as applicable. Examples of services that may be configured for the Training Justification form are service codes 300 (Occupational Skills Training); 301 (On-the-Job Training), and 304 (Customized Training).

To create a Training Justification request:

1. Find and assist the desired individual, then navigate to their Programs tab.
2. Click the plus sign icon  to expand their WIOA Application panel.
3. Click the plus sign icon  to expand the Training Justification ribbon and click the **Add Training Justification** link. The Training Justification entry page displays.



Training Justification Link

4. In the Location Information section, select/change the default the Office Location, if appropriate.
5. In the Training Justification section, enter the Training Justification Date.
6. Select the Recommended Types of Training. This indicates the training services to be available for enrollment.
7. Select the Occupation(s) expected from selected training by clicking the **Add an Occupation** link to display Add an Occupation controls.

- Select the Industry(ies) expected from selected training by clicking the **Add an Industry** link.

General Information	
User Name/Login Name:	GSIWIOA_2
User ID:	30032
State ID:	11100
Name:	Grace Hernandez
Training Justification ID:	1
Application Number:	9933
Eligibility Dates:	Adult: 06/23/2023 Dislocated Worker: 06/23/2023
Priority Level:	Adult: Level 2 - LI BSD Dislocated Worker: Level 2 - No Priority
Case Manager:	Trainer, Staff109
Location Information	
* LWDB:	Capital Area WF Board
* Office Location:	123 WF SOL Capital Area East
Training Justification	
* Training Justification Date:	06/23/2023 (mm/dd/yyyy) Today
* Recommended Types of Training:	[Check All] [UnCheck All] <input type="checkbox"/> On-the-job training <input type="checkbox"/> Skill Upgrading <input type="checkbox"/> Entrepreneurial Training <input checked="" type="checkbox"/> ABE or ESL in conjunction with Training <input type="checkbox"/> Customized Training <input type="checkbox"/> Other Occupational Skills Training <input type="checkbox"/> Prerequisite Training

Training Justification Form

- Confirm that the individual has met the following conditions for training under WIOA by selecting Yes for each condition met.

The individual has met the following conditions for training under the Workforce Innovation and Opportunity Act (WIOA)

* Condition 1- Is unlikely or unable to obtain or retain employment, that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through the career services alone: Yes No

* Condition 2- Is in need of training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment: Yes No

* Condition 3- Has the skills and qualifications to Yes No

Training Justification Conditions

10. In the Training Approval section, ensure that Meets Training Justification Requirements is Yes, based on Yes and/or No responses to each condition.

Note: Authorized staff will provide final approval and enter the training approval date. The system will display the name of the approving staff user.

11. In the Staff Information section, enter Comments as needed.
12. Click **Save**. The Training Justification panel displays the added record shown in a table. In response, the system will notify authorized staff of this pending request via the Message Center.

Viewing/Editing a Training Justification Form

Once a Training Justification record is saved, staff can view and edit it by selecting the **ID** hyperlink, as shown in the figure that follows.

ID	Training Justification Date	Training Type(s)	
1	6/23/2023	ABE or ESL in conjunction with Training	31

Existing Training Justification Record

If applicable, staff select **Save** to secure their edits.

WIOA Grant Outcome Ribbon

Training Objectives

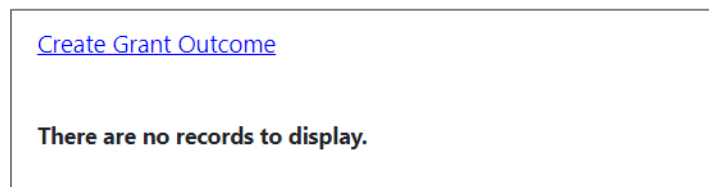
After completing the lesson, you will be able to:

- understand how grants become available based on the completion of the eligibility page of the WIOA application.
- identify potential grants and provide outcome information.

The WIOA Grant Outcome ribbon identifies grants associated with a specific individual's service delivery and allows staff to determine whether the individual is employed at grant outcome. The ability to associate a grant with a participant begins on the WIOA Application Eligibility page by identifying specific grant types for which the individual, based on their background, is able to receive services.

Follow these steps to document grant outcomes and gainful employment:

1. Click the **Grant Outcome** ribbon to open and expand its contents.
2. Click **Create Grant Outcome**.



Create Grant Outcome Link

3. From the General Information section, provide the correct LWDB/Region, Office Location and Staff Position.

4. In the Grant Outcome section, identify the grant from a drop-down. Only grants with associated services in the service table will appear.
5. A drop-down for Employed at Grant Outcome will ask if the participant gained employment. The responses are Yes, No and Unknown.

Grant Outcome Information

*** Grant:**

Grant Outcome Date:

*** Employed at Grant Outcome:**

[Add/Edit Entered Employment](#)

*** Grant Outcome:**

Grant Outcome Information Section

6. If the response is Yes, a link appears directly below the response. Here staff can click **Add/Edit Entered Employment** and provide details about the new employer and the job. On the Add/Edit Employer screen, provide the Employer Name. Based on an employer directory, after typing a few characters, options will appear. If the staff member selects the correct employer, information will prefill additional fields. There are also links to **Search Individual Employment History** (if the individual already listed the employer in their background information) and **Select from Internal Job Order/Placement** if the job originated on the site.

7. A second section, Job Information, requests information about the new job. There are several required fields that must be completed. Click the **Save** button at the bottom of the form when finished. This form is similar to the Add Employment ribbon.

Add/Edit Employer

Employer Information

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

*Employer Name:

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

Employer FEIN:

State Tax ID:

Address Line 1:

Address Line 2:

Add/Edit Employer Form

8. The final question in the Grant Outcome section asks for the specific outcome. The options are Employed at Exit, Not Employed at Exit, and Did Not Complete. Provide the correct response.

*Grant Outcome:

Grant Outcome Response

9. The last section of the form, Staff Information, is where staff can enter a case note and assign a case manager. Click **Save** to save the form and return to the Programs tab.

WIOA Measurable Skills Gain



Training Objectives

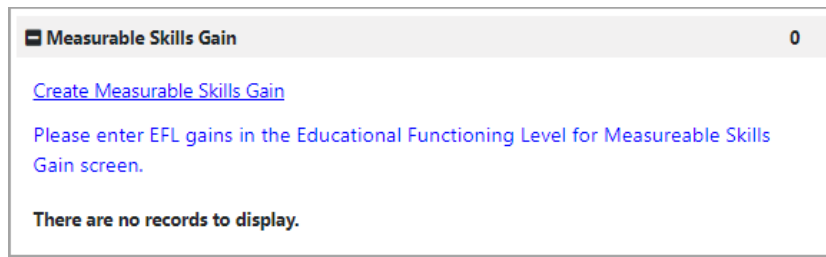
After completing this lesson, you will be able to:

- 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.

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 WIOA Application panel.
3. Click the plus sign icon  to expand the Measurable Skills Gain ribbon and click the **Create Measurable Skills Gain** link (see figure below).



Measurable Skills Gain Ribbon 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:**

Skill Attainment Information

Program: Title I - Workforce Development (WIOA)

*** Skill Type:**

*** Date Attained:** [Today](#)

*** Type of Achievement:**

***** [\[Verify | Scan | Upload | Link \]](#)
 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 redisplay 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 of 1

Rows:

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 (EFL) 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

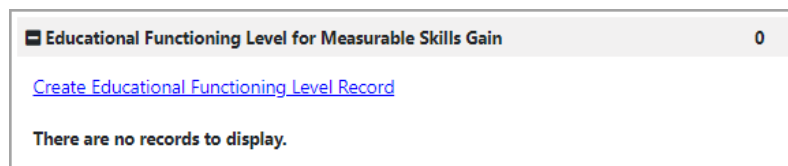
You can create an EFL record for an initial pre-test as soon as a WIOA Application is complete. A link at the top of the Educational Functioning Level for Measurable Skills Gain panel lets you create the pre-test record before assessment services start.

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 WIOA 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 for a pre-test (see figure below).

General Information

Participant - Last 4 SSN: Grace Hernandez (***-**-0001)

Case ID: 9933

*** Customer Group:**

*** LWIA/Region:**

One Stop Location:

Basic Skills Deficient at Eligibility: Yes

School Status at Program Entry: Not attending school,H.S. Dropout

Pre-Test

*** Date of Pre-Test:** [Today](#)

*** Assessment Category:**

*** Type of Assessment:**

Educational Functioning Level Page for Adding a Pre-Test

4. In the General Information section, select/confirm the Customer Group, LWDA/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).

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. Click **Save** to complete the EFL record. The Educational Functioning Level panel redisplay with the pre-test record in a table.

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.

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 WIOA 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).

Post Assessments

No post test records found.

Assessments beyond Year 3 are not reportable in the federal extract file, and will not count in federal performance calculations.

[Create Post Assessment Record](#)

Create Post-Assessment Record Link

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


Post Assessments

Test Type: Post-Test

*** Assessment Category:** ABE

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

Assessment Form/Version info:

*** Date Assessed:**  [Today](#)

*** Post Test Score:**

*** Educational Functioning Level:**

Middle/High Intermediate Basic Education (Level 4)

Grade Level Equivalent (GLE):

Participant remains Basic Skills deficient: Yes

*** Position:** ▼

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 redisplay with the post-test record displayed in the table.

WIOA Program Closure

Training Objectives

After completing this module, 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, the goal, and all completion dates.
- successfully complete the Closure Form and adding a new employer.
- understand how to delete a Closure if additional services are necessary.

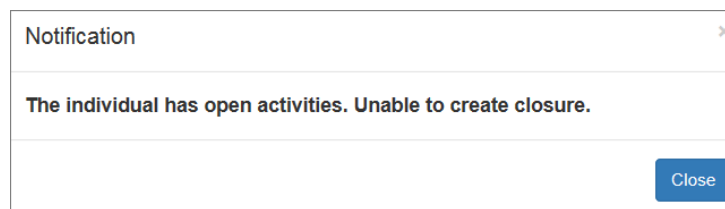
The Create Closure link appears after the first service is recorded for an individual. However, Case Closure may only be completed when each activity has an actual end date. Staff may use the case closure link (in much the same way as the WIOA Case Closure link is used) to record the following:

- Customer Satisfaction data, if applicable.
- Training information if they are enrolled in a training program offered and funded through WIOA.
- Employment information prior to customer's program exit.

To create a WIOA Closure:

1. Click the Closure ribbon, then click the **Create Closure** link. If all activities are properly closed, the General Info tab of the WIOA Closure form displays (as shown in the figure on the following page).

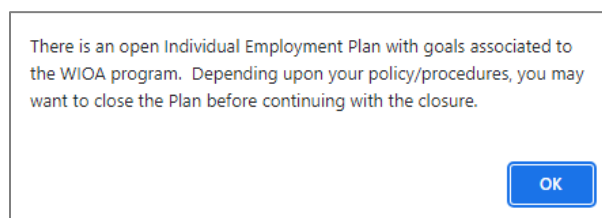
If you click Create Case Closure from the Programs Tab and activities are still open, the system displays a pop-up alert like the following.



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 objectives, 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.

General Information	
Username:	12785117
Name:	[REDACTED]
Last service date:	11/22/2022
Exit Date:	11/22/2022
Exit Reason:	Soft Exit
LWIA:	14 Capital Area WF Board
* Office Location:	123 WF SOL Capital Area East
Case closure date:	11/22/2022
	Reset Closure Date
* Accountability Closure/Exit Status:	Neither condition applies

WIOA Closure Screen General Info Section

2. In the General Info section:
 - i. Select your office location.
 - ii. Select the customer's accountability closure / exit status value.

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

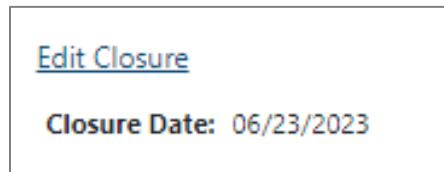
3. In the Outcome Information section:
 - i. Select the customer's school status at exit.

- ii. Select the **Verify** link and choose the desired verification documentation presented.
 - iii. (Optional) If necessary, associate the verification documentation with the customer's case file by selecting the **Scan**, **Upload**, or **Link** hyperlink.
 - iv. To close the list, select **Verify** again.
4. In the Employment Information section:
 - i. Select the customer's entered employment status.
 - 1) If Yes, select the **Add Employer** link.
 - 2) Complete the Add Employer form.
5. Select **Save**.
6. (Optional) In the Staff Information section, click to add a new case note.
7. (Optional) Reassign the case to another case manager.
8. Select **Save**.

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

Deleting a Case Closure

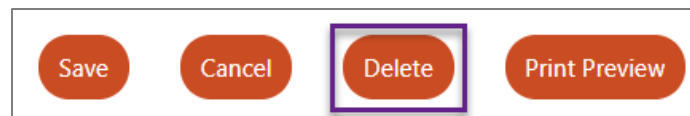
Upon successfully completing the WIOA Case Closure form, the system displays the updated Closure ribbon, a sample of which follows:



Edit Closure Link

To delete this record, staff selects the **Edit Closure** link. The Delete button is only available to authorized staff once you have saved this form. By deleting the form, the individual may continue to receive WIOA services for the current enrollment period.

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



Delete Button at bottom of Closure Form

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

WIOA Follow Up Services

Training Objectives

After completing this lesson, you will be able to:

- understand the impact of a closure form as it relates to service creation.
- create a follow-up service.
- remove follow-up services.

Once a case closure form is completed, the ability for a staff member to create additional services is limited. The only type of service that can be provided to a participant is a Follow Up Service, which is provided during the 4-quarter period after exit quarter.

Follow-up services are identified with the letter F. When accessing the Activity/Enrollment/Service table, staff members will complete information for the first tab, the General Information tab. The service options will only show F services as options in the drop-down. These are services that have been identified as not extending the WIOA closure date and will not be considered for performance measure reporting.

Activity Code	Activity Title	Description	Provider Type
F40	Follow-up-Job Search Assistance	Providing assistance during follow-up in employment seeking or job seeking skills subsequent to their last WIOA service when no other WIOA services are necessary.	PS - Office Services
F41	Follow-up-Ind. Counsel/Career Planning	Provision of guidance in the development of vocational and occupational goals and the means to achieve them and in the assessment of needs and abilities.	PS - Office Services
F42	Follow-up-Job clubs	To be used to record the attendance at a Job Club (A TWC staff facilitated group meeting for job seekers to gather and share job leads and discuss their job seeking experiences) meeting during follow-up.	PS - Office Services
		To be used to record the	PS -

WIOA Followup Service Code Selections

WIOA Program 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 WIOA 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 WIOA Exit/ Outcome (aka, hard exit) if the individual satisfies one of the established global exclusions. Otherwise, staff need not complete the Exit / Outcome form to initiate the individual's soft exit from the WIOA 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, Choices, and TAA. 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.

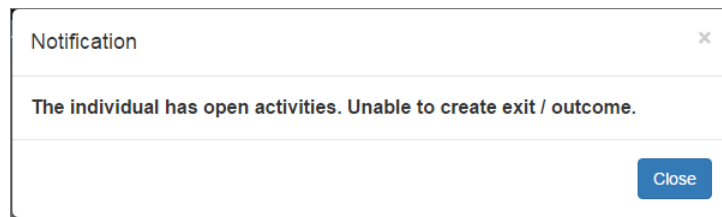
To manually terminate the individual's participation in the WIOA program (i.e., create a hard exit), perform the following steps:

1. Click to open the Exit/Outcome ribbon, and then click the **Create Exit/Outcome** link on the Programs tab (see sample below).



Programs Screen with Create Exit/Outcome Link

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



Open Activities Alert

2. To continue, staff must manually close out open WIOA activity services. Otherwise, the system will display the Outcome form, similar to the following figure:

General Information

Login Name: GSIWIOA_2

User ID: 30032

State ID: 11100

Name: Grace Hernandez

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

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

*** Staff Position:** Staff

Exit Information

*** Exit Date:** 06/23/2023 Today

Exit Reason:

- None Selected
- None Selected
- Institutionalized
- Health/Medical
- Deceased
- Reservist called to Active Duty
- In Foster Care and moved from area by foster care system

Alternate Contact Informa

WIOA Exit / Outcome Form

3. Complete the General Information, Exit Information, and Staff Information sections.
4. 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 WIOA Outcomes

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



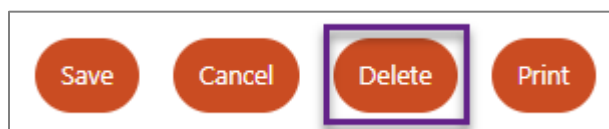
The screenshot shows a ribbon with a blue link labeled "Edit Exit/Outcome". Below the link, there are two fields: "Exit Date: 07/13/2023" and "Exit Reason: Health/Medical".

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.

Note: If the customer was co-enrolled in any of these programs – TAA, Wagner-Peyser, SNAP E&T, and/or Choices – the system will also delete the exit / outcome form for the respective program(s).

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



The screenshot shows four red buttons in a row: "Save", "Cancel", "Delete", and "Print". The "Delete" button is highlighted with a purple border.

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**.

WIOA Quarterly Follow-ups Ribbon

Training Objectives

After completing this lesson, you will be able to:

- understand how the quarterly follow-ups process functions in the system.

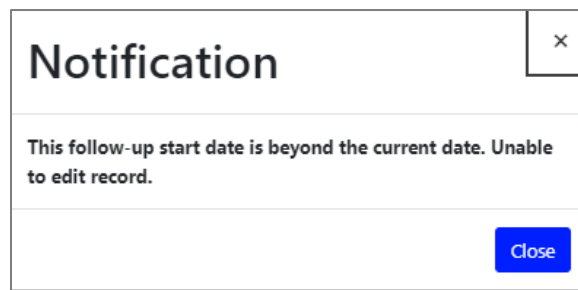
The Follow-ups panel is used by staff for the quarterly follow-ups that are required four times within a year after the participant exits the WIOA program. The system will not display the links for follow-ups and the table with the quarterly links until the participant has been officially exited from the WIOA program through the soft exit process.

Note: A follow-up is not required, and not displayed, for any individual who was hard exited from the program due to a global exclusion. WIOA program staff should also follow agency policy for co-enrolled individuals, in terms of which program unit is required to conduct and document the quarterly follow-up process for the exited individual.

Using the Follow-ups panel (see figure below), you can create two types of follow-ups for an individual:

- **Local follow-ups (optional)** – If local follow-ups are required as part of state or local policies, you can create them at any time after a soft exit has occurred for the WIOA participant (see upper left of figure below). The form and steps to complete it are identical to the steps described in this topic for the Quarterly Follow-Up Form, with few exceptions:


- Local follow-ups do not have a Contact Attempts section, which requires staff to identify the date, time, type of contact, and number of attempts.
- Local follow-up records are not reported federally.
- **Federally required quarterly follow-ups** – The system does not let you record federal follow-ups prematurely. If you click a quarterly follow-up link before the begin date for the quarter matching the Follow Up Type, the system displays a notification alert.




Unable to Edit Follow Up Record Notification Window

The system will not prevent you from entering data for a quarterly follow-up after its Required By date; however, if you record employment or educational credentials in a quarterly follow-up after the Required By date, they may not result in a positive outcome for performance measurement purposes.

To complete a quarterly follow-up:

1. Find and assist the desired individual, then navigate to their **Programs tab**.
2. Click the **plus sign icon**  to expand their **WIOA** program panel.

3. Click the **plus sign icon**  to expand the **Follow-ups** ribbon. In response, the system will display the quarterly follow up schedule:

[Create Local Follow Up](#)

Search:

Required By	Date Complete	Status	Follow Up Type
03/31/2023		Not Complete	1st Quarter After Exit
06/30/2023	11/22/2022	Completed	2nd Quarter After Exit
09/30/2023		Required	3rd Quarter After Exit
12/31/2023		Required	4th Quarter After Exit

WIOA Follow-ups Ribbon and Quarterly Follow-Up Form Links

4. Click the **desired Follow Up Type link** (1st, 2nd, 3rd, or 4th quarter after exit).

Note: If you are creating a local follow-up, select the **Create Local Follow Up** link at top left, above the required follow ups table.

The Follow-Up form displays for you to document your contact attempts, add/update any follow-up employment information (or education placement), and identify the current status at the quarterly follow-up. The top of the form has links to move to each area (see figure below).

5. In the **General Information** section:
 - i. If the applicant’s contact data has changed:
 - 1) Click the **Edit Contact Information** link at bottom of the section (see figure below).

2) Make changes to the displayed contact fields as needed.

* Address 1:	<input type="text" value="1630 CARDINAL ST"/>
Address 2:	<input type="text" value="128"/>
* City:	<input type="text" value="NACOGDOCHES"/>
* State:	<input type="text" value="Texas"/>
* Zip Code:	<input type="text" value="75961"/> Find Zip code
* Primary Phone Number:	<input type="text" value="512"/> <input type="text" value="635"/> <input type="text" value="7062"/> Ext. <input type="text"/>
Primary Phone Type:	<input type="text" value="None Selected"/>
Alternative Phone:	<input type="text" value="936"/> <input type="text" value="305"/> <input type="text" value="3840"/> Ext. <input type="text"/>
Alternative Phone Type:	<input type="text" value="None Selected"/>
* County/Borough/Parish:	<input type="text" value="Nacogdoches County"/>
* Country:	<input type="text" value="United States"/>

Follow-Up Form – Edit Contact Information Section

6. In the Alternate Contact Information section, to add or edit a contact, click the **Manage Alternate Contacts** link. A Contact List page displays existing alternate contacts (see figure below).
 - i. Click the **Edit** link to modify an existing alternate contact or the **Add Contact** button to add one.
 - ii. Add or edit fields displayed on the Contact Detail page and click **Save**. The Contact List page redisplay with changes.

Contact Detail	
* Contact Name:	<input type="text"/>
Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
City:	<input type="text"/>
State:	None Selected ▾
Zip Code:	<input type="text"/>
* Phone Number:	<input type="text"/> - <input type="text"/> - <input type="text"/>
Email Address:	<input type="text"/>
* Relationship:	None Selected ▾
Other Description:	<input type="text"/>
Date contact is no longer valid:	<input type="text"/> (mm/dd/yyyy) 📅

Follow-Up Form – Alternate Contact Information Section

- iii. Click **Return**. The added or edited contact is displayed in the table in the Alternate Contact Information section.

Note: These are the same alternate contacts identified on the Contact page of the WIOA Application or on the Exit/Outcome Form.

7. In the **Contact Attempts** section, document:

- i. Click the **Add Contact Attempt** link.
- ii. Enter data in the displayed fields for the new contact attempt (see figure below).
- iii. Click **Save Contact Attempt**. The attempt is displayed in the table.

Contact Attempts

Attempt Number	Date	Time	Type Of Contact
1	12/22/2021	Morning	Telephone - Individual

[Add Contact Attempt](#) [Exit Follow-up Screen](#)

Create New Contact Attempt

* Contact Date: [Today](#)

* Time of Day:

* Type Of Contact:

Other Description:

Follow-Up Form - Contact Attempts Section

- iv. If the attempt was unsuccessful, or you could not acquire information to complete the form, click the **Exit Follow-up Screen** link to leave the form. The record will be marked Pending until the Follow-Up form is completed at a later time.

Note: The maximum number of contact attempts allowed is indicated in red text at the bottom of the Contact Attempts section.

- 8. In the **Follow-up Employment Information** section, indicate if the individual **Worked in the Quarter** of the follow-up (see figure below).

- i. If **Yes**, then:
 - 1) Check the box to **Use primary employer from previous quarter** if applicable, then click the **Verify** link to verify the employer’s name, **OR**
 - 2) Click the **Add Employer** link to open an **Add/Edit Employer page**, enter information for the employer,

and click the **Save** button. The new employer is displayed in the Employer table.

ii. If **No**, then:

- 1) Continue to the Follow-up Education Information or Current Status at Follow-up section —a placement for education or a status at follow-up is required if no employment exists at follow-up.

Follow-up Employment Information

Employer Name: Imperial Air
2617 19th St S
Saint Petersburg, FL 33707

Employer Contact and Phone: HR
727-490-3833

* Worked in Quarter 10/1/2021 - 12/31/2021? Yes No

Use primary employer from previous quarter? Yes

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

Qtr	Employer Name	Primary Employer	Job Title	Start Date	End Date	Non-Traditional	Training Related	Action
2	Imperial Air	Yes	AC Tech	06/01/2020		No	Yes	Edit Delete
1	Imperial Air	Yes	AC Tech	06/01/2020		No	Yes	Edit Delete

[[Add Employer](#)]

Follow-up Employment Information Section

9. In the **Follow-up Education Information** section:
 - i. **Select** the type of education placement from the Education in Quarter drop-down list.
 - ii. Enter the **Date of Education Placement**.

Follow-up Education Information

Previous Follow-up Education Placement and Date Information: No Placement

* Education in Quarter 10/1/2021 - 12/31/2021: Occupational Skills Training (including advanced training) ▼

Date of Education Placement: 08/17/2021 [Today](#)

[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

Other Applicable Documentation (specify)

Follow-up Education Information Section

- iii. Click the **Verify** link to verify education placement. Enter the type of documentation used for current placement verification for WIOA.

An **Exit and Closure Information** section displays information at exit before the Current Status at Follow-up section. No actions are required for this section; it is strictly for information on the date of the soft exit and status at the time of exit.

10. In the **Current Status at Follow-up section**:

- i. Enter the date in the **Actual Date of Follow-Up field** (see figure below).
- ii. Select the **Contact Type**. If you select **Other** (Specify), describe the contact type in the **Other** (Specify) field.

Note: The first two fields are required. The Follow-up Status section (see figure below) is only required if no employment or education placement is identified for the follow-up record.

- iii. If applicable, select the Status at Follow-Up. If you select Other (specify), describe the status in the Other (specify) field.
- iv. Add Comments as desired.

Current Status at Follow-up

Follow-up Information:

* Actual Date of Follow-Up: 12/11/2021 [Today](#)

* Contact Type: Other (Specify)

Other (specify): local visit near home

Follow-up Status

This section is required only when no employment, no youth placement and no youth diploma/credential is recorded on the follow-up screen.

Status at Follow-Up: Transferred to other funding

Other (specify):

Comments:

Current Status at Follow-up Section

11. In the Staff Information section, you can change the LWDB/Region and office, add a Case Note, and perform Case Assignment, as desired (see figure below).
 - i. Modify the LWDB/Region and Office Location, if necessary. These are prefilled.
 - ii. To add a case note:
 - 1) Click the **Add a new Case Note** link.
 - 2) Complete applicable fields in the displayed Case Note page.
 - 3) Click **Save** to return to the Follow-Up form.

Staff Information

* LWIA/Region:

* Office Location:

Staff User Create: GSIISOFTX0T
 Create Date: 04/14/2021
 Staff User Edit: GSISA0
 Edit Date: 02/17/2022

[[Add a new Case Note](#) | [Show Filter Criteria](#)]

ID	Create Date	Subject	Action
221162796	12/11/2021	3rd Qtr follow-up (still employed)	
220022645	09/14/2021	2nd Qtr follow-up (still employed closure)	
219230171	06/25/2021	1st Qtr Follow-up	

Page 1 of 1 Rows: 10

Current Case Manager:

Group:

Case Manager:

Temporary Case Manager: Not Applicable

[Assign Case Manager](#)

[Assign Me](#)

[Remove Case Manager Assignment](#)

Closure Form Page - Staff Information Section

iii. To assign a different case manager:

1) Click the **Assign Me** link to assign the exited participant to your own case load for any follow-ups.
OR

2) Click the **Assign Case Manager** link.

3) Click an **Assign to this group** link to select from displayed case assignment groups.

4) Click a **Username** link to assign a case manager for this participant.

12. Click **Save** to save your edits. Once the Follow-Up record is saved, the system redisplay the Follow-ups panel with the

updated status indicated in the Follow Ups table (see figure below). You can view and edit a Follow-Up form by clicking its link in the Follow Up Type column.

Follow-ups 5

[Create Local Follow Up](#)

Search:

Required By	Date Complete	Status	Follow Up Type
06/30/2021	06/25/2021	Completed	1st Quarter After Exit
09/30/2021	09/14/2021	Completed	2nd Quarter After Exit
12/31/2021	01/21/2022	Completed	3rd Quarter After Exit
03/31/2022		Required	4th Quarter After Exit
	12/19/2021	Completed	Local

Updated Follow-ups Panel with Completed and Required Quarterly Follow-ups

Credential (Ribbon)



Training Objectives

After completing this lesson, you will be able to:

- Locate the Credential ribbon.
- Document credential achievements on behalf of program participants.

Staff can record information about the credentials a participant earns related to their program participation, such as occupational licenses and certificates.

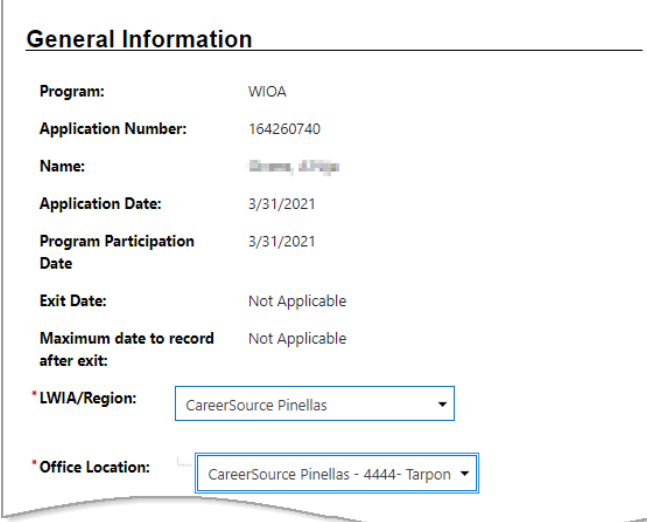
To create a credential:

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



Credential Panel and Link

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



General Information	
Program:	WIOA
Application Number:	164260740
Name:	[Blurred]
Application Date:	3/31/2021
Program Participation Date:	3/31/2021
Exit Date:	Not Applicable
Maximum date to record after exit:	Not Applicable
*LWIA/Region:	CareerSource Pinellas
*Office Location:	CareerSource Pinellas - 4444- Tarpon

Credential Page - General Information Section

6. In the **Credential Information section**, select the Credential Received by the individual (see figure below).
7. If **Other**, enter the credential name in the **Other** Credential field.
8. For Credential Verification, click the **Verify** link to select a verification document from the displayed list; click the Verify link again to collapse the list.

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

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

Credential Information

* Credential Received: High School Diploma

Other Credential:

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

* Date Credential Received: 05/18/2021 (mm/dd/yyyy) [Today](#)

Associate to Training/Activity record: 418 - Adult Education (GED) Enrollment - 4910546
[Search Activities/Services](#) [Remove Association](#)

[Save](#) [Cancel](#)

Activities List

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

[Close](#)

Credential Page - Credential Information Section and Activities List

- i. Click the **Select** link for the activity to be associated to the credential. The activity displays on the Credential page.
 - ii. If you need to change the association, you can click the **Search Activities/Services** link again and change the association. If you return to edit the credential after you save it, a **Remove Association** link will also display, and you can remove the association without replacing it.
11. Click **Save**. The Credentials panel redisplay with the credential record shown in a table (see figure below).

[Create Credential](#)

Search:

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

Page 1 of 1 Rows: 10

Credentials Table with Entered Credential Record

Once a Credential record is saved, you can view and edit the credential by clicking the link in the Credential column (see figure above). The edit page for the Credential form functions the same as the entry page, except that the page includes a Staff Information section.

At the bottom of the page, you can also perform the following actions:

- **Delete** – Click the **Delete** button to remove the Credential record. A pop-up message asks you to confirm the deletion. It may indicate that you do not have permissions for deletions, depending on how long ago the record was created and your staff permissions. Click **OK** to remove the record.
- **Print** – Click the **Print** button to display a printable copy of the WIOA Credentials record that includes an area for applicant and staff signatures and dates if the form needs to be printed and signed.

Add/Entered Employment (Ribbon)

Training Objectives



After completing this lesson, you will be able to:

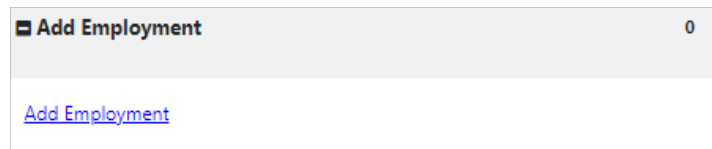
- Document a program participants entry into employment.
- Capture necessary information for internal job order placement records.
- Gather information for the participant's ongoing background employment history.

If an individual enters employment while receiving program services, staff can use an Employment form to add the employment record to associate with their program participation. The form lets you find and use information in the individual's employment history or internal job order placement records. You can also find a preferred employer in the system or enter all employment details manually.

Add Employment

To create an Employment record:

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



Add Employment Panel and Link

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

A screenshot of the "Add/Edit Employer" form. The form is divided into two main sections: "Employer Information" and "Job Information".

Employer Information:

- * Employer Name: Lowe's Home Improvement
- Verify Employer Name: [Verify | Scan | Upload | Link]
- Employer FEIN: 999001234
- Address Line 1: 12901 N Dale Mabry Hwy a
- City: Tampa
- State/Province: Florida
- County/Borough/Parish: Hillsborough County
- Zipcode: 33618
- Find Zip Code: [USPS]
- Country: United States
- Industry Code (NAICS): Search for NAICS Code
- Industry NAICS Code: 444110
- Industry NAICS Description: Home Centers
- * Primary Employer Contact Name: Sam Jones
- * Primary Employer Contact Phone Number: 727 - 494 - 5413 Ext
- Primary Employer Contact Email: sjones@lowes.com

Job Information:

- * Job Title: Kitchen Appliances Expert
- * Occupation: 41203100 Retail Salespersons
- * Is this a green job? Yes No
- * Hours Worked per Week: []
- * Hourly Wage: 36.50
- * Job Start Date: 04/15/2021
- Job End Date: []
- Reason for Leaving: None Select
- Additional Information on reason for leaving (120 characters max): Some HTML tags such as embedded videos are not allowed.

Other Fields:

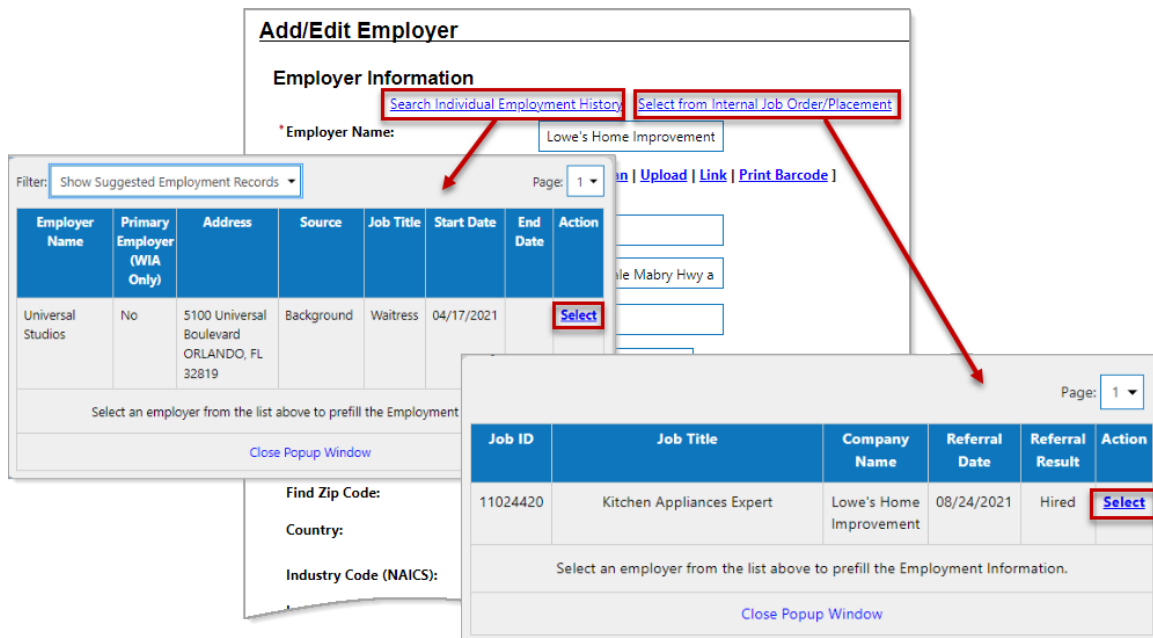
- * Primary Employer: Yes No
- * Receiving Fringe Benefits: Yes No
- Receiving Health Care Benefits: Yes No
- * Job Covered by Unemployment Compensation: Yes No
- * Is this Entrepreneurial and/or Self-Employment? Yes No
- * Is this a Registered Apprenticeship? Yes No
- * Is this active Military Service? Yes No
- * Is this considered Non-Traditional Employment? Yes No
- * Is this considered Training Related Employment? No
- Add to Employment History: Yes No

Buttons: Save, Cancel

Add/Edit Employer Page with Employer and Job Information Sections

- Enter the Employer Information and Job Information, taking note of the required fields marked with a red asterisk.

- i. If any employment history or internal job placements were previously entered as part of their application for a program or the individual’s Employment Plan activities, you can use links at the top of the Employer Information section to select an employer and prefill the employment information (see figure below).
6. Click either the **Search Individual Employment History** or **Select from Internal Job Order/Placement** link to display a pop-up window for employment records (see figure below).
 7. Click the **Select** link in the Action column and click **OK** to confirm the desired employment record. The information is filled in on the **Add/Edit Employer Page** for most fields in the Employer Information and some fields in the Job information section.



Selecting from Individual Employment History or Internal Job Order/Placement Pop-ups

- i. If employment history or internal job placements for the employer are not available, start the form by entering the **Employer Name**. The field will dynamically display matching employers who are registered in the system (see figure below).

8. If the desired employer's name and address show, select it from the list. The Employer Information is filled in.

The screenshot shows a web form titled "Add/Edit Employer". Under the "Employer Information" section, there are two links: "Search Individual Employment History" and "Select from Internal Job Order/Placement". The "Employer Name:" field contains "Lowe's" and is highlighted with a red box. A dropdown menu is open, showing a list of employers. The first three items are: "Lowe's Home Centers, Inc. - Tampa, FL 33611 (10 East Oak Road) 702.752.6336 Hector Todd", "Lowe's Home Centers, Inc. - Tampa, FL 33611 (10 East Oak Road) 702.752.6336 Maggie Vincent", and "Lowe's Home Centers, Inc. - Tampa, FL 33611 (10 East Oak Road) 702.752.6336 Ben Warren". The fourth item, "Lowe's Home Centers, Inc. - Tampa, FL 33911 (84 Second Road) 706.853.8160", is highlighted with a red box and has a mouse cursor over it. Below this are several other entries for "LOWE'S HOME CENTERS, INC." and "LOWE'S HOME CENTERS, LLC" with various addresses and phone numbers.

Auto-display of Preferred Employers as the Employer Name is Entered

- 9. Continue to make entries in all required fields, and to check any fields that were auto filled. This includes the fields for employer benefits and other **Yes** or **No** question at the bottom of the Job Information section. These are not auto filled.
- 10. Click the **Save** button. The Add Employment panel redisplay, with the added employment record listed in a table (as shown below).

■ Add Employment
1

[Add Employment](#)

Search:

Employer	Start/End Dates	City	Action
Lowe's Home Improvement	08/24/2021 - Present	Tampa	Edit Delete

Added Employment Record

Once an Employer record is saved, you can view and edit the record by clicking the **Edit** link in the Action column. You can also delete the record by clicking the **Delete** link (see figure above).

Note: The information entered here will also carry over to the employment history section of the individual's Background Wizard and the program's Case Closure form.

The edit page for the Employment records functions the same as the entry page, except that at the bottom of the page, you can also use a **Print** button to display a printable copy of the Employment record for the entered employer that includes an area for signatures and dates if the form needs to be printed and signed.