

## Desk Aid - Metrix Statewide Initiative

Boards must ensure that for each individual enrolled in Metrix services, appropriate staff documents the following in a WorkInTexas.com WIOA Program Application:

- Adult, Dislocated Worker, or Youth program eligibility, as applicable, including all required information.
- For new enrollments staff must complete the WIOA Application Wizard in WIT.com before an individual can be provided Metrix Services.

### Adding Adult/DW Metrix Services

#### **Certification Track Training and General Online Coursework**

Before staff enter the applicable Metrix Service, please look at the

**Activities / Enrollments / Services** Tab in WIT to make sure the WIOA **service sequencing** has been entered correctly for the Adult or Dislocated Worker.

#### WIOA Adult and Dislocated Worker Programs Sequence of Services

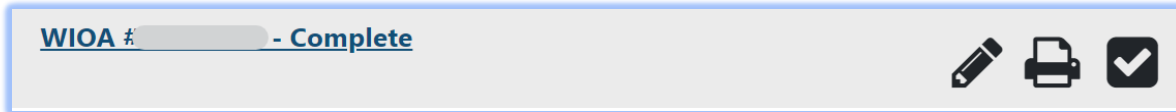
- **1st Service must be:** 203 - Comprehensive Objective Assessment
- **2nd Service must be:** 205 - Individual Employment Plan (IEP)
- **3rd rule:** All remaining services become available except for Follow-up Services.

If services 203 Comprehensive Objective Assessment and 205 Individual Employment Plan (IEP/EDP) does not show as a selection in the dropdown; this means that one or both services were not entered prior to conversion. Staff will need to go back to Program Ribbon to open

**Activities / Enrollments / Services** tab to verify if these services have been entered. If one or both have not been entered; **the missing services must be provided and entered** before the system will allow any other services to be added. Please note:

- Staff may see that the service 68 converted; **however, this will not suffice for the 205 required service; the 205 service must be entered.**

1. Staff must confirm that the Metrix grant has been added to the **Grants** section of the individual’s eligibility summary, **by Board Staff**. To add the Metrix grant to the Grants section in WIT, Board staff must: **PATH** > Click the Pencil Icon from the WIOA Application in order to edit the individuals Eligibility Summary.



**Page Displays** showing WIOA Application, staff will click on **Eligibility Summary** page displays **Applicant Eligibility**



Scroll to bottom of page to add the appropriate grant from the **Action Column**

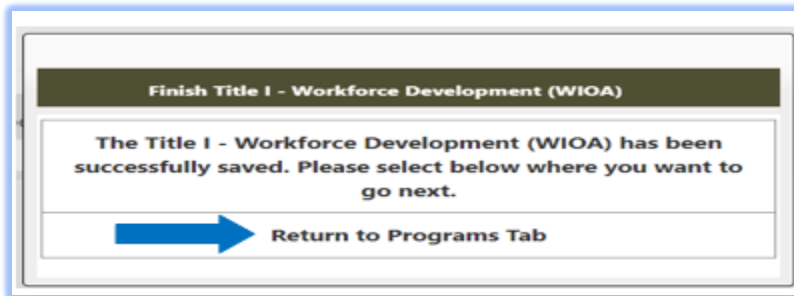
Select from the list of available grants.

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Statewide Dislocated Worker	29	WIOA Dislocated Worker Statewide	NA		Add
Statewide Dislocated Worker	35	Metrix - WIOA DW Grant	METDW		Add

2. Select **Add** and click **Finish** at the bottom of the page to save changes to the individual’s WIOA grant eligibility summary.



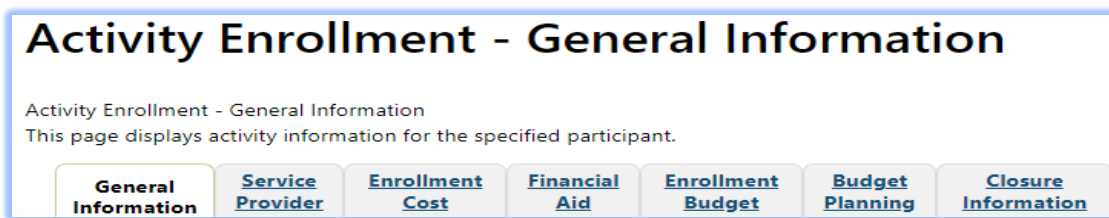
3. Click **Return to Programs Tab**



4. Assist an Individual > Staff Profiles > Case Management Profile > Programs

- Scroll down to the **WIOA Program Ribbon**
- Click on **Activities / Enrollments / Services** tab
- Click on [Create Activity / Enrollment / Service](#)

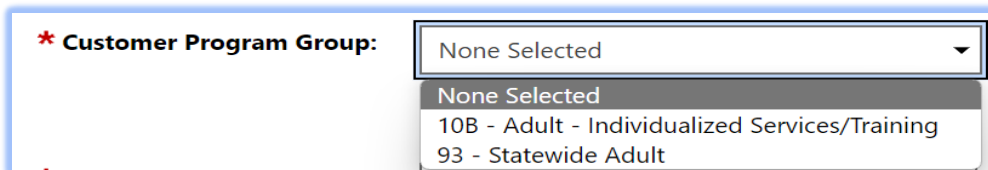
**Page Displays:**



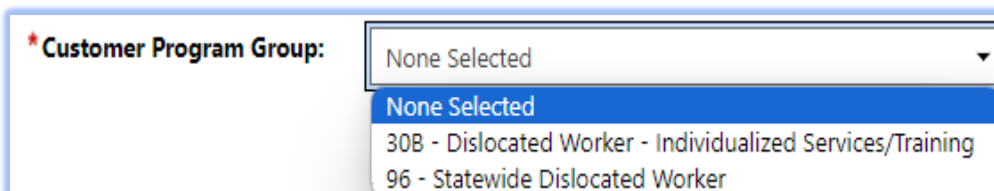
5. Select the applicable Program Group for the participant you are assisting:

Examples of **Customer Program Groups** – *(Select the applicable fund)*

- 93 - Statewide Adult**



- 96 - Statewide Dislocated Worker**



6. **LWDB** – Board area auto-populates; verify correct Board is displaying.

7. **Office Location** – Select from the dropdown your office location.

\* **LWDB:**

\* **Office Location:**

8. Select **Grant** – Add the applicable WIOA Grant Name:

- WIOA Statewide Dislocated Worker **METXDW – Metrix – WIOA DW Grant**

**Grant:**

**WIOA or Non-WIOA Partner Program:**

- None Selected
- WIOA Dislocated Worker Statewide
- METDW - Metrix - WIOA DW Grant

- WIOA Statewide Adult **METXA – Metrix – WIOA Adult Grant**

**Grant:**

**WIOA or Non-WIOA Partner Program:**

- None Selected
- WIOA Adult Statewide
- METADT - Metrix - WIOA Adult Grant

9. Select **Activity Code:** 328 - Occupational Vocational Training (Non-ITA) for Metrix Industry Certification Track Training and Assistance **or**

Status	ID #	Activity / Provider	Actions	Funding / Grant
		<a href="#">328 - Occupational/Vocational Training (Non-ITA)</a> ComputerMinds.com		Statewide Dislocated Worker METXDW - Metrix - WIOA DW Grant

Select **Activity Code:** 269 - Short-term Work Readiness Services for General Online Coursework, including job readiness courses or other online courses not intended to lead to Metrix Industry Certification

Status	ID #	Activity / Provider	Actions	Funding / Grant
		269 - Short-term Work Readiness Services No Provider Information		Statewide Adult METADT - Metrix - WIOA Adult Grant

10. Enter the following dates as the **Actual Begin Date** and **Projected End Dates**:

- **Actual Begin date:** The date the participant begins receiving Metrix Industry Certification Assistance.
- **Projected End Date:** Enter the estimated date of completion for Projected End Date (this date cannot be more that 31 days).

\* 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 :

**Recommendation:** BSS TA recommends that staff enter the projected end date as the last day of the month and for the next month’s entry staff can extend the projected end date for the end of the following month.

11. If staff select the service 328 Occupational/Vocational Training (Non-ITA), the system will add the required question below:

- Participant has been issued an ITA and the ITA will pay for this service. *Select **No**.*

\* Participant has been issued an ITA and the ITA will pay for this service:

None Selected

Yes

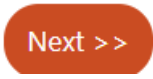
**No**

12. Add a Case Note

Case Notes:

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

ID	Create Date	Subject	Action
No data found.			

13. Click  to continue through the Activity Enrollment – General Information Tabs:

**Activity Enrollment - General Information**

Activity Enrollment - General Information  
This page displays activity information for the specified participant.

[General Information](#)
[Service Provider](#)
[Enrollment Cost](#)
[Financial Aid](#)
[Enrollment Budget](#)
[Budget Planning](#)
[Closure Information](#)

**Service Provider Tab** – this tab will auto-populate.

- *Service Provider*
  - Select Provider
  - Select Service, Course, or Contract
  - Occupational Training Code

**Activity Enrollment - Service Information**

Activity Enrollment - Service Information  
This page displays activity service and worksite information for the specified participant.

[General Information](#)
[Service Provider](#)
[Enrollment Cost](#)
[Financial Aid](#)
[Enrollment Budget](#)
[Budget Planning](#)
[Closure Information](#)

**Enrollment Cost Tab**

- *Enrollment Cost*
  - Metrix will not have any activity costs. All cost fields should be set to zero.

**Activity Enrollment - Service Costs** ? Info

Activity Enrollment - Service Costs  
This page displays activity cost information for the specified participant.

[General Information](#)
[Service Provider](#)
[Enrollment Cost](#)
[Financial Aid](#)
[Enrollment Budget](#)
[Budget Planning](#)
[Closure Information](#)

14. Closure Information Tab

- Closure Information (once training and assistance services are completed) – This is **only required for the Certification Track** training; this is not required for the General Online courses.

- Enter the final date of certification assistance (*which may be the date of certification testing*) for the Last Activity Date of the service.
- Select appropriate Completion Code.

### Closure Information ? Info

Closure Information  
This page displays activity closure information for the specified participant.

General Information	Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information
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## 15. Metrix Tracking Process After Enrollment

- After staff have determined eligibility and opened the **service 328** or **service 269** in WIT, the Boards designated Metrix Administrator will email Metrix at [certifications@metrixlearning.com](mailto:certifications@metrixlearning.com) email with the participant's name WIT ID, service number and the course they are enrolled in.
- **For the Service 328 only** – the Board's Metrix Administrator must also add the participant's information to the Board's SharePoint list PRIOR to notifying Metrix through email.
  - Board's Metrix administrator will email Metrix the customer's name and Certification training track, which will trigger Metrix staff, to reach out to BSS to confirm participant's eligibility and data entry in both WIT and the Metrix SharePoint document.
  - Once this has been verified, Metrix staff will reach out to the participant to provide them access to the Metrix courses.
- **For the Service 269 only** - The Board's Metrix administrator will email Metrix at [certifications@metrixlearning.com](mailto:certifications@metrixlearning.com) with the participant's name and indicate that they are enrolled in the General Online Courses, which will trigger Metrix staff to reach out to the participant to provide them access to the Metrix General Online courses.

**Adding Youth Metrix Statewide Initiative Services**  
**Certification Track Training and General Online Coursework**

Before Staff enter the applicable Metrix Service, please look at the **Activities / Enrollments / Services** Tab to make sure the service sequencing has been entered correctly.

**WIOA Youth Program**

- **1st Service must be:** 412 - Comprehensive Objective Assessment - Youth Funded
- **2nd Service must be:** 413 - Individual Service Strategies (ISS) - Youth Funded
- **3rd rule:** All Youth Element services become available (remaining 400-series services)
- **4th rule:** At least one Youth Element service has been entered, then the remaining services become available except for Follow-up services.

When selecting a Service Code, If Services 412 Comprehensive Objective Assessment and 413 Individual Service Strategies (ISS) show as a selection option, this means that one or both of these services **were not** entered prior to conversion.

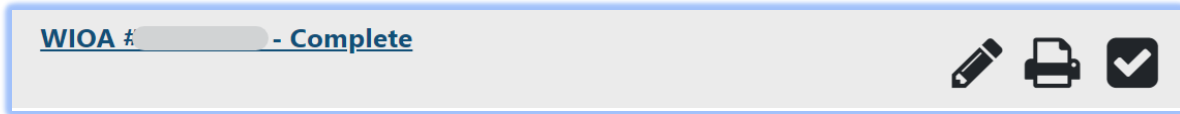
Staff will need to go back to Program Ribbon to open **Activities / Enrollments / Services** tab to verify if these services have been entered. If one or both have not been entered; the **missing services must be entered** before the system will allow any other services to be added.

**Please Note:**

- For converted records Youth that were placed in the Short-Term Work Readiness (TWIST service code 84), converted in WIT as service 460 Short-Term Work Readiness - Youth. As of 4/15/2024 staff should enter service 459, which is Short-term Educational services.
- Staff may see that the service 68 converted; **however, this will not suffice for the 413 required service; the 413 service must be entered.**



1. Case Manager must confirm that the Metrix grant has been added to the Grants section of the individual’s eligibility summary. To add the Metrix grant to the Grants section in WIT, staff must:  
**PATH** > Click the Pencil Icon from the WIOA Application in order to edit the individuals Eligibility Summary.



**Page Displays** showing WIOA Application, staff will click on **Eligibility Summary** page displays **Applicant Eligibility**

## Intro

Fill out the information below to complete this section of the application.

### Title I - Workforce Development (WIOA)

1 / 10

Progress bar with sections: **Intro**, **Contact**, **Demographic**. All sections are marked as complete with green checkmarks.

- Intro**
  - ✓ [Intro](#)
  - ✓ [Veteran](#)
  - ✓ [Public Assistance](#)
  - ✓ [Eligibility Summary](#)
- Contact**
  - ✓ [Contact](#)
  - ✓ [Employment](#)
  - ✓ [Barriers](#)
- Demographic**
  - ✓ [Demographic](#)
  - ✓ [Education](#)
  - ✓ [Household And Income](#)

Scroll to bottom of page to add the appropriate grant from the **Action**

Select from the list of available grants.

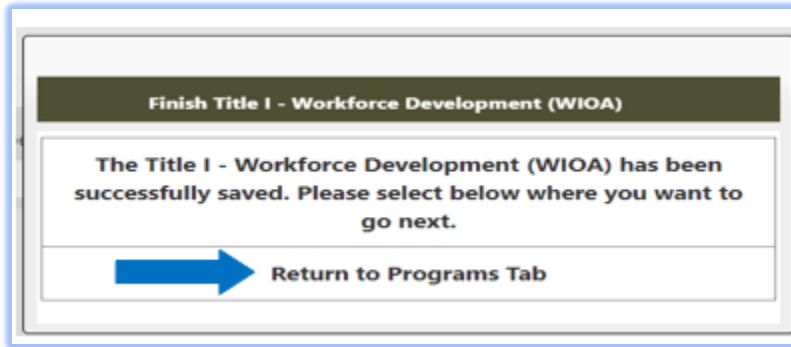
Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Statewide Youth	36	Metrix - WIOA Youth Grant	METYTH		<a href="#">Add</a>

**Column**

2. Select **Add** and click **Finish** at the bottom of the page to save changes to the individual’s WIOA grant eligibility summary.



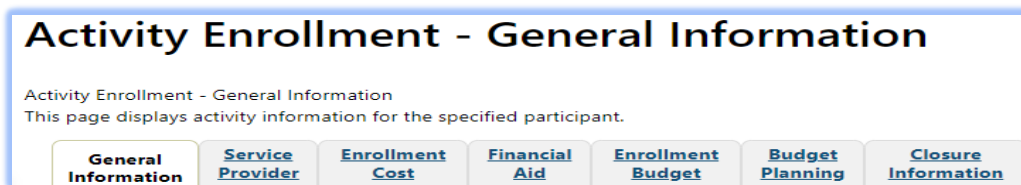
3. Click Return to Programs Tab



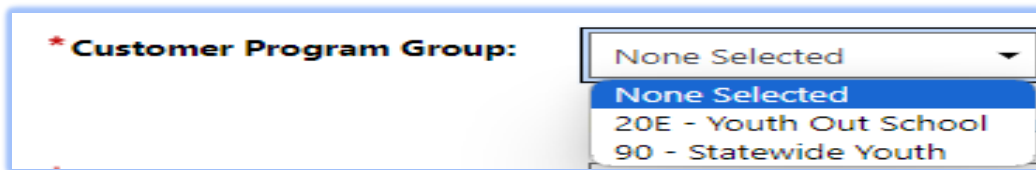
4. Assist an Individual > Staff Profiles > Case Management Profile > Programs

- **Scroll down to the WIOA Program Ribbon**
- **Click on [Activities / Enrollments / Services](#) tab**
- **Click on [Create Activity / Enrollment / Service](#)**

**Page Displays:**

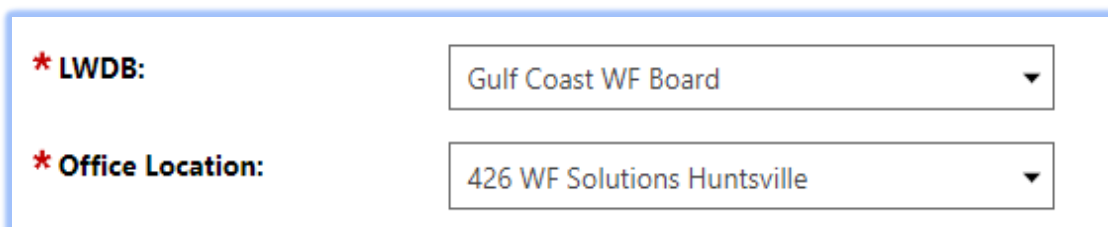


5. Select the **Statewide Youth Group** – *(Select the applicable fund)*  
 **90 - Statewide Youth**



6. **LWDB** – Board area auto-populates; verify that the correct Board is showing

7. **Office Location** – enter your office location.



8. Select Grant – Add the WIOA Youth Grant Name:

- Statewide Youth **METYTH – Metrix – WIOA YOUTH Grant**

Grant: METYTH - Metrix - WIOA Youth Grant ▼

None Selected

WIOA Youth Statewide

METYTH - Metrix - WIOA Youth Grant

9. Select **Activity Code 454** - Occupational Vocational Training (Non-ITA) - Youth Funded for Metrix Industry Certification Track Training and

Status	ID #	Activity / Provider	Actions	Funding / Grant
<span style="color: green;">O</span>	2470282	<a href="#">454 - Occupational/Vocational Training (Non-ITA) - Youth Funded Metrix Learning</a>	<span style="color: purple;">W</span>	Statewide Youth WIOA Youth Statewide

Assistance.

- Select **Activity Code 459** - Short-term Educational Services - Youth Funded for General Online Coursework, including job readiness courses or other online courses not intended to lead to Metrix Industry Certification Assistance

Status	ID #	Activity / Provider	Actions	Funding / Grant
<span style="color: green;">O</span>	4757916	<a href="#">459 - Short-term Educational Services - Youth Funded No Provider Information</a>	<span style="color: purple;">W</span>	Statewide Youth METYTH - Metrix - WIOA Youth Grant

10. Enter the following dates as the **Actual Begin Date** and **Projected End Dates**:

- Actual Begin date: The date the participant begins receiving Metrix Industry Certification Assistance
- Projected End Date: Enter the estimated date of completion for Projected End Date (this date cannot be more that 31 days).

\* 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](#)  : No Virtual/Online. In-person Only ▼

**Recommendation:** BSS TA recommend that staff enter the projected end date as the last day of the month and for the next month’s entry staff can extend the projected end date for the end of the following

month.

**11.** If staff select the service 454 Occupational/Vocational Training (Non-ITA) – Youth Funded, the system will add the required question below:

- Select **No** for the question -Participant has been issued an ITA and the ITA will pay for this service.

**\* Participant has been issued an ITA and the ITA will pay for this service:**

No

None Selected

Yes

No

**12. Add a new Case Note**

Case Notes:

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

ID	Create Date	Subject	Action
No data found.			

**13. Click Next >> to continue through the **Activity Enrollment – General Information Tabs:****

**Activity Enrollment - General Information**

Activity Enrollment - General Information  
This page displays activity information for the specified participant.

[General Information](#)
[Service Provider](#)
[Enrollment Cost](#)
[Financial Aid](#)
[Enrollment Budget](#)
[Budget Planning](#)
[Closure Information](#)

**Service Provider Tab – this tab is auto-populated.**

- ❑ *Service Provider*
  - Select Provider
  - Select Service, Course, or Contract
  - Occupational Training Code

**Activity Enrollment - Service Information**

Activity Enrollment - Service Information  
This page displays activity service and worksite information for the specified participant.

[General Information](#)
[Service Provider](#)
[Enrollment Cost](#)
[Financial Aid](#)
[Enrollment Budget](#)
[Budget Planning](#)
[Closure Information](#)

**Enrollment Cost Tab**

- ❑ *Enrollment Cost*
  - Metrix will not have any activity costs. All cost fields should be set to zero.

**Activity Enrollment - Service Costs** Info

Activity Enrollment - Service Costs  
This page displays activity cost information for the specified participant.

General Information Service Provider Enrollment Cost Financial Aid Enrollment Budget Budget Planning Closure Information

## Closure Information Tab

- Closure Information (once training and assistance services are completed) - This is **only required for the Certification Track** training; this is not required for the General Online courses.
  - Enter the final date of certification assistance (*which may be the date of certification testing*) for the Last Activity Date of the service.
  - Select appropriate Completion Code.

**Closure Information** Info

Closure Information  
This page displays activity closure information for the specified participant.

General Information Service Provider Enrollment Cost Financial Aid Enrollment Budget Budget Planning Closure Information

14. The **Closure Tab** will display. If staff are not closing the service, staff will select [Exit Wizard](#)

## 15. Metrix Tracking Process After Enrollment

- After staff have determined eligibility and opened the service 328 **or** service 269 in WIT, the Board's designated Metrix Administrator will email Metrix at [certifications@metrixlearning.com](mailto:certifications@metrixlearning.com) with the participant's name WIT ID, service # and training name.
- For the Service 328 only – the Board's Metrix Administrator must add the participant's information to the Board's SharePoint list prior to notifying Metrix through email.
- Metrix will receive the Board Metrix Administrator's email, which will trigger Metrix to reach out to BSS to confirm all data entry in WIT and SharePoint.
- Once this has been verified, Metrix will reach out to the participant to begin their Metrix training courses.