

WorkinTexas.com Workforce Innovation and Opportunity Act (WIOA) Case Management Exercise Workbook

Approved by the

Texas Workforce Commission

Training and Development Department



Training and Development Mission

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

Texas Workforce Commission

Training and Development Department

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Equal Opportunity Employer/Program

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WIOA Program: Case Management Training

This manual contains the exercises for the WorkinTexas.com (WIT) WIOA Case Management training class.

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

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

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

Guidance for Using This Workbook

In the exercises:

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

Staff Functions

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

Exercise #1: Login as Staff



Objective: Login as Staff.

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

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

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

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

Exercise #2: Pin Links on My Staff Dashboard



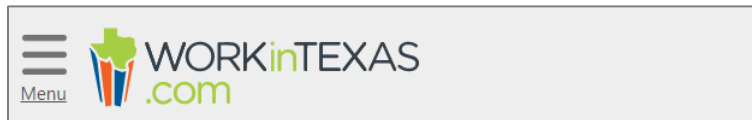
Objective: Create shortcuts to popular staff commands.

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

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

To set the Create Individual pinned link:

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



Tribar / Menu Link

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

To set the Assist an Individual pinned link:

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

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

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

Exercise #3: Configure Dashboard Widgets Display



Objective: Set a preferred display for your dashboard widgets.

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

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

To configure the display of your dashboard widgets:

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

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

Exercise #4: Configure Dashboard Widgets

Location



Objective: Set a preferred location for your dashboard widgets.

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

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

To configure the location of your dashboard widgets:

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

Exercise #5: Set Preferences within My Staff Account



Objective: Establish desired settings to control system behavior.

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

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

To set preferences within My Staff Account:

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

iv. Case Management – **Plan Tab.**

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

Symmary Landing Page Options

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

Exercise #6: Perform Individual System Registration



Objective: Create a fictitious individual for the purpose of WIOA case management training.

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

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

To create an individual account:

1. Select **Create an Individual** from the left navigation menu under the **Services for Workforce Staff > Manage Individuals** menu.
2. In the Login Information section, enter a fictitious individual's username. **Make up this information** according to the business rules displayed in blue text and write down the information for future use.
3. Enter password, **Trainingpassword@1**.
4. Choose a security question and enter **123** as the response.

Login Information ?

* User Name:

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

* Password: 👁

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

* Confirm Password: 👁

* Security Question: ▼

* Security Question Response: 👁

Special characters are not allowed.

Login Information Section of Create Individual Account Process

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

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

Name Section of Create Individual Account Process

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

Social Security Number	
<input type="checkbox"/>	I do not wish to provide my Social Security Number
Do not enter dashes (for example, 9990011111)	
Social Security Number (SSN):
Re-enter Social Security Number:

Social Security Number Section

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

The screenshot shows a form titled "E-mail Address". It contains a text input field labeled "Primary E-mail:". Below this field are two hyperlinks: "Create E-mail Account" and "Read Our E-mail Security Policy". At the bottom of the form is another text input field labeled "Confirm Primary E-mail Address:".

Email Address Section of Create Individual Account

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

The screenshot shows a form titled "Primary Location Information". It contains a dropdown menu labeled "* Country:" with "United States" selected. Below this is a radio button question: "* Are you authorized to work in the United States?" with "Yes" selected and "No" unselected.


Primary Location Information Section

10. In the Residential Address section, select whether the individual is homeless, **No**.
11. Enter their address details accordingly **make one up using local fictitious information**.
12. In the Demographic Information section, enter the individual's date of birth **05/15/2003** (for the exercise, make sure the client is 20 years old).

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

14. Select **No** for the 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.

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

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

17. In the Education Information section, select the individual's highest education achievement level, **10th Grade Completed** and their current school status, **no, not attending any school**.

Education Information
<p>* Your Highest Education Level Achieved:</p> <p>10th Grade Completed ▼</p>
<p>* Are you attending school?</p> <p>No, Not Attending Any School ▼</p>

Education Information Section of Create Individual Account Process

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

Spouse or Caregiver of a U.S. Military Member
<p>Spouse or family caregiver of a Military member or Veteran may be entitled to State and Federal benefits. Please answer the following questions.</p>
<p>* Are you the Spouse or Caregiver of an active U.S. Military member or a Veteran?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>

Spouse or Caregiver of a Military Member Section

Military Service

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

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

Yes

No

Military Service Section of Create Individual Account Process

19. In the Military Service section, select **No**.
20. In the Job Title section, enter the individuals preferred job title **Delivery Driver**. As you type, suggested matches will display, from which you may select the title **Delivery Driver**.

Job Title

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

* Job Title

delivery

- Delivery Clerk
- Delivery Courier
- Delivery Crew Member
- Delivery Crew Worker
- Delivery Department Supervisor
- Delivery Dispatcher
- Delivery Driver**
- Delivery Man
- Delivery Manager

Job Occupation

Please select the occupation that best describes the job. The list of occupations is populated based on the job title above.

select from the list using the dropdown arrow

Job Title Section of Create Individual Account Process

21. In the Job Occupation section, select **Driver/Sales Workers**.

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):

Driver/Sales Workers

[[Search for an occupation](#)]

* Occupation Title: **Driver/Sales Workers**

* Occupation Code: **53303100**

Job Occupation Section of Create Individual Account Process

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

22. In the Ethnic Origin section, select whether the individual is of Hispanic or Latino heritage (**your choice**).
23. In the Race section, select all races that apply (**your choice**)

Race

* Race - Please check all that apply:

- African American/Black
- American Indian/Alaskan Native
- Asian
- Hawaiian/Other Pacific Islander
- White
- I do not wish to answer.

Race Section of Create Individual Account Process

24. In the Language section, provide a response.

Language

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

Yes
 No

Language Section

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

What's Next?



[Add information to better match job requirements](#)

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



[Create a résumé](#)

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



[Apply for Career Services and Training](#)

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



[Additional Veteran Services](#)

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

Sample Registration Confirmation Page

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

Exercise #7: Complete WIOA Program Application



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

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

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

To complete the WIOA program application:

1. Continue to assist the individual you created.
2. Click their name hyperlink next to Currently Managing displayed top center of the screen.
3. In the folder tree area at the top of the page, click **Staff Profiles >Case Management Profile >Programs**.
4. Scroll down to the Workforce Investment Opportunity Act (WIOA) section and click the **Create Title I – Workforce Development (WIOA) Application** link. The application wizard launches.



Launch the WIOA Application Wizard


Intro Page


Workforce Innovation and Opportunity Act (WIOA)


Application is Closed Never Enrolled


Case Application ID: 160347940


WIA Converted Application ID: Not Applicable

* Application Date:  [Today](#)

Adult Eligibility Date:  [Today](#)

Dislocated Worker Eligibility Date:  [Today](#)

Youth Eligibility Date:  [Today](#)

Incumbent Worker Eligibility Date:  [Today](#)

WIOA Application Wizard-Intro Page

To complete the Intro page:

1. Select the **Today** link for each of the following fields:
 - i. Application Date
 - ii. Adult Eligibility Date
 - iii. Dislocated Worker Eligibility Date
 - iv. Youth Eligibility Date
2. Confirm the LWDB, Office Location, and Office Location of Responsibility default selections are correct. Adjust the selections if needed.
3. Click the **Next** button to save the data and proceed to the Contact page.

Contact Page

Contact Information

* First Name:

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 verification documents displays.
 - ii. Select **Social Security Card** and click **Verify** again to hide the list.

- iii. (Optional) Select the **Upload** link to practice uploading a sample document following the instructor's directions.
3. Verify the application address.
 - i. Click the **Verify** link for Address Verify. A list of verification documents displays.
 - ii. Select **Driver's License** and click **Verify** again to hide the list.
 - iii. (Optional) Select the **Upload** link to practice uploading a sample document following the instructor's directions.
4. Select Primary Phone Type, **Cell/Mobile Phone**.
5. (Optional) Select the **Add New Contact** link to create record(s) for contact persons known to the applicant. Minimally, make up information for Contact Name, Phone Number, and Relationship fields.
6. Click **Save**.
7. Click the **Next** button to save the data and advance to the Demographic page.

Demographic Page

Demographic Information

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

*** 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 verification documents displays.
 - ii. Select **Driver’s License** and click **Verify** again to hide the list.
 - iii. (Optional) Select the **Link** hyperlink to practice using a previous document to verify the date of birth.
2. Confirm **Gender**, as appropriate.
3. For U.S. Citizenship Status, select/confirm **Citizen of U.S. Territory**.
4. Verify the U.S. Citizenship Status.

- i. Click the **Verify** link to verify. A list of verification documents displays.
- ii. Select from List B - **Voter Registration Card** and from List C - **Birth Certificate** and click **Verify** again to hide the list.

Note: Staff must select a verification document from two different lists.

5. For Selective Service registration:

- i. (Optional) Select the **Selective Service Website** link if the applicant is male to see site contents and confirm prior registration.
- ii. Select **Yes** for Selective Service Registration if the applicant is male. If the applicant is female, maintain the Not Applicable status displayed.
- iii. Select the **Verify** link and choose **Internet** www.sss.gov if the applicant is male.
- iv. Enter **12345** for Selective Service Registration Number if the applicant is male.

6. Confirm responses exist for Hispanic/Latino Heritage, Race, and Considered to have a disability.

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

Veteran Page

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

WIOA Application Wizard – Veteran Page

To complete the Veteran page:

1. Confirm all responses, **No**.
2. Click the **Next** button to save the data and advance to the next page.

Employment Page

Employment Information

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

* **Employment Status:**

Unemployed

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

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

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

* **If Employed, Individual is Under-Employed:** Yes No Not Applicable

In a Registered Apprenticeship Program? Yes No Did Not Disclose

* **UC Eligibility Status:** Neither Claimant nor Exhaustee

WIOA Application Wizard – Employment Page

To complete the Employment page:

1. Select **Unemployed** for Employment Status.
2. Verify the employment status.
 - i. Click the **Verify** link to verify. A list of verification documents displays.

- ii. Select **Employer Contact** and click **Verify** again to hide the list.
3. Select **No** for Not in the labor force.
4. Select **No** for Never worked and actively looking for work.
5. Select **Neither Claimant nor Exhaustee** for UC Eligibility Status.
6. Select **Yes** for Attended a Rapid Response Orientation.
7. Select **Today** for Most Recent Date Attended RR Service.
8. Select the **Find RR Event** link.
9. Select the **Search** button.
10. Select the link for Event Number **9999999999**.
11. Select **No** for Long Term unemployed.
12. Select **Yes** for Unemployed due to layoff or termination.

Individual Employment History Section

1. Select the **Add Employment History** link.
2. Enter **Tuesday Morning** in the Employer Name field.
 - i. If the system displays related employers, select any match that displays.
 - ii. If the system fails to display related employers, enter a ZIP Code, city, and state.
3. Enter **Delivery Driver** as the Job Title and select the match that displays.

4. Select **Driver/Sales Workers** from the Suggested occupation(s): list box.
5. Enter **Regular** for Type of employment.
6. Enter **Full Time (30 hours or more)** in the Full or part-time field.
7. Enter **11/08/2022** in the Date you began work field.
8. Select **Layoff** for Reason for Separation.
9. Select **Today** for Last Day Worked.

Note: The system will calculate the job duration upon saving the employment record.

10. Select the **Insert Occupation Description** link to identify job duties; choose the **Summary Description** radio button.
11. Click **Submit** to save the description.
12. Select **Save** to return to the Employment Page of the WIOA program application.
13. Select **OK** for each prompt displayed to update the client's background information.

Dislocated Worker Section

1. Maintain/Select **Unemployed** for Employment Status at Dislocated Worker Eligibility.
2. Select **Category 3** for Dislocated Worker Category.
3. Verify the category.

- i. Click the **Verify** link to verify. A list of verification documents displays.
 - ii. Select **Category 3 Warn Notice**.
4. Select **Today** for Actual Layoff Date.
5. Select the **Search Individual Employment History** link.
6. Select **Show All** in the Filter box.
7. Choose the **Select** link for the Tuesday Morning employer.
8. Select **OK** to accept the prompt displayed.
9. Click the **Next** button to proceed.

Education Information Page

Youth Education Information

Youth Eligibility Date: 06/23/2023

Age for compulsory school attendance: 18

Most Recent Date Attended Secondary School:

Within compulsory school age and did not attend the most recent complete school year calendar quarter (use most recent date attended secondary school): Yes No

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

* Has secondary school diploma/equivalent at Youth Program Eligibility: Yes No

WIOA Application Wizard - Education Information Page

To complete the Education page:

1. Select **No** for Has Secondary School Diploma/equivalent at Youth Program Eligibility.
2. Select **Not attending school or secondary school dropout** for School Status at Youth Program Eligibility.
3. Verify the school status.
 - i. Click the **Verify** link to verify. A list of verification documents displays.
 - ii. Select **School records**.

Education Information Section

1. Select/maintain **10th Grade Completed** for the Highest school grade completed by the individual.
2. Select **No** for High School diploma or equivalent.
3. Select/maintain **No Educational Level Completed**.
4. Verify the Highest education level.
 - i. Click the **Verify** link to verify. A list of verification documents displays.
 - ii. Select **Self-Attestation**.
5. For School Status, maintain **Not attending school or secondary school dropout**.
6. Verify the Highest education level.
 - i. Click the **Verify** link to verify. A list of verification documents displays.
 - ii. Select/maintain **School Records**.

Education Partner Services Section

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

Public Assistance Page

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

Individual Barriers Page

Individual Barriers

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

* English Language Learner: Yes No

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. Select **No** for English Language Learner.
2. Select **Yes** for Basic Skills Deficient.
3. Verify Basic Skills Deficiency.
 - i. Click the **Verify** link to verify. A list of verification documents displays.
 - ii. Select **Copy of any generally accepted standardized test.**

4. Select/maintain **No** responses for the remaining items in this section.

Barriers to Employment Section

1. Select/maintain **No** responses for the remaining items in this section.
2. Click the **Next** button to save the data and advance to the Household and Income page.

Income Information Page

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

To complete the Income page:

1. Enter **4** for Family Size.
2. Verify Family Size.
 - i. Click the **Verify** link to verify. A list of verification documents displays.
 - ii. Select **Lease**.
3. Enter **\$23,000.00** for Annualized Family Income.
4. Verify Income.
 - i. Click the **Verify** link to verify. A list of verification documents displays.
 - ii. Select **Pay Stubs**.

5. Select the **Next** button to save the data and advance to the Miscellaneous page.

Eligibility Summary Page

Workforce Innovation and Opportunity Act (WIOA) Eligibility Information

Applicant Eligibility ?

Applicant meets the definition for low income: Yes

Income Table: [Income Table](#)

Youth applicant meets low income based upon living in a high poverty area or free/reduced school lunch: no

Program	Eligible	Priority	Calculated Exception/Limitation	Reason(s) Not Eligible	Action
Adult	Yes	BSD, LI			<input type="checkbox"/> Inactive
Dislocated Worker	Yes-12				<input type="checkbox"/> Inactive
Youth	Yes, Out-of-school -12				<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

To complete the Eligibility Summary page – WIOA Grant Eligibility:

1. Set the customer’s eligibility for WIOA and non-WIOA grants by performing the following steps:
 - i. Under the WIOA Grant Eligibility heading, select **Yes** for the Statewide Adult Eligibility option.
 - ii. In the table of available grants displayed down the page, select **Add** for the Statewide Adult grant type.

- iii. Under the Non-WIOA Grants heading, select **Yes** for Non-WIOA Special Grants.
 - iv. In the table of available grants displayed down the page, select **Add** for the Non-WIOA Special Grant grant type.
2. For Current Case Manager, the system will automatically assign you as the case manager.
 - i. (Optional) If the system fails to assign you as the case manager, select **Assign Case Manager**, select **Assign to this group**, and select a desired **username** link.
3. (Optional) In the Remote Signature section, select the **Capture Signature** link for the applicant.
4. Select the **Manual** option.
5. Draw the applicant's signature with your mouse.
6. (Optional) In the Remote Signature section, select the **Capture Signature** link for the staff user.
 - i. If you already created one using My Staff Account, select the **Click this link to use your saved signature image** hyperlink.
 - ii. If you did not capture your staff signature previously, select the **Capture Signature** link, select **Manual**, and draw your signature using your mouse.
7. Select the **Finish** button.
8. When prompted, select **Return** to Programs tab.

Exercise #8: Complete WIOA Participation Form




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

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

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

To complete the WIOA Participation form:

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.
3. Enter the Participation Date by selecting the **Today** link.
4. Select **Next** to save the data entry and proceed to the Create Activity Enrollment screen. (Continue to Exercise#9, General Information Tab.)

Exercise #9: Create WIOA Service/Enrollment Record 1




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

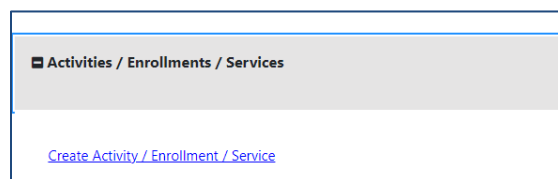
Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and completed the WIOA Participation form.

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

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

To complete 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

General Information Tab

1. In the General Information area, select the desired Customer Program Group, **10B -Adult Individualized Services / Training**.
2. Select/confirm the staff member LWDB region.
3. Select/confirm the staff member Office Location.
4. Click the **Select Activity Code** link and choose **203 – Comprehensive Objective Assessment** from the list displayed.
5. Maintain the Actual Start Date, which is the WIOA Participation date.
6. Select the **Today** link to enter the Projected End Date.
7. Click **Next** to save the data and proceed to the next tab.

Service Provider Tab

1. Click on the **Select Provider** link and select **Sample Office Services Provider** from the Provider list box.
2. Click on the **Select Service, Course or Contract** link and select **203 – Comprehensive Objective Assessment** from the Service, Course, or Contract list box.
3. Click **Next** to save the data and proceed to the next tab.

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #10: Create an Objective Assessment Summary (OAS) Form



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

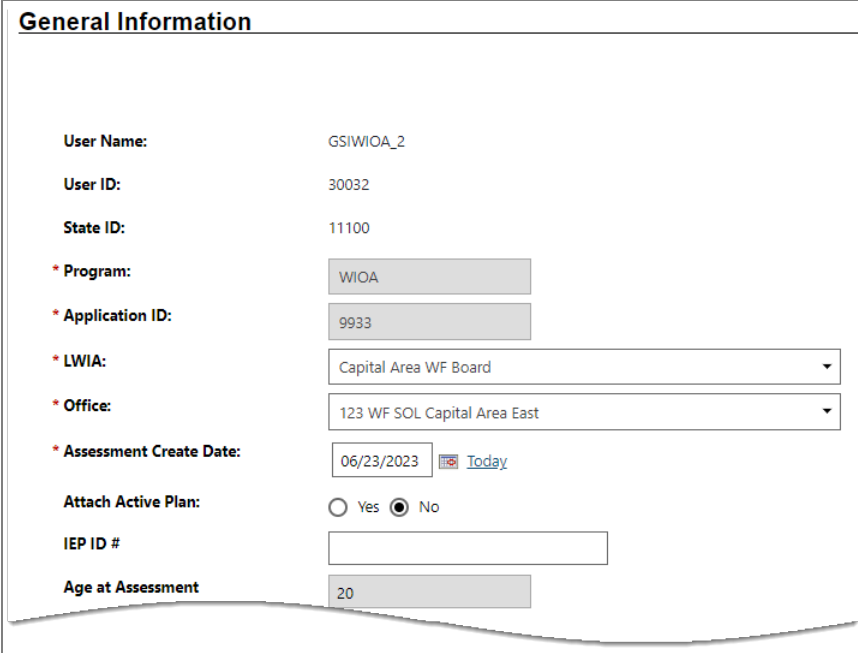
Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the individual you are managing is a WIOA program participant.

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

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

To create an Objective Assessment Summary (OAS):

1. From the Staff Profiles menu, select the **Plan** link.
2. On the **Plan** tab of the Objective Assessment Summary, click the **Create Objective Assessment Summary** button. The General page displays (see figure below).



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

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

Expectation

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

1. In the Program Expectations section:
 - i. Indicate whether the individual seeks immediate employment, **yes**.
 - ii. Record desired services in the text box, for example, **Education Assistance and Employment Assistance**.
2. In the Employment Expectations section:
 - i. Maintain as **Occupation 1** the system-set **Driver/Sales Workers** title.
 - ii. For Occupation 2, click the **Select Occupation** link.
 - iii. Enter **Home Health Aide** in the Keyword Search field.
 - iv. From the match results, select **Home Health Aides**.

- v. Specify desired job attributes, such as employment type **Regular**, full or part time **Full Time 30 Hours or More**, desired salary **\$12.00 hourly**, shift preferences (**1st**), benefits needed **Health Insurance**, etc.
 - vi. Select **Yes** for Desires Help in Career Planning.
 - vii. Select **Yes** for Seeking Training Services.
 - viii. In the Training Preferences box, enter **GED training** and **occupational skills training**.
3. Click **Next** to save your edits and continue to the Education page (see figure below).

Education

Education History

Highest Grade Completed

Currently Enrolled in 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

1. In the Education History section:
 - i. Select **10th Grade Completed** for Highest Grade Completed.
 - ii. Select **No, Not Attending School** for Currently Enrolled in School.
 - i. In the Education History Assessment Summary box, enter **High school dropout** and **Basic skills deficient**.

2. In the Basic Skills/Education Factors section, select the following check boxes:
 - i. **High School Dropout**
 - ii. **Basic Skills Deficient**

iii. **Reading Below 9th Grade**

3. In the Basic Skills / Education Factors Assessment Summary box, enter **Client requires GED training to increase job opportunities and earnings.**
4. Click **Next** to save your edits and continue to the Degree page.

Degree

The screenshot shows a table titled "Degrees" with a header row containing four columns: "Degree", "Issuing Institution", "Completion Date", and "Action". Below the table is a link that says "[Add a New Degree]". A question mark icon is visible in the top right corner of the table area.

Objective Assessment Wizard – Education Page Degrees

1. Click **Next** to continue to the Certificate page.

Certificates

The screenshot shows a table titled "Certificates" with a header row containing four columns: "Certificate License", "Organization", "Completion Date", and "Action". Below the table is a link that says "[Add a New Certificate]". A question mark icon is visible in the top right corner of the table area.

Objective Assessment Wizard – Education Page

1. Click **Next** to continue to the Employment page.

Employment

Occupational Transferable Skills

Summary of Skill Assessment

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

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

1. In the Occupation Transferrable Skills section, in the **Summary of Skill Assessment** box, enter the following:
 - i. Operate personal and/or company vehicle.
 - ii. Manage daily itinerary.
 - iii. Read and interpret customer information.
 - iv. Navigate local roads and highways.
 - v. Utilize time management skills.
 - vi. Utilize communication skills.

2. In the Employment History section, maintain the employer record for Tuesday Morning.
3. Click **Next** to save your edits and continue to the Household & Income page (see figure below).

Household & Income

Household & Income

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

Name	Relationship	Age	Income Source	Annualized Income	Action
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

1. Select the **Add a New Household Member** link.
2. Enter/select the following information:
 - i. Enter the first and last name for the WIOA participant.
 - ii. Enter **20** for the person’s age.
 - iii. Select **Self** from the Relationship field.
 - iv. Select **No** for Dependent.
 - v. Select **Individual** for Custody.
 - vi. Select **No Income** for Income Source.
 - vii. Enter **\$0.00** for Income Amount.
 - viii. Select **Save**.

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

4. Enter/select the following information:

- i. Make up a first and last name.
- ii. Enter **51** for the person's age.
- iii. Select **Parent** from the Relationship field.
- iv. Select **No** for Dependent.
- v. Select **Head of Household** for Custody.
- vi. Select **Employment** for Income Source.
- vii. Enter **\$23,000.00** for Income Amount.
- viii. Select **Annually** for Frequency.
- ix. Enter **\$23,000.00** for Annual Amount.
- x. Select **Save**.

5. In the Household & Income Summary text box, enter **Family qualifies as low income**.

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

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

1. In the Work Readiness section, select the following checkboxes:
 - i. **Dependent Care Needs.**
 - 1) **Not at this time.**
 - ii. **Transportation.**
 - 2) **Has a Valid License.**
 - 3) **Private Vehicle Class.**
 - 4) **Lacks Automobile Insurance.**
 - 5) **Cannot Afford Gasoline.**

iii. Contacts.

1) Telephone in Home.

2. In the Work Readiness Summary box, enter **Client cannot perform delivery driver activities unless the vehicle required is company-provided.**

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

i. Interviewing Skills.

1) Negative Attitude.

ii. Resume.

1) Does not Have Resume.

iii. Application Completion.

1) Difficulty Summarizing Skills / Work History.

iv. Needs to Learn how to use Labor Market Information.

4. In the Workplace Behavior Assessment Summary box, enter **Client expresses apprehension and reluctance to change negative attributes and invest in future growth.**

5. Click **Next** to save your edits and continue to the Barriers page.

Barriers

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

1. In the Health & Behavioral Observations section, select the following checkboxes:
 - i. **Health.**
 - 1) **Lacks Medical Insurance Coverage.**
 - ii. **Behavior.**
 - 1) **Demonstrates Low Self-Esteem.**

2. In the Health & Behavior Observations Assessment Summary box, enter the following:
 - i. **Client does not have personal medical insurance.**
 - ii. **Client has difficulty making a positive, strong first impression.**

3. In the Living Environment section, select the following check boxes:

i. Home Life.

1) Lacks Family Support System.

4. In the Living Environment Assessment Summary box, enter the following:

i. Client shares cramped apartment with her mother and two younger siblings.

ii. Mother considered low income and sometimes misses rent payments.

iii. Mother works two jobs and therefore offers little support for the client.

5. In the Economic Factors / Financial Situation section, select the following check boxes:

i. Credit/Financial.

1) Needs Money Management Services.

6. In the Economic Factors/Financial Situation Assessment box, enter **Client has no money management experience.**

7. In the Barriers to Employment section, select the following check boxes:

i. Lacks Significant Work History.

ii. Sporadic or Limited Work History.

iii. Restricted Commuting Distance.

8. In the Access Assessment section, in the Employment Barriers Assessment Summary box, enter **Client exhibits poor reading comprehension skills.**
9. Click **Next** to save your edits and continue to the Criminal Background page.

Criminal Background

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:	<input checked="" type="checkbox"/> No arrest record
	<input type="checkbox"/> Arrest Record
	<input type="checkbox"/> Pending Court Case
Conviction:	<input type="checkbox"/> Convicted (adult)
	<input type="checkbox"/> Adjudicated (juvenile)
Current status of arrest:	<input checked="" type="checkbox"/> None
	<input type="checkbox"/> Formerly incarcerated (not on parole)
	<input type="checkbox"/> On probation
	<input type="checkbox"/> On parole (adult)/aftercare

Objective Assessment Wizard – Criminal Background Page

1. In the Criminal Background section, select the following check boxes:
 - i. **Arrest**
 - 1) **No arrest record.**
 - ii. **Current status of arrest**
 - 1) **None.**
2. Click **Next** to save your edits and continue to the Tests page.

Tests

Tests

[Basic Skills Assessment](#)

[Other Testing](#)

Aptitude

Career Interest

Testing Results Comments:

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

Client is basic skills deficient in reading comprehension

Objective Assessment Wizard – Tests Page and Assessments Tab

1. Click the **Basic Skills Assessment** link to view the client's assessment results (if recorded).
2. Click **Close this Window**.
3. In the Testing Results Comments: box, enter **Client is basic skills deficient in reading comprehension**.
4. Click **Next** to save your edits and continue to the Referrals page.

Referrals

Referrals		
Agency Name	Result	Action
[Add a New Referral]		

Objective Assessment Wizard – Referrals Page

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

Exercise #11: Create an Individual Employment Plan (IEP)



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

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

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

To create an IEP for the assisted individual:

1. From the Staff Profile menu, select the **Plan** link.
2. Click the **Create Individual Employment Plan/Service Strategy** button.
3. In the Plan Information section:
 - i. Select the **Today** link to enter the Plan Start Date.
 - ii. Select/maintain your LWDB/Region.
 - iii. Select/maintain the office location for the plan start.
 - iv. Click **Next** to save your data entry.

Plan Information	
* Plan Start Date	06/23/2023 (mm/dd/yyyy) Today
* LWDB/Region	Capital Area WF Board
* Plan started in office location	123 WF SOL Capital Area East
Plan closed on	<input type="text"/> (mm/dd/yyyy) Today

Create IEP - Plan Tab

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

1. To add a goal for the plan, click the **Add New Goal** link. The Add New Goal page displays.

Goal Information	
* LWDB/Region	Capital Area WF Board
* Office	123 WF SOL Capital Area East
* Program Affiliation	<input checked="" type="checkbox"/> Title I - Workforce Development (WIOA)
* Type of Goal	Education
* Term of Goal	Long Term
* Description of Goal	Attend GED training courses
* Date Established	06/23/2023 (mm/dd/yyyy) Today

Create IEP – Add New Goal Page

2. In the Goal Information section:
 - i. Select/maintain the LWDB/Region and Office.

- ii. Select the **WIOA** program affiliation.
- iii. Select **Education** for Type of Goal.
- iv. Select **Intermediate Term** for the Term of Goal.
- v. Enter **Achieve High School Diploma** for Description of Goal.
- vi. Select the **Today** link to enter the Date Established.
- vii. Enter a date 6 months from today as the Estimated Completion Date.
- viii. Enter **The client will be referred to Adult Education and Literacy.** in the Goal Details text box.
- ix. Click **Save**.

To add a second goal:

1. Click **Add New Goal**.
2. Select/maintain the LWDB/Region and Office.
3. Select the **WIOA** program affiliation.
4. Select **Training** for Type of Goal.
5. Select **Intermediate** Term for the Term of Goal.
6. Enter **Train to become a home health aide** for Description of Goal.
7. Select the **Today** link to enter the Date Established.
8. Enter **06/01/2024** as the Estimated Completion Date.
9. (Optional) Enter comments.

10. Click **Save**.
11. Click **Next** to proceed to the Objectives tab screen.

To add a new objective to the IEP:

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

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

- * Goal:** Achieve High School Diploma (dropdown menu)
- Goal Date Established:** 10/5/2023 (text input)
- * LWDB/Region:** Capital Area WF Board (dropdown menu)
- * Office Location:** 123 WF SOL Capital Area East (dropdown menu)
- * Program Affiliation:** Title I - Workforce Development (WIOA) (dropdown menu)
- * Objective:** Research where to take the GED (text input)
- * Date Established:** 10/05/2023 (text input) with a "(mm/dd/yyyy)" format hint and a "Today" link.
- * Review Date:** 10/19/2023 (text input) with a "(mm/dd/yyyy)" format hint and a "Today" link.
- Actual Completion Date:** (empty text input) with a "(mm/dd/yyyy)" format hint and a "Today" link.

Create IEP – Add New Objective Page (Manual Entry)

2. Under Goal, select **Achieve High School Diploma**.
3. Select/maintain the LWDB/Region, Office Location, and Program Affiliation.
4. Enter **Research where to take the GED course** for the Objective.
5. Select the **Today** link to enter the Date Established.
6. Enter a review date two weeks from today.

7. Enter **The client will use the WIT system to research training providers that offer GED training** in the Objective Details text box.
8. Click **Save**. The Objectives tab redisplay with the added objective along with links to Edit or Delete.

To add a pre-defined objective to the IEP:

1. On the Objectives tab, click the **Select pre-defined objectives** link.
2. Select the Goal for **Achieve High School Diploma**.
3. Select the LWDB/Region and Office Location.
4. Select the Program Affiliation (**WIOA**). The page will refresh with the list of pre-defined objectives for the program.

Objective Information

* **Goal**

* **LWDB/Region**

* **Office Location**

* **Program Affiliation**

	Pre-defined Objectives	Date Established	Review Date
<input type="checkbox"/>	Employment - Attend Job Fair	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today
<input type="checkbox"/>	Employment - Complete Company Applications	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today
<input type="checkbox"/>	Employment - Complete State of Texas Application	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today
<input type="checkbox"/>	Employment - Internships	<input type="text"/> (mm/dd/yyyy) Today	<input type="text"/> (mm/dd/yyyy) Today

Create IEP – Select Pre-Defined Objective Page

- Click the **Education – Attend GED Prep Classes** checkbox in the left column.
- Select the **Today** link for that objective to enter the Date Established.
- Click inside the Review Date field to set the default **45 days after Established Date** value.
- Click **Save**. The Objectives tab redisplay with the added objective, along with links to Edit or Delete.

To add pre-defined objective #2 to the IEP:

1. On the Objectives tab, click the **Select pre-defined objectives** link.
2. Select the Goal for **Achieve High School Diploma**.
3. Select the LWDB/Region and Office Location.
4. Select the Program Affiliation (**WIOA**). The page will refresh with the list of pre-defined objectives for the program.
5. Click the **Education – Take GED Exam** checkbox in the left column.
6. Select the **Today** link for that objective to enter the Date Established.
7. Enter **05/30/2024** for the Review Date.
8. Click **Save**. The Objectives tab redisplay with the added objective, along with links to Edit or Delete.

To add pre-defined objective #3 to the IEP:

1. On the Objectives tab, click the **Select pre-defined objectives** link.
2. Select the Goal for **Train to become a home health aide**.
3. Select the LWDB/Region and Office Location.
4. Select the Program Affiliation (**WIOA**). The page will refresh with the list of pre-defined objectives for the program.
5. Click the **Training – Occupational Skills Training** checkbox in the left column.

6. Select the **Today** link for that objective to enter the Date Established.
7. Enter **06/01/2024** for the Review Date.
8. Click **Save**. The Objectives tab redisplay with the added objective, along with links to Edit or Delete.
9. Click **Next** to proceed to the Services tab to review.

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

Sample Create IEP – Services Tab

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

Individual Employment Plan/Service Strategy							
#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
1260	Capital Area WF Board	123 WF SOL Capital Area East	OPEN	1	Marks, John	06/23/2023	Edit Delete Display/Print

Completed IEP

Exercise #12: Create WIOA Service/Enrollment Record 2




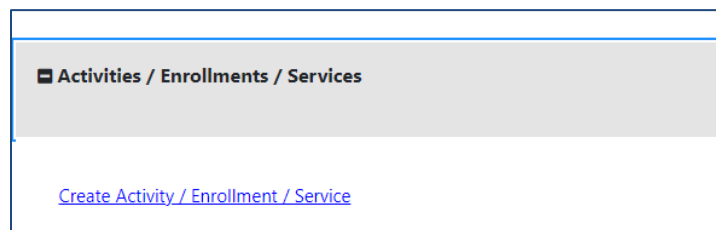
Objective: Perform data entry to record the delivery of a WIOA program service.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and created at least one WIOA program service.

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

To complete a WIOA service enrollment record:

1. From the Staff Profiles menu, select the **Programs** link.
2. 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 ribbon.
3. Click on it to expand it, then click the **Create Activity / Enrollment / Service** link.



Create Activity / Enrollment / Service Link

General Information Tab

1. In the General Information area, select the desired Customer Program Group, **10B -Adult Individualized Services / Training**.
2. Select/confirm the staff member LWDB region.
3. Select/confirm the staff member Office Location.
4. Click the **Select Activity Code** link and choose **205 – Individual Employment Plan (IEP/EDP)**.
5. Select the **Today** link to enter the Actual Begin Date.
6. Select the **Today** link to enter the Projected End Date.
7. Click **Next** to save the data and proceed to the next tab.

Service Provider Tab

1. Click on the **Select Provider** link and select **Sample Office Services Provider** from the Provider list box.
2. Click on the **Select Service, Course or Contract** link and select **205 – Individual Employment Plan (IEP/EDP)** from the Service, Course, or Contract list box.
3. Click **Next** to save the data and proceed to the next tab.

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #13: Create WIOA Service/Enrollment Record 3




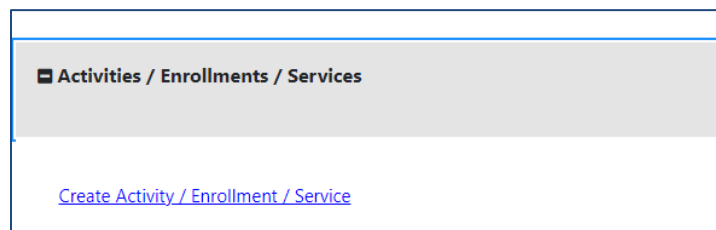
Objective: Perform data entry to record the delivery of a WIOA program service.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and created at least one WIOA program service.

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

To complete a WIOA service enrollment record:

1. From the Staff Profiles menu, select the **Programs** link.
2. 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.
3. Click on it to expand it, then click the **Create Activity / Enrollment / Service** link.



Create Activity / Enrollment / Service Link

General Information Tab

1. In the General Information area, select the desired Customer Program Group, **10B – Adult Individualized Services/Training**
2. Select/confirm the staff member LWDB region.
3. Select/confirm the staff member Office Location.
4. Click the **Select Activity Code** link and choose **166 – Referral to Adult Education and Literacy (AEL) services.**
5. Select the **Today** link to enter the Actual Begin Date.
6. Select the **Today** link to enter the Projected End Date.
7. Click **Next** to save the data and proceed to the next tab.

Service Provider Tab

1. Select **Sample Office Services Provider** from the Provider list box.
2. Select **166 – Referral to Adult Education and Literacy (AEL) services** from the Service, Course, or Contract list box.
3. Click **Next** to save the data and proceed to the next tab.

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #14: Create the WIOA Training Justification Form





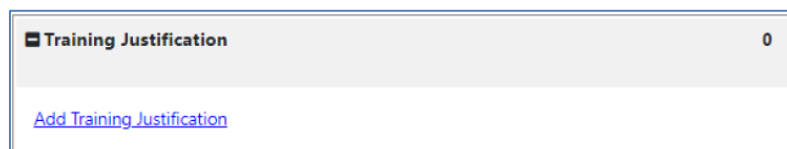
Objective: Perform data entry to identify training as a necessary deliverable for the customer.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the individual you are managing would benefit from training.

Purpose: This exercise helps participants practice documenting the need to obtain training services.

To create a Training Justification Form:

1. Continue to assist the individual.
2. From the Staff Profile menu, select the **Programs** link.
3. Scroll down to the programs area. Click the **plus sign icon**  to expand their WIOA Application.
4. Click the **plus sign icon**  to expand the Training Justification ribbon and click the **Add Training Justification** link.



Training Justification Link

5. In the Location Information section, select/maintain the default LWDB and Office Location.

6. In the Training Justification section, select/maintain the **Today** link to enter the Training Justification Date.
7. Select the **ABE or ESL in conjunction with Training** check box and the **Other Occupational Skills Training** check box to select the Recommended Types of Training. This indicates the training services to be available for enrollment.
8. Click the **Add an Occupation** link.
 - i. Click the **Search Occupation(s)** link.
 - ii. Enter **Home Health Aide** in the Keyword Search field.
 - iii. Select the **Home Health Aides** match link displayed.
 - iv. Select **Save**.
9. Click the **Add an Industry** link.
 - i. Click the **Search for NAICS Code** link.
 - ii. Select the **Health Care and Social Assistance** link.
 - iii. Select **Save**.

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

10. In the section titled **The individual has met the following conditions for training under the Workforce Innovation and Opportunity Act (WIOA)**, select the following:
- i. For Conditions 1–6, select **Yes**.
 - ii. For Condition 7, select **No**.
 - iii. For Condition 8, select **Yes**.

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

11. In the Training Approval section, Meets Training Justification Requirements, maintain/select **Yes**.
12. Select the **Today** link to enter the Training Approval Date. This determines when the training codes will be available for enrollments. The Training Approval Staff User is filled in by the system when the form is saved.

Note: In the Live site, authorized staff will receive a system notification to formally approve the WIOA training request. For training, staff will approve this request by maintaining the Yes response and entering the approval date (today).

13. (Optional) In the Staff Information section, enter Comments as needed.
14. (Optional) Create a new case note by clicking the **Add a new Case Note** link after the record is saved.
15. Click **Save**. The Training Justification ribbon displays the added record shown in a table.

Exercise #15: Create WIOA Enrollment Record 4




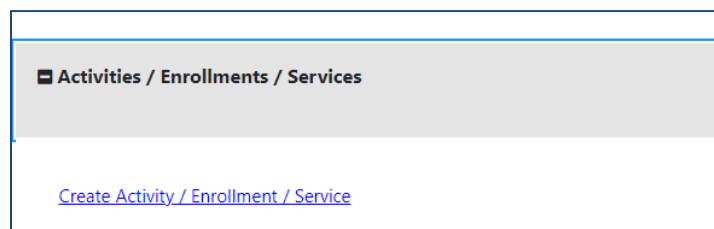
Objective: Perform data entry to record the delivery of a WIOA program service.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and created at least one WIOA program service.

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

To complete a WIOA service enrollment record:

1. From the Staff Profiles menu, select the **Programs** link.
2. 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.
3. Click on it to expand it, then click the **Create Activity / Enrollment / Service** link.



Create Activity / Enrollment / Service Link

General Information Tab

1. In the General Information area, select the desired Customer Program Group, **93-Statewide Adult**.
2. Select/confirm the staff member LWDB region.
3. Select/confirm the staff member Office Location.
4. For Grant name, select **WIOA Adult Statewide**.
5. Click the **Select Activity Code** link and choose **328 – Occupational/Vocational Training (Non-ITA)**.
6. Select the **Today** link to enter the Actual Begin Date.
7. Enter a date 30 days from today's date to enter the Projected End Date.
8. Select **No** for Participant has been issued an ITA and the ITA will pay for this service.
9. Click **Next** to save the data and proceed to the next tab.

Service Provider Tab

1. Select/confirm **Sample Training Service Provider** from the Provider list box.
2. Select/confirm **328 – Occupational/Vocational Training (Non-ITA)** from the Service, Course, or Contract list box.
3. Select the **Occupational Training Code** link.
4. From the window displayed, select **Home Health Aides**.
5. Click **Next** to save the data and proceed to the next tab.

Closure Information Tab

To enter closure data:

1. Click **Finish**.

Exercise #16: Entering Measurable Skills Gain (MSG)





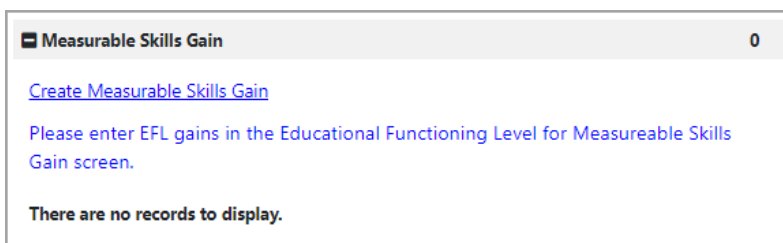
Objective: Perform data entry to document the customer’s skill achievement status.

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

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

To record a Measurable Skills Gain for the client:

1. Find and assist the desired individual.
2. From the Staff Profiles menu, select the **Programs** link.
3. Click the **plus sign icon**  to expand their WIOA Application ribbon.
4. 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

5. Select/confirm the local workforce development board (LWDB) and Office Location.
6. In the Skill Attainment Information section, select the Skill Type, **Training Milestone**.
7. Select the **Today** link to enter the Skill Attainment date.

General Information

User Login: WIOAUSER5
State ID: 11830
User ID: 31778
Name: Monty Hall
Program Entry Date: 10/17/2023
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 (30427)
Record Create Date: 10/18/2023 11:07:30 AM
Staff User Last Edited: Marks, John (30427)
Record Last Edited Date: 10/18/2023 11:13:01 AM

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

ID	Create Date	Subject	Action
No data found.			

Skill Achievement Entry Page

8. Select **Other Training Milestone** for the Type of Achievement.
9. To verify this information:

- i. Click the **Verify** link and select **Report Card**.
 - ii. (Optional) Select **Scan** or **Upload** to associate verification documentation with this file.
10. (Optional) Select **Add a new Case Note** to compose a case note.
11. Click **Save**.

Exercise #17: Documenting Educational Functioning Level (EFL) for Measurable Skills Gain (MSG)





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

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

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

To create an Educational Functioning Level Pre-Test record:

1. Find and assist the desired individual.
2. From the Staff Profiles menu, select the **Programs** link.
3. Click the **plus sign icon**  to expand their WIOA Application ribbon.
4. Click the **plus sign icon**  to expand the Educational Functioning Level for Measurable Skills Gain ribbon and click the **Create Educational Functioning Level Record** link. The system displays the Educational Functioning Level – pre-test entry page.

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

5. In the General Information section, select/confirm the Customer Group, LWDB/Region, and One Stop Location.
6. Select **Adult** from Customer Group.
7. In the Pre-Test section:
 - i. Select **Today** to enter the Date of Pre-Test.
 - ii. Select the Assessment Category, **ABE**.
 - iii. Select the Type of Assessment, **TABE 11-12**.
 - iv. Select the Functional Area of the assessment, **Reading**.
 - v. (Optional) If you know the Assessment Form/Version Info, you may enter it.

- vi. Enter the Pre-Test Score (**500**). The score (along with the Assessment Category, Type of Assessment, and Functional Area) determines the EFL value and whether the score reflects basic skills deficiency (Yes or No).
- vii. Click **Save** to complete the EFL record. The Educational Functioning Level ribbon redisplay with the pre-test record displayed in table format.

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

Exercise #18: Preparing for WIOA Case Closure





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

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the individual is preparing to exit the WIOA program.

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

To close program services:

1. Find and assist the desired individual.
2. From the Staff Profiles menu, select the **Programs** link.
3. Click the **plus sign icon**  to expand their WIOA Application ribbon.
4. Click the **plus sign icon**  to expand the Activities / Enrollments / Services ribbon.
5. For each service, click the **Close** link displayed under the Actual End Date column heading.
6. Select the **Today** link to enter the last activity (end) date for the service.

Note: Business rules may prevent staff from entering an actual end date greater than the projected end date for same-day service durations.

7. Select **Successful Completion** for the Completion Code.
8. Click **Finish**.
9. Repeat this process for each open service.

To close Objectives and/or Goals for the IEP:

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

1. Find and assist the desired individual.
2. From the Staff Profiles menu, select the **Plan** link.
3. Open the IEP plan by selecting the **Edit** link in the Action column.
4. Click the Objectives or Goals tab, as appropriate. Close the Objectives first before closing the Goal with the following instructions:
 - i. Click the desired **Edit** link.
 - ii. In the **Objective (or Goal)** Information section:
 - 1) Select the **Today** link for the Actual Completion Date.
 - 2) Select **Closed** as the Completion Status.
 - 3) Select **Successful** as the Reason Closed.
 - 4) Add a comment, if desired, then click **Save**. Repeat as needed.

Exercise #19: Creating a WIOA Case Closure





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

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the individual is preparing to exit the WIOA program.

Purpose: This exercise helps participants practice managing the data entry required to exit the client if they satisfy a global exclusion reason.

To create a Case Closure:

1. Find and assist the desired individual.
2. From the Staff Profiles menu, select the **Programs** link.
3. Click the **plus sign icon**  to expand their WIOA Application ribbon.
4. Click the **plus sign icon**  to expand the Closure ribbon.
5. Click the **Create Closure** link.

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

6. In the General Info section:
 - i. Select your office location.
 - ii. Select the customer's accountability closure / exit status (**Neither condition applies**).
 - iii. (Optional) Select a case closure reason.

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

7. (Optional) In the Outcome Information section:
 - i. Select the customer's school status at exit, **Not attending school, H.S. Graduate**.
 - ii. Select the **Verify** link and choose **School Records**.

- iii. To close the list, select **Verify** again.
8. In the Employment Information section, select **No** for Entered Employment.
9. (Optional) Select **Add a new Case Note** to compose a case note on behalf of the client.
10. Select **Save**.

Note: From this point forward, if staff click to create additional activities, enrollments, or services, staff cannot record the delivery of planned services; only follow up services, which display the letter **F** for identification purposes.

Exercise #20: Managing Program Exit/Outcome





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

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the individual's program services are closed.

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

To Create an Exit/Outcome record:

1. Find and assist the desired individual.
2. From the Staff Profiles menu, select the **Programs** link.
3. Click the **plus sign icon**  to expand their WIOA Application ribbon.
4. Click the **plus sign icon**  to expand the Exit/Outcome ribbon.
5. Click the **Create Exit/Outcome** link on the Programs tab.

The screenshot displays a web form with the following sections and fields:

- General Information:**
 - Login Name: GSIWIOA_2
 - User ID: 30032
 - State ID: 11100
 - Name: Grace Hernandez
 - *LWIA/Region: Capital Area WF Board (dropdown)
 - *Office Location: 123 WF SOL Capital Area East (dropdown)
 - *Staff Position: Staff (dropdown)
- Exit Information:**
 - *Exit Date: 06/23/2023 (calendar icon) Today
 - Exit Reason: None Selected (dropdown menu open showing options: None Selected, Institutionalized, Health/Medical, Deceased, Reservist called to Active Duty, In Foster Care and moved from area by foster care system)
- Alternate Contact Information:** (Section header visible, fields obscured)

WIOA Exit / Outcome Form

6. In the General Information section, select/maintain your LWDB/Region, Office Location, and Staff Position.
7. In the Exit Information section:
 - i. Select/maintain today's date to set the exit date.
 - ii. Select **Health/Medical**.
8. Select **Save**.

Caution: 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.

Exercise #21: Create a WIOA Grant Outcome Form





Objective: Perform data entry to document the customer's employment status after receiving grant block services.

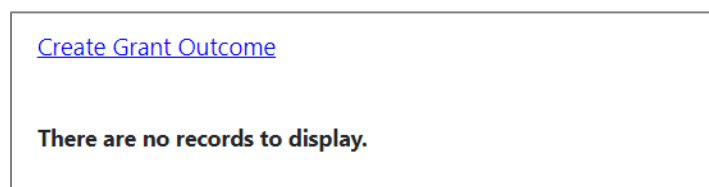
Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the individual received services funded by a grant.

Purpose: This exercise helps participants practice documenting the information required to complete a grant outcome form.

Note: The service for which the grant applies must be closed before managing this activity.

To create a grant outcome record:

1. Find and assist the desired individual.
2. From the Staff Profiles menu, select the **Programs** link.
3. Click the **plus sign icon**  to expand their WIOA Application ribbon.
4. Click the **plus sign icon**  to expand the Grant Outcome ribbon and click the **Create Grant Outcome** link.



Create Grant Outcome Link

- From the General Information section, select your LWDB/Region, Office Location and Staff Position.
- In the Grant Outcome section, select the **Not De-WIOA Statewide Adult** grant from the drop down. (Only grants with associated services in the service table will appear.)

Note: The grant name displayed in this drop down is correct. The **Not De-WIOA** refers to the WIOA Statewide Adult grant not being defined as a local grant code, as shown below:

Grants ?

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
NonWIOA Special Grant	32	Sample NonWIOA Special Grant	Not Defined	10/17/2023	Remove
Statewide Adult	28	WIOA Adult Statewide	Not Defined	10/17/2023	Remove

WIOA Statewide Adult Grant Table from WIOA Application

- Select **No** for Employed at Grant Outcome.

Grant Outcome Information

* Grant:

Grant Outcome Date: 10/18/2023 12:00:00 AM

* Employed at Grant Outcome:

[Add/Edit Entered Employment](#)

* Grant Outcome:

Grant Outcome Information Section

8. (Optional) Select the **Add/Edit Entered Employment** link if you would like to view the data entry form at this time.
9. For Grant Outcome select **Not Employed at Exit**.
10. Click **Save** to save the form and return to the Programs tab.

Exercise #22: Create a Follow Up Record





Objective: Explore the data entry required for staff to obtain performance metrics for four quarters after exit quarter.

Assumption: You are in the WIT training environment at [WIT Case Management Training Site](#) and the individual has exited the WIOA program.

Purpose: This exercise helps participants practice performing the required data entry to obtain performance metrics for federal reporting.

Note: Actual, required WIOA quarterly follow ups cannot be created in the Training environment. To simulate the data entry process, training participants will create a local follow up.

To complete a quarterly follow-up:

1. Find and assist the desired individual.
2. From the Staff Profiles menu, select the **Programs** link.
3. Click the **plus sign icon**  to expand their WIOA program ribbon.
4. Click the **plus sign icon**  to expand the Follow-ups ribbon. In the live site, the system will display the required quarterly follow up schedule for individuals who soft exit from the WIOA program, as shown below:

[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

5. Click the **Create Local Follow Up** link.
6. (Optional) In the General Information section, click the **Edit Contact Information** link to modify the customer's contact information.
7. (Optional) In the Alternate Contact Information section, to add or edit a contact, click the **Manage Alternate Contacts** link.
8. (Not shown for Local Follow Up types until record is saved; optional) In the Contact Attempts section:
 - 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 later.

Note: The maximum number of contact attempts allowed is indicated in red text at the bottom of the Contact Attempts section (10).

9. In the Follow-up Employment Information section, select **Yes** for Worked in Quarter.
10. Click **Add Employer**. Work on your own to practice creating an entered employment record by completing the required fields, minimally.
11. Click **Save** to secure your edits.
12. Continue to the Follow-up Education Information section.
13. Select **No Placement** for Education in Quarter.
14. In the Current Status at Follow-up section:

- i. Select **Today** for the Actual Date of Follow-Up.
 - ii. Select **Telephone – Individual** for the Contact Type.
If you select Other (specify), describe the contact type in the Other (specify) field.
15. In the Staff Information section, select/maintain your LWIA/Region and Office Location.
 16. (Optional) Click **Add a new Case Note**.
 17. (Optional) Perform Case Assignment, if desired.
 18. Click **Save** to save your edits.

Follow-ups 1			
Create Local Follow Up			
			Search: <input type="text"/>
Required By	Date Complete	Status	Follow Up Type
	07/25/2023	Completed	Local

Sample Local Follow Up Record