

# WorkinTexas.com NCP Choices Training Exercise Workbook

Prepared 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.

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## NCP Choices Program: Case Management Training

This manual contains the exercises for the WorkinTexas.com (WIT) NCP Choices Training class.

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

**Note:** The data, examples, and images in this manual are taken from the training database system and do not contain any Personal Information (PII). The job seekers, employers and companies identified in exercises 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 WorkinTexas.com 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.

### About This Training

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

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

### **Guidance for Using This Workbook**

In the exercises:

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

## **Exercise #1: Login as Staff**

**Objective:** Login as Staff.

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

**Purpose:** This exercise is to become familiar with how to log into the WorkinTexas.com environment.

### **To Login as staff, follow these steps:**

1. From the Home Page, click the **Sign In / Register** button.
2. In the **Username** field, enter the username provided by your instructor.
3. In the **Password** field, enter the password provided by your instructor.
4. Select **I'm not a robot** checkbox for reCAPTCHA, if applicable.
5. Click **Sign In**.
6. Review Staff Sign-in Notice text.
7. Click **I agree**.

## Exercise #2: Client System Registration

**Objective:** Create a fictitious individual for the purpose of NCP Choices case management training.

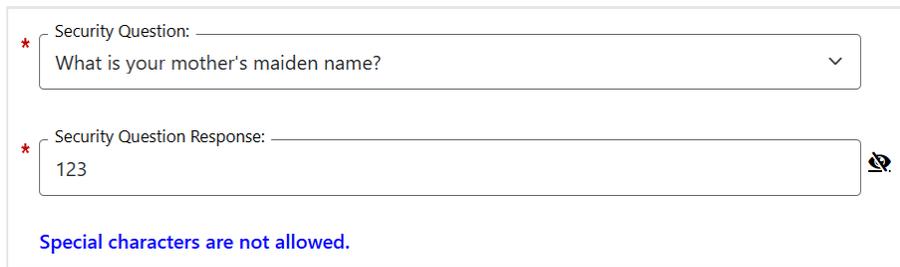
**Assumption:** You are in the WorkinTexas.com training environment at [WorkinTexas.com Case Management Training Site](#) and accessing My Staff Dashboard.

**Purpose:** This exercise is designed to help you become familiar with creating an individual registration.

**Note:** For this exercise, you will create your own fictitious individual. Except where noted, you will make up the information for the individual you are creating.

### To create an individual account:

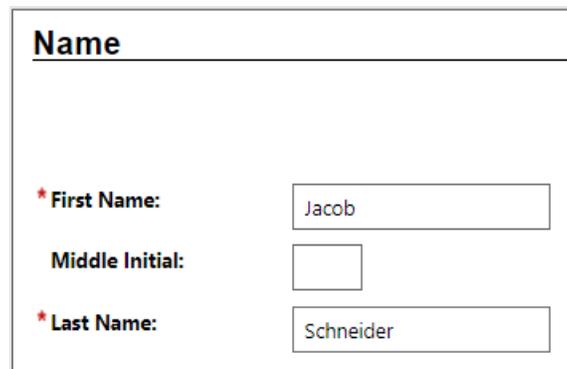
1. From the left navigation menu under the **Services for Workforce Staff > Manage Individuals** menu, select the **Create an Individual** link.
2. In the Login Information section, enter a fictitious individual's username. Make up this information according to the business rules displayed in blue text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



A screenshot of a web form with two input fields. The first field is labeled "Security Question:" and contains the text "What is your mother's maiden name?". The second field is labeled "Security Question Response:" and contains the text "123". Below the second field, there is a blue link that says "Special characters are not allowed."

## Login Information Section of Create Individual Account Process

8. In the Name section, enter the individual's first and last name. Do not use your name. You can make this up.



A screenshot of a web form titled "Name". It contains three input fields: "First Name:" with the value "Jacob", "Middle Initial:" which is empty, and "Last Name:" with the value "Schneider".

## Name Section of Create Individual Account Process

5. In the Social Security Number section, select the **I do not wish to provide my Social Security Number** checkbox.
6. In the Phone Number section, enter the individual's primary phone number (**Create a fictitious local phone number**).
7. In the E-mail Address section, enter the individual's primary email address and re-enter it in the Confirmation text box. (**Make this email up**).

**E-mail Address**

Primary E-mail:

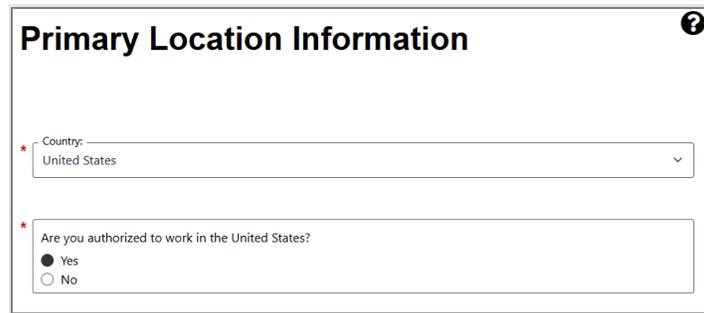
[Create E-mail Account](#) 

[Read Our E-mail Security Policy](#) 

Confirm Primary E-mail Address:

### **Email Address Section of Create Individual Account Process**

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



The screenshot shows a form titled "Primary Location Information" with a help icon in the top right corner. It contains two required fields, each marked with a red asterisk. The first field is a dropdown menu labeled "Country:" with "United States" selected. The second field is a radio button question: "Are you authorized to work in the United States?" with "Yes" selected.

## Primary Location Information Section of Create Individual Account Process

10. In the Residential Address section, select whether the individual is homeless, select **No**.
11. Enter their address details accordingly (**Enter a local ZIP Code**).
12. Verify the City.
13. Verify the State.
14. Verify the County.
15. Verify Country is **United States**.
16. In the Demographic Information section, enter the individual's date of birth (MM/DD/YYYY) format of **01/01/1990**.

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

17. Select the **Gender** of your participant.
18. Select **No** for I am currently in Foster Care, or I have aged out of the Foster Care System.

## Demographic Information ?

\* Date of Birth:   

(MM/DD/YYYY)

Age:  
35

\* 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 of Create Individual Account Process

19. In the Citizenship section, indicate the individual's citizenship status. Select **Citizen of U.S. or U.S. Territory.**
20. In the Disability section, select **No, I do not have a disability.**
21. In the Education Information section, select the individual's highest education achievement level, **12<sup>th</sup> Grade Completed & Did not receive diploma or equivalent** and their current school status, **No, not attending any school.**

## Education Information ?

Your Highest Education Level Achieved:

Are you attending school?

### Education Information Section of Create Individual Account Process

22. In the **Spouse or Caregiver of a U.S. Military Member** section, select **No** for the Are you the Spouse or Caregiver of an active U.S. Military member or a Veteran question.

### Spouse or Caregiver of a U.S. Military Member

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

\*

Yes  
 No

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

23. In the **Military Service** section, select **No** for the Are you currently in the U.S. Military or a Veteran question.

**Military Service**

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

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

Yes

No

### Military Service Section of Create Individual Account Process

24. In the **Ethnic Origin** section, select whether the individual is Hispanic or Latino, (your choice).
25. 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

26. In the **Language** section, select **No**.

### 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

27. Select the **Save** button to complete the registration process.

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

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

### What's Next?

-  [Add information to better match job requirements](#)  
Employment and education history are sometimes required in the application process and are used as indicators when comparing jobs with applicants. By completing a few more prompts, you can see how well you qualify for the jobs you have found and employers will compare you favorably against other applicants.
-  [Create a résumé](#)  
Some jobs in our system require the applicant to apply with a résumé. This option will help you create that résumé and add the employment history and education. Employers can also search for résumés on our system, so completing a resume will help employers find you.
-  [Apply for Career Services and Training](#)  
Federal and state grants are available for qualified applicants to obtain career services and training or get priority assistance. Completing the full registration will help staff identify if you qualify for any of these grants.
-  [Additional Veteran Services](#)  
Additional services may be available to you if you are a qualified veteran. We will require you to answer a few more detailed veteran questions.

## Registration Confirmation Page

## Exercise #3: NCP Choices Participant Application



**Objective:** Create and complete an NCP Choices Application.

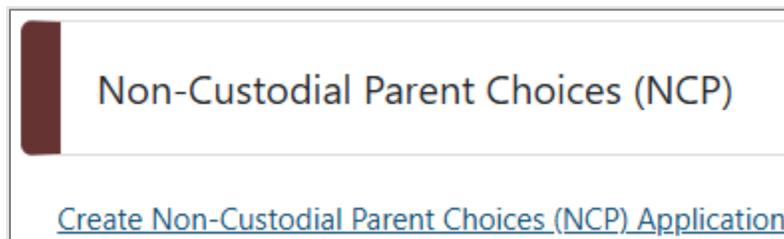
**Assumption:** You are in the WorkinTexas.com training environment at [WorkinTexas.com Training Site \(opens in a new window\)](#) and are assisting your created participant.

**Purpose:** This exercise is necessary for staff to practice creating an NCP Choices Application.

### To create an NCP Choices application:

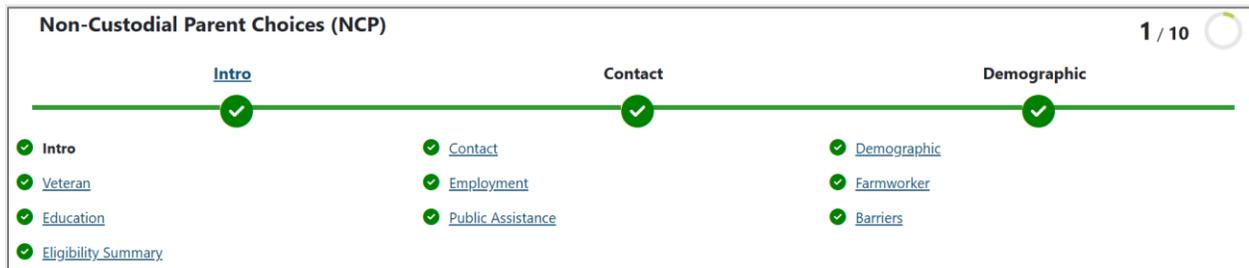
1. Click on the blue hyperlink of your individuals **Name** from the Currently Managing section. EX: [Spencer, Michael](#).
2. Under Staff Profiles, expand the **Case Management Profile** folder. Select the **Programs** link.
3. Scroll down to the **Non-Custodial Parent Choices (NCP Choices)** section and click the **Create Non-Custodial Parent Choices (NCP) Application** link. The application wizard launches.

**Note:** Many of the fields are already prepopulated for you.



### Non-Custodial Parent Choices (NCP) Application Link

## Intro: Page 1 of 10



### Non-Custodial Parent Choices (NCP) Application Progress Bar

1. If not already populated, select Today for the **Application Date**.
2. For the **Court Order Date**, select **Today**.
3. Click the **Verify** link and select the **Court Order Date Verification** radio button.
4. Click the **Case Type** and select **Establishment**.
5. Confirm that the **LWDB/Region**, **Office Location**, and **Office Location of Responsibility** are accurate. If not select the appropriate locations.
6. Select the **Next** button, located at the bottom of the screen, to proceed to the next screen.

**Note:** Selecting the **Next** button validates the data, ensures that all required fields are completed, saves the information you entered, and moves you to the next screen.

## **Contact: Page 2 of 10**

1. Confirm the individual's First and Last Name, Social Security Number, Residential and Mailing Address, Phone Information, and Email Information. Edit the information as necessary.
2. Add the required **Preferred Method of Contact** and **Primary Phone Type** from the drop-down menus.
3. If applicable, select the **Add New Contact** link to add a new contact to this account.
4. Select the **Next** button.

## **Demographic: Page 3 of 10**

1. Most of the questions on this page are already prepopulated for you. Confirm the Date of Birth and gender information.
2. Confirm the Authorized to Work in the U.S selection.
3. Confirm the U.S. Citizenship Status of U.S. or U.S. Territory.
4. Confirm the Hispanic/Latino Heritage selection.
5. Confirm the Race (Ethnicity).
6. Confirm the Disability selection.
7. Select the **Next** button to save your edits and proceed to the Veteran Page.

## **Veteran: Page 4 of 10**

1. Most of the questions on this page are already prepopulated for you. For example, the Spouse or Caregiver of a Military Member section is prepopulated for you.

2. For the Military Service section, the answer is prepopulated for you.
3. Select the **Next** button.

### **Employment: Page 5 of 10**

1. Add the **Employment Status at Time of Court Order** by selecting from the drop-down menu. Select **Unemployed**.
2. Confirm the **Not in the labor force** selection of **No**.
3. Confirm the **In a Registered Apprenticeship Program** selection.
4. Select the **Desired Occupation and Title #1** by clicking the **Search for O\*Net Code** link.
5. Enter **Cook** into the Keyword Search field and select **Cooks, Restaurant**.
6. For Years of experience in this area, enter **3**.
7. For **Unemployed due to layoff or termination**, select **No**.
8. Under the **Individual Employment History** section, select the **Add Employment History** link. For this exercise, below are the answers for each field to complete this screen:
  - i. **Employer Name: Grill at Leon Springs** (A pop-up window will open. Select the Grill at Leon Springs, 6106 Broadway, option.
  - ii. **Job Title: Cook**

**Note:** After typing Cook, a menu will appear for you to select from. Select, **Cook** from the list.

- iii. **Suggested Occupation:** Click the drop-down menu and select **Cooks, Restaurant.**
- iv. **Type of employment:** Regular
- v. **Full or part-time:** Full Time
- vi. **Gross Salary:** \$25,000
- vii. **Salary is based upon:** Year
- viii. **Date you began work:** 01/01/2022
- ix. **Reason for Separation:** Job Ended
- x. **Last day worked:** 12/01/2024
- xi. **Job duties:**

Select the **Insert Occupational Description** link located below the free form text box.

When the window opens, select the **Detailed Description** radio button.

Select the **Submit** button. The window will close.

Select the **Save** button. When the **Please Confirm** windows appear, select the **OK** button for ALL notices that appear.

Select the **Next** button to proceed to the **Farmworker Information** page.

## **Farmworker: Page 6 of 10**

1. Confirm the **Eligible Migrant Seasonal Farmworker Status.**

2. For the **Have you worked as a farmworker in the last 12 months** question, select **No**.
3. Select the **Next** button.

### **Education Information: Page 7 of 10**

1. For **Highest School Grade Completed**, select **No School Grade Completed**.
2. For **High School Diploma or Equivalent Received**, select **No**.
3. For **Highest Education Level Completed**, select **No Educational Level Completed**.
4. For **School Status**, select **Not attending school or secondary school dropout**.
5. Click the **Next** button to proceed to the **Public Assistance Information** page.

## **Public Assistance Information: Page 8 of 10**

1. Maintain the **No** selections.
2. Click the **Next** button.

## **Individual Barriers: Page 9 of 10**

1. Maintain the **No** selections.
2. Click the **Next** button.

## **Eligibility Summary: Page 10 of 10**

If you completed the application as instructed, your applicant should indicate **Yes**, he/she is eligible for the NCP Choices program.

1. Select the **Finish** button. A confirmation window will open.
2. Select the **Return to Programs Tab** link. The NCP Choices Application should now appear as Complete.

## Exercise #4: Participation Ribbon and Initial Service Entry (Service #1)



**Objective:** To create Participation Record.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to create a participation record in the WorkinTexas.com environment.

### To create a participation record:

1. Select the **plus sign**  **icon** below the NCP Choices application status to expand the ribbons menu.
2. From the NCP Choices ribbons menu, click the **Participation** ribbon to expand this ribbon. The Create Participation link will appear.
3. Select the **Create Participation** link. The Participation Information page opens.



### Participation Ribbon

4. For Participation Date, select the **Today** link.
5. Click the **Next** button. The **General Information** tab opens.

6. Confirm the Customer Program Group selection of **NC1-NCP Choices**.
7. Confirm the **LWDB**.
8. Select the **Office Location**, 125 WF SOL Capital Area South.

<b>Participation Information</b>	
<b>* Participation Date:</b>	<input type="text" value="02/18/2025"/>  <a href="#">Today</a>
<b>Participation Age:</b>	35

### **Participation Information**

9. Select the Activity Code by clicking the **Select Activity Code** link. The Activity Code window will appear.
10. Select **153 Workforce Services Orientation**.
11. **Actual Begin Date** will be prepopulated. If not, select **Today**.
12. Enter a **Projected End Date**. Select **Today**.
13. Click the **Next** button to proceed to the next screen. The **Service Provider** tab will open.
14. Confirm the Provider information.
15. Click the **Next** button. The **Closure Information** tab will open.
16. Select the **Finish** button.

**Note:** If you do not complete a first enrollment (i.e., if you exit the enrollment wizard before saving the last page), this Participation record will not be saved. The first activity will display a Trophy icon next to the service name.

This new activity you just added will display in a table under the **Activities/Enrollments/Services** ribbon from which staff can view and modify the activities (see figure below).

Status	ID #	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	12847	<a href="#">102 - Initial Assessment</a> ABC Service Provider		NCP Choices	N/A	02/18/2025	02/18/2025	<a href="#">Close</a>

Page 1 of 1

Rows: 25

### Activities/Enrollments/Services Ribbon with Existing Activities

## **Exercise #5: Activities / Enrollments / Services Ribbon (Service #2)**



**Objective:** Add another service:

- **102 Initial Assessment**

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to record service activities for the Initial Assessment.

**To add the 102 Initial Assessment Service:**

1. From the Activities/Enrollments/Services ribbon, select the **Create Activity/Enrollment/Service** link. The Activity Enrollment wizard displays the **General Information** tab.

Schedule

### General Information

**Participant User Name:** FSINATRA1+

**Participant State ID:** 34005

**Last Name, First Name MI:** Sinatra, Frank

**Address:** 123 Blue Rd.  
Addison, TX 75001

**Application Summary:** **Program:** Non-Custodial Parent Choices (NCP)  
**Application date:** 01/21/2025  
**Eligibility Date:** 01/14/2025

**Participation Date:** 02/04/2025

**\* Customer Program Group:** NC1 - NCP Choices ▼

[ [Select program enrollment template](#) ]

**\* LWDB:** Capital Area WF Board

LWDB cannot be modified if staff has local region assignment.

**\* Office Location:** 125 WF SOL Capital Area South ▼

### Activity Enrollment Wizard - General Information Tab

2. The Customer Program Group section is automatically set to **NC1 – NCP Choices**. The **LWDB** is prepopulated already.
3. **Office Location** is prepopulated. If not, select **125 WF SOL Capital Area South**.
4. Under the **Enrollment Information** section, click the **Select Activity Code** link to open an activity list, and select **102 Initial Assessment**.
5. WorkinTexas.com requires an actual begin date or a projected begin date.

- For **Actual Begin Date**, select the **Today** link. (Note: Actual Begin Date cannot be a future date.)
  - Enter the Projected End Date. For purposes of training, select the **Today** link.
6. In the Staff Information section, you can assign a case manager or assign yourself as case manager, if applicable.
  7. Select the **Next** button. The **Schedule** tab opens.
  8. For **Monday**, under the **Scheduled** column, enter 9:00AM start time and enter 10:00AM for the end time.
  9. Click the **Next** button.
  10. The **Service Provider** tab will open.
  11. Confirm the Provider information.
  12. Click the **Next** button. The **Closure Information** tab will open.
  13. Select the **Finish** button.

## Exercise #6: Work Readiness Assessment Ribbon



**Objective:** Record a work readiness assessment.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to practice creating a work readiness assessment by identifying barriers to employment in the WorkinTexas.com environment.

### To record a work readiness assessment:

1. Click the **Work Readiness Assessment** ribbon to expand its content.
2. Under the Work Readiness Assessment ribbon, select the **Create Work Readiness Assessment** link. The evaluations page displays (see figure below).

Basic Needs Evaluation	
* Housing:	<input checked="" type="checkbox"/> No issues reported
	<input type="checkbox"/> Has difficulty paying for food, utilities, bills, etc.
	<input type="checkbox"/> Facing eviction
	<input type="checkbox"/> Living in unsafe conditions
	<input type="checkbox"/> Resides in a shelter or temporary housing arrangement
	<input type="checkbox"/> Homeless
	<input type="checkbox"/> Add "Housing" barrier
* Personal/Family Issues:	<input type="checkbox"/> No issues reported
	<input type="checkbox"/> Children having problems in school
	<input type="checkbox"/> DFPS Involvement
	<input checked="" type="checkbox"/> Household members with health issues
	<input type="checkbox"/> Add "Personal/Family Issues" Barrier

### Work Readiness Evaluation Page

3. Select the applicable check boxes that assess the individual’s basic needs, education factors, health factors, judicial system involvement, employability, and any other barriers that may hinder the individual from attaining work. For our exercise, select **No issues reported** to all except:
  - **Credential Training:** Select **Skills are outdated, Needs training, Needs credential to reach employment objective**. Also select the **Add Credential/Training Barrier** checkbox.
  - **Employability:** Select **Sporadic or short-term episodes of employment**. Also select the **Add Work History Barrier** checkbox.
4. If applicable, enter other barriers that are not listed.
5. If applicable, enter additional comments.
6. Select the **Save** button. The Work Assessment table appears in the Work Readiness Assessment ribbon.

Work Readiness Assessment				
<a href="#">Create Work Readiness Assessment</a>				
				Search
Create Date	Current Barriers	Date Last Edited	Edited By	Action
1/15/2025	Child Care Availability, Child Care Expenses, Legal Issues	1/15/2025	Chris Cekan	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Print</a> <a href="#">View Barrier History</a>

Showing 1 to 1 of 1 entries

**Work Readiness Assessment Table**

## Exercise #7: Individual Employment Plan (IEP)



**Objective:** Create and manage IEP goals and objectives.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise helps participants locate the IEP/ISS and create and manage IEP goals and objectives.

### To create an IEP for the assisted individual:

1. Select the **Plan** link under the Case Management Profile folder or select the **Plan** tab located next to the Programs tab.
2. Under the Individual Employment Plan/Service Strategy section, select the **Create Individual Employment Plan/Service Strategy** button. The Plan tab of the IEP displays.
3. In the Plan Information section, select the **Today** link for the **Plan Start Date**.

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

### Plan Information Page

4. Select the **LWDB/Region**, select Capital Area WF Board.
5. Select the **Plan started in office location**, select 125 WF SOL Capital Area South.
6. Click **Next** to save your data entry. The Goals tab opens.

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

1. Under the **IEP/ISS Goals** section, select the **Add New Goal** link. The Add New Goal page displays (see figure below).

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

- \* LWDB/Region:** Capital Area WF Board
- \* Office:** 125 WF SOL Capital Area South
- \* Program Affiliation:**  Non-Custodial Parent Choices (NCP)
- \* Type of Goal:** Employment
- \* Term of Goal:** Long Term
- \* Description of Goal:** Obtain meaningful high paying employment.
- \* Date Established:** 02/04/2025 (mm/dd/yyyy) Today (MM/DD/YYYY)

**Create IEP – Add New Goal Page**

2. In the **Goal Information** section, confirm the LWDB/Region and Office.
3. For **Program Affiliation**, select the **Non-Custodial Parent Choices (NCP)** check box.
4. For Type of Goal, select **Employment**.

5. For Term of Goal, select **Long Term**.
6. For a Description of the goal, enter **Obtain meaningful high paying employment**.
7. For Date Established, select the **Today** link.
8. Enter the Estimated Completion Date for the goal (make this up as appropriate for the scenario).

**Note:** Leave the Actual Completion Date blank until you are ready to close the goal, then you will enter the Actual Completion Date, select **Closed** under Completion Status, and indicate the Reason Closed.

9. Enter any additional information in the **Goal Details** text box.
10. Click **Save**. The Goals tab redisplay with a table displaying the added goal along with links to Edit or Delete.
11. Repeat this procedure for as many goals as desired. For this training, we will only enter one goal.
12. Click **Next** to proceed to the **Objectives** tab, where you will add objectives that support the goals.

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

1. In the **Objective Information** section, click the **Add new objective** link to enter an objective for the individual manually.

<b>Objective Information</b>	
* <b>Goal</b>	Obtain meaningful high paying employment. ▾
<b>Goal Date Established</b>	2/4/2025
* <b>LWDB/Region</b>	Capital Area WF Board ▾
* <b>Office Location</b>	125 WF SOL Capital Area South ▾
* <b>Program Affiliation</b>	Non-Custodial Parent Choices (NCP) ▾
* <b>Objective</b>	Attend trainings.
* <b>Date Established</b>	02/04/2025 (mm/dd/yyyy) 📅 Today (MM/DD/YYYY)
* <b>Review Date</b>	03/20/2025 (mm/dd/yyyy) 📅 Today (MM/DD/YYYY)

**Create IEP – Add New Objective Page (Manual Entry)**

2. Select the **Goal** to be associated with this objective: **Obtain meaningful high paying employment.**
  - **Note:** This is the goal that we just entered.
3. Confirm the **LWDB/Region** and **Office Location**.
4. For Program Affiliation, select **Non-Custodial Parent Choices (NCP)** from the drop-down menu.
5. For the Objective field, enter **Attend trainings.**
6. For **Date Established**, select the **Today** link.

7. Enter Review Date on which progress should be evaluated  
**(Usually 45 days after Established Date).**
8. Click **Save**. The Objectives tab redisplay with the added objective along with links to Edit or Delete the objective.

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

1. On the Objectives tab, click the **Select pre-defined objectives** link. The Pre-Defined Objectives page opens.
2. Select the **Goal** for the objective(s). There should only be one goal that we added earlier.
3. Select the **LWDB/Region** and **Office Location** if it's not populated already.
4. For Program Affiliation, select **Non-Custodial Parent Choices (NCP)**. The page will refresh with the list of pre-defined objectives for the program (see figure below).

**Objective Information**

\* **Goal**

\* **LWDB/Region**

\* **Office Location**

\* **Program Affiliation**

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

**Create IEP – Select Pre-Defined Objective Page**

5. Click the checkbox in the left column for each objective to add to the individual's program goal. Select the checkboxes for:
  - Employment – Attend Job Fair
  - Employment – Complete Company Applications
  - Employment – Referral to Job
6. For **Date Established**, select the **Today** link for each objective you selected. Click anywhere in the Review Date field to automatically pre-populate the Review Date which is 45 days from the date established date.
7. Click **Save**. The Objectives tab redisplay with the added objectives, along with links to Edit or Delete each of the objectives.
8. Click **Next** to proceed to the Services tab.

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

9. Click **Finish**.

## **Working with Existing IEP Plans**

### **To view and print the entire plan and include signatures:**

1. Click the **Display/Print** link in the Action column of the table. The IEP Display Page displays.
2. To include the Services and/or Goals in the printed plan, in the **Plan Information** section, click the checkboxes.

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

A pop-up window displays, where you select how the signatures will be obtained.

- i. For customers who are present, in-person, click the **Mouse** (Manual) icon.
  - Read the **Certification of Understanding** statements, then use the mouse to write the signature. Click **Apply** to save it and return to the Plan page.
- ii. For a remote participant, click the **Message** icon. The **Message Center – Edit Message** page displays, where you can create and send an Electronic Signature Request message.
  - After clicking **Send**, the message is sent to the recipient’s Message Center, and the Plan page redisplay, showing the date and time the signature request was sent. As soon as the recipient signs the attachment using their mouse, their signature is automatically added to the plan.

4. To capture staff’s signature:

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

- ii. Select the **Click this link to use your saved signature image** hyperlink if you already created one using My Staff Account. The system will automatically display your signature.
5. To print the plan, click the **Print** button at the bottom of the page. A PDF version is generated and displays in a pop-up window. From there, you can download or print the file.

## **Exercise #8: Activities / Enrollments / Services Ribbon (Service #3)**



**Objective:** Add another service:

- **205 Individual Employment Plan (IEP) Service**

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to record service activities for the Individual Employment Plan.

**To add the 205 Individual Employment Plan Service:**

14. From the Activities/Enrollments/Services ribbon, select the **Create Activity/Enrollment/Service** link. The Activity Enrollment wizard displays the **General Information** tab.

General Information
Schedule

**Participant User Name:** FSINATRA1+

**Participant State ID:** 34005

**Last Name, First Name MI:** Sinatra, Frank

**Address:** 123 Blue Rd.  
Addison, TX 75001

**Application Summary:** **Program:** Non-Custodial Parent Choices (NCP)  
**Application date:** 01/21/2025  
**Eligibility Date:** 01/14/2025

**Participation Date:** 02/04/2025

**\* Customer Program Group:** NC1 - NCP Choices ▼

[ [Select program enrollment template](#) ]

**\* LWDB:** Capital Area WF Board

LWDB cannot be modified if staff has local region assignment.

**\* Office Location:** 125 WF SOL Capital Area South ▼

### Activity Enrollment Wizard - General Information Tab

15. The Customer Program Group section is automatically set to **NC1 – NCP Choices**. The **LWDB** is prepopulated already.
16. **Office Location** is prepopulated. If not, select **125 WF SOL Capital Area South**.
17. Under the **Enrollment Information** section, click the **Select Activity Code** link to open an activity list, and select **205 Individual Employment Plan (IEP/EDP)**.
18. WorkinTexas.com requires an actual begin date or a projected begin date.

- For **Actual Begin Date**, select the **Today** link. (Note: Actual Begin Date cannot be a future date.)
  - Enter the Projected End Date. For purposes of training, select the **Today** link.
19. In the Staff Information section, you can assign a case manager or assign yourself as case manager, if applicable.
  20. Select the **Next** button. The **Service Provider** tab opens.
  21. Confirm the **Provider** and **Service, Course or Contract** information.
  22. Select the **Next** button. The **Closure Information** tab opens.
  23. Select the **Finish** button.

## **Exercise #9: Activities / Enrollments / Services Ribbon (Service #4)**

**Objective:** Add another service:

- **605 Choices / SNAP Job Search / Job Readiness**

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to record service activities for job search and job readiness.

**To add the job search job readiness service:**

1. From the Activities/Enrollments/Services ribbon, select the **Create Activity/Enrollment/Service** link. The Activity Enrollment wizard displays the **General Information** tab.

General Information		Schedule
<b>General Information</b>		
<b>Participant User Name:</b>	FSINATRA1+	
<b>Participant State ID:</b>	34005	
<b>Last Name, First Name MI:</b>	Sinatra, Frank	
<b>Address:</b>	123 Blue Rd. Addison, TX 75001	
<b>Application Summary:</b>	<b>Program:</b> Non-Custodial Parent Choices (NCP) <b>Application date:</b> 01/21/2025 <b>Eligibility Date:</b> 01/14/2025	
<b>Participation Date:</b>	02/04/2025	
<b>* Customer Program Group:</b>	NC1 - NCP Choices ▼ [ <a href="#">Select program enrollment template</a> ]	
<b>* LWDB:</b>	Capital Area WF Board <small>LWDB cannot be modified if staff has local region assignment.</small>	
<b>* Office Location:</b>	125 WF SOL Capital Area South ▼	

### Activity Enrollment Wizard - General Information Tab

- The Customer Program Group section is automatically set to **NC1 – NCP Choices**. The **LWDB** is prepopulated already.
- Office Location** is prepopulated. If not, select **125 WF SOL Capital Area South**.
- Under the **Enrollment Information** section, click the **Select Activity Code** link to open an activity list, and select **605 Choices / SNAP Job Search / Job Readiness**.
- WorkinTexas.com requires an actual begin date or a projected begin date.

- For **Actual Begin Date**, select the **Today** link. (Note: Actual Begin Date cannot be a future date.)
  - Enter the **Projected End Date**. For purposes of training, select the **Today** link.
6. In the Staff Information section, you can assign a case manager or assign yourself as case manager, if applicable.
  7. Select the **Next** button. The **Service Provider** tab opens.
  8. Confirm the **Provider** information.
  9. Click the **Next** button. The **Closure Information** tab will open.
  10. Select the **Finish** button.

## **Exercise #10: Activities / Enrollments / Services Ribbon (Service #5)**



**Objective:** Add another service:

- **181 Support Service – Transportation Assistance**

**Assumption:** You have the NCP Choices customer’s account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to record service activities for Support Service – Transportation Assistance.

**To add the Support Service for Transportation Assistance:**

1. From the Activities/Enrollments/Services ribbon, select the **Create Activity/Enrollment/Service** link. The Activity Enrollment wizard displays the **General Information** tab.

General Information		<a href="#">Schedule</a>
<b>General Information</b>		
<b>Participant User Name:</b>	FSINATRA1+	
<b>Participant State ID:</b>	34005	
<b>Last Name, First Name MI:</b>	Sinatra, Frank	
<b>Address:</b>	123 Blue Rd. Addison, TX 75001	
<b>Application Summary:</b>	<b>Program:</b> Non-Custodial Parent Choices (NCP) <b>Application date:</b> 01/21/2025 <b>Eligibility Date:</b> 01/14/2025	
<b>Participation Date:</b>	02/04/2025	
<b>* Customer Program Group:</b>	NC1 - NCP Choices ▼ [ <a href="#">Select program enrollment template</a> ]	
<b>* LWDB:</b>	Capital Area WF Board <small>LWDB cannot be modified if staff has local region assignment.</small>	
<b>* Office Location:</b>	125 WF SOL Capital Area South ▼	

### Activity Enrollment Wizard - General Information Tab

- The Customer Program Group section is automatically set to **NC1 – NCP Choices**. The **LWDB** is prepopulated already.
- Office Location** is prepopulated. If not, select **125 WF SOL Capital Area South**.
- Under the **Enrollment Information** section, click the **Select Activity Code** link to open an activity list, and select **181 Support Service – Transportation Assistance**.
- WorkinTexas.com requires an actual begin date or a projected begin date.

- For **Actual Begin Date**, select the **Today** link. (Note: Actual Begin Date cannot be a future date.)
  - Enter the Projected End Date. For purposes of training, select the **Today** link.
6. In the Staff Information section, you can assign a case manager or assign yourself as case manager, if applicable.
  7. Select the **Next** button. The **Service Provider** tab opens.
  8. Confirm the **Provider** information.
  9. Click the **Next** button. The **Closure Information** tab will open.
  10. Select the **Finish** button.

## **Exercise #11: Activities / Enrollments / Services Ribbon (Service #6)**



**Objective:** Add another service:

- **270 Work Experience – Private For Profit**

**Assumption:** You have the NCP Choices customer’s account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to record service activities for Work Experience.

**To add the Work Experience Service:**

1. From the Activities/Enrollments/Services ribbon, select the **Create Activity/Enrollment/Service** link. The Activity Enrollment wizard displays the **General Information** tab.

General Information
Schedule

**Participant User Name:** FSINATRA1+

**Participant State ID:** 34005

**Last Name, First Name MI:** Sinatra, Frank

**Address:** 123 Blue Rd.  
Addison, TX 75001

**Application Summary:** **Program:** Non-Custodial Parent Choices (NCP)  
**Application date:** 01/21/2025  
**Eligibility Date:** 01/14/2025

**Participation Date:** 02/04/2025

**\* Customer Program Group:** NC1 - NCP Choices ▼

[ [Select program enrollment template](#) ]

**\* LWDB:** Capital Area WF Board

LWDB cannot be modified if staff has local region assignment.

**\* Office Location:** 125 WF SOL Capital Area South ▼

### Activity Enrollment Wizard - General Information Tab

2. The Customer Program Group section is automatically set to **NC1 – NCP Choices**. The **LWDB** is prepopulated already.
3. **Office Location** is prepopulated. If not, select **125 WF SOL Capital Area South**.
4. Under the **Enrollment Information** section, click the **Select Activity Code** link to open an activity list, and select **270 Work Experience – Private For Profit**.
5. WorkinTexas.com requires an actual begin date or a projected begin date.

- For **Actual Begin Date**, select the **Today** link. (Note: Actual Begin Date cannot be a future date.)
  - Enter the Projected End Date. For purposes of training, select the **Today** link.
6. In the Staff Information section, you can assign a case manager or assign yourself as case manager, if applicable.
  7. Select the **Next** button. The **Service Provider** tab opens.
  8. Confirm the Provider information.
  9. To enter the Occupational Training Code, select the **Occupational Training Code** link. A new window will open.
  10. Click the **Select Occupation From ONET Table** link.
  11. Enter **Cook** for Keyword Search and **select Cooks, Restaurant**.
  12. Click the **Next** button. The **Closure Information** tab will open.
  13. Select the **Finish** button.

## **Exercise #12: Activities / Enrollments / Services Ribbon (Service #7)**



**Objective:** Add another service:

- **600 Unsubsidized Employment**

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to record service activities for unsubsidized employment.

### **To add the Unsubsidized Employment Service:**

1. From the Activities/Enrollments/Services ribbon, select the **Create Activity/Enrollment/Service** link. The Activity Enrollment wizard displays the **General Information** tab.

Schedule

### General Information

**Participant User Name:** FSINATRA1+

**Participant State ID:** 34005

**Last Name, First Name MI:** Sinatra, Frank

**Address:** 123 Blue Rd.  
Addison, TX 75001

**Application Summary:** **Program:** Non-Custodial Parent Choices (NCP)  
**Application date:** 01/21/2025  
**Eligibility Date:** 01/14/2025

**Participation Date:** 02/04/2025

**\* Customer Program Group:** NC1 - NCP Choices ▼

[ [Select program enrollment template](#) ]

**\* LWDB:** Capital Area WF Board

LWDB cannot be modified if staff has local region assignment.

**\* Office Location:** 125 WF SOL Capital Area South ▼

### Activity Enrollment Wizard - General Information Tab

2. The Customer Program Group section is automatically set to **NC1 – NCP Choices**. The **LWDB** is prepopulated already.
3. **Office Location** is prepopulated. If not, select **125 WF SOL Capital Area South**.
4. Under the **Enrollment Information** section, click the **Select Activity Code** link to open an activity list, and select **600 Unsubsidized Employment**.
5. WorkinTexas.com requires an actual begin date or a projected begin date.

- For **Actual Begin Date**, select the **Today** link. (Note: Actual Begin Date cannot be a future date.)
  - Enter the **Projected End Date**. For purposes of training, select the **Today** link.
6. In the Staff Information section, you can assign a case manager or assign yourself as case manager, if applicable.
  7. Select the **Next** button. The **Schedule** tab opens.
  8. For **Monday** through **Friday**, under the **Scheduled** column, enter 8:00AM start time and enter 12:00PM for the end time.
    - i. Under the **Supplemental** column, enter 1:00PM start time and enter 5:00PM for the end time.
  9. For **Tuesday**, under the **Scheduled** column, enter 8:00AM start time and enter 12:00PM for the end time.
    - i. Under the **Supplemental** column, enter 1:00PM start time and enter 5:00PM for the end time.
  10. Click the **Next** button.
  11. The **Service Provider** tab will open.
  12. Confirm the Provider information.
  13. To enter the Occupational Training Code, select the **Occupational Training Code** link. A new window will open.
  14. Click the **Select Occupation From ONET Table** link.
  15. Enter **Cook** for Keyword Search and **select Cooks, Restaurant**.

16. Click the **Next** button. The **Closure Information** tab will open.
17. Select the **Finish** button.

## Exercise #13: Create an Objective Assessment Summary (OAS) Form



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

**Assumption:** You are in the WorkinTexas.com training environment at [WorkinTexas.com Case Management Training Site](#) and the individual you are managing is an NCP Choices program participant.

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

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

### To create an Objective Assessment Summary (OAS):

1. Select the **Plan** tab under Case Management Profile
2. Click the **Create Objective Assessment Summary** button. The **Objective Assessment – General Information Form** page displays (see figure below).

General Information	
User Name:	GCOSTANZA1+
User ID:	57120
State ID:	33995
* Program:	NCP
* Application ID:	12529
* LWIA:	Capital Area WF Board
* Office:	125 WF SOL Capital Area South
* Assessment Create Date:	02/20/2025  Today (MM/DD/YYYY)
Attach Active Plan:	<input type="radio"/> Yes <input checked="" type="radio"/> No
IEP ID #	
Age at Assessment	35

### Objective Assessment Summary Wizard – General Information Page

3. For **Program**, select NCP Choices.
4. Confirm the **Application ID**.
5. Confirm the **LWIA** information.
6. For Office, select **125 WF SOL Capital Area South**.
7. Select/maintain the **Today** link to enter the **Assessment Create Date**.
8. In the **Staff** section, enter/maintain today’s date for the assessment completion date.
9. Click **Next** to save your edits and continue to the Program Expectations page (see figure below).

## Program Expectations

The screenshot shows a web form titled "Program Expectations". At the top right of the form area is a question mark icon. The first question is "\* Are you seeking immediate employment" with radio buttons for "Yes" (selected) and "No". The second question is "\* What services are you seeking" with a text box containing "Training assistance and Employment Assistance". Above the text box is a warning: "Some HTML tags such as embedded videos are not allowed in this text box and will not be saved." Below the text box is a "[ Clear Text ]" link.

### Objective Assessment Wizard – Program Expectations Page

1. In the **Program Expectations** section:
  - i. Indicate whether the individual seeks immediate employment, select **Yes**.
  - ii. Record desired services in the text box, for example:  
**Training Assistance and Employment Assistance.**
2. In the **Employment Expectations** section:
  - i. Maintain as Occupation 1 the **Cooks, Restaurant** title.

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

- ii. If Occupation 1 displays a different title or doesn't have an occupation, click the **Select Occupation** link.
  - a. For **Keyword Search**, enter **Cook**. The related occupations appear.
  - b. Select **Cooks, Restaurant**.

- iii. Specify desired job attributes, such as employment type (**Regular**), full or part time (**Full Time (30 Hours or More)**), shift preferences (**1st**), desired salary (**\$24.00 hourly**), benefits needed (**Health Insurance**), etc.
  - iv. Select **Yes** for Desires Help in Career Planning.
  - v. Select **Yes** for Seeking Training Services.
  - vi. In the Training Preferences box, enter **Cook Training**.
3. Click **Next** to save your edits and continue to the **Education** page (see figure below).

## Education

**Education History**

Highest Grade Completed: High School Diploma

Currently Enrolled in School: No, Not Attending Any School

Education History Assessment Summary

[ Clear Text ]

## Objective Assessment Wizard – Education Page

1. In the Education History section:
  - i. Maintain/select **12<sup>th</sup> Grade Completed & Did not receive diploma or equivalent** Highest Grade Completed.

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

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

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

### Degree

Degree	Issuing Institution	Completion Date	Action
--------	---------------------	-----------------	--------

[Add a New Degree]

### Objective Assessment Wizard – Degree Page

1. Since the individual doesn't have a degree, click the **Next** button to proceed to the **Certificates** page (see figure below).

### Certificates

Certificate License	Organization	Completion Date	Action
---------------------	--------------	-----------------	--------

[Add a New Certificate]

### Objective Assessment Wizard – Certificate Page

1. Since the individual doesn't have any certificates, click **Next** to continue to the **Occupational Transferable Skills** page (see figure below).

## Employment

[General] [Expectation] [Education] [Degree] [Certificate] [Employment] [Household & Income] [Work Readiness] [Barriers] [Criminal Background] [Tests] [Referrals]

### 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.

Keyboard shortcut F10, toggles between editor toolbar and edit field.

Culinary skills  
Menu planning  
Catering preparation  
Staff management

[ Clear Text ]

### Objective Assessment Wizard – Occupational Transferable Skills Page

1. In the Occupational Transferable Skills section, in the **Summary of Skill Assessment** box, enter the following:
  - Culinary skills
  - Menu planning
  - Catering preparation
  - Staff management
2. In the Employment History section, previously entered employment in the individual’s profile should appear here.
3. Click **Next** to save your edits and continue to the Household & Income page (see figure below).

## Household & Income

### Household & Income

---

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

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

[Add a New Household Member]

**Household & Income Summary**

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

### Objective Assessment Wizard – Household & Income Page

1. If applicable, enter the Household & Income information.
2. 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.

### Objective Assessment Wizard – Work Readiness Page

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

i. **Dependent Care Needs**

- Not at this time

ii. **Transportation**

- Has a valid license
- Lacks Automobile Insurance
- Relies on Public transportation

iii. **Contacts**

- Telephone in home

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

i. **Resume**

- Resume Requires Revision

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

3. In the **Workplace Behavior Assessment Summary** box, enter:

- **Client is eager to become employed with higher earnings.**

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

## 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**
    - Lacks Medical Insurance Coverage
2. In the **Health & Behavior Observations Assessment Summary** box, enter the following:
  - Client does not have personal medical insurance.
  - Client experiences difficulty making a positive, strong first impression.
3. Click **Next** to save your edits and continue to the **Criminal Background** page (see figure below).

## Criminal Background

### Criminal Background

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

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

#### Arrests

**Arrests:**  No arrest record  
 Arrest Record  
 Pending Court Case

**Conviction:**  Convicted (adult)  
 Adjudicated (juvenile)

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

### Objective Assessment Wizard – Criminal Background Page

1. In the **Arrests** section, select the following check boxes:
  - **No arrest record.**
  - **None** for **Current status of arrest.**
2. Click **Next** to save your edits and continue to the **Tests** page (see figure below).

## Tests

### Tests

[Basic Skills Assessment](#)

[Other Testing](#)

**Aptitude**

**Career Interest**

**Testing Results Comments:**

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

Client is not basic skills deficient.

### Objective Assessment Wizard – Tests Page and Assessments Tab

1. In the **Testing Results Comments** box, enter:
  - Client is not basic skills deficient.
2. Click **Finish** to complete the OAS. The updated Plan tab redisplayes with the Objective Assessment Summary table.

## Exercise #14: Attendance Ribbon



**Objective:** Perform data entry to record attendance for an NCP Choices service.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to practice documenting the client's attendance.

### **To track attendance hours for a countable activity:**

1. From the Attendance ribbon, select the **Attendance Tracker** link.
2. Select the **Year** and **Month** of the activity you want to document from the drop-down lists or use the default current month and year. A table displays, listing all countable activities the individual was enrolled in within that time frame (see figure below).

Participation Period							
*Year: <input type="text" value="2025"/>							
*Month: <input type="text" value="February"/>							
*Select Activity:							
Activity/Provider	Actual Begin Date	Projected End Date	Actual End Date	Scheduled Hours	Assigned Hours	Actual Completed Hours	Total Hours Completed
<a href="#">051 - NCP Support Services - NCP Choices Test Provider</a>	2/18/2025	2/18/2025	N/A	3:00	N/A	0:00	0:00
<a href="#">512 - NCP Job Coaching - No Provider Information</a>	2/18/2025	2/18/2025	N/A	N/A	N/A	0:00	0:00
						<b>Total Combined Hours</b>	<b>0:00</b>

### List of Services with Countable Hours for Selected Month and Year

- The WorkinTexas site only has one option as an **Actual Hour Entry Type**, Daily. This opens the Daily ACH fields in the Daily ACH (Actual Completed Hours) column for editing.
- Select the link for the desired **Activity/Provider**. A calendar entry grid for tracking hours for the selected month/year will display below the activity list, and the selected activity is bolded.
- Entry boxes are enabled when the activity dates fall within the year and month selected above and scheduled hours have been previously set up on the Schedule tab of the enrollment wizard.
- On the calendar entry grid, you'll notice an open field where you can enter the attendance hours. Enter the attendance hours in the format hh:mm (00:00).
- Click the **Save Attendance** button to save the entered hours. If there are no invalid entries, the page will refresh with updates to totals shown for each week to the right, and for the month at the bottom.

8. To display a printable statement of the tracked hours in PDF format, click the **Print** button. The form includes areas for client and staff signatures. (To get back to the previous screen, select the back button on the browser.)

## Exercise #15: Add Employment Ribbon



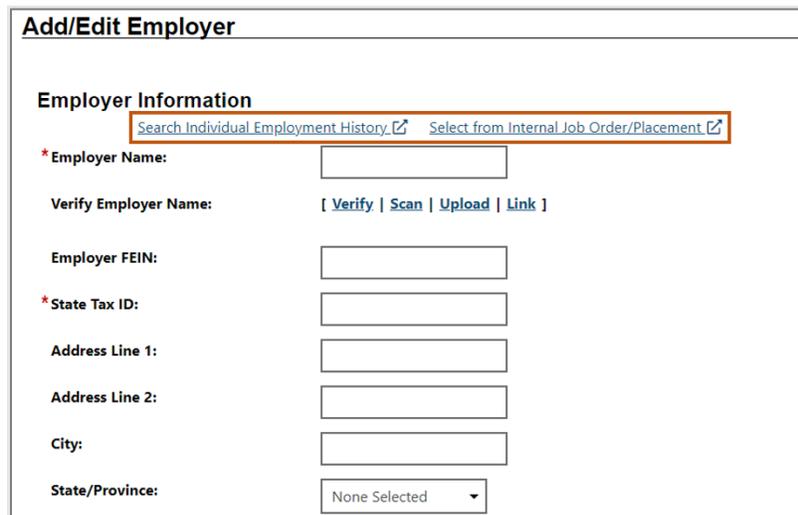
**Objective:** Document obtained employment.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to practice entering details of the individual's obtained employment in the WorkinTexas.com environment.

### To add new employment details:

1. Select the **Add Employment** link from the Add Employment ribbon. The **Add/Edit Employer** page displays (see figure below).



### Add/Edit Employer Page

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

- If any employment history or internal job placements were previously entered as part of their application for a program or the individual's Employment Plan activities, you can use links at the top of the Employer Information section to **Search Individual Employment History** or **Select from internal Job Order/Placement**.
3. For **Employer Name**, enter **Steakhouse House Restaurant** and select the restaurant from the list that appears. Various fields will prepopulate with the Steak House Restaurant information.
  4. For **State Tax ID**, enter **22334444**.
  5. For **Primary Employer Contact Name**, make up a name.
  6. For **Job Title**, enter **Cook**.
  7. For **Occupation**, click the **Select Occupation** link.
  8. In the **Keyword Search** field, enter **Cook**. A list will appear.
  9. Select **Cooks, Restaurant**.
  10. For **Is this a green job**, select **No**.
  11. For **Salary Frequency**, select **Year**.
  12. **For Salary Wage**, enter **45,000**.
  13. For **Job Start Date**, select today's date.
  14. For **Job End Date**, select the **Currently Employed** checkbox.
  15. Select **Yes** for the following:
    - Primary Employer

- Receiving Fringe Benefits
- Receiving Health Care Benefits
- Job Covered by Unemployment

16. Select **No** for the following:

- Is this Entrepreneurial and/or Self-Employment?
- Is this a Registered Apprenticeship?
- Is this active Military Service?
- Is this considered Non-Traditional Employment?

17. For **Is this considered Training Related Employment?**  
Select **No**.

18. Select **Yes** to **Add to Employment History**.

19. Click the **Save** button. The Add Employment ribbon  
redisplays, with the added employment record listed in a table  
(as shown below).

The screenshot shows a web interface titled "Add Employment" with a search bar and a table. The table has columns for Employer, Start/End Dates, City, and Action. One record is listed for "Steak House Restaurant" with start/end dates "02/17/2025 - Present" and city "Fort Stockton". The action column contains links for "Edit" and "Delete".

Employer	Start/End Dates	City	Action
Steak House Restaurant	02/17/2025 - Present	Fort Stockton	<a href="#">Edit</a> <a href="#">Delete</a>

### Employer List Table

**Note:** Once an Employer record is saved, you can edit and delete the record from the table. The information entered here will also carry over to the employment history section of the individual’s Background Wizard.

## Exercise #16: Credentials Ribbon



**Objective:** Record attained credentials.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to practice documenting credential attainment information.

### To record a new credential:

1. From the **Credentials** ribbon, select the **Create Credential** link. The **Case Credential** page displays.
2. In the **General Information** section, select the **LWDB/Region**: Capital Area WF Board.
3. For **Office Location**, select 125 WF SOL Capital Area South.
4. In the Credential Information section, for Credential Received, select **High School Diploma**.
5. For Credential Verification, select the **Verify** link to identify the document being used for Credential Verification and select **School Records**. Click the **Verify** link again to hide the list.
6. For **Date Credential Received**, select the **Today** link.
7. To associate this credential with a Training/Activity the individual has been enrolled in, click the **Search Activities/Services** link. A list of the participant's enrollments appears in a pop-up window (see figure below).

Activities List								×
Activity	Provider	Service/Course	Actual Begin Date	Projected End Date	Actual End Date	Completion Status	Action	
205 – Individual Employment Plan (IEP/EDP)	Sample Office Service Provider	205 - Individual Employment Plan (IEP/EDP)	08/30/2023	08/30/2023			<a href="#">Select</a>	
203 – Comprehensive Objective Assessment	Sample Office Service Provider	203 - Comprehensive Objective Assessment		08/30/2023			<a href="#">Select</a>	
153 – Workforce Services Orientation	Sample Office Service Provider	153 - Workforce Services Orientation	08/30/2023	08/30/2023			<a href="#">Select</a>	

[Close](#)

### Credential Activities List

- Click the **Select** link in the **Action** column for the activity/service that you want to associate.
- Click the **Save** button. The Programs tab redisplay, with the credential listed in the Credentials ribbon.

## Exercise #17: Case Transfer Ribbon



**Note:** This process is limited to the Capital Area and Rural Capital Area.

**Objective:** Create a case transfer request.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to practice how to create a case transfer request when an individual participating in the NCP Choices program moves to a different service delivery region.

**Note:** The case cannot be transferred to a different LWDB/Region if there are open activities. You must first close all open activities before transferring this individual.

### To create a case transfer request:

1. Click the **plus sign**  icon to expand the **Case Transfer** ribbon.
2. Select the **Create Case Transfer Record** link from the **Case Transfer** ribbon. The **Case Transfer Record** page displays.
3. For the **LWDB/Region Transfer Request being made to** select **Panhandle WF Board**.
4. In the **LWDB/Office Transfer Request being made to** select 601 WF Solutions Panhandle.

5. In the **Staff to be notified of Transfer Request** drop-down menu, select the name of the staff member.
6. For the **Reason for Transfer**, select the check box for **Relocation out of region**.

**Note:** If you select **Other (Please Explain)**, then another field will open requiring you to explain the reason.

7. Enter additional comments into the comments field as necessary.
8. Select the **Save** button. The Case Transfer Notice is sent to the selected staff member in the receiving region and the Programs tab redisplay with the record added in the Case Transfer ribbon.

Case Transfer
1

[Create Case Transfer Record](#)

Search

Create Date	Create Staff	Transfer From	Transfer To	Last Edit Date	Edit Staff	Action
02/18/2025	Chris Cekan	Capital Area WF Board	Capital Area WF Board			<a href="#">Edit</a>

Page 1 of 1
Rows: 10

**Case Transfer Table Displaying Transfer Record**

## Exercise #18: Closure Ribbon



**Objective:** Close all services and create closure form.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to practice closing all services, closing goals and objectives for the IEP, and practice creating the closure form.

### To close a service:

1. Open the **Activities / Enrollments / Services** ribbon. The Activity / Enrollments / Services table displays all the services.
2. The first step is to close out all open services from the Activities/Enrollments/Services ribbon. Open activities have an **O** icon in the **Status** column.
3. To close a service, select the **Close** link in the **Actual End Date** column for the desired activity. The **Closure Information** tab displays.
4. To enter the Last Activity Date (mm/dd/yyyy), select **Today**.
5. For Completion Code, select **Successful Completion**.
6. Click the **Finish** button. The Programs tab redisplay with the activity status closed (The **Status** icon for the activity should now be orange) in the Activities/Enrollments/Services ribbon

of the NCP Choices program. The Actual End Date Column will also display the close date along with the Completion Code.

7. Repeat the steps above until all open services are closed.

**Note:** If there are open services while you're trying to perform a closure, an error message will display at the top of the page stating, **Open activities exist. Unable to create closure.**

- Open activities exist for this Adult Education application. Unable to create closure.

### Open Activities Error Message

## Closing IEP Objectives and Goals

Next, we also need to close the IEP Goals and Objectives.

**Note:** Remember, you must work from right to left 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.

### To close Objectives or Goals for the assisted individual:

1. Select the **Plan** tab. The **Case Management – IEP/ISS** page will display.
2. Open the plan by selecting the **Edit** link in the **Action** column. The Plan tab of the IEP displays.
3. Click the **Objectives** tab to close all open objectives.
4. To close an objective, select the **Edit** link under the Action column.

5. In the **Objective Information** section, enter the **Actual Completion Date** by selecting the **Today** link.
6. For **Completion Status**, select **Closed**.
7. For **Reason Closed**, select **Successful**.
8. Add a comment, if desired, then click **Save**. The tab redisplay with the **Closed** status.
9. Repeat the above steps until all the objectives are closed.
10. Once all the objectives are closed, select the **Goals** tab to close all open goals.
11. To close the Goal, select the **Edit** link under the **Action** column.
12. In the Goal Information section, enter the **Actual Completion Date** by selecting the **Today** link.
13. For Completion Status, select **Closed**.
14. For Reason Closed, select **Successful**.
15. Add a comment, if desired, then click **Save**. The Goal redisplay with the Closed status.
16. Once all the services, goals, and objectives of the IEP are closed, return to the Programs tab by selecting the **Exit Wizard** link, then select the **Programs** tab.

**To create a Closure Record:**

1. Open the **Closure** ribbon and select the **Create Closure** link.
2. From the **Closure Reason** drop down menu, select **Met Retention**.
3. For **Entered Employment**, select **YES**.
4. Since we already added the employer earlier, that employer is already listed in the **Case Employment History** table. However, if we didn't add the employer, then we can add the employer by selecting the **Add Employer** link.
5. To complete the Closure form, click the **Save** button. The Programs tab redisplay, with the closure link changed to **Edit Closure**, along with the **Closure Date**.

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

## Exercise #19: Exit / Outcome Ribbon



**Objective:** Manually exit the customer.

**Assumption:** You have the NCP Choices customer's account and Programs tab already open in WorkinTexas.com.

**Purpose:** This exercise is to practice creating this form to create a hard exit in the WorkinTexas.com system.

**Note:** Only in rare specific circumstances will you use this method to exit a customer.

### To manually exit the customer:

1. From the **Exit/Outcome** ribbon, select the **Create** **Exit/Outcome** link. The **NCP Exit Outcome Page** displays (see figure below).

<b>General Information</b>	
<b>Login Name:</b>	JCARREY1+
<b>User ID:</b>	25492
<b>State ID:</b>	37913
<b>Name:</b>	Jim Carrey
<b>Date of Last Service:</b>	02/18/2025
<b>* LWDB:</b>	None Selected
<b>* Office Location:</b>	125 WF SOL Capital Area South
<b>* Staff Position:</b>	Staff
<b>Exit Information</b>	
<b>* Exit Date:</b>	02/18/2025  Today (MM/DD/YYYY)
<b>* Exit Reason:</b>	Transferred to a new Court Order

### Exit / Outcome Ribbon

2. Confirm or enter the **LWDB**, **Office Location**, and **Staff Position** information.
3. Enter the **Exit date** (mm/dd/yyyy).
4. For **Exit Reason**, select **Transferred to a new Court Order** from the drop-down menu.
5. Select the **Save** button.

**Note:** Because the WorkinTexas.com 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, WIOA, and/or Choices.

## Exercise #20: NCP Choices Reports



**Objective:** Review the three different NCP Choices reports.

**Purpose:** This exercise is to practice accessing and creating NCP Choices reports.

### To access report 1 (Attendance Record Summary Report):

1. Click the tribar or Menu link to open the left navigation menu.
2. Scroll down to the **Report** section and select the right pointing arrow for **Detailed Reports**. The Detailed Reports left navigation menu opens.
3. Select **Case Management – Program Specific** from the list. The Reports page opens displaying the different Case Management – Program Specific reports.

#### ▼ Case Management - Program Specific

Reports grouped by a specific federal or local program containing detailed information unique to that program.

▶ **Choices (TANF)**

Reporting for transition programs from assistance toward employment displaying data on participation, activities, enrollments and services.

▶ **Generic Programs**

This report lists participants in one of the system's Generic programs scheduled to exit the program within a specified period.

▶ **SNAP Employment and Training**

Reporting for the Supplemental Nutrition Assistance Program, displaying data on enrollment, user counts, case assignment, and 583.

▶ **Trade Adjustment Assistance (TAA)**

Trade reports displaying data on participants, petitions and petition number, TAA follow-up, and more.

▶ **Wagner-Peyser**

Reporting for Wagner-Peyser displaying data for ineligible applications, and participant tracking by layoff date and employment entered by assistance or self-service.

▶ **WIOA Title I**

Reports organized by specific federal WIOA program groups displaying detailed data unique to WIOA programs.

▶ **WIOA Youth**

Reporting for WIOA Youth program participation and services.

## Case Management - Program Specific Menu

4. Select **Non-Custodial Parent Choices (NCP)**. The NCP Choices reports expand below.
5. Select the **Attendance Record Summary** link.
6. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
7. Click the **Run Report** button. The report details page appears.
8. Click the **Select Another Case Management – Program Specific/Non-Custodial Parent Choices (NCP) Report** button. This brings you back to the main **Reports** page.

**To access report 2 (Case Load Detail Report):**

1. Scroll down to **Non-Custodial Parent Choices (NCP)** ribbon.
2. Select the **Case Load Detail** link.
3. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
4. Click the **Run Report** button. The report details page appears.
5. Click the **Select Another Case Management – Program Specific/Non-Custodial Parent Choices (NCP) Report** button. This brings you back to the main **Reports** page.

**To access report 3 (Case Load By Zip Code Report):**

1. Scroll down to **Non-Custodial Parent Choices (NCP)** ribbon.
2. Select the **Case Load By Zip Code** link.
3. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
4. Click the **Run Report** button. The report details page appears.
5. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

**To access report 4 (Timeliness of Data Input Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Case Management** ribbon.
3. Select the **Case Status** ribbon.
4. Select the **Case Load** ribbon.
5. Select the **Timelines of Data Input** link.
6. Under **Program** criteria, select **Non-Custodial Parent Choices (NCP)**.
7. Scroll down to the **Date** criteria and select **Last 12 months** for **Date Range**.
8. Click the **Run Report** button. The report details page appears.
9. Click the **Select Another Case Management/Case Status Report** button. This brings you back to the main **Reports** page.

**To access report 5 (Obtained Employment Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Case Management** ribbon.
3. Select the **Case Status** ribbon.
4. Select the **Case load** ribbon.
5. Select the **Obtained Employment** link.
6. Under the **Program** criteria, select **Non-Custodial Parent Choices (NCP)**.
7. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
8. Click the **Run Report** button. The report details page appears.
9. Click the **Select Another Case Management/Case Status Report** button. This brings you back to the main **Reports** page.

**To access report 6 (Days Since Last Active Service Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Case Management** ribbon.
3. Select the **Case Status** ribbon.
4. Select the **Case load** ribbon.
5. Select the **Days Since Last Active Service** link.
6. Click the **Run Report** button. The report details page appears.
7. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

**To access report 7 (List Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Services** ribbon.
3. Select the **Services Provided Individual** ribbon.
4. Select the **Service** ribbon.
5. Select the **List** link.
6. Under the **Program** criteria, select **Non-Custodial Parent Choices (NCP)**.
7. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
8. Click the **Run Report** button. The report details page appears.
9. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

**To access report 8 (Case Notes - Individual Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Case Management** ribbon.
3. Select the **Documentation** ribbon.
4. Select the **Case Notes** ribbon.
5. Select the **Individual** link.
6. Under the **Program** criteria, select **Non-Custodial Parent Choices (NCP)**.
7. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
8. Click the **Run Report** button. The report details page appears.
9. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

**To access report 9 (Exited Cases Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Case Management** ribbon.
3. Select the **Case Status** ribbon.
4. Select the **Case load** ribbon.
5. Select the **Exited Cases** link.
6. Under the **Program** criteria, select **Non-Custodial Parent Choices (NCP)**.
7. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
8. Click the **Run Report** button. The report details page appears.
9. Click the **Select Another Case Management/Case Status Report** button. This brings you back to the main **Reports** page.

**To access report 10 (Training Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Case Management** ribbon.
3. Select the **Case Status** ribbon.
4. Select the **Case load** ribbon.
5. Select the **Training** link.
6. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
7. Click the **Run Report** button. The report details page appears.
8. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

**To access report 11 (Management Summary Report):**

1. Scroll down and select the **Summary Reports** ribbon.
2. Select the **Executive** ribbon.
3. Select the **Program Management** ribbon.
4. Select the **Management Summary** link.
5. Under the **Program** criteria, select **Non-Custodial Parent Choices (NCP)**.
6. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
7. Click the **Run Report** button. The report details page appears.
8. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

**To access report 12 (Fund Management by Participant Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Financial** ribbon.
3. Select the **Fund Management** ribbon.
4. Select the **Case Manager** ribbon.
5. Select the **by Participants** link.
6. Click the **Run Report** button. The report details page appears.
7. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

**To access report 13 (Case Closure Information Report):**

1. Scroll down and select the **Detailed Reports** ribbon.
2. Select the **Case Management** ribbon.
3. Select the **Case Status** ribbon.
4. Select the **Case load** ribbon.
5. Select the **Case Closure Information** link.
6. Scroll down to the **Date** selection criteria and select **Last 12 months** for **Date Range**.
7. Click the **Run Report** button. The report details page appears.
8. Click the **Select Another Case Management/Case Status Report** button. This brings you back to the main **Reports** page.