WorkinTexas.com Apprenticeship Case Management Training Guide

GSI Training Guide

Approved by the

Texas Workforce Commission

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

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Contents

Apprenticeship Program: Case Management Training

Course Objectives

After completing this course, you will be able to:

- Apply terms, business concepts and program features to navigate correctly and efficiently the WorkinTexas.com (WIT) Workforce Case Management System.
- Perform system registration on behalf of program participants.
- Search for and assist system-registered individuals.
- Complete an apprenticeship program application.
- Complete a participation record.
- Provide program services to Apprenticeship program participants.
- Perform data entry to document the skills gained by program participants.
- Document credentials the participant attained in the program.

- Perform ancillary staff responsibilities as needed, e.g., manage case notes, communications, and assessments on behalf of program participants, and provide and data enter supportive services
- Exit the participant from the program.
- Learn the follow-up documentation process.
- Where to access and run apprenticeship reports.

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.

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

Glossary of Terms

Throughout the Apprenticeship case management training you will receive, we will reference the following terms:

- **Individual or Job Seeker** – Terms used interchangeably to describe a person who receives program services.
- **Applicant** – An Individual for whom program eligibility determination has yet to be determined.
- **Participant** – A program applicant who is actively receiving program services.
- **Staff** – Synonymous with case manager or workforce agency employee, a program expert who manages service delivery for program participants.
- **Assist** – Following system registration, staff can access a customer's profile by selecting **Manage Individuals >**

Assist an Individual to manage the customer's information.

- **Currently Managing** – The section located within staff's left navigation menu that displays the name of the individual (or employer) whose account the staff user is currently managing.
- **Left Navigation Menu** – The list of staff user options staff access by selecting the **Menu** hyperlink at the top left center portion of the WorkinTexas.com screen.
- **Release Individual** – A hyperlink command displayed in the Currently Managing section that when selected, enables staff to stop assisting the current individual (or employer).
- **Ribbons** – The panels or containers displayed on the Programs tab screen for each program that maintain specific program details such as program services.
- **Widgets** – Quick links to specific information that are commonly used and easily accessed from the Staff dashboard. The job seeker and employer dashboards also have corresponding widgets. Widgets can be configured and customized by the staff member, job seeker or employer.
- **Wizard** – A step-by-step guide for completing a process in WorkinTexas.com, such as a program application form to determine program eligibility.
- **Dashboard** – Primarily used as the landing page, or the first page displayed upon Log In. The dashboard is a quick

way for staff members to view common items and information through widgets.

- **Enrollments** – A term synonymous with program activities or services provided to a program participant.
- **Registration** – A term with dual meaning. System Registration is how an individual (or staff user on their behalf) creates an account profile, while Program Registration refers to completion of the program application form.
- **Authorized Staff** – Staff users whose privileges enable them to perform specific functions in the system.
- **Case Assignment** – The process by which an individual is assigned to a specific case manager or a group of case managers for the purpose of receiving specialized assistance.
- **Business Rule** – In software development, a **logic qualifier** usually in the form of an **If-Then** clause that enforces local, state, and federal regulatory requirements.
- **Document Management** – The process by which staff obtain client documents electronically and add them to the client's account profile.
- **Remote Signature** – The ability to affix required signatures digitally on various program forms on behalf of staff, the individual, and others as needed.

- **Case Note** – Staff-entered documentation that provides a fact-based description of an individual’s interaction with WorkinTexas.com.

About the Apprenticeship Program Module

The Apprenticeship Program module enables staff to perform apprenticeship program related tasks such as creating an individual registration, gathering of application information to complete the program application, record participation, document services as well as skills and credentials gained in the program. The Apprenticeship module helps staff guide the participant through the entire process, providing all the necessary case management tools to manage an individual's case progress, from enrollment to exit.

Getting Started: Staff Login

To manage service delivery to individuals through the Apprenticeship program, staff must first log in to the WorkinTexas.com system.

Note: Staff users do not create their own accounts. The System Administrator creates and manages staff accounts, staff logins, staff privileges, and Workforce Area assignments.

The production environment uses a **single sign-on** approach which enables you to use the same login credentials for other Workforce applications. The staff training login is generic and applies to the training environment only.

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

1. Access the Home page according to the trainer's directions.
2. Click Sign In / Register.
3. Enter your assigned Username.
4. Enter the Password provided by the trainer.
5. Select I'm not a robot checkbox for reCAPTCHA, if applicable.
6. Click the Sign In button.
7. Review Staff Sign-in Notice text.
8. Click I agree.

Message Prompt

When any user type enters the WorkinTexas.com system, they will be presented with a New or Unread Message prompt like the following figure if they have at least one qualifying message:

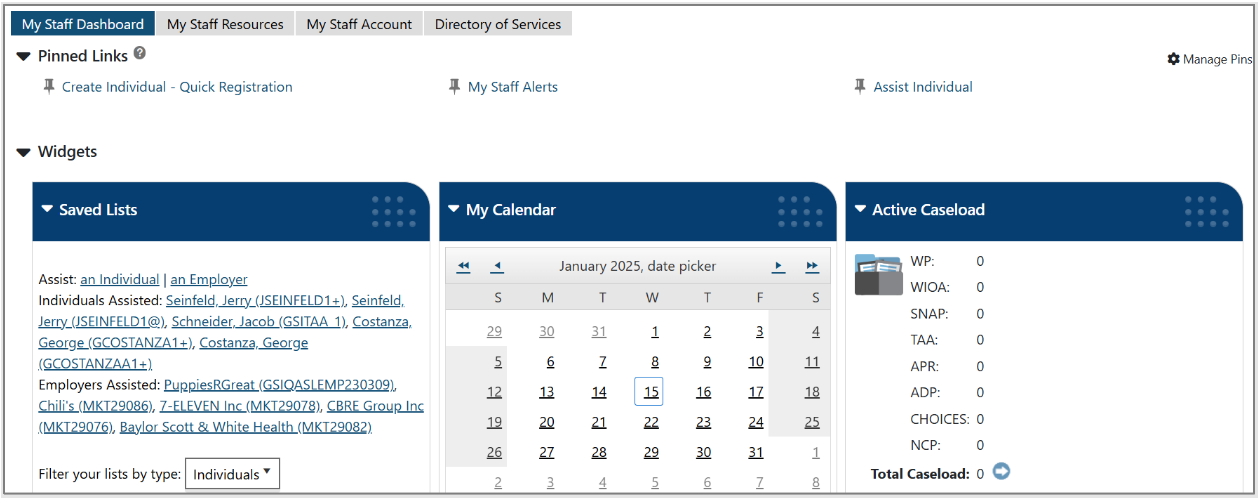
Fixed the alt text information.

New or Unread Message Prompt

Staff may access their Message Center inbox by selecting the hyperlink text (or the envelop icon) or click the Close button to view their message(s) later. For more information, see the System Overview training video.

My Staff Dashboard

By default, the WorkinTexas.com system will display My Staff Dashboard, as shown in the sample figure that follows.



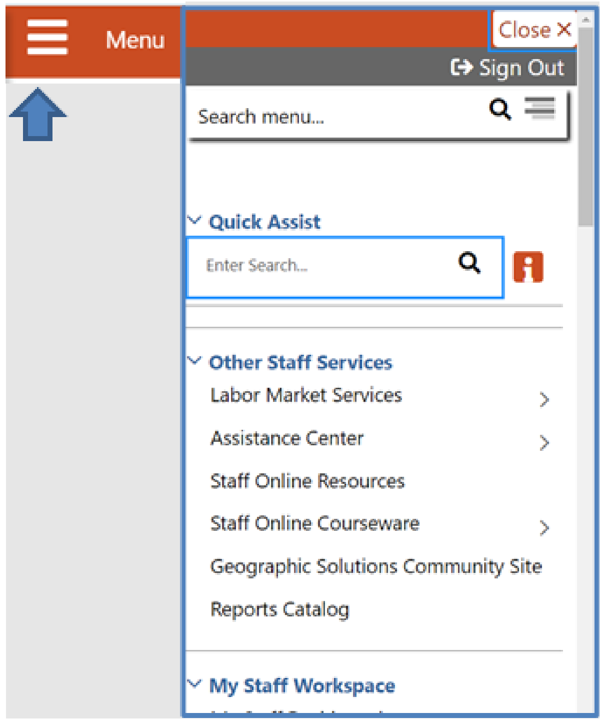
My Staff Dashboard, Excerpt

This feature is a quick way for staff members to view common items and information through widgets as soon as they log in. Widgets provide quick visual access to information that is also available through links or selections within the system. Staff can configure widgets to display at the top of the home screen. For more information, see the System Overview video.

Left Navigation Menu

The following left side-bar menu groups and headings are located under the Menu icon on the top left side (see figure below) of the WorkinTexas.com page.

Note: The order in which staff menu options display may vary. To edit the display, go to the **My Staff Account** tab and scroll down to the **Preferences section**. Find Menu Preferences and then select **Menu Configuration**.



Left Side-Bar Menu

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

My Staff Workspace

- **My Staff Dashboard** - Landing page when logged on to WorkinTexas.com that consists of Widgets.
- **Quick Assist** - The Quick Assist is available at the top of the left side-bar menu and is based on the last four digits of an individual's SSN, last name, an employer's company name or Federal Employer Identification Number (FEIN), or other criteria.
- **Other Staff Services**
    - **Labor Market Services** - View information about labor markets in your state.

    - **Assistance Center** - Find general site use information such as Quick Reference Cards.

    - **Staff Online Resources** - Develop and maintain a directory of staff member resource information using the Content Management tool in Admin.

    - **Staff Online Courseware** - Access numerous professional online training videos and courses developed for workforce staff members.

    - **Geographic Solutions (GSI) Community Site** - GSI is the vendor for the new WorkinTexas.com software. The community site is a portal to share software **best practices** and to stay current with events and news pertinent to a specific region, state of the U.S. labor market, and GSI product releases.

- **My Staff Workspace** – General tools for staff to communicate and set preferences.

  - **My Staff Resources** - Provides links to tools commonly used by staff. These include:

    - **Correspondence** - View and manage letters that you have created.

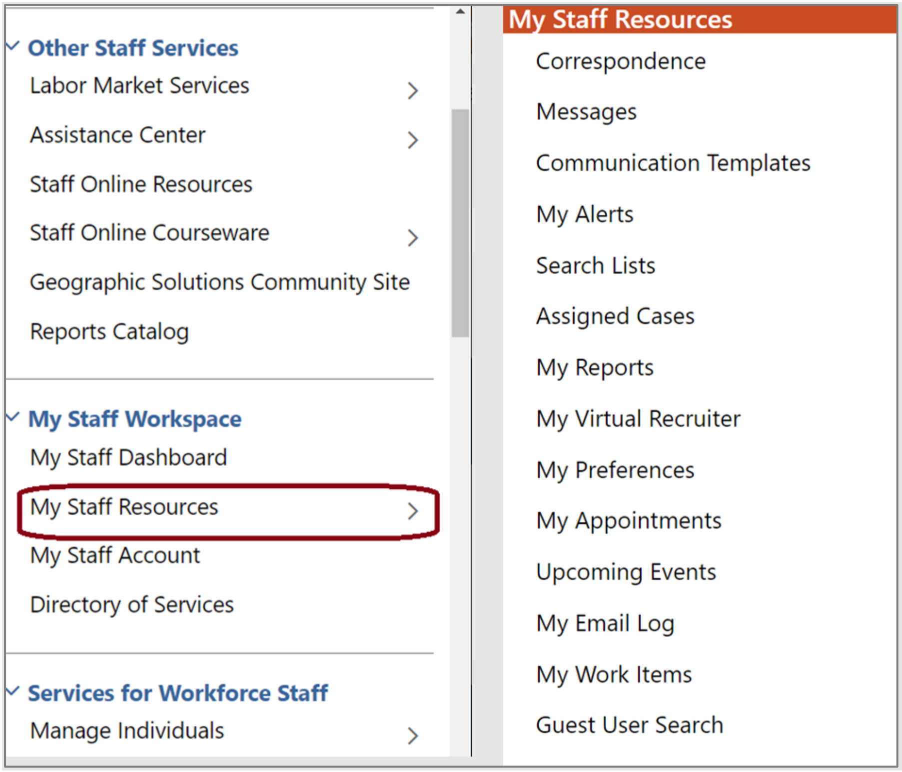
    - **Messages** - View and manage your messages.

    - **Communication Templates** - View communication templates that you may have created.

    - **My Alerts** - View set alerts.

    - **Search Lists** - View saved search lists.

- **Assigned Cases** – List of individuals currently assigned to you.
- **My Reports** - View any saved reports.
- **My Virtual Recruiter** - View and manage Virtual Recruiter scheduler for recurring searches for job openings or candidates.
- **My Preferences** - Change the interface settings and user experience.
- **My Appointments** - View and manage scheduled appointments.
- **Upcoming Events** - View and manage upcoming events.
- **My Email Log** - View and manage emails sent or received via the system.
- **My Work Items** - For case management, this heading is not currently used.



Staff Left Side-Bar Menu - My Staff Resources

- **My Staff Account** - Provides information on how your staff account is configured, including basic login, name, address, phone and email. Other options include:
    - **Office** - Workforce region and office to which you are assigned.
    - **Preferences** - Adjust system default settings for interface screens including alerts, landing pages for assisting individuals and employers, case note sort orders, and menu preferences for summary and detail landing pages. The Left Navigation Menu can also be configured here.

- **Staff Signature**- Maintains a digital copy of the signature you created using your mouse.

- **Directory of Services** - A consolidated list of the left side- bar menu groups and functions including Services for Workforce Staff, Reports, Customer Relationship Management, Communications, Templates, Document Management, Schedules, and Other Staff Services.

Services for Workforce Staff

- **Manage Individuals**
    - **Create an Individual** - Create an individual user account.
    - **One Case Note to Multiple Individuals** - Create one case note to distribute to multiple individuals accounts.
    - **Assist an Individual** - Assist an existing individual account.
    - **Upload Rapid Response Individuals** – Select this option to upload a Rapid Response workbook.
- **Manage Employers**
    - **Create an Employer** - Create an employer user account.
    - **Assist an Employer** - Assist an existing employer account.

  - **Employer Access Rights** - Modify the employer's access to the system through setting access rights.
  - **Employers Posting Jobs** - Review jobs from internal and external employers.
  - **Local Employer Sites** - Review company profiles from the Data Axle database.
    - **One Case Note to Multiple Employers** - Create one case note to distribute to multiple employer accounts.
- **Manage Resumes**
  - **Create a Résumé** - Create a candidate résumé in the system.
  - **Search for Résumés** - Search for candidate résumés within the system.
  - **Match Resumes to Jobs** - Perform a search for jobs using criteria from a résumé.
  - **Candidate Referrals** - Create a candidate referral based on job search.
- **Manage Job Orders**
  - **Create an Internal Job** - Create or manage internal jobs.
  - **Search for Internal Job** - Search for an existing internal job order.

    - **Search for All Jobs** - Search for internal or external jobs.
- **Manage Labor Exchange**
    - **Mass Job Referrals** - Create job referrals for individuals.
    - **Mass Candidate Referrals** - Create candidate referrals for employers.
    - **Enter Referral Results** - Enter job referral results.
    - **Referrals Pending Review** - Manage pending referrals to suppressed jobs.
    - **Job Candidate Follow-up** - Manage follow-up referrals.
    - **Job Skill Sets** - Manage custom job skill sets.
    - **External Job Options** - Manage criteria to control the display of external jobs in the system.
- **Manage Activities**
    - **Individual Services** - Manage service plan data for individuals.
    - **One Service to Multiple Individuals** - Create one service for distribution to multiple individuals.
    - **Employer Services** - Manage service plan data for employers.
    - **Event Rosters** - Manage the events roster for registered event participants.

    - **One Service to Multiple Employers** - Create one service for distribution to multiple Employers.
    - **Scheduled Services** - Displays a list of schedules and services for a specific date, office and service.
    - **Events** - Create events, add participants and manage the events calendar for system users.
- **Manage Providers** – Create and manage training and service provider accounts.
- **Manage Case Assignment** – Individual Case Assignment and Employer Case Assignment.
- **Manage Funds** – Individual Fund Tracking (IFT) module to track fundable services and manage the budgets that support them.
- **Manage WARN Notifications**
    - **Create WARN Notice** – Create a new WARN notice, entering information received from the employer, and send the official notice to any of the appropriate parties.
    - **Search for WARN Notices** – Select this option to view existing WARN notifications in the system.
    - **Partially Completed WARN Notices** – Select this option to view a list of partially completed WARN notices.
    - **Create WARN Visit Record** – Create a record for a WARN planning or orientation visit. Search WARN

information to populate information from an existing notification or manually enter new visit details.

- **Search for Visit Records**

- **Manage Surveys** - Access to preview, edit, and manage active surveys.
- **Manage Online Forms** - Allows staff to create and fill out forms on the individual's or employer's behalf.

Reports – This group of reports offers multiple ways to access, generate and save standard and customized workforce reports.

Customer Relationship Management (CRM) - Offers Employer Outreach Specialists and Business Services Representatives the tools and resources to actively manage employer recruitment efforts, convert potential business customers into Marketing Leads for the purpose of aiding these businesses, and to track the profile details they manage on behalf of these potential recruiting employers.

- **Create a Marketing Lead** - Access and complete a mini-registration for a potential employer recruit.
- **Contacts List** - Displays all primary and secondary contacts from when Marketing Lead employers were created.
- **Marketing Leads** - Displays all primary contacts from when Marketing Lead employers were created.
- **Outreach Campaign(s)** – Manage outbound Outreach marketing campaigns.

- **Work Items** - For case management, this heading is not currently used.
- **Appointments** - Create or view a list of existing appointments.
- **Online Surveys** - Create new survey forms and display all current forms (surveys) created within the CRM module.

Communications - Tools used for communicating with individuals and/or employers:

- **Messages** - Manage messages sent or received with your login.
- **Correspondence** - List letters you saved in the system.
- **Alerts** - Manage staff alerts and text watches on behalf of your customers.
- **Virtual Recruiter** - Set up and manage recurring job and résumé searches.
- **Email Log** - View emails you sent or received.

Communication Templates

- **Templates** - Review the system-generated correspondence templates or review, create, and modify your own templates for use in their correspondence and messages.
- **Job Order Skill Sets** - Create or modify detailed skill sets to find candidates for job openings.
- **Job Order Templates** - Create and manage templates for job orders.

- **Case Note Templates** - Create and manage templates for case notes.
- **Search List** - Manage your saved search lists for individuals and employers.
- **Program Enrollment Templates** – Select this option to manage program enrollment templates.

Schedules

- **Appointment Calendar** - Create and manage appointments.
- **Events Calendar** - View and create upcoming events, track attendees.
- **Event Rosters** - Displays event information per office.
- **Staff Availability** – Create and manage staff schedule and availability.

Document Management

- **Search Documents** - Search for electronic documents stored in the system, which have been uploaded and attached to an individual's account portfolio.

Apprenticeship Client System Registration

Training Objectives

After completing this module, you will be able to:

- successfully navigate to **Manage Individuals > Create an Individual,** when tasked with assisting individuals with system registration.
- understand what it means to be a **registered individual**.
- recognize questions that are required versus optional.
- understand questions defined as conditional that may require additional questions to be completed based on participant answers.
- successfully complete system registration for the individual.

Note: Each Apprenticeship participant must have a registration before completing an Apprenticeship application.

If an Apprenticeship program participant does not have a WorkinTexas.com account profile, their case manager will assist them with creating one.

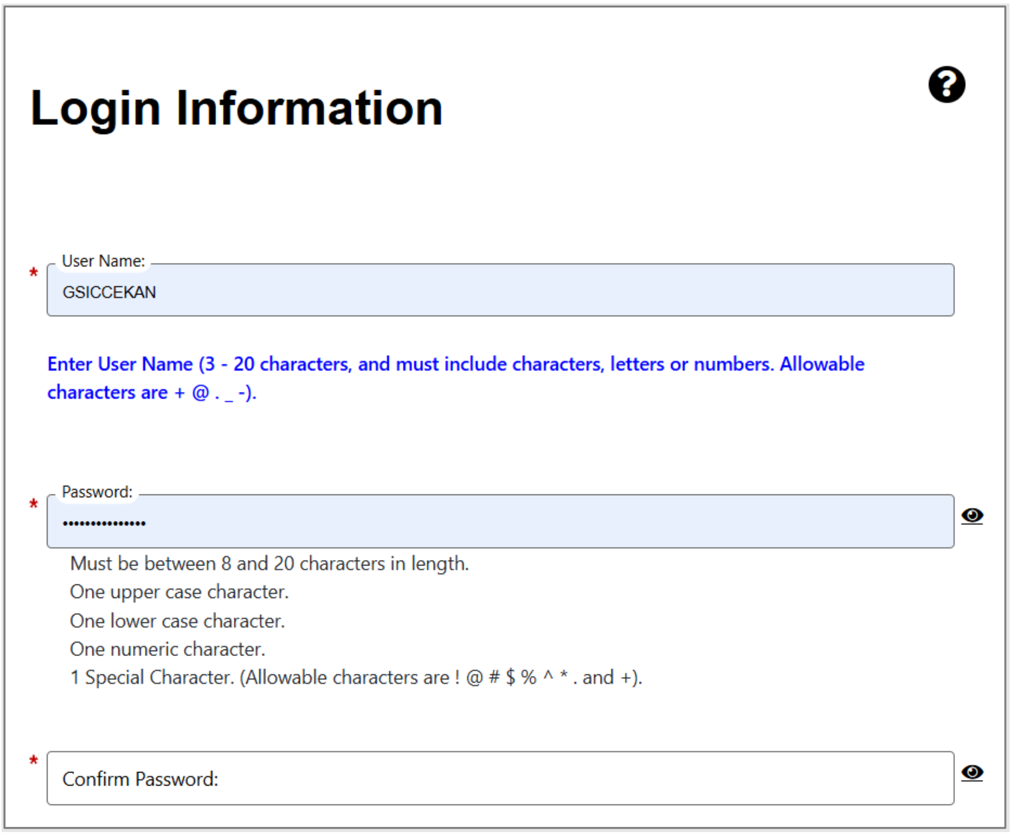
Note: Fields marked with a red asterisk (*) are required.

To create an individual account:

1. From the left navigation menu, under the **Services for Workforce Staff** menu group, click Manage Individuals > Create an Individual.

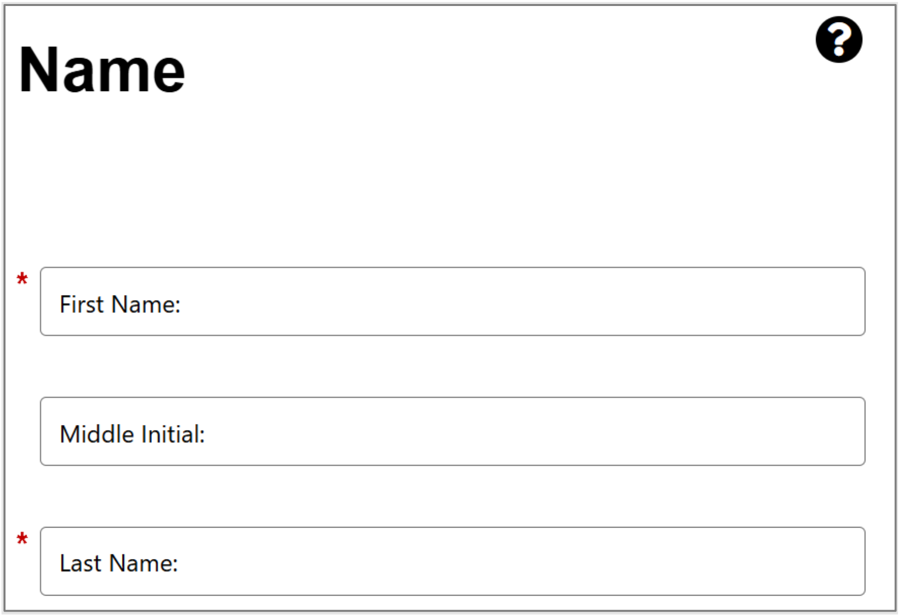
2. Complete the **Login Information** section to enter the individual’s desired **Username** and **Password** for system login purposes. Re-enter the password again for confirmation.

3. Choose a **Security Question** the individual desires and enter a response.



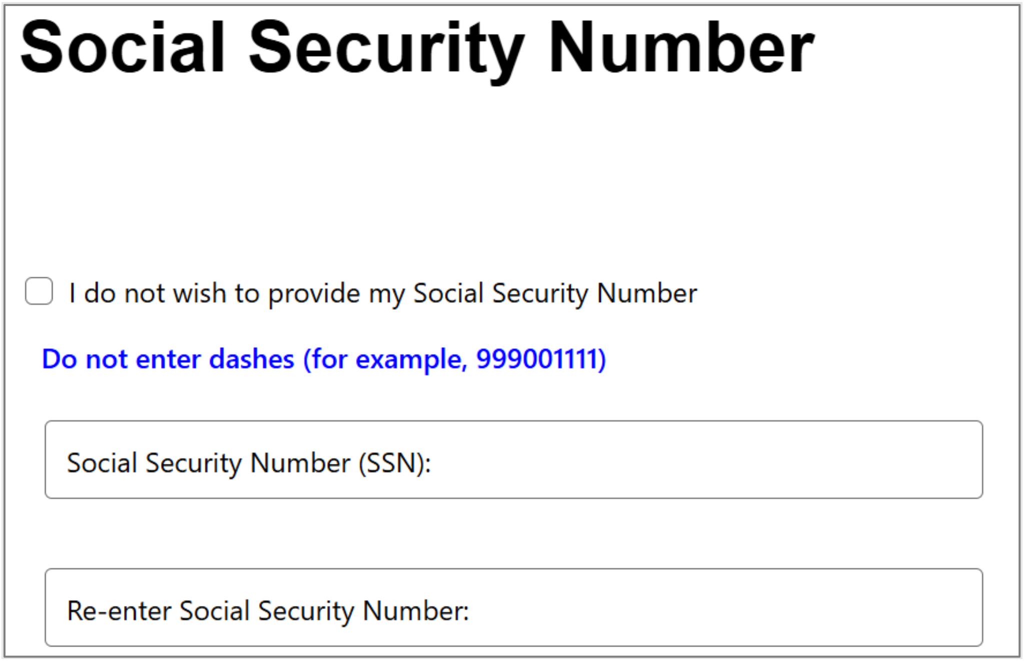
Login Information Section of Create Individual Account Process

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



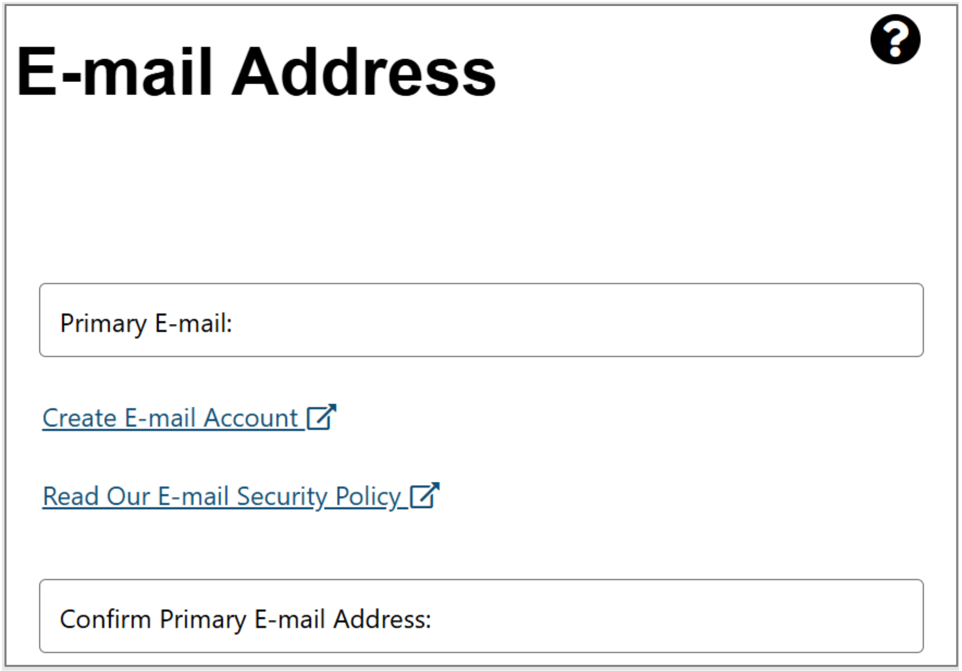
Name Section of Create Individual Account Process

5. In the **Social Security Number** section, enter the individual's unique nine-digit number and re-enter it. If the individual fails to provide their Social Security Number (SSN), select the "**I do not wish to provide my Social Security**" checkbox.



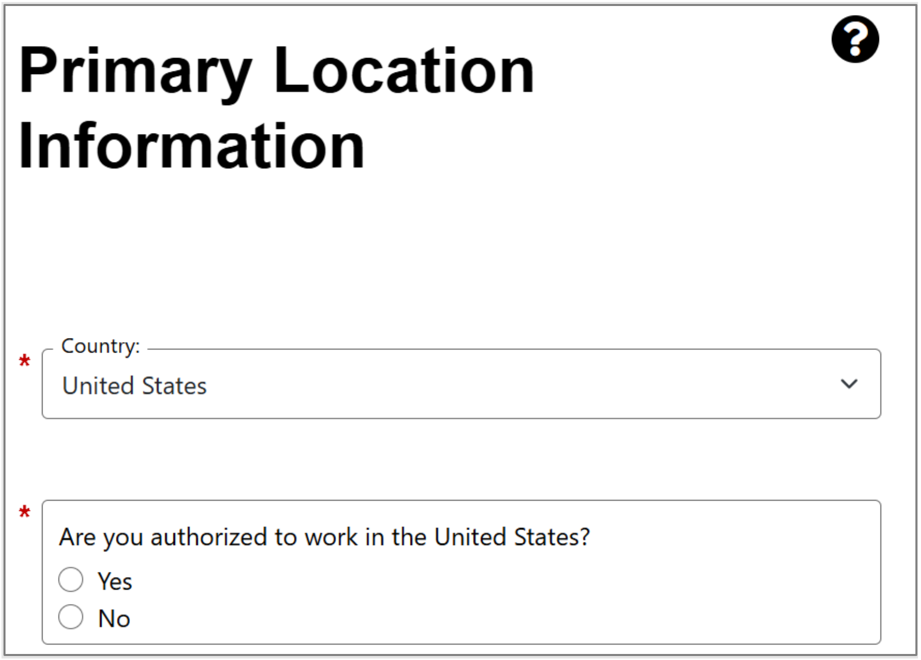
Social Security Number Section of Create Individual Account Process

6. In the **Phone Number** section, enter the individual’s primary phone number.
7. In the **E-mail Address** section, enter the individual’s primary email address and re-enter it in the Confirmation text box.



Email Address Section of Create Individual Account Process.

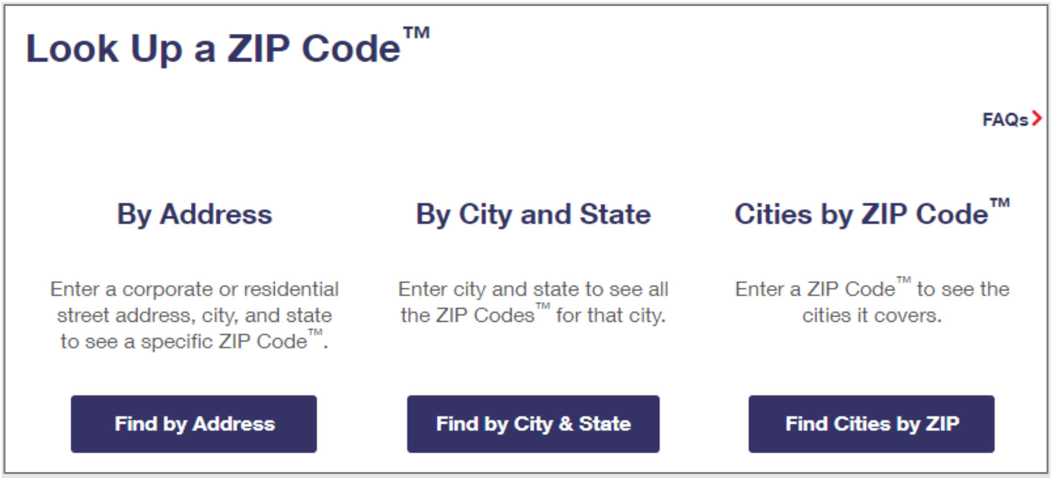
8. In the **Primary Location Information** section, select the individual’s country of residence and select whether they are authorized to work in the U.S.



Primary Location Information Section of Create Individual Account Process

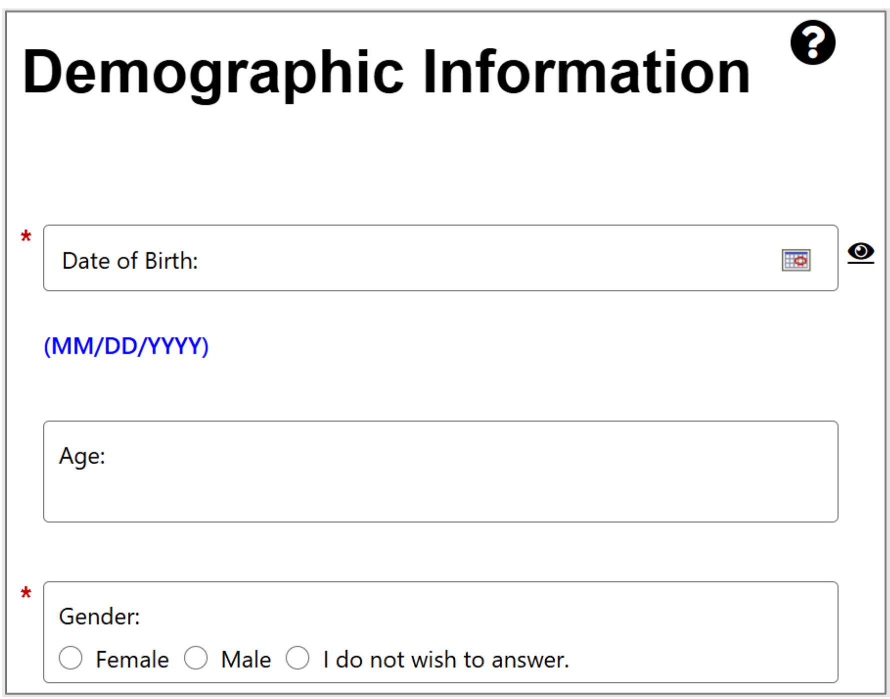
9. In the **Residential Address** section, select whether the individual is homeless and enter their address details accordingly. If the individual's mailing address differs, select the **Mailing address is different** checkbox to indicate this, and enter the individual's mailing address in the fields displayed.

Note: If unsure of the individual's **ZIP Code**, select the **Find zip code** link to access a search screen from the U.S. Postal service, as shown in the figure that follows.



USPS Zip Code Look Up Webpage

10. In the **Demographic Information** section, enter the individual's date of birth and select their gender. (Optional) Select their Foster Care status.



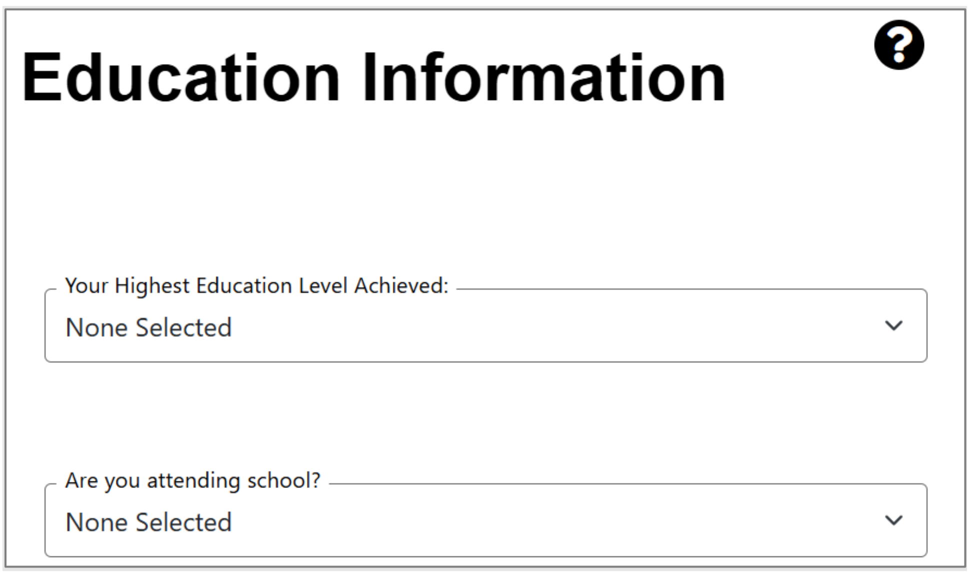
Demographic Information Section of Create Individual Account Process

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

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

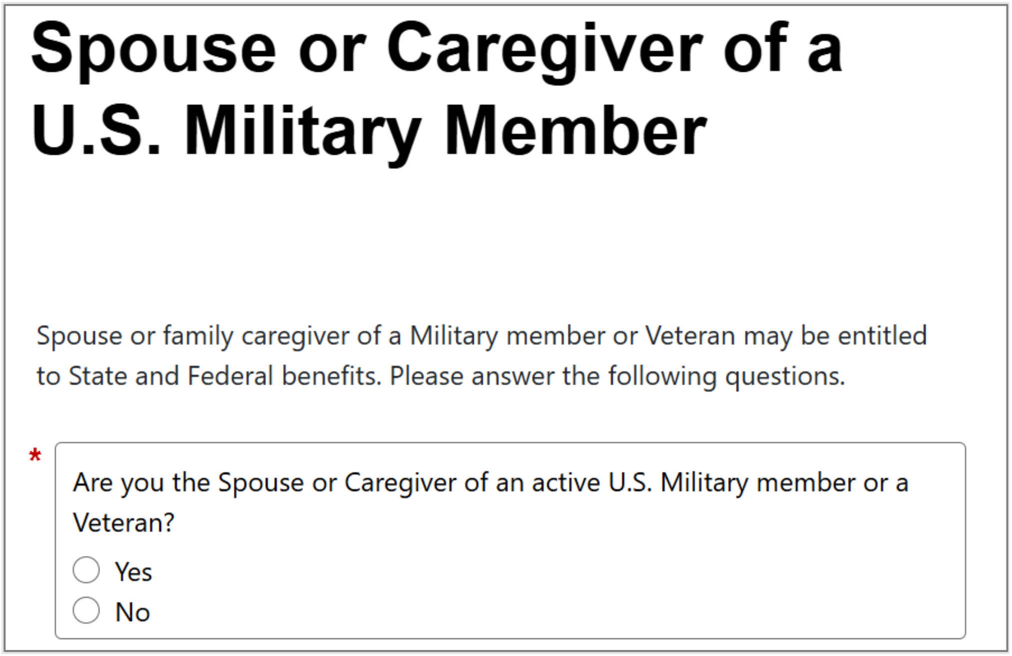
12. In the **Disability** section, select to indicate whether the individual has a disability.

13. In the **Education Information** section, select the individual's highest education achievement level and their current school status.



Education Information Section of Create Individual Account Process

14. In the **Spouse or Caregiver of a U.S. Military Member** section, provide responses for the questions displayed.



Spouse or Caregiver of a U.S. Military Member

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

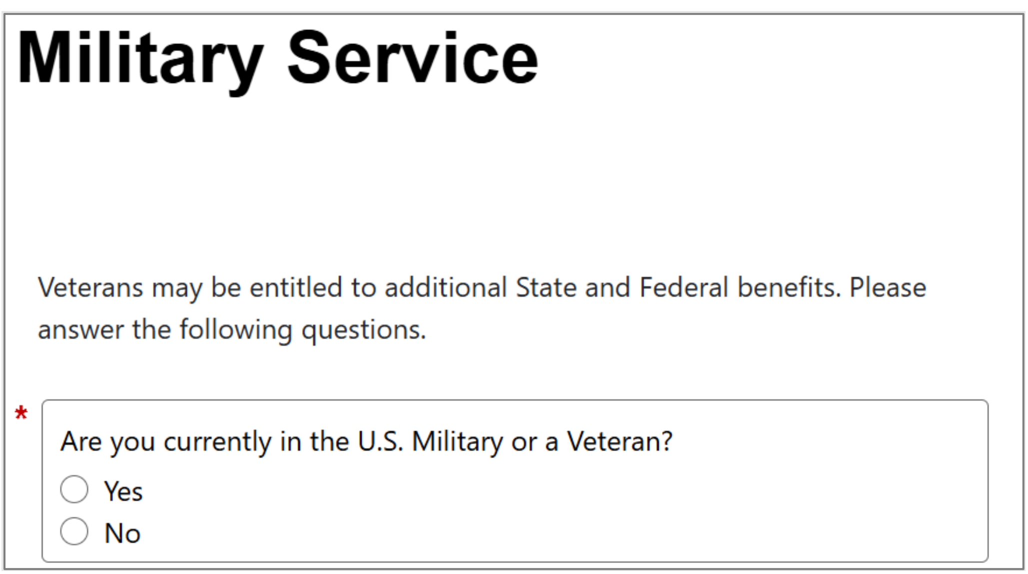
* Are you the Spouse or Caregiver of an active U.S. Military member or a Veteran?

- Yes
- No

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

Note: Selecting Yes will trigger the display of additional information and/or questions.

15. In the **Military Service** section, provide responses to each question.



Military Service

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

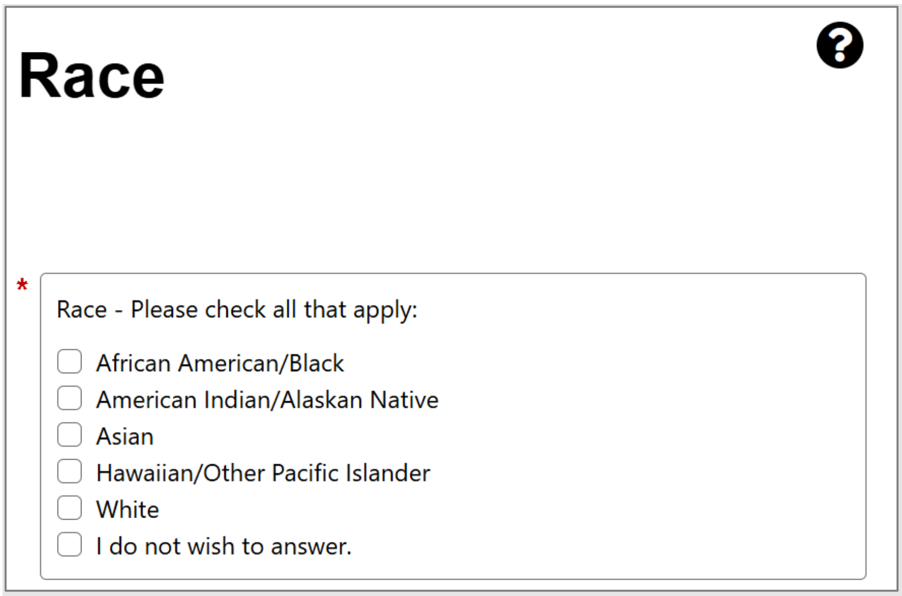
* Are you currently in the U.S. Military or a Veteran?

- Yes
- No

Military Service Section of Create Individual Account Process

16. In the **Ethnic Origin** section, select whether the individual is of Hispanic or Latino heritage.

17. In the **Race** section, select all races that apply.



Race Section of Create Individual Account Process

18. In the **Language** section, indicate whether the individual has difficulty or limited proficiency with English.

19. Click the **Save** button.

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 of Create Individual Account Process

A Registration Confirmation page displays (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

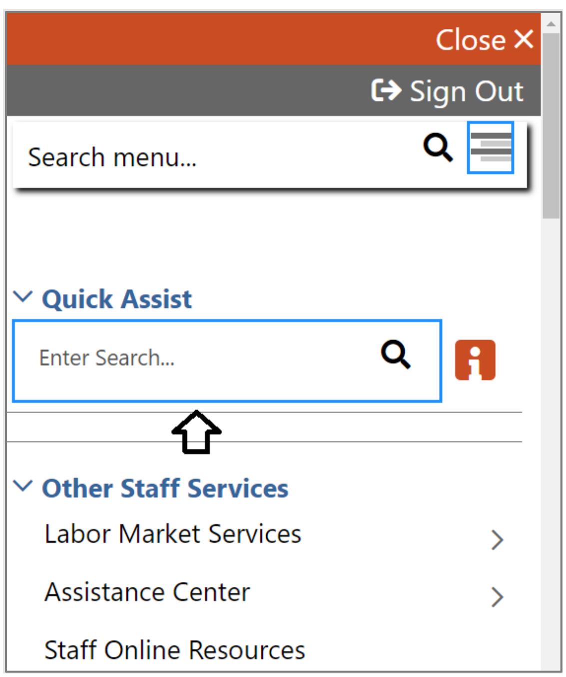
Staff Assisting Individuals

Searching for an Individual and Assisting

Once an individual has completed system registration, you can perform a search for their account and provide assistance using any of the following search methods:

- **Quick Assist** - The Quick Assist option is available on the top of the left side-bar navigation menu and is a convenient way to search for an individual using the full or last four digits of an individual's SSN, login name, user ID, state ID, last name, last name and first name.

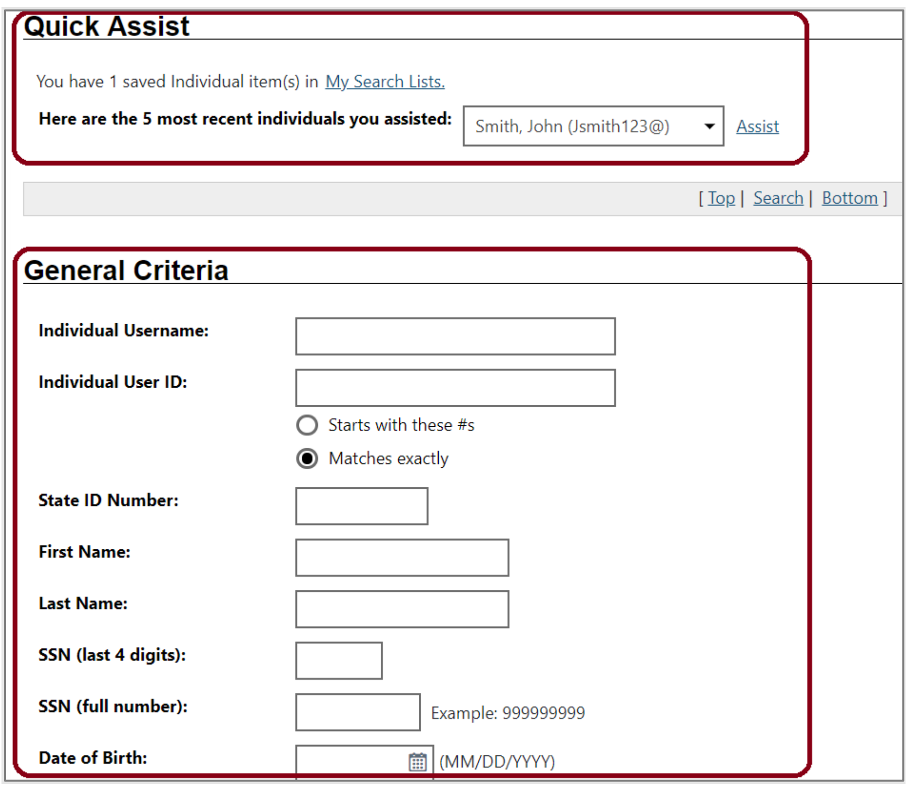
Note: The full range of criteria used in the search can be identified by clicking the Help icon located to the right of the search entry field, as shown in the figure that follows.



Quick Search Menu / Help Icon

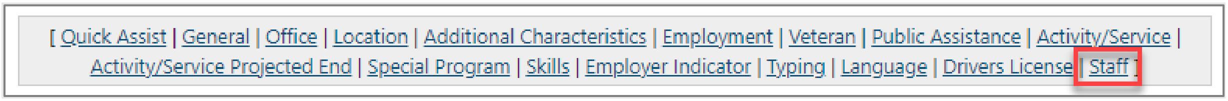
General Search – To perform a general search for an individual:

- On the left navigation menu under the **Services for Workforce Staff** section, select Manage Individuals > Assist an Individual.
- A search window is displayed allowing you to specify information about the individual you want to assist.
- Select a desired name from the **Quick Assist** drop-down box to quickly access one of the most recently accessed accounts or enter criteria to find a desired individual in the **General Criteria** section (see figure below).



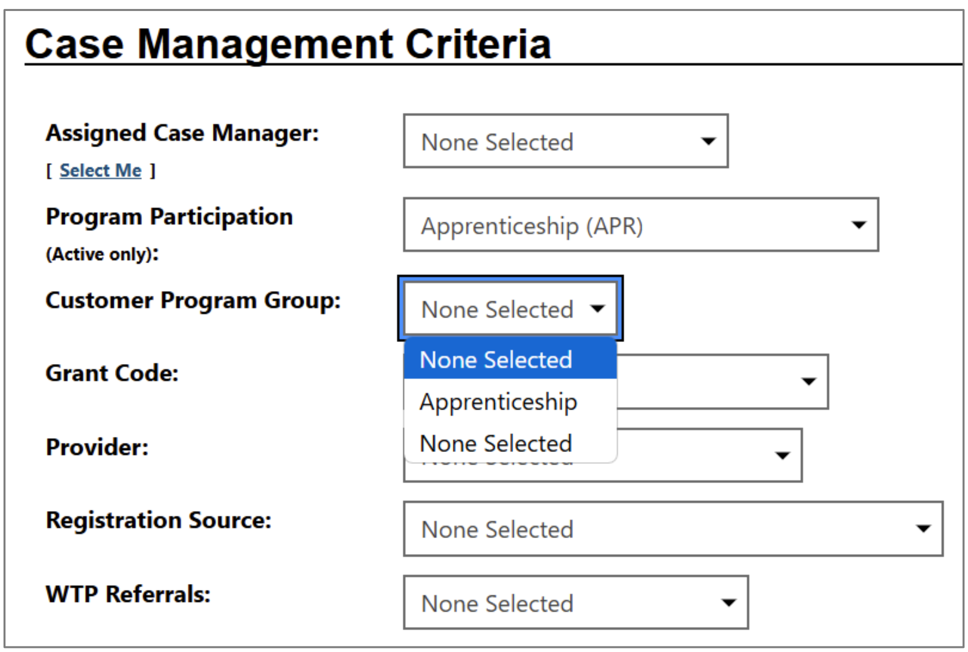
Quick Assist and General Search Criteria

- **More Search Options** – The **<u>More Search Options</u>** link near the bottom of the page will launch a link menu at the top of the page with additional search options. For example, to conduct a general customer search based on program participation, click the **<u>Staff</u>** jump link (see figure below).



Jump Links Menu for Performing a Job Seeker Search

If you select a desired program from the Case Management Criteria section, the system will refresh and display related Customer Program Groups to filter your selection (see figure below).



Case Management Criteria Search Option

- Click **<u>Search</u>** link at the bottom of any section or click the **Search** button at the bottom of the page to run the search.

- The search results appear within a table. Click the column header to sort the results. Click the column header again to sort the results in reverse order.

- Click **Modify current criteria** at the bottom of the page to add or remove criteria to change results.

- When you locate your Individual, click on the **User Name** link (see figure below) to access that individual's account details.

Results View: **Summary** | Detailed

To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Action	Select
chrisbreezy@	Chris	Brown	0020	No	88			05/06/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	
GSISSOJBROWN	Jane	Brown	6666		12			04/09/2019	Summary Tab Case Notes Tab Activities Tab Programs Tab	

Save New List

2 Records found

SEARCH CRITERIA: Last name begins with brown

Search Results and Actions

Search Result Actions

- **Summary Tab** - Case summary of services.

- **Case Notes Tab** - Case Notes for the individual.

- **Activities Tab** - Activities for the individual.

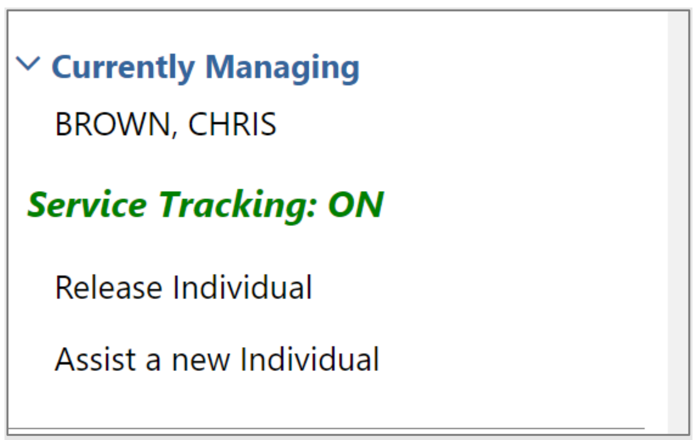
- **Programs Tab** - Wagner-Peyser program details.

Note: Using the **My Staff Account** feature, staff may customize the hyperlink display under the **Action** column.

Currently Managing

When assisting an individual or employer, **Currently Managing** displays on the left side-bar menu with their name which links to the folders, profiles, and specific functions (see figure below). Currently Managing also displays at the top of the page.

Note: An American flag and/or (MSFW) will also display next to the name if the individual is a veteran or a Migrant Seasonal Farm Worker.



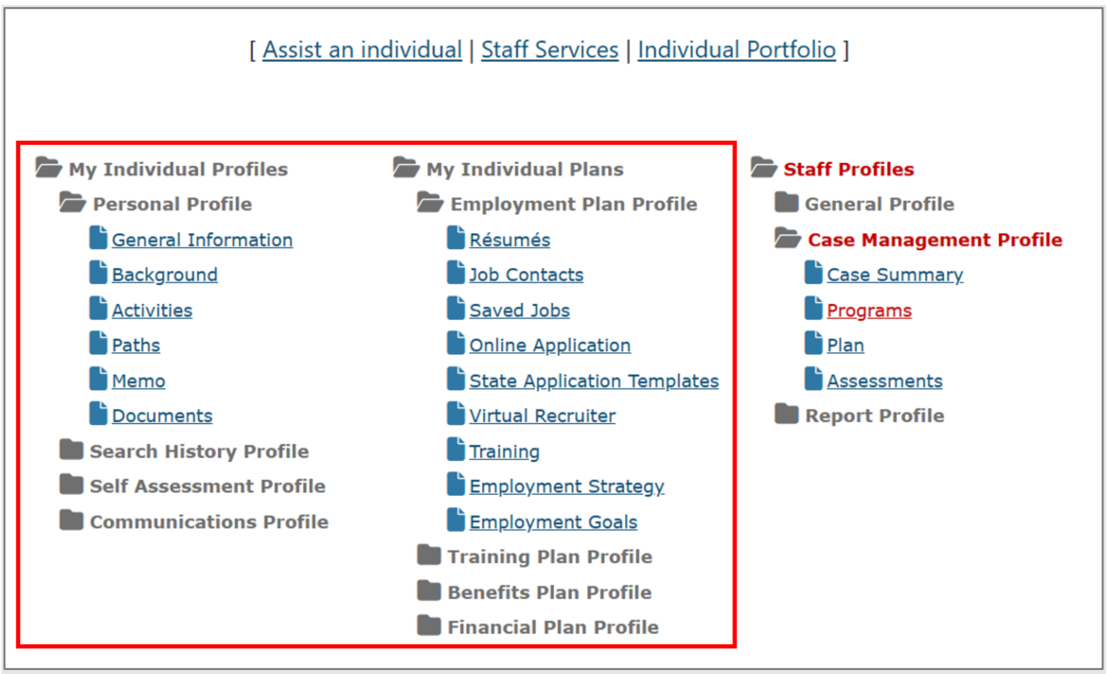
Currently Managing

- **Service Tracking: ON** (indicator) - Refers to the tracking and recording of some services and activities automatically without the need for staff to enter them manually. The **automatic service tracking** design helps staff focus more attention on their customers' needs (see figure above).

- **Release Individual** - When finished working with an individual, select **Release Individual** from the **Currently Managing** menu group (see figure above).
- **Assist a new Individual** - Assist another registered individual.

Individual Portfolio Folders

Individual Portfolio Folders are quick links to an individual's profiles, programs, and plans and are located at the top of the page when assisting an individual (see figure below).



Individual Profile Folders

To view or modify the information in the individual's profiles, programs, and plans, click the name of the individual currently being assisted under **Currently Managing** on the left side-bar menu.

My Individual Profiles

My Individual Profiles stores all the individual's personal information, keeps track of all searches they performed in the system, provides access to self-assessment tools, and lets them communicate with employers or others regarding their career interests (see figure above).

Folders include:

- **Personal Profile**
    - **General Information** - Contact and profile information about the individual as recorded during system registration.
    - **Background** - Information that can be used in a résumé or application.
    - **Activities** - Self-evaluations and other assessments.
    - **Paths** - Individuals collect **badges** as they complete tasks that are designed to help them maximize the system's features, such as creating résumés and completing assessments.
    - **Memo** - Blank memo text box where an individual can maintain reminder messages to themselves.
    - **Documents** – Contains the individual's documents that have been uploaded to the system.
- **Search History Profile**

  - **Jobs** – Displays the list of jobs that the individual viewed.
  - **Employers** – Displays the list of employers that the individual viewed.
  - **Programs** - Lists the training programs which the individual has participated in.
  - **Scholarships -** Lists any scholarships the individual previously viewed and lets users conduct new scholarship searches.
  - **Occupations** – Displays a list of specific occupations the individual searched for.
  - **Industries** – Displays a list of Industries the individual searched for.
  - **Areas** - Displays a list of areas previously viewed.

- **Self-Assessment Profile**

  Use the individuals listed skills to search for occupations and jobs in the system that require those skills by clicking the **Find Matching Occupations and Jobs** button in each of the following sections:

  - **Job Skills** - Displays the job skills selected during registration.
  - **Personal skills** - Displays the personal skills selected during registration.

- **Work Interests** - Displays the scores for the Work Interests and Work Interest Analyzer assessments, if taken.
- **Work Values** - Displays the scores for the Work Values and Work Values Analyzer assessments, if taken.
- **Tools and Technology** - Shows the typical tools and technology tools saved to the system, if any.
- **Multiple** – Allows selection of multiple types of self-assessments and combines them to produce a list of occupations that match the selected skills during registration.

- **Communications Profile** - Contains tools to access and manage communications. Tools include:
  - **Messages** – Collects and stores system messages received, sent, saved, or removed.
  - **Correspondence** - Lists information about the letters and correspondence created in the system.
  - **Communication Templates** – Contains default templates, such as a cover letter for job seekers who are applying for jobs, or a rejection letter for employers who are reviewing job applicants. Also allows creation of new templates.
  - **Subscriptions** - Displays System Alert messages received in your Message Center through your e-mail address or as a text message. System alerts are helpful

messages and reminders that the system sends to users who have configured and requested alerts.

- **Email log** - Contains a list of email messages from the WorkinTexas.com system that have been sent or received. Use the drop-down list to filter between sent and received messages.

My Individual Plans

The following folders quickly display an individual's employment, training, benefits for which they may be eligible, and financial plan profiles.

- **Employment Plan Profile**
    - **Résumés** - Select to display all résumés that the individual has created in the system.
    - **Job Contacts** - Displays job contacts you've entered in the system.
    - **Online Application** - Select to display a brief summary of saved background history used for pre-populating the system application when applying for jobs.
    - **State Application Templates** - Select to display a list of created State of Texas Applications. Allows for creating a new template or application.
    - **Virtual Recruiter** - Select to display the virtual recruiter job alerts set up in the system. Allows for creating new alerts.

  - **Employment Strategy** - Select to access a powerful tool and strategy to quickly find a new job nearby that matches the individual's background.
  - **Employment Goals** - Select to develop an Individual Employment Plan (IEP) and/or Service Strategy.
- **Training Plan Profile** - Displays information about classroom or online training in which an individual has participated. Folders include:
  - **Classroom Training** - Displays information about training activities that the individual has undertaken, typically through state or federal benefit programs, and allows the user to search for training providers or programs.
  - **Online Training** - Displays the online training courses that the individual has taken or are currently working on.
- **Benefits Plan Profile** - Access basic information on government benefits for which the individual may be entitled. Folders include:
  - **Workforce Innovation and Opportunity Act (WIOA)** - Access basic WIOA program information, the types of services the program offers, and program eligibility information.
  - **Trade Adjustment Assistance (TAA)** - Access basic TAA program information, the types of benefits and

services the program offers, and program eligibility information.

- **Other Benefits** - Includes a list of resources to local, state, and federal benefits for unemployment claimants, veterans, youth, and seniors.

- **Financial Plan Profile** - Provides tools for individuals to create overall budgets, training budgets, and transition budgets. Folders include:
  - **Financial Literacy** - List of resources to manage personal funds.
  - **Overall Budget** - Tools to create a budget for income and expenses.
  - **Training Budget** - Tools to create a budget for training and a list of training resources.

    Transition Budget - Tools to create a transition budget that allows individuals to analyze expenses and income for a selected time and create a plan for a job transition.

Staff Profile Folders

When you are Currently Managing an individual or an employer, the **Staff Profiles** menu will display staff-specific folders.

Note: Only staff members can view this profile menu (see figure below).

Staff Profile Folders

Staff profiles consist of the following folders:

- **General Profile** - Enables staff to review summary information on an individual, create case notes, or conduct Wagner-Peyser services.
  - **Summary** - Select to view general information about the individual through several summary panels and review an individual’s background.
  - **Case Notes** - Select to create case notes pertaining to the individual in a central location no matter where they are created.
  - **Activities** - Select to review an individual’s involvement in the Wagner-Peyser program.

  - **Documents (Staff)** - Select to interactively upload/import or scan documents into the system. Staff can attach an electronic document to a client's record.

- **Case Management Profile** - Enables staff to manage services for various federal programs, create an Individual Employment Plan (IEP), and maintain recorded assessments. Folders include:

  - **Case Summary** - Select to display information about the individual through several summary panels. Allows staff to review an individual's background.

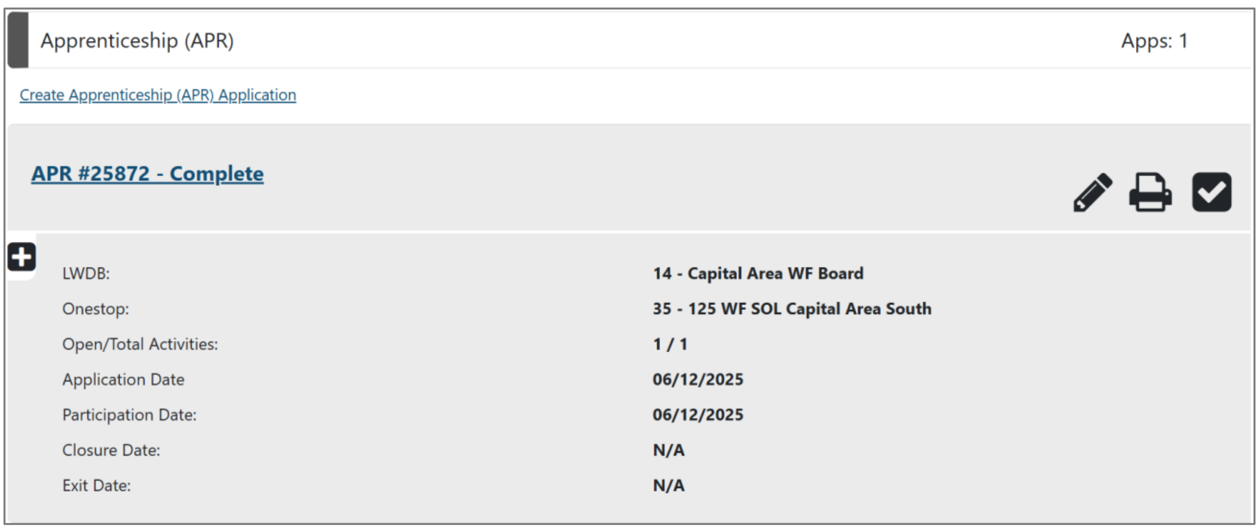
  - **Programs** - Select to display details of an individual's involvement in federal and local programs. Allows staff to create and manage applications and enrollments for the individual in various programs.

  - **Plan** - Select to display a customer's career goals, skills assessments, and IEP. This information provides a comprehensive plan or needs analysis that helps direct the types and number of program services provided to the individual.

  - **Assessments** - Select to create and manage assessments that can only be entered by staff (such as Basic Skills Assessments - TABE Test and WorkKeys® tests).

- **Report Profile** - Allows staff to review an individual's tasks, system access, and assessments. Folders include:

- **Tracking** - Select to review when an individual has accessed specific system components.
- **Statistics** - Select to monitor an individual's site usage. Contains links to specific created items such as résumés and/or the Virtual Recruiter.
- **Combined Assessment** - Allows staff to view and print assessments, both self-assessment and case management-related, all on one screen.
- **Labor Exchange** - Maintains a list of dates and times employers viewed an individual's résumés and provides access to employer and résumés details.



Apprenticeship Program Application

Apprenticeship Participant Application

Training Objectives

The following module will focus on primary staff functions used for managing program applications.

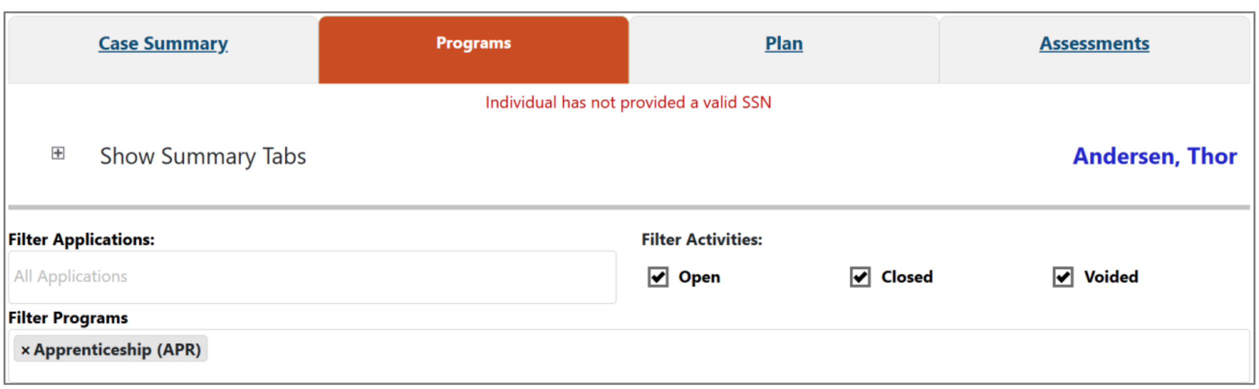
After completing this module, you will be able to:

- Navigate to the Apprenticeship application in the Programs tab.
- Confirm prior participation status.
- Enter the required information to complete the program application wizard.
- Review any interfaced or prepopulated data.

Note: Each Apprenticeship participant must have a registration before completing an Apprenticeship application.

To Complete an Apprenticeship application:

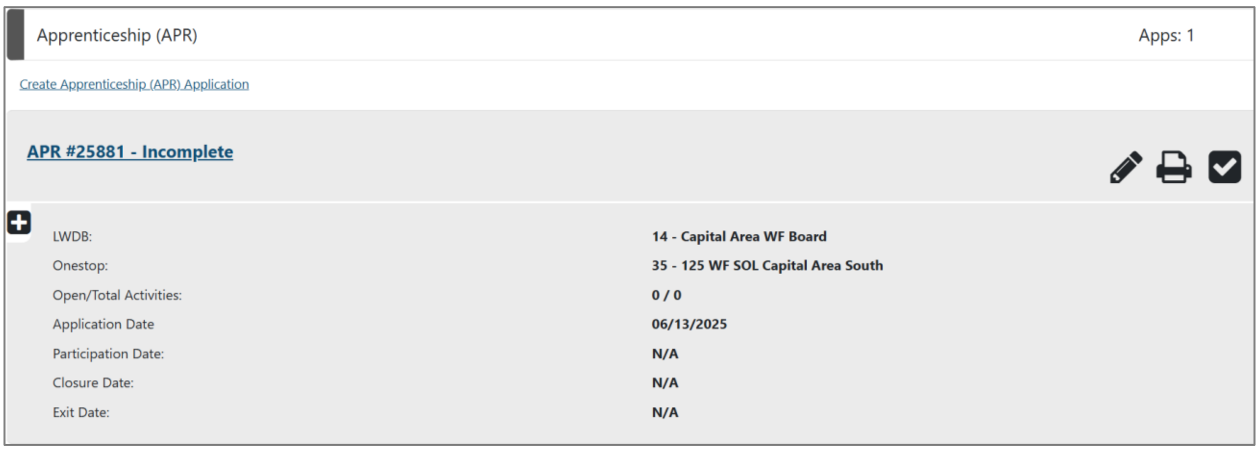
1. Find and assist the desired individual, then navigate to their Programs tab.



Programs Tab – Apprenticeship Panel

2. Scroll down to the **Apprenticeship (APR)** section and select the **Create Apprenticeship (APR) Application** link. The application wizard launches. Many of the fields are already populated for you.

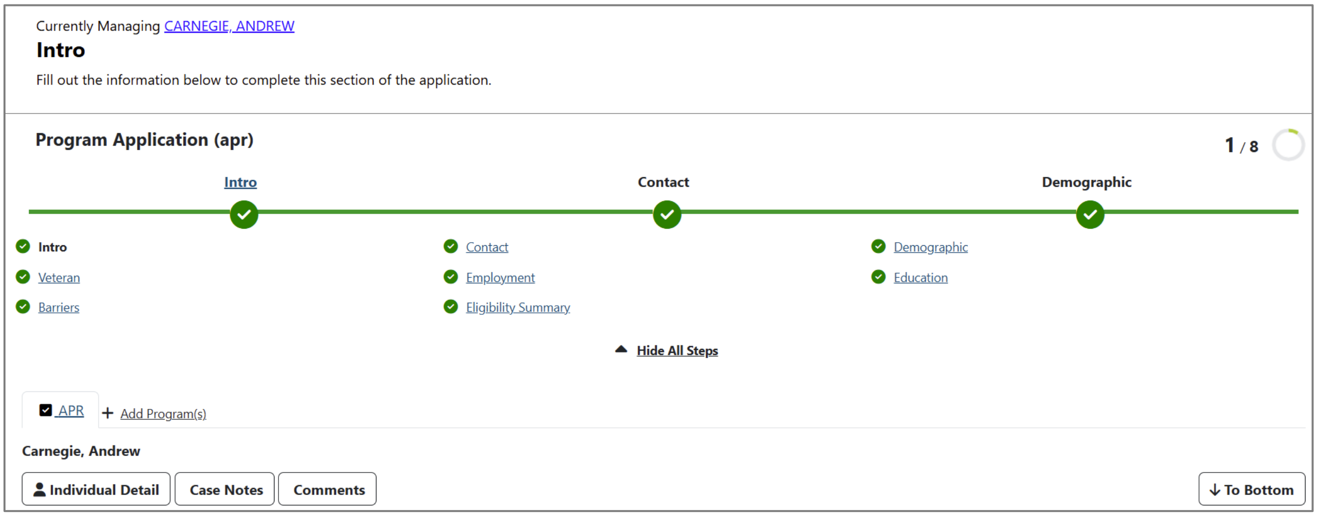
Note: If a Partial application was previously created, you will not click the Create link; the partial app will be listed as **Incomplete** below the link, and you will click the pencil icon on the right side of the panel to open it and complete it.



Pre-populated Incomplete Apprenticeship Application Link

Staff must use the application wizard to complete all required fields in the Apprenticeship application during the initial meeting. The application is only considered **Complete** once all required fields are filled in.

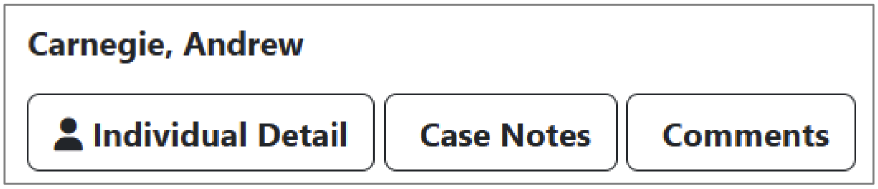
Navigating the Application Wizard



Apprenticeship Application Wizard Progress Bar and List of Steps

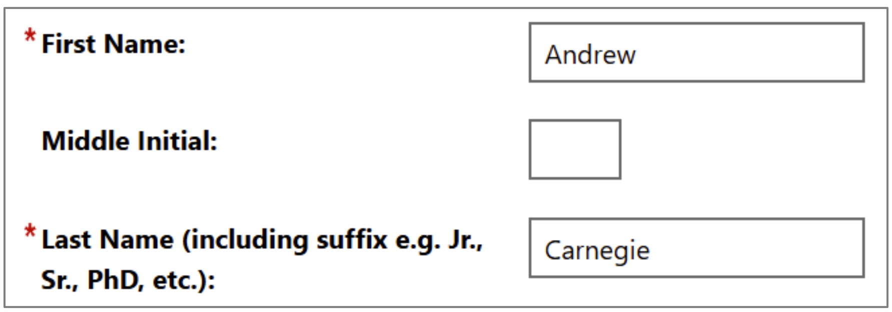
- The application wizard highlights the first step, **Intro**. A progress bar displays at the top of the application through all steps to show progress. To display the steps, click the **Show All Steps** link. To hide the list of steps, click the **Hide All Steps** link; the progress bar remains.
- The current step displays the page name with a yellow solid circle on the progress bar; completed steps are green with a check mark in the circle; and incomplete steps are grey with an X in the circle. Once a step has been completed, the step name becomes a bold link that can be used to navigate to that page.
- To display key details about the individual such as username, email address, and phone number, click the **Individual Detail** button located below the individual's

name. Click the red **Individual Detail** button to close the details display.



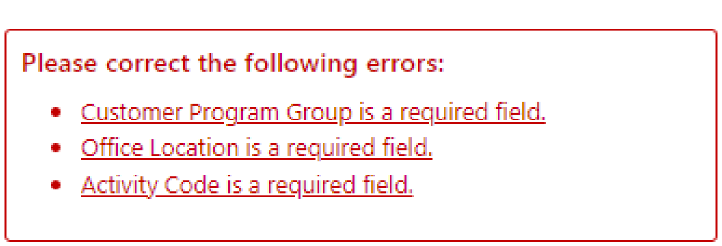
Individual Detail Button Located on Intro Page of Application

- Fields marked with a red asterisk are required fields.



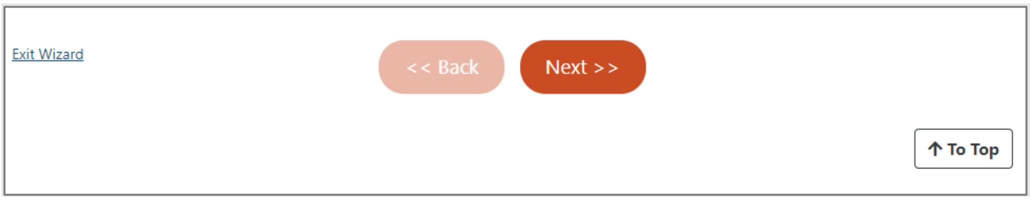
Required Fields Indicated with an Asterisk

- If an entry is missing in one or more of these fields, when the **Next** button is clicked, a message displays in red indicating which data is missing. Complete the field(s) and click the Next button to proceed.



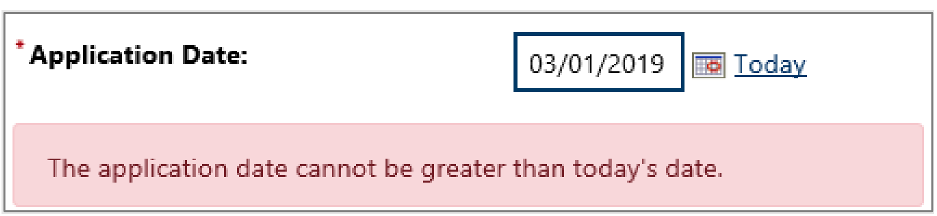
Notification of a Missing Required Field

- To save data and advance to the next step in the application, click the **Next** button at the bottom of the page. While the system is Validating and Saving Data, Updating Wizard, and Redirecting to the next step, a progress bar of these activities displays at the bottom of the page.
- Use the **Back** button to return to the previous step.



Buttons and Links Available at the Bottom of Every Apprenticeship Application Wizard Page

- Clicking the **Exit Wizard** link located at the bottom left of each page exits the application. Data on the current page is not saved; only data entered through the previous page is saved. Exiting in this manner before the final step is saved, will result in an **Incomplete application**.



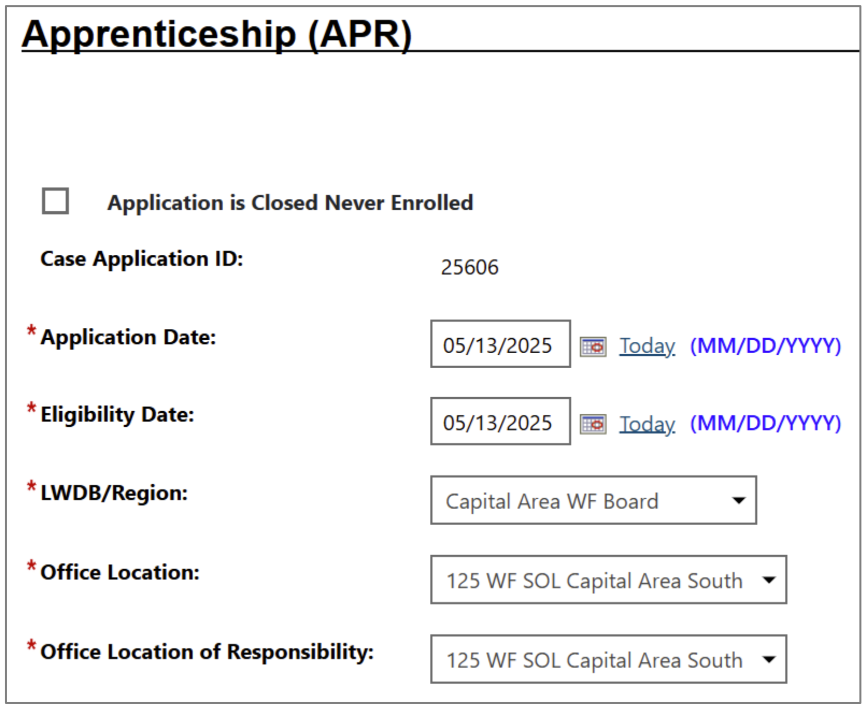
Apprenticeship Application Date Field

The information icon, the gray circle with a white question mark icon, located at the right of each page will display helpful instructions or information for completing the current page.

Completing the Apprenticeship Application Wizard

Intro Page

Some of the Intro page fields are prepopulated from the individual's registration information.



Apprenticeship Application Intro Page

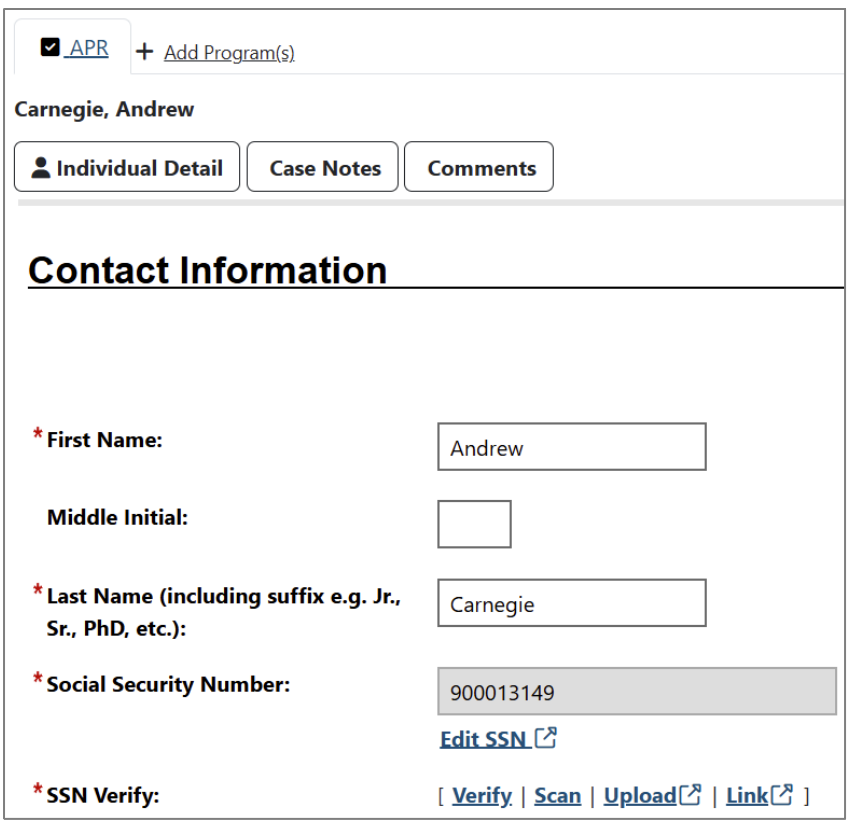
1. Enter the **Application Date**.
2. Enter the **Eligibility Date**. For Apprenticeship, this is required in order to move forward in the application.
3. **LWDB/Region and Office Location** may be pre-filled based on the default area and office for the staff member working the application; modify, if necessary.

4. Select the **Next** button, located at the bottom of the screen, to validate and save your entries and proceed to the Contact page.

Note: Each time you click **Next**, the current page's data is saved; if you leave the page without clicking **Next** (e.g., by clicking the **Exit Wizard** link or using the browser buttons or history), the data on the current page will not be saved.

Contact Page

Many of the Contact page fields are prepopulated.



Apprenticeship Application – Contact Page

1. Ensure that all entries are correct and that all required fields are completed. Required fields are marked with a red asterisk (*). The **Edit SSN** link is available only to staff with proper privileges.

Note: There will be data in other sections, such as address and phone information. Review and add or adjust data, as appropriate.

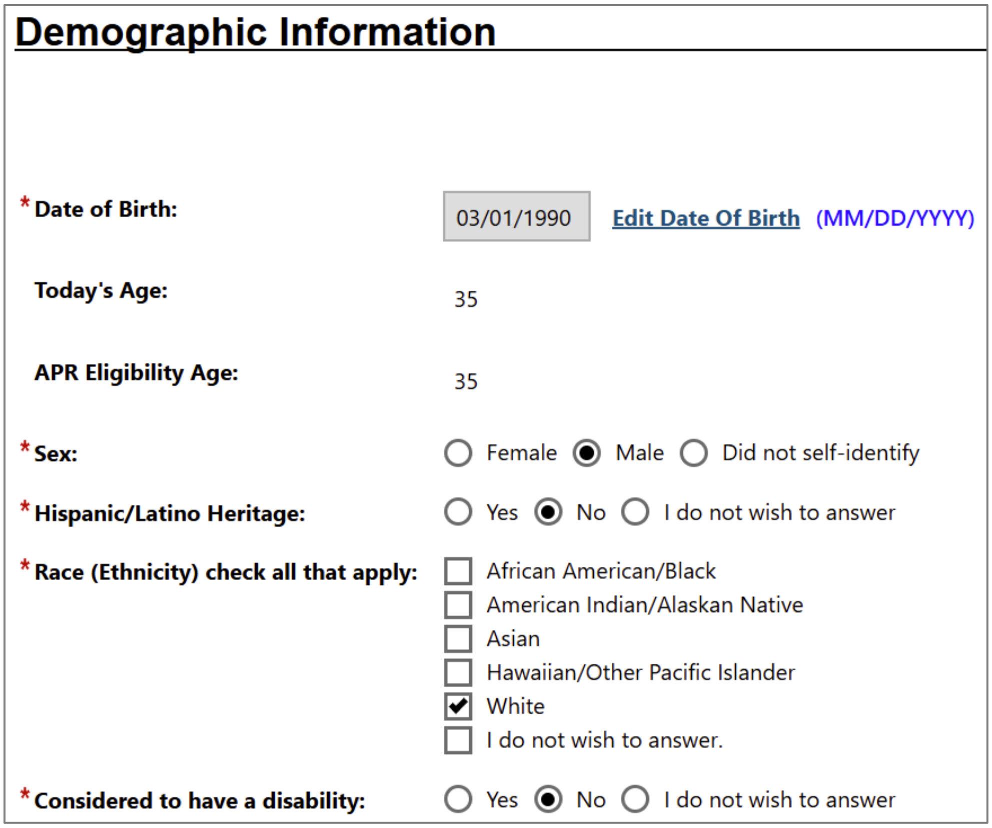
2. The **SSN Verify**, **Preferred method of contact**, and **Primary Phone Type** require you to select from the drop-down menu in order to proceed.

3. Click **Next** to save your edits and continue to the **Demographic** page.

Demographic Page

The Demographic page is largely prepopulated with data previously saved in the system. Staff's primary task on this page is to ensure the information is accurate and edit any information as necessary.

1. Ensure that all entries are correct and that all required fields are completed.


Demographic Information

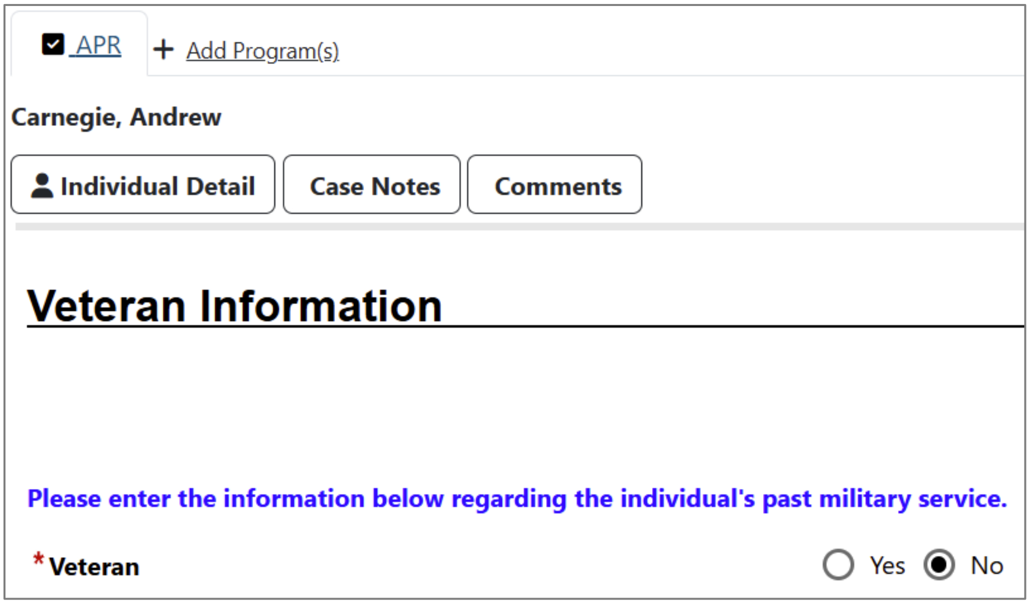
* Date of Birth:	03/01/1990 Edit Date Of Birth (MM/DD/YYYY)
Today's Age:	35
APR Eligibility Age:	35
* Sex:	○ Female ◉ Male ○ Did not self-identify
* Hispanic/Latino Heritage:	○ Yes ◉ No ○ I do not wish to answer
* Race (Ethnicity) check all that apply:	☐ African American/Black ☐ American Indian/Alaskan Native ☐ Asian ☐ Hawaiian/Other Pacific Islander ☑ White ☐ I do not wish to answer.
* Considered to have a disability:	○ Yes ◉ No ○ I do not wish to answer

Apprenticeship Application – Demographic Page

2. Click **Next** to save your edits and proceed to the **Veteran** information page.

Veteran Page

The Veteran page is prepopulated with data from the registration completed by the individual's case manager.



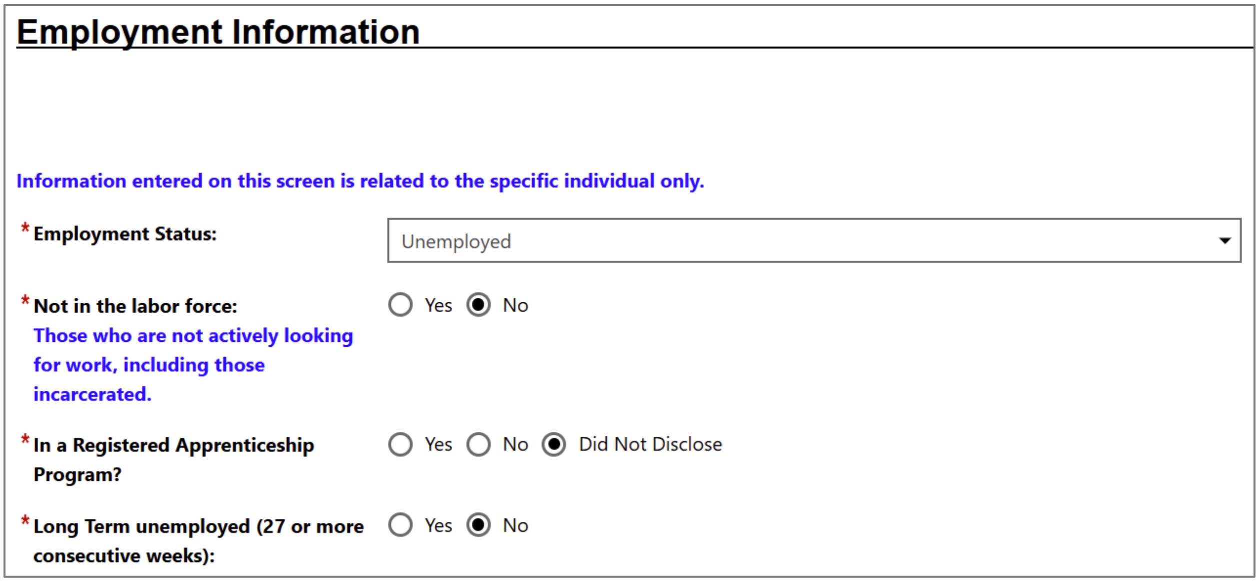
Apprenticeship Application – Veteran Page

1. Review the information and edit the information as necessary.
2. Select the **Next** button to proceed to the **Employment** page.

Employment Page

Employment page data may be prepopulated from the individual's registration.

Enter the required applicable **Employment Status** and complete the required fields.


Employment Information

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

*Employment Status: Unemployed

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

*In a Registered Apprenticeship Program? Yes No Did Not Disclose

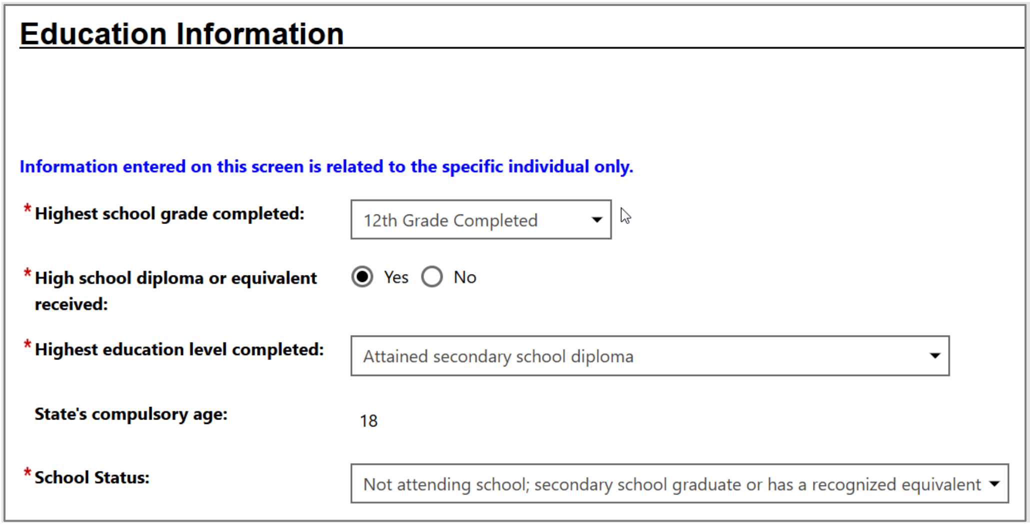
*Long Term unemployed (27 or more consecutive weeks): Yes No

Apprenticeship Application – Employment Information Page

1. Select the **Next** button to proceed to the **Education Information** page.

Education Information Page

Education page data may be prepopulated from the individual's registration.



Apprenticeship Application – Education Page

1. If not already prefilled, select the client's **Highest school grade completed** from the drop-down list.
2. For **High school diploma or equivalent received**, select the appropriate answer.
3. For **Highest education level completed**, select the appropriate answer.
4. For **School Status**, select the appropriate status.
5. Click **Next** to save your edits and continue to the **Barriers** page.

Barriers page

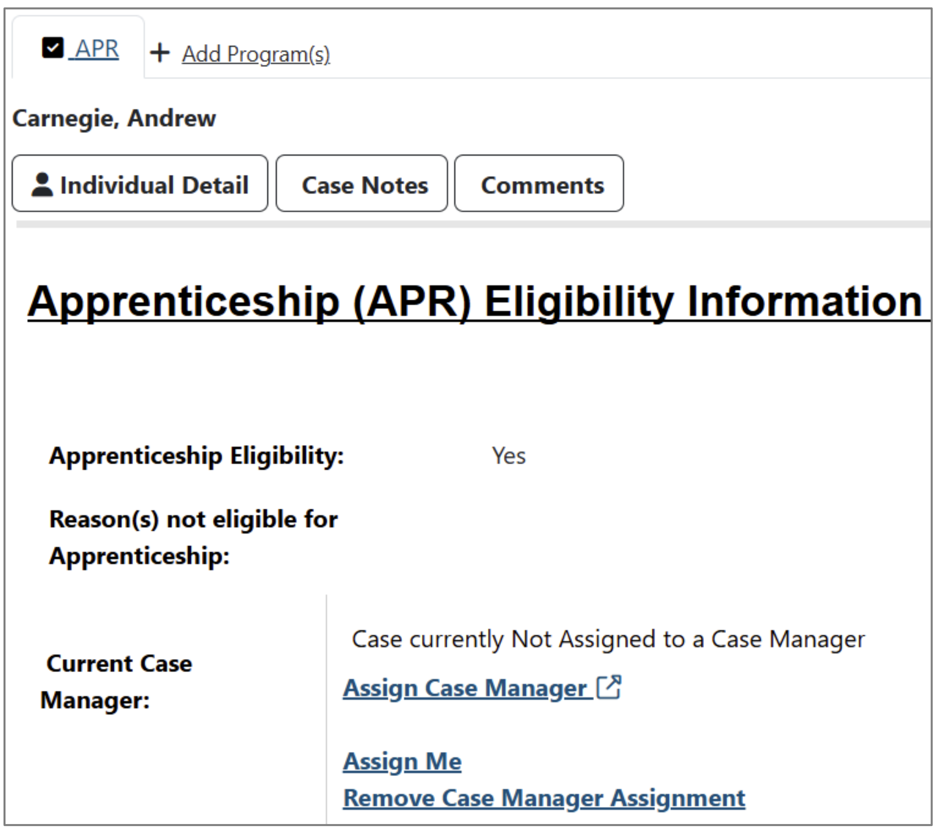
The Barriers page may be prepopulated from the individual's registration.

1. If not already prefilled, select the client's **Ex-Offender** status.

2. Click the **Next** button to proceed to the **Eligibility Summary** page.

Eligibility Summary Page

This is the last page which displays the applicant's eligibility. It should indicate **Yes** that he/she is eligible for the Apprenticeship program. If the applicant is not eligible, the reason will display in the **Reason(s) Not Eligible for Apprenticeship** section. On this page, an option to assign a case manager is displayed.



Apprenticeship Application – Eligibility Summary Page

1. Select the **Finish** button to complete the application. A confirmation window will open.

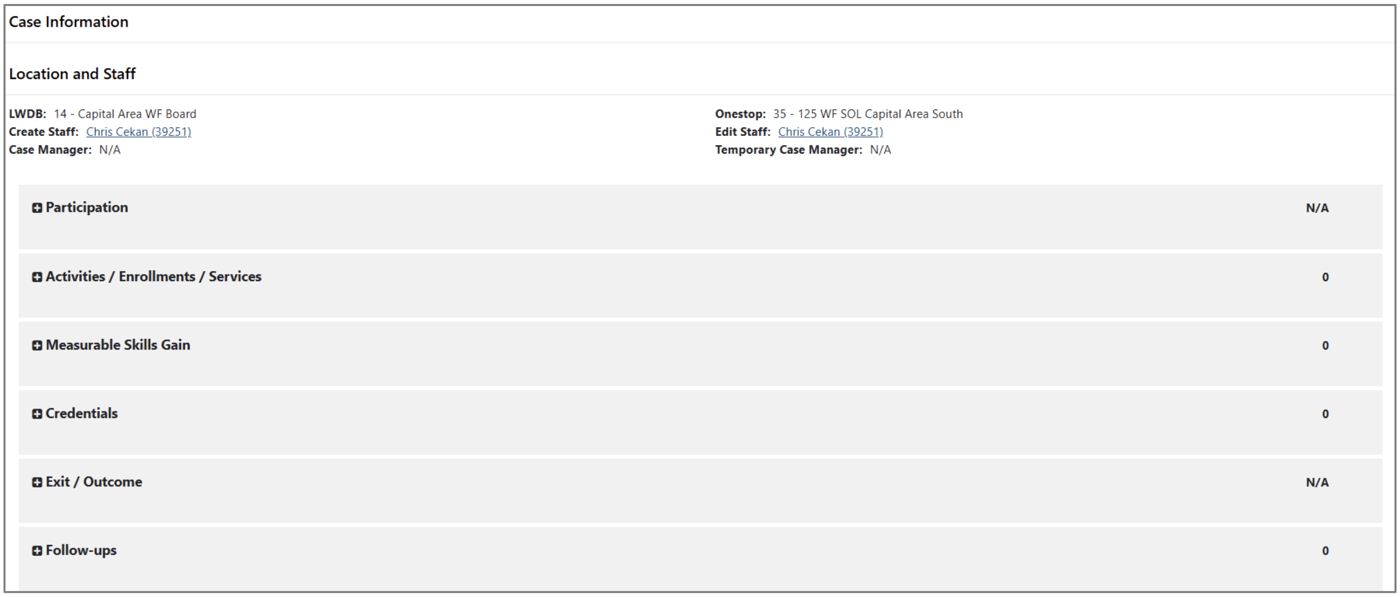
i. Select the **Return to Programs Tab** link**.** The Apprenticeship Application should now appear as Complete.

On the **Programs** tab, the Application will now appear as **Complete** and assigned a unique Case Application ID number.

Completed Application Status

- To view the sections of the application in read-only mode, click the Complete link on the left side of the gray bar.
- To edit the application data in the wizard, click the pencil icon on the right side of the gray bar.

Selecting the plus sign icon below the **Apprenticeship Application ID** will open the **Case Information** section which contains ribbons to access information or perform Apprenticeship tasks for the customer. You can now access the Apprenticeship program ribbons to provide Apprenticeship services.



Case Information and Apprenticeship Ribbons Menu

Apprenticeship Participation Ribbon

Training Objectives

After completing this module, you will be able to:

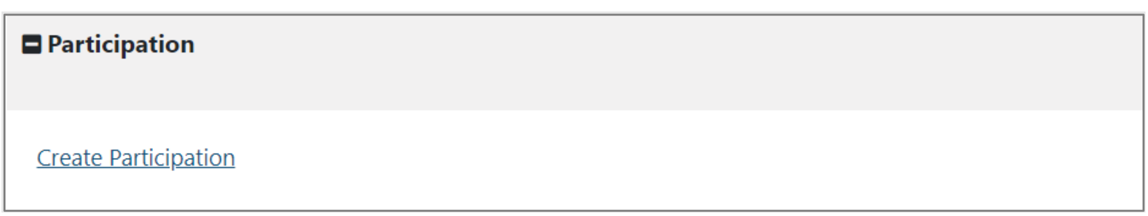
- Navigate to the Participation Ribbon.
- Create/Complete the participation information.

Staff must complete the Participation information before they can add any activities or services for the participant. Normally you will do this right after completing the application and then enter the first activity.

Creating a Participation Record

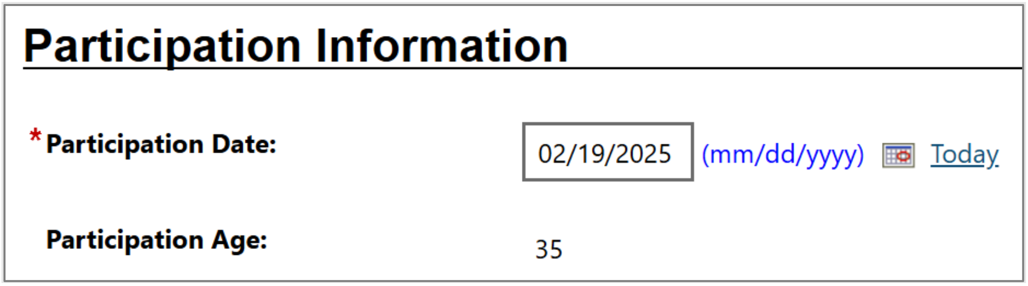
To create a Participation Record (Service 902 Pre-Apprenticeship):

1. From the Apprenticeship ribbons menu, select the **Participation** ribbon.
2. Select the **Create Participation** link. The **Participation Information** page opens.



Participation Ribbon

3. Enter the **Participation Date.**



Participation Information Form

4. Click the **Next** button to proceed to the next screen. The Activity Enrollment wizard opens to the **General Information** tab.
5. Select the **Office Location** from the menu.
6. Under the **Enrollment Information** section, click the **Select Activity Code** link which will open the activity codes window to select from.
7. Select the applicable activity code.
8. The **Actual Begin Date** is prepopulated.
9. Enter the **Projected End Date**.
10. The **Reporting Grant** is automatically prepopulated.
11. Select the applicable **Service is Funded/Co-Funded by** checkbox.
12. Click the **Next** button. The **Service Provider** tab will open.
13. Confirm the **Provider** and **Service, Course or Contract** information.

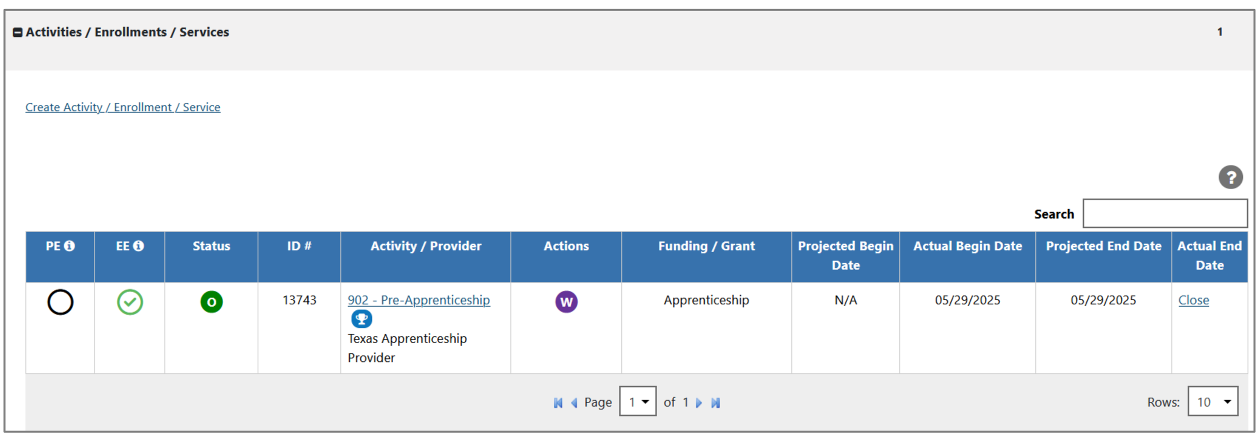
14. Click the **Next** button. The **Closure Information** tab opens.

15. Select the **Finish** button.

Note: Once the Participation form is saved, the Create Participation link changes to Edit Participation in the Participation ribbon.

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.

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). The first activity will display a Trophy icon next to the service name.



Activities / Enrollments / Services 1

Create Activity / Enrollment / Service

Search

PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
		O	13743	902 - Pre-Apprenticeship Texas Apprenticeship Provider	W	Apprenticeship	N/A	05/29/2025	05/29/2025	Close

Page 1 of 1 Rows: 10

Activities/Enrollments/Services Ribbon with Existing Activities

To update an existing service, click the wizard icon (round purple icon) in the Actions column (see figure above). The Activity Enrollment page displays on the General Information tab.

Apprenticeship Activities, Enrollments, Services Ribbon

Training Objectives

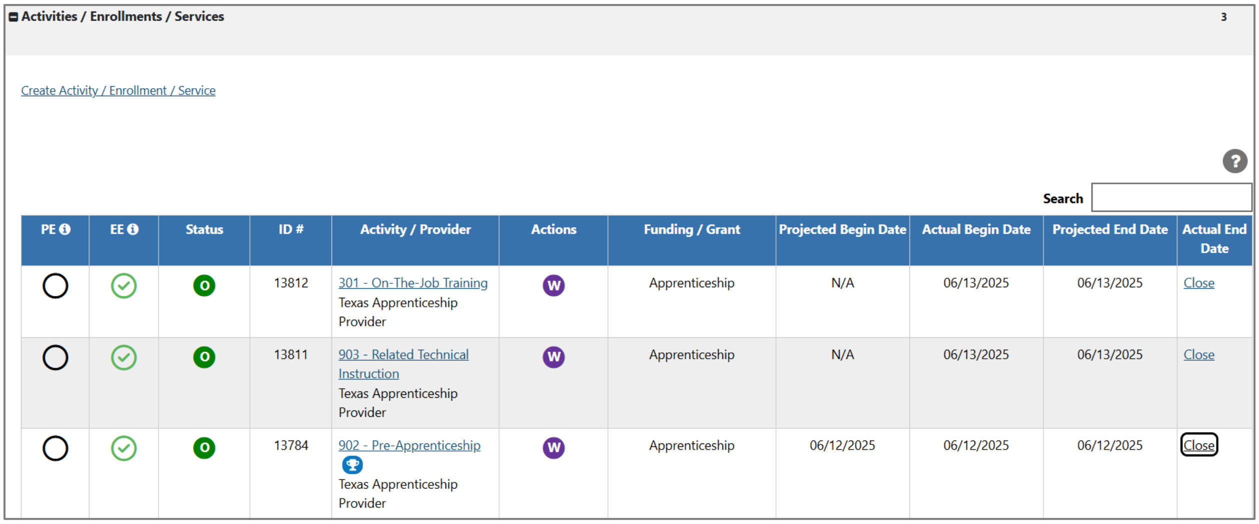
After completing this module, you will be able to:

- Navigate to the Activities/Enrollments/Services Ribbon.
- Add appropriate Activities, Enrollments, and Services for plan participation.
- Enter and identify provider details.

After individuals have been approved for participation in Apprenticeship, you can begin enrolling them in activities and services.

To add a new activity, enrollment, or service (Service 903 Related Technical Instruction):

1. Click the plus sign icon ⊞ to expand their **Apprenticeship Program** application ribbon.
2. Click the plus sign icon ⊞ to expand the **Activities/Enrollments/Services** ribbon. Any activities added previously display in a table from which staff can view and modify the activities (see below).



Activities / Enrollments / Services 3

Create Activity / Enrollment / Service

Search

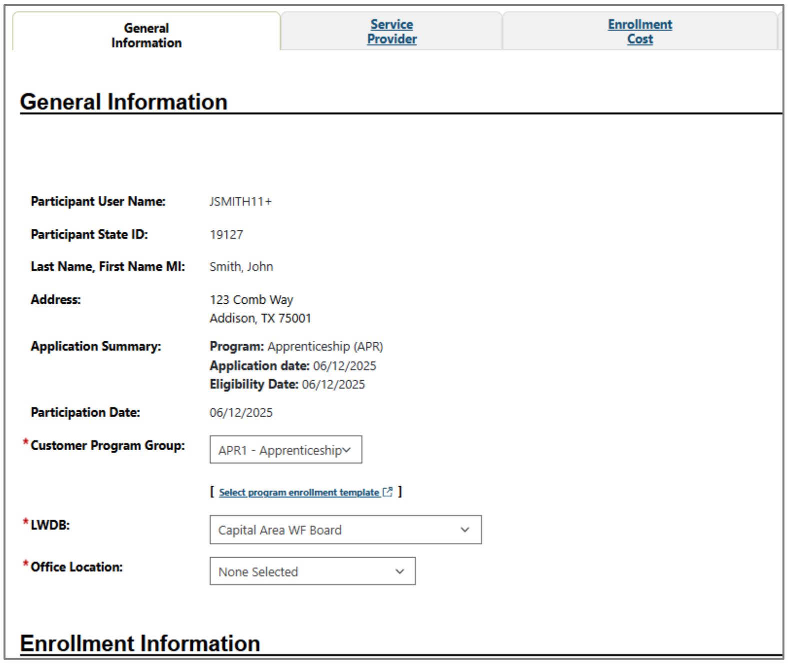
PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
		O	13812	301 - On-The-Job Training Texas Apprenticeship Provider	W	Apprenticeship	N/A	06/13/2025	06/13/2025	Close
		O	13811	903 - Related Technical Instruction Texas Apprenticeship Provider	W	Apprenticeship	N/A	06/13/2025	06/13/2025	Close
		O	13784	902 - Pre-Apprenticeship Texas Apprenticeship Provider	W	Apprenticeship	06/12/2025	06/12/2025	06/12/2025	Close

Activities/Enrollments/Services Ribbon with Existing Activities

3. Click the **Create Activity / Enrollment / Service** link to create an activity or click the wizard icon W in the Actions column to update an existing one. The Activity Enrollment wizard displays on the General Information tab.

General Information Tab

The General Information tab records basic information about the individual, assisting staff member, and service the individual is seeking. Selections made on this first tab determine the available activity/service codes, service providers, and services, courses, or contracts available in later steps.



Activity Enrollment Wizard - General Information Tab

4. The **LWDB and Office Location** determine the list of services and activities displayed in the next section. Select the **LWDB** and the **Office Location** from the drop-down menu.
5. Click the **Select Activity Code** link to open an activity list, and then click an activity link to select it. The **Activity Code** and description fields are populated.
6. If you have an **Actual Begin Date**, enter that. If this is the first enrollment activity, it defaults to the participation date and cannot be changed.
7. If you have a **Projected Begin Date** for the service, enter it. If this is the first enrollment activity, it defaults to the participation date and cannot be changed. If this is for a follow-up service, this must be later than the closure date.

Note: You must enter either a projected or actual begin date.

8. Enter the **Projected End** Date.

Note: Your site's service code configuration may prevent you from entering a projected end date that exceeds defined parameters; for example, if the defined duration of an activity/service cannot exceed 90 days, the system will prevent you from saving a projected end date 91 days or greater than the actual start date.

9. Select the **Reporting Grant**. If there is only one grant available, then it will be preselected for you.

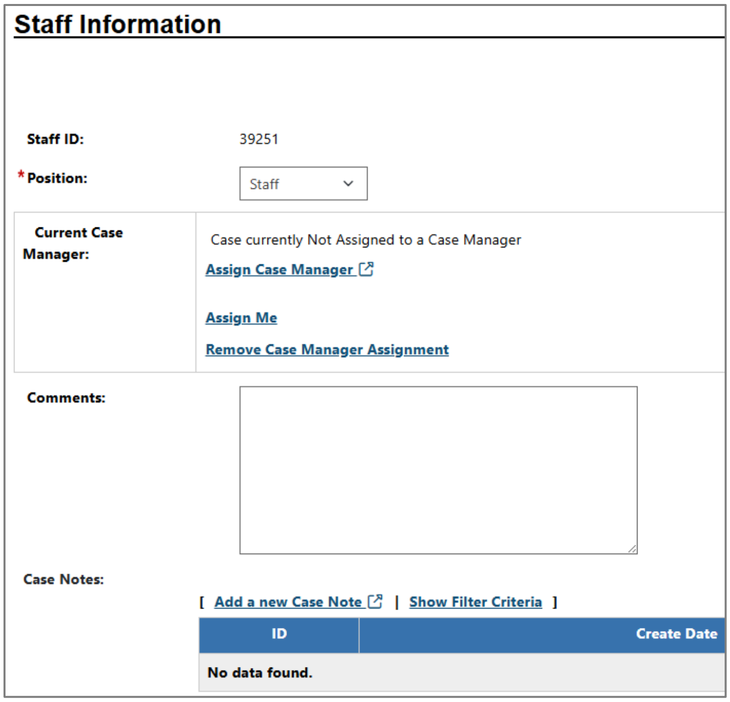
10. Service codes that are registered apprentice services require that the **Registered Apprentice RAPIDS#** be completed. Enter the **Registered Apprentice RAPIDS#**.

11. Enter the **Wage per hour on date of entry into Apprenticeship**.

12. Select the applicable checkboxes for **Service is Funded/Co-Funded by**. You can select up to 3 that apply.

13. Select the **Apprenticeship Program Type**.

14. In the Staff Information section, confirm or select your **Position,** if applicable.



General Information Tab - Staff Information Section

15. Optionally, you may perform any of the following steps to complete this section:

- Change the case manager assignment.
- To assign this applicant to an authorized Apprenticeship case manager, click the **Assign Case Manager** link.
- To assign this participant to yourself, click the **Assign Me** link (you must be currently assigned to the appropriate Apprenticeship case assignment group).
- To remove the currently assigned case manager, click the **Remove** link.
  - If applicable, enter Comments regarding this enrollment record.

Note: To add a case note (using the **Add a new Case Note** link), you must first save the enrollment record and then edit it to add the note.

16. Click **Next** to save the information and proceed to the next tab. The **Service Provider** tab opens.

17. Confirm the **Provider** and **Service, Course or Contract** information. If they're not prepopulated, click the **Select Provider** and **Select Service, Course or Contract** link to add the required information.

18. The **Occupational Training Code** may or not be required depending on whether an Occupational Training code was already preselected for the provider. If it is required and it is not prepopulated, click the **Occupational Training Code** link and search for the applicable code by clicking the **Select Occupation From ONET Table**. The **Occupation Quick Search** window opens. Enter the keyword and select the applicable occupation. The window closes and you will brought back to the **Service Provider** tab.

19. Click the **Next** button. The **Closure Information** tab opens.

20. Select the **Finish** button. You are brought back to the **Activities / Enrollment / Service** ribbon which displays the new service that was added.

To add a new activity, enrollment, or service (301 – On the Job Training):

1. Click the plus sign icon to expand their **Apprenticeship Program** application ribbon.
2. Click the plus sign icon to expand the **Activities/Enrollments/Services** ribbon. Any activities added previously display in a table from which staff can view and modify the activities (see below).

Activities / Enrollments / Services 3

Create Activity / Enrollment / Service

Search

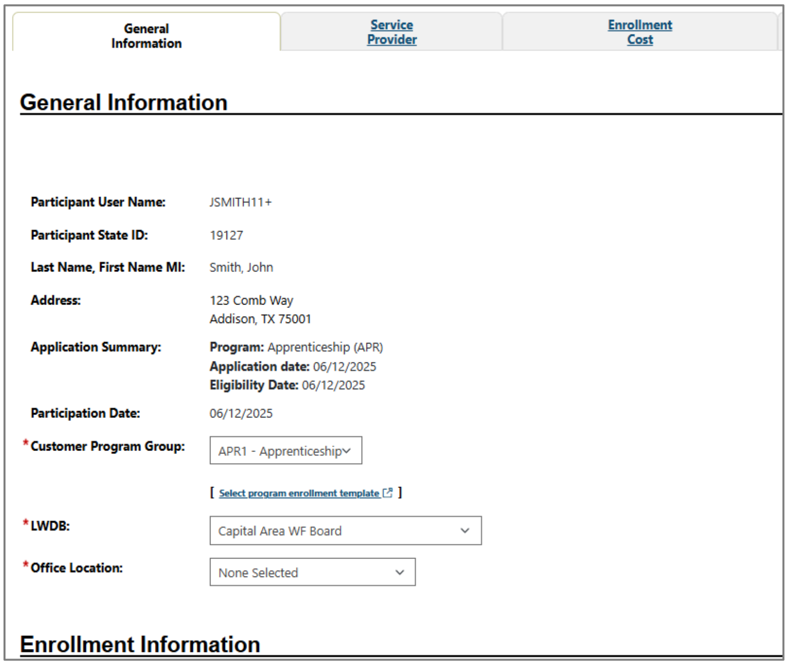
PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
		O	13812	301 - On-The-Job Training Texas Apprenticeship Provider	W	Apprenticeship	N/A	06/13/2025	06/13/2025	Close
		O	13811	903 - Related Technical Instruction Texas Apprenticeship Provider	W	Apprenticeship	N/A	06/13/2025	06/13/2025	Close
		O	13784	902 - Pre-Apprenticeship Texas Apprenticeship Provider	W	Apprenticeship	06/12/2025	06/12/2025	06/12/2025	Close

Activities/Enrollments/Services Ribbon with Existing Activities

3. Click the **Create Activity / Enrollment / Service** link to create an activity or click the wizard icon in the Actions column to update an existing one. The Activity Enrollment wizard displays on the **General Information** tab.

General Information Tab

The General Information tab records basic information about the individual, assisting staff member, and service the individual is seeking. Selections made on this first tab determine the available activity/service codes, service providers, and services, courses, or contracts available in later steps.



Activity Enrollment Wizard - General Information Tab

1. The **LWDB and Office Location** determine the list of services and activities displayed in the next section. Select the **LWDB** and the **Office Location** from the drop-down menu.
2. Click the **Select Activity Code** link to open an activity list, and then click an activity link to select it. The **Activity Code** and description fields are populated.

3. If you have an **Actual Begin Date**, enter that. If this is the first enrollment activity, it defaults to the participation date and cannot be changed.

4. If you have a **Projected Begin Date** for the service, enter it. If this is the first enrollment activity, it defaults to the participation date and cannot be changed. If this is for a follow-up service, this must be later than the closure date.

Note: You must enter either a projected or actual begin date.

5. Enter the **Projected End Date**.

Note: Your site's service code configuration may prevent you from entering a projected end date that exceeds defined parameters; for example, if the defined duration of an activity/service cannot exceed 90 days, the system will prevent you from saving a projected end date 91 days or greater than the actual start date.

6. Select the **Reporting Grant**. If there is only one grant available, then it will be preselected for you.

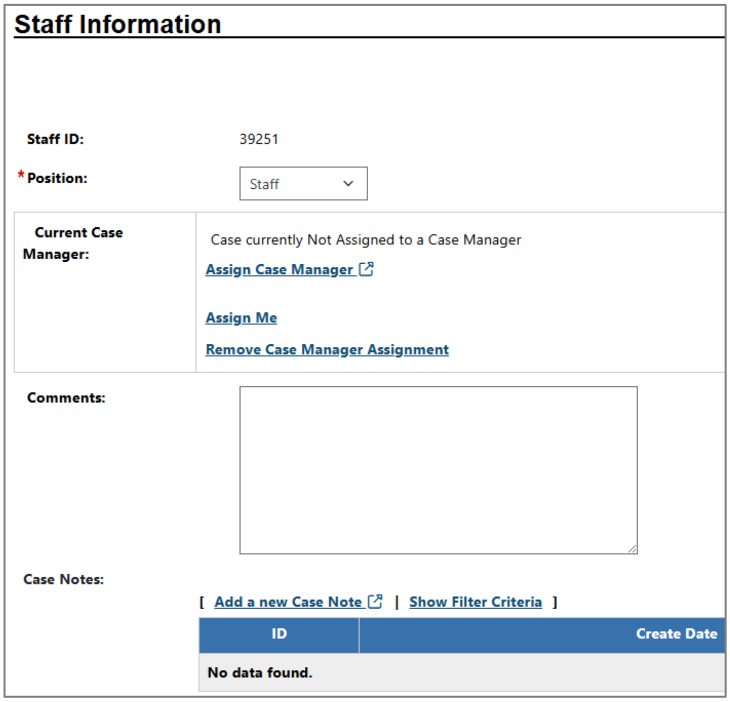
7. Service codes that are registered apprentice services require that the **Registered Apprentice RAPIDS#** be completed. Enter the **Registered Apprentice RAPIDS#**.

8. Enter the **Wage per hour on date of entry into Apprenticeship**.

9. Select the applicable checkboxes for **Service is Funded/Co-Funded by**. You can select up to 3 that apply.

10. Select the **Apprenticeship Program Type**.

11. In the **Staff Information** section, confirm or select your **Position,** if applicable.



General Information Tab - Staff Information Section

12. Click **Next** to save the information and proceed to the next tab. The **Service Provider** tab opens.

13. Confirm the **Provider** and **Service, Course or Contract** information. If they're not prepopulated, click the **Select Provider** and **Select Service, Course or Contract** link to add the required information

14. The **Occupational Training Code** may or not be required depending on whether an Occupational Training code was already preselected for the provider. If it is required and it is not prepopulated, click the **Occupational Training Code** link and search for the applicable code by clicking the **Select**

Occupation From ONET Table. The **Occupation Quick Search** window opens. Enter the keyword and select the applicable occupation. The window closes and you will brought back to the **Service Provider** tab.

15. Click the **Next** button. The **Closure Information** tab opens.

16. Select the **Finish** button. You are brought back to the **Activities / Enrollment / Service** ribbon which displays the new service that was added.

Activity Enrollment Wizard - Service Provider Tab

1. To select a **Provider**, click the **Select Provider** link to view a list of service providers that match the data relationships established on the General Information tab (Customer Program Group, LWDB, Office, and Activity Service Code). Click on a Provider Name link to select it. If there is only one provider for the service, their name is prefilled.
2. To select a **Service, Course, or Contract**, click the **Select Service, Course or Contract** link to view a list of services the selected provider offers. Click on a name link to select the service. If there is only one service, course, or contract from that provider, it is prefilled.

Note: If the desired provider and/or service is not found, you can review the provider account (**Manage Providers ▸ Assist a Provider**) to ensure its information was properly set up. Examples of possible errors include a provider’s (or program’s) inactive status, the wrong provider type, the wrong program affiliation, or no provider services have been created.

3. To select the location of service delivery, click the **Select Provider Locations** link. Click on a location link to select it. If there is only one location for the provider, it is prefilled in the **Provider Locations** field.

4. To select a provider representative staff may contact for assistance, click the **Select Provider Contacts** link. Click on a name link to select it. If there is only one provider contact for the location, their name is prefilled in the **Provider Contacts** field.

5. If the selected provider and program requires additional details, such as **Unsubsidized Employment**, a Worksite Information section displays below the provider information.

    - Enter the **Worksite Name**, **Address** information, **Contact Name**, **Phone Number**, **Hourly Wage**, and **Weekly Hours**.

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

Note: The Enrollment Cost Tab, Financial Aid tab, Enrollment Budget tab, and Budget Planning tab screens are required for program services flagged as **fundable**. The system's fund tracking module tracks all fundable services but is reserved for future use. This means the system will bypass these **funding-related** screens and display the final tab screen titled Closure Information.

7. When you come to the Closure Information tab for a new activity, simply leave the fields blank and click **Finish**.

Tabs for Fundable Enrollment Activities

For sites that use the **Advanced Individual Fund Tracking** (AIFT) module to allocate funds for training Apprenticeship participants, the following funding-related tabs display for staff to document and track costs related to fundable activities/services:

- **Enrollment Cost Tab** – This tab screen is reserved for future use.
- **Financial Aid Tab** – This tab screen is reserved for future use.
- **Enrollment Budget Tab** – This tab screen is reserved for future use.
- **Budget Planning Tab** – This tab screen is reserved for future use.

Closing an Activity, Enrollment, or Service

The Closure Information tab of the Activity Enrollment wizard defines the outcome at the conclusion of the activity/service and is completed only when you are making a final closure of the activity/service enrollment or when you are transferring the account outside of the region.

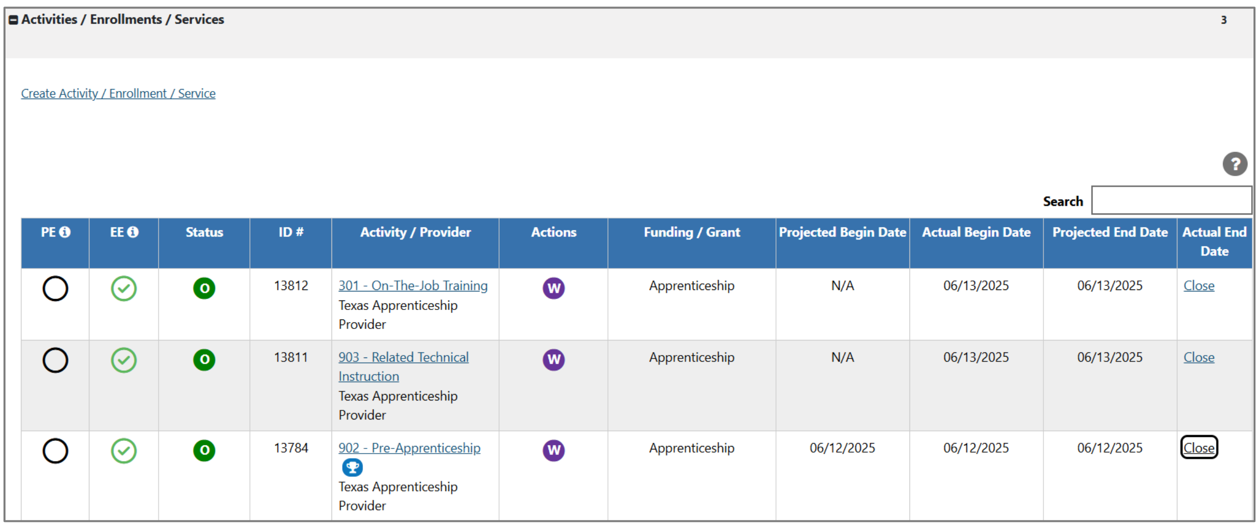
Note: If an activity is not yet complete and you come to this tab when adding a service, simply leave the fields blank and click **Finish**.

To close an activity/service:

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

2. Click the plus sign icon to expand their Apprenticeship Program application ribbon.

3. Click the plus sign icon to expand the Activities / Enrollments / Services ribbon. All previously added services are displayed in a table. Open activities have an **O** icon in the Status column (see figure below).


Activities / Enrollments / Services 3

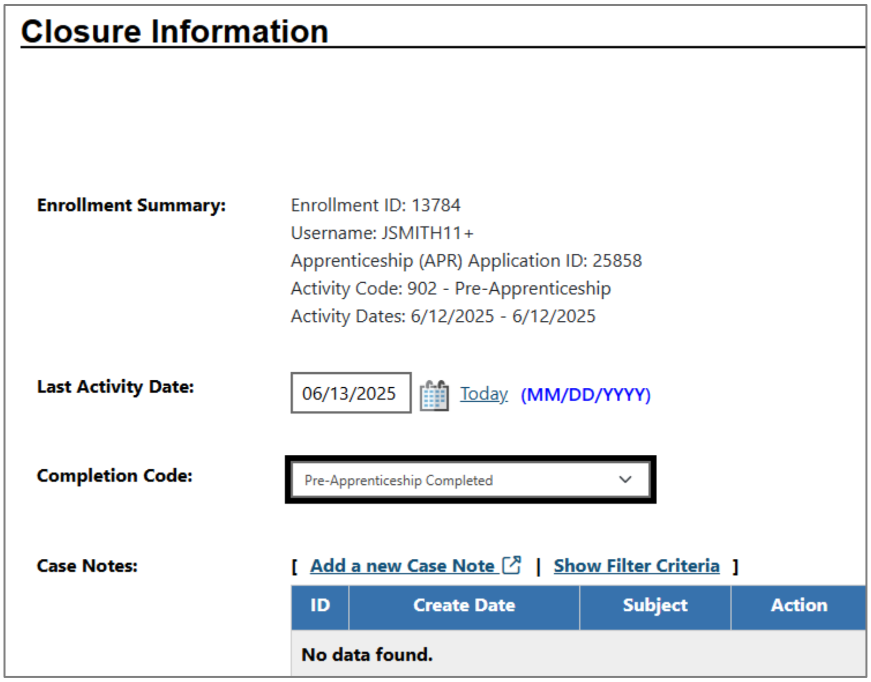
Create Activity / Enrollment / Service

Search

PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
		O	13812	301 - On-The-Job Training Texas Apprenticeship Provider	W	Apprenticeship	N/A	06/13/2025	06/13/2025	Close
		O	13811	903 - Related Technical Instruction Texas Apprenticeship Provider	W	Apprenticeship	N/A	06/13/2025	06/13/2025	Close
		O	13784	902 - Pre-Apprenticeship Texas Apprenticeship Provider	W	Apprenticeship	06/12/2025	06/12/2025	06/12/2025	Close

Activities/Enrollments/Services Ribbon with Existing Activities

4. Click the **Close** link in the **Actual End Date** column for the desired activity. The **Closure Information** tab displays (see figure below).



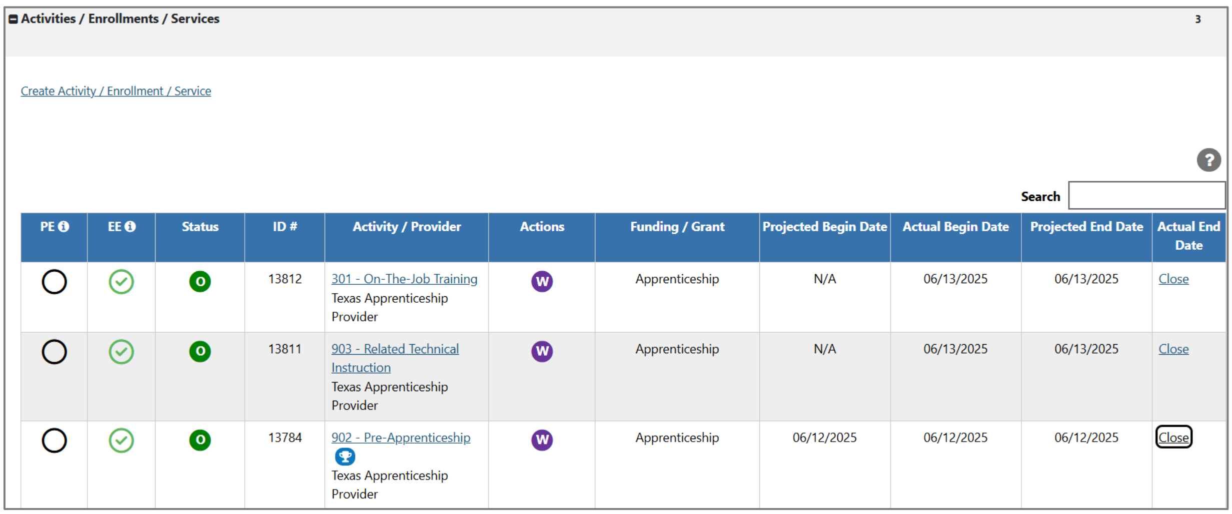
Closure Information Tab

5. Enter the **Last Activity Date**. This cannot be a future date.
6. Select the appropriate **Completion Code**.
7. To formally document the client's service enrollment record, click the **Add a new Case Note** link, complete the applicable fields, and click **Save** to return to previous page.
8. Click **Finish**. The Programs tab redisplays with the activity status closed in the Activities / Enrollments / Services ribbon of the Apprenticeship program container.

Note: Authorized staff may void an invalid enrollment activity/service; however, this does not apply to the first enrollment record, because that establishes program participation. Staff should seek assistance from their supervisor if they mistakenly documented the first program activity/service, and it cannot be edited to correct the mistake.

Managing the Apprenticeship Service Table

The WorkinTexas.com system displays various information in the service table to help staff manage program service details on behalf of the individual (see image below).



Activities / Enrollments / Services 3

Create Activity / Enrollment / Service

Search

PE	EE	Status	ID #	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
		O	13812	301 - On-The-Job Training Texas Apprenticeship Provider	W	Apprenticeship	N/A	06/13/2025	06/13/2025	Close
		O	13811	903 - Related Technical Instruction Texas Apprenticeship Provider	W	Apprenticeship	N/A	06/13/2025	06/13/2025	Close
		O	13784	902 - Pre-Apprenticeship Texas Apprenticeship Provider	W	Apprenticeship	06/12/2025	06/12/2025	06/12/2025	Close

Activities/Enrollments/Services Ribbon with Existing Activities

These include the following:

- **PE checkmark** – indicates whether the service triggers program entry, based on the characteristics assigned by the System Administrator.
- **EE checkmark** – indicates whether the service extends soft exit to avoid a 90-day lapse in service delivery, based on the characteristics assigned by the System Administrator.

- **Status** – indicates the status of the program service. The system displays a status legend at the bottom of the screen (see image below). Values include:
  - O = Open
  - C = Closed
  - S = System Closed
  - V = Voided

Status Legend at the Bottom of the Program Page

- **Activity/Provider** link – when staff selects this link, WorkinTexas.com presents the program service details in view mode.
- **Actions** link – when staff selects this link, WorkinTexas.com presents the program service details in edit mode. This is referred to as the Edit Wizard.

Note: This is the preferred view option for most staff users.

- **Funding/Grant** display – indicates the selected customer program group for the service.
- **Projected Begin Date** – displays the future start date entered for the service. The system displays N/A if no date was entered.

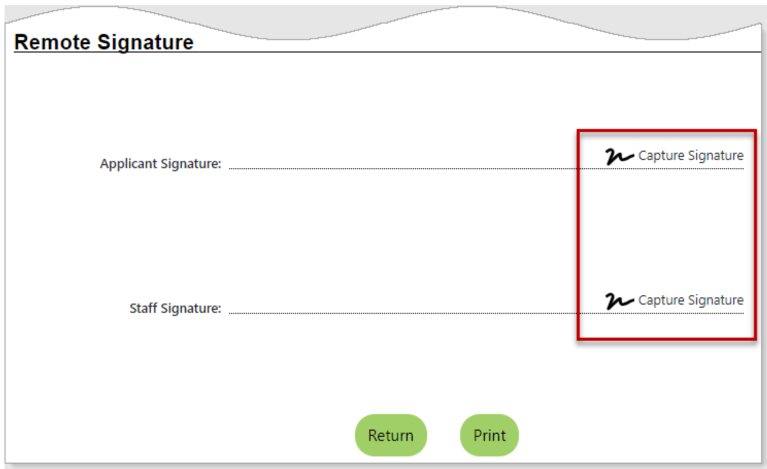
- **Actual Begin Date** – displays the actual start date entered for the service. The system prevents staff from entering a future date in this field.
- **Projected End Date** – displays the estimated end date entered for the service.
- **Actual End Date** – displays the actual completion date entered for the service. The system prevents staff from entering a future date in this field.

In addition to these informational displays, WorkinTexas.com also provides filtering tools to help staff manipulate the information shown. These include:

- **Search field** – enables staff to enter a keyword (for example, a service name) by which to search for and filter the current services displayed.
- **Page navigation controls** – enable staff to access the first, previous, next, and last pages displayed for multi-page service table.
- **Rows filter** – enables staff to increase the number of rows per page, thus decreasing the total number of pages displayed.

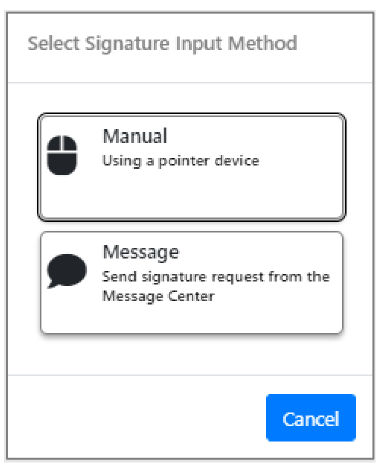
Capture Signature

Certain pages have the option to include signatures. To include Applicant and/or Staff Signatures, in the **Remote Signature** section, click the **Capture Signature** link for the desired person (see figure below).



Remote Signature Section of IEP Plan Page

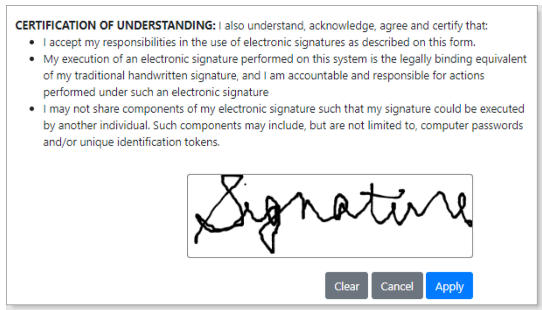
A pop-up window displays, where you select how the signatures will be obtained (see figure below).



Signature Capture Method Pop-up Window

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

ii. 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.



Signature Capture Window

iii. For a remote participant, click the **Message** icon. The Compose Message page displays, where you can create and send an Electronic Signature Request message (see figure below).

Apprenticeship Measurable Skills Gain Ribbon

Training Objectives

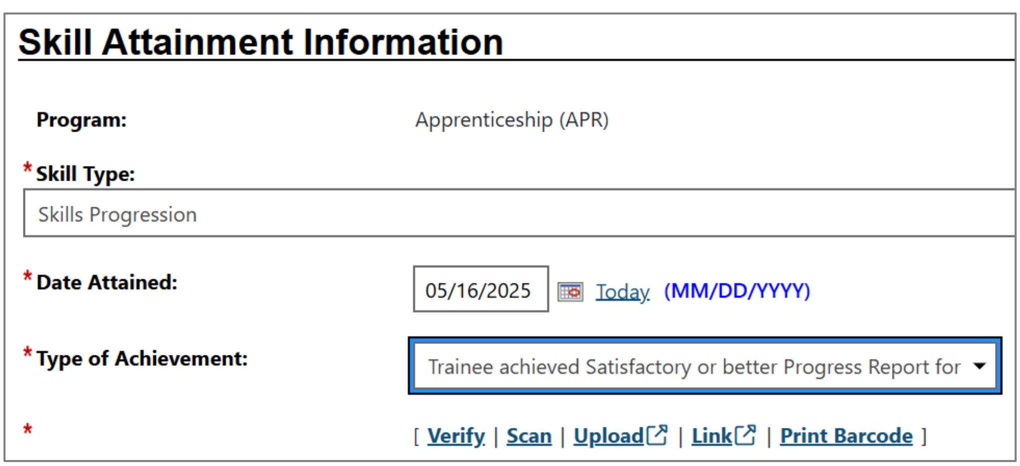
After completing this module, you will be able to:

- Navigate to the Measurable Skills Gain ribbon.
- Utilize the Measurable Skills Gain ribbon feature to record any skill and achievement type an Apprenticeship participant attained while in the program.

Add Measurable Skills Gain for Apprenticeship Program

To add Skills Gained for the Apprenticeship Program:

1. Select the **Create Measurable Skills Gain** link from the **Measurable Skills Gain** ribbon. The Skills Achievement page displays.
2. In the **General Information** section, select your **Office Location**.
3. In the **Skill Attainment Information** section, for **Skill Type** select the attained skill from the drop-down menu.



Skill Attainment Information

4. Enter the **Date Attained**.
5. For **Type of Achievement**, select the achievement type from the drop-down menu.
6. Click the **Verify** link. The **Skills Gain Achievement Type Verification** section appears.
7. Select the **Other Application Documentation** radio button and enter the documentation type into the field.
8. To attach an electronic copy of the document used for verification, click the **Upload** link. The **Add a Document** window will appear where you can attach the document.
9. Select the **Document Description** from the drop down menu.
10. Enter the **Document Tags.**
11. To attach the document, click the **Select File** button. A window will open where you can search for the document you want to attach.
12. Select the file from your computer and click the **Open** button.
13. Select the **Save** button. The window closes which brings you back to the **Skills Achievement** page.
14. Select the **Save** button. The Programs tab redisplays, with the skill listed in the **Measurable Skills Gain** ribbon table.

Apprenticeship Credentials Ribbon

Training Objectives

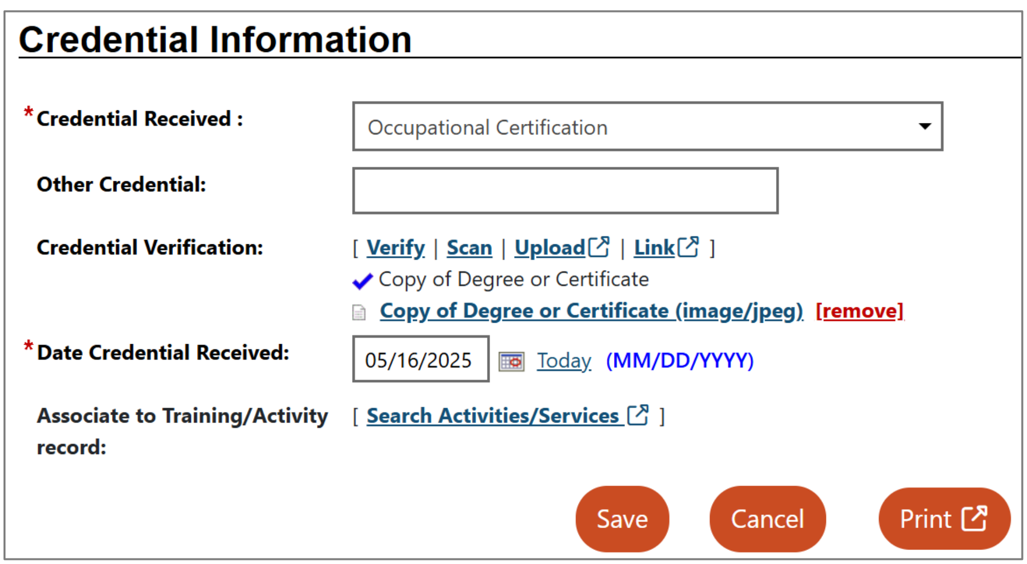
After completing this module, you will be able to:

- Navigate to the Apprenticeship Credential ribbon.
- Utilize the Apprenticeship Credentials Ribbon feature to record any educational or occupational credentials an Apprenticeship participant attained while in the program, which is used for federal reporting requirements.

Add Credential for Apprenticeship program

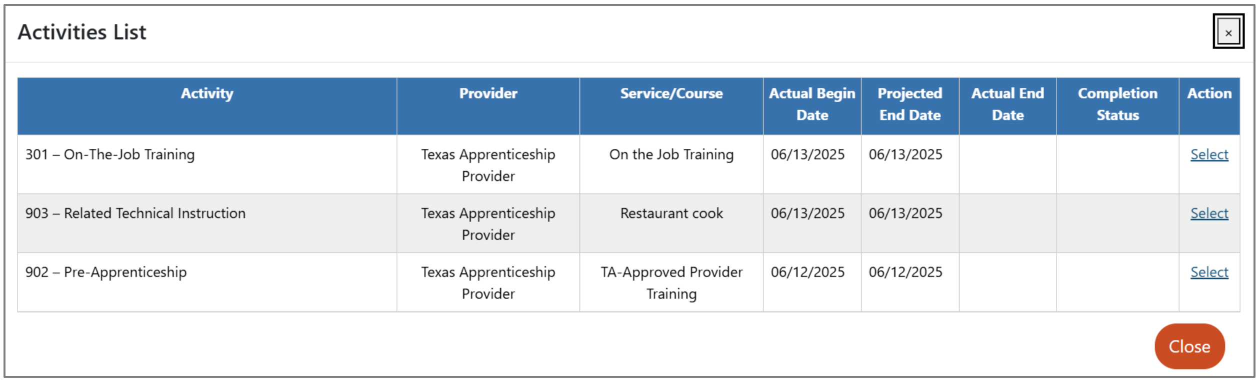
To add a Credential for the Apprenticeship Program:

1. Select the **Credentials** ribbon.
2. Select the **Create Credential** link. The **Case Credential** page displays.



Add Credential Screen

3. In the **General Information** section, select your **LWIA/Region** and **Office Location**.
4. In the **Credential Information** section, for **Credential Received** select the applicable credential received.
5. For **Credential Verification**, select the **Verify** link to identify the document being used for credential verification. Click the **Verify** link again to hide the list.
6. Click the **Upload** link to attach an electronic copy of the document used for verification. The **Add a Document** window will appear where you can attach the document.
7. Select the **Document Description**.
8. Enter the **Document Tags** information.
9. To attach the document, click the **Select File** button. A window will open where you can search for the document you want to attach.
10. Select the file from your computer and click the **Open** button.
11. Select the **Save** button.
12. 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
301 – On-The-Job Training	Texas Apprenticeship Provider	On the Job Training	06/13/2025	06/13/2025			Select
903 – Related Technical Instruction	Texas Apprenticeship Provider	Restaurant cook	06/13/2025	06/13/2025			Select
902 – Pre-Apprenticeship	Texas Apprenticeship Provider	TA-Approved Provider Training	06/12/2025	06/12/2025			Select

Close

Credentials Activities List Table

13. Under the **Action** column, click the **Select** link for the Activity you want this to be associated with.
14. Click the **Save** button. The Programs tab redisplays, with the credential listed in the **Credentials** ribbon table.

Apprenticeship Exit / Outcome Ribbon

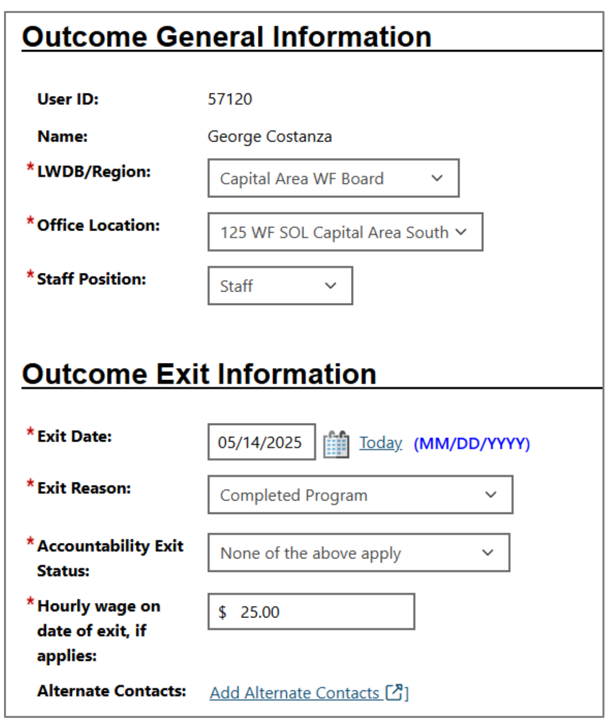
Training Objectives

After completing this module, you will be able to:

- Successfully complete the Exit/Outcome Form.
- Understand how to delete an Exit/Outcome form if necessary.

Note: You must close all open activities to be able to proceed with the exit/outcome. If you don't close open activities, a notification window will appear with the following message: The individual has open activities. Unable to create exit / outcome. See Page 77 of for instructions on how to close open activities.

1. Select the **Create Exit/Outcome** link from the **Exit/Outcome** ribbon. The **Outcome** page displays (see figure below).

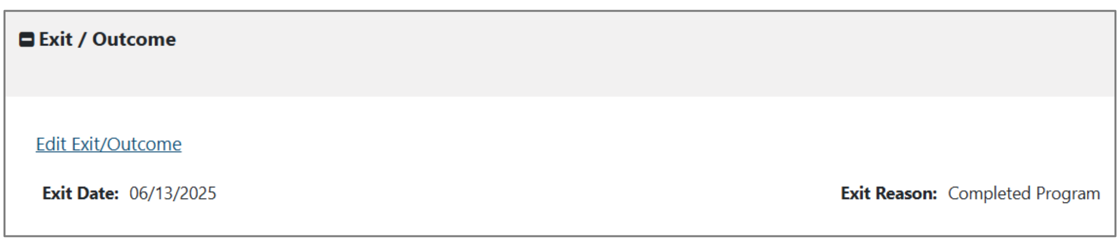


Exit / Outcome Form

2. The **LWDB/Region**, **Office Location**, and **Staff Position** are prepopulated.
3. Enter the **Exit** date (mm/dd/yyyy).
4. Select **Exit Reason** from the drop-down menu.
5. Select the **Accountability Exit Status**.
6. Enter the **Hourly wage on date of exit** if applicable.
7. Select the **Save** button.

Deleting Apprenticeship Outcomes

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



Edit Exit / Outcome Link

To delete this record, staff selects the **Edit Exit / Outcome** link. The **Delete** button is only available to authorized staff once the form has been saved. By deleting the form, the individual will return to their previous status.

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

Delete Button at bottom of Exit / Outcome Form

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

Apprenticeship Reports

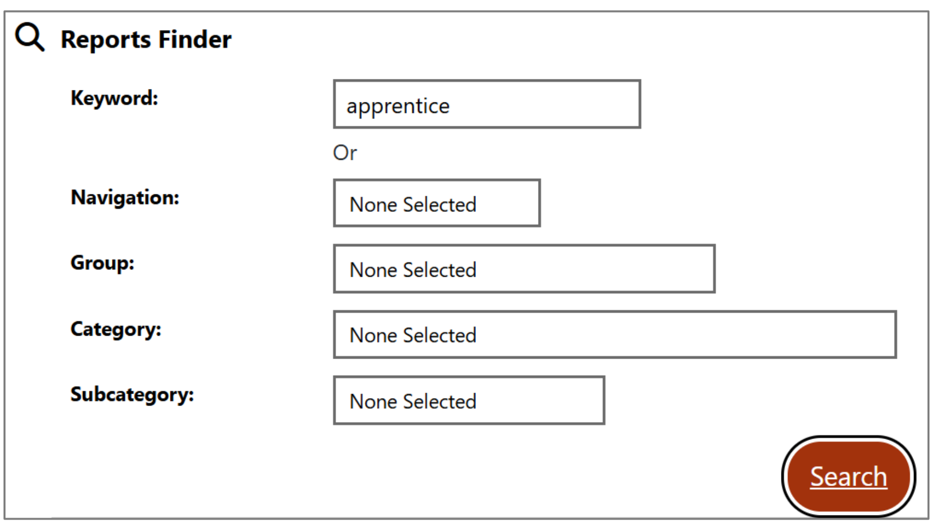
Training Objectives

After completing this module, you will be able to:

- Navigate to the reports page.
- Search for and view the available Apprenticeship Reports.
- Create Apprenticeship reports using the various filters available.

To access report 1 (Apprenticeship Participation Report):

1. Click the tribar or Menu link to open the left navigation menu.
2. Scroll down to the **Reports** section and select the **Reports** link.
3. Select **Reports Finder**. The Reports Finder fields appear.



Reports Finder Section

4. In the **Keyword** field, enter Apprentice. A table appears below with the different Apprenticeship reports.

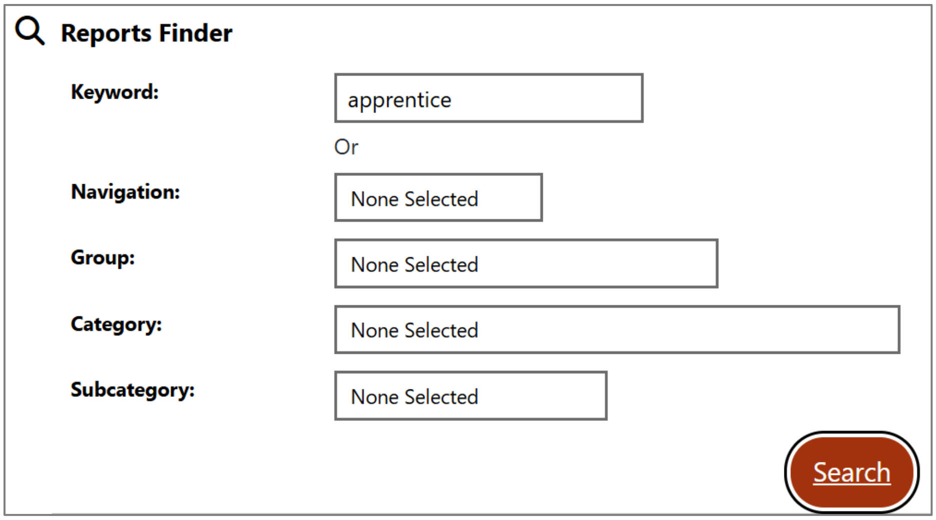
Report	Path	Description
Apprenticeship Participation	Detailed Reports - Case Management - Predictive - WIOA -	Predictive WIOA Apprenticeship Participation
Apprenticeship Reportable Individuals	Detailed Reports - Case Management - Predictive - WIOA -	Predictive Apprenticeship Reportable Individuals
by Registered Apprenticeship	Detailed Reports - Employer - Job Order - Internal -	List of all job orders by Registered Apprenticeship
Completed Apprentices	Detailed Reports - Employer - Registered Employer - Apprenticeship -	List of all Completed Apprentices
Current Registered Apprenticeship Interest by ONet	Custom Reports - Locally Developed - Iowa -	List of Current Registered Apprenticeship Interest by ONet
Current Registered Apprenticeship Sponsors	Custom Reports - Locally Developed - Iowa -	List of Current Registered Apprenticeship Sponsors
ETA 9173 - Apprenticeship	Federal Reports - WIOA Performance - Annual and Quarterly Summary -	ETA 9173 - Apprenticeship
Upload Reportable Individuals for Apprenticeship PIRL Reporting	Federal Reports - WIOA Performance - PIRL Reporting Assistant -	Upload Reportable Individuals for Apprenticeship PIRL Reporting

Apprenticeship Report Table

5. Select the **Apprenticeship Participation** link. The criteria selection page appears.
6. Scroll down to the **Date** selection criteria, enter 07/01/2024 into the **From** field and enter 08/01/2025 into the **To** field.
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 2 (Apprenticeship Reportable Individuals Report):

1. Select **Reports Finder**. The Reports Finder fields appear.

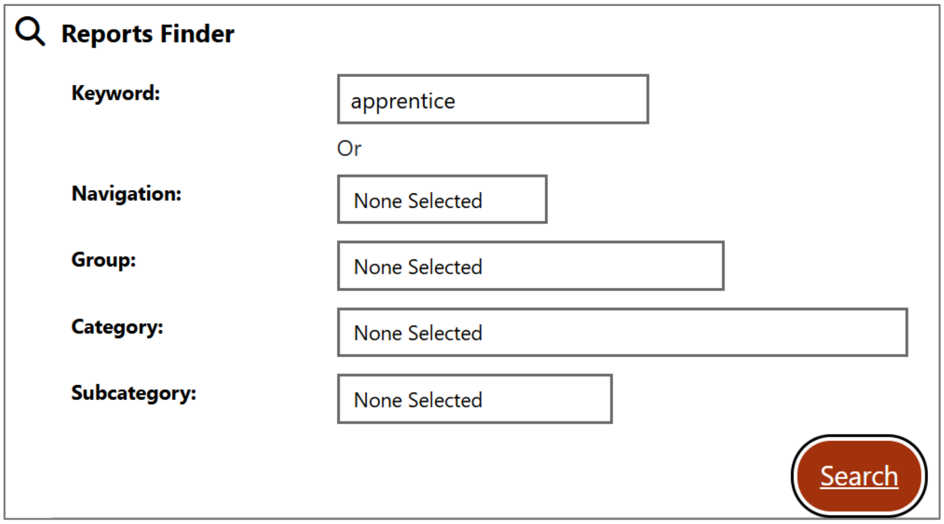


Reports Finder Section

2. In the **Keyword** field, enter Apprentice. A table appears below with the different Apprenticeship reports.
3. Select the **Apprenticeship Reportable Individuals** link. The criteria selection page appears.
4. In the **Date** selection criteria, enter 07/01/2024 into the **From** field and enter 08/01/2025 into the **To** field.
5. Click the **Run Report** button. The report details page appears.
6. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

To access report 3 (by Registered Apprenticeship):

1. Select **Reports Finder**. The Reports Finder fields appear.

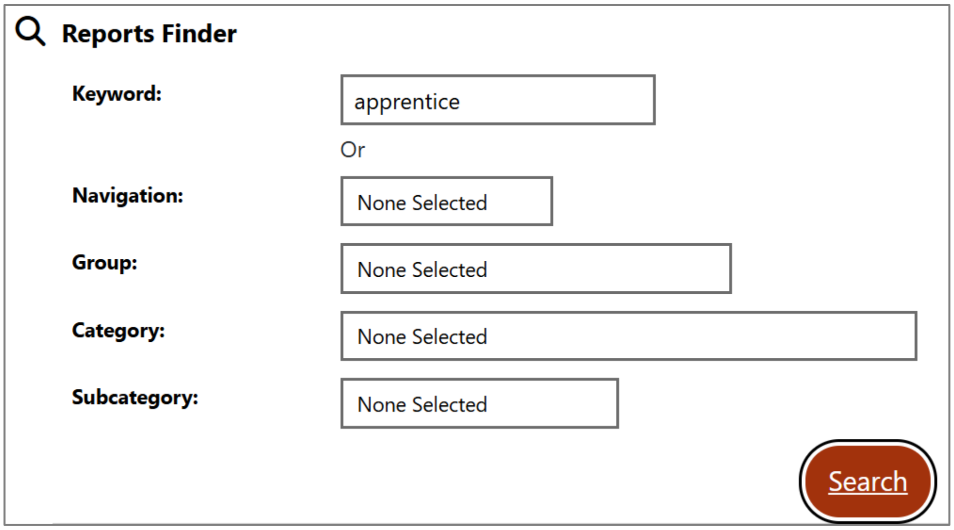


Reports Finder Section

2. In the **Keyword** field, enter Apprentice. A table appears below with the different Apprenticeship reports.
3. Select the **by Registered Apprenticeship** link. The criteria selection page appears.
4. Scroll down to the **Date** section and select Last 12 months for the **Date Range**.
5. Click the **Run Report** button. The report details page appears.
6. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

To access report 4 (Completed Apprentices):

1. Select **Reports Finder**. The Reports Finder fields appear.

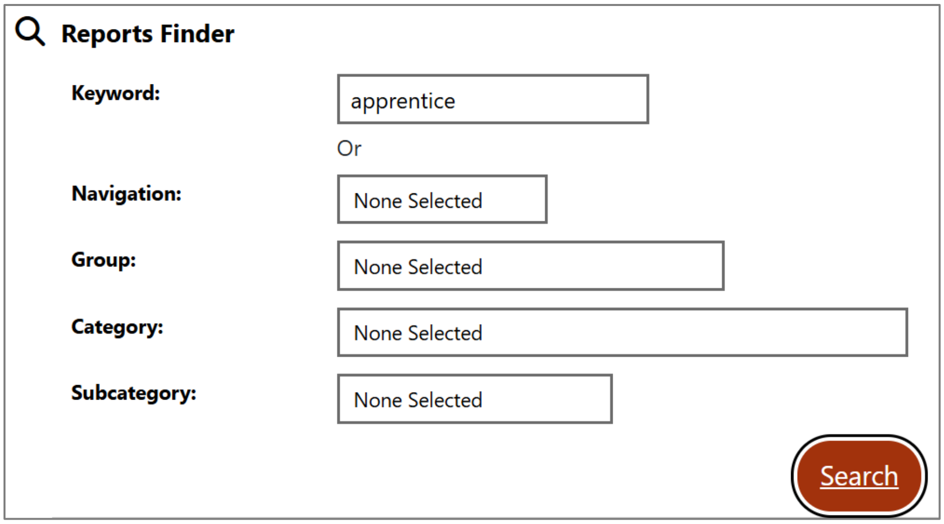


Reports Finder Section

2. In the **Keyword** field, enter Apprentice. A table appears below with the different Apprenticeship reports.
3. Select the **Completed Apprentices** link. The criteria selection page appears.
4. Scroll down to the Date section and select Last 12 months for the **Date Range**.
5. Click the **Run Report** button. The report details page appears.
6. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

To access report 5 (Current Registered Apprenticeship Interest by ONet):

1. Select **Reports Finder**. The Reports Finder fields appear.

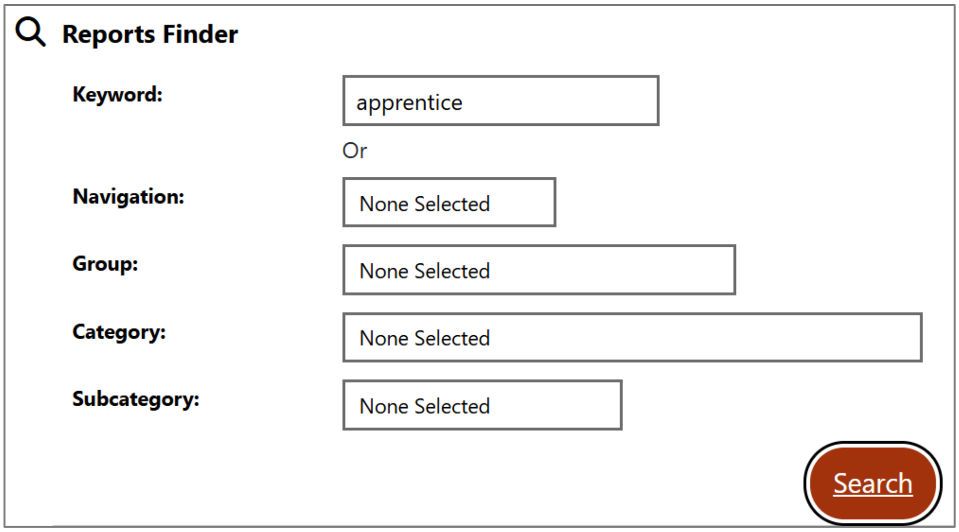


Reports Finder Section

2. In the **Keyword** field, enter Apprentice. A table appears below with the different Apprenticeship reports.
3. Select the **Current Registered Apprenticeship Interest by ONet** link. The criteria selection page appears.
4. Scroll down to the Date section and select Last 12 months for the **Date Range**.
5. Click the **Run Report** button. The report details page appears.
6. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

To access report 6 (Current Registered Apprenticeship Sponsors):

1. Select **Reports Finder**. The Reports Finder fields appear.

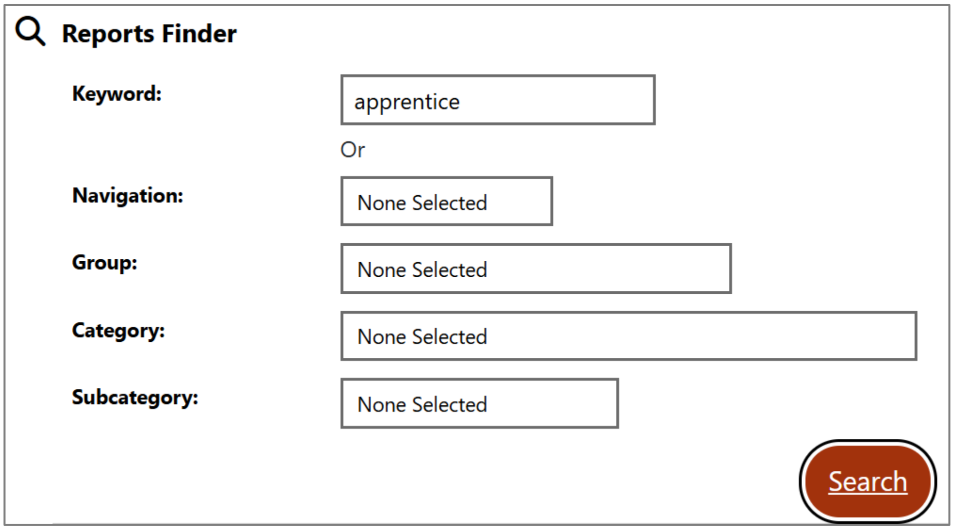


Reports Finder Section

2. In the **Keyword** field, enter Apprentice. A table appears below with the different Apprenticeship reports.
3. Select the **Current Registered Apprenticeship Sponsors** link. The criteria selection page appears.
4. Scroll down to the **Date** section and select Last 12 months for the **Date Range**.
5. Click the **Run Report** button. The report details page appears.
6. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

To access report 7 (ETA 9173 - Apprenticeship):

1. Select **Reports Finder**. The Reports Finder fields appear.

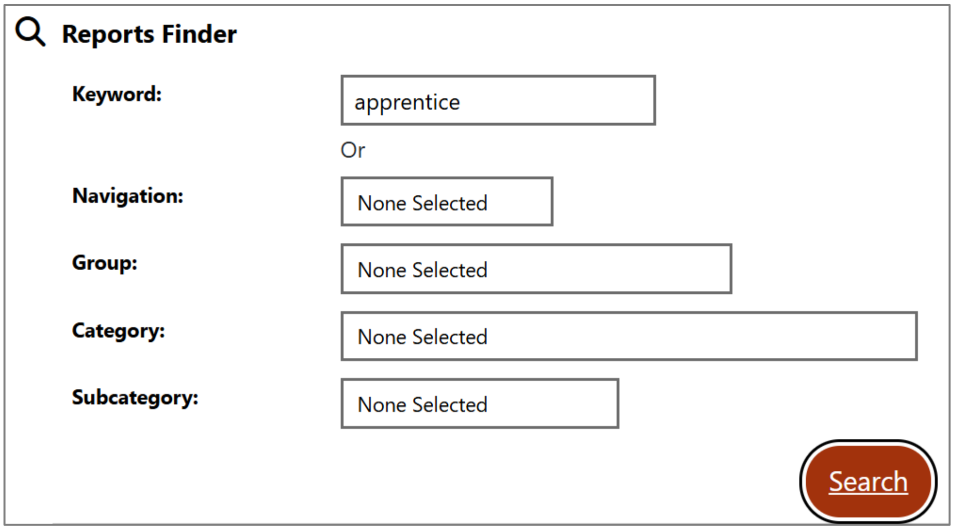


Reports Finder Section

2. In the **Keyword** field, enter Apprentice. A table appears below with the different Apprenticeship reports.
3. Select the **ETA 9173 - Apprenticeship** link. The criteria selection page appears.
4. Scroll down to the **Date** section and select Rolling 4 Quarters for the **Date Range Type**.
5. Click the **Run Report** button. The report details page appears.
6. Click the **Return to Manage Reports** button. This brings you back to the main **Reports** page.

To access report 8 (Upload Reportable Individuals for Apprenticeship PIRL Reporting):

1. Select **Reports Finder**. The Reports Finder fields appear.



Reports Finder Section

2. In the **Keyword** field, enter Apprentice. A table appears below with the different Apprenticeship reports.
3. Select the **Upload Reportable Individuals for Apprenticeship PIRL Reporting** link. The criteria selection page appears.
4. Click the **Reporting Period** drop down menu and select the period of interest.
5. Click the **Filter** link. The records table appears below.
6. Select the record link of your choosing.
7. The report details page appears.