

# 6: Programs: WIOA

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**Note:** This document is organized with a table of contents that links directly to each section.

- Keyboard-only users may press the **Enter** key on any entry in the table of contents to go directly to that topic.
- JAWS screen reader users may enable Quick Key Navigation (JAWS Key+Z) and then press the **H** key to jump by topic through the document. (The **Insert** key is the JAWS Key by default.)

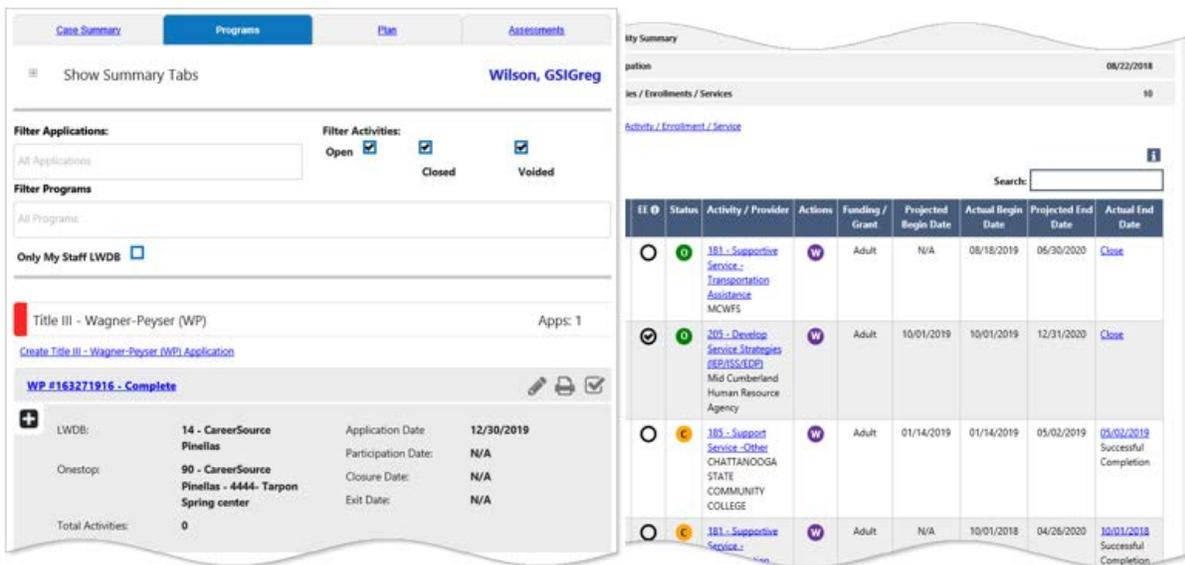
## WIOA Program Overview

Individuals who enroll in the Workforce Innovation and Opportunity Act (WIOA) program will undergo a process similar to the one outlined in the Wagner-Peyser topic – this includes creation of a WIOA Application, a Participation record, and then enrollment in activities and services that have WIOA-associated activity codes. Wizards help staff progress step-by-step through tabs to enter WIOA data, starting with tabs

for a WIOA application, based on the individual's date of birth, and selection of eligibility type and date in the first step of the application (e.g., Adult, Dislocated, and Youth).

The WIOA program eligibility has been streamlined for the new, approved WIOA legislation. Individuals who enroll in WIOA must undergo a process of creating an application and a participation record, and enrolling in activities. Staff will identify the eligibility type for which they are helping the individual apply. The system will determine eligibility at the end of the application process.

The applications, participations, and enrollments, as well as any additional entered employment, closures, outcomes, or follow up activities, are all available to staff members assisting individuals. (Some access may depend on staff's specific Admin privileges.)



WIOA Programs Tab

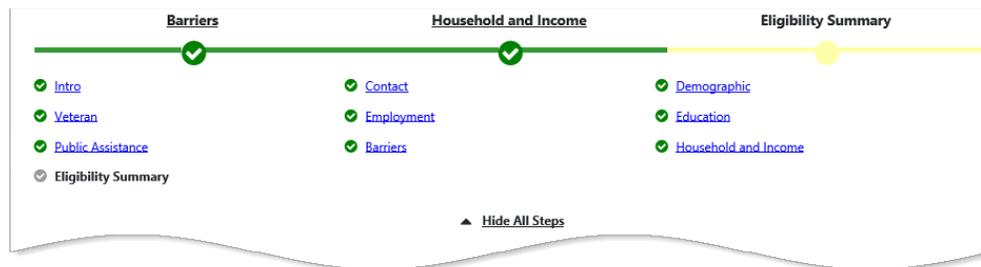
Staff can expand the WIOA Program line to start the WIOA Application (for a new applicant), and determine their eligibility for WIOA enrollment. For active participants, staff can expand additional lines to access all enrollments, activities, and other details. An overview of each form and related stages of WIOA program participation is included below.

**Note:** *The forms are listed in a suggested sequence. Your internal policies or customer business rules may require using the forms in a different sequence than listed below.*

- **WIOA Application Form** - For completed applications, this bar includes the Application wizard, Print and Validation icons, followed by the application # and status (e.g., WIOA # 12345678 – Complete). The plus sign icon expands the section to show basic App data, and section headings for the other forms. A progress bar is displayed as segments at the top of each page of the form. The steps included in each of the segments are listed below each label. Once the application form is complete:
  - Segment steps change to tabs.
  - Staff can start participation/enrollments for the individual.
  - Wizard, Validation, and Print icons display on the bar for easily maintaining the application from the Programs tab (see figure below).



Wizard Icons – Edit, Print, Verification Summary



*Wizard Progress Bar with Steps/Tabs displayed*

Enter data in each segment (e.g., contact, demographics, veteran, employment, education). Data entry begins at the Intro tab/segment. In WIOA, this includes selecting the Eligibility Type (and date), which is used for the rest of the application and the individual's WIOA eligibility determination.

- **Eligibility Summary** – The Eligibility Summary bar expands to show the individual's eligibility types and dates, as well as reasons for ineligibility where applicable. This section of the WIOA application displays a list of eligibility types and dates. The information in this section cannot be edited. The data is populated by the system based on determination of eligibility established during the enrollment process.
- **WIOA Participation Form** – The Participation bar expands to show the basic data for the Participation Record created at the end of eligibility determination, which is part of the program application. An [Edit Participation](#) link will open the full screen for managing the Case Participation Record. This form is used to gather final details of participant status (e.g., verifying employment and UI claim status) *before* you enroll a participant in WIOA activities or services. Completing this form will launch the page for enrolling in the first service.
- **WIOA Service/Activity Enrollments/Services Forms** - This bar expands to show a table for the activities/enrollments for the individual. A [Create Activity/Service/Enrollment](#) link above the table lets you create new enrollments (which are added to the table). WIOA enrollment is a series of tabs used to supply details of the activity in the WIOA participant's service record. The enrollment form allows you to enter/maintain groups of data (e.g., general, service provider, cost, financial aid, budget, and closure).
- Each entered service displays in a table below the WIOA Activity link, including the completion status, begin and end dates, and a link to modify the activity. For WIOA, activity records can be assessments of abilities, approved training activities, support services, etc.
- **Measurable Skills Gain Forms** – This form lets the staff record skills gain achievement data necessary for WIOA PIRL extracts and to calculate the WIOA Measurable Skill Gains performance measure.
- **Partner Programs Forms** – Using this form, you can record services received by the individual from any known partner programs during participation in WIOA.
- **Training Justification Form** – Allows you to provide documentation for the enrollment of the individual into a training activity as required by WIOA Section 134(c)(3)(A) and Section 134(c)(3)(B).
- **Literacy & Numeracy Forms** – This interface provides a data collection method to record pre-test data, and allows entry of multiple progress assessments for federal reporting purposes.
- **Youth Goals Form** – Use this form to record goals for youth in WIOA. Although not federally required (except under special circumstances), state or local business rules, or site configuration may require staff to document at least one youth goal on the individual's behalf before youth enroll in their second WIOA activity service.
- **Credentials Form** – Using this form, you can record academic and occupational credentials possessed by the user at the time of registration or obtained through participation in a specific program.

- **Employment Form** – Use this form to record employment details which may be used for a variety of reasons, including federal reporting and provider contract performance review.
- **Case Closure Form** - This form lets staff collect and record some program outcome data (for federal and local performance measures), after all activities have actual end dates, but before the program exited through standard soft exit or through a necessary hard exit for exclusion reasons.
- **Outcome (Hard Exit) Form** - This form lets staff officially terminate the participant involvement in WIOA for unpredicted reasons, such as death or hospitalization (known as *global exclusions*).
- **Follow-Up Forms** - This provides links for gathering additional details of the participant’s status at quarterly points after program exit (for Common Measures reporting).

Topics that follow the brief description of *Eligibility Types* (below) will describe the application tabs for each eligibility type, followed by the procedures for managing a WIOA participant – from their WIOA application, through participation form, and enrollment in WIOA activities (using example enrollments for non-funded and funded support services, and funded training activities). This all starts with topics for WIOA application for each eligibility type: Adult, Dislocated Worker, Youth, and Incumbent Worker.

**Note:** To watch different videos on Employer capabilities, select **Other Services** ▶ **Learning Center** from the Navigation menu, and select from the available videos. See Chapter 33 – Other Staff Services, for more on the Learning Center.

## WIOA Application Form

The WIOA Application for an individual begins in the same manner as an application for any other program. Expand the WIOA Program link, click the Create Application link, and work through each of the program tabs. The first screen displayed is the Intro tab, which displays as a segment of the WIOA application progress bar.

In WIOA, this Intro tab/segment includes identifying the program application date, as well as selecting the application type/group and the date for which the staff member is determining the eligibility for that type.



The screenshot shows a form with the following fields:

- Application Date: 01/02/2020
- Adult Eligibility Date: 01/02/2020 (Today)
- Dislocated Worker Eligibility Date: (Today)
- Youth Eligibility Date: (Today)
- Incumbent Worker Eligibility Date: (Today)

*Eligibility Type Selections on the Intro Tab*

There are four eligibility type selections on the Intro tab:

- Adult
- Dislocated Worker
- Youth
- Incumbent Worker Eligibility

In WIOA, the core and intensive activities are essentially combined into a ‘career services’ category in which you will have the flexibility to better meet the unique needs of individual job seekers. The sequencing of services is eliminated, as well as the determination of core or intensive before picking and eligibility type and moving past the first tab. The only rules controlling which of the four eligibility types staff can select are the age of the individual (when setting the date for the eligibility type), and any admin privileges set for the staff member.

The layout of this chapter on WIOA presents:

- A brief summary of WIOA eligibility types (below) and rules incorporated into the WIOA application tabs/segments – which you progress through to complete eligibility determination (shows on the last tab)
- A table of the WIOA application tabs per eligibility type
- Full, detailed topics and descriptions for application tabs (for each eligibility type)
- Full, detailed topics for creating participation, activity enrollments, and other areas of managing the WIOA application through to its closure.

**Tip** You can click on *Eligibility Type* (in both tables below) to skip to a section for that type. While the subtopics for *Adult* contain complete descriptions for all application tabs, descriptions in other topics focus on only the differences for those eligibility types. Enrollment tabs and forms are discussed after each application type.

## Summary of WIOA Eligibility Types and Requirements

Eligibility Type	Brief Description of Eligibility Requirements
<p><a href="#"><u>Adult</u></a> 18 or older</p>	<p>To be eligible to receive WIOA services as an adult (in the Adult and Dislocated Worker programs), an individual must:</p> <ul style="list-style-type: none"> <li>• Be 18 years of age or older;</li> <li>• Be a citizen or noncitizen authorized to work in the United States; and</li> <li>• Meet Military Selective Service registration requirements (males only).</li> </ul> <p>In WIOA the sequencing of services is eliminated. Both the WIOA career services and Intensive services are available to all adults and dislocated workers. You have the flexibility to determine services to better meet the unique needs of the individual job seeker, including all types of career services (career services, individualized career services, and follow-up services).</p> <p>However, individualized career services and training services must be given on a priority-of-service basis, regardless of funding levels, to:</p> <ul style="list-style-type: none"> <li>• Veterans</li> <li>• Individuals who are basic skills deficient</li> <li>• Public assistance recipients</li> <li>• Low-income adults</li> <li>• Other special priorities (e.g., other criteria defined by workforce boards)</li> </ul> <p>As you progress through the tabs, data is collected to determine eligibility as well as to identify priority levels, including factors such as family and family income.</p> <p>On the last tab, you can consider other priorities. Workforce boards can establish criteria for other priorities, including resources and funds for providing career and training-related services in the workforce area, as well as the needs of specific groups in the workforce area and other factors the Board determines appropriate.</p>
<p><a href="#"><u>Dislocated Worker</u></a> 18 or older</p>	<p>To be eligible to receive WIOA services as a dislocated worker (in the Adult and Dislocated Worker programs), an individual must:</p> <ul style="list-style-type: none"> <li>• Be 18 years of age or older;</li> <li>• Be a citizen or noncitizen authorized to work in the United States</li> <li>• Meet Military Selective Service registration requirements (males only); and</li> <li>• Meet the definition of dislocated worker</li> </ul> <p>The requirements are identical to those for Adults, with the addition of meeting one of the criteria for dislocated worker, which are:</p>

Eligibility Type	Brief Description of Eligibility Requirements
	<ul style="list-style-type: none"> <li>• Has been terminated or laid off, or has received a notice of termination or layoff, from employment;</li> <li>• Is eligible for or has exhausted entitlement to unemployment compensation, or has been employed for a duration sufficient to demonstrate attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a state's UI law; and</li> <li>• Is unlikely to return to a previous industry or occupation (permanent layoff with no recall date).</li> </ul> <p>On the Employment tab, staff will see an additional Dislocated Workers section, including questions for six categories (that may can qualify the individual as dislocated) along with other Layoff and Dislocation Event fields.</p>
<p><b>Youth</b> 14-24 In School Youth (14-21) Out of School Youth (16-24)</p>	<p>To be eligible to receive WIOA services as a youth, an individual must:</p> <ul style="list-style-type: none"> <li>• Be a citizen or noncitizen authorized to work in the United States</li> <li>• Meet Military Selective Service registration requirements (if male and 18); and</li> <li>• Meet the ISY or OSY youth definition</li> </ul> <p>An <i>Eligible Youth</i> in WIOA means an In-School Youth (ISY) or an Out of School Youth (OSY). Staff can check the Youth Eligibility box for any individual under 24. However, the tabs which staff must complete for eligibility will include data used to make an In-School Youth (ISY) or an Out of School Youth (OSY) eligibility determination.</p> <p><b><u>In-School Youth</u></b></p> <p>An In-School Youth (ISY) must be aged 14-21, attending school (as defined by State law), low income, and meet one or more additional conditions, which could include:</p> <ul style="list-style-type: none"> <li>• Basic skills deficient</li> <li>• An English language learner</li> <li>• An offender</li> <li>• A homeless child or youth, a runaway, in foster care, or has aged out of the foster care system, a child eligible for assistance under §477 of the Social Security Act</li> <li>• Pregnant or parenting</li> <li>• Disabled; or</li> <li>• Requires additional assistance to enter or complete an educational program or to secure or hold employment</li> </ul> <p><b>Note:</b> <i>The emphasis in WIOA is on employment for OSY. Per the U.S. DOLETA, WIOA Youth Program Fact Sheet, "WIOA requires a minimum of 75 percent of State and Local youth funding to be used for Out-of-School Youth." No more than 5 percent of ISY served in the workforce area may be deemed eligible because of the "additional assistance" criteria described in the last bullet, above.</i></p> <p>On the Education tab, in Youth applications, you will see specific questions if the individual is attending school, along with additional questions that will identify if they are ISY or OSY.</p> <p><b><u>Out of School Youth</u></b></p> <p>Out-of-school youth must be aged 16-24, not attending any school (as defined under State law), and meet one or more additional conditions, such as:</p> <ul style="list-style-type: none"> <li>• School dropout</li> </ul>

Eligibility Type	Brief Description of Eligibility Requirements
	<ul style="list-style-type: none"> <li>• Within age of compulsory attendance but has not attended for at least the most recent complete school year calendar quarter</li> <li>• Holds a secondary school diploma or recognized equivalent and is low-income and is basic skills deficient or an English language learner; subject to the juvenile or adult justice system</li> <li>• A homeless child or youth, a runaway, in foster care, or has aged out of the foster care system, a child eligible for assistance under §477 of the Social Security Act</li> <li>• Pregnant or parenting</li> <li>• An individual with a disability; or</li> <li>• Low income person who requires additional assistance to enter or complete an educational program or to secure and hold employment</li> </ul> <p>The emphasis in WIOA funding for youth is on employment of Out of School Youth (OSY). On the Education tab, you will see specific questions that will identify if the individual is ISY or OSY. Depending on the answers on the Education tab, and on other tabs, the eligibility matrix which displays on the last tab may include Exception/Limitation indicators. Depending on privileges, you may be able to select to service the individual under the 5% exception.</p>
<a href="#"><u>Incumbent Worker</u></a>	<p>In WIOA, any Incumbent Worker Services which may be handled through separate Grant funds for Incumbent Worker require you to apply for this eligibility type. There are fewer application tabs, and the information is shared in the tabs (as it is for the other WIOA Eligibility Types). In other words, if the individual is already an eligible Adult for WIOA, all tabs may be filled in, but you must still identify the Incumbent Worker Eligibility Start Date and walk through the minimum tabs to confirm they are complete.</p>

### Summary of WIOA Tabs per Eligibility Type

The same number of tabs will display for a WIOA application for each of the three main eligibility types (Adult, Dislocated and Youth), as indicated in the table below. However, the eligibility type will determine differences for data on some of the tabs. The table is a quick list of the tabs, and how they differ for each eligibility type.

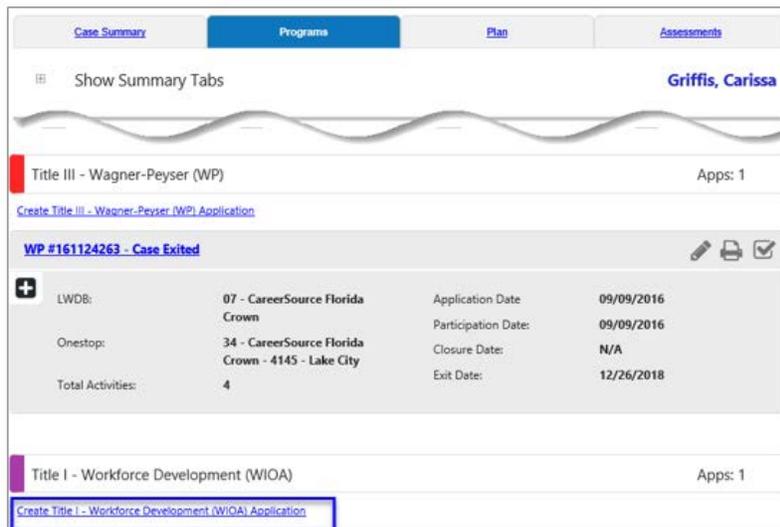
Tab	<u>Adult</u>	<u>Dislocated Worker</u>	<u>Youth</u>	<u>Incumbent Worker</u>
<b>Start</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>
<b>Contact</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>
<b>Demographics</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>
<b>Veteran</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes (1)</b>	<b>Yes</b>
<b>Employment</b>	<b>Yes (2)</b>	<b>Yes (3)</b>	<b>Yes (4)</b>	<b>Yes</b>
<b>Education</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes (5)</b>	<b>Yes</b>
<b>Public Assistance</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes (6)</b>	<b>No</b>
<b>Barriers</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes (7)</b>	<b>No</b>
<b>Family Income</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>	<b>No</b>
<b>Miscellaneous</b>	<b>Yes (8)</b>	<b>Yes (8)</b>	<b>Yes (8)</b>	<b>No</b>
<b>Eligibility and Grants</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>

(1) For Youth, response is only required if a male veteran (otherwise can click Next immediately).

- (2) For Adult, no dislocation/termination category question displays on the Employment tab.
- (3) For DW, a Dislocated Worker area displays (bottom of tab) with 9 category questions, plus Layoff and Rapid Response fields.
- (4) For Youth, only the first drop-down field is required, if "not Employed" is selected.
- (5) For Youth, additional questions exist for In-School vs. Out-Of-School Youth.
- (6) For Youth, additional questions exist for child care, high-poverty area, lunch program.
- (7) For Youth, additional questions exist under Individual Barriers for drop-out, runaway, foster care, parenting, and others.
- (8) This tab only displays if site-specific fields are configured for your system.

## Starting a WIOA Application

Create an application by clicking the [Create Workforce Innovation and Opportunity Act \(WIOA\) Application](#) link from the Programs tab. This opens the Intro tab/segment of the application. After they complete the Intro tab, information in the link on the Programs tab is updated (as shown in the following figure), even if the application is not completed. Once the Intro page is completed, icons display in a gray bar program bar for Edit Application, Print Application, and Verification Wizard.



*WIOA Links for starting an application or for continuing an incomplete application*

Steps below briefly indicate how you begin the WIOA application wizard. Go to the topic for each eligibility type to see details on application tabs for that type.

### ► To create a WIOA Application

- 1 Under the WIOA bar, on the Programs tab, click the [Create Title I - Workforce Development \(WIOA\) Application](#) link (as shown above). The Intro tab displays.

**Note:** *The top of the each page initially displays segments of a progress bar to identify the progress for stepping through each tab, gathering basic data, and helping to determine customer eligibility for the WIOA program.*

- 2 Enter the application date.
- 3 Select the desired eligibility type (from the four possible WIOA eligibility types).
- 4 Enter an application date in the date field which displays specifically for that eligibility type.
- 5 Select the location information for Local Area, Office Location of Responsibility, and standard Office Location.
- 6 Click **Next** to continue to the Contact tab.

**Note:** After the application is started, the Intro segment shows as complete (green circle with a checkmark). The Program tab will include a WIOA application link that can be used to continue the application entry later, or to review data after completion (as shown below for a partially complete application).



Green Intro Tab in the Progress Bar

After completing the Intro tab, you will continue through the other tabs/segments of the application whose fields and requirements are adjusted based on your selected WIOA eligibility type(s).

The Intro tab and the other application tabs are described in the following major topics, for each eligibility type. Each topic has subtopics that are specific to the tabs for that eligibility type.

**Tip** The topic for WIOA Adult application has the most details on the tabs that are common to all eligibility types. Other topics will describe the main differences in the tabs for that eligibility type, and reference the Adult application for details. E.g., Dislocated Worker includes details on the bottom of the Employment tab (for DW categories and layoff fields), but references the Adult topic for details on the top part of the Employment tab.

For **managing dislocated workers**, you may want to skip to the Dislocated Workers Eligibility topic. For **managing youth** (both in-school and out of school), you may want to skip to the Youth Eligibility topic.

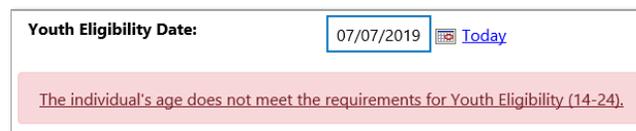
## Navigating the Wizard

- On each page, click the **Help** button to display instructions or information for completing the current page.
- When launched, the application wizard displays the Intro step. A progress bar remains at the top of the application through all of the steps to show progress through the application. The current step is indicated in bold. You can click the Hide All Steps link to hide the smaller list of steps; the current step of the progress bar remains. To re-display the steps, click the Show All Steps link.



WIOA Application Wizard Progress Bar, List of Steps, and Individual Detail Button

- When the Intro page first displays, all steps display as green and each step is a link. After advancing to the second step, Contact, the progress bar is yellow for the current step and only previous completed steps have links. It is recommended to follow the wizard steps in order so the system accurately determines eligibility.
- Click the **Individual Detail** button located below the individual's name to display key details about the individual such as username, email address, and phone number. Click the **Close Individual Detail** button to close the details display. **Case Notes** and **Comments** navigation buttons function in the same manner as the Individual Detail button.
- 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 screen.
- If a data entry violates a business rule or is incomplete, the system displays a notification in red below the applicable entry field. An example message for an unacceptable entry is shown below. Correct the entry and click the **Next** button to proceed.



The screenshot shows a form field labeled "Youth Eligibility Date:" with a date input containing "07/07/2019" and a "Today" button. Below the input is a red notification box with the text: "The individual's age does not meet the requirements for Youth Eligibility (14-24)."

*Example Notification of an Unacceptable Entry in a Data Field*

- Use the **Back** button to return to the previous step.
- Clicking the [Exit Wizard](#) link located at the bottom of each page exits the application. Data on the current page is not saved; only data entered through the previous page is saved.

### **The Partial Save Feature**

Starting with step 2 of the WIOA application, you have the option to click a box that says “*Check to indicate this is a partial application,*” as well as to select [Exit Wizard](#) (located at the bottom of each step).

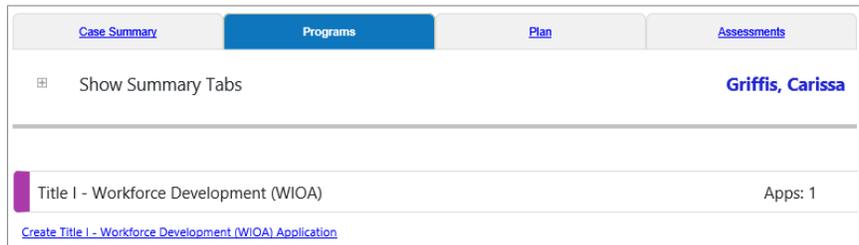
- **When staff members check the Partial Save box,** the system will bypass all business rules and lock-down rules (including the requirement to identify verification for certain fields). However, there are still minimum data requirements to successfully save the application as “partial” that include: LWIA, Name, Address, Phone Number, SSN, and Date of Birth. A partially saved application is considered **not complete** and no enrollment records can be created against this application. This feature is available and useful in the instances in which individuals have forgotten to bring necessary paperwork/documentation (although it is a defined requirement). Instead of canceling the application and exiting the wizard at the current step, all data available can be entered and saved and can be recalled when the individual returns with the necessary paperwork/documentation.
- **When staff members click the Exit Wizard link,** they cannot continue entering data beyond this point. They exit the application, saving only data up to the current step.

The link on the Programs tab for the WIOA Application will indicate the status, based on the selection or completion of the WIOA Application, in parentheses: (Partially Complete), (Incomplete), or (Complete).

### **WIOA Application for an Adult**

To be eligible as an adult, the individual must:

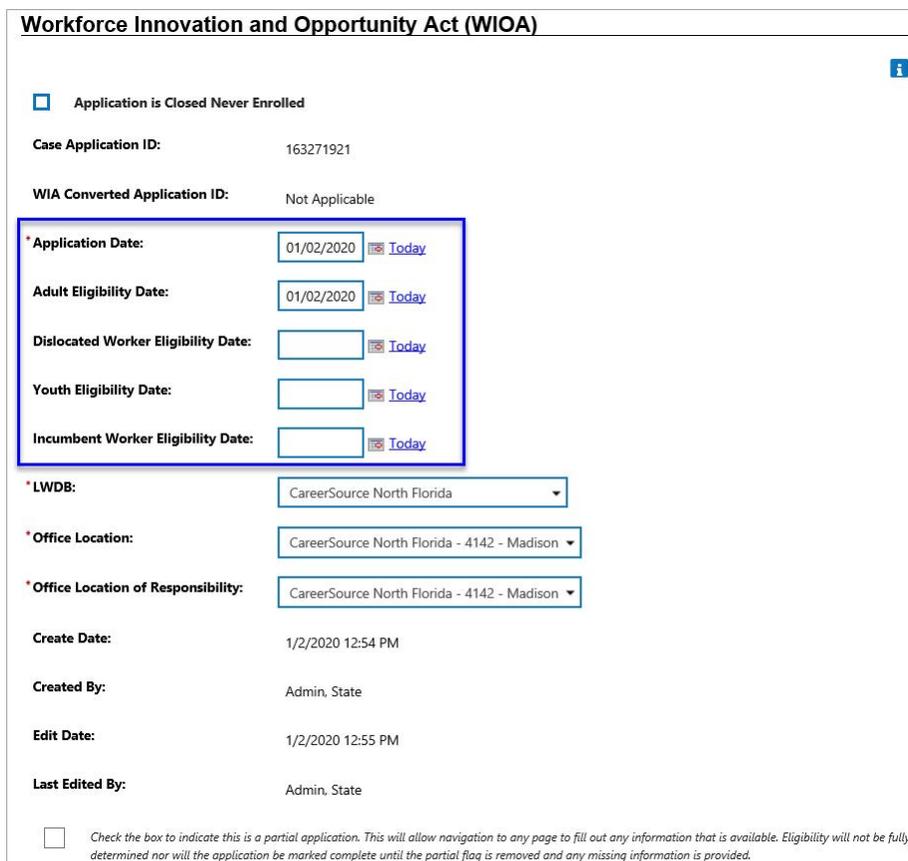
- Be 18 years of age or older
- Be a citizen or noncitizen authorized to work in the U.S.
- Meet Selective Service registration requirements (males only)



[Create WIOA Application Link](#)

► **To create an Adult Application:**

- 1 Under the WIOA Program bar on the Programs tab, click the [Create Title I - Workforce Development \(WIOA\) Application](#) link. The Intro tab displays (shown below).



[WIOA Application - Intro Tab for Adult](#)

- 2 To review the fields, click the **Individual Detail** button. The Individual Detail page displays the details collected during initial registration. These include User name and ID number, email, phone, state ID number and address.
- 3 Review the Currently Participating in fields. You can see other programs that may also be available for funding needed activities or services for the individual.

**Note:** *This area does not display if the individual is not already participating in any other programs (e.g., TAA).*

- 4 Enter the **Application Date**. The Application Date cannot be greater than X days ago (the lockdown date), nor be greater than today's date.
- 5 Enter an **Eligibility Date** for the applicable customer group option (e.g., Adult, Dislocated Worker, Youth, and Incumbent Worker). The Eligibility Date cannot precede the Application Date, nor be greater than today's date.

**Notes:** *In WIOA, this is not predetermined by Formula Program Eligibility, only by the individual's age at application.*

*The last field, WIA Converted Application ID, only displays an ID for converted records (i.e., those that have no Exit date OR Exit dates  $\geq$  7/1/2010). These will also have a "WIA Legacy Data" link on the Eligibility & Grants tab. See the topic "Seeing WIA Legacy Data on the Eligibility Tab" for more information.*

- 6 Select the location information for **LWDB, Office Location, and Office Location of Responsibility**.

**Note:** *Certain staff may have permissions set so that they can only apply for certain eligibility types (e.g., Adult or Dislocated Worker, but not Youth). Some may have permissions for which the eligibility date is editable, even for exited/closed cases.*

*If you click Exit Wizard, your data entry will NOT be saved. You must click Next at the Intro tab to save a partial application.*

- 7 If your data entry violates a business rule or is incomplete, the system will notify you via a red text message upon clicking **Next** (see following sample). Fix the error and click **Next** again to proceed.

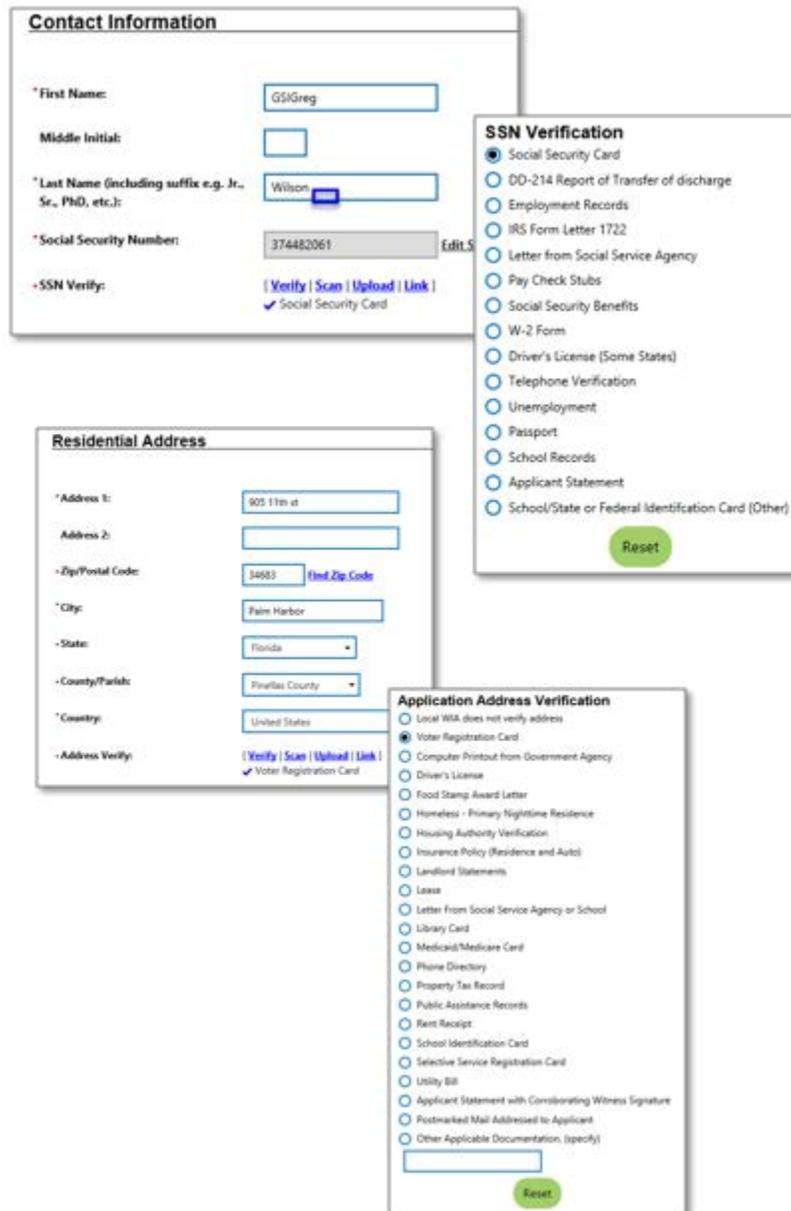
• You can not enter an "Eligibility Date" greater than Today's date!

*Error Notification Message*

**Note:** *To be eligible to receive WIOA services as an adult and/or dislocated worker, an individual must be 18. For individuals younger than 18, the Adult and Dislocated Worker eligibility selection boxes will be disabled.*

- 8 Click **Next** to save your edits and continue to the Contact Information tab.

**Contact Information Tab**



**Contact Information**

\* First Name:

Middle Initial:

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

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

- SSN Verify: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)  
 Social Security Card

**Residential Address**

\* Address 1:

Address 2:

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

\* City:

- State:

- County/Parish:

\* Country:

- Address Verify: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)  
 Voter Registration Card

**SSN Verification**

- Social Security Card
- DD-214 Report of Transfer of discharge
- Employment Records
- IRS Form Letter 1722
- Letter from Social Service Agency
- Pay Check Stubs
- Social Security Benefits
- W-2 Form
- Driver's License (Some States)
- Telephone Verification
- Unemployment
- Passport
- School Records
- Applicant Statement
- School/State or Federal Identification Card (Other)

[Reset](#)

**Application Address Verification**

- Local WIA does not verify address
- Voter Registration Card
- Computer Printout from Government Agency
- Driver's License
- Food Stamp Award Letter
- Homeless - Primary Nighttime Residence
- Housing Authority Verification
- Insurance Policy (Residence and Auto)
- Landlord Statements
- Lease
- Letter from Social Service Agency or School
- Library Card
- Medicaid/Medicare Card
- Phone Directory
- Property Tax Record
- Public Assistance Records
- Rent Receipt
- School Identification Card
- Selective Service Registration Card
- Utility Bill
- Applicant Statement with Corroborating Witness Signature
- Postmarked Mail Addressed to Applicant
- Other Applicable Documentation, (specify)

[Reset](#)

WIOA Application - Contact Information Tab with Verifications

► **To complete the Contact Information tab:**

- 1 Ensure that all required fields are entered.
- 2 Verify the SSN (identify verification document).

**Note:** The Edit SSN link is available only to staff with proper privileges.

- 3 Verify the **Residential Address** and identify the verification document.
- 4 Make additions or changes to Alternate Contacts using the Manage Alternate Contacts link, if appropriate.

**Note:** Depending on your system configuration, you may be required to use the Manage Alternate Contacts link and supply an alternate contact before the next step in the WIOA application. You can also click the checkbox (at the bottom of the screen) that allows you to save a partially completed program enrollment.

The address used on the initial application date will be included below the mailing address (disabled) when you return to this tab. You can click a link to change the address (if you have permissions set for this).

**Address on Date of Application**

Address 1:

Address 2:

City:

State:

County/Parish:

Zip/Postal Code:

Country:

Address Verify: [\[ Verify | Scan | Upload | Link \]](#)  
 Voter Registration Card

[Edit Application Address](#)

[Edit Application Address Link](#)

5 Click **Next** to save your edits and continue to the Demographics tab.

### Demographics Tab

The Demographics tab contains several fields for demographic information. Some of the available options on this application are dependent upon your system's configuration.

- If any custom Demographic fields were created specifically for your site (e.g., USCIS - Alien Registration number and expiration date), they will display when the configuration switch is turned on.
- The question, "Haitian Heritage" is an additional required field in WIOA.
- Many verification lists (such as the Citizenship Verification list connected to Authorization to Work in U.S.), may display different items depending on your site's configuration.

#### ► To complete the Demographic tab:

- 1 Enter the **Date of Birth** and select the verification method.
- 2 Specify the **Gender**.
- 3 Select the **U.S. Citizenship Status** and verification method.
- 4 If male, specify if the individual has **Registered for the Selective Service**.

**Note:** Selective Service registration and citizenship can play key roles in determining WIOA eligibility. If no customer program groups are selected at enrollment, you may need to confirm that these items were completed (and verified, if applicable).

- 5 Specify the individual's heritage and ethnicity.

### Demographic Information

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

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

**Today's Age:** 21

**WIOA Eligibility Age (at earliest eligibility):** 21

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

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

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

[Selective Service Website](#)

\* **Registered for the Selective Service:**

\* **Verify:** [\[ Verify | Scan | Upload | Link \]](#)  
 Selective Service Status Information Letter

**Selective Service Registration Number:**

**Selective Service Registration I**

\* **Hispanic/Latino Heritage:**  No  Did not self-identify

\* **Haitian Heritage:**  Yes  No  Did not self-identify

\* **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  Did not self-identify

**Verify:** [\[ Verify | Scan | Upload | Link \]](#)  
 Applicant Statement

Check the box to indicate this is a partial application. This will allow navigation to any page to fill out any information that is available. Eligibility will not be fully determined nor will the application be marked complete until the partial flag is removed and any missing information is provided.

*Demographics Tab*

- 6 Specify if the individual is **Considered to have a disability** and click the Verify link to specify the verification documentation method.

Selecting Yes will activate the Disability Category checkboxes and display additional questions (as shown at right of the image below).

**\* 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  Did not self-identify

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

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

**ry of Disability:**

- Physical/Chronic Health Condition
- Physical/Mobility Impairment
- Mental or Psychiatric Disability
- Vision-related disability
- Hearing-related disability
- Learning Disability
- Cognitive/Intellectual disability
- Participant did not disclose type of disability

**- Received services from a State Development Disabilities Agency (SSDA):**  SSDA  No  Unknown

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

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

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

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

**- Received Disability Financial Capability:**

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

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

*Demographics Tab - Disability Category Checkboxes*

The screenshot displays a web form with the following elements:

- Gender:** Radio buttons for Female, Male, and Did not specify.
- U.S. Citizenship Status:** A dropdown menu currently showing "Citizen of U.S. or U.S. Territory". A red box highlights this field, and a red arrow points to its dropdown menu.
- Verify:** Buttons for [Verify | Scan | Upload | Link]. A red arrow points from the "Verify" button to the "Birth Certificate" option in the dropdown menu.
- U.S. Citizenship Status Dropdown Menu:** A separate window shows the available options: "None Selected", "Citizen of U.S. or U.S. Territory" (highlighted in blue), "U.S. Permanent Resident", "Alien/Refugee Lawfully Admitted to U.S.", and "None of the above".
- Citizen Verification:** A list of verification methods with checkboxes:
  - Completed and Signed I-9 Form
  - Baptismal Certificate with Place of Birth
  - Birth Certificate
  - DD-214
  - Food Stamp Records
  - Foreign Passport Stamped Eligible to Work
  - Hospital Birth Record
  - Naturalization Certification
  - Public Assistance Records
  - United States Passport
  - Native American Tribal Document
  - Alien Registration Card Indication right to work
  - Telephone Verification
  - School/State or Federal ID Card
  - Documentation specified on the I-9 form
  - Social Security Card (Work Eligible)
  - Applicant Statement
- Reset:** A green button at the bottom of the verification list.

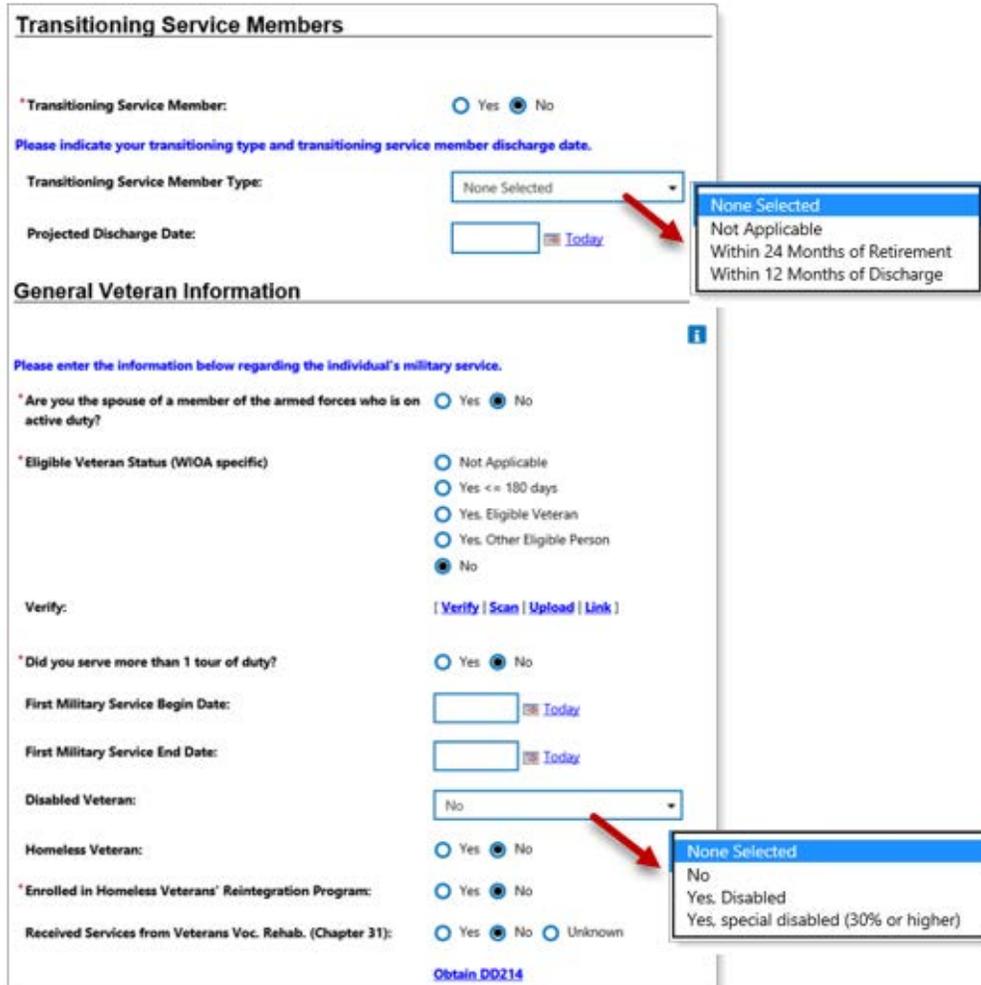
*WIOA Application - Demographics Tab – Verification and Document Upload*

With the *Document Management* module, you can upload the documents (as shown in the preceding figure), or if you have a scanner set up, you can scan images for the documents you use in verification. If your system offers the ability to scan or upload documents, you will still be required to select the appropriate verification fields. For details about acquiring document images, see the topic the topic, “In-Context Scanning, Linking, and Viewing” in Chapter 30 - Manage Documents.

- 7 Click **Next** to save your edits and proceed to the Veteran tab.

## Veteran Tab

The Veteran tab has two areas, Transitioning Services Members and General Veteran Information. If the individual is a transitioning service member or existing veteran, complete and verify information in each area that applies.



WIOA Veteran Tab

### ► To complete the Veteran tab:

- 1 If the individual is a **Transitioning Service Member**, select Yes.
  - a. Select their **Transitioning Service Member Type**.
  - b. Enter their **Projected Discharge Date**.
- 2 If the individual is an eligible veteran:
- 3 Select an Eligible Veteran Status.
- 4 Select the **Eligible Veteran Status** (with an appropriate type of documentation).
 

**Note:** Click the *Obtain DD-214* link to access the federal veterans' service records site.
- 5 If the veteran **served more than 1 tour of duty**, select Yes. This will display dates for up to three separate date ranges.
- 6 Enter date(s) for the tour(s) of duty.

- 7 If individual is a *Disabled* or *Special Disabled* veteran, select the *disabled* type.
- 8 If the veteran is homeless, click *Yes* for that question.
- 9 If they received services from Veterans Vocational Rehabilitation, click *Yes* for that question.
- 10 Indicate if a Campaign Veteran.
- 11 Indicate if the veteran separated within the last 48 months.
- 12 Indicate if the individual attended a **Transition Assistance Program (TAP)** within the last 3 years.
- 13 Click **Next** to save your edits and proceed to the Employment tab.

## Employment Tab

Use the Employment tab to define the individual's employment status and any employment history. Several of the items displayed are conditionally not required, however, staff should enter all data that applies, including verifications.

### Employment Information

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

\* Employment Status:

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

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

In a Registered Apprenticeship Program?  Yes  No  Did Not Disclose

\* UC Eligibility Status:

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

Claimant was referred by:

Claimant has been exempted from work search:

Date Claimant was exempted from work search:

\* Long Term unemployed (27 or more consecutive weeks):

Please enter the Wage and Onet Code for all applicants with current/previous employment.

Current or Most Recent Hourly Rate of Pay:

Occupational Code of most recent employment:  [Find Occupational Code](#)

### Individual Employment History

[View Background Summary](#)

Company Name	Location	Job Title (Occupation)	Start/End Dates	Action
No individual employment history records were found.				
<a href="#">Add Employment History</a>				

Check the box to indicate this is a partial application. This will allow navigation to any page to fill out any information that is available. Eligibility will not be fully determined nor will the application be marked complete until the partial flag is removed and any missing information is provided.

*Employment Tab for Adults – Employment History*

► **To complete the Employment tab:**

- 1 Select and verify an **Employment Status** .
- 2 If employment history is recorded, select from the Underemployed choices.
- 3 Identify the unemployment Eligibility status.
- 4 Identify if Long-term Unemployed applies.
- 5 Enter hourly pay rate.
- 6 Use the Search O\*Net link to identify the code.
- 7 In the Employment History section, identify relevant employment history.

**Note:** *This area displays any employment from the Background tab (in the individual's profile). If it is not current, updates should be added here.*

**Dislocated Worker:**

- This section of the page only displays if Dislocated Worker eligibility was selected on the Intro tab.

### Dislocated Worker

i

**Employment Status at Dislocated Worker Eligibility:**

None Selected

**Under-Employed at Dislocated Worker Eligibility:**

Yes
  No
  Not Applicable

**Dislocated Worker Category:**

**Category 1:** Terminated or laid off exhausted entitlements to UC, etc.

**Category 2:** Terminated or laid off sufficient duration (based on state) to insufficient earnings, or the previous industry or occupation.

**Category 3:** Individual is terminated as a result of the Permanent closure of the facility.

**Category 4:** Individual is employed at the facility will close. Enter the date of closure.

**Category 5:** Individual was previously employed due to general economic conditions. Record the last date of self-employment.

**Category 6:** Displaced Homemaker in the home and has been dependent on that income, or the dependent income is significantly reduced, change of station, or the service-connected underemployed and is experiencing a significant change in income.

**Projected Layoff Date:**  Today

**Actual Layoff Date (if date is in the future, please leave empty):**  Today

**Attended a Rapid Response Orientation:**  Yes  No

**Most Recent Date Attended Rapid Response Service:**  Today

**Rapid Response Event Number:** [Find RR Event](#)

[Search Individual Employment History](#)

**Dislocation Employer:**

**Employer Address 1:**

**Employer Address 2:**

**Employer City:**

**Employer State:**

**Employer Country:**

**Employer Zip:**

**Dislocation Hourly Wage:**

Check the box to indicate this is a partial application. This will allow navigation to any page to fill out any information that is available. Eligibility will not be fully determined nor will the application be marked complete until the partial flag is removed and any missing information is provided.

*Employment Tab for Adults – Dislocated Worker*

► **To complete the section:**

- 1 Select the applicable category and verify.
- 2 Enter the Layoff dates, Rapid Response information, and Employment information.
- 3 When finished, click **Next** to save your edits and proceed to the Education tab or click [Exit Wizard](#) to save a partial application.

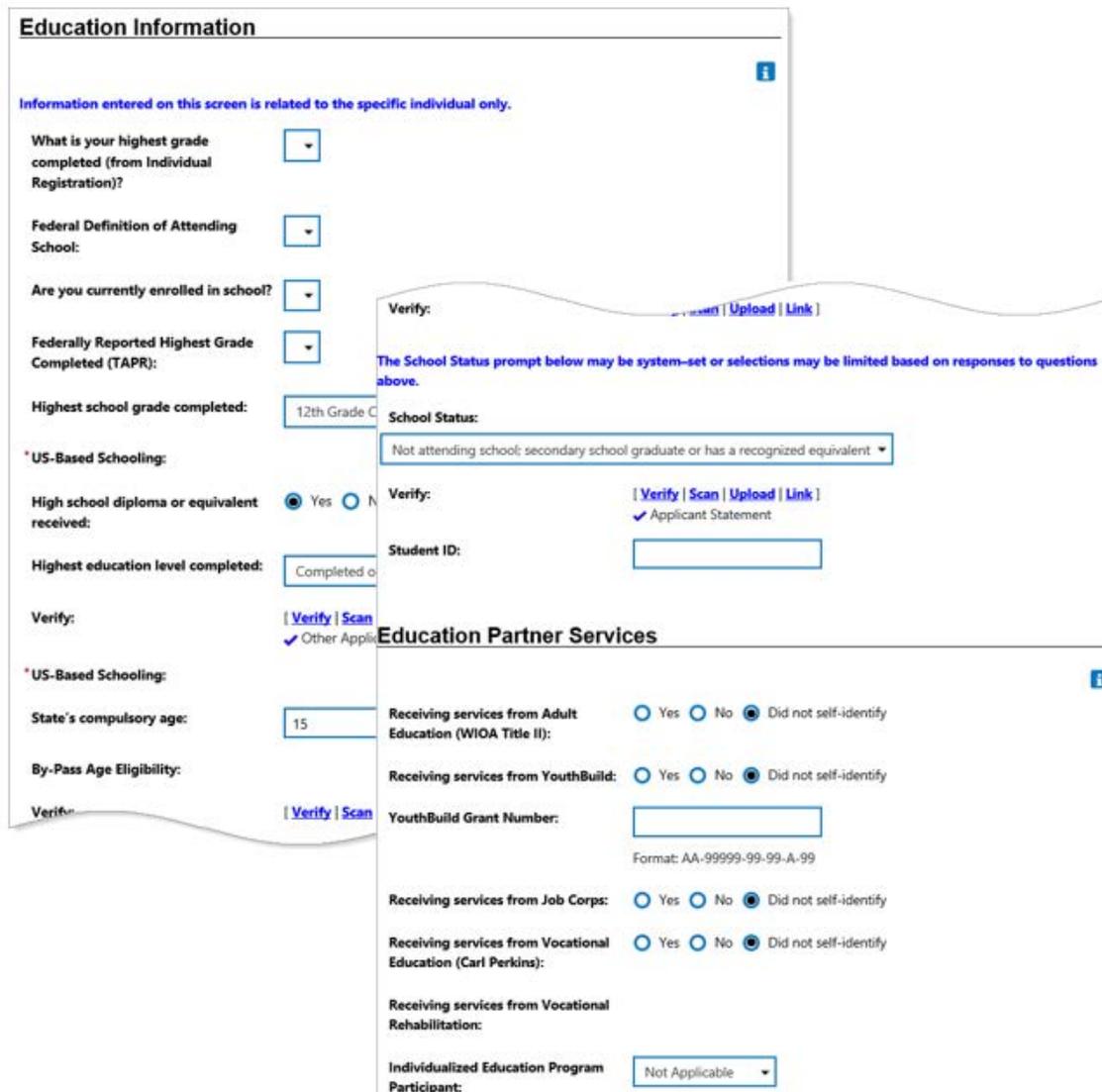
If you do not complete required fields, messages will display in red. For example, if you indicate employment and a notice of termination, but do not indicate verification, the following message will display.

- **Employment Status Verification is required.**

**Note:** If a notice of termination or separation was received, staff should also apply for Dislocated Worker eligibility (from the Intro tab). That will display a separate Dislocated Worker area on this tab, where staff can make selections to add eligibility for Dislocated Worker services. See Employment Tab for Dislocated Worker.

### Education Tab

Use this tab to define the individual's education, including high school level and highest education level, as well as any partner services for education. For Adult eligibility, this may include verifying fields already populated based on educational information gathered at registration. Data is organized in two sections: Education Information and Education Partner Services.



The screenshot shows two overlapping tabs from a WIOA application system. The top tab is titled "Education Information" and contains the following fields:

- What is your highest grade completed (from Individual Registration)? [Dropdown]
- Federal Definition of Attending School: [Dropdown]
- Are you currently enrolled in school? [Dropdown]
- Federally Reported Highest Grade Completed (TAPR): [Dropdown]
- Highest school grade completed: 12th Grade C [Text]
- \*US-Based Schooling:
  - High school diploma or equivalent received:  Yes  No
  - Highest education level completed: Completed o [Text]
  - Verify: [Verify | Scan]  Other Appli
- \*US-Based Schooling:
  - State's compulsory age: 15 [Text]
  - By-Pass Age Eligibility: [Text]
  - Verify: [Verify | Scan]

The bottom tab is titled "Education Partner Services" and contains the following fields:

- Verify: [Verify | Scan | Upload | Link]
- The School Status prompt below may be system-set or selections may be limited based on responses to questions above.
- School Status: Not attending school; secondary school graduate or has a recognized equivalent [Dropdown]
- Verify: [Verify | Scan | Upload | Link]  Applicant Statement
- Student ID: [Text]
- Receiving services from Adult Education (WIOA Title II):  Yes  No  Did not self-identify
- Receiving services from YouthBuild:  Yes  No  Did not self-identify
- YouthBuild Grant Number: [Text] Format: AA-99999-99-99-A-99
- Receiving services from Job Corps:  Yes  No  Did not self-identify
- Receiving services from Vocational Education (Carl Perkins):  Yes  No  Did not self-identify
- Receiving services from Vocational Rehabilitation: [Text]
- Individualized Education Program Participant: Not Applicable [Dropdown]

#### WIOA Application – Educational Information Tab

► **To complete the Education Information tab:**

- 1 Select the highest secondary school grade completed, and indicate if a diploma or equivalent was received.
- 2 Select current highest school grade completed.

- 3 Select and verify the federally reported Highest Education Level Completed.
- 4 Select and verify the current School Status.

Enter Educational Partner Services (if applicable):

- 5 Identify if the individual is receiving services from:
  - Adult Education
  - Youth Build (if so, include Grant Number)
  - Job Corps
  - Vocation Education
- 6 Identify if the individual is, or was, an Individualized Education Program (IEP) participant.
- 7 When finished, click **Next** to save your edits and proceed to the Public Assistance tab or click [Exit Wizard](#) to save a partial application.

**Notes:** *Applications for a “Youth” eligibility will have a Youth Eligibility Education Information section above the other two. It identifies education leading to GED or High School equivalency, last secondary school attended, and whether the individual is of compulsory school age and not attending school during the recent quarter.*

*A WIASRD Data area may also display at the bottom of the page if data was recorded in a WIA application (prior to WIOA) on the highest school grade completed and enrollment in education leading to a GED/HSE.*

#### **Public Assistance Tab**

On the Public Assistance tab, answer each of the statements about assistance that the individual receives. For an Adult application, the Public Assistance fields listed are mainly Yes/No fields for each type of assistance, and require an indication of validation if the response is Yes.

- Blue text above assistance questions helps clarify time periods for each assistance question asked.

### Public Assistance Information

**Individual or member of a family that is receiving, or in the past 6 months has received, the following:**

\* Temporary Assistance for Needy Families (TANF) recipient:  Yes  No

TANF Recipient Type:  Applicant  Family Member  Not Applicable/Unknown

Verify:

\* Supplemental Security Income (SSI) recipient:

SSI Recipient Type:  Applicant  Family Member  Not Applicable/Unknown

Verify: [ Verify | Scan | Upload | Link ]

Individual receives, or in the last 6 months, received:

Social Security Disability Insurance (SSDI) recipient:  Yes  No

Verify: [ Verify | Scan | Upload | Link ]

Individual currently meets the following:

\* Youth Currently living in high-poverty area:  Yes  No  Not Provided

Verify: [ Verify | Scan | Upload | Link ]

\* Foster Child (State or local payments are made for applicant):  Yes  No

Verify: [ Verify | Scan | Upload | Link ]

\* Youth currently receives, eligible to receive, free or lunch under the Richard B. National School Lunch Act:  Yes  No  Not Provided

Verify: [ Verify | Scan | Upload | Link ]

\* Receiving Services under SNAP Employment and Training Program:  Yes  No  Unknown

\* Receiving, or has been notified will receive, Pell Grant:  Yes  No

\* Ticket-to-Work Holder issued by Social Security Administration:  Yes  No  Unknown

WIOA Application – Public Assistance Tab

► **To complete the tab:**

- 1 Indicate Yes for each of the assistance options that apply, and verify the assistance accordingly.
- 2 Click **Next** to save your edits and proceed to the Barriers tab or click Exit Wizard to save a partial application.

**Note:** Applications for “Youth” eligibility will have additional questions and may ask if assistance is for the applicant or a family member.

## The Barriers Tab

The Barriers tab for the WIOA application is similar to the Barriers tab for WIA; however, the data fields have been organized into two areas: Individual Barriers and Barriers to Employment:

The Individual Barriers section includes the individual's abilities and history barriers (e.g., English language learner, High School Drop Out, Basic Skills Deficient, plus Homeless and Offender retained).

### ► To complete the tab:

- 1 Select any individual barriers that apply.
- 2 Use the Verify link to identify the document, record, scores, etc., used to verify the barrier.

### Individual Barriers

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

\* English Language Learner:  Yes  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

High School drop out (WIOA Definition): No

Not Attending School; Within age of compulsory school attendance: No

\* Basic Skills Deficient/Low Levels of Literacy:  Yes  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]  
[Add/View Basic Skills Scores](#)

\* Homeless:  Yes  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

\* Runaway:  Yes  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

\* Foster Care Status:  Yes, Currently In  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

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\* Out-Of-Home-Placement:  Yes  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

\* Eligible under Section 477 of the Social Security Act:  Yes  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

\* Ex-Offender (Individual has been arrested/convicted of a crime):  Yes  No  Did not self-identify  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

\* Incarcerated at Program Entry:  Yes  No  Not Provided

\* Pregnant/Parenting Youth:  Yes  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

\* Youth Requires Additional Assistance to complete an educational program or to secure/hold employment:  Yes  No  
 Verify: [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

WIOA Application – Barriers Tab

**Note:** Most Individual Barriers require a verification (such as documents, records, or test scores). A basic skills deficiency may include Basic Skills Assessments which can be

*recorded, using the same assessment controls that are also used for skills assessments in initial program assessment (e.g., Wagner-Peyser).*

Add/View Basic skills scores: [Click Here](#)

[Add/View Basic Skills Scores Link](#)

*Some items that were configured fields for specific customers/sites (e.g., Gang Status, Parolee Number, Substance Abuse) have been moved to a Barriers section on the Miscellaneous tab, which contains all configurable data elements.*

*The barriers displayed under Individual Barriers are more extensive when staff are applying for the Youth eligibility type.*

The Barriers to Employment section includes barriers for displaced homemaker, cultural barriers, and farmworker identification. Some barrier selections may be predetermined from previous responses or registration information.

- 3** Select any employment barriers that apply.
- 4** Use the Verify link if it applies (e.g., if you select Yes for Displaced Homemaker status).

### Barriers To Employment

**Disabled:** No

**\* Displaced Homemaker:**  Yes  No

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

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

**\* Within 2 years of exhausting TANF lifetime eligibility:**  Yes  No  Not Provided

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

**Older Individual:** No

**\* Hawaiian Native:**  Yes  No  Not Provided

**American Indian/Alaskan Native:** No

**\* Single Parent (including single pregnant women):**  Yes  No  Did not self-identify

**\* Cultural Barriers:**  Yes  No  Did not self-identify

**\* Is the individual participating in the National Farmworker Jobs Program (WIOA Sec. 167)?**  Yes  No

**\* Meets Governor's special barriers to employment:**  Yes  No  Not Provided

*WIOA Application – Barriers Tab - Employment Barriers Section*

- 5 Click **Next** to save your edits and proceed to the Family Income Worksheet tab or Household and Income tab, depending on your site's configuration.

Depending on your site's configuration, the Family Income Worksheet will be displayed as a tab between the Barriers and Household and Income tabs. The data entered in the worksheet will create a total which will carry over to the Annualized Family Income field on the Household and Income tab.

Family Income Worksheet							
<i>Low income has already been established based upon previous entries. Family size and income are optional.</i>							
Total Annual Income:		0.00					
Income Worksheet	1	2	3	4	5	6	Total
Wages:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Self-Employed Wages:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pension:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Insurance Annuity:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alimony:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
UI Benefits:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6 Month Income: 0.00 X 2 12 Month Income: 0.00							

*Family Income Worksheet*

### Household and Income Tab

The Household and Income tab for the WIOA application may help identify or establish a Low Income for the individual if it has not already been established.

Note the following:

- The tab will indicate, in red text, whether family size and income information are optional in determining Low Income Status (i.e., if Low Income is already established).
- Other items (e.g., data from Public Assistance or Barriers) may establish that Low Income is met so that entering data on this screen may not be required, and it will only contain a statement confirming the status met.

► **To complete the tab:**

- 1 Select if the individual **qualifies as a Family of 1**.
- 2 Select the **Family Size** and specify the verification documentation using the Verify link.
- 3 Enter the **Annualized Family Income**.

**Note:** *You can click the link at the bottom of the screen to see a table for low income.*

### Income Information



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

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

• Family Size:

• Verify: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)  
 Most recent tax return supported by IRS documents(e.g.form letter 1722)

• Annualized Family Income (last 6 months X2):

• Verify: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)  
 Pay stubs

Income Table

**Income Level Guidelines**  
Effective Date: 5/29/2019

Family Unit Size	METRO	NON-METRO
1	\$12,490	\$12,490
2	\$16,910	\$16,910
3	\$21,691	\$21,330
4	\$26,779	\$26,086
5	\$31,606	\$30,784
6	\$36,964	\$36,001
7	\$42,322	\$41,218
8	\$47,680	\$46,435
For each additional person in a family above eight, add	\$5,358 per person	\$5,217 per person

*WIOA Application – Household and Income Tab*

- 4 Click **Next** to save your edits and proceed to the Federal Initiates tab or the Miscellaneous tab, depending on your site's configuration.

The Federal Initiates tab for WIOA Adult Application collects information specific to Disability Employment Initiative (DEI).

► **To complete the DEI tab:**

- 1 Select the Perceived Barrier To Employment.
- 2 Select the applicable responses for SSI or SSDI and Current or Previous Employed.
- 3 Enter Employment information if applicable.
- 4 Click **Next** to save your edits and proceed to the Miscellaneous tab.

The Miscellaneous tab for the WIOA Application handles custom fields, each of which can be configured for a specific customer's site. The possible data on this tab is organized into three areas: Adult Priority, Barriers, and Employment.

► **To complete the Miscellaneous tab:**

- 1 Select Yes or No in the appropriate fields.
- 2 Enter data in the remaining fields as necessary.

### Adult Priority

• Meets the Additional Priorities Established by the Governor and/or Local Board:  Yes  No  Not Provided

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

### Miscellaneous Barriers

• Job Ready Connections Referral:  Yes  No

• Ex-Offender - individual has been arrested/convicted of a crime: No

• Offender Felon: No

• Offender Misdemeanor: No

• Gang Status:

• Youth of Incarcerated Parent:  Yes  No

• Substance Abuse:  Yes  No

• Poor Work History:  Yes  No

• Lacks Transportation:  Yes  No

• Lacks Child Care:  Yes  No

• Without Health Care Benefits:  Yes  No

• Victim of Domestic Abuse:  Yes  No

WorkKeys Scores [WorkKeys Score.](#)

### Miscellaneous Employment

TAA Petition Number:

• Intent to live and work in the State of Florida Requirement Met:  Yes  No

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

*WIOA Application – Miscellaneous Tab*

- 3 Click **Next** to save your edits and proceed to the Eligibility Summary.

### Eligibility Summary Tab

The Eligibility Summary tab for WIOA includes Applicant Eligibility and Grants Eligibility. This combined Eligibility & Grants tab includes four sections:

- **Applicant Eligibility** – displays an eligibility matrix summarizing which customer program groups (eligibility-types) the individual is eligible for, as well as priority of service conditions, and any reasons for not being eligible.

**Tip** *If the row is green (eligibility = Yes), and if no grants are applicable, you can skip to Staff Eligibility Information (bottom of the page), and click **Next** or **Finish**.*

- **WIOA Grant Eligibility** – displays state and national WIOA grant eligibility, which controls access to Grant funding streams in the Activity/Enrollment record.

- **Grants** – lists specific state or local grants that can be associated with the individual. For example, if grant types are clicked Yes in WIOA Grant Eligibility, staff can review and select specific grants from a table, which controls access to the grant funding streams in activity/enrollment records. This section also contains Applicant Eligibility.

**Meets Low Income**

The top of the Application Eligibility area has a display-only indication of whether the applicant meets the definition for low income. This will indicate Yes if Low Income was already established (based on previously verified low income related to responses entered on the Public Assistance tab, or on the Family Income tab), otherwise it will indicate No. Staff can also click a link to see a table for current low income guidelines, the same as the one on the Family Income tab.

**Applicant Eligibility** i

Applicant meets the definition for low income: Yes

Income Table: [Income Table](#)

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

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

*WIOA Application Eligibility Summary Tab – Eligibility Determination Section*

**Eligibility Matrix**

The Eligibility Matrix is a table which has a row for each customer program group (i.e., each eligibility type) that staff may have identified for application on the first Intro tab.

- The Program and Eligible columns indicates whether the applicant is *eligible* for services via that program type.
- The Priority column indicates any priority-of-service statuses that apply to the individual. Staff must consider these, along with the eligibility status (e.g., Veteran, Basic Skills Deficient, and Low Income). Priority is important for staff because WIOA does not mandate a level of business rules to enforce Priority of Service in Enrollments.
- The Calculated Exceptions/Limitation column is for youth and will be blank for adults.
- The Reasons(s) Not Eligible column will indicate identifiable reasons why eligibility is *No* or *Undetermined* in the Eligible column. For example:
  - If the eligibility type and date were not selected for Program Type on the Intro tab, this column will indicate *No Eligibility Date*.

- The Action column will include a checkbox for staff to *Inactivate* an individual who is eligible (i.e., in green). Checking this box will discontinue the ability to enroll them in activities/services associated with that customer program group, but will not change their application status.

### WIOA Grant Eligibility

For possible WIOA grant eligibilities (based on the eligible program type), the buttons and checkboxes are active and optional. When they are defaulted to *Not Applicable* — staff can select *Yes*.

Grants are special programs with unique eligibility requirements.

#### WIOA Grant Eligibility i

Changes in this section will create immediate updates to the record.

**Incumbent Worker Eligibility:**     Yes    No    Not Applicable     Inactive

Applicant does not meet the requirements for Incumbent Worker eligibility.

**National Dislocated Worker Grant NDWG:**     Yes    No    Not Applicable

Applicant does not meet the requirements for NDWG eligibility.

**Statewide Adult Eligibility:**     Yes    No    Not Applicable     Inactive

**Statewide Dislocated Worker Eligibility:**     Yes    No    Not Applicable     Inactive

Applicant does not meet the requirements for Statewide Dislocated Worker eligibility.

**Statewide Youth Eligibility:**     Yes    No    Not Applicable     Inactive

Applicant does not meet the requirements for Statewide Youth eligibility.

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

Applicant does not meet the requirements for Statewide Rapid Response Additional Assistance eligibility.

#### WIOA Grant Eligibility Section

When staff selects *Yes*, and then adds a grant to the application record (using the table indicated in the following Grants area), it indicates staff have reviewed the eligibility requirements for the grant that are typically beyond formula eligibility requirements – typically requirements are specific barriers or characteristics based upon the Grant requirements.

- **Not Applicable** – is the default value when the tab/screen loads, and indicates staff have done nothing to evaluate the applicant for eligibility.
- **No** – means a staff user has set the value to *No*, and grants for the particular grant type (funding) are not available to add to the application, which keeps enrollments from being created for those grants.

- **Yes** – a staff user has set the value to Yes because they have determined specific grants may apply for this type. This enables the ability to [View Available Grants](#) (a link in the Grants section of the tab).
- The Inactive checkbox can be selected (or deselected) during the course of the application until the creation of the Outcome record. This selection controls access to funding streams in the Activity/Enrollment record(s).

### Eligible Grants

For Adult eligibility, the active grant selections include:

- **Statewide Incumbent Worker Eligibility** - Staff must have access to the Adult Basic Career Services Eligibility group or Adult Eligibility group. This field can be modified only when Adult Basic Career Services Eligibility or Adult Eligibility is set to Yes.
- **National Dislocated Worker Grant NDWG** (formerly NEG) - Staff must have access to the Adult or Dislocated Worker Eligibility group. This field can be modified when Adult Eligibility or Dislocated Worker Eligibility is set to Yes.
- **Statewide Adult Eligibility** - Staff must have access to the Adult Basic Career Services Eligibility group or Adult Eligibility group. This field can be modified only when Adult Basic Career Services Eligibility or Adult Eligibility is set to Yes. This field is disabled when Adult Basic Career Services Eligibility and Adult Eligibility are set to No or are null. The system will display a message when this field is disabled: "Applicant does not meet the requirements for Statewide Incumbent Worker eligibility."

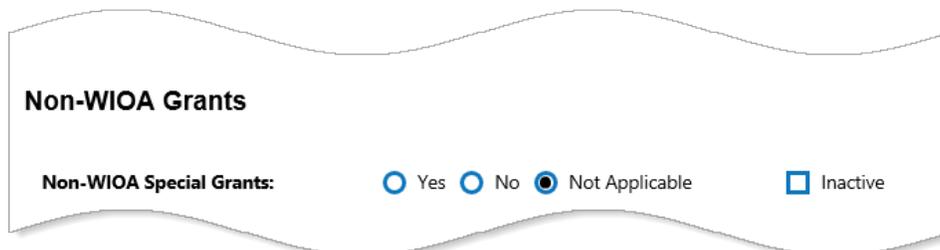
### Non-Eligible Grants

For Adult eligibility, the disabled selections include:

- **Statewide Dislocated Worker Eligibility** - Staff must have access to Dislocated Worker Eligibility.
- **Statewide Youth Eligibility** - Staff must have access to Youth Eligibility.
- **Statewide Rapid Response Additional Assistance Eligibility** - Staff must have access to Dislocated Worker Eligibility.

### Non-WIOA Grant Eligibility

The possible Non-WIOA Grant eligibility entries that apply are not based on eligible program type. This section's specific grants display when the switch for either **Non-WIOA Special Grants** or **Local Funded Grants** is turned on. When turned on, the entries display as described below:



**Non-WIOA Grants**

Non-WIOA Special Grants:  Yes  No  Not Applicable  Inactive

#### Non-WIOA Grants Section

**Non-WIOA Special Grants** - When the switch for **Non-WIOA Special Grants** is turned on, this field can be edited at any time, until an exit record exists for the application.

- Checkbox for **Non-WIOA Special Grants Inactive** - This checkbox can be selected or deselected during the course of the application, until the creation of the Exit record. This selection controls access to funding streams in the Activity/Enrollment record(s).

**Local Funded Grants** - When the switch for **Local Funded Grants** is turned on, this field can be edited at any time, until an exit record exists for the application.

- Checkbox for **Local Funded Grants Inactive** - This checkbox can be selected or deselected during the course of the application, until the creation of the Exit record. This selection controls access to funding streams in the Activity/Enrollment record(s), based on grant funding availability.

**Grants**

Once types of grants are selected in the two sections above, staff can click the [View Available Grants](#) link to see all of the possible grants. This will display a table of grants.

Clicking the **Yes** radio buttons in the above sections activates the [View Available Grants](#) link, which staff can then click to activate/display a table of Grant types/IDs.

Grants <span style="float: right;">i</span>					
Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Incumbent Worker	478	WIOA-Incumbent Worker-20% Non-Waiver Local Only	478	01/03/2020	<a href="#">Remove</a>
Incumbent Worker	782	IWT 15% Governor's Reserve	Not Defined	01/03/2020	<a href="#">Remove</a>
NonWIOA Special Grant	481	TechHire	481	01/03/2020	<a href="#">Remove</a>

*Grants List Page*

The table displays all grants, active or inactive, for which the individual has been determined to be eligible.

**Note:** *The system will indicate when there are no grants associated to the application by displaying a "no records found" message.*

Select from the list of available grants.

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Statewide Adult	594	Evacuee Assistance - Adult	594		<a href="#">Add</a>
Statewide Adult	658	LWDB 14 –Apprenticeship Expansion 2019 – Workforce Apprenticeship	NA		<a href="#">Add</a>
Statewide Adult	722	LWDB 14 Soft Skills Development 2019 – Partners for Career Pathways	NA		<a href="#">Add</a>

*The Grants sections lets staff display available grants and add specific Grant IDs*

Staff can then click the [Add](#) link to add the specific Grant Types for the individual.

The columns in the Grant table include:

- **ETA/Local Grant Code** - The system will display either the *Local Grant Code* or *ETA Grant Code*, depending on the record. If neither exists, the system displays "Not Defined."
- **Date Added** - The date the grant record was added to the application.

**Note:** *WIA-converted grants will not have an accurate date of entry.*

From the **Action** column, the **Delete** link is not enabled until an enrollment record has an **Actual Begin Date** associated to the grant. When clicked, the system will prompt staff to confirm the selection before deleting.

Case Manager: The Case Manager area displays current case assignment and allows you to assign a new case manager (depending on your privileges).

<b>Current Case Manager:</b>	<b>Group:</b> WIA Archive Gulf to Bay 998 <b>Case Manager:</b> SAFARIK, MARSHA <b>Temporary Case Manager:</b> Not Applicable <a href="#">Assign Case Manager</a>  <a href="#">Assign Me</a> <a href="#">Remove Case Manager Assignment</a>
<b>Previous Case Manager:</b>	<input type="text"/>

#### *Case Manager Section*

**Current Case Manager** – This displays the case assignment data, including:

- **Group:** *Case Assignment Group Name* of the Case Manager, if applicable.
- **Case Manager:** The assigned manager's last and first name.
- **Temporary Case Manager Name.** Only displays a name if applicable.

Assignment can be made/modified by the links:

- [Assign Case Manager](#) - Clicking this link allows staff to assign a case manager to this application (create/edit).
- [Assign Me](#) - Clicking this link allows staff to assign this application to his/her own case load.
- [Remove Case Manager Assignment](#) - Clicking this link allows staff to remove the Case Manager assigned to this application.

**Note:** *Depending on your site's configuration, the system may require case assignment to finish an application, or it may auto-assign a manager (based on defined management groups). For such configurations, you may see a message at the top of the tab when you click the Next or Finish button, and an assignment is not made.*

- You must assign as Case Manager to this application.
- The system cannot automatically assign this Case. The Staff user is not assigned to a compatible group.

### Individual Signature

This section allows you to Create PDF, include Staff Signature, and add Applicant Signature.

- Select the desired check boxes.
- Clicking on the [Applicant Signature Link](#) will launch the signature window, from this window, selected either ePad or Topaz depending on your system's configuration and collect the applicant's signature.

**Individual Signature**

Create PDF

Include Staff Signature

[Applicant Signature](#)

---

[Exit Wizard](#)

<< Back

Finish

Print

*Individual Signature section*

### Finishing the Application

You can click **Finish** or **Next** at the bottom of the screen:

- **Finish** will complete and close the application and return staff to the Programs tab. The Application will display as *Complete* for the Adult eligibility type.
- **Next** will complete and close the application and open the first tab for creating an enrollment in WIOA.

**Notes:** *The Finish button will not create the Participation. When you return to the Programs tab to enroll the individual in services, you must create a participation record. Next automatically generates the participation record, before it opens Enrollment tabs.*

*See the topic “WIOA Service/Activity Enrollments” for more on the steps for enrollment after completion of an application.*

### WIOA Application for a Dislocated Worker

To be eligible as a Dislocated Worker, the individual must:

- Be 18 years of age or older
- Be a citizen or non-citizen authorized to work in the U.S.
- Meet Selective Service registration requirements (males only)
- Meet criteria for Dislocated Worker

Requirements are the same as for Adults, plus that the individual:

- Has been terminated or laid off, or received notice of termination or layoff
- Is eligible for or has exhausted unemployment
- Has been employed long enough to demonstrate attachment to workforce, but is not eligible for UI due to insufficient earnings or having performed services not covered under state UI laws
- Is unlikely to return to a previous industry / occupation (permanent layoff with no recall)

For meeting these criteria, staff will see an additional Dislocated Workers section on the Employment tab, including questions for six categories (that can qualify the individual as dislocated) along with other Layoff and Dislocation Event fields.

**Tip** *The following subtopics indicate the minimal information required for each tab for Dislocated Worker eligibility. For more details on any of the fields on these tabs (other than the Employment tab), see the topic “WIOA Application for an Adult”.*

#### ► To create a Dislocated Worker Application:

- 1 Under the WIOA bar on the Programs tab, click the [Create Title I - Workforce Development \(WIOA\) Application](#) link. The Intro tab displays.

- 2 Enter and/or review each area that applies.

**Note:** The last field, WIA Converted Application ID, only shows an ID for converted records. These also have a “WIA Legacy Data” link on the last Eligibility & Grants tab. See the topic “Seeing WIA Legacy Data on the Eligibility Tab” for more information.

- 3 Review the fields. You can see other programs that may also fund needed activities or services. The area does not display if other programs do not exist.

**Note:** For individuals younger than 18, the Adult and Dislocated Worker eligibility selection boxes are disabled.

- 4 Enter the **Application Date**.
- 5 Select the **Adult Eligibility** type.
- 6 Enter the **Adult Eligibility Date**. The Eligibility Date for the selected eligibility type (i.e., Dislocated Worker) cannot precede the Application Date, nor can it be later than today’s date
- 7 Select the correct **Local Area, Office of Responsibility**, and standard **Office Location**.
- 8 Click **Next** to save your edits and proceed to the Contact Information tab.

### Contact Information Tab

The Contact tab includes four areas: Contact Information, Current Address, Mailing Address, and Alternate Contacts. Many of the fields are prefilled from registration.

Contact Information Tab for Dislocated Worker

► **To complete this tab:**

- 1 Ensure that all required fields are entered.
- 2 Verify the SSN and identify verification document using the [Verify](#) link.

**Note:** *The Edit SSN link is available only to staff with proper privileges.*

- 3 Verify the Current Address and identify verification document using the [Verify](#) link.

**Note:** *The address used will display in a separate Address at Date of Application area if you return to the Contact tab after you save the initial data. That area is disabled when you return to this tab. Staff with the proper privileges can click a link to change this Address at Date of Application.*

- 4 Make any additions or changes to Alternate Contacts, using the [Manage Alternate Contacts](#) link.
- 5 Click **Next** to save your edits and continue to the next part of the enrollment application.

**Note:** *Depending on your system configuration, you may be required to click the [Manage Alternate Contacts](#) link and supply an alternate contact before the next step. You can also click the checkbox (at the bottom of the screen) that allows you to save a partially completed program enrollment.*

### Demographics Tab

The Demographics tab includes contains several fields for demographic information. Some of the available options on this application are dependent upon your system's configuration.

General items to note:

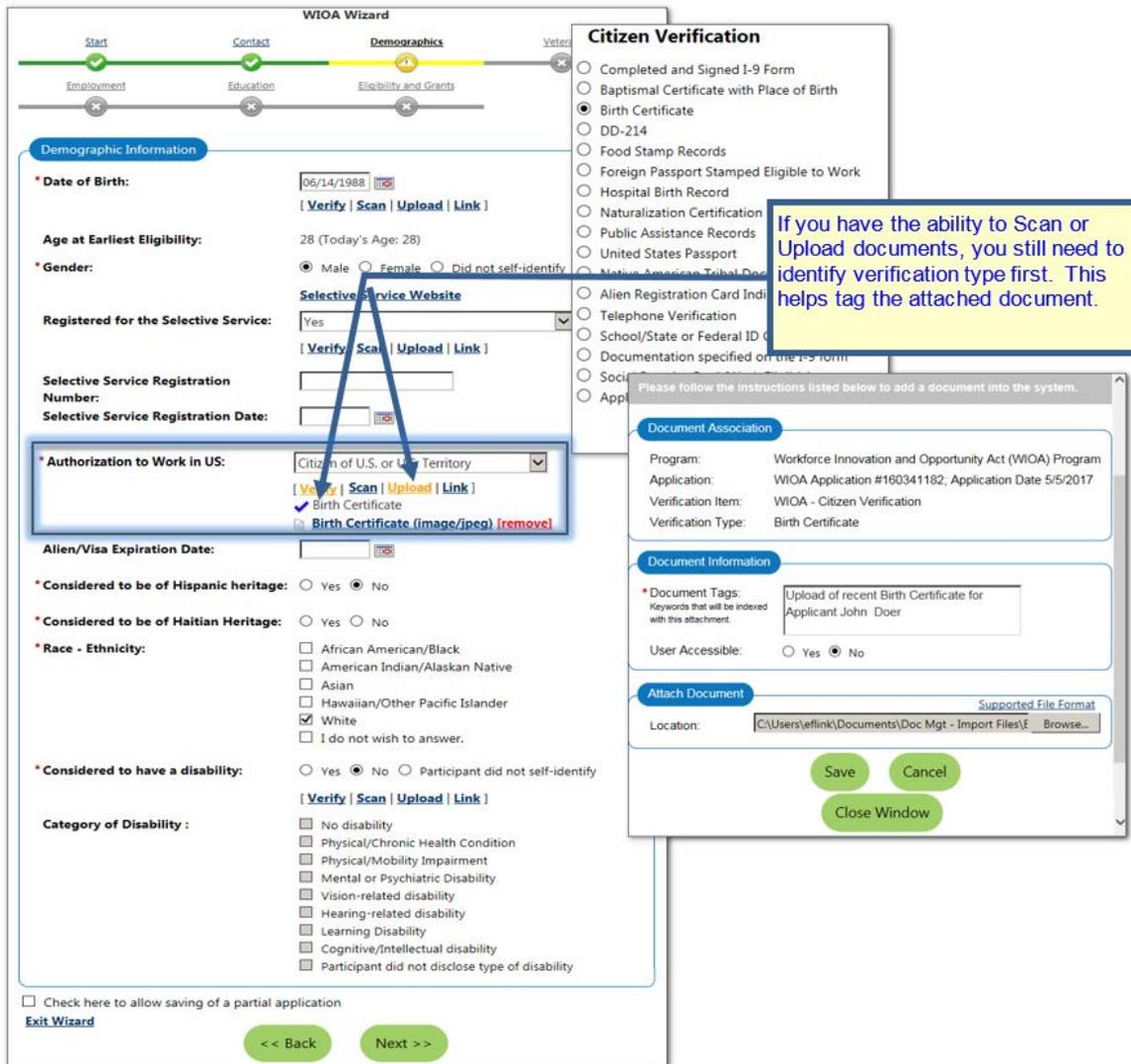
- If any custom Demographic fields were created for a specific customer site (e.g., USCIS - Alien Registration number), they will display if the configuration switch is turned on.
- The question, "Considered to be of Haitian Heritage?" is an additional required field in WIOA.
- Many verification lists, such as the Citizenship Verification list connected to Authorization to Work in U.S., may have different items in the list, depending on your site's configuration.

► **To complete the tab:**

- 1 Minimally enter and/or verify:
  - Date of birth
  - Gender
  - Selective Service registration status, if applicable
  - Citizenship or Authorization to work in the U.S.
  - Heritage and ethnicity questions
  - Disability (if they consider themselves to have one)

**Note:** *Selective Service registration and citizenship can play a key role in determining WIOA eligibility later in WIOA enrollment. If no customer program groups can be selected, confirm these items have been completed and verified, if applicable.*

- 2 Click **Next** to save your edits and proceed.



WIOA Application - Demographics Tab

With the *Document Management* module, you can upload documents (as shown in the figure above), or if you have a scanner set up, you can scan the verification documents. For details about acquiring document images, refer to *Chapter 30 - Manage Documents* and the topic, *In-Context Scanning, Linking, and Viewing*.

**Veteran Tab**

If the individual is a transitioning service member or existing veteran, complete and verify information in each area that applies.

**Transitioning Service Member (TSM)**

If the individual is a TSM:

- Select Yes.
- Then select TSM type and enter Estimated Discharge Date.

WIOA Veteran Tab

## Veteran Information

If the individual is an eligible veteran:

- Select the type of Eligible Veteran Status.
- Verify the Eligible Veteran Status (with an appropriate type of documentation).

**Note:** You can click [Obtain DD-214](#) to access the federal veterans' service records site. From a [Campaign/Expedition](#) link to the Office of Personnel Management site, you can use their list of campaigns and expeditions that qualify for veterans' preference.

- If the veteran served more than one tour of duty, select Yes. (Yes will display dates for up to three separate date ranges.)
- Enter dates for the tour(s) of duty.
- Select the *disabled* type if the individual is a *Disabled* or *Special Disabled* veteran.
- If the veteran is homeless, click Yes.
- If they received services from Veterans Vocational Rehabilitation, click Yes.

**Note:** If the application is one that was started before WIOA, you may also see the following questions. This will normally be for closed applications or applications opened before July

2015 (and now having an eligibility type added, e.g., an old Adult eligibility that now is having Dislocated Worker eligibility added).

- Indicate if a Campaign Veteran.
  - Indicate if separated with the last 48 months.
  - Indicate if the individual attended a Transition Assistance Program (TAP) within the last 3 years.
- Click **Next** to save your edits and proceed or click [Exit Wizard](#) to save a partial application.

### Employment Tab

Use the Employment Information section to help define the individual's employment status, employment history, and any related layoff/dislocation events that may help determine dislocated worker eligibility.

The data is organized into three sections: Employment Information, Employment History, and Dislocated Worker. The last section only displays when Dislocated Worker eligibility was selected on the Intro tab.

When you are completing the application for the Dislocated Worker eligibility type, all sections will display.

Many items displayed are *conditionally* not required. However, for Dislocated Worker eligibility, you should enter all data that applies.

At a minimum, under Employment Information:

- Select and verify employment status.
- Identify if underemployed (if individual is employed).
- Identify if in a registered Apprenticeship Program.
- Identify if receiving unemployment.
- Select Unemployment Eligibility Status.  
If a *Claimant*, select:
  - UI Referred By Status
  - Claimant has been exempted from work search (Yes, No, or Unknown)
  - Date claimant was exempted (if Yes to previous)

**Note:** *The three controls above will not show for older applications with an eligibility date that is previous to WIOA and PIRL data. Old applications will display a Farmworker Status (WIASRD) field.*

- Verify Unemployment Compensation (if a Claimant)
- Indicate Longer Term Unemployed (if applicable).
- Indicate the most recent hourly rate of pay (current or last job).
- Use the [Search O\\*Net](#) link to identify the occupation code for most recent employment.

Under Employment History:

- Identify/enter the most recent or current employer for the dislocated employment (if not already entered and displayed in table).

**WIOA Wizard**

Start Contact Demographics Veterans Employment  
Education Public Assistance Barriers Family Income Eligibility and Grants

**Employment Information**

**\* Employment Status:**  
Employed, but received notice of termination of employment or military separation  
[ Verify | Scan | Upload | Link ]  
✓ UI Records/Check Stubs

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

**In a Registered Apprenticeship Program:**  
 Yes  No  Did not disclose

**\* Unemployment Eligibility Status:**  
Claimant

**UI Referred By Status:**  
WPRS

**Claimant has been exempted from work search:**  
 Yes  No  Unknown

**Date claimant was exempted from work search:**  
Today

**Unemployment Compensation Verify**  
[ Verify | Scan | Upload | Link ]  
✓ UCTC and JT12

**Long-term Unemployed (27 or more consecutive weeks):**  
 Yes  No

**Please enter the Wage and Onet Code for all applicants with current/previous employ Current or Most Recent Hourly Rate of Pay:**  
\$ 18.65

**Search Onet**

**Occupation of Most Recent Employment Prior to WIA/WIOA participation (if available):**

**Employment History**

Company Name	Location	Job Title (Occupation)
Geographic Solutions Inc	2570 Coral Landings Palm Harbor, FL	Regional Representative (Marketing)

[ Add Employment History ]

**Dislocated Worker**

**Employment Status at Dislocated Worker Eligibility:**  
Employed, but received notice of termination of employment or military separation

**Under-Employed at Dislocated Worker Eligibility:**  
 Yes  No  Not Applicable

**Dislocated Worker Category:**

**Category 1:** Terminated or laid off, or has received notice of termination or layoff, and is eligible for or has exhausted entitlements to UC, and is unlikely to return to previous industry or occupation.

**Category 2:** Terminated or laid off, or has received notice of termination or layoff, and has been employed for sufficient duration (based on state policy) to demonstrate workforce attachment, but is not eligible for UC due to insufficient earnings, or the employer is not covered under the state UC law, and is unlikely to return to previous industry or occupation.

**Category 3:** Individual is terminated or laid off, or has received notice of termination or layoff, from employment as a result of the **Permanent closure of or substantial layoff** at a plant, facility or enterprise.

**Category 4:** Individual is **employed** at a facility at which the employer has made a **general announcement that the facility will close**. Enter the date the facility will close (if known) in the Projected Layoff Date below.

**Category 5:** Individual was **previously self-employed** (including farmers, ranchers and fishermen), but is **unemployed** due to general **economic conditions** in the community of residence or because of **natural disaster**. Record the last date of self-employment in the Actual Layoff Date.

**Category 6: Displaced Homemaker:** An individual who has been providing **unpaid services to family members** in the home and has been dependent on the income of another family member but is **no longer supported by that income**; or is the **dependent spouse** of a member of the Armed Forces on active duty and whose **family income is significantly reduced** because of a deployment, or a call or order to active duty, or a permanent change of station, or the service-connected death or disability of the member; and is **unemployed or underemployed** and is experiencing difficulty in obtaining or upgrading employment.

**Category 7: The spouse of a member of the Armed Forces** on active duty, and who has experienced a **loss of employment as a direct result of relocation to accommodate a permanent change in duty station** of such member.

**Category 8: The spouse of a member of the Armed Forces** on active duty and who is **unemployed or underemployed** and is experiencing difficulty in obtaining or upgrading employment.

**Category 12: Dislocated Worker Grant (DWG) eligibility:** Individual does not meet criteria outlined for Dislocated Workers in categories 1 - 8 above, but is an individual that meets **DWG** eligibility outlined under WIOA Title ID National programs, Sec. 170 National dislocated worker grants, relating to Sec 170(b)(1)(A) workers affected by major economic dislocations OR Sec 170(b)(1)(B) workers affected by an emergency or major disaster.

**None of the above.** Individual does not meet the definition of Dislocated Worker.

[ Verify | Scan | Upload | Link ]  
✓ Cat 1 or 2: UC Records

**In WIOA, Dislocated Worker Categories include two options for Spouse of Armed Forces, and one for DWG Grant eligibility. A Verify must be performed for any category (at the bottom of the categories)**

*This additional "Dislocated Worker" area only displays for Dislocated Worker eligibility*

*Employment Tab including Dislocated Worker Categories*

Under Dislocated Worker:

- Identify the correct category (select from category 1 to 8 (or 12)).
- Verify the layoff reason.
- If you identified a termination/layoff status, fill in all relevant data for the Layoff and Dislocation Event fields that apply in the bottom portion of the screens (shown on the next page).

**The “Dislocated Worker” area also includes fields for any layoff and layoff-related dislocation events**

**Category 12: Dislocated Worker Grant (DWG) eligible**

Workers in categories 1 - 8 above, but is an individual that meets DWG eligibility criteria and is eligible for national programs, Sec. 170 National dislocated worker grants, relating to Sec 170(b)(1)(A) workers affected by major economic dislocations OR Sec 170(b)(1)(B) workers affected by an emergency or major disaster.

None of the above. Individual does not meet the definition of Dislocated Worker.

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

Cat 1 or 2: UC Records

**Projected Layoff Date:**  Today

**Actual Layoff Date (if date is in the future, please leave empty):**  Today

**Entry of a Projected or Actual Layoff Date fields may be required**

**Attended a Group Orientation (Rapid Response):**  Yes  No

**Most Recent Date Attended Rapid Response Service:**  Today

[Find Rapid Response Event](#)

**Rapid Response Event Number:**

[Search Individual Employment History](#)

**Dislocation Employer:**

**Employer Address 1:**

**Employer Address 2:**

**Employer City:**

**Employer State:**

**Employer Zip:**

**Dislocation Hourly Wage:**

Check here to allow saving of a partial application

[Exit Wizard](#)

*Employment Tab for Dislocated Worker - Layoff and Dislocation Event Fields*

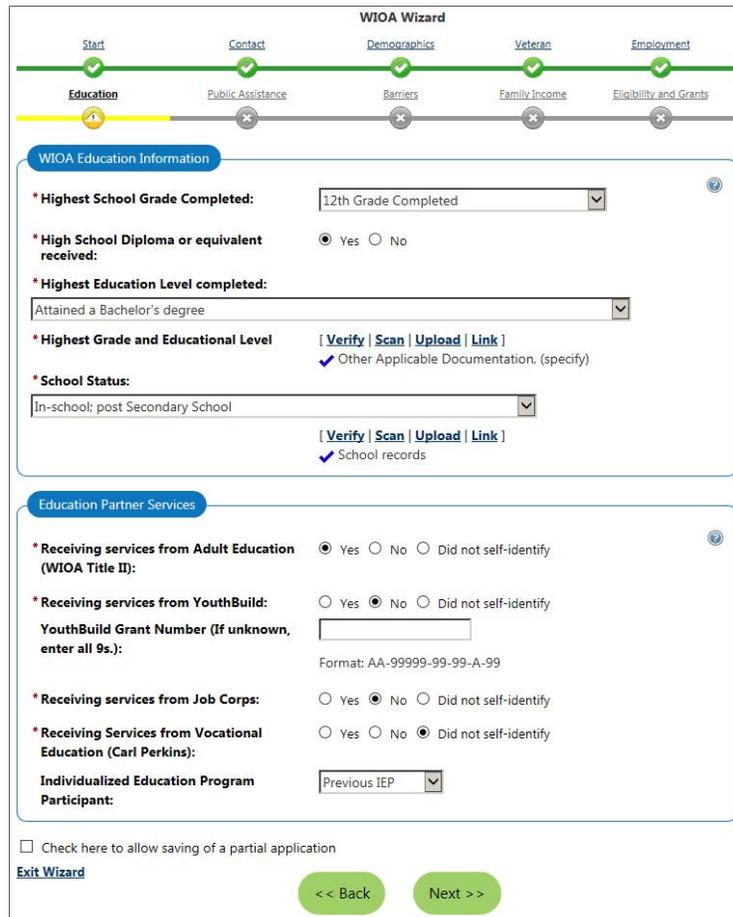
- Click **Next** to save your edits and proceed or click [Exit Wizard](#) to save a partial application.

**Note:** *The fields at the bottom of the screen have requirements depending on the category selected. If you do not fill in required fields when you click Next, messages will display in red to indicate any required entries. For example, if you select category 1 but do not enter any data below the category, all the fields below will display:*

- The Current Rate of Pay must be greater than \$0.00.
- Dislocation Reason requires you to provide either a Projected Layoff Date or an Actual Layoff Date.
- Dislocation Employer is required.
- Dislocation Employer Address 1 is required.
- Dislocation Employer City is required.
- Dislocation Employer State is required.
- Dislocation Employer Zip/Postal Code is required.
- Dislocation Employer Hourly Wage is required.

**Education Tab**

Use the Education tab to define the individual’s education information related to education for high school equivalency and federally report high school grade completed. For Dislocated Worker eligibility, this may involve simply verifying fields already populated, based on educational information gathered at registration (or for a previous Adult Eligibility).



The screenshot shows the 'WIOA Wizard' interface. At the top, a progress bar indicates the following steps: Start (checked), Contact (checked), Demographics (checked), Veteran (checked), Employment (checked), Education (active), Public Assistance (disabled), Barriers (disabled), Family Income (disabled), and Eligibility and Grants (disabled). The 'Education' tab is selected, showing two sections: 'WIOA Education Information' and 'Education Partner Services'. The 'WIOA Education Information' section includes fields for 'Highest School Grade Completed' (12th Grade Completed), 'High School Diploma or equivalent received' (Yes), 'Highest Education Level completed' (Attained a Bachelor's degree), 'Highest Grade and Educational Level' (Other Applicable Documentation), and 'School Status' (In-school: post Secondary School). The 'Education Partner Services' section includes radio buttons for 'Receiving services from Adult Education (WIOA Title II)', 'Receiving services from YouthBuild', 'Receiving services from Job Corps', and 'Receiving Services from Vocational Education (Carl Perkins)'. It also includes a field for 'YouthBuild Grant Number' and a dropdown for 'Individualized Education Program Participant' (Previous IEP). At the bottom, there is a checkbox for 'Check here to allow saving of a partial application', an 'Exit Wizard' link, and 'Back' and 'Next' buttons.

*WIOA Application – Educational Information Tab*

Enter WIOA Education Information:

- Select the highest secondary school grade completed, and indicate if a diploma or equivalent was received.
- Select current highest school grade completed.
- Select and verify the federally reported Highest Education Level Completed.
- Select and verify the current School Status.

Enter Educational Partner Services (if applicable):

- Identify if the individual is receiving services from:
  - Adult Education
  - Youth Build (if so, include Grant Number)
  - Job Corps
  - Vocation Education
- When finished, click **Next** to save your edits and proceed.

**Public Assistance Tab**

For a Dislocated Worker application, the Public Assistance fields listed are mainly Yes/No fields for each type of assistance and require an indication of validation if the response is Yes.

**WIOA Wizard**

Start Contact Demographics Veteran Employment  
Education Public Assistance Barriers Family Income Eligibility and Grants

**Public Assistance**

*Individual or member of a family that is receiving, or in the past 6 months has received, the following:*

\* **Temporary Assistance for Needy Families (TANF):**  Yes  No  
**TANF Recipient:**  Applicant  Family Member  Not Applicable/Unknown  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

\* **Supplemental Security Income (SSI):**  Yes  No  
**SSI Recipient:**  Applicant  Family Member  Not Applicable/Unknown  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

\* **General Assistance (GA):**  Yes  No  
**GA Recipient:**  Applicant  Family Member  Not Applicable/Unknown  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

\* **Supplemental Nutrition Assistance Program (SNAP):**  Yes  No  Unknown  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

\* **Refugee Cash Assistance (RCA)**  Yes  No  
**RCA Recipient:**  Applicant  Family Member  Not Applicable/Unknown  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

*Individual receives, or in the last 6 months, received:*

\* **Social Security Disability Insurance Income (SSDI):**  Yes  No  
[Verify](#)

*Individual currently meets the following:*

\* **Receiving services under SNAP Employment & Training Program:**  Yes  No  Unknown  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#) | [View](#)  
 Court documentation

\* **Receiving, or has been notified will receive, Pell Grant:**  Yes  No  Unknown

\* **Ticket to Work Holder issued by the Social Security Administration:**  Yes  No  Unknown

Check here to allow saving of a partial application  
[Exit Wizard](#)

[<< Back](#)   [Next >>](#)

**SNAP Food Stamp Verification**

Current authorization to obtain food stamps  
 Letter from food stamp disbursing agency  
 Postmarked food stamp mailer with applicable name and address  
 Public assistance records/printout

[Reset](#)

Public Assistance Tab for Dislocated Worker

► **To complete the tab:**

- Indicate **Yes** on each of the assistance options that apply and verify the assistance accordingly.
- Click **Next** to save your edits and proceed or click [Exit Wizard](#) to save a partial application.

**Note:** Applications for “Youth” eligibility will have additional questions and may ask if assistance is for the applicant or a family member. See

[Public Assistance Tab for Youth](#) for more information.

## Barriers Tab

The Barriers tab for the WIOA application has been organized into two areas: Individual Barriers and Barriers to Employment.

### Individual Barriers:

The section includes the individual's abilities and history barriers (e.g., English language learner, High School Drop Out, Basic Skills Deficient, plus Homeless and Offender retained).

- Select any individual barriers that apply.
- Use the Verify link to identify the document, record, scores, etc., used to verify the barrier.

### Barriers to Employment:

The section includes barriers for displaced homemaker, cultural barriers, and farmworker identification.

- Select any employment barriers that apply.
- Use the Verify link if it applies (e.g., if you select Yes for Displaced Homemaker status).

**WIOA Wizard**

Start Contact Demographics Veteran Employment

Education Public Assistance Barriers Family Income Eligibility and Grants

**Individual Barriers**

- \* English language learner  Yes  No  
[ Verify | Scan | Upload | Link ]
- \* Basic Skills Deficient/Low Levels of Literacy  Yes  No  
[ Verify | Scan | Upload | Link ]
- Add/View Basic skills scores: [Click Here](#)
- \* Homeless:  Yes  No  
[ Verify | Scan | Upload | Link ]
- \* Ex-Offender - individual has been arrested/convicted of a crime:  Yes  No  Did not disclose  
[ Verify | Scan | Upload | Link ]  
✓ Police records

**Barriers to Employment**

- Disabled: Yes
- \* Displaced Homemaker: No [ Verify | Scan | Upload | Link ]
- Meets long term unemployment definition: Yes
- \* Within 2 years of exhausting TANF lifetime eligibility:  Yes  No  
[ Verify | Scan | Upload | Link ]
- Older individual (age 55 and older): No
- \* Hawaiian Native:  Yes  No  
*Hawaiian or Pacific Islander is not selected as a Race for this individual. Please update the Demographics section if this is not accurate.*
- \* American Indian/Alaskan Native: No
- \* Single Parent (including single pregnant women):  Yes  No  Participant did not self-identify
- \* Cultural Barriers:  Yes  No  Participant did not self-identify
- \* Eligible Migrant Season Farmworker as defined in WIOA Sec 167(l):  Yes  No
- \* Meets Governor's special barriers to employment:  Yes  No

Check here to allow saving of a partial application

[Exit Wizard](#) << Back Next >>

*Most Individual Barriers require verification.*

### WIOA Application – Barriers Tab - Individual Barriers Section

**Note:** The displayed Individual Barriers are more extensive when staff are applying for Youth eligibility type..

- Click **Next** to save your edits and proceed or click Exit Wizard to save a partial application.

## Family Income Tab

The Family Income tab for the WIOA Dislocated Worker application is the same as it is for the WIOA Adult Application.

- The tab will indicate, in red text, whether family size and income information are optional in determining Low Income Status (i.e., if Low Income is already established).
- Other items (e.g., data from Public Assistance or Barriers) may establish that Low Income is met, so that entering data on this screen may not be required and it will only contain a statement confirming the status is met.

### ► To complete the tab:

- 1 Identify **Family Size** and use the Verify link to indicate documentation used to verify the size.
- 2 Enter the Annualized Family Income.

**Note:** You can click the link at the bottom of the screen to see a table for low income, if needed.

**WIOA Wizard**

Start Contact Demographics Veteran Employment  
Education Public Assistance Barriers **Family Income** Eligibility and Grants

**Family Income**

\* Due to the individual's disability, they qualify as a Family of 1:  Yes  No

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

\* Family Size: 1 [Verify | Scan | Upload | Link]

\* Annualized Family Income: 16036.00 [Verify | Scan | Upload | Link]  
 Pay stubs

[Income Table](#)

Check here to allow saving of a partial application

[Exit Wizard](#)

<< Back Next >>

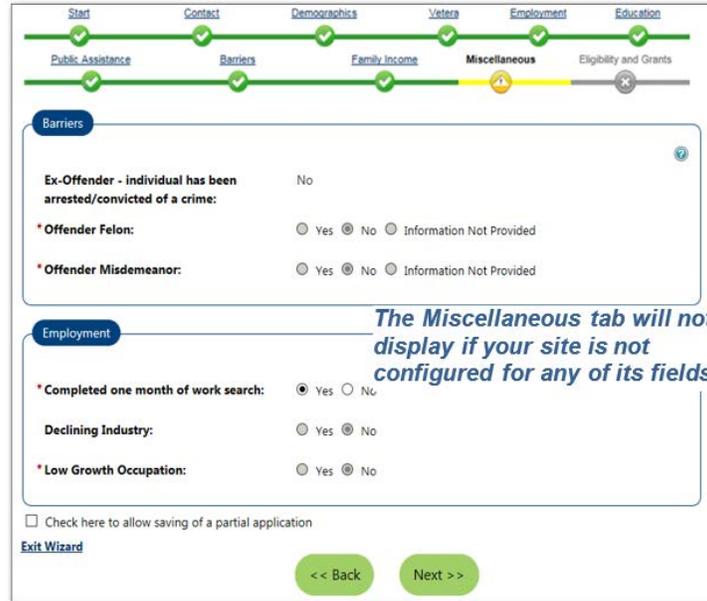
Family Unit Size	METRO	NON-METRO
1	\$11,880	\$11,880
2	\$16,020	\$16,020
3	\$20,300	\$20,169
4	\$25,062	\$24,898
5	\$29,579	\$29,382
6	\$34,595	\$34,361
7	\$39,611	\$39,340
8	\$44,627	\$44,319
For each additional person in a family above eight, add	\$5,016 per person	\$4,979 per person

### WIOA Application – Family Income Tab

- 3 Click **Next** to save your edits and proceed or click Exit Wizard to save a partial application.

### Miscellaneous Tab

The Miscellaneous tab for the WIOA Application handles custom fields, each of which can be configured for a specific customer's site. The possible data on this tab is organized into three areas: Adult Priority, Barriers, and Employment.



WIOA Application – Miscellaneous Tab

► **To complete the Miscellaneous tab:**

- 1 Select Yes or No in the appropriate fields.
- 2 Enter data in the remaining fields as necessary.
- 3 Click **Next** to save your edits and proceed.

### Eligibility & Grants Tab (Dislocated Workers)

The Eligibility & Grants tab for WIOA includes four sections:

- **Applicant Eligibility** – displays an eligibility matrix summarizing which customer program groups (eligibility types) the individual is eligible for, as well as priority of service conditions, and any reasons for not being eligible.

**Tip** *If the row is green (eligibility = Yes), and if no grants are applicable, you can skip to Staff Eligibility Information (bottom of the page), and click Next or Finish.*

- **WIOA Grant Eligibility** – displays state and national WIOA grant types for which the individuals may be eligible, based on their WIOA applicant eligibility. Staff can click Yes for a grant type that applies to the individual.
- **Grants** – lists specific state or local grants that can be associated with the individual. For example, if grant types are clicked Yes in WIOA Grant Eligibility, staff can review and select specific grants from a table, which controls access to the grant funding streams in activity/enrollment records.
- **Staff Eligibility Information** – contains the Case Manager assignment, staff comments, and staff case notes, as well as a link to access any WIA Legacy Application Data, if applicable.

## Applicant Eligibility

### Meets Low Income

The top of the Application Eligibility area has a display-only indication of whether the applicant meets the definition for low income. This will indicate *Yes* if Low Income was already established (based on previously verified low income related to responses entered on the Public Assistance tab or on the Family Income tab). Otherwise it will indicate *No*. Staff can also click a link to see a table for current low income guidelines, the same as the one on the Family Income tab.

**Applicant Eligibility**

Applicant meets the definition for low income: No

**Income Table:**

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

VET = Veteran, BSD = Basic Skills Deficient, PA = Public Assistance

Staff with privileges can set any eligibility as *Inactive*, so that the associated activities and related funding are not used in enrollments, or as part of reporting for that Enrollment/ Customer group.

### WIOA Application Eligibility & Grants Tab – Eligibility Determination Section

### Eligibility Matrix

The eligibility matrix is a table which has a row for each customer program group (i.e., each eligibility type) that staff may have identified for application on the first Intro tab.

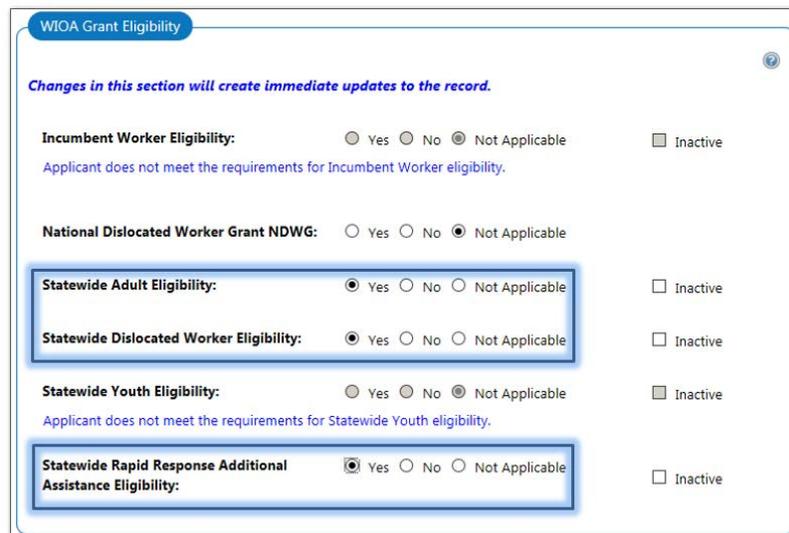
- The **Eligible** column indicates whether the applicant is *eligible* for services via that program type.
- The **Priority** column indicates the different priority statuses that apply to the individual (which staff must consider in addition to the basic eligibility status). Examples include Veteran (VET), Basic Skills Deficient (BSD), and Low Income (LI). *Priority* is important for staff who need to be aware of Priority of Service, because WIOA does not mandate the same level of business rules to enforce Priority of Service in Enrollments.
- The **Exceptions/Limitation** column is a column for youth and will be blank for dislocated workers.
- The **Reasons(s) Not Eligible** column will indicate identifiable reasons why eligibility is *No* or *Undetermined* in the Eligible column. For example:
  - If the eligibility type and date were not selected for Program Type on the Intro tab, this column will indicate *No Eligibility Date*.
  - If the No Dislocated Worker Category was selected on Employment tab.
- The **Action** column will include a checkbox for staff to *Inactivate* an individual who is eligible (i.e., in green). Checking this box, and also clicking the Save Checkboxes link below the matrix, will

discontinue the ability to enroll the individual in activities/services associated with that customer program group, but will not change their application status.

### WIOA Grant Eligibility

For possible WIOA grant eligibilities (based on the eligible program type), the buttons and checkbox are active and optional. They are defaulted to *Not Applicable*, staff can select *Yes*.

Grants are special programs, each specific grant having separate eligibility requirements.



WIOA Grant Eligibility Section

When a staff user selects *Yes*, and then adds a grant to the application record (using the table indicated in the following Grants area), it indicates staff have reviewed the eligibility requirements for the grant that are typically beyond formula eligibility requirements – typically requirements are specific barriers or characteristics based upon the Grant requirements.

- **Not Applicable** – is the default value when the tab/screen loads, and indicates staff have done nothing to evaluate the applicant for eligibility.
- **No** – means a staff user has set the value to *No*, and grants for the particular grant type (funding) are not available to add to the application, which keeps enrollments from being created for those grants.
- **Yes** – a staff user has set the value to *Yes*, because they have determined specific grants may apply for this type. This enables the ability to [View Available Grants](#) (a link to the next Grants section on the tab).
- The **Inactive** checkbox can be selected (or deselected) during the course of the application, until the creation of the Outcome record. This selection controls access to funding streams in the Activity/Enrollment record(s).

### Eligible Grants

For Dislocated Worker eligibility, the active grant selections include:

- **National Dislocated Worker Grant NDWG** (formerly NEG) - Staff must have access to the Adult or the Dislocated Worker Eligibility group. This field can be modified when *Adult Eligibility* is set to 'Yes', or when *Dislocated Worker Eligibility* is set to 'Yes'.
- **Statewide Dislocated Worker Eligibility** - Staff must have access to the Dislocated Worker Eligibility group. This field can be modified only when *Dislocated Worker Eligibility* is set to 'Yes'.

### Non-Eligible Grants

For Dislocated Worker eligibility, the disabled selections include:

- **Statewide Incumbent Worker Eligibility** - Staff must have access to the Adult Basic Career Services Eligibility group or the Adult Eligibility group.
- **Statewide Youth Eligibility** - Staff must have access to the Youth Eligibility group.
- **Statewide Rapid Response Additional Assistance Eligibility** - Staff must have access to the Dislocated Worker Eligibility group.

### Non-WIOA Grant Eligibility

The Non-WIOA Grant eligibility entries that apply are *not* based on eligible program type. This section's specific grants display when the switch for either Non-WIOA Special Grants or Local Funded Grants is turned on. When on, the entries display as described below:

The screenshot shows a form titled "Non-WIOA Grants". Below the title, there is a section labeled "Non-WIOA Special Grants:" followed by three radio buttons: "Yes" (selected), "No", and "Not Applicable". To the right of these is a checkbox labeled "Inactive".

#### Non-WIOA Grants Section

**Non-WIOA Special Grants** - When the switch for Non-WIOA Special Grants is turned on, this field can be edited at any time, until an exit record exists for the application.

- Checkbox for **Non-WIOA Special Grants Inactive** - This checkbox can be selected or deselected during the course of the application, until the creation of the exit record. This selection controls access to funding streams in the Activity/Enrollment record(s).

**Local Funded Grants** - When the switch for Local Funded Grants is turned on, this field can be edited at any time, until an exit record exists for the application.

- Checkbox for **Local Funded Grants Inactive** - This checkbox can be selected or deselected during the course of the application, until the creation of the exit record. This selection controls access to funding streams in the Activity/Enrollment record(s), based on grant funding availability.

### Grants

Clicking the **Yes** radio buttons in the above sections activates the [View Available Grants](#) link, which staff can then select to generate a listing of all of the possible grants as a plain table of Grant types/IDs, along with the ERA/Local Grant Code, date added, and an [Add](#) link.

The screenshot shows a table titled "Grants". The table has a header with the following columns: Grant Type, Grant ID, Grant Name, ETA/Local Grant Code, Date Added, and Action. Below the header, the table body contains the text "No records found" and a link labeled "View Available Grants" with a mouse cursor pointing to it.

#### View Available Grants Link

The table displays all grants, active or inactive, for which the individual has been determined to be eligible.

**Note:** *The system will indicate when there are no grants associated to the application by displaying a "no records found" message. In the example below, where only National Dislocated Worker Grant NDWG was selected, two grants were displayed in the black and white "list of available grants" (Grant IDs 423 and 469), and Grant ID 423 was added, which moved it to the table above the list, as the added grant id 423.*

Grant Type	Grant ID	Grant Name	ETA/Local Grant Code	Date Added	Action
National DW Grant (NDWG)	423	Brevard Aerospace FLX4	FLX4	07/02/2015	<a href="#">Delete</a>

Select from the list of available grants.

Grant Type	Grant ID	Grant Name	ETA/Local Grant Code	Action
National DW Grant (NDWG)	469	JD NEG	469	<a href="#">Add</a>

The Grants section let staff display all available grants and add specific grant IDs for the Individual

Staff can click the [Add](#) link to add the specific Grant Types for the Individual.

The columns in the Grant table include:

- **ETA/Local Grant Code** - The system will display either the *Local Grant Code* or *ETA Grant Code*, depending on the record. If neither exists, the system will display "Not Defined".
- **Date Added** - The date the grant record was added to the application.

**Note:** Because this involves new functionality, WIA-converted grants will not have an accurate date of entry.

From the **Action** column, the **Delete** link is not enabled until an enrollment record has an **Actual Begin Date** associated to the grant. When clicked, the system will prompt staff to confirm their selection before deleting.

### Staff Eligibility Information

This area contains controls/fields for case assignment, comments, and case notes:

**Staff Eligibility Information**

Current Case Manager: Group: BMWIA  
Case Manager: LOCALONE, GSI  
Temporary Case Manager: Not Applicable  
[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)

Comments:  
Income level should be rechecked at later date.  
[ Spell Check ]

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

ID	Create Date	Subject	Action
138	10/20/2015	DW App	<a href="#">Edit</a>

Exit Wizard

#### Staff Eligibility Information Section

**Current Case Manager** – This displays the case assignment data, including:

- Group: *Case Assignment Group Name* of the Case Manager, if applicable.
- Case Manager: The assigned manager's last and first name.
- Temporary Case Manager Name: Only displays a name if applicable.

Assignment can be made/modified by the links:

- **Assign Case Manager** - Clicking this link allows staff to assign a case manager to this application (create/edit).
- **Assign Me** - Clicking this link allows staff to assign this application to his/her own case load.
- **Remove Case Manager Assignment** - Clicking this link allows staff to remove the Case Manager assigned to this application.

**Note:** *Depending on your site's configuration, the system may require case assignment to finish an application, or it may auto-assign a manager (based on defined management groups). For such configurations, you may see a message at the top of the tab, when you click Next or Finish, and an assignment is not made.*

- You must assign as Case Manager to this application.
- The system cannot automatically assign this Case. The Staff user is not assigned to a compatible group.
- **Comments** - This optional field lets staff add text (associate one of the Eligibility groups). A **Spell Check** link will check spelling for the entered text.
- **Add a new Case Note** - Opens the case note interface in a new window, and lets staff add a case note to the system.
- **Show Filter Criteria** - Lets staff perform a new case note search according to the filter criteria entered. Click the **Filter** link to refresh the current page to display your results.
- **Case Notes** - From the case notes table, click a link under the **Subject** column to view/edit an individual case note, or click **Edit** from the *Action* column. Click the envelope icon to send a message to the user.
- **WIA Legacy Application Data** - This link only displays below Case Notes if a WIA application was converted for WIOA. See the topic "Seeing WIA Legacy Data on the Eligibility Tab" for an example of legacy data.

### ***Finishing the Application***

Staff can click **Finish** or **Next** at the bottom of the screen:

- **Finish** will complete and close the application and return staff to the Programs tab. The Application will display as *Complete* for the Adult eligibility type.
- **Next** will complete and close the application, and will open the first tab for creating an enrollment in WIOA.

**Note:** *Finish will not create the Participation. When staff returns to the Programs tab to enroll the individual in services, they must create a participation record. Next automatically generates the participation record, before it opens Enrollment tabs.*

*See the steps under the topic "WIOA Service/Activity Enrollments" for more on the steps for enrollment after completion of an application. See the topic "WIOA Participation Form", if Finish was selected, and the form must be completed before starting enrollments.*

### **WIOA Application for a Youth**

To be eligible as a youth, the individual must:

- Be 14 to 24 years of age
- Be a citizen or noncitizen authorized to work in the U.S.
- Meet Selective Service registration requirements (if male and 18)

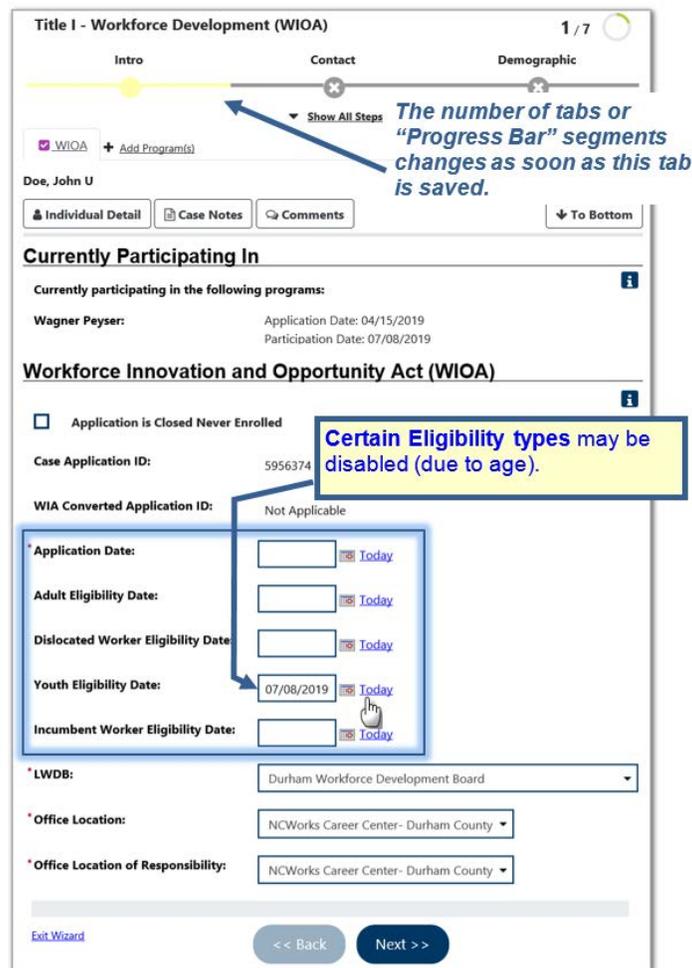
An *Eligible Youth* in WIOA means an in-School Youth (ISY) who is 14 to 21, or an Out of School Youth (OSY) who is 16 to 24. Staff can check the Youth Eligibility box for any individual 24 or under. However, the tabs which staff must complete for eligibility will include data used to make an In School Youth (ISY) or an Out of School Youth (OSY) eligibility determination.

► **To create a Youth Application:**

- 1 Under the WIOA bar on the Programs tab, click the [Create Title I - Workforce Development \(WIOA\) Application](#) link. The Intro tab displays.
- 2 Enter and/or review each date field that applies and review the location information.

**Note:** *The WIA Converted Application ID field only shows an ID for converted records. These also have a “WIA Legacy Data” link on the last Eligibility & Grants tab. See the topic “Seeing WIA Legacy Data on the Eligibility Tab” for more information.*

- 3 Review the remaining fields. You can see other programs that may also be available for funding needed activities or services if the individual is participating in any other programs.



*WIOA Application – Intro Tab for Youth*

- 4 Enter the **Application Date**. The Application Date cannot be greater than X days ago (the *lockdown date*), nor can it be greater than today’s date.
- 5 Enter the **Youth Eligibility Date**. The Eligibility Date for the selected eligibility type (i.e., Youth) cannot precede the Application Date, nor can it be greater than today’s date.

**Note:** This is not predetermined by Formula Program Eligibility, only by the individual's age. They must be 14 to 21 (In School), or 16-24 (Out of School). If they are older than 24, Youth Eligibility Date is disabled.

- 6 Below the eligibility date fields are prefilled location fields. Review and change fields, if needed.
- 7 Select the location information for **Local Workforce Development Board**, and standard **Office Location, Office Location of Responsibility**.
- 8 Click **Next** to save your edits and proceed to the Contact Information tab. If your data entry violates a business rule or is incomplete, the system will display red text messages upon clicking Next.
  - a. Fix the error and click **Next** again to proceed.

**Note:** If you click Exit Wizard, your data entry will NOT be saved. You must click Next at the Intro tab to save a partial application.

### Contact Information Tab for Youth

The Contact tab includes four areas: Contact Information, Current Address, Mailing Address, and Alternate Contacts. Many of the fields are prefilled from registration.

► **To complete the tab:**

- 1 Ensure that all required fields are entered.
- 2 Verify the SSN.

**Note:** Edit SSN is only available to staff with privileges.

Contact Information Tab

- 3 Verify the Current Address.

**Note:** This address used at application will display in a separate Address at Date of Application area if you return to the Contact tab after you save the initial data.

- 4 Make any additions or changes to Alternate Contacts using the Manage Alternate Contacts link.
- 5 Click **Next** to save your edits and continue to the Demographics tab.

**Note:** Depending on the site's configuration, you may need to click the Manage Alternate Contacts link and supply alternate contacts before the next step. You can also click a checkbox to save a partially completed application.

### Demographics Tab for Youth

The Demographics tab includes contains several fields for demographic information. Some of the available options on this application are dependent upon your system's configuration.

**WIOA Wizard**

Start Contact **Demographics** Veteran

Employment Education Eligibility and Grants

**Demographic Information**

\* **Date of Birth:** 06/14/1988 [Verify | Scan | Upload | Link]

**Age at Earliest Eligibility:** 28 (Today's Age: 28)

\* **Gender:**  Male  Female  Did not self-identify  
[Selective Service Website](#)

**Registered for the Selective Service:** Yes [Verify | Scan | Upload | Link]

**Selective Service Registration Number:** [ ]

**Selective Service Registration Date:** [ ]

\* **Authorization to Work in US:** None Selected [Verify | Scan | Upload | Link]

**Alien/Visa Registration Number:** [ ]

**Alien/Visa Expiration Date:** [ ]

\* **Considered to be of Hispanic heritage:**  Yes  No

\* **Considered to be of Haitian Heritage:**  Yes  No

\* **Race - Ethnicity:**  
 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  Participant did not self-identify  
[Verify | Scan | Upload | Link]

**Category of Disability :**  
 No disability  
 Physical/Chronic Health Condition  
 Physical/Mobility Impairment  
 Mental or Psychiatric Disability  
 Vision-related disability  
 Hearing-related disability  
 Learning Disability  
 Cognitive/Intellectual disability  
 Participant did not disclose type of disability

Check here to allow saving of a partial application  
[Exit Wizard](#)

<< Back Next >>

Demographics Tab

► **To complete the tab:**

- 1 Minimally, enter and/or verify:
  - Date of birth
  - Gender
  - Selective Service registration status, if applicable
  - Citizenship or Authorization to work in U.S.
  - Heritage and ethnicity
  - Disability (if they consider themselves to have one)
- 2 Click **Next** to save your edits and proceed, or click [Exit Wizard](#) to save a partial application.

### **Veteran Tab for Youth**

- If the youth *is not* a veteran, click **Next** to move past this tab.

**Note:** *You are only required to enter data on this tab for youth if the youth is a male, over 18, and a veteran still eligible as a youth. See the description of the Veteran Tab for an Adult application for any questions on the Veteran fields.*

### **Employment Tab for Youth**

Employment information is not as common for youth as for adults or dislocated workers; however, it still has required fields that must be completed for a Youth application. If they are not employed, only selecting *Not Employed* from the first field is required.

► **To complete the tab:**

Under Employment Information:

- Select and verify employment status.
- If this is *Not Employed*, you can click **Next** and move to the next screen.
- If any other answer, finish the remaining fields that apply:
  - Identify if underemployed (if individual is employed).
  - Identify if receiving unemployment.
  - Identify if individual is a farmworker.

**Note:** *If the individual received a notice of termination or military separation, consider applying with the eligibility type Dislocated Worker.*

Under Employment History:

- Identify any relevant employment history, if it applies for the youth applicant.

See the description for this tab under “*WIOA Application for an Adult*” for any questions on the Employment fields.

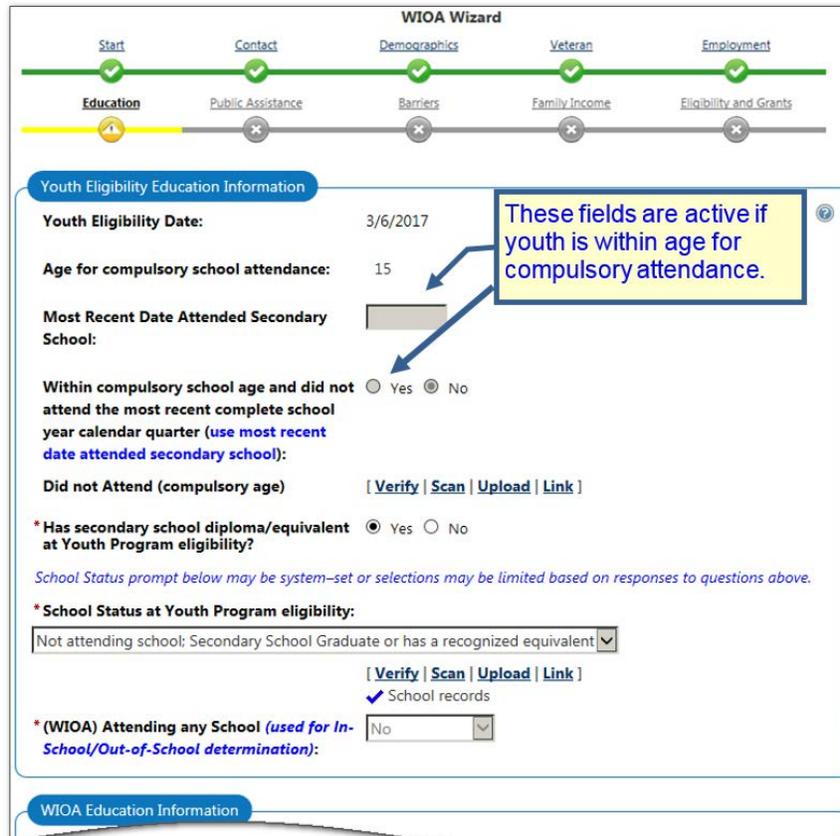
### **Education Tab for Youth**

The youth emphasis is on employment for Out of School Youth (OSY). “*WIOA requires a minimum of 75 percent of State and Local youth funding to be used for OSY.*” Therefore, additional fields are displayed for youth education data, particularly to document school status for youth of compulsory age. Data is organized into three sections – the first section is Youth Eligibility Information.

Use this tab to define the individual's education, including high school level and highest education level, as well as any partner services for education. For Youth eligibility, this includes verifying education fields related to the highest school grade completed, current school status, and whether currently attending any school. This may include verifying fields that are already populated based on educational information gathered at registration.

Enter Youth Eligibility Education Information:

- If the youth's age is within *compulsory* range:
  - Enter the last date they last attended secondary school.
  - Indicate if they failed to attend during recent complete calendar quarter.
  - Select a verification if they did not attend during the recent quarter (Yes on previous question).
- Indicate if they have GED or HSE (at Youth Program eligibility).
- Select their School Status (at Youth Program eligibility).



*WIOA Application – Youth Eligibility Education Tab (for Youth)*

**Note:** The last field, Attending any School, is related to In School Youth determinations, and the system normally sets this to Yes or No based on the previous School Status selection.

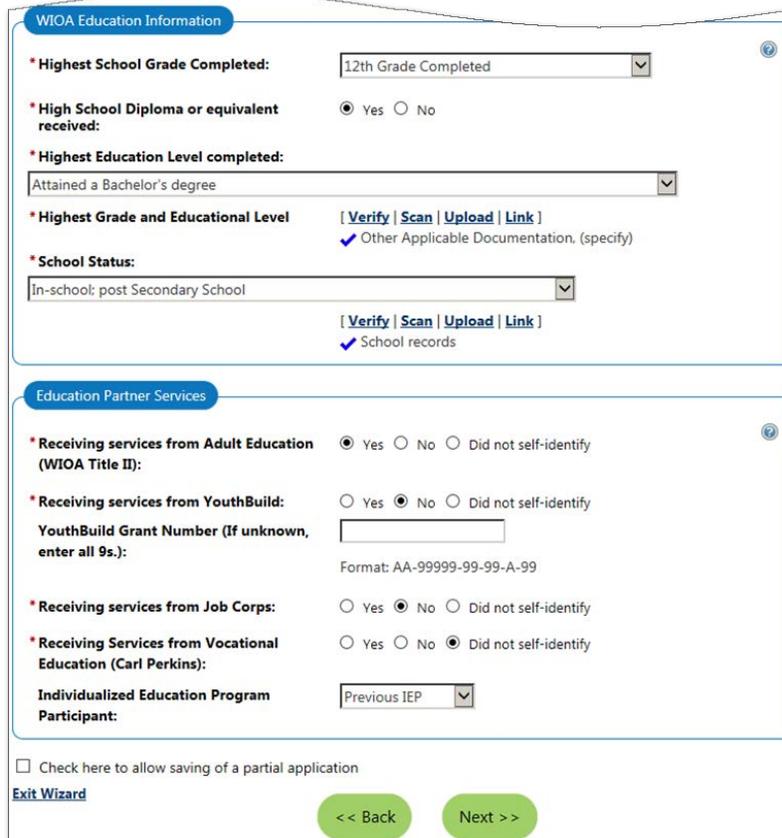
The next two sections are briefly described below. They are identical to the Education tab described under “WIOA Application for an Adult”.

Enter WIOA Education Information:

- Select the highest secondary school grade completed and indicate if a diploma or equivalent was received.
- Select current highest school grade completed.
- Select and verify the federally reported Highest Education Level Completed.

**Note:** Education Level for secondary school is High School Equivalent/GED. If the youth is still in secondary school, the selection would be “No education level completed.”

- Select and verify the current School Status.



The screenshot shows two sections of a web form:

- WIOA Education Information:**
  - Highest School Grade Completed:** 12th Grade Completed
  - High School Diploma or equivalent received:** Yes (selected)
  - Highest Education Level completed:** Attained a Bachelor's degree
  - Highest Grade and Educational Level:** [ Verify | Scan | Upload | Link ]  
Other Applicable Documentation, (specify)
  - School Status:** In-school; post Secondary School  
[ Verify | Scan | Upload | Link ]  
School records
- Education Partner Services:**
  - Receiving services from Adult Education (WIOA Title II):** Yes No Did not self-identify
  - Receiving services from YouthBuild:** Yes No (selected) Did not self-identify  
YouthBuild Grant Number (If unknown, enter all 9s.):  
Format: AA-99999-99-99-A-99
  - Receiving services from Job Corps:** Yes No (selected) Did not self-identify
  - Receiving Services from Vocational Education (Carl Perkins):** Yes No (selected) Did not self-identify  
Individualized Education Program Participant: Previous IEP

At the bottom, there is a checkbox for "Check here to allow saving of a partial application", a link for "Exit Wizard", and two buttons: "<< Back" and "Next >>".

*WIOA Application – Educational Info (Sections 2 and 3)*

Enter Educational Partner Services (if applicable):

- Identify if the individual is receiving services from:
  - Adult Education
  - YouthBuild (if so, include Grant Number)
  - Job Corps
  - Vocation Education
  - Individualized Education Program
- Identify if the individual is, or was, an Individualized Education Program (IEP) participant.
- When finished, click **Next** to save your edits and proceed.

### Public Assistance Tab for Youth

On the Public Assistance tab, answer each of the statements about assistance that the youth applicant receives.

**WIOA Wizard**

Start Contact Demographics Veteran Employment  
Education Public Assistance Barriers Family Income Eligibility and Grants

**Public Assistance**

*Individual or member of a family that is receiving, or in the past 6 months has received, the following:*

\* **Temporary Assistance for Needy Families (TANF):**  Yes  No  
**TANF Recipient:**  Applicant  Family Member  Not Applicable/Unknown  
[\[ Verify | Scan | Upload | Link \]](#)

\* **Supplemental Security Income (SSI):**  Yes  No  
**SSI Recipient:**  Applicant  Family Member  Not Applicable/Unknown  
[\[ Verify | Scan | Upload | Link \]](#)

\* **General Assistance (GA):**  Yes  No  
**GA Recipient:**  Applicant  Family Member  Not Applicable/Unknown  
[\[ Verify | Scan | Upload | Link \]](#)

\* **Supplemental Nutrition Assistance Program (SNAP):**  Yes  No  Unknown  
[\[ Verify | Scan | Upload | Link \]](#)

\* **Refugee Cash Assistance (RCA):**  Yes  No  
**RCA Recipient:**  Applicant  Family Member  Not Applicable/Unknown  
[\[ Verify | Scan | Upload | Link \]](#)

*Individual receives, or in the last 6 months, received:*

\* **Social Security Disability Insurance Income (SSDI):**  Yes  No  
[\[ Verify | Scan | Upload | Link \]](#)

*Individual currently meets the following:*

\* **Foster Child (State or local payments are made for applicant):**  Yes  No  
[\[ Verify | Scan | Upload | Link \]](#)  
 Court documentation

**Foster Child Verification**  
 Court contact  
 Court documentation  
 Verification of payments made on behalf of the child  
 Written statement from state/local agency  
[Reset](#)

\* **Youth currently living in a high-poverty area:**  Yes  No  Information Not Provided  
[\[ Verify | Scan | Upload | Link \]](#)

\* **Youth currently receives, or is eligible to receive, free or reduced lunch under the Richard B. Russell National School Lunch Act:**  Yes  No  Information Not Provided  
[\[ Verify | Scan | Upload | Link \]](#)

\* **Receiving services under SNAP Employment & Training Program:**  Yes  No  Unknown

\* **Receiving, or has been notified will receive, Pell Grant:**  Yes  No  Unknown

\* **Ticket to Work Holder issued by the Social Security Administration:**  Yes  No  Unknown

Check here to allow saving of a partial application  
[Exit Wizard](#)  
[<< Back](#) [Next >>](#)

WIOA Application – Public Assistance Tab, for Youth

For a Youth application, there are some differences:

- Additional Public Assistance fields (as shown in the figure above).
- Most assistance types require both a Yes/No selection and also ask if assistance is for the applicant, for a family member, or if recipient in the household is not applicable/unknown.

Similar to the tab for Adult applications:

- Fields for most type of assistance will require an indication of validation if the response is Yes.
- Blue text above groups of assistance questions helps clarify time periods for each assistance question asked.

► **To complete the Public Assistance tab:**

- Indicate Yes on each of the assistance options that apply.
- Where possible, indicate if assistance is for the applicant or for a family member.
- Verify the assistance accordingly.

In the last section, “*Individual currently meets the following*”:

- Carefully consider each additional question for youth in this area.

These include meeting assistance considerations for items such as: Foster child, High-poverty area, Lunch program, SNAP, etc.

- Click **Next** to save your edits and proceed or click [Exit Wizard](#) to save a partial application.

### **Barriers Tab (for Youth)**

The Barriers tab for the WIOA application has two areas: Individual Barriers and Barriers to Employment.

#### **Individual Barriers**

This section includes the individual’s abilities and history barriers (e.g., English language learner, basic skills deficient, homeless, ex-offender), as well as several additional barriers specific to youth applicants (e.g., high school runaway, foster care, parenting, and others).

- Select any individual barriers that apply.
- Use the [Verify](#) link to identify the document, score, etc., used to verify the barrier.

**WIOA Wizard**

Start Contact Demographics Veteran Employment  
Education Public Assistance Barriers Family Income Eligibility and Grants

**Individual Barriers**

\* English language learner  Yes  No  
[ Verify | Scan | Upload | Link ]

High School drop out (WIOA Definition): No  
Not attending school; within age of compulsory school attendance: No

\* Basic Skills Deficient/Low Levels of Literacy  Yes  No  
[ Verify | Scan | Upload | Link ]

Add/View Basic skills scores: [Click Here](#)

\* Homeless:  Yes  No  
[ Verify | Scan | Upload | Link ]

\* Runaway:  Yes  No  
[ Verify | Scan | Upload | Link ]

\* Youth in, or aged out of, Foster Care:   
[ Verify | Scan | Upload | Link ]

\* Ex-Offender - individual has been arrested/convicted of a crime:  Yes  No  Did not disclose  
[ Verify | Scan | Upload | Link ]

\* Incarcerated at Program Entry:  Yes  No  
Date Released from Incarceration:  (mm/dd/yyyy)

\* Pregnant/Parenting youth:  Yes  No  
[ Verify | Scan | Upload | Link ]

\* Youth Requires Additional Assistance to complete an educational program or to secure/hold employment:  Yes  No  
[ Verify | Scan | Upload | Link ]

\* Out-of-Home Placement:  Yes  No  
[ Verify | Scan | Upload | Link ]

\* Eligible under Section 477 of the Social Security Act:  Yes  No  
[ Verify | Scan | Upload | Link ]

**Out of Home Placement Verification**  
 Letter from appropriate state/local social service agency.  
 Self Attestation

WIOA Application – Barriers Tab (individual Barriers area)

**Notes:** Yes selections require verification. A basic skills deficiency may include Basic Skills Assessments, which can be recorded on this screen, using the same assessment screen that is also used for skills assessments in initial program assessment (e.g., Wagner-Peyser).

Add/View Basic skills scores: [Click Here](#)

[Add/View Basic Skills Scores](#)

**Note:** Some fields, such as Gang Status or Parolee Number, will display as a Barriers section on the Miscellaneous tab, which is exclusively for all configurable data elements.

### Barriers to Employment

The section includes barriers for displaced homemaker, cultural barriers, and farmworker identification.

- Select any employment barriers that apply.
- Use the Verify link if it applies (e.g., if you select Yes for Displaced Homemaker status).

WIOA Application – Barriers Tab (Employment Barriers area)

- Click **Next** to save your edits and proceed.

**Note:** If the applicant is an In-School Youth, they may not be eligible for any WIOA services unless barriers are indicated.

### The Family Income Tab

The Family Income tab for youth is the same as for Adult or Dislocated application. It may help identify low income for the individual if not already established.

**Note:** The tab will indicate whether family size and income are optional (i.e., if Low Income is already established).

#### ► To complete the tab (if family size and income are required):

- Identify Family Size (using the drop-down list) and use Verify to indicate documentation used.
- Enter the Annualized Family Income.

**WIOA Wizard**

Start Contact Demographics Veteran Employment  
Education Public Assistance Barriers Family Income Eligibility and Grants

Family Income

\* Due to the individual's disability, they qualify as a Family of 1:  Yes  No

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

\* Family Size: 1 [Verify] [Scan] [Upload] [Link]

\* Annualized Family Income: 16036.00 [Verify] [Scan] [Upload] [Link]  
 Pay stubs  
[Income Table](#)

Check here to allow saving of a partial application

Exit Wizard

<< Back Next >>

**Employ Florida - Income Level Guidelines - Software Quality Assurance Home**

Income Level Guidelines  
Effective Date: 5/13/2009

Family Unit Size	METRO	NON-METRO
1	\$10,830	\$10,830
2	\$14,570	\$14,570
3	\$18,310	\$18,310
4	\$22,500	\$22,050
5	\$26,556	\$25,790
6	\$31,058	\$29,935
7	\$35,560	\$34,273
8	\$40,062	\$38,611
For each additional person in a family above eight, add	\$4,502 per person	\$4,338 per person

WIOA Application – Family Income Tab

- Click **Next** to save your edits and proceed.

**Note:** You can click a link at the bottom of the screen to see a table for low income amounts.

### Miscellaneous Tab

The Miscellaneous tab will display only if custom fields were configured for your specific site. The data on this Miscellaneous tab may include fields such as Gang Status or Substance Abuse.

For most customers, this field will not display. For more on how this tab may display, if your site is configured for it, see the topic “Miscellaneous Tab” described under the Adult Application details.

### Eligibility & Grants Tab

The Eligibility & Grants tab for WIOA includes four sections:

- **Applicant Eligibility** – displays an eligibility matrix summarizing which customer program groups (eligibility types) the individual is eligible for, as well as priority of service conditions, and any reasons for not being eligible.

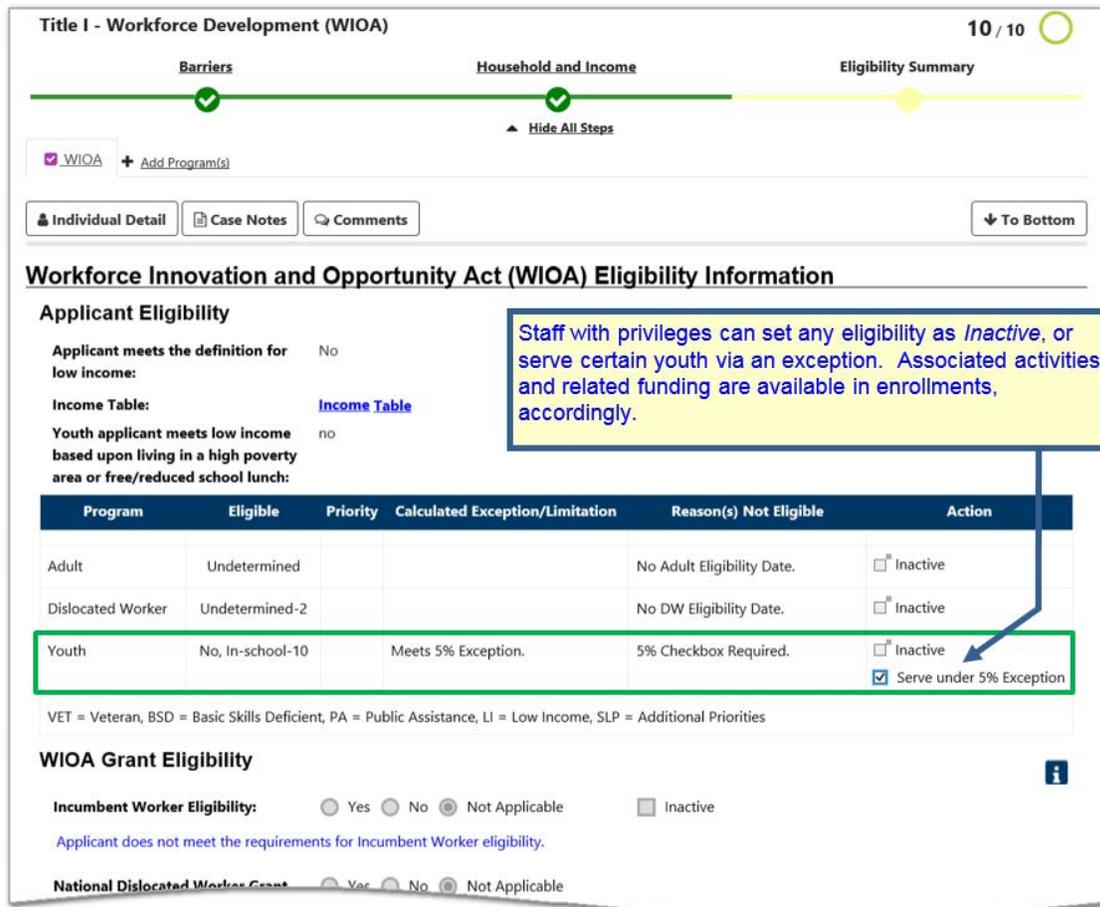
**Tip** If the row is green (eligibility = Yes), and if no grants are applicable and no exceptions need to be selected, you can skip to Staff Eligibility Information (bottom of the page), and click Next.

- **WIOA Grant Eligibility** – displays state and national WIOA grant eligibility, which controls access to Grant funding streams in the Activity/Enrollment record.
- **Grants** – displays listings for an ETA/Local grant that are associated, or can be associated, with the individual.
- **Staff Eligibility Information** – contains the Case Manager assignment, staff comments, and staff case notes, as well as a link to access any WIA Legacy Application Data, if applicable.

## Applicant Eligibility

### Meets Low Income

The top of the Application Eligibility area has a display-only indication of whether the applicant meets the definition for low income. This will indicate *Yes*, if Low Income was already established (based on previously verified low income related to responses entered on the Public Assistance tab, or on the Family Income tab). Otherwise it will indicate *No*. Staff can also click a link to see a table for current low income guidelines, the same as the one on the Family Income tab.



**Applicant Eligibility**

Applicant meets the definition for low income: No

Income Table: [Income Table](#)

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

Program	Eligible	Priority	Calculated Exception/Limitation	Reason(s) Not Eligible	Action
Adult	Undetermined			No Adult Eligibility Date.	<input type="checkbox"/> Inactive
Dislocated Worker	Undetermined-2			No DW Eligibility Date.	<input type="checkbox"/> Inactive
Youth	No, In-school-10		Meets 5% Exception.	5% Checkbox Required.	<input type="checkbox"/> Inactive <input checked="" type="checkbox"/> Serve under 5% Exception

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

**WIOA Grant Eligibility**

**Incumbent Worker Eligibility:**  Yes  No  Not Applicable  Inactive

Applicant does not meet the requirements for Incumbent Worker eligibility.

**National Dislocated Worker Grant:**  Yes  No  Not Applicable

WIOA Application Eligibility & Grants Tab – Eligibility Determination Section

### Eligibility Matrix

The eligibility matrix is a table which has a row for each customer program group (i.e., each eligibility type) that staff may have identified for the application on the first Intro tab.

- The **Eligible** column indicates whether the applicant is *eligible* for services via that program type.
- The **Priority** column will indicate the different priority statuses that apply to the individual, which staff must consider for priority of services, in addition to the basic eligibility status (e.g., Basic Skills Deficient, and Low Income).
- The **Calculated Exception/Limitation** column is primarily for exceptions/limitations that are determining possible eligibility, which staff must consider.

For example, the Eligible column may indicate *No* for *In-School* youth (as in the figure above), and the Reason(s) column may indicate *5% Checkbox Required*, indicating that select staff

would need to check the *Served under 5% Exception* box in the Action column, before finishing the application, to treat the individual as eligible and continue to Participation.

- The **Reason(s) Not Eligible** column will indicate identifiable reasons why eligibility is *No* or *Undetermined* in the Eligible column. For example:
  - If the eligibility type and date were not selected for Program Type on the Intro tab, this column will indicate *No Eligibility Date*.
  - If the Calculated Exception/Limitation column indicated *Meets 5% Exception*, this column may indicate *5% Exception Checkbox Required* (the action to proceed as eligible).
- The **Action** column will include a checkbox for staff to *Inactivate* an individual who is eligible (i.e., in green). This will discontinue the ability to enroll them in activities/services associated with that customer program group, but will not change their application status. The column may include other checkboxes, if any other scenario allows for a staff action (e.g., despite *No* or *Undetermined* in the Eligible column). For example, if a 5% Exception is required to be eligible, and staff is allowed to grant that exception, then a “*Service under 5% Exception*” checkbox displays.

**Note:** *Once staff has checked or unchecked a box in the Action column, they must click the **Finish** button, before that change is saved for the application.*

### WIOA Grant Eligibility

For possible WIOA grant eligibilities (based on the eligible program type), the buttons and checkbox are active and optional. They are defaulted to *Not Applicable* — staff can select *Yes*.

Grants are special programs, with each specific grant having separate eligibility requirements.

#### WIOA Grant Eligibility Section

When a staff user selects *Yes*, and then adds a grant to the application record (using the table shown in the following Grants area), it indicates staff have reviewed the eligibility requirements for the grant that are usually beyond formula eligibility requirements – typically requirements are specific barriers or characteristics based upon the Grant requirements.

- **Not Applicable** – is the default value when the tab/screen loads and indicates staff have done nothing to evaluate the applicant for eligibility.
- **No** – means a staff user has set the value to *No* and grants for the particular grant type (funding) are not available to add to the application, which keeps enrollments from being created for those grants.
- **Yes** – a staff user has set the value to *Yes*, because they have determined specific grants may apply for this type. This enables the ability to View Available Grants (a link the next Grants section on the tab).

- The Inactive checkbox can be selected (or deselected) during the course of the application, until the creation of the Outcome record. This selection controls access to funding streams in the Activity/Enrollment record(s).

**Eligible Grants:** For Youth eligibility, the active grant selection typically includes one grant type:

### Statewide Youth Eligibility

Staff must have access to the **Youth Eligibility** group. This field can be modified only if *Youth Eligibility* is set to 'Yes'.

### Non-WIOA Grant Eligibility

The possible Non-WIOA Grant eligibility entries that apply are not based on eligible program type. This section's specific grants display when the switch for either **Non-WIOA Special Grants** or **Local Funded Grants** is turned on. When on, the entries display as described below:



Non-WIOA Grants

Non-WIOA Special Grants:  Yes  No  Not Applicable  Inactive

*Non-WIOA Grants Section*

**Non-WIOA Special Grants** - When the switch for **Non-WIOA Special Grants** is turned on, this field can be edited at any time, until an exit record exists for the application.

- Checkbox for **Non-WIOA Special Grants Inactive** - This checkbox can be selected or deselected during the course of the application, until the creation of the exit record. This selection controls access to funding streams in the Activity/Enrollment record(s).

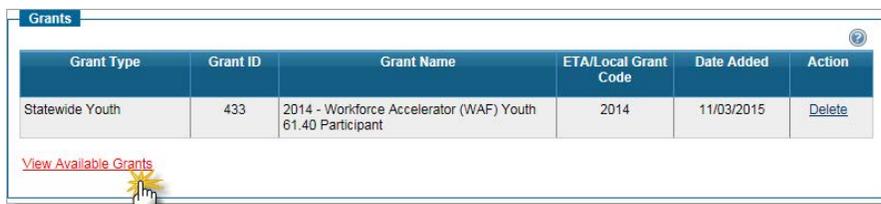
**Local Funded Grants** - When the switch for **Local Funded Grants** is turned on, this field can be edited at any time, until an exit record exists for the application.

- Checkbox for **Local Funded Grants Inactive** - This checkbox can be selected or deselected during the course of the application, until the creation of the exit record. This selection controls access to funding streams in the Activity/Enrollment record(s), based on grant funding availability.

### Grants

Once types of grants are selected in the two sections above, staff can click the [View Available Grants](#) link to see all of the possible grants. This will display a table of grants.

Clicking the **Yes** radio buttons in the above sections activates the [View Available Grants](#) link, which staff can then click to activate/display a tables of Grant types/IDs.



Grant Type	Grant ID	Grant Name	ETA/Local Grant Code	Date Added	Action
Statewide Youth	433	2014 - Workforce Accelerator (WAF) Youth 61.40 Participant	2014	11/03/2015	<a href="#">Delete</a>

[View Available Grants](#)

*View Available Grants Link*

The table displays all grants, active or inactive, for which the individual has been determined to be eligible.

**Note:** *The system will indicate when there are no grants associated to the application by displaying a "no records found" message. In the example below (where only **Youth Eligibility** was selected), one grant was displayed in the black and white "list of available grants" (Grant IDs), which was added (and moved to the table above the list, as the added grant id 433).*



Grant Type	Grant ID	Grant Name	ETA/Local Grant Code	Date Added	Action
No records found					
Select from the list of available grants.					
Statewide Youth	433	2014 - Workforce Accelerator (WAF) Youth 61.40 Participant	2014		Add

The Grants sections let staff display available grants and add specific grant IDs

Staff can then click the Add link to add the specific Grant Types for the Individual.

The columns in the Grant table include:

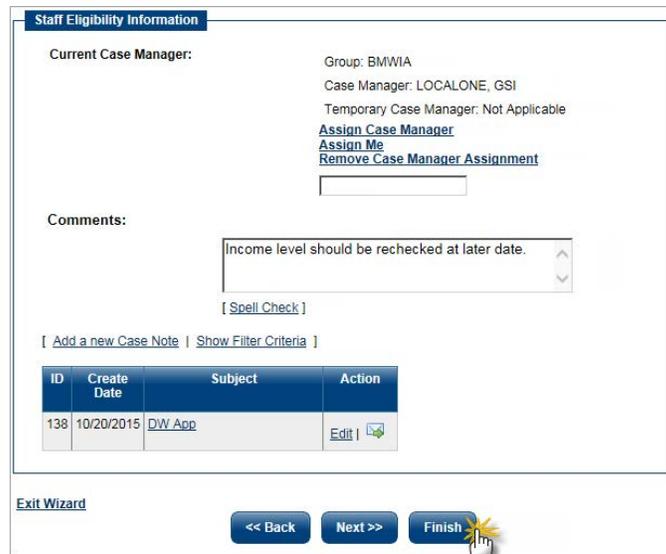
- **ETA/Local Grant Code** - The system will display either the *Local Grant Code* or *ETA Grant Code*, depending on the record. If neither exists, the system displays "Not Defined."
- **Date Added** - The date the grant record was added to the application.

**Note:** *Because this involves new functionality, WIA-converted grants will not have an accurate date of entry.*

From the **Action** column, the **Delete** link is not enabled until an enrollment record has an **Actual Begin Date** associated to the grant. When clicked, the system will prompt staff to confirm their selection before deleting.

### Staff Eligibility Information

This area contains controls/fields for case assignment, comments, and case notes:



**Staff Eligibility Information**

Current Case Manager: Group: BMWIA  
Case Manager: LOCALONE, GSI  
Temporary Case Manager: Not Applicable  
[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)

Comments: Income level should be rechecked at later date.  
[ Spell Check ]

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

ID	Create Date	Subject	Action
138	10/20/2015	DW App	Edit   

[Exit Wizard](#)    << Back    Next >>    Finish 

Staff Eligibility Information Section

**Current Case Manager** – This displays the case assignment data, including:

- Group: *Case Assignment Group Name* of the Case Manager, if applicable.
- Case Manager: The assigned manager's last and first name.
- Temporary Case Manager Name: Only displays a name, if applicable.

Assignment can be made/modified by the links:

- **Assign Case Manager** - Clicking this link allows staff to assign a case manager to this application (create/edit).
- **Assign Me** - Clicking this link allows staff to assign this application to his/her own case load.
- **Remove Case Manager Assignment** - Clicking this link allows staff to remove the Case Manager assigned to this application.

**Note:** *Depending on your site's configuration, the system may require case assignment to finish an application, or it may auto-assign a manager (based on defined management groups). For such configurations, you may see a message at the top of the tab when you click **Next** or **Finish**, and an assignment is not made.*

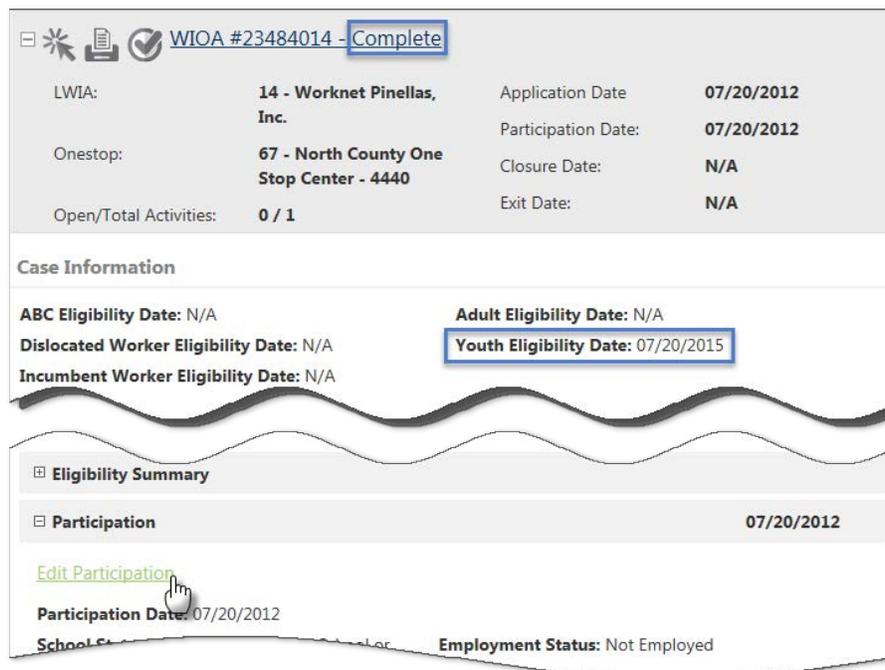
- You must assign as Case Manager to this application.
- The system cannot automatically assign this case. The Staff user is not assigned to a compatible group.
- **Comments** - This optional field lets staff add text (associate one of the Eligibility groups). A **Spell Check** link will check spelling for the entered text.
- **Add a new Case Note** - Opens the case note interface in a new window, and lets staff add a case note to the system.
- **Show Filter Criteria** - Lets staff perform a new case note search according to the filter criteria entered. Click the **Filter** link to refresh the current page to display your results.
- **Case Notes** - From the case notes table, click a link under the **Subject** column to view/edit an individual case note, or click **Edit** from the *Action* column. Click the envelope icon to send a message to the user.
- **WIA Legacy Application Data** - This link only displays below Case Notes if a WIA application was converted for WIOA. See the topic "*Seeing WIA Legacy Data on the Eligibility Tab*" for an example of legacy data.

### ***Finishing the Application***

Staff can click **Next** or **Finish** at the bottom of the screen:

- **Next** will complete and close the application, and open the first WIOA enrollment tab. (It automatically generates the participation record, before opening Enrollment tabs.)
- **Finish** will complete and close the application, and return staff to the Programs tab. (If **Finish** is selectable, it does not create the Participation record. When staff returns to the Programs tab to enroll the individual in services, they must create a participation record.)

When staff finishes the application (or the first enrollment after the application), the Application will display as *Complete* for the Youth eligibility type.



WIOA #23484014 - Complete			
LWIA:	14 - Worknet Pinellas, Inc.	Application Date:	07/20/2012
Onestop:	67 - North County One Stop Center - 4440	Participation Date:	07/20/2012
Open/Total Activities:	0 / 1	Closure Date:	N/A
		Exit Date:	N/A

**Case Information**

ABC Eligibility Date: N/A      Adult Eligibility Date: N/A  
 Dislocated Worker Eligibility Date: N/A      Youth Eligibility Date: 07/20/2015  
 Incumbent Worker Eligibility Date: N/A

**Eligibility Summary**

Participation 07/20/2012

[Edit Participation](#)

Participation Date: 07/20/2012

School Status:      Employment Status: Not Employed

A completed WIOA Application displays the Participation link, after **Finish** is pressed.

**Notes:** The Finish button may not display for Youth enrollments, depending on your system's configuration. The system may require an initial enrollment (e.g., Initial Assessment) along with Literacy and Numeracy evaluations, followed by an Individual Employment Plan as the first two steps.

See the topic "WIOA Service/Activity Enrollments" for more on the steps for enrollment.

See the topic "Literacy & Numeracy Scores" for more on Literacy and Numeracy scores and pre-test and post-test assessments.

## WIOA Application for an Incumbent Worker

An Incumbent Worker has its own Eligibility Type and Eligibility Date in the WIOA Application Wizard. This means that staff can apply for an individual to receive WIOA services just for Incumbent Worker-related activities (e.g., for a State Incumbent Worker grant).

*WIOA Application - Intro Tab for Incumbent Worker*

Any individual that qualifies for this is likely to also qualify as another eligibility type (typically with an application for an *Adult*).

**Note:** *The following subtopics indicate the minimal information required for each tab, for this abbreviated adult eligibility type. For more details on any of the fields on these tabs, you can refer to the tab descriptions for the full topic, "WIOA Application for an Adult".*

► **To complete the Intro tab:**

- Identifying Information:
  - Review the fields.
- Currently Participating In:
  - Only displays if the individual has other application (e.g., Wagner Peyser).
- Under Application/Registration Information:
  - Enter the application date.
  - Select the desired eligibility type.
  - Enter an application date in the date field which displays for the application type.
- Under Location Information:
  - Select the location for Local Area, Office of Responsibility, and standard Office Location.

- Click **Next** to save your edits and complete the Intro tab.

### Contact Information Tab for Incumbent Worker

Many of the fields are prefilled from registration.



The screenshot shows a web form with a dropdown menu for "Country" set to "United States". Below it are links for "Verify", "Scan", "Upload", and "Link". A "Driver's License" option is checked with a blue checkmark. Under the heading "Application Address Verification", there is a list of radio button options: "Local WIA does not verify address", "Voter Registration Card", "Computer Printout from Government Agency", "Driver's License" (which is selected), "Food Stamp Award Letter", "Homeless - Primary Nighttime Residence", "Housing Authority Verification", "Insurance Policy (Residence and Auto)", and "Award Statements".

[Verify Link](#)

The only entries staff must make are verifications for SSN and for address.

**Note:** *Staff should also check that they reviewed mailing address, but it is not a required field.*

### Demographics Tab for Incumbent Worker

The Demographics tab includes several fields for demographic information, many of which are prepopulated from registration information.

**WIOA Wizard**

Start Contact **Demographics** Veteran

Employment Education Eligibility and Grants

**Demographic Information**

\* **Date of Birth:** 06/14/1988 [ Verify | Scan | Upload | Link ]

**Age at Earliest Eligibility:** 28 (Today's Age: 28)

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

**Selective Service Website**

**Registered for the Selective Service:** Yes [ Verify | Scan | Upload | Link ]

**Selective Service Registration Number:** [ ]

**Selective Service Registration Date:** [ ]

\* **Authorization to Work in US:** None Selected [ Verify | Scan | Upload | Link ]

**Alien/Visa Registration Number:** [ ]

**Alien/Visa Expiration Date:** [ ]

\* **Considered to be of Hispanic heritage:**  Yes  No

\* **Considered to be of Haitian Heritage:**  Yes  No

\* **Race - Ethnicity:**

- 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  Participant did not self-identify

[ Verify | Scan | Upload | Link ]

**Category of Disability :**

- No disability
- Physical/Chronic Health Condition
- Physical/Mobility Impairment
- Mental or Psychiatric Disability
- Vision-related disability
- Hearing-related disability
- Learning Disability
- Cognitive/Intellectual disability
- Participant did not disclose type of disability

Check here to allow saving of a partial application

[Exit Wizard](#)

<< Back Next >>

*Demographic Tab for Incumbent Worker*

To complete the tab, minimally, enter and/or verify:

- Date of birth
- Gender
- Selective Service registration status (if applicable)
- Citizenship or Authorization to work in the U.S.
- Heritage and ethnicity questions
- Disability (if they consider themselves to have one)

Click **Next**.

**Note:** *If your site has the Document Management module for documents used in verification, see the topic “, In-Context Scanning, Linking, and Viewing” in Chapter 30 - Manage Documents for details on acquiring document images.*

**Veteran Tab for Incumbent Worker**

Minimally, enter and/or verify the following veteran data:

- If the individual has indicated Transitioning Service Member status.  
If Yes, you must complete type and Estimated Discharge Date.
- If the individual has indicated Eligible Veteran Status. If yes, you must complete and verify information in this section.
- If the individual has NOT indicated veteran status, you must indicate “No” where appropriate for the required questions.
- Click **Next** to save your edits and proceed or click Exit Wizard to save a partial application.

**Note:** For a sample of this tab, see the longer description of the Veteran tab under the topic, “The WIOA Application for Adult”.

### Employment Tab for Incumbent Worker

Use the Employment Information section to verify the individual’s employment status and employment history.

**WIOA Wizard**

Start ✓ Contact ✓ Demographics ✓ Veteran ✓

Employment ⚠ Education ✗ Eligibility and Grants ✗

**Employment Information**

\* **Employment Status:**  [ Verify | Scan | Upload | Link ]  
 Self Attestation

\* **Unemployment Eligibility Status:**

**UI Referred By Status:**  *If a Claimant, you must select the Referred by, and a radio button.*

Yes  No  Unknown

**Claimant has been exempted from work search:**   Today

**Date claimant was exempted from work search:**  Today

**Unemployment Compensation Verify** [ Verify | Scan | Upload | Link ]

*Please enter the Wage and Onet Code for all applicants with current/previous employment.*  
[Search Onet](#)

**Occupation of Most Recent Employment Prior to WIA/WIOA participation (if available):** -

**Employment History**

Company Name	Location	Job Title (Occupation)	Start/End Dates	Action
Geographic Solutions Inc	1001 Omaha Cir Palm Harbor, FL	Programmer (Computer Programmers)	03/12/2017 - present	<a href="#">Edit</a> <a href="#">Delete</a>

[Add Employment History]

Check here to allow saving of a partial application

[Exit Wizard](#)

<< Back      Next >>

*Employment Tab for Incumbent Worker*

At a minimum, under Employment Information:

- Select employment status (and verify, even if No).
- Identify unemployment eligibility status.
- If a Claimant:
  - Select exempted from work search radio button
  - Verify UI compensation

Under Employment History:

- Consider checking any listed employment that displays in the employment history table.
- Click **Next** to save your edits and proceed.

### Education Tab for Incumbent Worker

Use the Education tab to define the individual’s education information related to education for high school equivalency and federally report high school grade completed. The data is organized into two sections: WIOA Educational Information and Education Partner Services.

At a minimum, under WIOA Education Information:

- Select current highest school grade completed.
- Select and/or verify the Highest Grade and Education Level completed.
- Select current school status, if the individual is attending any school (excluding Adult Education), based on a state-specific definition.

Under Education Partner Services:

- Review the defaults “Did not self-identify” radio-button selections, and make changes if any of the services apply.
- Click **Next** to save your edits and proceed.

### WIOA Application – Educational Information Tab for Incumbent Worker

**Note:** For more details on this tab, see the topic “Education Tab” **Error! Reference source not found.**, previous described under “WIOA Application for an Adult”. The tab has the same fields for the Adult Eligibility.

### The Eligibility & Grants Tab for Incumbent Worker

If staff create a WIOA application for Incumbent Worker, with no other application eligibility type for the individual, then the Eligibility Matrix will not indicate program eligibility. Staff will simply see the active radio button in the WIOA Grant Eligibility section, below the matrix (as shown below). There they can select Yes and add a grant.

## Applicant Eligibility

### Meets Low Income:

For the Incumbent Worker application, this indication of whether the applicant meets the definition for low income merely represents an applicant's self-reported status (if applicable).

### Eligibility Matrix:

The eligibility matrix has no indicator for Incumbent Worker. If no other Eligibility Type has an application and Eligibility Date, then Adult, Dislocated Worker, and Youth will all show *Undetermined* (i.e., no green rows will display).

**WIOA Wizard**  
Start Contact Demographics Veteran  
Employment Education Eligibility and Grants

**Applicant Eligibility**  
Applicant meets the definition for low income:  Yes  No

**Income Table:**

Program	Eligible	Priority	Calculated Exception/Limitation	Reason(s) Not Eligible
Adult	Undetermined			No Adult Eligibility Date.
Dislocated Worker	Undetermined-2			No DW Eligibility Date.
Youth	Undetermined-2			No Youth Eligibility Date.

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

**WIOA Grant Eligibility**  
Incumbent Worker Eligibility:  Yes  No  Not Applicable  
Applicant meets the basic requirements for Incumbent Worker eligibility, but staff must manually set add a grant, when appropriate.  
National Dislocated Worker Grant NDWG:  Yes  No  Not Applicable  
Applicant does not meet the requirements for NDWG eligibility.

**Grants**

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Statewide Incumbent Worker (Adult)	21	Incumbent Worker Grant TM	Not Defined	04/27/2017	Remove
Select from the list of available grants.					
Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Statewide Incumbent Worker (Adult)	19	Statewide Incumbent Worker Training	NA		Add

**Staff Eligibility Information**  
Current Case Manager: Case currently Not Assigned to a Case Manager  
Assign Case Manager  
Assign Me  
Comments: [Text Field]  
[Spell Check]  
[Add a new Case Note] [Show Filter Criteria]  
No data found.

Exit Wizard  
Back Next Finish

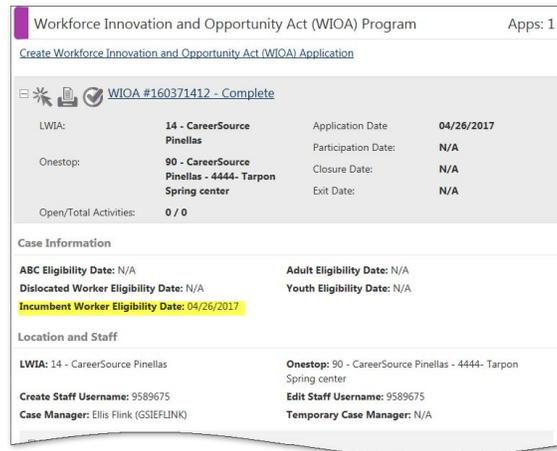
Selecting Yes will enable available Grant IDs for Incumbent Worker.

WIOA Application Eligibility & Grants Tab – for Incumbent Worker Eligibility Type

## WIOA Grant Eligibility

The first radio button under this section is for Incumbent Worker Eligibility. In WIOA, local boards can identify acceptable Incumbent Worker Training (IWT) and reserve up to 20 percent of funds for IWT.

- Click the Yes radio button. This will activate the lines in the Grant section for adding any available State Incumbent Worker Grants.



Workforce Innovation and Opportunity Act (WIOA) Program Apps: 1

Create Workforce Innovation and Opportunity Act (WIOA) Application

WIOA #160371412 - Complete

LWIA:	14 - CareerSource Pinellas	Application Date:	04/26/2017
Onestop:	90 - CareerSource Pinellas - 4444- Tarpon Spring center	Participation Date:	N/A
		Closure Date:	N/A
		Exit Date:	N/A
Open/Total Activities:	0 / 0		

Case Information

ABC Eligibility Date: N/A	Adult Eligibility Date: N/A
Dislocated Worker Eligibility Date: N/A	Youth Eligibility Date: N/A
Incumbent Worker Eligibility Date: 04/26/2017	

Location and Staff

LWIA: 14 - CareerSource Pinellas	Onestop: 90 - CareerSource Pinellas - 4444- Tarpon Spring center
Create Staff Username: 9589675	Edit Staff Username: 9589675
Case Manager: Ellis Flink (GSIEFLINK)	Temporary Case Manager: N/A

*Incumbent Worker Eligibility Case Information Screen*

### Grants

Once types of grants are added to this section, such as the indicated Incumbent Worker Grants, staff can click the Add link to add a related grant (as shown in the figure above).

They can also click a Remove link to remove the grant, if at a later date it no longer applies for the individual.

### Finishing the Application

Staff can click **Finish** or **Next** at the bottom of the screen:

- **Finish** will complete and close the application and return staff to the Programs tab. The Application will display as *Complete* for the WIOA application when staff expands the links for the WIOA application.
- **Next** will complete and close the application and open the first tab for creating an enrollment in WIOA.

**Note:** *Finish will not create the Participation. When staff returns to the Programs tab to enroll the individual in services, they must create a participation record. Next automatically generates the participation record, before it opens Enrollment tabs.*

*See the topic “WIOA Service/Activity Enrollments” for more on the steps for enrollment. See the topic “WIOA Participation Form” if Finish was selected, and the form must be completed before starting enrollments.*

### Seeing WIA Legacy Data on the Eligibility Tab

If the WIOA application was a previous WIA application that was converted, the *WIA Converted Application ID* displays as the last field in the Identifying Info area of the Intro tab. This only displays for records that are converted (i.e., those that have no Exit date OR Exit dates ≥ 7/1/2010). These will also have a “WIA Legacy Data” link on last the Eligibility & Grants tab. From the link, staff can open a separate display of WIA data that is not used in the converted WIOA application. An example of this page is shown in the figure below.

The screenshot displays the WIOA Wizard interface with several tabs and sections:

- Identifying Information:** Username/Login Name: JMONIGE, User ID: 21087317, State ID: 83083145, Create Date: 9/1/2014, Created By Staff: Vieyra, N, Last Edit Date: 9/15/2014, Staff Last Edited: Vieyra, N, User Account Create Date: 2/5/2013, **WIA Converted Application ID: 3242642**.
- Application/Registration Information:** Application Closed Never Enrolled:  Yes  No.
- Applicant Eligibility:** Applicant meets the definition for low income: Yes. Income Table:
 

Program	Eligible
ABC Services	Undetermined
Adult	Yes
Dislocated Worker	Undetermined
Youth	Undetermined
- WIA Grant Eligibility:** National Dislocated Worker Grant ND...
- Grants:** Current Grants table with columns Grant Type and Grant ID. No records found.
- Staff Eligibility Information:** Current Case Manager, Comments, and a table with columns ID, Create Date, and Subject. No data found.
- WIA Legacy Application Data:** A link labeled "WIA Legacy Application Data" with a lightbulb icon.
- WIA Wizard Progress:** Start (Active), Contact, Demographics, Veteran, Employment, Education, Barriers, Eligibility and Grants.
- WIA Wizard Progress (Detailed):** Start, Contact, Demographics, Veteran, Employment, Education, Public Assistance, Barriers, Income Worksheet, Family Income, Miscellaneous, Eligibility and Grants.
- WIA Legacy Page:** You are in VIEW mode. WIA Dates: WIA Application Type: Not Specified, Core Eligibility Date: 9/1/2014, WIA Intensive/Youth Date: 9/1/2014. WIA Dislocated Worker: Received a termination or layoff notice from last job or, if still Not Specified employed, current job or are you a Displaced Homemaker: Not Specified. WIA Statewide Displaced Homemaker Adult Eligibility: Not Specified. WIA Statewide Displaced Homemaker Adult Eligibility Inactive: Not Specified. WIA Statewide Displaced Homemaker Adult Eligibility Verify: None Selected. WIA Statewide Displaced Homemaker Dislocated Worker Eligibility: Not Specified. WIA Statewide Displaced Homemaker Dislocated Worker Eligibility Inactive: Not Specified. Eligible SW DH Dislocated Worker Indicator: Not Specified. WIA Barriers: WIA Out of School Youth at time of application - Meets definition for WIA: Not Specified. Age of Consent: Not Specified. WIA Below School Age Verify: Not Specified. WIA Below School Age Verify - Other: Not Specified. Limited English: Not Specified. Single Parent Indicator: Not Specified. Youth Facing Serious Barriers: Not Specified. Youth Facing Serious Barriers Verify: None Selected. Youth Facing Serious Barriers Verify - Other: Not Specified. Youth Requires Additional Assistance: Not Specified. Youth Facing Serious Barrier Questions: Answers To Youth Barriers Questions. No Configured Questions: No Applicable Answers.

**Annotations:**

- Green text: "When a WIA Converted App ID shows on the Start tab..."
- Green text: "... There is a WIA Legacy Data link at the bottom of the Eligibility tab..."
- Green text: "... Which opens a separate display window, with all the WIA Legacy Data not in the new WIOA Application tabs."

The WIA Converted Application ID – and the WIA Legacy Application Data Screen

## Printing the WIOA Application

From the moment staff completes the first step (the Intro tab) for a WIOA application, the icons next to the Application link, on the Programs tab, will include a Print button, along with the with the wizard and the verification buttons.

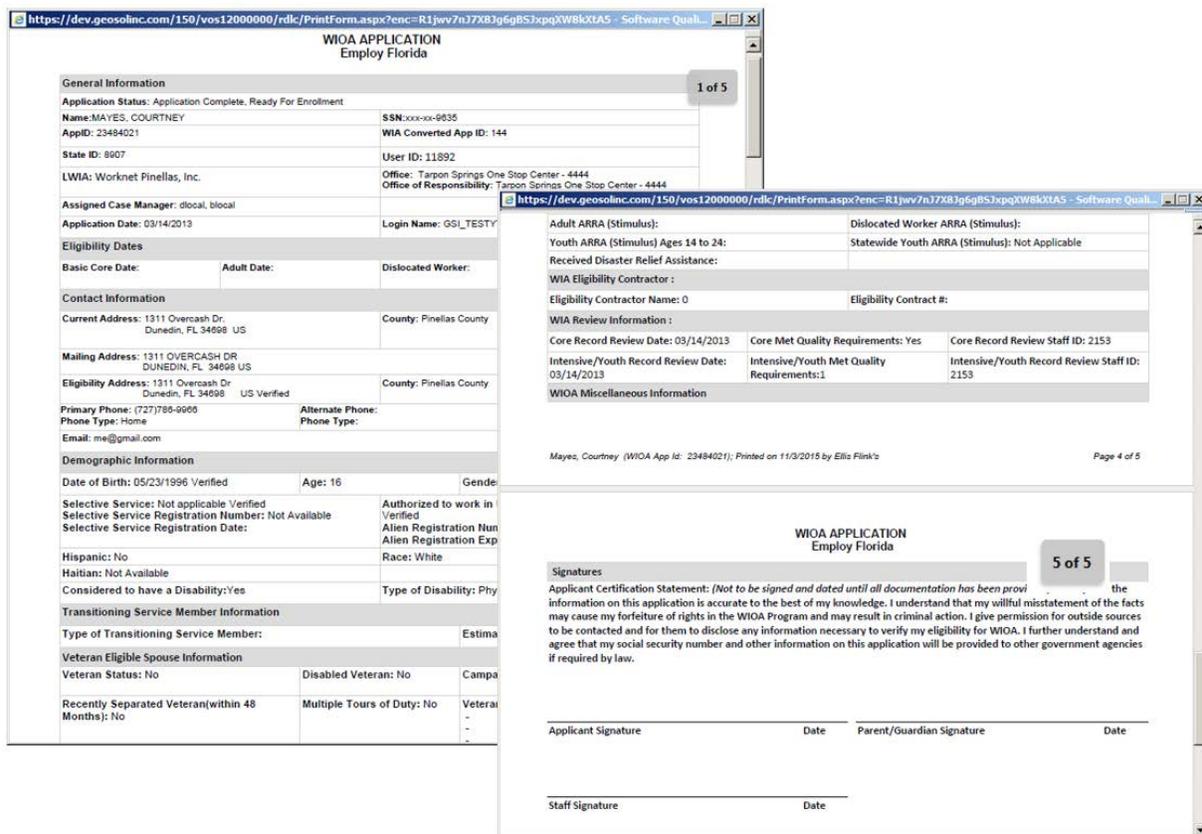
Staff can print the full application or print only the application eligibility sections, at any point.

When staff selects the Print button to print the application, the system will display a separate window to choose printing of a *Full Application* or an *Eligibility Only Application*.



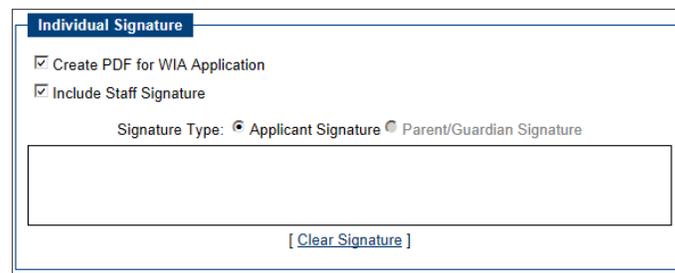
*Printing an Application is Available from a link on the Programs tab*

After the selection is made, the separate window will resize and display a printable WIOA application form, as a full, printable PDF copy of the application, with areas at the bottom for appropriate signatures (as shown below).



*Printable PDF Copy of WIOA Application (Eligibility Only Application)*

**Note:** For systems configured to include the digital signature pad, the bottom of the screen from which staff can print the WIOA application will include an area for the Individual Signature.



### *Individual Signature Area*

*The keypad will allow an individual applicant to sign, and staff can identify if their staff signature is included, as well as whether the WIOA Application (with signatures) is only printed or is saved with the signature as part of the created PDF for the WIOA application. Staff can check a box to include their staff signature (if they have already saved their signature from their My Staff Account page).*

## ***WIOA Participation Form***

Staff must complete a program participation form before registering the individual in their initial program activity. The participation form provides details of the participant's status before enrolling in the program and ultimately offers a "before and after" starting point for Common Measures reporting.

If staff clicked **Next** as the final action in the application, the system automatically generates a participation record and opens the Enrollment tab. If they clicked **Finish**, staff must create a Participation record before they can enroll the individual in services.

### **► To create a Participation record:**

- Click the [Create Participation](#) link on the Programs tab.

The system displays a screen similar to the following figure:

**General Information**

**Staff User Add:** GSIEFLINK

**State ID:** 9181

**Name:** Joe Singer

**Application Date:** 05/15/2017

**Earliest Eligibility Date:** 05/15/2017

**Participation Information**

**\* Participation Date:**

**Date of Birth:** 01/01/1955

**Age at Participation:** 62

**\* Employment Status at Participation:**

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

✓ Self Attestation

**\* UC/UI Status:**

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

**School Status at Participation:** In-school; post Secondary School

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

✓ School records

If the status displayed from the application is not the current status, please check the box below (requires privileges) or update the application record.

Update Application School Status

**Out-of-School Youth:** Not Applicable

**Individual Signature**

Create PDF

Include Staff Signature

[Applicant Signature](#)

---

*WIOA Participation Form*

- Review the pre-filled data
- Make any required selections or verifications.
- Click **Next**.
- The system will display a WIOA Registration/Activity (“Enrollment”) Record form. (See the next topic.)

**Note:** *Most of the required data on this form is pre-filled, based on previously entered information. Enter the individual’s participation date using either the calendar icon or free-text entry. Be sure to use the proper date format, as shown in the sample blue text. This date becomes locked down upon save, so the date entered should represent the participant’s initial activity service that you will manually enter in the next step.*

## **WIOA Service/Activity Enrollments**

Upon successfully completing the WIOA Participation Record, if staff clicks the **Next** button, a participation record is automatically generated, and the system opens to the first screen/tab of the Enrollment tabs (shown below).

To start a new WIOA activity or service (after the application and participation are completed), staff clicks the Create Activity link (below the link for the WIOA Participation record).

Eligibility Summary

Participation 03/25/2016

[Edit Participation](#)

Participation Date: 03/25/2016

School Status: Not attending school: Secondary School Graduate or has a recognized equivalent Employment Status: Not Employed

Activities / Enrollments / Services

[Create Activity / Service / Enrollment](#)

*Create Activity Link*

Regardless of how the creation of an activity is started, it will display the first tab of the WIOA Enrollment form, which is the General Information tab.

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

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

**General Information**

Participant User Name: GSIQATMADL032516  
Participant State ID: 1266308  
Last Name, First Name MI: Tester, TerriBerri  
Social Security Number: 1384  
Address: 2368 Pinelane Lane, Nashville, TN 37201  
Application Summary: Program:WIOA, Application Date:3/25/2016, Earliest Eligibility Date:03/25/2016  
Participation Date: 03/25/2016  
\* Customer Program Group: 10B - Adult - Individualized Services/Training  
\* LWIA Region: Middle TN Career Coach  
\* Office Location: Middle TN Career Coach

**Enrollment Information**

Participant selected an ITA and the ITA will pay for this service: None Selected

**Staff Information**

Staff ID: GSIUMARKS  
\* Position: Staff  
Current Case Manager: Group: WIOA Theresa, Case Manager: LocalStaff, Theresa, Temporary Case Manager: Not Applicable  
[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)  
Previous Case Manager:  
Comments:  
Case Notes: [Add a new Case Note](#) | [Show Filter Criteria](#)

ID	Create Date	Subject	Action
No data found.			

[Next >>](#)

[Exit Wizard](#)

**Many basic careers services and individualized services do not require funding. Four tabs will not require input for those services.**

*WIOA Enrollment Form (Multiple Tabs)*

The Activity/Enrollment form is a series of tabs used to supply details of each activity in the WIOA participant's service record. It is opened for each single service/activity that is created, and it always displays seven tabs to enter/maintain the enrollment data (including areas for general, service provider, cost, financial aid, budget, and closure data).

For basic *non-fundable* services (services that do not require identification of funding and budget streams), some tabs will not apply and can be skipped. For careers services, particularly for individualized services that require funding streams, all tabs will apply, and approved service providers will be associated with selections in certain tabs.

The following subsections cover the steps of enrollment for three different example activities:

- An Initial Assessment (Non-Fundable)
- A Support Service (Transportation Assistance, Fundable)
- An Occupation Skills Training Activity (Fundable via Approved Provider for ITA)

Steps in the topics that follow indicate how to enroll an individual in each of these activities/services.

Once an activity/enrollment is entered, the service is displayed in a table below the WIOA Activity link. The table includes completion status, begin and end dates, and links to view/modify the existing activity.

[Create Activity](#)

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	<a href="#">102 - Initial Assessment</a> Piedmont Triad Regional Council		Adult	10/21/15	10/21/15	10/21/15	<a href="#">10/13/15</a> Successful Completion
	<a href="#">181 - Supportive Service - Transportation Assistance**</a> ALBEMARLE COMMISSION		Adult	11/04/15	11/04/15	05/30/16	<a href="#">10/19/15</a> Successful Completion
	<a href="#">300 - Occupational Skills Training - Approved Provider List (ITA)</a> College of the Albemarle		Adult	11/04/15	11/04/15	05/30/16	<a href="#">Close</a>

WIOA Activity Table

The activity record can be entered or maintained while the individual progresses through completion of the activity. Until the activity has an actual end date and is closed (e.g., a successful completion), staff can click the wizard icon, , for any activity in the Activity table, to reopen the enrollment tabs and adjust the status for that activity.

## Creating a Non-Fundable Activity - Initial Assessment

Enrolling an individual in a simple non-fundable activity, such as an Initial Assessment, will normally involve entry in only three of the seven tabs of the Enrollment Wizard.

### ► To enroll an individual in an Initial Assessment

- Click the [Create Activity](#) link (below Participation on the Programs tab).

#### On the General Information tab:

- Select the appropriate customer program group.  
Choices displayed result from program eligibility determined during the WIOA application process.
- Select the staff member region, if applicable.

*WIOA Activity Enrollment Form – General Info Tab (Youth, Objective Assessment Example)*

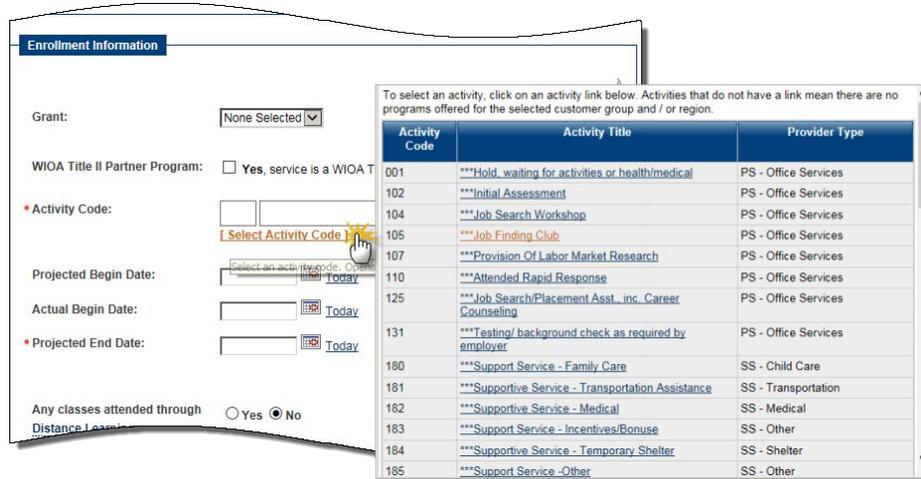
- Select the staff member one-stop office, if applicable.
- In the Enrollment Information area:
  - Select the appropriate grant code, if applicable.  
The displayed values result from the Statewide Program Eligibility Information section and the NEG/SAA/Statewide Grants section of the WIOA Application.
  - Select whether this activity service falls under a Partner Program.  
If Yes, the page will refresh with a drop-down list for Select Partner. Select from the drop-down list to identify a desired program name (as shown below).

**Note:** *Partner Program agencies fund activity services; therefore, no fund tracking will occur in the system.*

*Partner Program Drop-Down List*

- Click [Select Activity Code](#) and choose the desired program or service from the list displayed.

**Note:** The system relies on critical data relationships (customer program group, LWIA, provider type) to determine which service activities staff may select – see the sample on the previous page, and the same below, which indicate the range of services that may be shown. Depending on the WIOA Application type, and the location of staff and general information, such as LWIA region, the system will determine which services may be displayed. If no providers and/or programs exist for a particular activity service code, its name will NOT display as a hot link and may not be selected for WIOA enrollment purposes.



The screenshot shows the 'Enrollment Information' form. The 'Grant' dropdown is set to 'None Selected'. The 'WIOA Title II Partner Program' checkbox is unchecked. The 'Activity Code' field is empty, with a 'Select Activity Code' button next to it. The 'Projected Begin Date' and 'Actual Begin Date' are both set to 'Today'. The 'Projected End Date' is also set to 'Today'. At the bottom, there is a radio button for 'Any classes attended through Distance Learning' with 'No' selected.

Overlaid on the form is a table titled 'To select an activity, click on an activity link below. Activities that do not have a link mean there are no programs offered for the selected customer group and / or region.' The table has three columns: Activity Code, Activity Title, and Provider Type.

Activity Code	Activity Title	Provider Type
001	***Hold_waiting_for_activities_or_health/medical	PS - Office Services
102	***Initial Assessment	PS - Office Services
104	***Job Search Workshop	PS - Office Services
105	***Job Finding Club	PS - Office Services
107	***Provision Of Labor Market Research	PS - Office Services
110	***Attended Rapid Response	PS - Office Services
125	***Job Search/Placement Asst. inc. Career Counseling	PS - Office Services
131	***Testing/ background check as required by employer	PS - Office Services
180	***Supportive Service - Family Care	SS - Child Care
181	***Supportive Service - Transportation Assistance	SS - Transportation
182	***Supportive Service - Medical	SS - Medical
183	***Supportive Service - Incentives/Bonuse	SS - Other
184	***Supportive Service - Temporary Shelter	SS - Shelter
185	***Support Service -Other	SS - Other

Sample Activity Code List (for Customer Group and/or Region)

- Record the activity's *Actual Start Date* or *Projected (future) Start Date*.
- Record the activity's *Projected End Date*.
- In the Staff Information area:
  - Select the staff member position, if applicable.
  - To perform case assignment, click Assign Staff, Assign Group, or Assign Me.
  - Type comments, if necessary.
- Click **Next** to save the information and proceed to the next page.

**Note:** If you click [Exit Wizard](#), all changes will be lost (including the WIOA Participation Record, if this is the first WIOA enrollment activity).

From the Service Provider Information tab that displays:

- Click [Select Provider](#) to choose the appropriate service provider.
- Click [Select Service, Course, or Contract](#) to define the selected activity.
- Click [Select Provider Locations](#) to record where the individual will be serviced.
- Click [Select Provider Contacts](#) to record the contact person associated with the activity service/course.

**Enrollment Service Provider Information**

Enrollment Summary: Enrollment ID: 2435060  
Username: JOSH123  
WIOA Application ID: 16205065  
Youth Funding: In-School Youth  
Activity Code: 102  
Activity Dates: 11/21/2015 - 11/30/2015

\* Provider: [Select Provider]

\* Service, Course or Contract: [Select Service, Course or Contract]

Provider Locations: [Select Provider Locations]

Provider Contacts: [Select Provider Contacts]

\* Occupational Training Code: Not Applicable

Provider Code	Provider Name	Address	Programs Available
2	(GSI) WorkNet Pinellas One-Stop Office	5350 Any St Palm Harbor, FL 34683	2
1	Florida Department of Natural Resources, Wildlife Division	19111 Vista Bay Drive Palm Harbor, FL 34683	1
128	Florida OneStop Provider	2323 Nirwana Port St Lucie, FL 34689	1
9	Florida Onestop Service Provider	12345 Any St Any City, FL 33139	2
95	Pace	1001 Omaha Circle Palm Harbor, FL 34683	2
134	WFPlus Office	1212 Wisconsin Tallahassee, FL 32302	4

ID	Service, Course or Contract Name	Program Type	Locations
16141	101 Orientation	Program Services	0
16142	102 Initial Assessment	Program Services	0
16143	205 Develop Service Strategies (IEP/ISS)	Program Services	0

<< Back   Next >>

WIOA Activity Enrollment Form – Service Provider Tab

- Click **Next** to save the information and proceed to the next page.

When WIOA Career Services do not require funding, the system will skip past the Enrollment Cost, Financial Aid, Enrollment Budget, and Budget Planning tabs. The system is intuitive and, based on the properties entered for each service code, will skip over enrollment tabs that are based solely on funding.

With no funding required, the system progress directly to the Closure Information tab (the final enrollment tab). The Closure Information tab looks similar to the following example.

General Information	Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information								
<b>Closure Information</b>														
Enrollment Summary:		Enrollment ID: 2435060 Username: JOSH123 WIOA Application ID: 16205065 Youth Funding: In-School Youth Activity Code: 102 Activity Dates: 11/21/2015 - 11/30/2015												
Last Activity Date:		<input type="text"/> <input type="button" value="Today"/>												
Completion Code:		<input type="text" value="None Selected"/>												
Received Credential:		Not Applicable.												
School Status on Last Day of Service:		<input type="text" value="None Selected"/>												
School Status Verification:		<a href="#">[ Verify ]</a> <a href="#">[ Scan ]</a> <a href="#">[ Upload ]</a> <a href="#">[ Link ]</a> <a href="#">[ View ]</a>												
Case Notes:		<a href="#">[ Add a new Case Note ]</a> <a href="#">[ Show Filter Criteria ]</a>												
		<table border="1"> <thead> <tr> <th>ID</th> <th>Create Date</th> <th>Subject</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td colspan="4">No data found.</td> </tr> </tbody> </table>					ID	Create Date	Subject	Action	No data found.			
ID	Create Date	Subject	Action											
No data found.														
<b>Credential History</b>														
Education/Credential History:														
		<input type="button" value="Back"/> <input type="button" value="Finish"/> <input type="button" value="Delete"/>												
<a href="#">Exit Wizard</a>		<a href="#">Finish and Start a New Activity</a>												

*Closure Information Tab*

If closure information is available, staff can enter a Last Activity Date and a Completion Code. If the service has not ended or closure information is not available, staff can click the **Finish** button.

**Note:** If several services are *being entered*, staff can also click the [Finish and Start a New Enrollment link](#) at the bottom of the page, which will take staff back to the General Information tab. If information must be changed, staff can click the Back button to return to a previous tab.

When staff clicks the **Finish** button, the system re-displays the Programs tab screen (as shown in the figure below) with a WIOA Registration/Activity Record table that lists the first enrollment activity.

**Note:** *In this example, the individual is officially a WIOA customer because they have their first WIOA activity service with a definitive start and end date.*



Updated Programs Tab Screen

Staff may perform the following tasks from this screen:

- Click Create Activity to record additional enrollment activity. Staff may continue to create core WIOA activities until they complete the WIOA Intensive/Training Application. For details on the intensive application, see the next topic.
- Click the Activity/Provider link to access the long view format for activity details.
- Click the edit wizard icon to access the wizard view format for activity details.
- Click the Close link to officially close the activity service.

## Creating a Fundable Activity - Support Service

Although not all support services require funding, most support services are fundable; therefore, they will include active funding tabs that staff can use to record any costs and budgeting data for the funded service (including Enrollment Cost, Financial Aid, Enrollment Budget, and Budget Plan tabs). The support services and service providers available to staff are dependent on the LWIA as well as the customer program group selected. The support services can be of two types: Fee based and Unit based. The following example describes enrolling an individual in a fundable unit-based support service, (in this example, Transportation Assistance).

### ► To enroll an individual in a Support Service

- Click the Create Activity link (below Participation on the Programs tab).

#### General Information tab:

- Select the appropriate customer program group.  
Choices displayed result from program eligibility determined during the WIOA application process.
- Select the staff member region, if applicable.

The screenshot shows the 'WIOA Activity Enrollment Form - General Info Tab (Transportation Assistance Example)'. The form is divided into several sections:

- General Information:** Includes fields for Participant User Name (GSIOAHEARN522), Participant State ID (59), Last Name, First Name MI (Hearn, Charlotte), Social Security Number (1105), and Address (123 Main Street, Greensboro, NC). It also includes an Application Summary with Program (WIOA), Application Date, and Earliest Eligibility.
- Enrollment Information:** Includes Grant (None Selected) and WIOA Title II Partner Program (Yes, service is...).
- Staff Information:** Includes Staff ID (GSISA0), Position (Staff), and Case Manager.
- Case Notes:** Includes a table for adding case notes with columns for ID, Create Date, Subject, and Action.

A blue arrow points to the 'Select Activity Code' link in the General Information section, which is linked to a table of activity codes:

Activity Code	Activity Title	Provider Type
001	Waiting for activities or health/medical	PS - Office Services
101	Orientation	PS - Office Services
102	Initial Assessment	PS - Office Services
103	Information On Training Providers_Performance Outcome	PS - Office Services
104	Workshop	PS - Office Services
105	Job Finding Club	PS - Office Services
115	Resume Preparation Assistance	PS - Office Services
151	Skill Advancement for Employment	PS - Office Services
125	Job Search/Placement Asst. inc. Career Counseling	PS - Office Services
131	Testing/background check as required by employer**	PS - Office Services
180	Support Service - Child/Dependent Care**	SS - Child Care
181	Supportive Service - Transportation Assistance**	SS - Transportation
184	Supportive Service - Temporary Shelter**	SS - Shelter
185	Supportive Service - Other**	SS - Other

*WIOA Activity Enrollment Form – General Info Tab (Transportation Assistance Example)*

- Select the staff member one-stop office, if applicable.
- If applicable, select an appropriate grant code.

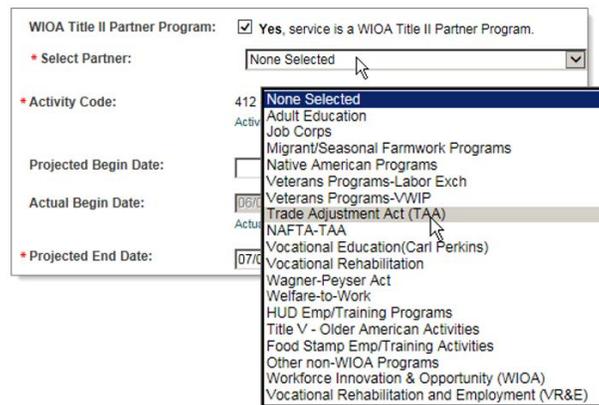
\* Grant:

- None Selected
- 465 - Natl DWT NEG
- DW Suppl Funding RR
- Apr15 - DWT Training Grant

*Grant Drop-Down List*

**Note:** The displayed values result from identified Grant eligibilities in Grant sections of the Eligibility & Grants tab, at the end of the WIOA application. For example, specific grant selections for Statewide Adult Eligibility or National Dislocated Worker Grant (NDWG) on the last WIOA Application, will display those grant codes in the Grant drop-down list.

- If this activity service falls under a Partner Program, check the **Yes** box for Select Partner. This displays a drop-down list. Select the partner program (as shown below).



*Partner Program Drop-Down List*

**Note:** Selected Partner Program agencies fund activity services; therefore, no fund tracking will occur in the system for these services.

- Click Select Activity Code and choose the desired program or service from the list displayed.

**Note:** The system relies on critical data relationships (customer program group, LWIA, provider type) to determine which service activities staff may select – see the sample, on the previous page, and the same below, which indicate the range of services that may be shown.). Depending on the WIOA Application type, and the location of staff and general information, such as LWIA region, the system will determine which services may be displayed. If no providers and/or programs exist for a particular activity service code, its name will NOT display as a hot link and may not be selected for WIOA enrollment purposes.

- Record the activity's *Actual Start Date* or *Projected* (future) *Start Date*.
- Record the activity's *Projected End Date*.
- In the Staff Information area:
  - Select the staff member position, if applicable.
  - To perform case assignment, click Assign Staff, Assign Group, or Assign Me.
  - Type comments, if necessary.
- Click **Next** to save the information and proceed to the next tab.

**Note:** If you click Exit Wizard, all changes will be lost (including the WIOA Participation Record, if this is the first WIOA enrollment activity).

**Service Provider tab:**

From the Service Provider Information tab that displays:

- Click Select Provider to choose the appropriate service provider.
- Click Select Service, Course, or Contract to define the selected activity.
- Click Select Provider Locations to record where the individual will be serviced.
- Click Select Provider Contacts to record the contact person associated with the activity service/course.

Provider Code	Provider Name	Address	Programs Available
94	Best Trainers	1 Main St Raleigh, NC 27607	1
37	Capital Area Local Provider	4234 Main Street Raleigh, NC 27608	1
125	NCWorks Career Center - Cabarrus County	2275 Kannapolis Hwy Concord, NC 28027	1
6	North Carolina Satellite Services	1216 Raleigh Blvd Raleigh, NC 27604	1
134	Raleigh Good Will	1612 Almaden Raleigh, NC 27615	1
13	Salisbury Community College	1214 Mont Blanc Salisbury, NC 28145	1

ID	Service, Course or Contract Name	Program Type	Locations
16141	101 Orientation	Program Services	0
16142	102 Initial Assessment	Program Services	0
16143	205 Transportation Assistance Gas Cards	Program Services	0

WIOA Activity Enrollment Form – Service Provider Tab

- Click **Next** to save the information and proceed to the next tab/page.

**Enrollment Cost tab:**

When a Support Service requires funding, the Enrollment Cost tab opens next. If it has a pre-determined fee based or unit based service costs, they display as starting costs on the tab. For Unit Based Service Costs (as in the following example), staff can change the Unit Cost and add the number of units.

**181 - Supportive Service - Transportation Assistance\*\***  
Salisbury Community College  
Transportation Assistance Gas Cards

Enrollment Summary: Enrollment ID: 8774  
Username: GSIRALEIGH  
WIOA Application ID: 49009  
Activity Code: 181  
Activity Dates: 11/23/2015 - 11/28/2015

\$11,375.00 Total costs are itemized below.

Total Support Service Costs - **Unit Based** \$11,375.00  
Available: \$11,375.00  
Obligated: \$0.00

Unit Cost \$ 25.00  
# Units 455  
Available: 455.00  
Obligated: 0.00

**For Support Services, the tab will indicate whether it is Unit Based or Fee Based.**

Additional Costs  
These optional fields are used to record additional expenses related to the service.

This enrollment currently has no line items.

Select an item from the list and then click on the Add button to add the selected Line Item.

Line Items Other/Misc. Support Cost Add

Total Enrollment Cost **\$11,375.00**

WIOA Enrollment Form, Enrollment Cost Tab with Line Item Costs

- Review the *Unit Cost* and the *# of Units* values, and make any needed changes.

- Click the **Add** button to add other support costs, if needed.

This lets you pick a line item type, and then add a separate line item cost for the item needed, which is added in the “Additional Costs” area at the bottom of the page.

The **Add** button lets staff enter additional miscellaneous support costs beyond the units and unit cost, in an additional area for additional cost entry as shown below, and adds the entry to the Total Enrollment Cost.

*Enrollment Cost Tab, Additional Costs Line Item Control*

- Click **Next** to save the costs and any changes and proceed to the Financial Aid tab.

**Financial Aid tab:**

- If any financial aid applies, related to the cost for support services, click **Yes** at the top of the tab. This expands the tab to show the current planned cost and includes a link to add financial aid.
- Click the link [To Add Financial Aid](#). This will open a dialog box from which you can select the type of Financial Aid.
- Select the type of financial aid from the list. An additional Financial Aid contribution area will display (as shown below).

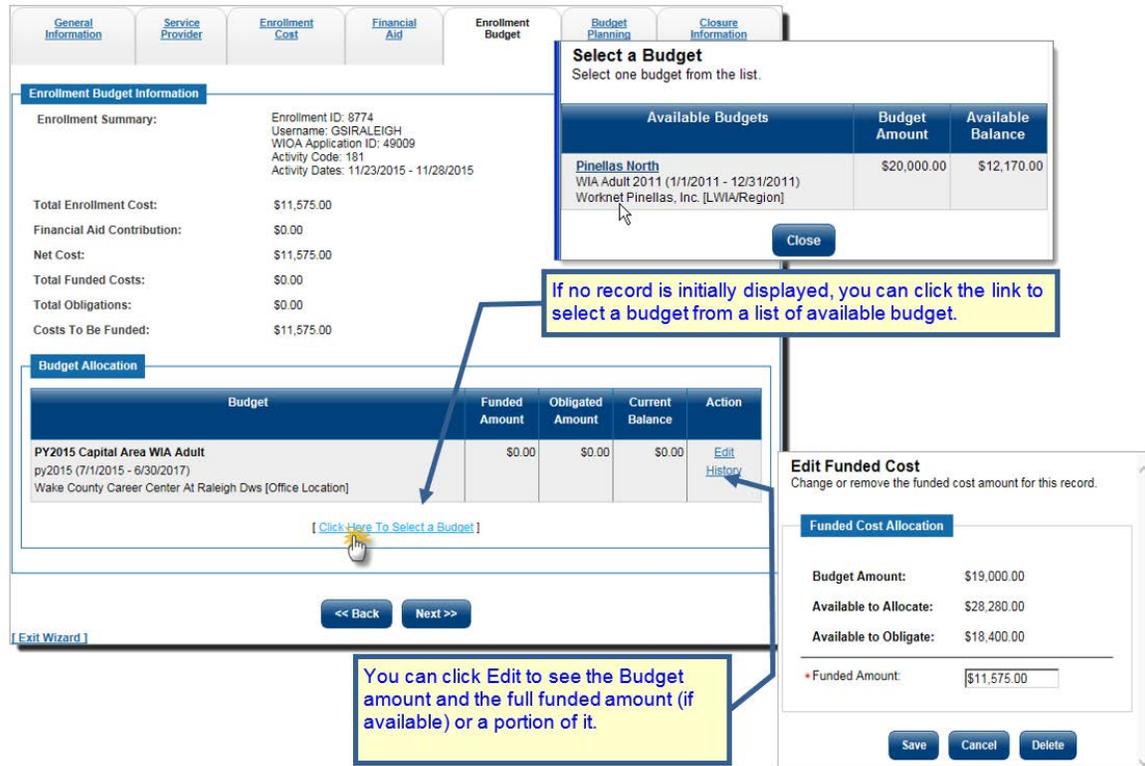
*WIOA Enrollment Financial Aid Screen, Adding Financial Aid*

**Note:** Staff click the Calculate link to compute the amount of financial aid applicable, as shown in the screen sample above. The system automatically recalculates the new planning cost based on these staff actions.

- Click **Next** to save any changes and proceed (to the Enrollment Budget tab).

**Enrollment Budget tab:**

- From the Enrollment Budget tab, staff click the [Click Here to Select a Budget](#) link. The system will display all applicable fund streams based on the following: *LWIA, customer program group, activity code, service dates, service costs, or fund stream setup.*
- Click the desired *Item* link, as shown in the figure below, to select a budget.
- Then click the Edit link to see the current funded cost allocations for the selected budget, and enter the “Funded Amount.” This will usually be the total service cost, if such funding is available.



The screenshot shows the 'Enrollment Budget' tab with several sections:

- Enrollment Budget Information:** Enrollment ID: 8774, Username: GSIRALEIGH, WIOA Application ID: 49009, Activity Code: 181, Activity Dates: 11/23/2015 - 11/28/2015. Total Enrollment Cost: \$11,575.00, Net Cost: \$11,575.00, Total Funded Costs: \$0.00, Total Obligations: \$0.00, Costs To Be Funded: \$11,575.00.
- Budget Allocation:** A table with columns: Budget, Funded Amount, Obligated Amount, Current Balance, Action. One row is visible: PY2015 Capital Area WIA Adult (py2015 (7/1/2015 - 6/30/2017) Wake County Career Center At Raleigh Dws [Office Location]).
- Pop-up: Select a Budget:** Shows a list of available budgets. One budget is highlighted: Pinellas North (WIA Adult 2011 (1/1/2011 - 12/31/2011) Worknet Pinellas, Inc. [LWIA/Region]) with a Budget Amount of \$20,000.00 and Available Balance of \$12,170.00.
- Pop-up: Edit Funded Cost:** Shows 'Funded Cost Allocation' with Budget Amount: \$19,000.00, Available to Allocate: \$28,280.00, Available to Obligate: \$18,400.00, and a 'Funded Amount' field containing \$11,575.00.

Callouts in the image provide instructions: 'If no record is initially displayed, you can click the link to select a budget from a list of available budget.' and 'You can click Edit to see the Budget amount and the full funded amount (if available) or a portion of it.'

*WIOA Enrollment Budget Information, Selecting a Budget*

- Click **Next** to save the changes and proceed to the Enrollment Budget tab.

**Budget Planning tab:**

The Budget Planning tab displays enrollment cost summary information, based on data entry in the preceding tabs. It may also be used to create a voucher for funded amounts, depending on the provider and associated budget planning or contracts.

General Information	Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information
<b>Budget Plan Information</b>						
Enrollment Summary:		Enrollment ID: 8774 Username: GSIRALEIGH WIOA Application ID: 49009 Activity Code: 181 Activity Dates: 11/23/2015 - 11/28/2015				
Total Funded Costs:		\$11,575.00				
Total Obligations:		\$0.00				
Total Paid Obligations:		\$0.00				
Total Outstanding Obligations:		\$0.00				
Total Funded Costs to be Obligated:		\$11,575.00				
[+] Show Filter Criteria (Showing all records)						
<b>PY2015 Capital Area WIA Adult : py2015 (7/1/2015 - 6/30/2017)</b>						
Budget Location: Wake County Career Center At Raleigh Dws [Office Location]						
Funded Amount: \$11,575.00		Obligated Amount: \$0.00		Current Balance: \$11,575.00		
Total Payments: \$0.00		Total Refunds: \$0.00		Total Paid: \$0.00		
[ Add a Voucher ]						
You have no records						
<input style="border: none; background-color: #4F81BD; color: white; padding: 2px 10px;" type="button" value=" &lt;&lt; Back "/> <input style="border: none; background-color: #4F81BD; color: white; padding: 2px 10px;" type="button" value=" Next &gt;&gt; "/>						

*WIOA Enrollment Form – Enrollment Budget Plan Tab*

- Staff can enter allocated amounts for this service, or accept the defaults, and click **Next**. The system will display the Closure Information tab last.

**Note:** *The system may display a confirmation window when it successfully allocates the service amount. If so, the system calculates new planned amounts when staff members click **Next** from the confirmation.*

*Depending on the type of service, the Staff may create a voucher at a later time. See the Individual Fund Tracking User Guide for details on adding a voucher.*

**Closure Information tab:**

From the Closure Information tab, staff can:

- Enter a Last Activity Date.
- Enter a Completion Code.
- Enter an optional Case Note.

General Information	Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information								
<b>Closure Information</b>														
Enrollment Summary:		Enrollment ID: 8774 Username: GSIRALEIGH WIOA Application ID: 49009 Activity Code: 181 Activity Dates: 11/23/2015 - 11/23/2015												
Last Activity Date:		10/27/2015  Today You do not have sufficient privileges to modify this field.												
Completion Code:		Successful Completion <input type="text"/> Completion Status cannot be modified.												
Received Credential:		Not Applicable.												
Case Notes:		<a href="#">Add a new Case Note</a>   <a href="#">Show Filter Criteria</a>												
		<table border="1"> <thead> <tr> <th>ID</th> <th>Create Date</th> <th>Subject</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td colspan="4">No data found.</td> </tr> </tbody> </table>					ID	Create Date	Subject	Action	No data found.			
ID	Create Date	Subject	Action											
No data found.														
<b>Credential History</b>														
Education/Credential History:														
		<input data-bbox="678 968 766 997" type="button" value=" &lt;&lt; Back "/> <input data-bbox="781 968 857 997" type="button" value=" Finish "/> <input data-bbox="872 968 948 997" type="button" value=" Delete "/>			<a href="#">Finish and Start a New Activity</a>									
<a href="#">Exit Wizard</a>														

Closure Information Tab

- Click **Finish**.

**Note:** If the service has not ended or closure information is not available, staff can click the **Finish** button. However, if the service has ended, and several services are being entered, staff can also click the Finish and Start a New Activity link at the bottom of the page, which will take staff back to the General Information tab for another activity.

If information must be changed, staff can click the **Back** button to return to a previous tab.

When staff clicks the **Finish** button, the system re-displays the Programs tab screen (as shown in the figure below) with a WIOA Registration/Activity Record table that lists the first enrollment activity.

**Create Workforce Innovation and Opportunity Act (WIOA) Program**

Workforce Innovation and Opportunity Act (WIOA) Program #4345655. App Date 10/9/2015. Adult Eligibility(LI) 10/9/2015.  
 LWIA 47 (Complete) | [WIOA Test Harness](#)  
 Case Manager: Rosario, Sandra  
 Temp Assigned: None Assigned

[Create Participation](#)

[Edit Participation for WIOA #4345655 Participation Date 10/9/2015](#)

[Create Activity](#)

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
C	<a href="#">101 - Orientation</a> Piedmont Triad Regional Council	W	Adult	10/09/15	10/09/15	10/09/15	10/09/15 Successful Completion
C Fundable Activity	<a href="#">181 - Supportive Service - Transportation Assistance**</a> Salisbury Community College	W	Adult	10/27/15	10/27/15	10/27/15	10/27/15 Successful Completion
O Fundable Activity	<a href="#">300 - Occupational Skills Training - Approved Provider List (ITA)</a>	W	Adult	11/06/15	11/06/15	12/11/15	<a href="#">Close</a>

[Create Closure](#)

[Create Outcome](#)

Updated Programs Tab Screen

Staff may perform the following tasks from this screen:

- Click [Create Activity](#) to record an additional enrollment activity. Staff may continue to create WIOA activities until they complete the WIOA Application, including individualized training activities. For details of the enrollment in these training services, also see the next topic.
- Click the edit wizard icon  to access the wizard view format for activity details.
- Click the [Close](#) link to officially close the activity service.

### Creating a Fundable Activity - Individualized Training Account - ITA Service

ITA services normally require funding, and they will include the active funding tabs (i.e., Enrollment Cost, Financial Aid, Enrollment Budget, and Budget Plan tabs). These fundable services and service providers available to staff are dependent on the LWIA as well as the customer program group selected. The cost areas for ITA services are similar to fee-based support services in how different lines for cost are displayed for staff to enter separate costs such as books, labs, or other fees. The following example describes enrolling an individual in a fundable ITA service (in this example, Occupational Skills Training - Approved Provider for ITA).

► **To enroll an individual in a Fundable ITA Service:**

- Click the [Create Activity](#) link (below Participation on the Programs tab).  
The system displays the General Information tab, a sample of which follows:

**General Information tab:**

- Select the appropriate customer program group.  
Choices displayed result from program eligibility determined during the WIOA application process.
- Select the LWIA region and the office location, as applicable.

**Note:** *If Agency Codes apply to your system, enter your agency code. This is not a required field.*

WIOA Activity Enrollment Form – General Info Tab (Occupation Skills Training – Approved Provider Example)

- If applicable, select an appropriate grant code.

\* Grant:

Grant Drop-Down List

**Note:** The displayed values result from the selected Customer Group and related Grant eligibilities defined in sections of the Eligibility & Grants tab at the end of the WIOA application. For example, specific grants identified as available for Statewide Dislocated NEG Eligibility on the last Application tab will display those grant codes in the Grant drop-down list (as shown above).

- If this activity service falls under a Partner Program, check the **Yes** box for Select Partner. This displays a drop-down list. Select the partner program (as shown below).

WIOA Title II Partner Program:  Yes, service is a WIOA Title II Partner Program.

\* Select Partner:

\* Activity Code: 412

Projected Begin Date:

Actual Begin Date:

\* Projected End Date:

Provider Code	Provider Name	Address	Programs Available
94	Best Trainers	1 Main St Raleigh, NC 27607	1
37	Capital Area Local Provider	4234 Main Street Raleigh, NC 27608	1
125	NCWorks Career Center - Cabarrus County	2275 Kannapolis Hwy Concord, NC 28027	1
6	North Carolina Satellite Services	1216 Raleigh Blvd Raleigh, NC 27604	1
134	Raleigh Good Will	1612 Almaden Raleigh, NC 27615	1
13	Salisbury Community College	1214 Mont Blanc Salisbury, NC 28145	1

Partner Program Drop-Down List

**Note:** Selected Partner Program agencies fund activity services; therefore, no fund tracking will occur in the system for these services.

- Click Select Activity Code and choose the desired program or service from the list displayed.

**Note:** The system relies on critical data relationships (Customer Program Group, LWIA, Provider Type) to determine which services or activities staff may select – sample activities (shown on previous page) and training courses (shown below) indicate the range that may display. Depending on the Customer Program Group, location, and provider selected, the system will determine which services may be displayed. If no providers or programs exist for a particular service code, its name will display.

- Record the activity's Actual Start Date or Projected (future) Start Date.
- Record the activity's Projected End Date.
- Select or change the staff member position, if appropriate.
- To perform case assignment, click Assign Case Manager, Assign Group, or Assign Me.

**Note:** Depending on the current assignment, Assign Group or Assign Me may not display, and Remove Case Manager may display.

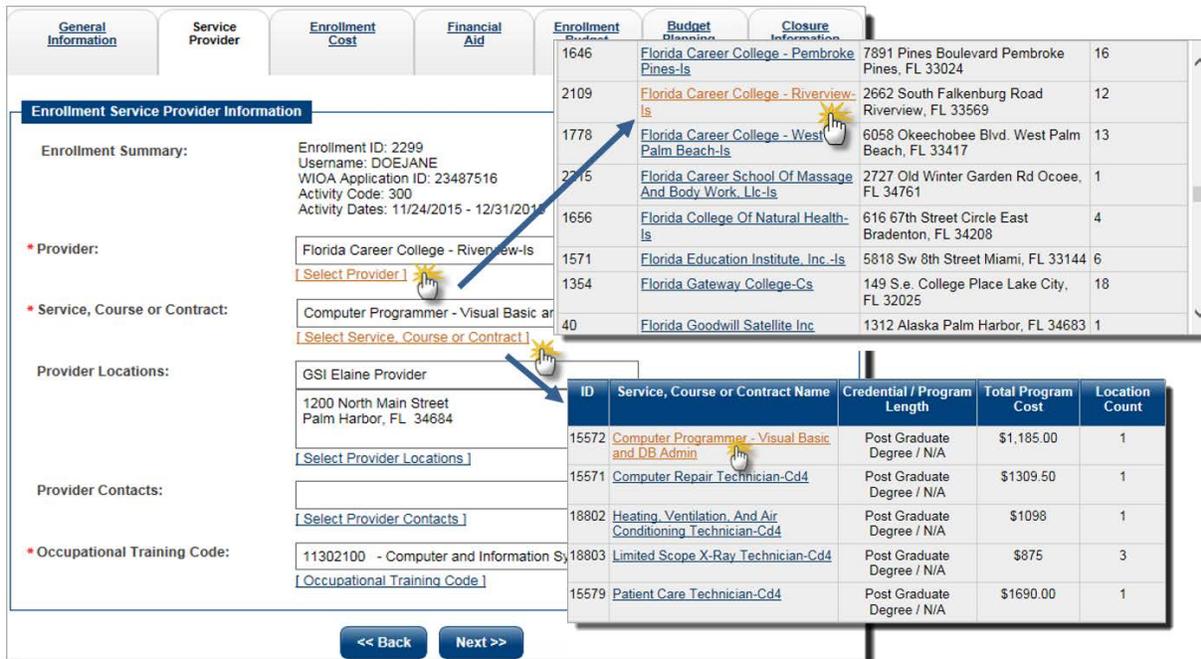
- Type comments, if necessary.
- Click **Next** to save the information and proceed to the next tab.

**Note:** If you click Exit Wizard, all changes will be lost (including the WIOA Participation Record, if this is the first WIOA enrollment activity).

**Service Provider tab:**

From the Service Provider Information tab that displays:

- Click Select Provider to choose the appropriate service provider (required).
- Click Select Service, Course or Contract to define the selected activity (required).
- Click Select Provider Locations to record where the individual will receive the service or training.
- Click Select Provider Contacts to record the contact person associated with the activity service/course.



ID	Service, Course or Contract Name	Credential / Program Length	Total Program Cost	Location Count
15572	Computer Programmer - Visual Basic and DB Admin	Post Graduate Degree / N/A	\$1,185.00	1
15571	Computer Repair Technician-Cd4	Post Graduate Degree / N/A	\$1309.50	1
18802	Heating, Ventilation, And Air Conditioning Technician-Cd4	Post Graduate Degree / N/A	\$1098	1
18803	Limited Scope X-Ray Technician-Cd4	Post Graduate Degree / N/A	\$875	3
15579	Patient Care Technician-Cd4	Post Graduate Degree / N/A	\$1690.00	1

WIOA Activity Enrollment Form – Service Provider Tab

- Click Occupational Training Code to select the occupation associated with the training the individual is receiving (required).

**Note:** The occupations listed are tied to the provider's service record.

- Click **Next** to save the information and proceed to the next tab/page.

**Enrollment Cost tab:**

For an Individualized Training Account (ITA) activity, which typically requires funding, the Enrollment Cost tab opens with the detailed training costs listed (as shown below). For these fee-based training costs, staff can change the cost amounts each for line item and add additional costs.

- Review each of the Training Cost line items (e.g., Tuition Fees, Books) and make changes as needed.

*WIOA Enrollment Form, Enrollment Cost Tab with Line Item Costs Added*

- Click the **Add** button to add other training costs, if needed.

This lets you pick a line item type, and add a separate line item cost for the item needed, which is added in the “Additional Costs” area the bottom of the page.

- Click **Next** to save the costs and any changes and proceed (to the Financial Aid tab).

**Financial Aid tab:**

The Financial Aid tab lets staff identify any financial aid that may also apply (e.g., Pell grants, school scholarship, student loans), and lets staff define how amounts from the grants are used as part of the budget for enrollment in the activity.

- Click **Yes** at the top of the tab, if financial aid applies, related to the funded training/service costs. This expands the tab to show the current planned cost, and includes a link to add financial aid.

**Note:** *If no financial aid applies, click **Next** to proceed to the Enrollment Budget tab.*

- Click the link To Add Financial Aid.

This will open a dialog box from which you can select the type of Financial Aid.

- Select the type of financial aid from the list. An additional Financial Aid contribution area will display (as shown below).

*WIOA Enrollment Financial Aid Screen, Adding Financial Aid*

**Note:** Staff can click the **Calculate** link to compute the amount of financial aid applicable, as shown in the screen sample above. The system automatically recalculates the new planning cost based on these staff actions.

- Click **Next** to save any Financial Aid being applied to costs and proceed to the Enrollment Budget tab.

**Enrollment Budget tab:**

The Enrollment Budget tab lets staff identify the budget stream from which this funding will be allocated. The configuration of your site's Individual Fund Track (IFT) and fund stream management may display the default fund stream (as show in the Budget Allocation area in the following figure). If there are several fund streams available, you can pick a fund stream for budgeting or change the displayed fund stream used for the budget.

- Review the displayed budget stream and budget allocation, and make any needed changes.
- To select or change the funding stream:
  - Click the Select a Budget link.  
The system displays all applicable fund streams based on the following: *LWIA, customer program group, activity code, service dates, service costs, and fund stream setup.*
  - Click the desired *Item* link under the Available Budgets column, as shown in the figure below.

**Budget Allocation**

[\[ Click Here To Select a Budget \]](#)

**Select a Budget**  
Select one budget from the list.

Available Budgets	Budget Amount	Available Balance
<a href="#">Test DW Fund</a> PY 2012 (6/1/2012 - 6/1/2013) Capital Area Workforce Development Board [LWIA/Region]	\$500,000.00	\$524,325.00
<a href="#">Default WIOA Allocation Funding</a> PY 2014 (7/1/2014 - 6/30/2015) Capital Area Workforce Development Board [LWIA/Region]	\$500,000.00	\$524,905.00
<a href="#">NFSSW</a> Q3 2014 (10/1/2014 - 12/31/2014) State [State]	\$400,000.00	\$400,000.00
<a href="#">IFT3</a> Program Year (1/1/2014 - 12/31/2014) State [State]	\$10,000.00	\$0.00

*Enrollment Budget Tab*

The fund stream and funded amount is displayed in the Budget Allocation area.

**Note:** *If staff is allowed to edit fund amounts, an [Edit](#) link displays in the action column. Staff may want to change the funded amount. For example, if several funding streams are possible, they may use two funding streams and split the enrollment funding by adding and editing amounts for two different budget fund streams. The “Funded Amount” is usually the total service cost, if such funding is available.*

- To edit the funded amount:
  - Click the [Edit](#) link to see the current funded cost allocations for the selected budget (in an Edit Funded Cost window).
  - Edit the funded amount and click **Save**.

The funded amount change is reflected on the screen (i.e., the Current Balance is adjusted).

**Enrollment Budget Information**

Enrollment Summary: Enrollment ID: 2302  
Username: DOEJANE  
WIOA Application ID: 23487516  
Activity Code: 300  
Activity Dates: 11/24/2015 - 1/30/2016

Total Enrollment Cost: \$1,185.00  
Financial Aid Contribution: \$250.00  
Net Cost: \$935.00  
Total Funded Costs: \$935.00  
Total Obligations: \$0.00  
Costs To Be Funded: \$0.00

**Edit Funded Cost**  
Change or remove the funded cost amount for this record.

**Funded Cost Allocation**

Budget Amount: \$500,000.00  
Available to Allocate: \$589,140.00  
Available to Obligate: \$489,140.00  
Funded Amount: \$ 935.00

Budget	Funded Amount	Obligated Amount	Current Balance	Action
Default WIOA Allocation 2014-2015 Fiscal Year (7/1/2014 - 6/30/2015) State [State]	\$935.00	\$0.00	\$935.00	Edit Hist

[ Click Here To Select a Budget ]

<< Back Next >>

[ Exit Wizard ]

*WIOA Enrollment Budget Information, Selecting a Budget*

- Click **Next** to save the changes and proceed (to the Enrollment Budget tab).

**Budget Planning tab:**

The Budget Planning tab displays the final funded amount, obligated amount, current balance, as well as any payment and refunds related to the budget for this enrollment.

If staff has advanced abilities for fund tracking, they can click an Add a Voucher link (shown in the following figure) to create a voucher for this funded activity. The system will display a popup window that allows staff to enter information about the voucher (related to the cost details and service information for the enrollment).

► **To add a voucher:**

- Click the Add a Voucher link.

The separate Voucher screen displays with areas for defining the voucher information.

- Make any appropriate changes in the Manage Voucher and Service Provided Between sections.
- Make any adjustments for the Voucher to be created in the Cost Details section (the available and planned amounts are shown).

General Information	Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning
<b>Budget Plan Information</b>					
Enrollment Summary:		Enrollment ID: 2302 Username: DOEJANE WIOA Application ID: 23487516 Activity Code: 300 Activity Dates: 11/24/2015 - 1/30/2016			
Total Funded Costs:	\$935.00	<a href="#">Add / View</a>			
Total Obligations:	\$0.00				
Total Paid Obligations:	\$0.00				
Total Outstanding Obligations:	\$0.00				
Total Funded Costs to be Obligated:	\$935.00				
[*] Show Filter Criteria (Showing all records)					
<b>Default WIOA Allocation : Default Time Period</b>					
Budget Location: WorkForce North Tampa - 4460					
Funded Amount: \$935.00	Obligated Amount: \$0.00	Current Balance: \$935.00			
Total Payments: \$0.00	Total Refunds: \$0.00	Total Paid: \$0.00			
<div style="border: 1px solid blue; padding: 5px; display: inline-block;">           Certain staff may have abilities to complete detailed vouchers.         </div>		<a href="#">[ Add a Voucher ]</a> You have no records			
<a href="#">[ Exit Wizard ]</a>		<a href="#">&lt;&lt; Back</a>		<a href="#">Next &gt;&gt;</a>	

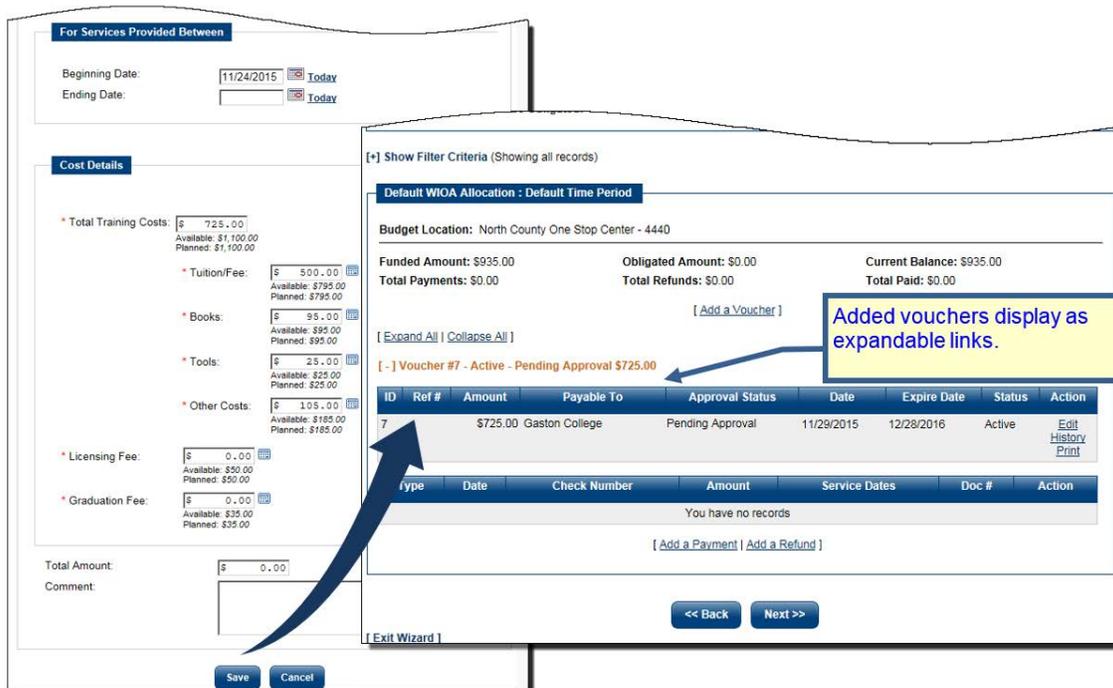
  

Voucher	
Please provide information for the data items listed below.	
<b>Summary</b>	
Participant:	Jane S Doe 3670 N L ST Pensacola, FL 32505 8630
State ID:	8630
Program:	Workforce Innovation and Opportunity Act (WIOA) Program
Service:	Computer Programming
Actual Begin Date:	11/24/2015
Projected End Date:	12/31/2015
Actual End Date:	N/A
Fund Stream:	Default WIOA Allocation
Provider:	GSI Elaine Provider 1200 North Main Street Palm Harbor, FL 34684
Provider FEID/SSN:	06032014
<b>Manage Voucher</b>	
Funds Available:	\$935.00
Status:	<input checked="" type="radio"/> Active <input type="radio"/> Void <input type="radio"/> Paid In Full
Approval Status:	<input checked="" type="radio"/> Pending Approval <input type="radio"/> Approved
Payable To:	<input type="radio"/> Participant <input checked="" type="radio"/> Service Provider <input type="radio"/> Another Provider
Bill Address1:	1200 North Main Street
Bill Address2:	
Bill City:	Palm Harbor
Bill State:	Florida
Bill Zip:	34684
Address Update Options:	<input checked="" type="radio"/> Update Address for this Obligation only <input type="radio"/> Update Address in Provider profile
Student ID:	
Reference No:	
Date:	11/29/2015 <input type="button" value="Today"/>
Expire Date:	11/28/2016 <input type="button" value="Today"/>
<b>For Services Provided Between</b>	

### Enrollment Budget Plan Tab (Entering a Voucher)

- Click **Save** at the bottom of the Voucher screen after entries/changes are made. The Budget Planning tab will redisplay with the planned voucher (and pending approval) shown via a link at the bottom of the screen.
 

**Note:** *If you want to review the voucher, click the added Voucher link to expand or collapse the record details for payments or refunds related to the voucher (as shown below).*
- Click **Save** after making any changes to the planned budget for vouchers, payments, or refunds. The Closure Information tab will display.



*Enrollment Budget Plan Tab (Completing and Reviewing a Voucher)*

**Closure Information tab:**

The Closure Information tab is used to enter the final activity date and the completion of the enrollment activity. It can also be used to record any received credential data, or case notes, leading up to the closure of the activity.

To close the activity, staff must:

- Enter a Last Activity Date.
- Enter a Completion Code.
- Indicate if a credential was received.
  - If a credential was received, staff may also need to enter:
    - Credential Type
    - Verification
    - Credential Date
- Enter an optional Case Note

**Note:** *The bottom of the tab will include a **Delete** button until the activity is closed. This ability to delete the enrollment will depend on privileges set for staff as well as the status, vouchers, and funding associated with the enrollment. The top of the screen will note the status that prevents the deletion, if a status exists. For example, the top of the screen may display these two bullets:*

- *The 'isfirst' enrollment record can only be deleted by clicking Delete on the Participation Record.*
- *Please void all vouchers and reduce funding to zero on the Enrollment Budget tab before deleting.*

General Information	Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information								
<b>Closure Information</b>														
Enrollment Summary:		Enrollment ID: 8774 Username: GSIRALEIGH WIOA Application ID: 49009 Activity Code: 181 Activity Dates: 11/23/2015 - 11/23/2015												
Last Activity Date:		<input type="text" value="10/27/2015"/> <a href="#">Today</a> <small>You do not have sufficient privileges to modify this field.</small>												
Completion Code:		<input type="text" value="Successful Completion"/> <small>Completion Status cannot be modified.</small>												
Received Credential:		Not Applicable.												
Case Notes:		<a href="#">Add a new Case Note</a>   <a href="#">Show Filter Criteria</a>												
		<table border="1"> <thead> <tr> <th>ID</th> <th>Create Date</th> <th>Subject</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td colspan="4">No data found.</td> </tr> </tbody> </table>					ID	Create Date	Subject	Action	No data found.			
ID	Create Date	Subject	Action											
No data found.														
<b>Credential History</b>														
Education/Credential History:														
		<input type="button" value=" &lt;&lt; Back"/> <input type="button" value=" Finish"/> <input type="button" value=" Delete"/>			<a href="#">Finish and Start a New Activity</a>									
<a href="#">Exit Wizard</a>														

Closure Information tab

- Click **Finish**.

**Note:** If the service has not ended or closure information is not available, staff can click the **Finish** button. However, if the service has ended and several services are being entered, staff can also click the Finish and Start a New Activity link at the bottom of the page, which will take staff back to the General Information tab for another activity.

If information must be changed, staff can click a **Back** button to return to a previous tab.

When staff clicks the **Finish** button, the system re-displays the Programs tab screen (as shown in the figure below) with a WIOA Registration/Activity Record table that lists the first enrollment activity.

[Create Workforce Innovation and Opportunity Act \(WIOA\) Program](#)




[Workforce Innovation and Opportunity Act \(WIOA\) Program #4345655, App Date 10/9/2015, Adult Eligibility\(LI\) 10/9/2015, L/WIA 47 \(Complete\) | \[WIOA Test Harness\]\(#\)](#)  
 Case Manager: Rosario, Sandra  
 Temp Assigned: None Assigned

[Create Participation](#)

[Edit Participation for WIOA #4345655 Participation Date 10/9/2015](#)

[Create Activity](#)

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	<a href="#">101 - Orientation</a> Piedmont Triad Regional Council		Adult	10/09/15	10/09/15	10/09/15	<a href="#">10/09/15</a> Successful Completion
	<a href="#">181 - Supportive Service - Transportation Assistance**</a> Salisbury Community College		Adult	10/27/15	10/27/15	10/27/15	<a href="#">10/27/15</a> Successful Completion
	<a href="#">300 - Occupational Skills Training - Approved Provider List (ITA)</a>		Adult	11/06/15	11/06/15	12/11/15	<a href="#">Close</a>

[Create Closure](#)

[Create Outcome](#)

*Updated Programs Tab Screen*

Staff may perform the following tasks from the Programs tab (after activities are created):

- Click [Create Activity](#) to record an additional enrollment activity. Staff may continue to create WIOA activities until they complete the WIOA Application, including individualized training activities. For details of the enrollment in these training services, also see the next topic.
- Click the edit wizard icon  to access the wizard view format for activity details.
- Click the [Close](#) link to close the activity service.

## Measurable Skills Gain

The purpose of the Skills Achievement screen is to record data necessary for WIOA PIRL extracts and to calculate performance for the WIOA Measurable Skill Gains performance measure. When staff clicks [Create Measurable Skills Gain](#), the system displays a screen that consists of multiple sections, whose descriptions follow.

### General Information Section

Based on staff's region and office affiliation, the system will autofill this data for staff. If staff belongs to multiple workforce regions and/or offices, they must select the appropriate value(s) as they pertain to the customer they currently manage.

**General Information**

**User Login:** GSIQMARIE  
**State ID:** 8730  
**User ID:** 11606  
**Name:** Ann Marie  
**Program Entry Date:** 04/19/2018  
**\* LWDB:**    
**\* Office Location:**  

*General Information Section*

## Skill Attainment Information Section

Staff completes this section to document the customer's progress based on measurable skills gained.

Skill Attainment Information

Fill in the following information for the skill achievement. **Program:** Title I - Workforce Development (WIOA)

\* **Skill Type:**

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

\* **Type of Achievement:**

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

### Skill Attainment Information Section

To complete this section, staff performs the following:

- Select the desired skill type.
- Enter the date the customer attained the skill.
- Select the desired achievement type.
- Click Verify to access a list of approved verification documents and click to select one.

**Note:** *In some instances, staff enters the name of the verification document manually.*

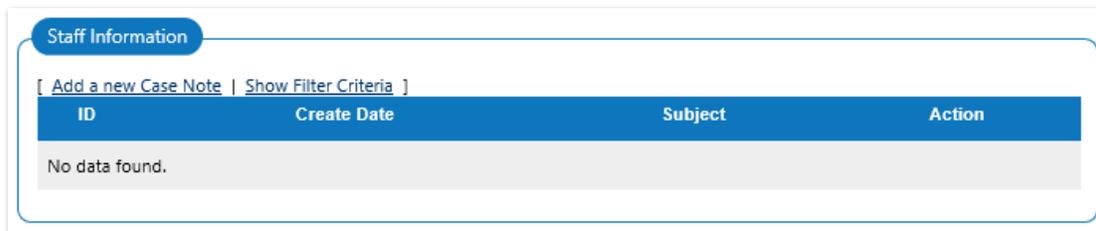
The following table displays the combination of skill types and achievement types available:

Skill Type	Achievement Type
<b>Post-secondary Transcript/Report Card</b>	<ul style="list-style-type: none"> <li>• Completed minimum of 12 hours in semester and meets academic standard</li> <li>• Part-time student and completed at least 12 credit hours over the course of two completed consecutive semesters and meets academic standards</li> </ul>
<b>Secondary Transcript/Report Card</b>	<ul style="list-style-type: none"> <li>• Report card/transcript for one semester and meets academic standards</li> </ul>
<b>Training Milestone</b>	<ul style="list-style-type: none"> <li>• Completed 1 year of Registered Apprenticeship program and achieved satisfactory or better progress report</li> <li>• Achieved satisfactory or better progress reports towards an established OJT training milestone – not previously recorded</li> <li>• Other training milestone</li> </ul>
<b>Skills Progression</b>	<ul style="list-style-type: none"> <li>• Successfully completed a required exam for a particular occupation</li> <li>• Satisfactory progress in attaining technical or occupational skills as evidenced by trade-related benchmarks, such as knowledge-based exams</li> <li>• Other skills progression achievement</li> </ul>

## Staff Information Section

Staff may click [Add a new Case Note](#) to create a case note that will be maintained in two locations of the customer's account:

- Measurable Skills Gain record
- Case Notes Tab screen of staff's General Profile



Staff Information

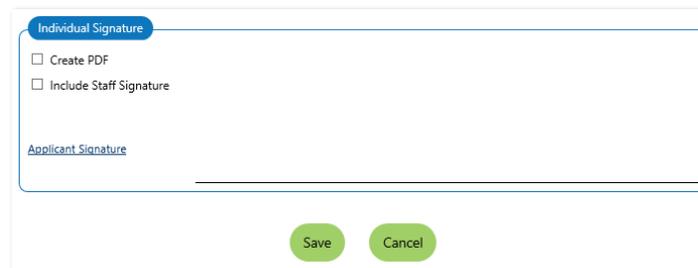
[ [Add a new Case Note](#) | [Show Filter Criteria](#) ]

ID	Create Date	Subject	Action
No data found.			

#### Staff Information Section

**Note:** For systems configured to include the digital signature pad, there is an area for the individual's signature. The keypad will allow an individual applicant to sign, and staff can identify if their staff signature is included, as well as whether the application is saved with the signature as a PDF. Staff can check the box to include their staff signature if they have already saved their signature from their My Staff Account page.

- Click **Save** to secure the data entry.



Individual Signature

Create PDF

Include Staff Signature

Applicant Signature \_\_\_\_\_

Save Cancel

#### Individual Signature Area

## Partner Programs

The Partner Program link is used to simply indicate if the individual received services from any known partner programs during program participation in WIOA.

### ► To complete the Partner Programs form:

- Click the [Add/Edit Partner Programs](#) link.

This will open a form listing known partner programs (based on the Customer Group and other data supplied at the beginning of the WIOA Application).

**Partner Programs**

Please indicate if the individual received services from the following partner programs during program participation.

**Adult Education:**  Yes  No  Participant did not self-identify

**Employment and Training Services related to SNAP:**  Yes  No  Participant did not self-identify

**H-1B Funded Program:**  Yes  No  Participant did not self-identify

**H-1B Funded Program Grant Number (If unknown, enter all 9s.):**

Format: AA-99999-99-99-A-99

**Homeless Veterans' Reintegration Program:**  Yes  No  Participant did not self-identify

**Homeless Veterans' Reintegration Program Grantee:**

Format: 99999

**Indian and Native American (INA) Programs:**  Yes  No  Participant did not self-identify

**Indian and Native American Programs Grant Number (If unknown, enter all 9s.):**

Format: AA-99999-99-99-A-99

**Job Corps:**  Yes  No  Participant did not self-identify

Format: AA-99999-99-99-A-99

**Other WIOA or non-WIOA Programs:**  Yes  No  Participant did not self-identify

**Employment First State Leadership Mentoring Program (EFSLMP):**  Yes  No  Participant did not self-identify

**Intellectual and/or Developmental Disability Program:**  Yes  No  Participant did not self-identify

**Mental Health Program:**  Yes  No  Participant did not self-identify

**Reintegration of ER-Offenders (Adult) Program:**  Yes  No  Participant did not self-identify

**Reintegration of ER-Offenders (Adult) Program Grant Number:**

Format: AA-99999-99-99-A-99

**Program Grant Number:**

Format: AA-99999-99-99-A-99

**Reintegration of ER-Offenders (Youth) Program:**  Yes  No  Participant did not self-identify

**Reintegration of ER-Offenders (Youth) Program Grant Number:**

Format: AA-99999-99-99-A-99

**Senior Community Service Employment Program (SCSEP):**  Yes  No  Participant did not self-identify

**SCSEP Grant Number (If unknown, enter all 9s.):**

Format: AA-99999-99-99-A-99

**Vocational Education (Carl Perkins Vocational and Applied Technology Education Act):**  Yes  No  Participant did not self-identify

**Vocational Rehabilitation and Employment (VR & E) Services (Veteran's VR):**  Yes  No  Participant did not self-identify

**Vocational Rehabilitation Services (Parts A and B of the Rehabilitation Act of 1973):**  Yes  No  Participant did not self-identify

**YouthBuild:**  Yes  No  Participant did not self-identify

**YouthBuild Grant Number (If unknown, enter all 9s.):**

Format: AA-99999-99-99-A-99

Partner Programs Form

- Answer all fields, based on participant input.
- Click the **Save** button.

The Partner Programs tab is redisplayed.

**Partner Programs** 1

[Add/Edit Partner Programs](#)

Partner Programs Tab

**Note:** You can click the [Add/Edit Partner Programs](#) link to return and edit the form, but there is no table under the Partner Programs bar. However, you will see the number “1” display, which indicates that the form has a completed entry.

## Training Justification

The Training Justification form is used to document an individual's eligibility for training services as outlined in WIOA Section 134(c)(3)(A)(i) and TEGL 3-15.

Conditions 1 through 6 must all be set to **Yes** for Meets Training Justification Requirements to indicate Yes

**General Information**

User Name/Login Name: JUSTTRAIN1  
 User ID: 9560063  
 State ID: 12893  
 Name: Justin Training  
 Application Number: 160341809  
 Eligibility Dates: Adult: 06/12/2018  
 Dislocated Worker:   
 Priority Level: Adult: Level 1 - VET  
 Case Manager: Hamlin, Lisa

**Location Information**

\* LWDB:  
  
 \* Office Location:

**Training Justification**

\* Training Justification Date: 06/15/2018 (mm/dd/yyyy)

\* Recommended Types of Training:  
 On-the-job training  
 Skill Upgrading  
 Entrepreneurial Training  
 ABE or ESL in conjunction with Training  
 Customized Training  
 Other Occupational Skills Training  
 Prerequisite Training  
 Registered Apprenticeship Training  
 Youth Occupational Skills Training  
 Other Non-Occupational Skills Training

\* Occupation(s) expected from selected training:  
[Add an Occupation](#)

\* Industry/Industries in which employment is expected:  
[Add an Industry](#)

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

or retain  Yes  No

**Condition 3- Has the skills and qualifications to successfully participate in the selected program of training services:**  Yes  No

\* Condition 4- Has selected a program of training services that is directly linked to employment opportunities in the local area or planning region, or in another area to which the individual is willing to commute or relocate:  Yes  No

\* Condition 5- Is unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as State-funded training funds or Federal Pell Grants, or requires WIOA assistance in addition to other sources of grant assistance, including Federal Pell Grants:  Yes  No

\* Condition 6- Is determined eligible in accordance with the State and local priority system in effect for adults if training services are to be provided through the adult fund stream:  Yes  No

\* Condition 7- TAA Petition Pending -Is a member of a worker group covered by a petition filed for Trade Adjustment Assistance (TAA) and is awaiting a determination:  Yes  No

*Note: If the petition is certified, the worker may then transition to TAA approved training. If the petition is denied, the worker will continue training under WIOA.*

**Training Approval**

Meets Training Justification Requirements:  Yes  No

Training Approval Date:  (mm/dd/yyyy)

Training Approval Staff User:

**Staff Information**

Comments:  
*The maximum number of characters is 500.*

This note is displayed when Condition 7 is set to **Yes**

Training Justification Form

This form is available on the Program tab once there is an enrollment under either the Adult or Dislocated Worker customer groups into one of these WIOA services:

- Formula
- Statewide funds
- National Dislocated Worker Grants (NDWG), excluding incumbent worker

If the system is configured to include Youth categories, a link to the form will be available on the Programs tab once there is an enrollment into a Youth customer group.

To initiate a record, click on the **+** **Training Justification** bar on the WIOA application, then click the [Add Training Justification](#) link.

**Note:** *Multiple Training Justification records are allowed for one WIOA application.*

*If this form was converted from a pre-existing record, it will be read-only and include the message: [This is a converted record](#). Edits are not allowed.*

### General Information Section

All data in this section is prefilled by the system and cannot be edited.

- Eligibility Dates are shown for Adult, Dislocated Worker and Youth (when applicable).
- Priority Level is displayed based data captured for the individual in the WIOA application.

### Location Information Section

- Based on staff's region and office affiliation, the system will autofill this data. If staff belongs to multiple workforce regions and/or offices, they must select the appropriate value(s) as they pertain to the customer they currently manage.

### Training Justification Section

To complete this section, staff performs the following:

- Enter a Training Justification Date. Training Justification Date:
  - Defaults to system date
  - Cannot be greater than the system date
  - Cannot be less than the Participation Date.
- Select the Recommended Types of Training from the list by checking all applicable boxes.
- Click the [Add An Occupation](#) link to search for and select the occupation expected to result from the selected training. Additional occupations can be added by repeating this process.
- Click the [Add an Industry](#) link to search for and select the industry in which employment is expected. Additional industries can be added by repeating this process
- Select Yes or No for each of Conditions 1 through 6.

**Note:** *In order for Meets Training Justification Requirements to indicate Yes, Conditions 1 through 6 must be set to Yes.*

- Select Yes or No for Condition 7.

**Note:** *When Condition 7 is set to Yes, the following note will be displayed:*

*[Note: If the petition is certified, the worker may then transition to TAA approved training. If the petition is denied, the worker will continue training under WIOA.](#)*

### Training Approval Section

Meets Training Justification Requirements will autofill based on the responses to Conditions 1 through 6 in the Training Justification section.

Staff User name is auto-filled by the system.

- Enter the Training Approval Date manually or by using the date widget. Training Approval Date:

- Defaults to system date
- Cannot be greater than the system date
- Cannot be less than the Participation Date.

### Staff Information Section

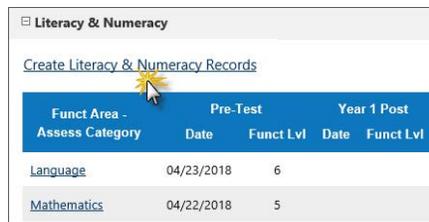
- Staff can enter an optional comment of up to 500 characters in the space provided. A **Spell Check** link will check spelling of the entered text.
- You must click the **Save** button to save your changes.

## Literacy & Numeracy Scores

Upon successfully completing a WIOA Application for an In-School Youth (ISY) or an Out-of-School Youth (OSY), the first two enrollments will usually be for recording an Objective Assessment (e.g., Youth Service 412), followed by developing an IEP/ISS Service Strategy (e.g., Youth Service 413).

The creation of the initial, *pre-test* record for a Literacy & Numeracy score (before any Objective Assessment Tests and related services occur), as well as recording additional *post-test* scores, are done from a link under the  **Literacy & Numeracy** bar.

Clicking the [Create Literacy & Numeracy Records](#) link opens an interface designed to meet WIOA Youth Literacy and Numeracy data collection and reporting requirements. Literacy and Numeracy gains are reported for all youth participants (both ISY and OSY).



Funct Area - Assess Category	Date	Pre-Test	Year 1 Post
		Funct Lvl	Date Funct Lvl
Language	04/23/2018	6	
Mathematics	04/22/2018	5	

### [Create Literacy & Numeracy Records Link](#)

Sites are required to document participant functional areas of deficiency, to provide services to improve areas of deficiency, and to track progress toward improving functional area deficiencies through post testing for all youth who are determined Basic Skills Deficient and who are not enrolled in secondary education.

This interface provides a data collection method to record pre-test data, and allows entry of multiple progress assessments for each participation year that allows staff to flag the progress assessment as the participation year's posttest for federal reporting purposes.

**Note:** *The [Create Literacy & Numeracy Records](#) link is mainly used for WIOA youth, although WIOA adults and dislocated workers may also be included by request. While federal requirements involve only youth, the system has been designed with a switch to allow sites to collect data for all customer program groups if desired.*

*Although your site/organization may require that both an Objective Assessment and an IEP/ISS Service Strategy be the first two activities for a WIOA youth application, the system does not automatically enforce this for the youth application.*

## Literacy & Numeracy Pre-Test Assessment

### ► To record a literacy and numeracy pre-test assessment:

- Click the [Create Literacy & Numeracy Records](#) link (under the expanded grey bar). The WIOA Literacy & Numeracy Information screen displays (with fields empty).
- Enter the appropriate information for each displayed field:

### General Information Section

- Make required selections:
  - **Customer Group** - This drop-down is defaulted to a group (e.g., to *Youth*), and may have no other selections. If multiple selections are possible, pick the appropriate customer group.
  - **LWIA/Region** – Select the LWIA associated with the assessment.
  - **One Stop** – Select the specific One-Stop location associated with the LWIA.

**Note:** *As you select required items from drop-down lists, the page will “refresh” or “redraw,” and display additional items based on your selections. It is important to let the system fully refresh the page each time, before attempting to record additional information.*

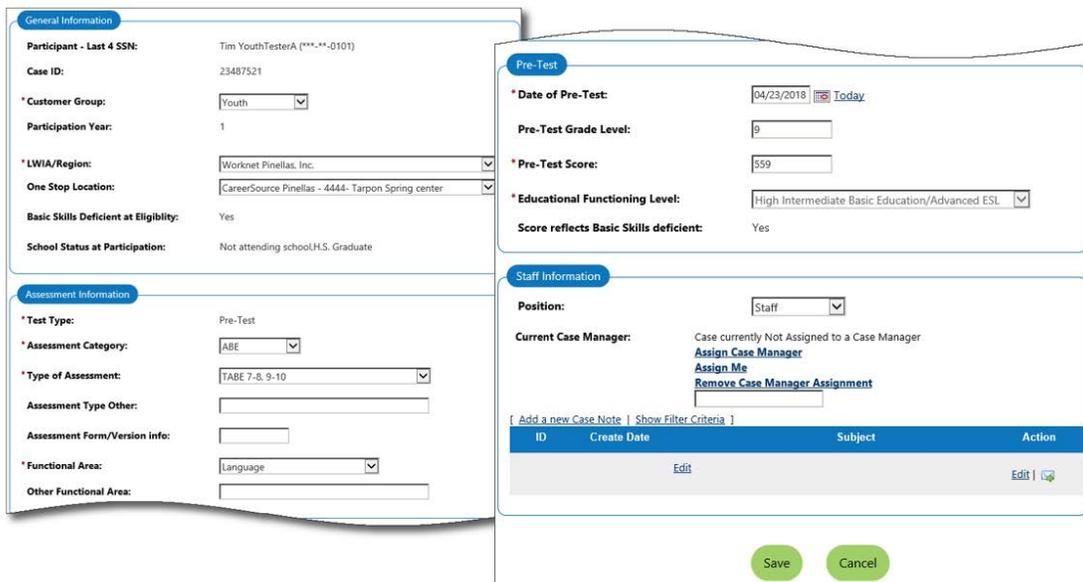
### Assessment Information and Pre-Test Sections

- Enter the appropriate values as you gather data for a specific pretest assessment (e.g., *Language*).

**Note:** *When a staff member makes assessment entries for the first time, the field Test Type is prefilled with Pre-Test.*

### Staff Information Section

- Make any changes to Position, Current Case Manager, and or add/edit Case Notes, as appropriate.



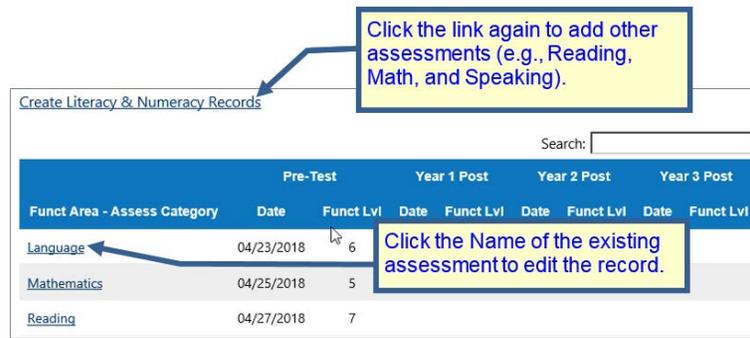
The screenshot displays a web application interface for creating literacy and numeracy records. It is divided into four main sections:

- General Information:** Includes fields for Participant - Last 4 SSN (Tim YouthTesterA), Case ID (23487521), Customer Group (Youth), Participation Year (1), LWIA/Region (Worknet Pinellas, Inc.), One Stop Location (CareerSource Pinellas - 4444- Tarpon Spring center), Basic Skills Deficient at Eligibility (Yes), and School Status at Participation (Not attending school/H.S. Graduate).
- Assessment Information:** Includes Test Type (Pre-Test), Assessment Category (ABE), Type of Assessment (TABE 7-8, 9-10), Assessment Type Other, Assessment Form/Version Info, Functional Area (Language), and Other Functional Area.
- Pre-Test:** Includes Date of Pre-Test (04/23/2018), Pre-Test Grade Level (9), Pre-Test Score (559), Educational Functioning Level (High Intermediate Basic Education/Advanced ESL), and Score reflects Basic Skills deficient (Yes).
- Staff Information:** Includes Position (Staff), Current Case Manager (Case currently Not Assigned to a Case Manager), and links for Assign Case Manager, Assign Me, and Remove Case Manager Assignment. Below this is a table with columns for ID, Create Date, Subject, and Action, containing one row with an Edit link.

At the bottom of the form are Save and Cancel buttons.

*Create Literacy & Numeracy Records Screen*

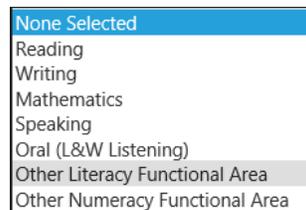
- Click the **Save** button.  
This process records the data entries in each section, and shows the record on the redisplayed Literacy and Numeracy area of the Programs tab (as shown below).



*Literacy & Numeracy Records – List Area on Programs Tab*

Staff can click on the name of the test area (the Assessment Category) to open and edit the saved record. The name in the left column is a link – such as [Language](#) (as shown in the figure above).

**Notes:** To record additional progress assessments for Literacy and Numeracy (such as pretest assessment for Reading, Writing, Math, or Speaking), repeat the previous steps, selecting the different Assessment Category and/or Type of Assessment. The selection below shows a range of assessment selections that might display the Category, ESL. The interface will not limit pretest entries, but for federal reporting, only those pretests for youth that are within 60 days of the application’s participation date will be reported.



*Assessment Selection Box*

Only one post-test may be used per participation year.

### Literacy & Numeracy Progress Assessment

Once you create a pretest assessment to record the individual’s skill level, you can monitor any improvement made by recording progress assessments since the initial pretest.

- Click an existing assessment link within the Literacy & Numeracy Record table to access the screen for the Pretest Assessment to be updated (a sample of which is shown below). Data in the General Information section will already be largely prefilled. Select your office.



*Updated Pre-Test Assessment Record - Progress Test Entry*

- Click the Create Progress/Post Assessment Record link in the Progress/Assessments area of the screen. The system expands to display a Progress/Post Assessment area similar to the one above.
- In the expanded Progress/Post Assessments area, select **Progress Test** (or Post Test if applicable) as the type of test.
- Enter the updated Progress Test Functional Score.  
The system will complete the Educational Functioning Level. The system also completes the checkbox indicating if the participant remains deficient in basic skills, based on the score.
- Enter the date of the assessment.
- Click **Save** to secure your edits. The system will display the updated Pre-Test Assessment screen, as shown in the following example:

Score reflects Basic Skills deficient: Yes

**Staff Information**

Position: Staff  
 Staff User Add: 9559882  
 Create Date: 04/27/2018  
 Staff User Edit: 9559882  
 Edit Date: 04/27/2018  
 Current Case Manager: Case currently Not Assigned to a Case Manager  
[Assign Case Manager](#)  
[Remove Case Manager Assignment](#)

[ Add a new Case Note | Show Filter Criteria ]

ID	Create Date	Subject	Action
No data found.			

**Progress/Post Assessments**

Date Assessed	Educational Functioning Level	Year	Test Type	Action
3/27/2017	Intermediate Adult Secondary Education	1	Progress Test	<a href="#">Edit</a>
5/28/2018	High Adult Secondary Education	2	Progress Test	<a href="#">Edit</a>

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

[Create Progress/Post Assessment Record](#)

Save Cancel Delete Print

### Updated Pre-Test Assessment Record - Progress Tests Listed

To obtain details about a progress assessment, click the assessment [Edit](#) link.

You can create multiple progress assessments on the individual's behalf for each participation year. Use the [Create Progress Assessment Record](#) link again to create a new progress assessment record.

You may also use this screen to record a posttest assessment for reporting purposes. For details, refer to the next topic.

## Literacy & Numeracy Post-Test Assessment

You will use the same steps for Post-Test Assessment, as indicated above for the Progress Test Assessment. In other words:

- Click the [Create Progress Assessment Record](#) link in the Progress/Assessments area of the screen. The system expands to display a Progress/Post Assessment area similar to one above.
- In the expanded Progress/Post Assessments area, select **Post Test** as the type of test.
- Enter the updated Post Test Functional Score.

The system will complete the Educational Functioning Level. The system also completes the checkbox indicating if the participant remains deficient in basic skills, based on the score.

- Enter the date of the assessment, and any other need changes (e.g. Assessment Form/Version or Position).

*Progress/Post Assessments Area for Post-Test Record*

- Click **Save** to secure your edits.

The system displays the Post-Test Assessment (along with any other Pre-Test and Post-Test scores) in the updated Literacy Numeracy table on the Programs tab (as shown below).

Literacy & Numeracy								
Create Literacy & Numeracy Records								
Funct Area - Assess Category	Pre-Test		Year 1 Post		Year 2 Post		Year 3 Post	
	Date	Funct Lvl	Date	Funct Lvl	Date	Funct Lvl	Date	Funct Lvl
Reading	11/16/2016	5	09/27/2017	8	04/22/2018	8		
Mathematics	11/16/2016	4	09/29/2017	5	04/27/2018	8		
Language	12/27/2016	4						

*Excerpt of Updated Programs Tab*

**Note:** If you click on an assessment category, you will see the listing of both the Progress Test(s) and Post Test(s) in the Progress/Post Assessments area – the area from which you can click Edit, to make changes to the test. The Test Type column indicates whether the test is a Progress or Post Test.

Date Assessed	Educational Functioning Level	Year	Test Type	Action
4/27/2018	High Adult Secondary Education	2	Post Test	<a href="#">Edit</a>
9/29/2017	Low Intermediate Basic Educ/High Intermediate ESL	1	Post Test	<a href="#">Edit</a>
3/21/2017	High Adult Secondary Education	1	Progress Test	<a href="#">Edit</a>

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

[Create Progress/Post Assessment Record](#)

*Progress Assessments Section with Pre- and Post-Test Assessment Records*

## Youth Goals

Although not federally required (unless under special circumstances), state or local business rules, or site configuration may require staff to document at least one youth goal on the individual's behalf before youth enroll in their second WIOA activity service. The Youth Goal form is provided to record a goal established for a youth applicant.

Multiple youth goals may be created for a single WIOA application.

**Note:** Youth goals are sequentially numbered by the system. The Goal # is shown in the Skill Attainment section of the form and cannot be changed by staff. If a Youth Goal is deleted, any remaining goals are renumbered.

To create a youth goal, click on the **+** Youth Goals bar on the WIOA application, then click the Add Youth Goal link.

The screenshot displays the 'Youth Goals Form' with several sections and callouts:

- General Information:** Fields for User ID (9560063), Login Name (JUSTTRAIN1), SSN (067-76-9898), Name (Justin Training), Basic Skills Deficient/Low Levels of Literacy (Yes), Local Workforce Investment Area (Worknet Pinellas, Inc.), and One Stop Location (CareerSource Pinellas - 4440- Gulf-to-Bay center).
- Skill Attainment:** Fields for ARRA (Stimulus Goal) (Yes/No), Goal # (1), Specify Goal (text input), Goal Type (Work Readiness Skills), Date Set - Goal (calendar), Anniversary Date - Goal #, Extended Anniversary Date, and Attainment of Goal (Set, but attainment pending). A callout shows a dropdown menu with options: None Selected, Basic Skills, Occupational Skills, and Work Readiness Skills.
- Staff Section:** Includes Case Notes (Add a new Case Note, Show Filter Criteria, table with columns ID, Create Date, Subject, Action), Current Case Manager (Group: WorkNet Pinellas, Case Manager: Hamlin, Lisa, Temporary Case Manager: Not Applicable, Assign Case Manager, Assign Me, Remove Case Manager Assignment), and Previous Case Manager (text input). A callout shows a dropdown menu with options: None Selected, Attained, Set, but not attained, and Set, but attainment pending.
- Buttons:** Save and Cancel buttons at the bottom.

Youth Goals Form

**General Information Section**

- The information displayed in this section is pre-filled from the WIOA application.
- If staff belongs to multiple workforce regions and/or offices, they must select the appropriate value(s) as they pertain to the customer they currently manage.

**Skill Attainment Section**

Generally, the first youth goal that is created is a Basic Skills goal. Staff may choose other goal types for subsequent goals, such as goals related to occupational skills and work readiness skills.

- Enter a description of the goal in the Specify Goal field.
- Select the desired Goal Type.
- Enter the date that the goal is being set.

**Note:** *The system will automatically set the Anniversary Date – Goal # and Extended Anniversary date for one year from the Date Set – Goal value.*

- Select Attainment of Goal status from the list.
- If desired, enter a comment in the text box.

**Staff Section**

Use this section to perform staff-related functions.

- Click the [Click Here](#) link to add a case note.
- Click [Assign Staff](#), [Assign Group](#), or [Assign Me](#) to perform case assignment.
- Click **Save** to secure your edits or **Cancel** to escape.

## ***Create Credentials***

When staff clicks the [Create Credential](#) link within the WIOA section of the Programs Tab screen, they will manage two sections (as shown below) to document the customer's attainment of a training- or schooling-related credential. System configuration settings control whether (and where) the system displays this link.

**Note:** *Staff may enter credential attainment data up to one year from the individual's program exit date.*

**General Information Section**

To complete this section of the credential record, staff simply confirms/selects their office location. The system prefills the other information and displays it as "read only."

General Information

Program:	WIOA
Application Number:	160341636
Name:	Marie, Ann
Application Date:	6/8/2017
Program Participation Date	4/19/2018
Exit Date:	Not Applicable
Maximum date to record after exit:	Not Applicable
* LWIA/Region:	<input type="text" value="None Selected"/>
* Office Location:	<input type="text" value="Select an LWIA/Region"/>

General Information Section

### Credential Information Section

Staff performs data entry in the Credential Information section to be used for federal reporting requirements.

Credential Information

* Credential Received:	<input type="text" value="None Selected"/>		
Other Credential:	<input type="text"/>		
Credential Verification:	[ <a href="#">Verify</a>   <a href="#">Scan</a>   <a href="#">Upload</a>   <a href="#">Link</a> ]		
* Date Credential Received:	<input type="text" value=""/>	(mm/dd/yyyy)	<input type="text" value="Today"/>
Associated to Activity:	[ <a href="#">Search Activities</a> ]		

Credential Information Section

Staff performs the following steps to complete this credential attainment record:

- Select the credential achieved by the individual.
- (Optional) Enter the credential name if staff selected “Other” as the credential received.
- Click [Verify](#) to select a desired verification document.
- Enter the date the individual received the credential.

### Create Entered Employment

If an individual enters employment while still receiving WIOA services, staff may click the [Add/Edit Entered Employment](#) link (see sample below) from the Programs tab screen to record details.

Youth Goals	
☐ Credentials	1
☐ Add Employment	0
<a href="#">Add Entered Employment</a>	
There are no records to display.	
☐ Closure	N/A
☐ Exit / Outcome	N/A
☐ Follow-ups	0

*Add Entered Employment Link*

Staff use this form to record employment details which may be used for a variety of reasons, including federal reporting and provider contract performance review.

**Note:** *Your system's configuration settings may not include this service option.*

To record employment details for the individual, staff click the Add/Edit Entered Employment link from the Programs tab screen. The form is divided into two sections: an Employer Information section and a Job Information section (as shown in the following figure).

Add/Edit Employer

**Known employer data will display for autofill selections as you type the employer name.**

### Employer Information

[Search Individual Employment History](#) [Select from](#)

\* Employer Name: 

H & R Block - Brandon, FL 33511 (911 E Bloomingdale Ave) 813.655.9351  
 H & R Block Skylake - North Miami, FL 33161 (12510 NE 7th Ave) 305.949.7320  
 H & R Block-Premium - Fort Myers, FL 33907 (15050 Elderberry Ln) 239.985.9500

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

Employment verification form signed by t

Employer FEIN:

Address Line 1:

Address Line 2:

City:

State/Province:

Zipcode:

Find Zip Code: [\[ USPS \]](#)

Country:

Industry Code (NAICS): [Search for NAICS Code](#)

Industry NAICS Code:

Industry NAICS Description:

\* Primary Employer Contact Name:

\* Primary Employer Contact Phone Number:  -  -  Ext.

Primary Employer Contact Email:

Is this employer a federal contractor?  Yes  No

### Job Information

\* Job Title:

\* Occupation:

\* Is this a green job?  Yes  No

\* Hours Worked per Week:

\* Hourly Wage:

\* Job Start Date:

Job End Date:    Currently Employed

Reason for Leaving:

Additional Information on reason for leaving:

---

\* Is this Entrepreneurial and/or Self-Employment?  Yes  No

\* Is this a Registered Apprenticeship?  Yes  No

\* Is this active Military Service?  Yes  No

\* Is this considered Non-Traditional Employment?  Yes  No

Is this considered Training Related Employment?

Add to Employment History:  Yes  No

*Entered Employment Page*

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► **To complete employment details:**

- 1 In the Employer Information section, enter the **Employer Name**. A verify link to the right of the field box, [Verify Employer Name](#), will require the staff member to choose the correct type of documentation for verifying the employment.  
**Note:** *If the employer is system-registered, staff may click the [Employer Search](#) link to search for and select the desired employer. The system will pre-fill most of the Employer Information section.*
- 2 Enter the **Address** and **City** of the employer and choose the correct **State** and **County** from a drop-down list.
- 3 Enter the **ZIP code** of the employer. Two help links are available if the ZIP code is not readily known: [Search for ZIP](#) and the USPS website URL.
- 4 Select the correct **Country** from a list of drop-down choices.
- 5 Enter the employer contact name, phone number, and email address (if available).
- 6 In the Job Information section, enter the **Job Title** in the field provided.
- 7 Select the occupation of the job by clicking the [Select Occupation](#) link. This will take staff to an O\*NET search screen which allows the staff four different search options to locate the job occupation classification.
- 8 Enter the **Hours Worked**, **Hourly Wage at Exit**, and **Job Start Date** information.
- 9 If the individual has already left the employer, enter the **Job End Date** and select the appropriate **Reason for Leaving** from the drop-down choices.
- 10 If the individual is still working for this employer, check the **Currently Employed** checkbox.
- 11 Enter the job duties in the free-form text box. Staff can either enter this information manually or click the [Insert Occupational Description](#) link, and an O\*NET occupational description will pre-fill the text box. Staff can edit this O\*NET description, use the [Spell Check](#) link to review any spelling errors, or click the [Clear Text](#) link to start over.
- 12 Staff must click the appropriate radio buttons to denote if the individual is receiving fringe benefits, if the job is covered by unemployment compensation, and if the job is considered non-traditional employment. Based on the occupation entered in this section, some of this information may already be pre-determined by the system.
- 13 Confirm if this job is considered **Training Related Employment**. Staff permissions determine if this pre-filled information can be overridden.
- 14 Click the **Save** button to save the information.

When the screen refreshes, a record of the job will appear in a table, similar to the following figure. Here, staff can click the [Delete](#) link in the Action column to delete the job information or [Edit](#) to make any changes.

<a href="#">Add/Edit Entered Employment</a>					
Employer	Start/End Dates	City	Job Title	Primary Employer	Action
H & R BI	11/2015 - Present	Brandon	Tax Preparer	No	<a href="#">Edit</a> <a href="#">Delete</a>

*Completed Employment Form*

**Note:** *The information entered here can also carry over to the employment history section of the Background Wizard and the WIOA Case Closure form.*

## Enrollment Closure

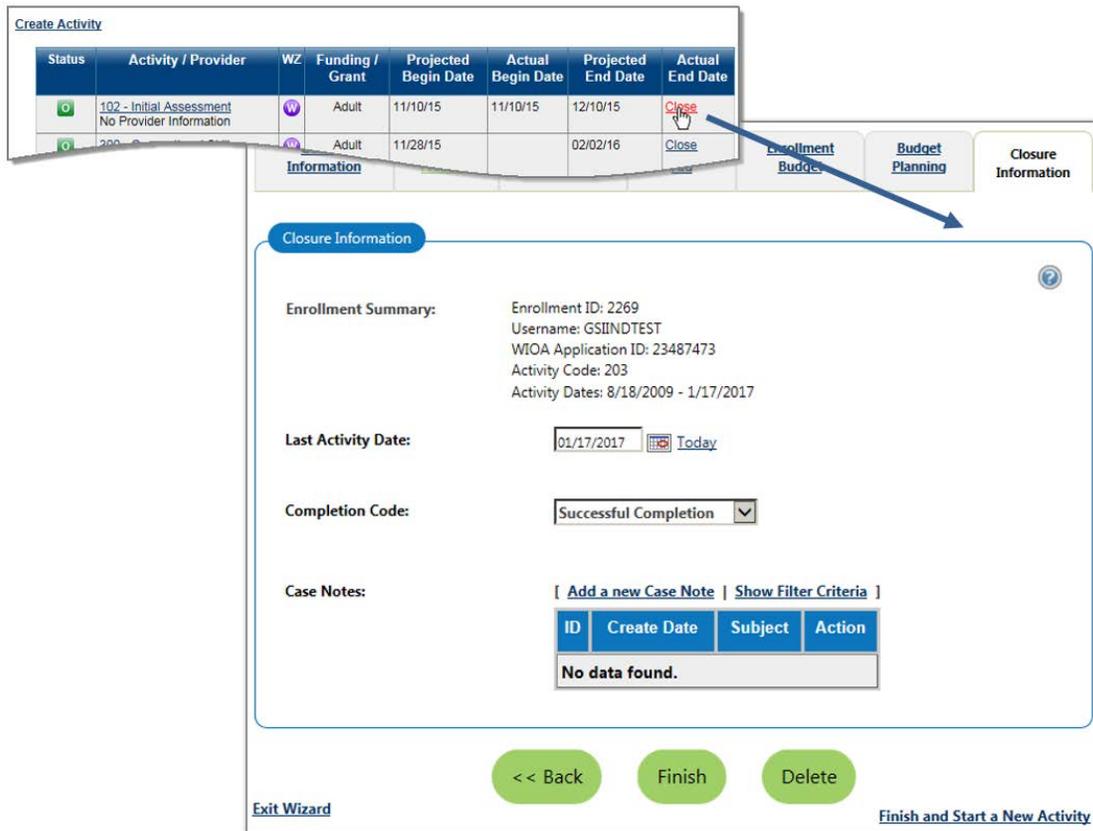
Although the primary means for WIOA program exit relies on the soft exit process, staff may complete a WIOA Case Closure or a WIOA program outcome. For details of each, see the topics that follow. In order to do so, however, the system requires that all open WIOA enrollment activities be closed. If staff attempt to complete either form with open activities, the system prompts staff by displaying pop-up alerts similar to the following:



*Open Activities Alert Messages*

### ► To close any open WIOA activities from the Programs tab:

- Click the Close link for the desired activity. The system will display the Enrollment Closure Information screen, whose display items differ based on services that could lead to credential attainment.



**Create Activity**

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
○	102 - Initial Assessment No Provider Information	W	Adult	11/10/15	11/10/15	12/10/15	<a href="#">Close</a>
○	200 - ...	W	Adult	11/28/15		02/02/16	<a href="#">Close</a>

**Enrollment Closure Information**

**Enrollment Summary:**  
 Enrollment ID: 2269  
 Username: GSINDTEST  
 WIOA Application ID: 23487473  
 Activity Code: 203  
 Activity Dates: 8/18/2009 - 1/17/2017

**Last Activity Date:** 01/17/2017

**Completion Code:** Successful Completion

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

ID	Create Date	Subject	Action
No data found.			

[<< Back](#) [Finish](#) [Delete](#)

[Exit Wizard](#) [Finish and Start a New Activity](#)

*Activity Enrollment Closure Information Screen*

From the enrollment Closure Information tab:

- Record the activity's last (actual end) date. Do not use future dates.
- Click Select Completion Code to record the status of the activity.
- Click the Add a New Case Note link, if desired.

- Click **Finish** to secure your edits. The system will display the updated Programs tab.

If the WIOA activity being closed could lead to credential attainment, the system would display a screen similar to the figure shown below. Staff perform the following:

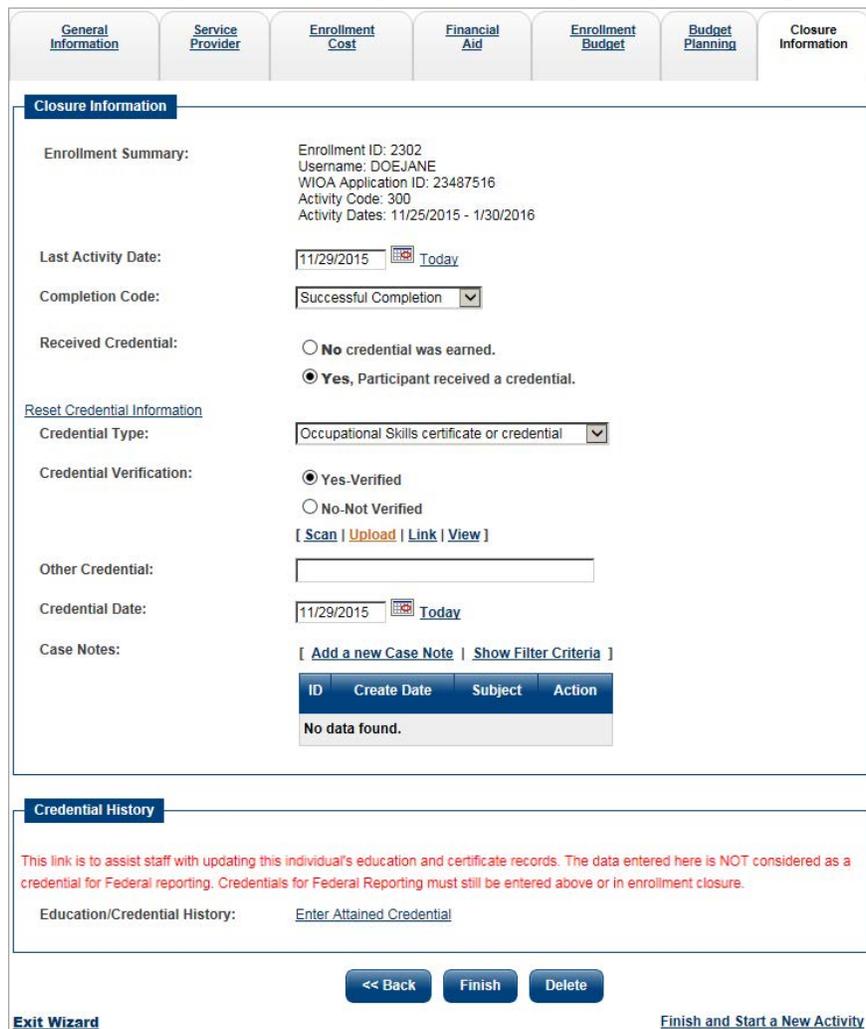
- Record the activity's last (actual end) date. Do not use future dates.
- Click Select Completion Code to record the status of the activity.
- Select whether the individual received a credential.

**Note:** Staff may record credential attainment using the WIOA Case Closure form, if not attained at this time.

- Select the appropriate credential verification item.
- Click Select Credential Received to record the credential type (see sample below).

**Note:** If you select Other, enter details in the Other Credential text box.

- Record the date the individual attained the credential.
- Click the Click Here link to add a case note.
- Click **Save** to secure your edits. The system will display the updated Programs tab screen.



The screenshot shows a web application interface for 'Enrollment Closure Information'. At the top, there are navigation tabs: General Information, Service Provider, Enrollment Cost, Financial Aid, Enrollment Budget, Budget Planning, and Closure Information. The 'Closure Information' tab is active.

**Closure Information**

Enrollment Summary: Enrollment ID: 2302  
Username: DOEJANE  
WIOA Application ID: 23487516  
Activity Code: 300  
Activity Dates: 11/25/2015 - 1/30/2016

Last Activity Date: 11/29/2015 [Today]

Completion Code: Successful Completion

Received Credential:  No credential was earned.  
 Yes, Participant received a credential.

Reset Credential Information

Credential Type: Occupational Skills certificate or credential

Credential Verification:  Yes-Verified  
 No-Not Verified  
[ Scan | Upload | Link | View ]

Other Credential: [Text Box]

Credential Date: 11/29/2015 [Today]

Case Notes: [ Add a new Case Note | Show Filter Criteria ]

ID	Create Date	Subject	Action
No data found.			

**Credential History**

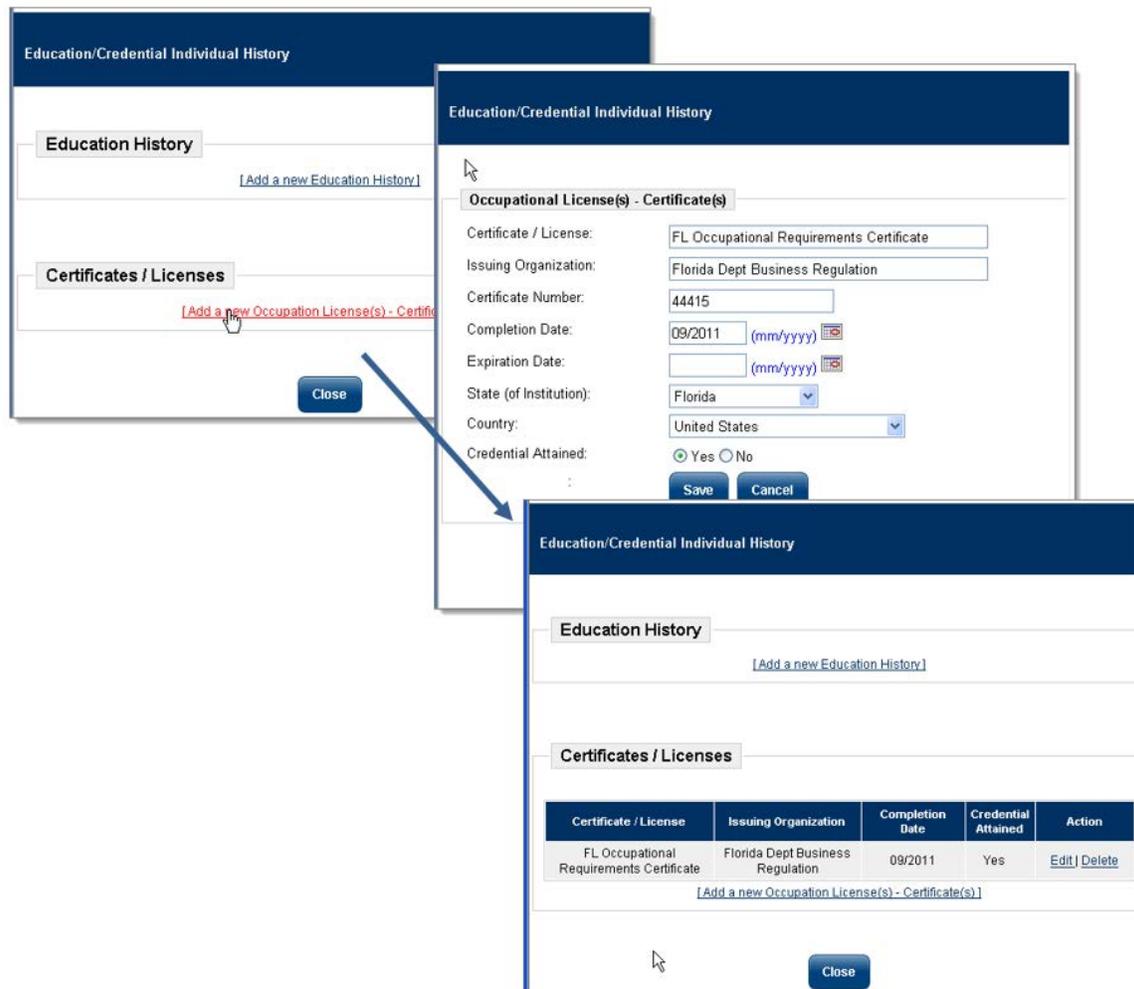
This link is to assist staff with updating this individual's education and certificate records. The data entered here is NOT considered as a credential for Federal reporting. Credentials for Federal Reporting must still be entered above or in enrollment closure.

Education/Credential History: [Enter Attained Credential](#)

Navigation buttons: << Back, Finish, Delete

Exit Wizard Finish and Start a New Activity

Enrollment Closure Information Screen – Credentialing



*Enrollment Closure Information Screen – Credentialing (Continued)*

## ***WIOA Enrollment – Reset Options***

Some members may have editing options allowing them to edit WIOA activity records (if they have the line-item privileges set from the Admin system). If staff has these privileges, they may perform the following:

- Re-open a closed WIOA activity record
- Reset an activity's actual end date
- Reset the completion status
- Reset credential attainment status
- Reset Youth diploma and certificate status
- Reset Youth school status
- Void an activity (except the first *federal* program enrollment)

**Note:** *Your system may not have the configuration settings in place for these reset options.*

► **To complete any of these edits:**

- From the individual's Program's tab screen, click the Close link for the desired WIOA enrollment record.

**Create Activity**

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	<a href="#">105 - Job Finding Club Satellite Services</a>		Adult	10/04/11	10/04/11	10/04/11	<a href="#">Close</a>
 Currently Funded	<a href="#">300 - Occupational Skills Training - Approved Provider List (ITA) GSI Test Provider</a>		Adult		10/04/11	10/26/11	<a href="#">Close</a>
	<a href="#">218 - Internships GSI LJ Provider - Pinellas</a>		Adult	10/10/11		12/16/11	<a href="#">Close</a>

Program Enrollment Record, Selecting Activity to Close

 Currently Funded	<a href="#">300 - Occupational Skills Training - Approved Provider List (ITA) GSI Test Provider</a>		Adult	10/03/11	09/26/11	11/18/11	<a href="#">Close</a>
	<a href="#">115 - Resume Preparation Assistance Satellite Services</a>		Adult	09/22/11	09/22/11	09/22/11	<a href="#">09/22/11 Unsuccessful Completion</a>

**Closure Information**

Enrollment Summary: Enrollment ID: 2430604  
 Username: JAMES  
 WIOA Application ID: 16202648  
 Activity Code: 102  
 Activity Dates: 9/02/2015 - 9/22/2015

Last Activity Date:

Completion Code:

Received Credential: Not Applicable.

Case Notes:

ID	Create Date
No data found.	

Resetting Activity Closure Status

► **To re-open the activity (and thus reset the last activity date, completion code, and/or credential attainment status):**

- Enter the last activity date.
- Click Select Completion Code, and reselect from the drop-down list, to remove/reset the previous Completion Code value.
- Click **No** to indicate a credential was not attained (if applicable).
- Click **No – Not Verified** if you selected *No* in the previous step (if applicable).
- Click Select Credential Received, and reselect from the drop-down list, to remove/reset the previous Credential Received value (if applicable).
- Click **Finish**. The system will display the updated Programs tab screen, a sample of which follows:

**Note:** Some reset menu options may include “Void.” This edit type may NOT be used for the first enrollment service, regardless of the associated federal program. Depending on

*system configuration, an Administrator may have the rights to change the status of the first enrollment service so that the staff member can void that service/activity.*

## **WIOA Case Closure**

The WIOA Case Closure tab is essentially a Case Management tool. When all services for WIOA are completed and closed, the system will start the 90-day countdown to perform a soft-exit routine for the customer. Any new services can still be entered until the soft-exit occurs (which will start the 90-day countdown).

If all WIOA activities and services are completed, staff can complete the Case Closure form to stop the delivery of any new *planned* services for the individual. This will immediately stop the addition of any other WIOA services. The 90-day countdown to perform a soft-exit for the customer continues, whether or not staff complete the Case Closure form. Staff will be prompted to collect any employment data (i.e., Entered Employment), and the basic school status at closure. This information is for the staff member; the system does not move it into performance measures.

The performance measures for employment do not start until the individual is soft-exited from the program. Then it is up to staff to “collect” data in one of two ways:

- **Quarterly Wage Files** – Although always a quarter behind, these USDOL files managed state by state provide the most sought after information to determine whether the customer is employed 2<sup>nd</sup> quarter and 4<sup>th</sup> quarter after the exit quarter (the new employment measures for WIOA, Wagner-Peyser, Adult Education, and Vocational Rehab).
- **Supplemental Data** – This is data entered by staff, using the quarterly Follow Up forms to further document employment details (after program exit), as well as other forms such as the Credential Attainment form.

Whether staff will create closures as soon as all planned services are completed for the individual, may depend on the state or regional policies for OneStop staff.

In deciding to use the Closure form, keep in mind that a WIOA Case Closure:

- Stops any further entry of planned services
- Allows entry of follow-up activities
- Allows staff to record employment information prior to soft-exit
- Allows staff to collect other via separate option-bar links (e.g., Credentials or Follow-ups, as shown in the figure below)

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
Success	301 - On-The-Job Training GSI IFT Provider A	W	Adult	11/13/2017	11/13/2017	11/13/2018	12/14/2018 Successful Completion
Success	300 - Occupational Skills Training - Approved ETP GSI State AU	W	Adult	11/13/2017	11/13/2017	02/11/2018	12/14/2018 Successful Completion
Success	101 - Orientation's No Provider Information	W	Adult	11/13/2017	11/13/2017	11/13/2017	11/13/2017 Successful Completion

Measurable Skills Gain: 0

Educational Functioning Level for Measurable Skills Gain: 0

Training Justification: 0

Credentials: 0

Youth Goals: 1

Partner Programs: 0

Closure: N/A

Exit / Outcome: N/A

Follow-ups: 0

[Create Closure](#)

Once a closure is entered, some option-bars (like Credentials) can still be used to enter data needed at programs exit. But you cannot add activities, after creating a closure.

*Create Closure Link*

**Note:** After you complete a Closure form, if the individuals wants to become “reinstated” before the soft-exit occurs, authorized staff must delete the Closure Form, which would allow staff to continue to document the delivery of program services for the customer.

Once a WIOA case closure has been created, a new program activity cannot be created for this application. However, WIOA follow-up services may be recorded. For details, see the topic “WIOA Follow-Up Services”. The WIOA case closure must be deleted before a new program activity (non-follow-up activity) may be created, and follow-up service codes will no longer be available.

The WIOA case closure interface will become available when each valid activity has an actual end date. If there are activities with no *actual start date*, the WIOA case closure CANNOT be created.

The WIOA case closure interface will not be available for data entry when there is an open activity (defined as a valid activity with an actual start date but no actual end date). It will not be available for an open, projected activity (defined as having a projected start date, a projected end date, no actual start date, and no actual end date).

A voided activity will have an actual end date, but no actual start date. A voided activity will not prevent a case closure from being created.

Notification

The individual has open activities. Unable to create closure.

Close

Message from webpage

The individual has open WIOA Youth Goals. Please close all youth goals before exit.

OK

*Prompts display for Open activities or Youth Goals that must be closed first*

► **To create a case closure:**

- Click Create Closure from the Programs tab.

The WIOA Closure form displays, unless activities or goals are still open.

**Note:** *If activities remain open, pop-up alerts display the need to close activities first. If open Youth Goals exist, an alert will also indicate that all Youth Goals must be closed. Click **OK** to clear alert, and manually close each open activity. For details, refer to the “Enrollment Closure” topic.*

- In the General Information area, record or confirm your one-stop office location.
- In the Outcome Information area, record appropriate school status at exit, placement data, and/or credential attainment information. This may be necessary if no credential/placement was previously identified when closing the WIOA enrollment activity.

**Note:** *If credential information was recorded when staff closed the activity, the system will display details in the separate Credentials area (the gray option-bar above the Closure bar). The Credential is not part of the Closure form.*



**General Information**

Username: GSIBMADLUT  
 Name: Pitt, Brad  
 Last service date: 12/17/2018  
 Exit Date:  
 Exit Reason:  
 LWIA: 13 Brevard Workforce Development Boa  
 \* Office Location: CareerSource Brevard - 4560 - Palm Ba  
 Case closure date: 12/17/2018  
 \* Accountability Closure/Exit Status: Neither condition applies

**Employment Information**

\* Entered Employment: No  
 No employers available.  
[\[ Add Employer \]](#)

**Staff Information**

[ Add a new Case Note | Show Filter Criteria ]

ID	Create Date	Subject	Action
			Edit

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

Save Cancel Delete

**Outcome Information**

School Status at Exit: None Selected  
[\[ Verify | Scan | Upload | Link \]](#)

WIOA Case Closure Form

- If you want to identify employment, associated with the Closure record, select Yes from the **Entered Employment** field in the Employment Information area.  
**Note:** *If an employer already exists, and is recorded for the individual, then you can select Yes, Recall Employer from the **Entered Employment** field. This will let you pick the employer in the next step.*
- To add a new employer, click the Add Employer link to open/expand the Add/Edit Employer area.
  - Record all required information in the displayed Employer Information area.
  - Record all required information in the displayed Job Information area.

- Click the **Save** button.

The new employment is displayed in the Employer table.

**Note:** *This is identical to employment entry in the topic “WIOA Follow-Up FormsWIOA Follow-Up” and “Create Entered Employment”.*

- In the Staff Information area, use controls to add case notes or assign a case manager, if applicable.
  - Click the [Add a Case Note](#) link to add a case note, if applicable.
  - Use the Case Manager link to identify the appropriate staff person with this case closure. (Click Assign Staff, Assign Group, or Assign Me to conduct case assignment.)
- Click **Save** to save your edits and complete the closure.

Upon successfully completing the WIOA Case Closure form, the system displays the Closure as a link in the updated Programs tab screen (as shown below).

Credentials	
Youth Goals	0
Partner Programs	0
Add Employment	1
<b>Closure</b>	<b>12/17/2018</b>
<a href="#">Edit Closure</a>	
Closure Date: 12/17/2018	
Exit / Outcome	N/A
Follow-ups	0

*Updated Programs Tab Showing WIOA Case Closure*

Completing the WIOA Case Closure form also enables staff to record WIOA follow up services ('F' codes), as described in the next topic.

**Note:** *You can reopen the Closure form by clicking the link, and use the **Delete** button (at the bottom of the form) to cancel and delete the closure. The **Delete** button is available only after you save the form and the Staff Information tab. By deleting the closure, the individual may continue to receive WIOA services. The **Delete** button is disabled when an Outcome/Exit record exists.*

## WIOA Follow-Up Services

As a result of successfully completing the individual's WIOA Case Closure, thereby stopping planned service delivery, staff can now record WIOA follow-up services. This process is covered in the topics “WIOA Core Service Enrollment” and “Enrolling in WIOA intensive/Training Services”. The difference is that the only service activity code available is *Follow services* (“F” codes).

### Follow-Up Services and Soft Exits

Follow-up services are not reported federally, and will not prevent the individual from completing program soft exit.

**Note:** *If the customer must resume planned service delivery before soft exit occurs, authorized staff can delete the WIOA Case Closure. Check to ensure whether your program policy supports this behavior.*

Although WIOA follow-up services might have a limited duration (most cannot exceed 90 days), fund tracking capabilities exist for fundable follow-up services (for example, support service delivery). Staff

documents fundable follow-up services using the Enrollment form the same way they document fundable training services. Because WIOA customers can receive follow-up services for up to one year, it is not uncommon for program exit to occur *before* the completion of WIOA follow-up services.

To select an activity, click on an activity link below. Activities that do not have a link mean there are no programs offered for the selected customer group and / or region.

Activity Code	Activity Title	Provider Type
F01	<a href="#">Referral to Community Resources</a>	PS - Office Services
F02	<a href="#">Referral to Medical Services</a>	PS - Office Services
F03	<a href="#">Tracking Progress on the Job</a>	PS - Office Services
F04	<a href="#">Work Related Peer Support Group</a>	PS - Other
F05	<a href="#">Assistance securing better paying job</a>	PS - Office Services
F06	<a href="#">Career development and further education planning</a>	PS - Office Services
F07	<a href="#">Assistance with Job/Work Related Problems</a>	PS - Office Services
F08	<a href="#">Adult Mentoring</a>	PS - Other
F09	<a href="#">Tutoring</a>	PS - Training Non-ITA
F10	<a href="#">Leadership Development</a>	PS - Training Non-ITA
F11	<a href="#">Other Follow Up Service, not classified</a>	PS - Office Services
F12	<a href="#">SS-Transportation</a>	SS - Transportation
F13	<a href="#">SS- Purchase work related uniforms/attire</a>	SS - Other
F14	<a href="#">SS-Purchase work related tools</a>	SS - Other
F15	<a href="#">SS-Housing Assistance</a>	SS - Shelter
F16	<a href="#">SS-Utilities</a>	SS - Other
F17	<a href="#">SS-Dependent Care</a>	SS - Child Care
F18	<a href="#">SS-Medical</a>	SS - Medical
F19	<a href="#">SS-Incentives/Bonus</a>	SS - Incentives

Close Window

*WIOA Follow Up Activity Code Selection List*

System configuration settings control the soft exit process for client records, and may occur as a single or combined event. The *single* soft exit process applies to one program at a time, regardless of the number of federal programs the system supports, by automatically closing the client's enrollment record when the customer has not received a planned service in that program for at least 90 consecutive days. The *combined* soft exit process occurs when an individual fails to receive planned services for at least 90 consecutive days for *all* federal programs maintained within the system.

In each instance (whether the system executed the *single* or *combined* soft exit procedure), it will display as the client's exit date the most recent end date for all relevant program services within the current enrollment period. This date might be the services actual end date (if recorded) or the service's projected end date (if the actual end date is not recorded).

The system's ability to perform the soft exit process can be hampered, however, when the client receives a program service (either staff- or self-assisted) that re-calculates the 90-day countdown. For example, if the WIOA customer conducts a job search using the system when WIOA planned service delivery has ended, and if the customer has an active, open Wagner-Peyser (WP) enrollment record, the system will restart the 90-day countdown required to conduct program soft exit.

This situation can account for a prolonged WIOA enrollment for the customer (who will remain open and active in WIOA and WP, minimally), simply because they received a Wagner-Peyser program service that extends the soft exit event. Staff should check with their supervisors/managers to know which WP program services will postpone the soft exit procedure in the system.

## **WIOA Outcome - Hard Exit**

According to provisions established by the federal government, staff need only create a WIOA outcome (or hard exit) if the individual satisfies one of the established global exclusions. Those global exclusions are: death, institutionalization, reservist called to active duty, medical need, family care needs, or, for youth, sent to a group home facility.

**Note:** *Completing a program exit and citing one of these global exclusions as the reason will NOT count such participants in Common Measures for performance tracking purposes.*

If an individual does NOT satisfy one of these global exclusions, and if custom exit reasons are not configured for your system, federal policy requires the individual undergoes a *planned* soft exit from the WIOA program. That is, if the individual has not received a WIOA program service for at least 90 consecutive days, the system will automatically create a soft exit form.

**Note:** *Your business rules may extend the minimum non-service period required for soft exit beyond 90 consecutive days.*

When staff completes the WIOA Outcome form, the individual’s participation in the WIOA program has terminated, and planned services will no longer be delivered. As a result, the system will not display the quarterly follow-up schedule for WIOA, because participants who exit the program due to a global exclusion will not be reported federally.

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	<a href="#">414 - ***Basic Skills Training</a> CareerSource Central Florida		Youth	N/A	02/07/2017	02/06/2018	<a href="#">Close</a>
	<a href="#">412 - ***Objective Assessment</a> CareerSource		Youth	N/A	02/07/2017	02/06/2018	<a href="#">03/25/2016</a> Successful Completion

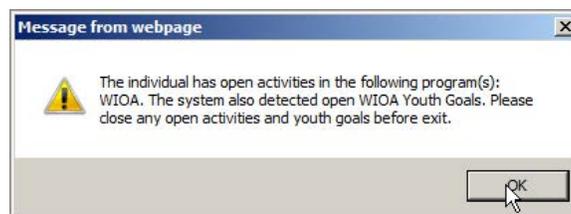
Measurable Skills Gain	0
Partner Programs	0
Literacy & Numeracy	0
Credentials	2
Add Employment	1
Closure	05/02/2017
Exit / Outcome	N/A
<a href="#">Create Exit/Outcome</a>	
Follow-ups	0

[Create Exit/Outcome Link](#)

► **To manually terminate participation in one WIOA program (create a hard exit):**

- Click the [Create Outcome](#) link on the Programs tab (shown above).

The system will check to ensure that all WIOA activities have been closed properly. If any remain open, the system will display an alert.



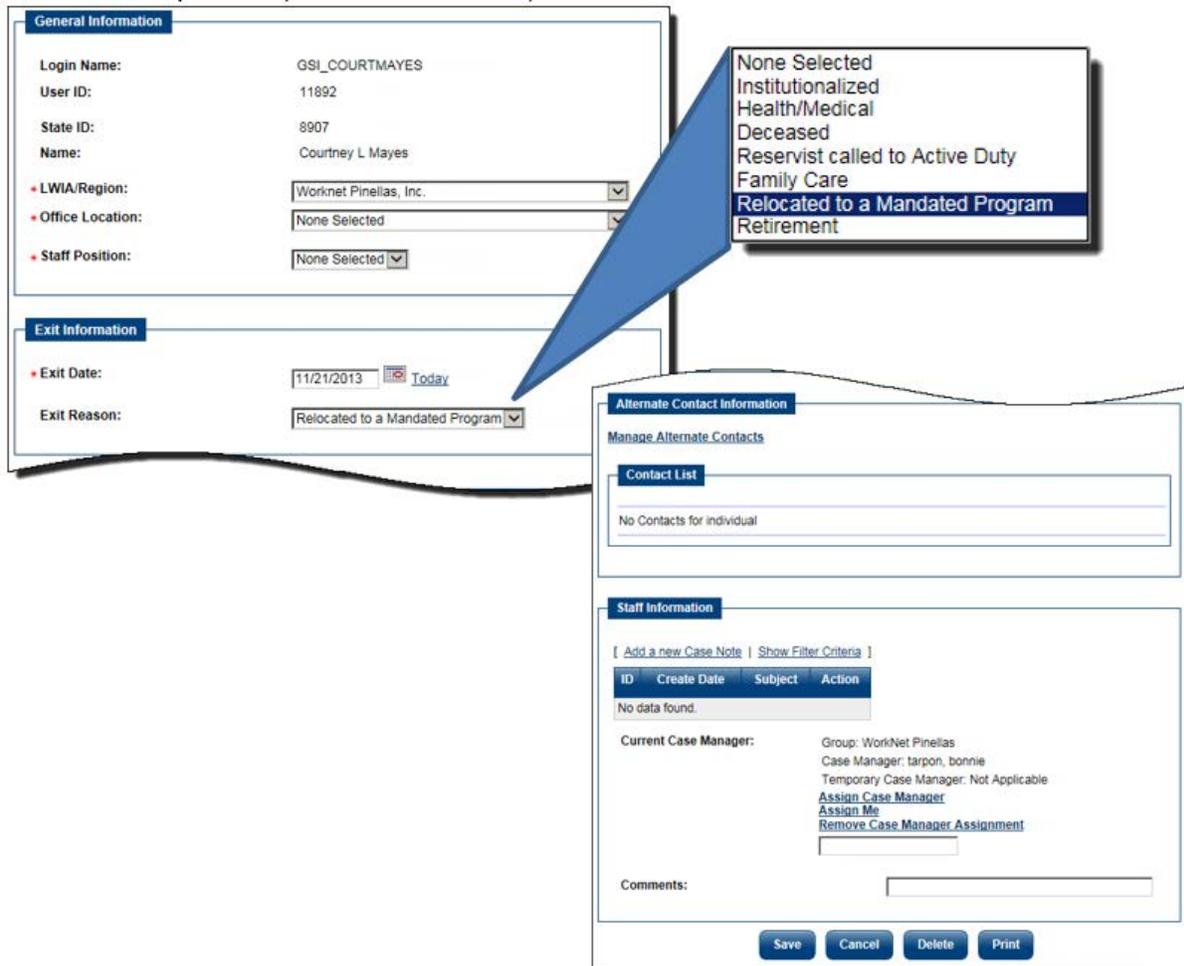
[Open WIOA Activity Alert Message](#)

To continue, staff must manually close out open WIOA activity services. For assistance, see the topic “Enrollment Closure”.

**Note:** If the youth goals were included, a message will also indicate that those must be closed.

Otherwise, the system will display the Outcome form. This page will help you gather WIOA Exit/Outcome information (as shown in the following sample figure).

- Use the General Information area to make selections from the drop-downs.
  - LWIA (region)
  - One-stop office
  - Staff position (Staff, DVOP, LVER)



The screenshot displays the WIOA Outcome Form with three main sections: General Information, Exit Information, and Staff Information. A callout box points to the 'Exit Reason' dropdown menu, which is open to show options: None Selected, Institutionalized, Health/Medical, Deceased, Reservist called to Active Duty, Family Care, Relocated to a Mandated Program (highlighted), and Retirement.

**General Information**

Login Name: GSI\_COURTMAYES  
 User ID: 11892  
 State ID: 8907  
 Name: Courtney L Mayes  
 LWIA/Region: Worknet Pinellas, Inc.  
 Office Location: None Selected  
 Staff Position: None Selected

**Exit Information**

Exit Date: 11/21/2013 Today  
 Exit Reason: Relocated to a Mandated Program

**Alternate Contact Information**

Manage Alternate Contacts

Contact List

No Contacts for individual

**Staff Information**

[ Add a new Case Note | Show Filter Criteria ]

ID	Create Date	Subject	Action
No data found.			

Current Case Manager: Group: WorkNet Pinellas  
 Case Manager: tarpon, bonnie  
 Temporary Case Manager: Not Applicable  
[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)

Comments:

Buttons: Save, Cancel, Delete, Print

*WIOA Outcome Form with General, Exit, and Staff Sections*

Use the Exit Information section to record details of the individual's program termination.

- Enter the individual's date of exit.
- Select an exit reason.
- Click the [Click Here](#) link to update the individual's list of alternate contact people.
- In Comments, type a brief description to further explain the exit reason.

**Note:** The comment you type will automatically become a system-generated case note.

Use the Staff Information section to perform staff-related functions.

- Click the [Click Here](#) link to add a case note.
- Click [Assign Staff](#), [Assign Group](#), or [Assign Me](#) to perform case assignment.

- Click **Save** to secure your edits or **Cancel** to escape.

**Note:** Using the **Delete** button to delete and outcome, depends on staff permissions.

## Deleting WIOA Outcomes

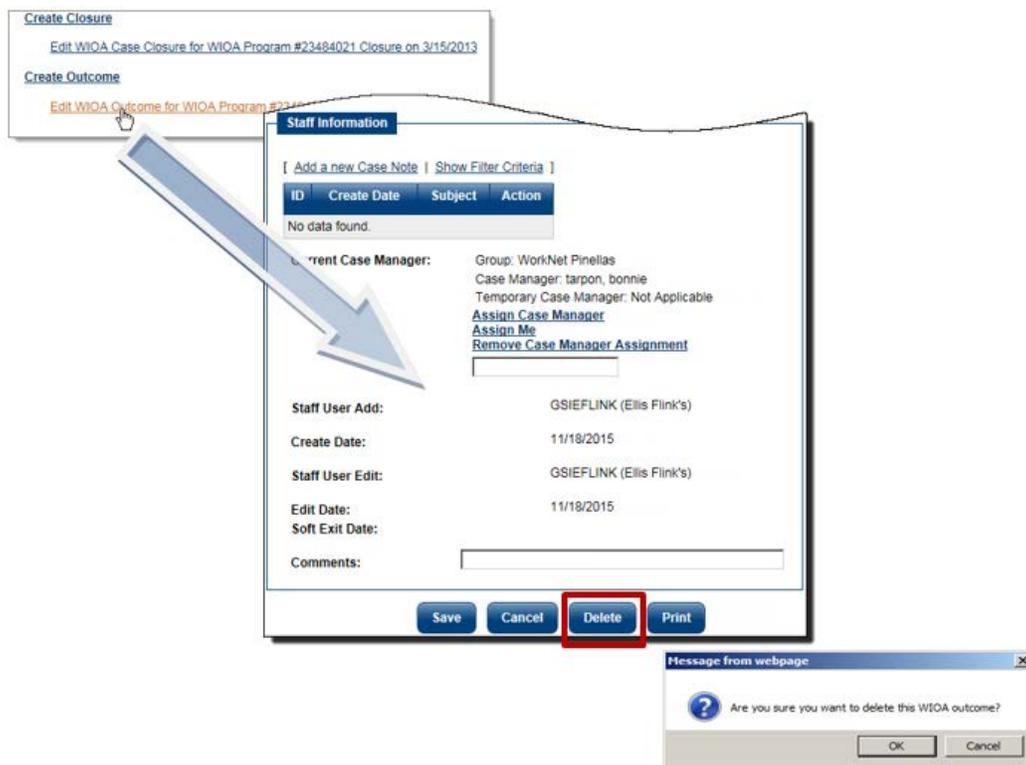
After creation of an outcome record, it is possible to delete a WIOA Outcome record (depending on your permissions).

If a WIOA outcome needs to be removed, after initial creation, the bottom of the outcome screen includes a **Delete** button.

### ► To delete the WIOA Outcome record:

- 1 Click **Delete** at the bottom of the Outcome page.

A confirmation button warns you that any other program outcome records will also be deleted (e.g., WIOA, TAA, and Wagner-Peyser).



*Delete Button on WIOA Outcome Screen*

- 2 Click **OK** on the displayed confirmation box.

If open applications or soft exit windows exist, the screen will displays messages. *Otherwise...*

The Programs tab is redisplayed with the WIOA Outcome record deleted. The WIOA Closure record will remain.

**Note:** *If the individual is co-enrolled in this program along with others (e.g., WIOA, TAA, Wagner-Peyser), you will received error messages on the screen indicating that an open application will prevent any deletes from occurring. If the staff member has permissions to confirm Outcome deletion and when there are equivalent Outcome records in the other programs, their Case Closure records will remain.*

You may also receive a message if the last valid activity date is within a “Soft Exit” window. Sample messages that may display, in red, are shown below.

- No program exits were deleted. The system found open applications or future applications that prevented any deletes from occurring.
- Soft Exit is not available as a selection until at least 91 days have passed since the last valid activity date.

## WIOA Follow-Up Forms

The primary purpose for the WIOA Follow-Up form is to assist staff in predicting federal performance and to collect data that may be used as supplemental sources for federal reporting. The system will not provide access to this tool until the individual has been officially exited from the WIOA program, either through the hard or soft exit process.

**Note:** A follow-up is NOT required for any individual who exited from the program due to one of the global exclusions.

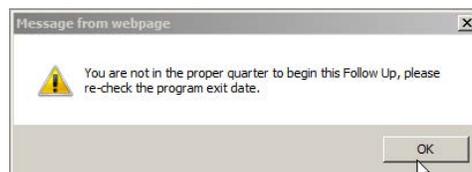
Create a Follow Up			
Quarter End Date	Date Complete	Status	Follow Up Type
9/30/2015	9/9/2015	Completed	<a href="#">First Quarter After Exit</a>
12/31/2015		Required	<a href="#">Second Quarter After Exit</a>
3/31/2016		Required	<a href="#">Third Quarter After Exit</a>
6/30/2016		Required	<a href="#">Fourth Quarter After Exit</a>

WIOA Follow-Up Form

Using the Programs tab screen, as shown in the following figure, you may create two types of WIOA follow-ups for the individual:

- Local (optional) follow-up by clicking [Create a Follow-Up](#)
- Federal (required) follow-up by clicking the appropriate *Follow-Up Type* link

Case managers can record follow-ups only in the current quarter for federal reporting requirements. The system does not allow federal follow-ups to be recorded outside the designated quarterly time periods. If you click a follow-up link prematurely, the system will display an alert (similar to the one shown below). The positive goal measurement is to have the individual employed by the second quarter after exit and still employed at the third quarter follow-up. Another positive measurement is attainment of educational credentials, which can be recorded up to three quarters after exit.



Improper quarter Alert Message

Each state sets its own threshold for the number of failed contact attempts that are required before attempts are discontinued.

As you work through the Follow-up form:

- Complete entries in each section.
- Scroll and proceed to the next section.
- When you have completed all sections, click **Save** at the bottom of the screen.

**General Information**

WIOA Follow-up: 1 - 1st Quarter after Exit 5 - Local Follow-up

Status: Required

User ID: MATTHEWSJ3450

Working With: JASMINE M MATTHEWS

Address 1: 4636 11TH AVE S

Address 2:

City:

State:

Zip Code:

County/Parish:

Country:

Prime Phone: 727 495 1841 Ext.

Alternate Phone: 727 520 2558 Ext.

This indicates the WIOA follow-up type (local vs. required).  
If staff clicks the Create Follow Up link (instead of the link for a quarter) a Local Follow-up is created, and indicated here.

**Alternate Contact Information**

[Manage Alternate Contacts](#)

**Contact List**

No Contacts for individual

System-set data based on WIOA Case Closure and/or WIOA Outcome

**Exit and Closure Information**

Exit Date: 06/30/2013

Employment Status: No Closure Employment Information

Attained Credential(s) at Enrollment:

Activity Code	Activity Description	Credential Description	Credential Date
409	***Job Shadowing	Work Readiness Certificate	07/08/2011
410	***Leadership Development Services	Work Readiness Certificate	07/08/2011

Attained Credential at Exit: Not Applicable

Youth Status at Exit: Not Applicable

Placement Status at Exit: Not Applicable

*General Info, Alternate Contact Info, Contact List, Exit and Closure Info Sections*

### General, Alternate Contact, Exit, and Closure

General Information should be complete and prefilled. You might want to update the individual’s alternate contact list.

Alternate Contact Information is the same Contact control used elsewhere. It lets staff add an alternate contact, if one needs to be identified as part of performing the follow up.

Exit and Closure Information is system-set based on data recorded in the WIOA Case Closure and/or WIOA Outcome (exit). If staff failed to record employment information when they completed a case closure, the system displays “No Exit Employment Information.” Otherwise the system displays employer details as recorded.

### Contact Attempts, and Follow-up Employment Information Areas

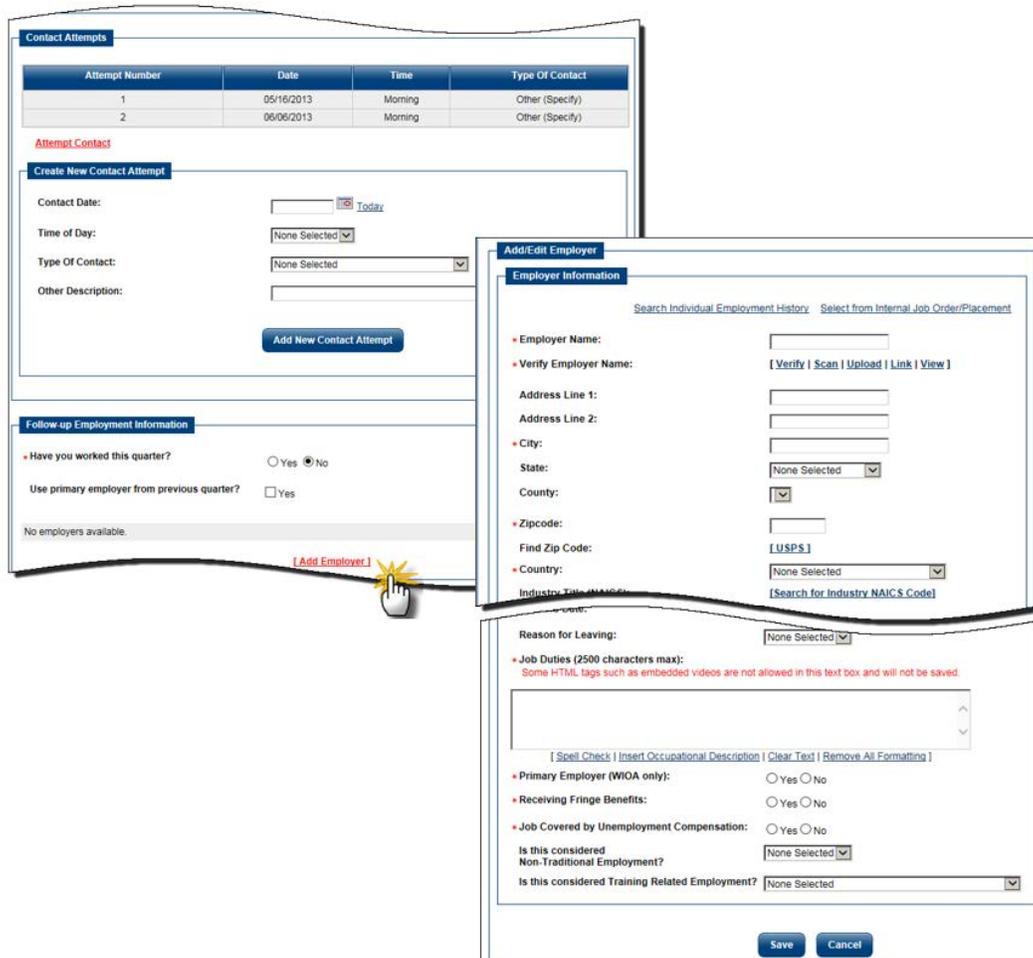
Adding Contact Attempts or adding Follow-up Employment Information requires clicking on a link to expand the area for the data entry fields. When data is entered and saved, it appears in a table (within that area of the screen).

► **To create New Contact Attempts:**

- Click the [Attempt Contact](#) link to open/expand a Create New Contact Attempt area.
- Record any contact attempts (failed or successful).
- Click the **Add New Contact Attempt** button.

The new contact attempt is displayed in the Attempts table.

**Note:** *Your site's business rules determine how many failed attempts must be recorded before the system automatically assigns "Cannot locate" as the Other Status at Follow Up.*



**Contact Attempts**

Attempt Number	Date	Time	Type Of Contact
1	05/16/2013	Morning	Other (Specify)
2	06/06/2013	Morning	Other (Specify)

**Create New Contact Attempt**

Contact Date:  Today

Time of Day:  None Selected

Type Of Contact:  None Selected

Other Description:

**Add New Contact Attempt**

**Follow-up Employment Information**

Have you worked this quarter?  Yes  No

Use primary employer from previous quarter?  Yes

No employers available.

**Add Employer**

**Add/Edit Employer**

Employer Information

Search Individual Employment History Select from Internal Job Order/Placement

Employer Name:

Verify Employer Name:  [ Verify | Scan | Upload | Link | View ]

Address Line 1:

Address Line 2:

City:

State:  None Selected

County:

Zipcode:

Find Zip Code:  [ USPS ]

Country:  None Selected

Industry:  [ Search for Industry NAICS Code ]

Reason for Leaving:  None Selected

Job Duties (2500 characters max):

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

[ Spell Check | Insert Occupational Description | Clear Text | Remove All Formatting ]

Primary Employer (WIOA only):  Yes  No

Receiving Fringe Benefits:  Yes  No

Job Covered by Unemployment Compensation:  Yes  No

Is this considered Non-Traditional Employment?  None Selected

Is this considered Training Related Employment?  None Selected

**Save** **Cancel**

*Attempt Contact and Add Employer Links*

► **To create Follow-up Employment Information:**

- Answer if individual worked in this quarter.
  - Check the **Yes** box if the individual worked for an employer from a previous quarter.
  - If **Yes**, verify the employer name.
- To add a new employer, click the [Add Employer](#) link to open/expand an Add/Edit Employer area.
- Record all required information in the displayed Employer Information area.
- Record all required information in the displayed Job Information area.
- Click the **Save** button.

The new employment is displayed in the Employer table.

- Continue to the next section for Credential Information.
  - Note:** *If this is followed for a Youth application, you may first see areas for Youth Placement, Diploma/Certificate, and Youth Follow-up Services.*
- Use the Credential Information section to record credential attainment information.
  - Select the credential type from the drop-down (or enter the type if it is another type of credential).
  - Enter/select the date.
  - Click Verify to confirm the information.
- Use the Update Education/Certificate History link if you need to update the history for the credential.

Credential Information

Enrollment Credential:

Activity Code	Activity Description	Credential Description	Credential Date
409	***Job Shadowing	Work Readiness Certificate	7/6/2011 12:00:00 AM
410	***Leadership Development Services	Work Readiness Certificate	7/8/2011 12:00:00 AM

Case Closure Credential: Not Applicable

Current Credential:

Other Credential:

Credential Date:

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

There is appropriate documentation in the case file.

[Update Education/Certificate History](#)

The link above is to assist staff with updating this individual's individual education and individual certificate records. The data entered here is NOT considered as a credential for Federal reporting. Credentials for Federal Reporting must still be entered above.

No credentials found in individual data.

No certificates found in individual data.

---

Current Status at Follow-up when previous data entry options are not performance indicators

Other Status at Follow-Up:

Other Description:

---

Contact Information

Actual Date of Follow-Up:

Contact Type:

Other (specify):

Comments:

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

ID	Create Date	Subject	Action
No data found.			

---

Staff Information

LWIA/Region:

One Stop Location:

Staff User Create: GSISOFTEXIT

Create Date: 09/29/2013

Staff User Edit:

Edit Date: 09/29/2013

*Credential Information, Current Status at Follow-up, Contact and Staff Info Sections*

- If previous data entry options are not performance indicators (e.g., closing a program because of transfer to other funding), use the drop-down or description field here to identify the type of status.

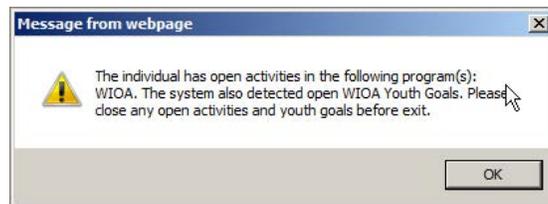
**Note:** A required WIOA follow-up schedule does not appear if the individual exited from WIOA due to a global exclusion. However, they can still select the link to [Create a Follow-up](#), and the selection matching the exclusion could be selected here.

- Select the actual follow-up date.
- Select the contact type.
- Enter and comments of case notes.
- Select or confirm your one-stop office location.
- Click the [Click Here](#) link to add a case note.
- Click **Save** to secure your edits and complete the follow-up.

## WIOA Outcome Form for Youth

The process by which WIOA youth leave the WIOA program is quite similar to that for WIOA adults and dislocated workers. For a process overview of the entire Outcome Form, see the topic “WIOA Outcome Form (Hard Exit)”.

In addition to open activities, the system ensures that any younger youth goals have also been closed before allowing program exit. If you click the [Create Program Outcome](#) link on the Programs tab, and at least one younger youth goal remains open, the system will display an alert similar to the following:



*Open Youth Goal Alert Message*

### ► To manually close out any open goals:

- 1 Click the open goal link(s).
- 2 Enter the actual end date, which cannot be greater than the system date.
- 3 Select the desired Attainment of Goal code.
- 4 Enter the close date for the goal.
- 5 Click Save to secure your edits.

Once you have closed all open WIOA activities (and goals for younger youth), you can manually exit the individual from the program. For details, see the topic “WIOA Outcome Form (Hard Exit)”.

**Note:** When a case is closed for youth, you should also close all goals, objectives, and plans. This includes literacy and numeracy records (full pretest/progress test/posttest).

## WIOA Follow-Up Form for Youth

The process by which you complete WIOA follow-ups for youth is quite similar to that for WIOA adults and dislocated workers.

The only addition for youth is that it contains three additional sections (between Follow-up Employment Information, and Credential Information sections). These three sections are the Youth Placement, Diploma/Certificate, and Youth Follow-up Services sections shown below.

**Youth Placement Information**

Exit Placement: Not Applicable

Previous Placement: Not Applicable

\* Current Placement:

Date Of Placement:  Today

[\[ Verify \]](#) [\[ Scan \]](#) [\[ Upload \]](#) [\[ Link \]](#) [\[ View \]](#)

---

**Diploma/Certificate**

Enrollment Diploma/Certificate:

No diploma or certificate records found.

Exit Case Closure Diploma/Certificate: Information Not Available

Exit Case Closure Diploma/Certificate Date:

\* Attained Diploma, GED/High School Equivalency Diploma or Certificate (not previously recorded):

Date Attained Diploma/Certificate:  Today

[\[ Verify \]](#) [\[ Scan \]](#) [\[ Upload \]](#) [\[ Link \]](#) [\[ View \]](#)

---

**Youth Follow-up Services**

Check all that apply:

- Transportation
- Child Care or Dependent Care
- Housing
- Referrals to other Community Resources
- Referrals to Medical Services
- Assistance with uniforms or other work attire and work related tools
- Tracking Progress on the Job
- Work Related Peer Support Group
- Assistance securing better paying job, career development further education
- Assistance with Work Related Problems
- Adult Mentoring
- Tutoring
- Leadership Development
- Other Services

*Youth Placement, Diploma/Certificate, and Youth Follow-up Services sections*

For details on all the other sections of the follow-up, see the topic “WIOA Follow-Up”.

This includes the sections for:

- General
- Alternate Contact
- Exit and Closure
- Contact Attempts
- Follow-up Employment Information
- Credential Information
- Staff Information