IN Career Connect
Training Instructor Guide

Day 1: Wagner-Peyser Case Management Training
https://trainingta2.geosolinc.com/vos18000000/vosnet/Default.aspx?responsive=true

Item	Activity	Overview	Details	User Guide
1 ☐	Perform Welcome / Opening Introductions	Lay out ground rules, review agenda, participant introductions, etc.	1. Introduce yourself to the class; allow each participant to introduce themselves. (It really helps break the ice!) 2. Summarize the training materials: ✓ *Training Agenda* (review content for each day) ✓ *Training Instructor Guide* (instructor bible; provides page references to user guides for more information. Red 'QRC' button indicates inclusion in Quick Reference Card for Staff) ✓ *Training Registration Templates* (enable participants to create similar profiles and record login details) ✓ *Quick Reference Card* for Staff (job aid) 3. Explain that user guide resources can be found under *Other Staff Resources*. 4. Explain the purpose of training; locate facility resources, such as bathrooms and vending machines; share class start/stop times and breaks. 5. Use the introduction to help promote excitement and to set reasonable expectations, including the following: ✓ *Indiana Career Connect* is a big system; don't expect to be an expert overnight. ✓ Train-the-Trainer (T3) training will primarily focus on primary system features that *most* staff will utilize. Geosol will conduct webinar training to focus on additional resources for "specialized staff."	

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			✓ Don’t wander ahead to explore system; stay together. ✓ Neighborly help is always welcome, should someone get lost. ✓ Encourage participants to relax and enjoy training! 6. Review browser requirements; allow cookies in security settings and add the URL as a trusted site to avoid any pop-up window issues. *[Est. Time: 20 mins]*	
2	Provide System Overview	Explain how the addition of case management modules in the existing IN Career Connect system will negate the need to share data with former, legacy systems. This was formerly accomplished via web services, so that staff didn’t have to perform duplicate data entry.	Explain the following: 1. IN Career Connect (ICC) system (aka, Virtual OneStop), will replace the state’s former system(s) for labor exchange, case management, fiscal tracking, and federal reporting. 2. ICC is a web-based system. Users only need a Web browser and an Internet connection to use it. 3. The system accommodates self-service modes for job seekers and employers, as well as staff-assisted modes for job seekers and employers. 4. Staff privileges determine the extent to which staff can utilize system features, and the degree to which staff can manage customer profile data. (*For example, the ability to view or modify a customer’s 9-digit SSN, to view just the last 4 digits, or to not view the SSN at all.*) 5. In the Training environment, staff training participants will have high privileges; in the LIVE system, staff may not necessarily have those same privileges. 6. All data entry occurs in real-time. The only batch updates that will occur are for UI (unemployment insurance) claimants. *This will be covered in more detail via webinar training when we cover Reemployment Services and Eligibility Assessment (RESEA) Grants.* *[Est. Time: 5 mins]*	

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3 ☐	Identify Home Page Features	Features and functions exist for both system-registered users and non-registered users (guests). *[Location: Home page]*	Identify and explain the following: 1. Individuals and employers enter their username and password and click **SIGN IN** to perform system login. 2. Individuals and employers create these credentials during system registration. 3. The system administrator creates and manages staff accounts and staff logins. 4. Individuals and employers may click the *En Español* link to immediately convert the system display to Spanish. 5. To manually perform system registration, individuals and employers click the *Not Registered?* link, select their user type, and follow the Registration Wizard prompts. *The class will perform individual and employer system registration on day 1.* 6. Registered individuals and employers may click the *Forgot Username/Password* link to receive automated login assistance. 7. If a user selects an option under Individuals, Employers, or Other Resources, they will enter the system as a guest with limited access. This is also true if the user conducts a job search from the Home page. *When guest users attempt to cross a defined threshold, such as applying for a job, or viewing candidate resumes, the system will prompt users to complete system registration. Otherwise, they will be unable to continue.* *[Est. Time: 5 mins]*	Staff User Guide Chapter 1 QRC
4 ☐	Perform Staff Login	Training participants enter the system using assigned staff logins. *[Location: Home page]*	1. Use training handout (*Registration Template*) to assign staff logins to participants. 2. Identify the URL is displayed in the Training Instructor Guide at the top of each new day. 3. Have participants log in to the system. 4. Encourage them to bookmark the site for easy access. 5. Ask participants to record their login information under the section Remember Your Login Information on page 5 of	Staff User Guide Chapter 1 QRC

Item	Activity	Overview	Details	User Guide
			the Training Registration Template document. 6. Explain that staff usernames are only for this week's training. DWD will coordinate alternate staff logins at a later time to continue practicing in the Training environment. 7. Confirm all training participants have successfully logged in before moving forward. *[Est. Time: 5 mins]*	
5 ☐	Introduce System Navigation	Explore basic design features of the Indiana Career Connect system. Instructor can click to demonstrate. *[Location: My Staff Workspace screen]*	Identify and explain the following: 1. Following system login, ICC will display a pop-up alert to the user if at least one unread message exists in their inbox. This is true for all user types. 2. The left navigation menu displays user-specific features. 3. Users can also click tab options along the top of the screen. 4. By default, flyouts are enabled, so when users hover over a particular option, the system will display a cascading menu of sub-options to choose from. 5. Users can disable flyouts, and choose other settings, by clicking *Preferences* in the page footer. *[Est. Time: 5 mins]*	Staff User Guide Chapter 1
6 ☐	Introduce Staff Components: *My Staff Dashboard, My Staff Resources, and My Staff Account*	Provide brief overview of these staff tools. Instructor can select each option to display all sub-options. *[Location: Left navigation menu for staff]*	*My Staff Dashboard* 1. Review the *My Dashboard* feature, which is a collection of customized widgets or shortcuts. 2. Explain that widgets correspond to staff's activities. 3. Click [Configure Dashboard Widgets] to demonstrate adding or removing widgets, clicking *Save* to secure your edits. *My Staff Resources* 1. Review the options within *My Staff Resources*, which is essentially a staff user's "toolbox." 2. Explain that as staff use the system, these shortcuts will become more meaningful and useful.	Staff User Guide Chapter 2 QRC

Item	Activity	Overview	Details	User Guide
			3. Provide the following overview: ✓ *Correspondence* – Staff's correspondence letters. ✓ *Messages* – Staff's (system) messages Inbox. ✓ *Communication Templates* – Staff's correspondence templates/models. ✓ *My Alerts* – Staff's subscriptions to system alerts. *Alerts can help staff manage their workflow and inform them of new activities or required actions for customers in their caseload.* ✓ *Search Lists* – Staff's saved search list results (individual and employer searches). ✓ *Assigned Cases* – Staff's case load. ✓ *My Reports* – Staff's saved reports. ✓ *My Virtual Recruiter* – Staff's saved job order alerts and resume alerts. ✓ *My Preferences* – Staff's settings for theme, flyouts, and (left navigation) group display options. ✓ *My Appointments* – Shortcut to appointments calendar. ✓ *Upcoming Events* – Shortcut to events calendar. ✓ *My Email Log* – List of staff's email correspondence. *My Staff Account* 1. Review *My Staff Account,* which allows staff to modify their contact info, establish desired preferences, and set desired landing pages. 2. Invite participants to select *Yes* for *Display new registrants in the most recently assisted individual and employer links*. As a result, the system will display the fictitious accounts they create as recently assisted customers (for quick and easy access). 3. Remind participants to click *Update Account* to save their changes. *[Est. Time: 25 mins]*	

Item	Activity	Overview	Details	User Guide
7 ☐	Create (Individual) Client Account	Participants will use Registration Template handout to create similar client profiles. Point out system features that provide user assistance. *[Location: Manage Individuals ► Create an Individual]*	1. Use training handout (Registration Template) to help participants complete this initial duty. 2. Stress importance of "best practices" by first searching for individual before attempting to complete system registration on their behalf (especially with UI imports). 3. Stress the importance of documenting job seeker login info on their training handouts (Registration Template). 4. Assign last two digits of SSN for each participant. 5. Remind training participants to not use real, personal information (especially SSNs) because many users will access this Training site. 6. Select **Manage Individuals ► Create an Individual**. Use Individual Registration screen to point out system features, such as: ✓ General text header instructions (screen top) ✓ Help text (? Icons) ✓ Legends (red text) ✓ Text formatting guides (blue text) ✓ Hyperlinks for additional assistance (Find zip code) 7. Allow participants to work on their own. Instructor enters data to create individual account, too. Make mistake to show alert. 8. Following system registration, the system will display the individual's name under *Currently Managing* in top left corner of the screen. 9. Explain that if changes must be made to system registration data, users should not click the Back button. They should access the General Information tab of the individual's Personal Profile. *If staff click the individual's name under Currently Managing, the system displays their profile folders. Staff who are new to the system should click to expand each folder to learn file locations more quickly and easily.* *[Est. Time: 15 mins]*	Staff User Guide Chapter 3 QRC

Item	Activity	Overview	Details	User Guide
8 ☐	Manage Individual Profiles	The system provides staff access to the individual's account profile. Staff privileges determine the extent to which staff may access account information. *[Location: Manage Individuals ► Assist an Individual]*	Explain the following: 1. The "Currently Managing" component in ICC displays the name of the person (or company) staff is currently assisting. 2. Account information is maintained in profile folders. 3. Staff privileges control access to this information. 4. When staff assists an individual or employer, the customer's service menu appears below the staff menu. See color change in left navigation menu. 5. Individuals may access their profiles and plan, but cannot access *staff's* profiles. 6. The system displays the active folder/tab in RED text. *[Est. Time: 2 mins]*	Staff User Guide Chapter 3 QRC
9 ☐	Identify Labor Exchange Tools for Individuals	Explain that staff will use various labor exchange tools on behalf of the customers they serve to help them achieve employment. These include the Resume Builder, Job Search capabilities, and the Virtual Recruiter Job Alert. By design, staff view vs. individual view are nearly identical. *[Location: Manage Individuals ► Assist an Individual]*	Explain the following: 1. Clients (individuals) should create their resumes before conducting a job search, because some (if not, most) internal job orders will require job seekers to include their resumes with their job applications. 2. The system provides multiple ways to reach a desired location. 3. By design, when staff manage an individual, the left navigation menu changes color between staff options and client options. 4. The Quick Menu for individuals displays quick links to job search options, the Resume Builder, and their profile folders. 5. Click the person's name under *Currently Managing* to access their profile folders. 6. Click the + sign to expand each folder. 7. Click the Jobs tab of the Search History folder to access jobs the individual previously viewed. 8. Click the Job Applications tab of the Employment Plan Profile to access jobs the individual previously applied for. 9. Click the Virtual Recruiter tab of the Employment Plan Profile to access job alerts for the individual.	Individual User Guide Chapter 3 QRC

Item	Activity	Overview	Details	User Guide
			10. Click the Resumes tab of the Employment Plan Profile to access the individual's resume(s). 11. Hover over the Job Seeker Services component from the individual's left navigation menu to show alternate access to these labor exchange tools. *[Est. Time: 5 mins]*	
10 ☐	Create a Resume	Demonstrate using the Resume Builder to create a template-based resume for the individual. Participants will use a simple template to save time and effort. *[Location: Manage Individuals ▶ Assist an Individual ▶ My Individual Plans ▶ Employment Plan Profile ▶ Resumes tab]* *You may also select Quick Menu ▶ Resume Builder.*	1. Click the status drop-down; explain that users can select a desired status to view matching resumes. 2. Explain that all resumes are maintained in this tab folder, regardless of the creation method or the navigation path used. 3. Explain that individuals may have up to 10 resumes at any time, and they remain active for 365 days. 4. Explain that resume edits restart the "active clock," or that users can click the Reactivate All Expired Resumes link. 5. Click **Create New Resume**. 6. Explain that the progress bar will change based on the selected resume template (done in a later step). 7. Enter a resume title. 8. Identify the various resume creation methods available. 9. Maintain default (*Comprehensive*) and click **Next**. 10. DWD recommends that staff always use the Comprehensive resume creation method because it collects the most information of all the resume types. The comprehensive resume presents more job seeker information to employers and more data collected for the State. *Users must click Next to save data entry for each step, and to proceed to the next step.* 11. Click **OK** to accept pop-up display. 12. Select the individual's desired work location. 13. Point out that resume data entry simultaneously completes the Background Wizard, which contains details of the individual's work and employment history.	Individual User Guide Chapter 3 QRC

Item	Activity	Overview	Details	User Guide
			14. Select the individual's desired occupation (*Chefs and Head Cooks)* and point out the Search for an Occupation option if the system fails to identify their desired occupation. 15. Point out links to current labor market information. 16. Select the individual's desired salary and point out the View Labor Market Wage Rates for Chefs and Head Cooks feature. 17. Complete data entry for remaining "employer searchable items." 18. Select *Training Resume Template* when prompted to select a desired resume template. The resume template controls the data requirements, layout, and appearance of the resume. 19. Explain that users can modify the template settings and click Save As to keep a custom template for themselves. 20. Click Preview Sample Resume with this Template to see what the finished resume will look like. 21. Enter Education and Training details. *Note that the system does not assume the education level previously entered is the highest level. Therefore the information previously entered during system registration did not roll forward to this section.* 22. Enter Employment History details. 23. View the O*NET job skills associated with the individual's employment history. 24. Explain users can click Modify Skills to manually edit list. 25. The same rule applies for Tools and Technology items. 26. Enter the Objective. 27. Confirm the individual's contact information. 28. When the system displays the resume, explain that users may click section hyperlinks to edit content therein, or the Edit Template link to change the overall appearance and structure of the resume. 29. Click **Save Resume & Return**.	

Item	Activity	Overview	Details	User Guide
			[Est. Time: 15 mins]	
11 ☐	Introduce Job Search Methods	Provide an overview of the various job search options/methods that individuals can utilize. *[Location: Manage Individuals ▶ Assist an Individual ▶ My Individual Profiles ▶ Search History Profile ▶ Jobs tab ▶ Click **Search for a Job**]* *You may also select Quick Menu ▶ Job Search.*	1. Click through each of the job search tab options to explain the following: ✓ *Quick Job Search* – Most popular job search method; incorporates the most commonly used search criteria. ✓ *Advanced Job Search* – Offers multiple, specific criteria that work better for internal than external jobs. ✓ *Job Search by Employer* – Enables job seekers to access employer-specific job openings. ✓ *Job Search by Education* – Displays jobs based on their educational requirements. ✓ *Job Search by Skills* – Enables job seekers to find jobs according to skill requirements they match. These include the following skills: o Job o Tools and technology o WorkKeys o Personal o Interests o Work Values *Job seekers must first conduct a skill assessment before using this job search method.* ✓ *Job Search by Resume Criteria* – Matches job requirements to the selected resume's attributes (desired salary, occupation, and education level). ✓ *Job Number Search* – Enables job seekers to retrieve job orders by their unique ID number. *[Est. Time: 5 mins]*	Individual User Guide Chapter 3 QRC
12 ☐	Conduct Job Search	Instructors should prepare for this lesson by ensuring three types of job orders exist for participant selection:	To execute the job search, explain and perform the following: 1. Each search method enables job seekers to select a desired work location. The default shown draws from the user's Background and/or Resume information. 2. Click the hyperlink value to modify it.	Individual User Guide Chapter 3

Item	Activity	Overview	Details	User Guide
		✓ Internal (preferred) job that is open and available ✓ Internal (preferred) job that is suppressed and requires applicant to meet with staff ✓ External (spidered) job Instructors should work exclusively from the Quick Job Search tab screen for this lesson. The search criteria they choose should provide access to these pre-created jobs. To determine if a job is suppressed, under the employer column of the job search it will read suppressed. To determine if a job is internal, under the source column of the job search there will be a star. *[Location: Individuals Job Search ► Quick Job Search tab screen]* *You may also select Quick Menu ► Job Search.*	3. From the Desired Work Location drop-down list, point out the various options available. Click *State*. 4. Click to expand additional quick search options. 5. Explain that job seekers (or staff on their behalf) can choose any combination of search criteria. 6. From the Occupation Group drop-down list, click *Food Preparation and Serving Related Occupations*. 7. Point out the veteran search below; explain this will be covered during the veteran services lesson shortly. 8. Click **Search**. *[Est. Time: 10 mins]*	QRC
13 ☐	Analyze Job Search Results	The "loose" search criteria utilized in the previous step should provide multiple job orders to work with. Instructors should identify the 3 jobs to apply for, as explained above. If the system displays no jobs, click to change the search criteria and try again. *[Location: Individuals Job Search ► Quick Job Search tab screen]*	1. Review the job search results screen; identify the following: ✓ Change search criteria link (if no jobs, or more than 500 jobs, are shown) ✓ Save this Job Search link (to create a Virtual Recruiter job alert) ✓ Summary vs. Detailed views ✓ ESI Job link ✓ Each column of search results data ✓ Ability to sort results by column heading ✓ The legend below the table that defines job source ✓ The Select column [Refer link displayed for staff referral purposes (not available to self-service job	Individual User Guide Chapter 3 QRC

Item	Activity	Overview	Details	User Guide
			seekers); Google mapping capability] ✓ Records per page adjustment ✓ *Save search* button (Virtual Recruiter) *[Est. Time: 10 mins]*	
14 ☐	Apply for Jobs: Scenario 1	Participants will work from the job search results screen to practice applying for all three job types. *[Location: Job Search Results screen]*	*Scenario 1: Internal, Non-Suppressed Job* 1. Click the job title link for the desired internal, non-suppressed job order. 2. Identify symbols in the *Job Summary* section. 3. Investigate how the individual matches up to job requirements. 4. Click the Show Additional Job Information link. 5. Review sectional details, including links to Indiana's current labor market information. Explain this is called "in-context LMI." 6. Click **How to apply for this job**. 7. Explain that the system might display a message alert if the individual does not meet job requirements (as revealed in *How I Match Up* section). 8. Explain that multiple job application methods may apply, although job seekers only select one (click **Apply via Resume**, if available). 9. On the Submit Application screen, perform the following: a. Select the individual's resume b. Determine whether the applicant has provided the information needed. (Green checkmarks indicate *Yes*; red Xs indicate *No*.) c. Point out the ability to attach (or create) a cover letter, as part of the individual's communication tools. *Self-service job seekers can create default letters (cover, acceptance, or follow-up) as well as custom letters (correspondence templates).* d. Click the acknowledgement checkbox.	Individual User Guide Chapter 5 QRC

Item	Activity	Overview	Details	User Guide
			e. Click **Submit Application**. 10. Explain that the system automatically created a job referral for the individual. This is part of the system's service tracking capabilities, because service code *500 – Referred to Job Over 150 Days* was written to the individual's service plan for federal reporting purposes. *Participants will see the service plan later during the WP case management segment.* 11. Click **Return to Job Details**. 12. Click **Select Another Job**. *[Est. Time: 10 mins]*	
15 ☐	Apply for Jobs: Scenario 2	Participants will work from the job search results screen to practice applying for all three job types. *[Location: Job Search Results screen]*	*Scenario 2: Internal, Suppressed Job* 1. Click the job title link for the desired internal, suppressed job order. *The system displays the company name to staff, but self-service job seekers will only see "Suppressed" for the company name.* 2. Repeat steps in Scenario 1, to show similarities in job details. 3. Click **How to apply for this job**. 4. On the resulting Application Instructions screen: a. Select the individual's resume. b. Click **Please review my qualifications for this job**. *This is important! Participants who fail to click this button will not be able to participate in a future activity lesson.* 5. Explain that by clicking this button, the individual's pending referral will be placed in a que so that staff can determine applicant qualifications for the job (*Manage Labor Exchange ▶ Referrals Pending Review*). We will see this later in the day. 6. Click **Return to Job Details**.	Individual User Guide Chapter 5 QRC

Item	Activity	Overview	Details	User Guide
			7. Click **Select Another Job**. *[Est. Time: 5 mins]*	
16 ☐	Apply for Jobs: Scenario 3	Participants will work from the job search results screen to practice applying for all three job types. *[Location: Job Search Results screen]*	*Scenario 3: External Job* 1. Click the job title link for the desired external job order. 2. Click the Show Additional Job Information link. 3. Explain that external jobs pulled from the World Wide Web often lack the detail that internal jobs provide. 4. Explain that Geographic Solutions applies as much detail as possible, using known attributes from the O*NET. 5. Click **how to apply for this job**. 6. Explain the system opens a new window directly to the original job post. 7. Explain that job seekers must follow the website's directions to formally apply for the job. This might include website registration. 8. Explain that the Indiana Career Connect system is configured to automatically track this job application attempt as a self-service referral to an external job. 9. Click **Return to Job Details**. 10. Click **Select Another Job**. *[Est. Time: 5 mins]*	Individual User Guide Chapter 5 QRC
17 ☐	Create a Virtual Recruiter Job Alert	The Virtual Recruiter automates job searches and communication alerts based on the job seeker's job search criteria. To create a VR Job Alert, job seekers (or staff on their behalf) conduct a job search, and from the job search results page, record details of the job alert's behavior. *[Location: Job Search Results screen]*	1. Explain that the Virtual Recruiter is an automated job search tool that notifies job seekers when their job search criteria finds at least one job match. 2. Explain that job seekers can maintain up to 10 Job Alerts at any given time. 3. Explain that the VR Job Alert begins with a manual job search, and that from the Job Search Results screen, the user clicks Save this Job Search (top) or **Save search** (bottom). 4. Explain this function is available, even if the system displays no job search results. 5. Explain that for the sake of time, we will work from the	Individual User Guide Chapter 5 QRC

Item	Activity	Overview	Details	User Guide
			search results screen from our previous job search. 6. Click **Save search**. 7. Enter a meaningful title. 8. Select the run frequency. 9. Select the desired notification method(s). 10. Select whether to receive email if no jobs found. 11. Modify the expiration date, if desired. 12. Click **Save**. *[Est. Time: 5 mins]*	
18	Veteran Job Search	The job search features previously demonstrated apply to veterans, too. In addition, the system converts military occupation codes to civilian job codes for job match suitability. Veterans also have immediate access to newly posted internal jobs (due to automatic, 24-hour *Vet Hold*) before non-veterans have access to them. *[Location: Manage Individuals ► Assist an Individual ► My Individual Profiles ► Search History Profile ► Jobs tab ► Click **Search for a Job**]* *You may also select Quick Menu ► Job Search.*	Explain the following: 1. When staff assists veterans, the system displays an American flag next to the customer's name under *Currently Managing*. 2. For those veterans with Significant Barriers to Employment, the system displays *SBE*, similar to American flag. 3. Veteran Priority of Service enables veterans to access and apply for jobs whose status = Vet Hold. 4. The system runs a nightly process to release job orders from this initial, 24-hour status; the status becomes *Open and Available* afterwards. 5. The **Service Tracking: ON** or **OFF** feature (under *Currently Managing*) indicates that by simply accessing specific pages in ICC, the system will record a specific service provided in the individual's Wagner Peyser service plan. Authorized staff may turn off service recording when necessary (for example, if a Veteran's Service Rep must temporarily assist a non-veteran client). 6. This service tracking convention is important to meet federal reporting requirements. Perform the following: 1. Click the Click here if you are a veteran and wish to enter your military occupation link. 2. From the Occupations by Military Specialty tab screen, identify each of the four search options by clicking each.	Individual User Guide Chapter 3 QRC

Item	Activity	Overview	Details	User Guide
			✓ Military Occupational Specialty ✓ (MOS) Code ✓ Keyword ✓ Branch of Service 3. Explain that when veterans conduct a job search via one of these options, they enter or select search criteria and click *Search*. They can analyze search results and apply for jobs the same way we did earlier. 4. Explain that we'll cover more about Veterans Services when we cover Wagner Peyser case management. *[Est. Time: 10 mins]*	
19 ☐	Wrap Up of Labor Exchange Services for Individuals	The Resume Builder and Job Search are the two strongest labor exchange tools for individuals. However, they may invest in other system tools and features to help make employment (or re-employment) possible. *[Location: Manage Individuals ▶ Assist an Individual ▶ Services for Individuals Group on Left Navigation Menu]*	Click to select each and explain the following: 1. In addition to the Resume Builder and job search capabilities, job seekers can take advantage of other system tools, such as: ✓ *Career Services* – Research specific occupations, choose a new career, or analyze their skills to find suitable occupations. ✓ *Job Seeker Services* – Review the steps for career placement, research employer businesses, review job market trends, and maintain correspondence letters. ✓ *Education Services* – Find a suitable training or educational program, as well as information on training providers and schools. ✓ *Labor Market Services* – Access information about labor market trends, statistics, and economic and demographic data. *[Est. Time: 10 mins]*	Individual User Guide Chapters 4-7 QRC
20 ☐	Create (Employer) Client Account	Participants will use Registration Template handout to create similar business profiles. Point out system features that provide user assistance.	1. Use training handout (Registration Template) to help participants complete this initial duty. 2. Stress importance of "best practices" by first searching for employer before attempting to complete system registration on their behalf.	Staff User Guide Chapter 11

Item	Activity	Overview	Details	User Guide
		[Location: Manage Employers ► Create an Employer]	3. Stress the importance of documenting employer login info on their training handouts (Registration Template). 4. Assign last two digits of FEIN for each participant. 5. Select **Manage Employers ► Create an Employer**. 6. Confirm that assistance features exist, as previously discussed. 7. Allow participants to work on their own. Instructor enters data to create individual account, too. 8. Following system registration, the system will display the company's name under *Currently Managing* in top left corner of the screen. 9. Explain that if changes must be made to system registration data, users should not click the Back button. They should access the General Information tab of the employer's Corporate Profile. *If staff click the company's name under Currently Managing, the system displays their profile folders. Staff who are new to the system should click to expand each folder to learn file locations more quickly and easily.* *[Est. Time: 10 mins]*	QRC
21 ☐	Employer Notification Alerts and Employer Verification	Self-service employers who complete system registration bear account status *Pending Employer Verification*, which restricts their ability to immediately post jobs and review candidate resume details. When staff perform system registration on behalf of an employer, the account status is *Enabled* (no restrictions). The system automatically notifies key staff in each office when employers complete system registration.	Explain the following: 1. Had the employer registered on their own, key staff from the affiliate office will receive email notification. 2. The system does this by matching the employer's ZIP Code to a list of corresponding offices, and then the Employer Service Rep(s) affiliated with that office. 3. Business Service Representatives will likely perform the same employer verification checks they currently do. 4. To manually change the employer's account status, staff select *Manage Employers ► Employer Access Rights*. 5. Enter search criteria and click *Search*. 6. From the search results screen, staff click the desired *Access* hyperlink. 7. Select the desired access level (i.e., Enabled).	Staff User Guide Chapter 11 QRC

Item	Activity	Overview	Details	User Guide
		[Location: Registration Confirmation screen]	8. Click *Save*. *[Est. Time: 5 mins]*	
22	Manage Employer Profiles	The system provides staff access to the employer's account profile. Staff privileges determine the extent to which staff may access account information. *[Location: Manage Employers ► Assist an Employer]*	Explain the following: 1. The "Currently Managing" component in ICC displays the name of the person (or company) staff is currently assisting. 2. Account information is maintained in profile folders. 3. Staff privileges control access to this information. 4. When staff assists an individual or employer, the customer's service menu appears below the staff menu. See color change in left navigation menu. 5. Employers may access their profiles and plan, but cannot access *staff's* profiles. 6. The system displays the active folder/tab in RED text. *[Est. Time: 2 mins]*	Staff User Guide Chapter 1; Employer User Guide Chapters 2 & 3 QRC
23	Introduce the *Job Order Wizard* and Applicant Management Tools	Review the employer's Recruitment Plan Profile to manage jobs and job applicants. *[Location: Manage Employers ► Assist an Employer ► Employer Profiles ► Human Resource Plan ► Job Order Plan ► Job Orders tab]* ***AND*** *[Recruitment Plan ► Job Applicants tab]* *You may also select Quick Menu ► Manage Jobs.*	*New Job Order* 1. Click **Add New Job Order** to activate the Job Order Wizard. 2. Select *Manual Entry Basic Job Order*. 3. Enter (and select) **Chef** as job title. 4. Select **Chefs and Head Cooks** from the Suggested occupation(s) drop-down list. 5. Demonstrate that users can click Search for an occupation to manually search for and select a desired occupation. ✓ Point out the various search options available. ✓ Click **Close Window**. 6. Click **Next** on Job Order Creation screen. 7. Click Insert Sample Text, and choose *Summary Description*, to provide job description. 8. Enter minimum and maximum salary. 9. Select **Hour** as unit of salary. 10. Select **DOE** for Pay Comments.	Employer User Guide Chapters 3 & 4 QRC

Item	Activity	Overview	Details	User Guide
			11. Select **Hours Per Week**. 12. Select **Shift**. 13. Select minimum education requirement. 14. Enter the minimum experience requirement. 15. Select whether the job is accessible by public transportation. 16. Select whether a driver's license is required. 17. Select **Open and Available** for Staff Job Order Status. *You must perform this step for training participants to access this job. The system does not adjust this status in the Training environment.* 18. Click **Create Job**. *Existing Job Orders* 1. Explain that Job Orders tab is central location for job order and job applicant management. 2. Click Show Filter Criteria to expose filter display options. 3. Explain that *Active* is default status, but staff can choose alternate status to locate desired job order(s). 4. Click job title link, as directed by instructor. 5. Explain that each job order is broken into sections, each with an Edit link that users click to access and modify section details. 6. Explain that staff can manage additional information, such as job order status. 7. Click **Return to Job Orders**. 8. Address the three status columns on Job Orders tab: ✓ *Employer Job Status* yields limited options for employer selection. ✓ *On-line Status* displays whether job seekers can view job in ICC. ✓ *System Status* controls everything; "trumps" employer status. 9. Explain that system status is mainly automated to ease	

Item	Activity	Overview	Details	User Guide
			staff and employer burden. For example, if job order reaches the maximum display date, the system will automatically take the job offline (inactive), and post *Expired* as the status. 10. Explain that staff may also affect job order status. For example, they can close the job or place it on hold. 11. Explain View is the number of unique individuals that viewed the job order. 12. Applicants is the number of individuals that applied for the job and those referred by staff. 13. Review Action column options: ✓ Copy creates job order duplicate, either an exact copy or a copy with advanced options. ✓ Edit enables user to modify the job. ✓ Delete enables user to eliminate the job, provided no pending applicants exist. ✓ Search by Job Criteria enables user to conduct resume search using specific criteria from job order. ✓ Pre-fill Advanced Resume Search enables user to conduct advanced resume search (which enables candidate ranking). ✓ Applicants is an alternate path to the list of job applicants. ✓ Preview enables user to view the job order as shown to a job seeker. ✓ Template enables user to create a template used to build job orders. *Managing Applicants* *For this lesson, the instructor should display a job for which a job seeker has applied.* 1. Explain there are multiple features on-screen to increase staff (and employer) efficiency. ✓ In the Job Order Statistics section, the user can edit limited information, as needed. The user can also	

Item	Activity	Overview	Details	User Guide
			increase the number of positions available, as well as the applicant limit, to accommodate a large response. ✓ In the grey shaded area, the user can click to automate the referral result as “Not Hired,” when an applicant does get hired to close the job opening. ✓ Click to display the filter(s) available to access desired applicants more quickly. 2. Click to display both the summary and detailed view of job applicants for comparison/contrast purposes. 3. Explain that ICC provides links to applicant information to help employers and staff evaluate applicant qualifications. 4. Explain that one of the newest resources is the *How Do They Measure Up*, which compares the applicant’s qualifications to the job’s requirements. 5. Click <u>How Do They Measure Up</u> to show class. 6. Click **Return to Previous Page**. 7. Demonstrate that to record a referral result, the user clicks <u>Change Status</u>. *Don’t actually create and save the status change; just simulate the actions.* 8. Explain that the user completes this dynamic page, which changes/updates based on data entry performed, and clicks **Save Status** to secure their edits. 9. Click **Cancel**. 10. Explain that if user set status to Hired, and all others remain at Not Specified, the user can click the here link to automatically change their statuses to Not Hired. Note that this is a huge time saver! 11. Finally, if the employer or staff wishes to contact applicants to confirm the referral result, they would perform the following steps: *Don’t actually create and send the correspondence; just simulate the actions.* ✓ Click the *Select* checkbox for each desired applicant.	

Item	Activity	Overview	Details	User Guide
			✓ Click <u>Contact</u> at the bottom of the *Select* column. ✓ Using the Message Composition screen displayed, confirm the delivery method(s), enter a subject, and click <u>Insert Template</u>. ✓ Click the <u>Select</u> link for the appropriate letter (acceptance letter, rejection letter, or a custom letter the employer created). ✓ Click **Cancel** (not Send), but explain that's what would be done. *[Est. Time: 35 mins]*	
24 ☐	Introduce the *Resume Search* and the *Virtual Recruiter*	Review how employers conduct candidate resume searches and set up resume alerts. *[Location: Manage Employers ▶ Assist an Employer ▶ Employer Profiles ▶ Search History Profile ▶ Viewed Resumes tab]* ***AND*** *[Human Resource Plan ▶ Recruitment Plan ▶ Virtual Recruiter tab]* *You may also select Quick Menu ▶ Candidate Search.*	*Search for Resumes* 1. Click **Search for Candidate Resumes**. 2. Point out there are several search methods to choose from. 3. Conduct a quick resume search following the instructor. 4. From the search results screen, identify the *Save this Candidate Search* section, which we will revisit later. 5. Click a view resume link to view resume details. 6. Explain that by viewing the resume, the system automatically saves it to the Viewed Resumes tab. 7. Click **Return to previous page**. 8. Click **Save search** from the list of resume search results. *The system will display this save function even if no resumes are displayed on the search results screen.* 9. Complete Virtual Recruiter details; click **Save**. 10. Explain the system will display this saved resume alert in the Virtual Recruiter tab. 11. Access each of these tab screens to show evidence of the saved resume search activities. *Search for Resumes* 1. Click **Search History Profile ▶ Viewed Resumes**. 2. Explain this tab screen maintains resumes the employer	Employer User Guide Chapters 3 & 4 QRC

Item	Activity	Overview	Details	User Guide
			previously viewed. 3. Click a resume title link, as directed by the instructor. 4. Explain that it's essentially the same form that individuals would see, without hyperlinks and other on-screen resources. 5. Click **Return to previous page**. *[Est. Time: 10 mins]*	
25 ☐	Wrap Up of Labor Exchange Services for Employers	Like job seekers, employers can also invest in other system tools and features to help fill employee vacancies. *[Location: Manage Individuals ► Assist an Individual ► Services for Employers Group on Left Navigation Menu]*	Click to select each and explain the following: 1. In addition to the job order management and resume search capabilities, employers can take advantage of other system tools, such as: ✓ *Recruitment Services* – Provides multiple tools and resources to help employers manage their business. ✓ *Education Services* – Find a suitable training or educational program, as well as information on training providers and schools. ✓ *Labor Market Services* – Access information about labor market trends, statistics, and economic and demographic data. *[Est. Time: 10 mins]*	Employer User Guide Chapters 4-6 QRC
26 ☐	Demonstrate How to Create Internal Job Referrals	Staff use this feature to create job referral(s) for the individual they are currently managing. Staff may also use Manage Labor Exchange ► Mass Job Referrals *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► General Profile ► Activities Tab]*	1. Click *Internal Job Referrals*. 2. Explain that system maintains all referrals (those created via self-service *and* staff-assisted) to internal job orders on behalf of the individual staff is currently managing. 3. Click *Add a Referral*. 4. Explain that job referral creation is a 3-step process: ✓ *Step 1: Find the job(s).* ✓ *Step 2: Select the job applicant.* ✓ *Step 3: Record referral details.* 5. (Step 1) Conduct a job search using any tab option displayed. 6. (Step 1) From the list of job search results, click the *Refer*	Staff User Guide Chapter 5 QRC

Item	Activity	Overview	Details	User Guide
			checkbox for each desired job. 7. (Step 1) Click the Refer link at the bottom of the checkbox column. 8. (Step 2) Click *Select [Last Name], [First Name]* button. (Step 3) *In the Staff Information section…* 9. Select the staff's LWIA/Region, office location, and staff position (*DVOP, LVER*, or *Staff*). *This is important for federal reporting purposes, especially if staff is currently managing a veteran.* (Step 3) *In the Referral Type section…* 10. Explain the difference between notifications and referrals. 11. Explain that notifications apply to internal employers only. 12. Select *Referral with notification to Both*. *This is important, because staff mistakenly expect to see a referral recorded when they only select notifications.* (Step 3) *In the Referral Type Notification Delivery section…* 13. Explain that system only shows this section if staff selected a notification referral type. 14. Explain and maintain delivery method. 15. Explain and maintain email address conventions. (Step 3) *In the Job Order(s) to Refer to section…* 16. Confirm job(s) by clicking to remove unwanted job(s). (Step 3) *In the Information to send to employer (applies to VOS job orders only) section…* 17. Explain that system only shows this section if staff select an employer notification referral type. 18. Explain that message content is system-automated. 19. Explain that staff can click Preview Message to see what the recipient will see.	

Item	Activity	Overview	Details	User Guide
			(Step 3) *In the Employer Follow Up section…* 20. Explain that system only shows this section if staff selected an employer notification referral type. 21. Explain that message content is system-automated. 22. Explain that staff can click Preview Message to see what the recipient will see. 23. Explain that staff may select No Employer Follow Up to delete this notification. 24. Explain that staff can select a different send date (7, 15, 30, 45, 60 days from now). (Step 3) *In the Job Seeker(s) to be referred section…* 25. Confirm the desired client(s). (Step 3) *In the Notification to Send to Job Seeker section…* 26. Explain that system only shows this section if staff selected a job seeker notification referral type. 27. Explain that message content is system-automated. 28. Explain that staff can click <u>Preview Message</u> to see what the recipient will see. (Step 3) *In the Job Seeker Follow Up section…* 29. Explain that system only shows this section if staff selected a job seeker notification referral type. 30. Explain that message content is system-automated. 31. Explain that staff can click <u>Preview Message</u> to see what the recipient will see. 32. Explain that staff may select *No Employer Follow Up* to delete this notification. 33. Explain that staff can select a different send date (7, 15, 30, 45, 60 days from now). (Step 3) *In the Print Notification section…* 34. Maintain *None Selected*.	

Item	Activity	Overview	Details	User Guide
			(Step 3) *In the Referral Evaluation section…* 35. Review referral details. 36. Click *Save*. *Staff can print a hard copy of the job referral.* *[Est. Time: 20 mins]*	
27 ☐	Record Job Referral Results	Staff use this feature to create job referral(s) for the individual they are currently managing. Staff may also use Manage Labor Exchange ► Mass Job Referrals *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► General Profile ► Activities Tab]*	1. Click *Internal Job Referrals*. 2. Click the Results link under the Action column. *In the Applicant's Recruitment Stage section:* 3. Select *Yes* for each appropriate stage and provide the date. *This will trigger changes in the next section.* *In the Applicant Summary section:* 4. Provide the appropriate information as prompted by system. *In the Comments section:* 5. Enter additional information, if desired. Comments, although helpful, are not the same as case notes. *[Est. Time: 5 mins]*	Staff User Guide Chapter 5 QRC
28 ☐	Manage Job Referrals Pending Staff Review	Staff use this feature to determine whether job seekers who attempted to apply to a suppressed job have the necessary qualifications, and thus may be referred to the job. Training participants will search for their individuals who attempted to apply to the suppressed job. *[Location: Manage Individuals ► Assist an Individual ► Manage*	1. Enter search criteria (individual's first and last name) and click **Search**. 2. Identify the summary information to gauge applicant's qualifications, such as: 3. Job title link, to review job requirements. 4. Job skills match info. 5. Resume link 6. Matched Up link 7. Explain that if the person is qualified for the job, staff clicks Refer to record referral details. (Click to show.)	

Item	Activity	Overview	Details	User Guide
		Labor Exchange ▶ Referrals Pending Review]	8. Explain the information required is exactly the same as performed in the former lesson to create a job referral. 9. Click **Return to Referrals Pending Review**. 10. Explain that in our scenario, staff has determined the applicant is not qualified, and therefore must delete the referral request (click <u>Delete</u>). 11. Click **OK** to accept popup alert. *[Est. Time: 5 mins]*	
29 ☐	Demonstrate Wagner Peyser (WP) Case Management	Explain how the system automatically creates a WP enrollment record each time an individual completes system registration. PIRL (*Participant Individual Record Layout*) represents federal data collection requirements which have yet to be finalized. *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Programs tab]*	1. Explain that staff users may still provide labor exchange assistance to job seekers and employers, but may now take advantage of more powerful tools that will be explained and demonstrated. 2. Click + or – to show or hide program info. Expose the WP program details. 3. Explain system configuration setting where individual system registration = auto-completed WP application, participation form, and 1st service (003 – registration). 4. Thus, system registration = WP program participation (because individuals must receive a program service to become program participants). 5. Use one of the following methods to review WP app: Edit Wizard, view one tab screen at a time Verification Summary for required data Print capability, which includes signature panel Clicking completed WP app link = View Mode 6. Explain that Geographic Solutions has added a new PIRL tab screen for the purpose of collecting what we believe to be required data (according to DOLETA guidance). Staff are encouraged to begin using this tab to practice (and prepare for) PIRL's additional data reporting requirements. 7. Reminder: On PIRL, it is important to note that staff does not have the right to ask someone if they have a disability. However, it is acceptable to ask if they will require any assistive technology, but only if this question is being	Staff User Guide Chapter 5 QRC

Item	Activity	Overview	Details	User Guide
			asked to all clients. Also inside the WP application, the miscellaneous information tab, we have added in enrollment for HIRE, Rapid Response, and Veteran Gold Card under the WP module. This is a major change in current state. 8. Explain that the system's design incorporates the following steps for enrollment in a federal program: ✓ Application (eligibility determination) ✓ Participation form (applicant's status) ✓ Activity services (enrollment) ✓ Closure (no more services) ✓ Outcome (hard exit) ✓ Follow-up (if applicable) 9. Explain that most WP services are automatically captured by the system. Identify specific examples from training (resume, job search, job referrals). *[Est. Time: 20 mins]*	
30 ☐	Record Wagner-Peyser Services Manually	Participants will practice adding single vs. multiple services to an individual's profile. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Explain that staff can manually add one or more services at a time to the individual's service plan. ***Add Single Activity Service*** 2. Invite class to click the Create Activity link. Please do not use the term "services." Use "activities" or "activity services," despite what the screen might display. 3. Minimally, complete required items. 4. Click **Save Changes** to secure edits. 5. Explain the following: ✓ *Scheduled* dates and times can be used for future events; *actual* dates cannot be future dates. ✓ Scheduled events can be tracked under the *Manage Activities* component in left navigation menu. ✓ LWIA/Region will default to staff's profile, but can be modified if staff belongs to more than one office. ✓ Position is important for federal reporting purposes.	Staff User Guide Chapter 5

Item	Activity	Overview	Details	User Guide
			Staff, *DVOP*, or *LVER* pull from staff account profile, and can be modified if staff has more than one position. ✓ Staff can add a case note to be associated with this service. It will also be maintained in the Case Notes tab of Staff's General Profile. ***Add Multiple Activity Services*** 1. Invite class to click the Create Multiple Activities link. 2. Complete the Staff Info section (top) if necessary. 3. Click desired checkboxes in column one to select activity services. Current date will display in Actual End Date field. 4. Modify dates and times as appropriate. 5. To associate this event with a Rapid Response event, click the desired RR Search link to search for and select the RR event. 6. Click **Save**. *[Est. Time: 15 mins]*	
31 ☐	Conduct Final Review	End the day with a short review of the content covered.	The instructor will summarize highpoints of the day's events, and invite questions from training participants. *[Est. Time: 5 mins]*	
32 ☐	Dismissal	End of Day 1	Have participants log off computer, as directed by lab staff.	

Day 2: WIOA Adult/DW Case Management Training

https://trainingta2.geosolinc.com/vos18000000/vosnet/Default.aspx?responsive=true

Item	Activity	Overview	Details	User Guide
1 ☐	Conduct Review of Day 1	Training participants will log in to the system for visual representations of content review.	Allow participants to ask questions if they have any. Instructors will provide brief overview of instructional content. *[Est. Time: 15 mins]*	
2 ☐	Assist an Individual	Access the account of the fictitious customer created on day 1, referencing the ICC Training Registration Template. Before starting this lesson, instructor should assist multiple individuals and save at least one search list. *[Location: Manage Individuals ► Assist an Individual OR Quick Search]*	1. Discuss *Saved Search Lists* and *5 Most Recent* list. 2. Explain that staff can increase this number using *My Staff Account*. 3. Review the various search features available, including *More Search Options*. 4. Enter search criteria and click **Search**. Point out features on search results screen, such as: ✓ Summary vs. Detailed view ✓ Sorting capability ✓ User Name link vs. Action links ✓ Save List feature ✓ Page navigation options *If users click name of one of the 5 most recent…the system will display the staff landing page, which is also managed within My Staff Account.* *[Est. Time: 5 mins]*	Staff User Guide Chapter 3 Page 18
3 ☐	Conduct WIOA Case Management Overview	Prepare staff for WIOA case management, in terms of system design and adherence to federal, state, and local policy. The Workforce Innovation and Opportunity Act (WIOA) is a federal program designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need	1. Explain how ICC complies with federal program requirements. 2. Issue disclaimer: Staff privileges in Training site may not be the same in Production site. 3. Explain that system design prompts staff to enter and verify data; when staff clicks **Next** to save each page, business rules and edit checks enforce proper data entry which ensures accurate reporting. 4. Click Show Filter Criteria to explain that on the Programs tab of staff's Case Management Profile, criteria may be used to show or hide program details.	Staff User Guide Chapters 4 & 5

Item	Activity	Overview	Details	User Guide
		to compete in the global economy. Signed into law by President Barack Obama in July 2014, WIOA takes the place of the former Workforce Investment Act (WIA), and amends the Adult Education and Family Literacy Act, the Wagner Peyser Act, and the Rehabilitation Act of 1973. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	*[Est. Time: 5 mins]*	
4 ☐	Conduct WIOA Services Eligibility Determination	Create a WIOA application for the customer, discussing each section and its functions. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	*Before starting this lesson, ensure that all service provider test data is created to permit WIOA enrollment!].* 1. Explain that staff clicks + or – to show or hide program info. 2. Explain that class will follow instructor's lead, so stay together. 3. Explain that web pages will update based on staff selection, so allow pages to reload. 4. Confirm that all participants are using the same form and managing their own individuals, not yours!!! 5. Click <u>Create Workforce Innovation and Opportunity Act (WIOA) Program</u>. If necessary, p*articipants can change the individual's DOB in the Personal Profile ► General Information tab screen.* *Start Tab Screen* 1. Staff may click to view individual details. 2. Staff may set view preference (*progress bar, tab screens*, or *stack information*). 3. Each customer group checkbox initiates the display of corresponding screens/fields for data entry. 4. When staff clicks *Next* for each step, the system a. applies business rules to conduct edit checks.	Staff User Guide Chapter 6 QRC

Item	Activity	Overview	Details	User Guide
			b. saves the data entered. c. proceeds to next page. *If staff commits an error, the system will display an error message in red, bullet point text.* 5. Business rules for application date (application date ≤ 15 days ago; application date ≠ future date). 6. Business rules for eligibility date (eligibility date ≥ application date; eligibility date ≠ future date). 7. Adult Basic Career Services Eligibility checkbox was intended for those customers that support an integrated service delivery model. (However, system modifications enable staff to select Adult Eligibility checkbox at a later time if more than basic services are required.) *If staff selects Adult Eligibility, they cannot select ABC Services Eligibility.* 8. For *Application Date* field, enter today's date. 9. Click *Adult Eligibility* checkbox. 10. For *Adult Eligibility Date* field, enter today's date. 11. Click *Dislocated Worker Eligibility* checkbox. 12. For *Dislocated Worker Eligibility Date* field, enter today's date. *If preferred, staff can select one eligibility group, and edit the form later to select another group. Staff will be required to complete additional data entry screen-by-screen.* *Contact Tab Screen* Explain the following: 1. Demonstrate SSN verify process (click Verify to open list; make selection; click Verify again to close list). *In Verify selection list, only click Reset to remove the selection and continue. The system automatically saves the selection and displays a blue check mark to confirm.* 2. Scan, Upload, Link, and View links are used only for Document Scanning and Document Management modules.	

Item	Activity	Overview	Details	User Guide
			3. <u>Scan</u> enables staff to scan a verification document, and associate it with customer's account profile. 4. Click <u>Upload</u> to demonstrate how staff searches for and selects verification document accessible by their computer. • Enter document tag • Click **Browse** to search for and select document • Click **Open** • Click **Save** 5. Click <u>View</u> to demonstrate document annotations. • Identify zoom, mouse tools, rotation, and annotation tool capabilities • Identify ability to save image changes • Identify document download options • Click **Close Window** 6. Record alternate contact info, if necessary. *[Est. Time: 15 mins]*	
5 ☐	Demonstrate Exiting the WIOA Application Wizard	Participants will practice exiting the WIOA application before its completion. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	*Demographics Tab Screen* 1. Click <u>Exit Wizard</u> before completing this page to demonstrate "Incomplete" status. Then come back by clicking the WIOA Program App link. *Partial save checkbox disables edit checks and verification items, enabling staff to complete the form (and creates "Partial" status for WIOA application). Staff must complete the form at a later date when applicant provides required information.* *Important to note that if a partial application is completed, the system will toss it if it's not completed within 90 days.* *<u>Exit Wizard</u> maintains data saved up to that point (application status = "Incomplete").* *[Est. Time: 5 mins]*	
6 ☐	Continue WIOA Services Eligibility	Continue Completing the WIOA Application.	1. To complete the WIOA application, participants click the WIOA application link on the Programs tab.	Staff User Guide Chapter 6

Item	Activity	Overview	Details	User Guide
	Determination	*[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	2. Explain that system restarts at tab/screen 1, which enables staff to modify previously saved info (if applicable). 3. Explain that staff clicks **Next** until system displays tab/screen 3, and continues to click **Next** to save each page/step of the application. *Demographics Tab Screen* 1. To verify DOB, click Verify, make selection, and click Verify to close list. 2. Click Link to demonstrate using former verification document for this item, too. • Enter document tag • Click **Select** button for previous document • Click **Link Document** 3. Explain that errors made with Selective Service registration and citizenship status affect WIOA eligibility (these are good items to troubleshoot if formula eligibility determination = NONE). *Veteran Tab Screen* 1. Explain that this screen is system-set, and may require little or no data entry. *Employment Tab Screen* 1. Explain this screen is used to determine Dislocated Worker eligibility. Many items are conditionally required, and might not bear red asterisk (*). 2. Explain that staff will first select a Dislocated Worker category, and then verify it. For training, please use category 3 in the Dislocated Worker Category and Dislocation Category Verification. 3. Explain that staff may click Event Search to access a list of Rapid Response events to select from. In response, the system prefills most employer details. 4. Explain that staff may click to draw from individual's employment history if previously documented. 5. Explain that participants will make up employer details for	

Item	Activity	Overview	Details	User Guide
			the sake of this lesson. *Education Tab Screen* 1. Complete and verify required items. 2. Explain there are different requirements for WIOA youth applicants. *Public Assistance Tab Screen* 1. Complete and verify required items. 2. Explain there are group (family) and individual statuses for public assistance. 3. Explain there are different requirements for WIOA youth applicants. 4. If applicant receives public assistance, system will automatically set low income status to YES (income info will not be required federally). *Barriers Tab Screen* 1. Explain that staff must identify individual as well as employment barriers. 2. Complete and verify required items. *Family Income Tab Screen* 1. In WIOA application, select income below income level guidelines [Income Table] link. *Miscellaneous Tab Screen* 1. Explain that staff will only see this tab screen/step if State must collect additional information. *Eligibility and Grants Tab Screen* 1. Explain that *Applicant Eligibility* section is system-set, and displays the following: • Approved eligibility = green shading • Priority flags = acronyms in *Priority* column • 5% exception/limitation for Youth, if applicable • Reason(s) the applicant is not eligible • Inactive checkbox to delete funding for this applicant	

Item	Activity	Overview	Details	User Guide
			for the selected program. 2. Explain that *WIOA Grant Eligibility* section (state-wide funds) must be staff-set, and if applicable, staff clicks <u>View Available Grants</u> to select desired grant(s). *This section also enables staff to delete funding for this applicant when/if applicable.* 3. Explain that staff may perform case assignment in the *Staff Eligibility Info* section if desired. 4. Explain the following options: ✓ *Back* – used to access previous screen/step. ✓ *Next* – Displays WIOA enrollment form. System auto-fills the WIOA participation form (which normally is the next step). ✓ *Finish* – saves application and displays Programs tab screen. 5. Click **Finish**. Point out: Edit Wizard, view one tab screen at a time Verification Summary for required data Print capability, which includes signature panel *Clicking completed WIOA app link = View Mode.* 6. Explain that system displays application type(s) / customer group(s) within hyperlink name. *[Est. Time: 30 mins]*	
7 ☐	Demonstrate Case Note Functionality	The Case Notes tab of the staff's General Profile is where staff can record details of a customer's program participation, or other pertinent data. *[Location: Manage Individuals ► Assist an Individual ► Staff's Profile ► General Profile ► Case Notes tab]*	1. Explain that Case Notes tab maintains notes for ALL programs. 2. Explain that staff privileges determine whether functions may be performed (deleting case notes, viewing edit history, etc.). 3. Explain that system configuration determines whether staff must first complete program application before creating case note for that program (App ID may be required). WP program is automatically active, due to system configuration (system registration = WP participation). 4. Explain that case note templates automatically pre-fill	Staff User Guide Chapter 4 QRC

Item	Activity	Overview	Details	User Guide
			case notes to reduce effort; staff can modify case note details. 5. Click <u>View Case Note Templates</u> link. Existing templates will be displayed here. 6. Click <u>Create New Template</u> to perform class activity. 7. Explain that staff privileges allow template sharing, and that staff may be as detailed as they wish when creating templates. 8. Enter template details; click **Save**. 9. Confirm case note template is saved (will be displayed on list screen). Click **Return to Previous Page**. 10. Click **Add New Case Note** to conduct next class activity. Explain staff may choose their template to auto-fill case note details; otherwise, staff must manually enter details. *Suppressed case notes means only staff members with access to case notes for this workforce region may view suppressed case notes. This protects the individual, should confidential or sensitive information be entered.* 11. Enter contact date. 12. Explain that staff may also send case note to customer as system message (final check box). 13. Click **Save**. 14. On Case Note List screen, simulate: ✓ Filtering capability ✓ Click-column-heading-to-sort capability ✓ Printing case notes ✓ How to view/modify existing case note *[Est. Time: 15 mins]*	
8 ☐	Complete WIOA Participation Record	Complete WIOA Participation Record. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Click + to expand WIOA program details. 2. Explain this step is not required if staff selects **Next** from WIOA application. 3. Explain that the WIOA participation form records the person's status immediately prior to program participation (enrolled in 1st service). 4. Explain that staff shouldn't complete this form unless	Staff User Guide Chapter 6

Item	Activity	Overview	Details	User Guide
			they're ready to immediately enroll the applicant. The system immediately displays WIOA enrollment screen afterward. 5. Click <u>Create Participation</u> link. 6. Complete and save the form by clicking **Next**. The system will then display the WIOA enrollment form. *[Est. Time: 5 mins]*	
9 ☐	Record Initial WIOA Activity Enrollment	Complete Initial WIOA Enrollment by recording Activity Service *102 – Initial Assessment.* The services and activities that staff record are primarily for reporting purposes. Staff must enter the assessment results elsewhere. This is a non-fundable activity, so staff do not select budget information. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Click <u>Create Activity</u> link. 2. Explain that the system will again display a wizard to guide staff, and they will click **Next** to save data entry on a screen-by-screen basis. *General Information Tab Screen* 1. Select *10B – Adult – Individualized Services/Training* for the customer program group. 2. Explain that Customer Program Group list box displays all eligibility groups (from WIOA app). If the desired group is not listed, staff must troubleshoot the WIOA application. *First check simple remedies, such as citizenship and selective service registration statuses. Then review each page, in order, to identify missing or errant data entry.* 3. Select/confirm LWIA/Region and office location. 4. Skip Agency Code; not required by State. 5. Skip Grant; only used if WIOA-eligible. 6. Click <u>Select Activity Code</u>. Select *102 – Initial Assessment.* 7. Explain that staff selections for customer program group, region, and activity code affect info displayed on Service Provider list (next tab screen). 8. Click <u>Today</u> to enter activity's projected end date. 9. Explain WIOA Participation form controls actual begin date, which is un-editable. This is why staff should only complete WIOA participation form when they're ready to enroll client in WIOA program. 10. Explain that first service establishes program participation (client is then included in performance reporting).	Staff User Guide Chapter 6

Item	Activity	Overview	Details	User Guide
			11. Confirm/select *Staff* for staff member's position. 12. Explain that authorized staff may perform case assignment from this page, and create a case note (after saving this page). *Service Provider Tab Screen* 1. Explain that data relationships established on tab/screen 1 control the display of selectable service providers and programs. 2. Explain that the system will auto fill items when/if there is only one possible response\selection. 3. Explain that the occupational training code is only required for training services ('300' activity codes). 4. Explain that all provider information pulls from *Manage Providers* component (shown in left navigation menu). 5. Click to select provider *Department of Workforce Development* and service *Initial Assessment*. *Tab Screens 3-6* 1. Explain system bypasses tab screens 3 through 6 because the selected service is NOT fundable (therefore, tabs are not required). *Closure Information Tab Screen* 1. Explain staff may close service now or later (requires end date and completion code if now). *If staff does not complete the initial WIOA enrollment form, they must redo the WIOA participation form when they re-attempt program enrollment on behalf of the customer ("2-for-1 proposition").* 2. Click <u>Today</u> for actual activity end date and select *Successful Completion* for activity status. 3. Click *Finish* to save data entry. 4. Confirm successful enrollment by viewing service table on Programs tab screen now displayed. *[Est. Time: 10 mins]*	

Item	Activity	Overview	Details	User Guide
10 ☐	Conduct Basic Skill Assessment	Demonstrate how staff record assessment results for the basic skills assessment. *The system does not provide the actual assessment – only the area within which to record the results.* Show participants which assessments are included under *Aptitudes, WorkKeys* and *Other Assessments*. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Assessments tab]*	1. Click Basic Skills Assessment link. Explain that results, if previously captured, would be displayed on initial screen. Click **Add Assessment**. *Staff must first select their LWIA to view its basic skill assessment types.* 2. Follow instructor's lead. 3. Explain that system administrators may add/delete assessments using Admin site. 4. Explain that staff may record grade equivalent or actual raw score for each area (reading, math, language). 5. Explain that if score entered for standard assessment (i.e. TABE), system will determine whether customer meets the definition of Basic Literacy Skills deficient (BSD). Please point out to staff that the Raw Scores still won't auto calculate BSD, so they're better off putting in the grade equivalency. It is also important to point out that as opposed to currently, there is no functionality to put in both the raw score and the grade equivalency. 6. Follow instructor's lead to complete the assessment; click **Save**. 7. Click to **Return to Assessment Folder**. *Aptitudes Assessment* 1. Click Aptitudes ► **Add Aptitude Assessment**. 2. Click to select LWIA/region 3. Click *Test Name* to view list display. 4. Click **Cancel**. 5. Click to **Return to Assessment Folder**. *WorkKeys Assessment* 1. Explain this is an existing feature, and that most staff should be familiar with it. 2. Click WorkKeys. 3. Explain that unless data conversion efforts include a customer's WorkKeys scores, staff must manually input the customer's initial scores, after clicking the client authorization checkbox. (The system will not allow staff to	Staff User Guide Chapter 4

Item	Activity	Overview	Details	User Guide
			perform data entry unless they click this checkbox.) 4. Explain that staff can work within any section to complete data entry, and then click View Occupation to see occupations for which the customer is most suitable (according to WorkKeys skills matching). 5. Click **Cancel**. *Other Assessments* 1. Click Other Assessments > **Add Assessment**. 2. Click *Test Given* to display assessment list. 3. Click **Cancel**. 4. Click **Return to Assessment Folder**. *[Est. Time: 10 mins]*	
11 ☐	WIOA Intensive Activity Enrollment	As self-service practice, allow training participants to record activity *205 – Development of IEP/ISS*. The process will be similar to entering the initial WIOA program activity. Use today's date for actual begin date and projected end date. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Click Create Activity link. 2. Ask the class to record "Development of IEP/ISS," which starts and ends today. 3. When participants have completed this exercise, the instructor shall complete data entry for comparison purposes. *Of particular significance are two parts of the activity enrollment form: the dates on the first and last tab screens. Staff may feel compelled to enter a projected start date, but those are reserved for program activities with a future start date. Likewise, participants may be slightly confused entering an actual end date and status for an activity scheduled to end in the future. Explain that staff can skip the Closure Information tab screen and close/complete it later.* *[Est. Time: 5 mins]*	Staff User Guide Chapter 6
12 ☐	Manage the Individual Employment Plan (IEP)	The IEP (also called the Individual Service Strategy (ISS) or the Education Development Plan (EDP) identifies the employment and education goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve desired the outcome(s).	1. Remind participants that similar to the initial skill assessment, we recorded the "development of the IEP" activity for reporting purposes, but must navigate elsewhere to manage details of the plan. 2. Explain that in addition to the IEP, the system also offers the Objective Assessment Summary (OAS). This is another living document that staff primarily manage on behalf of WIOA Youth and Wagner-Peyser veterans to identify barriers to employment, desired program activities	Staff User Guide Chapter 4 QRC

Item	Activity	Overview	Details	User Guide
		Participants will practice creating an employment plan by documenting goals and objectives. The IEP can be modified at any time during the course of the participant's program enrollment. To create plan details, staff works from left to right amongst the tab screens provided. To close the plan, staff works in reverse order (right to left). *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Plan tab]*	and services, and desired program outcomes. 3. The purpose of the IEP is to document the giant steps (goals) and the baby steps (objectives) the customer must complete to achieve the desired plan outcome(s). 4. Explain the class will manage an OAS record on day 3. 5. Click **Create Individual Employment Plan/Service Strategy**. *Plan Tab Screen* 1. Click Today for IEP start date. 2. Select/confirm staff's LWIA/Region and office. 3. Click **Next**. *Goals Tab Screen* 1. Click Add New Goal to create re-employment goals. In Goal Information section, staff performs the following: 2. Select program affiliation (*WIOA*) 3. Select *Employment* for goal type. 4. Select *Short Term* for goal term. *There is no official definition for goal type and goal term. It is important, however, that staff interpret and use these terms the same statewide.* 5. Enter a brief goal description, such as *Secure F/T job with benefits*. 6. Click Today to establish goal. 7. Enter estimated completion date 60 days from now. 8. Skip actual completion date. 9. Maintain completion status of *Open*. 10. Explain that staff may use the Comments text box to provide more detail, if necessary. 11. Click **Save**. When the screen refreshes, the system displays the first of potentially many goals for this plan. 12. Click **Next**. *Objectives Tab Screen* 1. Explain there are two types of objectives for staff to	

Item	Activity	Overview	Details	User Guide
			choose from: Pre-defined and free-form objectives. *To create a pre-defined objective (from a list)…* 1. Click <u>Select pre-defined objectives</u>. In the Objective Information section, staff performs the following: 2. Click to select the newly created goal. 3. Confirm staff's LWIA/Region and office. 4. Select *WIOA* for program affiliation. 5. When ICC displays the list of pre-defined objectives, click the Resume Writing checkbox and click <u>Today</u> to establish start date. 6. Click the Review Date textbox. *By default, the system provides a 45-day review date. Staff can maintain or overwrite the date.* 7. Click **Save**. *To create a free-form objective…* 1. Click <u>Add new objective</u> from the Objectives Tab Screen. In the Objective Information section, staff performs the following: 2. Click to select the newly created goal. 3. Confirm staff's LWIA/Region and office. 4. Select *WIOA* for program affiliation. 5. Ask the class to suggest a good objective (baby step) to help the customer become reemployed. Record your favorite response, or simply enter *Conduct job searches daily using ICC*. 6. Click <u>Today</u> to establish objective. 7. Click the Review Date textbox. In response, the system sets a 45-day review date that staff may edit. 8. Click **Save**. When the screen refreshes, the system displays the updated Objectives tab screen. 9. Click **Next**. *Services Tab Screen* 1. Explain this screen displays all services delivered under the program(s) selected for plan affiliation. This is helpful	

Item	Activity	Overview	Details	User Guide
			so staff won't have to exit the plan to confirm which services have already been provided to the customer. 2. Click Finish. In response, the system displays the updated Plan tab screen. 3. Explain that staff may only manage one IEP at a time, so they will click Edit to modify plan details as needed. *[Est. Time: 20 mins]*	
13 ☐	Record WIOA Training Activity Enrollment	Attendees will practice entering and managing details for a fundable WIOA training service. In this exercise, training participants will see the Advanced Individual Fund Tracking (AIFT) module at work. Whether performed by case managers or fiscal staff, the following will occur: ✓ Budget selection ✓ Voucher creation, approval, and management ✓ Payment creation and management *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Click Create Activity link. 2. Explain that the system will again display a wizard to guide staff, and they will click **Next** to save data entry on a screen-by-screen basis. *General Information Tab Screen* 1. Select *10B – Adult – Individualized Services/Training* for customer program group. 2. Select/confirm LWIA/Region and office location. 3. Skip Agency Code; not required by State. 4. Skip Grant; only used if WIOA-eligible. 5. Click Select Activity Code. Select *300 – Occupational Skills Training - Approved Provider (ETPL/ITA).* 6. Explain that a training service is a good example of how multiple dates may come into play. For example: ✓ *Projected Begin Date* can hold a future date, if known, but it is not a required field. If staff use this field, they must edit this enrollment form at a later time to provide an *actual* begin date, which cannot be a future date. 7. Actual Begin Date is the date training begins. Click Today. 8. Enter Projected End Date following instructor's lead. 9. Explain that the questions regarding distance learning and the individual training account (ITA) are reserved for federal reporting purposes. Although they are not required at this time, staff are encouraged to complete them to prepare for potential PIRL (Personal Individual Record Layout) requirements. 10. Confirm/select *Staff* for staff member's position.	Staff User Guide Chapter 6

Item	Activity	Overview	Details	User Guide
			11. Explain that authorized staff may perform case assignment from this page, and create a case note (after saving this page). *Service Provider Tab Screen* 1. Remind class that the selected customer program group, the LWIA/region, and the activity service code determine the display of selectable service providers and programs. 2. Click to complete service provider details following instructor's directions. *Enrollment Cost Tab Screen* Explain the following: 1. The displayed enrollment costs derive from account information maintained within the *Manage Providers* component along the left navigation menu. 2. If staff edit any line item details, the "master" record remains unchanged; edits only affect this enrollment record. 3. Authorized staff may click to select additional line items, and then click *Add*, to adjust the total enrollment cost automatically. 4. The system displays "Available" vs. "Obligated" cost amounts. When staff approve vouchers, the voucher amount(s) become obligated. *Financial Aid Tab Screen* 1. Explain that State policy will determine whether staff can or must apply financial aid to reduce enrollment costs for this service. To demonstrate: 2. Click the link to access the FAFSA website. 3. Explain this is general information to help identify various sources of financial aid. 4. Close the browser window. 5. Click **Yes** back on the Financial Aid tab screen. 6. Click [Click Here to Add Financial Aid]. 7. From popup window, click Pell Grant.	

Item	Activity	Overview	Details	User Guide
			8. In Pell Grant section, select *Amount Applicable towards Service Cost*, although staff could choose otherwise. 9. Explain this is a decision point; only authorized staff can approve the status of financial aid. 10. Click **Awarded**; explain that ICC will not apply financial aid otherwise. 11. In *Awarded* text box, enter **1500.00**. 12. In *budget toward Service Cost* text box, enter **1500.00**; explain that amount could be less, but not more. 13. Click **Calculate**. In response, the system adjusts the enrollment cost accordingly. *This is demo only; do not click Next without first deleting financial aid details.* 14. Click **No** for *Financial Aid Applicable* to remove $1500.00 Pell Grant. *Enrollment Budget Tab Screen* 1. Explain that for fund tracking to occur, either the case manager or a fiscal agent must select the desired budget(s), also called fund stream(s). 2. This can be done now, when the enrollment record is being created, or at a later time. 3. Click [Click Here To Select a Budget]. 4. Explain that the system will display all eligible budgets based on criteria such as the following: a. Activity service begin and end dates (because budgets are created by time period) b. Customer program group (i.e., Adult, Dislocated Worker, etc.) c. LWIA/region (budgets cover physical areas) d. Program (i.e., WIOA funds vs. TAA funds, etc.) e. Budget balance (is there enough to cover enrollment costs?) 5. Explain that staff may select multiple budgets. For example: a. Budget “A” for semester 1; budget “B” for semester 2.	

Item	Activity	Overview	Details	User Guide
			b. Budget "A" for tuition; budget "B" for books and supplies. c. Shared expenditures between departments. 6. Bottom line, this design must be flexible to account for the many ways Geographic Solutions' customers do business. 7. Select desired budget(s) following instructor's lead. ***BUDGET ALLOCATION*** 1. When screen refreshes, click Edit to allocate (or "earmark") funds. 2. Follow instructor's lead to enter funded amount. 3. Click **Save**. In response, the system automatically adjusts details in the *Enrollment Budget Information* section. *Budget Planning Tab Screen* 1. Explain that this screen displays funding obligation totals, in real time, based on voucher and payment management. 2. Explain that similar to budget selection, either the case manager or a fiscal agent must create and approve the training voucher(s) to track expenditures. 3. This can be done now, when the enrollment record is being created, or at a later time. Approved *vouchers obligate funds. The voucher amount is the amount by which the selected budget is reduced.* ***ADD/APPROVE VOUCHER*** 1. Click [Add a Voucher]. The voucher window displays. *In the Summary section…* 1. ICC displays read-only information. *In the Remittance Address section…* 1. ICC displays the one stop location. *In the Manage Voucher section…* Explain the following: 1. ICC displays the current status of the voucher (*Active; Pending Approval*).	

Item	Activity	Overview	Details	User Guide
			2. Unauthorized staff may complete voucher details for authorized staff (i.e., fiscal agent) to approve. 3. ICC will not withdraw funds unless the voucher status is APPROVED and all data entry has been successfully saved. 4. Click **Approved**. 5. Student ID and Reference No: text boxes are available for State tracking purposes and are not required. 6. Vouchers expire in one year. *In the Services Provided Between section…* 1. Enter the appropriate ending date. Ideally, this should match the activity service ending date. *In the Cost Details section…* 1. The Planned amount for each line item cost represents the cost limit. 2. The Available amount for each line item cost is the difference between the planned amount and the sum total of approved vouchers for that line item. 3. ICC will prevent staff from entering an amount greater than the planned amount. 4. Staff may enter multiple vouchers (i.e., one for tuition, one for books, one for tools, etc.), the sum of which cannot exceed the planned amount for each line item. 5. Follow instructor's lead to complete cost details. *For one of the line items, enter an amount higher than the planned amount. When you click Save, the system will display an error message prompting staff to re-enter the correct amount.* 6. Click **Save**. 7. Click **OK** to accept the message alert. 8. Edit the appropriate line item entry. 9. Click **Save**. The system now displays the updated Budget Planning tab screen. 10. Click [+] to expand voucher details. 11. Explain that the ID # is system-generated.	

Item	Activity	Overview	Details	User Guide
			12. Explain that if staff created multiple vouchers, the table would display one row for each. 13. Review the details displayed in the voucher table. *If the voucher remains in "Pending Approval" status, staff cannot remit payment in the next lesson.* ***ADD PAYMENT*** 1. Click [Add a Payment]. The payment window displays. 2. Explain there are many similarities between vouchers and payments, in terms of information displayed, data entry requirements, and business rules. *In the Summary and Voucher Details sections…* 1. ICC displays read-only information. *In the Manage Payments section…* Explain the following: 1. ICC displays the current status of the voucher. 2. Unlike authorized staff may complete payment details (by selecting *Open* status) for authorized staff (i.e., fiscal agent) to approve. 3. Status selections include the following: a. *Open* – similar to approved. b. *Approved for Payment* – not for ICC. c. *Payment Hold* – payment cannot be processed due to insufficient documentation or approval. d. *Payment Offline* – not for ICC. e. *Payment Processed* – not for ICC. f. *Void* – deletes the voucher. 4. Click **Open**. 5. Click Today to record the payment date. 6. Enter a cash forecast date, which can be used to: a. Record the date that a cash draw-down is needed. b. Record the date that payment is due to a vendor. 7. Check # and Vendor Document # fields are used for State tracking purposes.	

Item	Activity	Overview	Details	User Guide
			In the For Services Provided Between section… 1. Enter the service end date. *In the Details section…* 1. The Vouchered amount for each line item cost represents the payment limit. 2. The Available amount for each line item cost is the difference between the vouchered amount and the sum total of approved payments for that line item. 3. ICC will prevent staff from entering an amount greater than the vouchered amount. 4. Staff may enter multiple vouchers (i.e., one for tuition, one for books, one for tools, etc.), the sum of which cannot exceed the planned amount for each line item. 5. Follow instructor's lead to complete cost details. *Staff clicks checkbox once final payment has been submitted.* *Closure Information Tab Screen* 1. Explain that training services that could result in credential attainment require additional data entry by staff. 2. Because the activity services has a future end date, click **Finish**. *[Est. Time: 30 mins]*	
14 ☐	Record Measurable Skills Gain for PIRL Reporting Requirements	The U.S. Dept of Labor is actively defining reporting requirements for the Participant Individual Record Layout (PIRL). To prepare case managers/staff for this data collection effort, Geographic Solutions added this data collection resource to comply with *known* federal guidance. There are limited business rules in this screen.	1. Explain that the following are newly defined measures within which staff capture skills gains: a. PIRL 1807-Post Secondary Transcript/Report Card b. PIRL 1808-Secondary Transcript/Report Card c. PIRL 1809-Training Milestone d. PIRL 1810-Skills Progression 2. Click Create Measurable Skills Gain. *In the General Information section…* 1. Staff select/confirm their LWIA/region and office. *In the Skills Attainment Information section…*	

Item	Activity	Overview	Details	User Guide
			1. Select the individual's skill type. 2. Click Today to enter the skill attainment date. 3. Select the individual's achievement type. 4. Click Verify to select a desired form of attainment verification. *In the Staff Information section…* 1. Explain that staff can create a case note to formally document this achievement. 2. Explain that staff may access the Case Notes tab screen to access the case note, too. 3. Click **Save**. *[Est. Time: 15 mins]*	
15 ☐	Prepare for WIOA Program Closure	Close out all program services in preparation for case closure. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Plan tab]*	Explain: 1. How system would conduct soft exit based on the services/dates displayed. 2. There is no specific 'close order' required. 3. Training services and Youth records will require more data entry to close service(s). *[Est. Time: 15 mins]*	Staff User Guide Chapter 6
16 ☐	IEP/ISS Closeout	Practice closing objectives, then goals, and then plan. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Plan tab]*	Explain how staff will work amongst these three tabs to effectively record and actual end date, status, and status reason to end plan details. *[Est. Time: 5 mins]*	Staff User Guide Chapter 4
17 ☐	WIOA Case Closure Form	The WIOA Case Closure form is a bridge between active program enrollment and program exit. Completion of the Case Closure form enables staff to record WIOA follow-up services as needed. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ►*	1. Required to record WIOA follow-up activities for participant (i.e., counseling, support services, etc.). 2. WIOA case closure is NOT required. 3. Mainly used to record performance indicators prior to program exit (employment, credential attainment, etc.) 4. Completed form ceases all planned WIOA services. 5. Youth tab displayed even for non-youth participants. *[Est. Time: 15 mins]*	Staff User Guide Chapter 6

Item	Activity	Overview	Details	User Guide
		Programs tab]		
18 ☐	WIOA Follow-up Activities	Discussion on how specific follow-up activities can be added to the enrollment table after Case Closure is completed. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. All services display 'F' in front of code number. 2. Recording follow-up services same as planned services. 3. No need to complete entire record; just perform partial demonstration on 1st screen. Staff would complete the remaining enrollment tab screens as they would otherwise. *[Est. Time: 5 mins]*	Staff User Guide Chapter 6
19 ☐	WIOA Outcome Form	Discuss "Soft" vs. "Hard" Exits. Staff need only complete a program outcome form if the customer satisfies a global exclusion.	1. The system is configured to perform combined soft exits (WP, WIOA, and TRADE). 2. Simple function like job search could re-start 90-day countdown process for ALL programs. 3. Soft exit generally prescribed, but staff may also complete hard exits. These are generally used for global exclusion reasons. 4. System automatically creates case note based on "exit reason" details that staff must enter. *[Est. Time: 10 mins]*	Staff User Guide Chapter 6
20 ☐	Quarterly WIOA Follow-up Records	Discuss purpose and structure of the quarterly follow-up link.	1. WIOA quarterly follow-ups only required if individual soft exited (or hard exited citing NON-global exclusion). 2. System determines "due by" date for required forms. 3. Staff may create local follow-ups as often as necessary (these are NOT federally reported). 4. Staff may capture credential attainment info using follow-up forms if they couldn't when service closed. 5. *WIOA Failed Attempts* section only required to record failed contact attempts. When 'X' failed attempts reached, system no longer required follow-up for that quarter. *[Est. Time: 15 mins]*	Staff User Guide Chapter 6
21 ☐	Manage Follow-Up	This feature in staff's left navigation menu provides search criteria to identify which customers require quarterly follow ups for each quarter, as well as the type of follow	1. Click **Manage Follow Up**. 2. Click WIOA Exiters for Follow-Up. 3. Explain that staff select the desired search criteria for required items, minimally.	Staff User Guide Chapter 20

Item	Activity	Overview	Details	User Guide
		up required (1st quarter follow up, 2nd quarter follow up, etc.). *[Location = left navigation menu]*	4. When they click Search, the system will display a hyperlink to each client record, permitting staff to complete the quarterly follow up. *Staff may not be able to perform this function in the Training environment.* *[Est. Time: 15 mins]*	
22 ☐	Final Review	End the day with a short review of the content covered.	The instructor will summarize highpoints of the day's events, and invite questions from training participants. *[Est. Time: 5 mins]*	
23 ☐	Dismissal	End of Day 2	Have participants log off computer, as directed by lab staff.	

Day 3: WIOA Youth Case Management Training

https://trainingta2.geosolinc.com/vos18000000/vosnet/Default.aspx?responsive=true

Item	Activity	Overview	Details	User Guide
1 ☐	Day 2 Review	Open with Question and Answers session to cover material from previous day	Allow participants to ask questions if they have any. Instructors will provide brief overview of instructional content. *[Est. Time: 15 mins]*	
2 ☐	System Registration for Youth	Participants will enter system as staff to create a WIOA youth profile. Participants will create similar profiles. *[Location: Manage Individuals ► Create an Individual]*	1. Using the *Training Registration Template* (handout), allow participants to work on their own to create a WIOA Youth applicant. 2. Stress importance of “best practices” by first searching for individual before attempting to complete system registration. 3. Stress the importance of documenting job seeker login info on their training handouts (Registration Template form). 4. Assign last two digits of SSN for each participant. These should match each staff member’s setup established on day 1. *Instructors should have already completed system registration for the WIOA Youth applicant, so they can provide training assistance, if needed.* *[Est. Time: 15 mins]*	Individual User Guide Chapter 3
3 ☐	Eligibility Determination	Participants will complete a WIOA application to determine eligibility for program services. System design enables staff to link to and complete a basic skills assessment for the applicant, as part of the practice scenario. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	*Before starting this lesson, ensure that all service provider test data is created to permit WIOA enrollment!].* 1. Explain that staff clicks + or – to show or hide program info. 2. Explain that class will follow instructor’s lead, so stay together. 3. Explain that web pages will update based on staff selection, so allow pages to reload. 4. Confirm that all participants are using the same form and managing their own individuals, not yours!!! 5. Click <u>Create Workforce Innovation and Opportunity Act (WIOA) Program</u>.	Staff User Guide Chapters 4 & 6 QRC

Item	Activity	Overview	Details	User Guide

			If necessary, p*articipants can change the individual's DOB in the Personal Profile ► General Information tab screen.*
			
			Start Tab Screen
			
			1. Staff may click to view individual details.
			2. Staff may set view preference (*progress bar, tab screens*, or *stack information*).
			3. Each customer group checkbox initiates the display of corresponding screens/fields for data entry.
			4. When staff clicks *Next* for each step, the system
			    a. applies business rules to conduct edit checks.
			    b. saves the data entered.
			    c. proceeds to next page.
			
			If staff commits an error, the system will display an error message in red, bullet point text.
			
			5. Business rules for application date (application date ≤ 15 days ago; application date ≠ future date).
			6. Business rules for eligibility date (eligibility date ≥ application date; eligibility date ≠ future date).
			7. For *Application Date* field, enter today's date.
			8. Click *Youth Eligibility* checkbox.
			9. For *Youth Eligibility Date* field, enter today's date.
			
			If preferred, staff can select one eligibility group, and edit the form later to select another group. Staff will be required to complete additional data entry screen-by-screen.
			
			Contact Tab Screen
			
			Explain the following:
			
			1. Demonstrate SSN verify process (click Verify to open list; make selection; click Verify again to close list).
			
			In Verify selection list, only click Reset to remove the selection and continue. The system automatically saves the selection and displays a blue check mark to confirm.
			
			2. Scan, Upload, Link, and View links are used only for Document Scanning and Document Management	

Item	Activity	Overview	Details	User Guide
			modules. 3. Scan enables staff to scan a verification document, and associate it with customer's account profile. 4. Click Upload to demonstrate how staff searches for and selects verification document accessible by their computer. • Enter document tag • Click **Browse** to search for and select document • Click **Open** • Click **Save** 5. Click View to demonstrate document annotations. • Identify zoom, mouse tools, rotation, and annotation tool capabilities • Identify ability to save image changes • Identify document download options • Click **Close Window** 6. Record alternate contact info, if necessary. 7. Click to verify applicant's address; select Driver's License. 8. Click Upload to import sample driver's license. *Demographics Tab Screen* 1. To verify DOB, click Verify, select Driver's License, and click Verify to close list. 2. Click Link to demonstrate using former verification document for this item, too. • Enter document tag • Click **Select** button for previous document • Click **Link Document** 3. Explain that errors made with Selective Service registration and citizenship status affect WIOA eligibility (these are good items to troubleshoot if formula eligibility determination = NONE). *Veteran Tab Screen* 1. Explain that this screen is system-set, and may require little or no data entry.	

Item	Activity	Overview	Details	User Guide
			Employment Tab Screen 1. Complete and verify required items. (*). 2. Explain there are few requirements because we didn't select Dislocated Worker checkbox on Start tab. *Education Tab Screen* 1. Complete and verify required items. 2. Identify the different requirements for WIOA youth applicants. *Public Assistance Tab Screen* 1. Complete and verify required items. 2. Explain there are group (family) and individual statuses for public assistance. 3. Explain there are different requirements for WIOA youth applicants. 4. If applicant receives public assistance, system will automatically set low income status to YES (income info will not be required federally). *The system does not autofill staff's public assistance selection made during system registration.* *Barriers Tab Screen* 1. Explain that staff must identify individual as well as employment barriers. 2. Complete and verify required items. *Family Income Tab Screen* 1. Remind class neither family size nor annualized family income are required, because the applicant receives public assistance. *Miscellaneous Tab Screen* 1. Explain that staff will only see this tab screen/step if State must collect additional information. *Eligibility and Grants Tab Screen*	

Item	Activity	Overview	Details	User Guide
			1. Explain that *Applicant Eligibility* section is system-set, and displays the following: • Approved eligibility = green shading • Priority flags = acronyms in *Priority* column • 5% exception/limitation for Youth, if applicable • Reason(s) the applicant is not eligible • Inactive checkbox to delete funding for this applicant for the selected program. 2. Explain that *WIOA Grant Eligibility* section (state-wide funds) must be staff-set, and if applicable, staff clicks <u>View Available Grants</u> to select desired grant(s). *This section also enables staff to delete funding for this applicant when/if applicable.* 3. Explain that staff may perform case assignment in the *Staff Eligibility Info* section if desired. 4. Explain the following options: ✓ *Back* – used to access previous screen/step. ✓ *Next* – Displays WIOA enrollment form. System auto-fills the WIOA participation form (which normally is the next step). ✓ *Finish* – saves application and displays Programs tab screen. 5. Click **Next**. *[Est. Time: 30 mins]*	
4 ☐	1st WIOA Activity Enrollment	Complete initial WIOA enrollment by recording activity service 412 – Objective Assessment. Similar to Adult/DW lesson, the services and activities that staff record are primarily for reporting purposes. Staff must enter the assessment results elsewhere. This is a non-fundable activity, so staff do not select budget information. Remind staff that there is a	1. Click <u>Create Activity</u> link. 2. Explain that the system will again display a wizard to guide staff, and they will click **Next** to save data entry on a screen-by-screen basis. *General Information Tab Screen* 1. Select *20E – Youth Out School* for the customer program group. 2. Explain that Customer Program Group list box displays all eligibility groups (from WIOA app). If the desired group is not listed, staff must troubleshoot the WIOA application.	Staff User Guide Chapter 6 QRC

Item	Activity	Overview	Details	User Guide
		sequence to activity codes due to business rules behind the scenes. Please go in order from this step forward and do not skip any steps, otherwise you might not have access to some activity codes. *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Programs tab]*	*First check simple remedies, such as citizenship and selective service registration statuses. Then review each page, in order, to identify missing or errant data entry.* 3. Select/confirm LWIA/Region and office location. 4. Skip Agency Code; not required by State. 5. Skip Grant; only used if WIOA-eligible. 6. Click Select Activity Code. Select *412 – Objective Assessment.* 7. Explain that staff selections for customer program group, region, and activity code affect info displayed on Service Provider list (next tab screen). 8. Click Today to enter activity's projected end date. 9. Explain WIOA Participation form controls actual begin date, which is un-editable. This is why staff should only complete WIOA participation form when they're ready to enroll client in WIOA program. 10. Explain that first service establishes program participation (client is then included in performance reporting). 11. Confirm/select *Staff* for staff member's position. 12. Explain that authorized staff may perform case assignment from this page, and create a case note (after saving this page). *Service Provider Tab Screen* 1. Explain that data relationships established on tab/screen 1 control the display of selectable service providers and programs. 2. Explain that the system will auto fill items when/if there is only one possible response\selection. 3. Explain that the occupational training code is only required for training services ('300' activity codes). 4. Explain that all provider information pulls from *Manage Providers* component (shown in left navigation menu). 5. Click to complete service provider details following instructor's directions. *Tab Screens 3-6*	

Item	Activity	Overview	Details	User Guide
			1. Explain system bypasses tab screens 3 through 6 because the selected service is NOT fundable (therefore, tabs are not required). *Closure Information Tab Screen* 1. Explain staff may close service now or later (requires end date and completion code if now). *If staff does not complete the initial WIOA enrollment form, they must redo the WIOA participation form when they re-attempt program enrollment on behalf of the customer ("2-for-1 proposition").* 2. Click Today for actual activity end date and select *Successful Completion* for activity status. 3. Enter school status (Not attending school, HS dropout). 4. Verify this status. 5. Click *Finish* to save data entry. 6. Confirm successful enrollment by viewing service table on Programs tab screen now displayed. *[Est. Time: 10 mins]*	
5 ☐	Demonstrate Case Note Functionality	The Case Notes tab of the staff's General Profile is where staff can record details of a customer's program participation, or other pertinent data. This lesson will serve as a review of the Adult/DW model. *[Location: Manage Individuals ► Assist an Individual ► Staff's Profile ► General Profile ► Case Notes tab]*	1. Explain that Case Notes tab maintains notes for ALL programs. 2. Explain that staff privileges determine whether functions may be performed (deleting case notes, viewing edit history, etc.). 3. Explain that system configuration determines whether staff must first complete program application before creating case note for that program (App ID may be required). WP program is automatically active, due to system configuration (system registration = WP participation). 4. Explain that case note templates automatically pre-fill case notes to reduce effort; staff can modify case note details. 5. Click View Case Note Templates link. Existing templates will be displayed here. 6. Click Create New Template to perform class activity. 7. Explain that staff privileges allow template sharing, and that staff may be as detailed as they wish when creating	Staff User Guide Chapter 4 QRC

Item	Activity	Overview	Details	User Guide
			templates. 8. Enter template details; click **Save**. 9. Confirm case note template is saved (will be displayed on list screen). Click **Return to Previous Page**. 10. Click **Add New Case Note** to conduct next class activity. Explain staff may choose their template to auto-fill case note details; otherwise, staff must manually enter details. *Suppressed case notes means only staff members with access to case notes for this workforce region may view suppressed case notes. This protects the individual, should confidential or sensitive information be entered.* 11. Enter contact date. 12. Explain that staff may also send case note to customer as system message (final check box). 13. Click **Save**. 14. On Case Note List screen, simulate: ✓ Filtering capability ✓ Click-column-heading-to-sort capability ✓ Printing case notes ✓ How to view/modify existing case note *[Est. Time: 15 mins]*	
6 ☐	Objective Assessment Summary (OAS)	"OAS satisfies programmatic needs for recording results of Vocational Skill Assessments or Objective Assessment activities. These results are commonly used to assess vocational skills and aptitudes as related to employability, job seeking and job keeping skills, and may be used in the analysis and development of Employment Plans/Service Strategies." *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles*	Explain the following: 1. Click to create the objective assessment summary. 2. Participants may not need to complete the entire document (9 screens), but may benefit from viewing the type of information presented on each screen. 3. The system pre-fills certain data, such as education and employment history, if already documented in the Background tab screen. 4. Perform minimal data entry where required and save each page to proceed. 5. Check for class understanding to determine how far to go. *[Est. Time: 15 mins]*	Staff User Guide Chapter 4 QRC

Item	Activity	Overview	Details	User Guide
		► Case Management Profile ► Plan tab]		
7 ☐	Conduct Basic Skill Assessment	Demonstrate how staff record assessment results for the basic skills assessment. *The system does not provide the actual assessment – only the area within which to record the results.* Show participants which assessments are included under *Aptitudes* and *Other Assessments*. This lesson will serve as a review of the Adult/DW model. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Assessments tab]*	1. Click Basic Skills Assessment link. Explain that results, if previously captured, would be displayed on initial screen. Click **Add Assessment.** *Staff must first select their LWIA to view its basic skill assessment types.* 2. Follow instructor's lead. 3. Explain that system administrators may add/delete assessments using Admin site. 4. Explain that staff may record grade equivalent or actual raw score for each area (reading, math, language). 5. Explain that if score entered for standard assessment (i.e. TABE), system will determine whether customer meets the definition of Basic Literacy Skills deficient. 6. Follow instructor's lead to complete the assessment; click **Save**. 7. Click to **Return to Assessment Folder**. *Aptitudes Assessment* 1. Click Aptitudes ► **Add Aptitude Assessment**. 2. Click to select LWIA/region 3. Click *Test Name* to view list display. 4. Click Cancel. 5. Click to **Return to Assessment Folder**. *WorkKeys Assessment* 1. Explain this is an existing feature, and that most staff should be familiar with it. 2. Click WorkKeys. 3. Explain that unless data conversion efforts include a customer's WorkKeys scores, staff must manually input the customer's initial scores, after clicking the client authorization checkbox. (The system will not save staff's data entry unless they click this checkbox.) 4. Explain that staff can work within any section to complete	Staff User Guide Chapter 4

Item	Activity	Overview	Details	User Guide
			data entry, and then click View Occupation to see occupations for which the customer is most suitable (according to WorkKeys skills matching). 5. Click **Cancel**. *Other Assessments* 1. Click Other Assessments > **Add Assessment**. 2. Click *Test Given* to display assessment list. 3. Click **Cancel**. 4. Click **Return to Assessment Folder**. *[Est. Time: 10 mins]*	
8 ☐	Literacy & Numeracy	The literacy and numeracy tool was designed to monitor gains made in educational functional levels in reading, math, and or language. Although system configuration options enable the State to use the literacy and numeracy tool for any WIOA customer group, it was intended for out of school youth. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Instructor will demonstrate how staff members first create a pre-test to serve as the baseline assessment for the out-of-school youth participant. 2. Explain that staff may record many progress assessments to identify gains made in reading, math, and/or language. 3. Explain that when staff enters functional scores for standard assessment categories (i.e., TABE or CASAS), the system will automatically display the participant's educational functioning level. *[Est. Time: 15 mins]*	Staff User Guide Chapter 6
9 ☐	2nd WIOA Activity Enrollment	As self-service practice, allow training participants to record activity *413 – Develop Service Strategies (IEP/ISS/EDP)*. The process will be similar to entering the initial WIOA program activity. Use today's date for actual begin date; enter projected end date 30 days from today. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	Same notes as previous activity. Select **413 – Develop Service Strategies (IEP/ISS/EDP)**. *[Est. Time: 5 mins]*	Staff User Guide Chapter 6 Page 16

Item	Activity	Overview	Details	User Guide
10 ☐	Individual Employment Plan (IEP)	The IEP (also called the Individual Service Strategy (ISS) or the Education Development Plan (EDP) identifies the employment and education goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve desired the outcome(s). *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Plan tab]*	1. The IEP functions the same, regardless of WIOA customer program group (i.e., Adult, Youth, etc.). 2. Check whether class wants additional practice recording sample goals and objectives for this younger youth participant. *[If the class wants to practice, here are the steps]* 1. Remind participants that similar to the initial skill assessment, we recorded the "development of the IEP" activity for reporting purposes, but must navigate elsewhere to manage details of the plan. 2. Explain that in addition to the IEP, the system also offers the Objective Assessment Summary (OAS). This is another living document that staff primarily manage on behalf of WIOA Youth and Wagner-Peyser veterans to identify barriers to employment, desired program activities and services, and desired program outcomes. 3. The purpose of the IEP is to document the giant steps (goals) and the baby steps (objectives) the customer must complete to achieve the desired plan outcome(s). 4. Explain the class will manage an OAS record on day 3. 5. Click **Create Individual Employment Plan/Service Strategy**. *Plan Tab Screen* 1. Click <u>Today</u> for IEP start date. 2. Select/confirm staff's LWIA/Region and office. 3. Click **Next**. *Goals Tab Screen* 1. Click <u>Add New Goal</u> to create re-employment goals. In Goal Information section, staff performs the following: 2. Select program affiliation (*WIOA*) 3. Select *Employment* for goal type. 4. Select *Short Term* for goal term. *There is no official definition for goal type and goal term. It is important, however, that staff interpret and use these*	Staff User Guide Chapter 4 Page 56

Item	Activity	Overview	Details	User Guide
			terms the same statewide. 5. Enter a brief goal description, such as *Secure F/T job with benefits*. 6. Click Today to establish goal. 7. Enter estimated completion date 60 days from now. 8. Skip actual completion date. 9. Maintain completion status of *Open*. 10. Explain that staff may use the Comments text box to provide more detail, if necessary. 11. Click **Save**. When the screen refreshes, the system displays the first of potentially many goals for this plan. 12. Click **Next**. *Objectives Tab Screen* 1. Explain there are two types of objectives for staff to choose from: Pre-defined and free-form objectives. *To create a pre-defined objective (from a list)…* 1. Click Select pre-defined objectives. In the Objective Information section, staff performs the following: 2. Click to select the newly created goal. 3. Confirm staff's LWIA/Region and office. 4. Select *WIOA* for program affiliation. 5. When ICC displays the list of pre-defined objectives, click the Resume Writing checkbox and click Today to establish start date. 6. Click the Review Date textbox. *By default, the system provides a 45-day review date. Staff can maintain or overwrite the date.* 7. Click **Save**. *To create a free-form objective…* 1. Click Add new objective from the Objectives Tab Screen. In the Objective Information section, staff performs the following: 2. Click to select the newly created goal.	

Item	Activity	Overview	Details	User Guide
			3. Confirm staff's LWIA/Region and office. 4. Select *WIOA* for program affiliation. 5. Ask the class to suggest a good objective (baby step) to help the customer become reemployed. Record your favorite response, or simply enter *Conduct job searches daily using ICC*. 6. Click Today to establish objective. 7. Click the Review Date textbox. In response, the system sets a 45-day review date that staff may edit. 8. Click **Save**. When the screen refreshes, the system displays the updated Objectives tab screen. 9. Click **Next**. *Services Tab Screen* 1. Explain this screen displays all services delivered under the program(s) selected for plan affiliation. This is helpful so staff won't have to exit the plan to confirm which services have already been provided to the customer. 2. Click Finish. In response, the system displays the updated Plan tab screen. 3. Explain that staff may only manage one IEP at a time, so they will click Edit to modify plan details as needed. *[Est. Time: 15 mins]*	
11 ☐	Record Support Service for WIOA Youth Participant	WIOA program participants can receive support services such as medical assistance to help them continue to receive planned program service. This lesson will serve as a review of the Adult/DW model, in terms of documenting and tracking fundable services. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Click Create Activity link. 2. Explain that the system will again display a wizard to guide staff, and they will click **Next** to save data entry on a screen-by-screen basis. *General Information Tab Screen* 1. Select *2E – Youth Out School* for customer program group. 2. Select/confirm LWIA/Region and office location. 3. Skip Agency Code; not required by State. 4. Skip Grant; only used if WIOA-eligible. 5. Click Select Activity Code. Select 482 – *Supportive Service – Medical.* 6. Actual Begin Date is the date training begins. Click	Staff User Guide Chapter 6 Page 23

Item	Activity	Overview	Details	User Guide
			Today. 7. Enter Projected End Date following instructor's lead. 8. Explain that the questions regarding distance learning and the individual training account (ITA) are reserved for federal reporting purposes. Although they are not required at this time, staff are encouraged to complete them to prepare for potential PIRL (Personal Individual Record Layout) requirements. 9. Confirm/select *Staff* for staff member's position. 10. Explain that authorized staff may perform case assignment from this page, and create a case note (after saving this page). *Service Provider Tab Screen* 1. Remind class that the selected customer program group, the LWIA/region, and the activity service code determine the display of selectable service providers and programs. 2. Click to complete service provider details following instructor's directions. *Enrollment Cost Tab Screen* Explain the following: 1. The displayed enrollment costs derive from account information maintained within the *Manage Providers* component along the left navigation menu. 2. Support service cost templates are either fee-based (occurs once) or unit-based (occurs more than once). An example of a unit-based support service is transportation assistance for several days. When staff enter the number of units, the system multiplies the base cost times the number of units. 3. If staff edit any line item details, the "master" record remains unchanged; edits only affect this enrollment record. 4. Authorized staff may click to select additional line items, and then click *Add*, to adjust the total enrollment cost automatically. 5. The system displays "Available" vs. "Obligated" cost amounts. When staff approve vouchers, the voucher	

Item	Activity	Overview	Details	User Guide
			amount(s) become obligated. *Financial Aid Tab Screen* 1. Maintain **No** default. *Enrollment Budget Tab Screen* 1. Explain that for fund tracking to occur, either the case manager or a fiscal agent must select the desired budget(s), also called fund stream(s). 2. This can be done now, when the enrollment record is being created, or at a later time. 3. Click [Click Here To Select a Budget]. 4. Remind participants that the system will display all eligible budgets based on the same criteria previously discussed: a. Activity service begin and end dates (because budgets are created by time period) b. Customer program group (i.e., Adult, Dislocated Worker, etc.) c. LWIA/region (budgets cover physical areas) d. Program (i.e., WIOA funds vs. TAA funds, etc.) e. Budget balance (is there enough to cover enrollment costs?) 5. Remind participants that staff may select multiple budgets. 6. Bottom line, this design must be flexible to account for the many ways Geographic Solutions' customers do business. 7. Select desired budget(s) following instructor's lead. ***BUDGET ALLOCATION*** 1. When screen refreshes, click Edit to allocate (or "earmark") funds. 2. Follow instructor's lead to enter funded amount. 3. Click **Save**. In response, the system automatically adjusts details in the *Enrollment Budget Information* section. *Budget Planning Tab Screen* 1. Explain that this screen displays funding obligation totals, in real time, based on voucher and payment management.	

Item	Activity	Overview	Details	User Guide
			2. Explain that similar to budget selection, either the case manager or a fiscal agent must create and approve the training voucher(s) to track expenditures. 3. This can be done now, when the enrollment record is being created, or at a later time. Approved *vouchers obligate funds. The voucher amount is the amount by which the selected budget is reduced.* ***ADD/APPROVE VOUCHER*** 1. Click [Add a Voucher]. The voucher window displays. *In the Summary section…* 1. ICC displays read-only information. *In the Remittance Address section…* 1. ICC displays the one stop location. *In the Manage Voucher section…* Explain the following: 1. ICC displays the current status of the voucher (*Active; Pending Approval*). 2. Unauthorized staff may complete voucher details for authorized staff (i.e., fiscal agent) to approve. 3. ICC will not withdraw funds unless the voucher status is APPROVED and all data entry has been successfully saved. 4. Click **Approved**. 5. Student ID and Reference No: text boxes are available for State tracking purposes and are not required. 6. Vouchers expire in one year. *In the Services Provided Between section…* 1. Enter the appropriate ending date. Ideally, this should match the activity service ending date. *In the Cost Details section…* 1. The Planned amount for each line item cost represents the cost limit.	

Item	Activity	Overview	Details	User Guide
			2. The Available amount for each line item cost is the difference between the planned amount and the sum total of approved vouchers for that line item. 3. ICC will prevent staff from entering an amount greater than the planned amount. 4. Staff may enter multiple vouchers (i.e., one for tuition, one for books, one for tools, etc.), the sum of which cannot exceed the planned amount for each line item. 5. Follow instructor's lead to complete cost details. *For one of the line items, enter an amount higher than the planned amount. When you click Save, the system will display an error message prompting staff to re-enter the correct amount.* 6. Click **Save**. 7. Click **OK** to accept the message alert. 8. Edit the appropriate line item entry. 9. Click **Save**. The system now displays the updated Budget Planning tab screen. 10. Click [+] to expand voucher details. 11. Explain that the ID # is system-generated. 12. Explain that if staff created multiple vouchers, the table would display one row for each. 13. Review the details displayed in the voucher table. *If the voucher remains in "Pending Approval" status, staff cannot remit payment in the next lesson.* ***ADD PAYMENT*** 1. Click [Add a Payment]. The payment window displays. 2. Explain there are many similarities between vouchers and payments, in terms of information displayed, data entry requirements, and business rules. *In the Summary and Voucher Details sections…* 1. ICC displays read-only information. *In the Manage Payments section…* Explain the following:	

Item	Activity	Overview	Details	User Guide
			1. ICC displays the current status of the voucher. 2. Unlike authorized staff may complete payment details (by selecting *Open* status) for authorized staff (i.e., fiscal agent) to approve. 3. Status selections include the following: a. *Open* – similar to approved. b. *Approved for Payment* – not for ICC. c. *Payment Hold* – payment cannot be processed due to insufficient documentation or approval. d. *Payment Offline* – not for ICC. e. *Payment Processed* – not for ICC. f. *Void* – deletes the voucher. 4. Click **Open**. 5. Click <u>Today</u> to record the payment date. 6. Enter a cash forecast date, which can be used to: a. Record the date that a cash draw-down is needed. b. Record the date that payment is due to a vendor. 7. Check # and Vendor Document # fields are used for State tracking purposes. *In the For Services Provided Between section…* 1. Enter the service end date. *In the Details section…* 1. The Vouchered amount for each line item cost represents the payment limit. 2. The Available amount for each line item cost is the difference between the vouchered amount and the sum total of approved payments for that line item. 3. ICC will prevent staff from entering an amount greater than the vouchered amount. 4. Staff may enter multiple vouchers (i.e., one for tuition, one for books, one for tools, etc.), the sum of which cannot exceed the planned amount for each line item. 5. Follow instructor’s lead to complete cost details.	

Item	Activity	Overview	Details	User Guide
			Staff clicks checkbox once final payment has been submitted. *Closure Information Tab Screen* 1. Explain that training services that could result in credential attainment require additional data entry by staff. 2. Because the activity services has a future end date, click **Finish**. *[Est. Time: 30 mins]*	
12 ☐	Record Measurable Skills Gain for PIRL Reporting Requirements	The U.S. Dept of Labor is actively defining reporting requirements for the Participant Individual Record Layout (PIRL). To prepare case managers/staff for this data collection effort, Geographic Solutions added this data collection resource to comply with *known* federal guidance. There are limited business rules in this screen, and delivery will not include document management, case note functionality, or a formatted print form.	1. Explain that the following are newly defined measures within which staff capture skills gains: a. PIRL 1807-Post Secondary Transcript/Report Card b. PIRL 1808-Secondary Transcript/Report Card c. PIRL 1809-Training Milestone d. PIRL 1810-Skills Progression 2. Click Create Measurable Skills Gain. *In the General Information section…* 1. Staff select/confirm their LWIA/region and office. *In the Skills Attainment Information section…* 1. Select the individual's skill type. 2. Click Today to enter the skill attainment date. 3. Select the individual's achievement type. 4. Click Verify to select a desired form of attainment verification. *In the Staff Information section…* 1. Explain that staff can create a case note to formally document this achievement. 2. Explain that staff may access the Case Notes tab screen to access the case note, too. 3. Click S**ave**. *[Est. Time: 15 mins]*	
13 ☐	Prepare for WIOA Program Closure	Close out all program services in preparation for case closure.	Explain the following: 1. How system would conduct soft exit based on the	Staff User Guide Chapter 6

Item	Activity	Overview	Details	User Guide
		[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Plan tab]	services/dates displayed. 2. There is no specific 'close order' required. 3. Training services and Youth records will require more data entry to close service(s). *[Est. Time: 15 mins]*	
14 ☐	IEP/ISS Closeout	Practice closing objectives, then goals, and then plan. *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Plan tab]*	Explain how staff will work amongst these three tabs to effectively record and actual end date, status, and status reason to end plan details. *[Est. Time: 5 mins]*	Staff User Guide Chapter 4
15 ☐	WIOA Case Closure Form	The WIOA Case Closure form is a bridge between active program enrollment and program exit. Completion of the Case Closure form enables staff to record WIOA follow-up services as needed. *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Programs tab]*	Explain the following: 1. Required to record WIOA follow-up activities for participant (i.e., counseling, support services, etc.). 2. WIOA case closure is NOT required. 3. Mainly used to record performance indicators prior to program exit (employment, credential attainment, etc.) 4. Completed form ceases all planned WIOA services. 5. Youth tab displayed even for non-youth participants. *[Est. Time: 15 mins]*	Staff User Guide Chapter 6
16 ☐	WIOA Follow-up Activities	Discussion on how specific follow-up activities can be added to the enrollment table after Case Closure is completed.	1. All services display 'F' in front of code number. 2. Recording follow-up services same as planned services. 3. No need to complete entire record; just perform partial demonstration on 1st screen. Staff would complete the remaining enrollment tab screens as they would otherwise. *[Est. Time: 5 mins]*	Staff User Guide Chapter 6
17 ☐	WIOA Outcome Form	Discuss "Soft" vs. "Hard" Exits. Staff need only complete a program outcome form if the customer satisfies a global exclusion.	1. The system is configured to perform combined soft exits (WP, WIOA, and TRADE). 2. Simple function like job search could re-start 90-day countdown process for ALL programs. 3. Soft exit generally prescribed, but staff may also complete hard exits. These are generally used for global exclusion reasons. 4. System automatically creates case note based on "exit	Staff User Guide Chapter 6

Item	Activity	Overview	Details	User Guide
			reason" details that staff must enter. *[Est. Time: 10 mins]*	
18 ☐	Quarterly WIOA Follow-up Records	Discuss purpose and structure of the quarterly follow-up link.	1. WIOA quarterly follow-ups only required if individual soft exited (or hard exited citing NON-global exclusion). 2. System determines "due by" date for required forms. 3. Staff may create local follow-ups as often as necessary (these are NOT federally reported). 4. Staff may capture credential attainment info using follow-up forms if they couldn't when service closed. 5. *WIOA Failed Attempts* section only required to record failed contact attempts. When 'X' failed attempts reached, system no longer required follow-up for that quarter. *[Est. Time: 15 mins]*	Staff User Guide Chapter 6
19 ☐	Manage Follow-Up	This feature in staff's left navigation menu provides search criteria to identify which customers require quarterly follow ups for each quarter, as well as the type of follow up required (1st quarter follow up, 2nd quarter follow up, etc.). *[Location = left navigation menu]*	1. Click **Manage Follow Up**. 2. Click WIOA Exiters for Follow-Up. 3. Explain that staff select the desired search criteria for required items, minimally. 4. When they click Search, the system will display a hyperlink to each client record, permitting staff to complete the quarterly follow up. *Staff may not be able to perform this function in the Training environment.* *[Est. Time: 15 mins]*	Staff User Guide Chapter 20
20 ☐	Conduct Final Review	End the day with a short review of the content covered.	The instructor will summarize highpoints of the day's events, and invite questions from training participants. *[Est. Time: 5 mins]*	
21 ☐	Dismissal	End of Day 3	Have participants log off computer, as directed by lab staff.	

Day 4: TAA Program Case Management Training

https://trainingta2.geosolinc.com/vos18000000/vosnet/Default.aspx?responsive=true

Item	Activity	Overview	Details	User Guide
1 ☐	Day 3 Review	Open with Question and Answers session to cover material from previous day	Allow participants to ask questions if they have any. Instructors will provide brief overview of instructional content. *[Est. Time: 15 mins]*	
2 ☐	Provide TAA Program Overview	The Trade Adjustment Assistance (TAA) Program is a federal program that provides aid to US workers who have lost their jobs as a result of foreign trade. The TAA program seeks to provide these trade-affected workers with opportunities to obtain the skills, resources, and support they need to become reemployed.	Explain the following: 1. The purpose of the program, as explained in the *Overview*. 2. The TAA Case Management module is similar in design to the WIOA Case Management module, where staff start with the program application, establish program participation, document case notes, manage a service strategy, manage program enrollment (service delivery), prepare for the individual’s soft exit from the TAA program, and manage quarterly follow up services, if applicable. 3. There are forms/steps that are unique to the TAA program, such as training waivers, approved provider training applications, and other forms that we will see. 4. Customers can be co-enrolled in more than one program (for example WIOA and Trade), or the TAA program only. 5. To demonstrate the TAA Case Management module, we will create a new customer. *[Est. Time: 5 mins]*	Staff User Guide Chapter 23 QRC
3 ☐	Create (Individual) Client Account	Participants will use Registration Template handout to create similar client profiles. *[Location: Manage Individuals ► Create an Individual]*	1. Use training handout (Registration Template) to help participants complete this initial duty. 2. Stress importance of “best practices” by first searching for individual before attempting to complete system registration on their behalf (especially with UI imports). 3. Stress the importance of documenting job seeker login info on their training handouts (Registration Template). 4. Assign last two digits of SSN for each participant. 5. Select **Manage Individuals ► Create an Individual**. 6. Allow participants to work on their own. Instructor enters data to create individual account, too.	

Item	Activity	Overview	Details	User Guide
			7. Following system registration, the system will display the individual's name under *Currently Managing* in top left corner of the screen. 8. Explain that if changes must be made to system registration data, users should not click the Back button. They should access the General Information tab of the individual's Personal Profile. *If staff click the individual's name under Currently Managing, the system displays their profile folders. Staff who are new to the system should click to expand each folder to learn file locations more quickly and easily.* *[Est. Time: 15 mins]*	
4 ☐	Complete TAA Eligibility Determination	Participants will follow the instructor's example to complete the Trade program application. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Explain that staff clicks + or – to show or hide program info. 2. Explain that class must stay together! 3. Explain that web pages will update based on staff selection, so allow pages to reload. 4. Confirm that all participants are using the same form and managing their own individuals, not yours!!! 5. *Tab/*Screen *1 (Start):* select/confirm staff's office. 6. *Tab/Screen 2 (Contact Info):* explain that data requirements should already be met. 7. *Tab/Screen 3 (Demographics):* complete minimal data requirements, if needed. 8. *Tab/Screen 4 (Veterans)*: confirm may already be done ("No"). *9. Tab/Screen 5 (Employment):* explain this screen is used to record employment details from the Trade-affected employer, as well as new employer details, if applicable. The model we create here can be used for future training classes, so pay close attention to the instructor's lead. 10. Tab/Screen 6 (*Public Assistance*): select options that apply. 11. Tab/Screen 7 (*Ind Barriers*): complete item. 12. Tab/Screen 8 (*Eligibility*): Application Eligibility section is	Staff User Guide Chapter 7

Item	Activity	Overview	Details	User Guide
			system-set. ✓ *Staff Info* section – staff may perform case assignment if trainer did the necessary setup; participants may assign individual to themselves. ✓ *TAA Calculations* section – displays deadlines for various program requirements after staff saves the page. 13. Explain the following options: ✓ *Finish* – saves application and displays Programs tab screen. ✓ *Next* – Displays TAA enrollment form. System auto-fills the TAA participation form (normally the next step). 14. Click **Finish**. Point out: Edit Wizard, view one tab screen at a time Verification Summary for required data Print capability, which includes signature panel *Clicking completed TAA app link = View Mode.* 15. Explain that system displays application details within hyperlink name. *[Est. Time: 20 mins]*	
5 ☐	Create TAA Participation Form	This form, similar to the WIOA Participation form, presents the applicant's current status for reporting purposes. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Explain that if staff clicks *Finish* on the TAA Application tab screen, they manually must complete the TAA Participation form. 2. If staff clicks *Next* on the TAA Application tab screen, the system automatically will complete the Participation form and display the program enrollment form to record the applicant's first service. 3. Follow the trainer's lead to complete the brief Participation form, clicking **Next** to continue. *[Est Time: 2 mins]*	Staff User Guide Chapter 7
6 ☐	Manage TAA Program Enrollment	Participants will record the first program service, thus establishing	1. Explain that the system will again display a wizard to guide staff, and they will click **Next** to save data entry on a	Staff User Guide Chapter 7

Item	Activity	Overview	Details	User Guide
		program participation. It is not uncommon for TAA customers to receive training as their initial service. In such instances, most workforce boards would normally conduct an initial skills assessment to ensure the candidate is capable of managing training responsibilities. In this instance, however, we will suggest a scenario where the desired training is not available at this time, so staff will record a training waiver. Record service code *236 – Waiver – Training not Available.* Trade activity code 102 – Initial Assessment. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	screen-by-screen basis. *General Information Tab Screen* 1. Select *TA1 – TAA* for the customer program group. 2. Explain that Customer Program Group list box displays all eligibility groups (from WIOA app). If the desired group is not listed, staff must troubleshoot the WIOA application. *First check simple remedies, such as citizenship and selective service registration statuses. Then review each page, in order, to identify missing or errant data entry.* 3. Select/confirm LWIA/Region and office location. 4. Skip Agency Code; not required by State. 5. Skip Grant; only used if WIOA-eligible. 6. Click Select Activity Code. Select *236 – Waiver – Training not Available.* 7. Explain that staff selections for customer program group, region, and activity code affect info displayed on Service Provider list (next tab screen). 8. Click Today to enter activity's projected end date. 9. Explain WIOA Participation form controls actual begin date, which is un-editable. This is why staff should only complete WIOA participation form when they're ready to enroll client in WIOA program. 10. Explain that first service establishes program participation (client is then included in performance reporting). 11. Confirm/select *Staff* for staff member's position. 12. Explain that authorized staff may perform case assignment from this page, and create a case note (after saving this page). *Service Provider Tab Screen* 1. Explain that data relationships established on tab/screen 1 control the display of selectable service providers and programs. 2. Explain that the system will auto fill items when/if there is only one possible response\selection. 3. Explain that the occupational training code is only required	

Item	Activity	Overview	Details	User Guide
			for training services ('300' activity codes). 4. Explain that all provider information pulls from *Manage Providers* component (shown in left navigation menu). 5. Click to complete service provider details following instructor's directions. *Tab Screens 3-6* 1. Explain system bypasses tab screens 3 through 6 because the selected service is NOT fundable (therefore, tabs are not required). *Closure Information Tab Screen* 1. Explain staff may close service now or later (requires end date and completion code if now). *If staff does not complete the initial WIOA enrollment form, they must redo the WIOA participation form when they re-attempt program enrollment on behalf of the customer ("2-for-1 proposition").* 2. Click <u>Today</u> for actual activity end date and select *Successful Completion* for activity status. 3. Click *Finish* to save data entry. 4. Confirm successful enrollment by viewing service table on Programs tab screen now displayed. *[Est. Time: 10 mins]*	
7 ☐	Demonstrate Case Note Functionality	The Case Notes tab of the staff's General Profile is where staff can record details of a customer's program participation, or other pertinent data. This lesson will serve as a review of the Adult/DW model. *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff's Profile ▶ General Profile ▶ Case Notes tab]*	1. Explain that Case Notes tab maintains notes for ALL programs. 2. Explain that staff privileges determine whether functions may be performed (deleting case notes, viewing edit history, etc.). 3. Explain that system configuration determines whether staff must first complete program application before creating case note for that program (App ID may be required). WP program is automatically active, due to system configuration (system registration = WP participation). 4. Explain that case note templates automatically pre-fill case notes to reduce effort; staff can modify case note details.	Staff User Guide Chapter 4 QRC

Item	Activity	Overview	Details	User Guide
			5. Click View Case Note Templates link. Existing templates will be displayed here. 6. Click Create New Template to perform class activity. 7. Explain that staff privileges allow template sharing, and that staff may be as detailed as they wish when creating templates. 8. Enter template details; click **Save**. 9. Confirm case note template is saved (will be displayed on list screen). Click **Return to Previous Page**. 10. Click **Add New Case Note** to conduct next class activity. Explain staff may choose their template to auto-fill case note details; otherwise, staff must manually enter details. *Suppressed case notes means only staff members with access to case notes for this workforce region may view suppressed case notes. This protects the individual, should confidential or sensitive information be entered.* 11. Enter contact date. 12. Explain that staff may also send case note to customer as system message (final check box). 13. Click **Save**. 14. On Case Note List screen, simulate: ✓ Filtering capability ✓ Click-column-heading-to-sort capability ✓ Printing case notes ✓ How to view/modify existing case note *[Est. Time: 15 mins]*	
8 ☐	TAA Waiver Entry and Waiver Review	If the participant does not enroll in training by the specified date, staff must create a training waiver to, among other things, preserve the customer's Trade Readjustment Allowance (TRA) benefits. Participants will create a training waiver (reason = Training not Available), then revoke the waiver and enroll their individuals in a	System configuration controls how many program forms staff must utilize to manage TRADE participants (for example, review conducted every 28 days, not to exceed 26 total). Instructors will review these settings to demonstrate the various program forms required. *Create Waiver* 1. Click Create Waiver Entry. 2. Enter waiver issue date. 3. Select waiver reason (Training Not Available).	Staff User Guide Chapter 7

Item	Activity	Overview	Details	User Guide
		training program. *This is similar to recording a program service to develop an IEP, for example, where staff must also manage the resource itself.* *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Programs tab]*	4. Click **Save**. *Conduct 1st Waiver Review* 1. From the Programs tab screen, click the Edit Waiver Entry link. 2. Explain that ICC creates the entire review schedule based on State settings (28-day reviews, 26 total). *Training participants will conduct waiver entry and reviews same day. In the real world, they will be conducted every 28 days.* 3. Click Pending to open 1st review. 4. Enter waiver review date. 5. Select *Yes*, Met Review Requirements 6. Select *No*, Waiver Reason Has not Changed. 7. Select *Yes*, Waiver is Still in Effect. 8. Click **Save**. 9. Click **Cancel** to exit waiver schedule screen. *[Est. Time: 25 mins]*	
9 ☐	TAA Employment Plan	The IEP [also called the Individual Service Strategy (ISS) or the Education Development Plan (EDP)] identifies the employment and education goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve the desired outcome(s). *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Programs tab]*	1. Remind participants that similar to the initial skill assessment, we recorded the “development of the IEP” activity for reporting purposes, but must navigate elsewhere to manage details of the plan. 2. Explain that in addition to the IEP, the system also offers the Objective Assessment Summary (OAS). This is another living document that staff primarily manage on behalf of WIOA Youth and Wagner-Peyser veterans to identify barriers to employment, desired program activities and services, and desired program outcomes. 3. The purpose of the IEP is to document the giant steps (goals) and the baby steps (objectives) the customer must complete to achieve the desired plan outcome(s). 4. Explain the class will manage an OAS record on day 3. 5. Click **Create Individual Employment Plan/Service Strategy**. *Plan Tab Screen*	Staff User Guide Chapter 4 Page 56

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			1. Click <u>Today</u> for IEP start date. 2. Select/confirm staff's LWIA/Region and office. 3. Click **Next**. *Goals Tab Screen* 1. Click <u>Add New Goal</u> to create re-employment goals. In Goal Information section, staff performs the following: 2. Select program affiliation (*WIOA*) 3. Select *Employment* for goal type. 4. Select *Short Term* for goal term. *There is no official definition for goal type and goal term. It is important, however, that staff interpret and use these terms the same statewide.* 5. Enter a brief goal description, such as *Secure F/T job with benefits*. 6. Click <u>Today</u> to establish goal. 7. Enter estimated completion date 60 days from now. 8. Skip actual completion date. 9. Maintain completion status of *Open*. 10. Explain that staff may use the Comments text box to provide more detail, if necessary. 11. Click **Save**. When the screen refreshes, the system displays the first of potentially many goals for this plan. 12. Click **Next**. *Objectives Tab Screen* 1. Explain there are two types of objectives for staff to choose from: Pre-defined and free-form objectives. *To create a pre-defined objective (from a list)…* 1. Click <u>Select pre-defined objectives</u>. In the Objective Information section, staff performs the following: 2. Click to select the newly created goal. 3. Confirm staff's LWIA/Region and office. 4. Select *WIOA* for program affiliation. 5. When ICC displays the list of pre-defined objectives, click	

Item	Activity	Overview	Details	User Guide
			the Resume Writing checkbox and click Today to establish start date. 6. Click the Review Date textbox. *By default, the system provides a 45-day review date. Staff can maintain or overwrite the date.* 7. Click **Save**. *To create a free-form objective…* 1. Click Add new objective from the Objectives Tab Screen. In the Objective Information section, staff performs the following: 2. Click to select the newly created goal. 3. Confirm staff's LWIA/Region and office. 4. Select *WIOA* for program affiliation. 5. Ask the class to suggest a good objective (baby step) to help the customer become reemployed. Record your favorite response, or simply enter *Conduct job searches daily using ICC*. 6. Click Today to establish objective. 7. Click the Review Date textbox. In response, the system sets a 45-day review date that staff may edit. 8. Click **Save**. When the screen refreshes, the system displays the updated Objectives tab screen. 9. Click **Next**. *Services Tab Screen* 1. Explain this screen displays all services delivered under the program(s) selected for plan affiliation. This is helpful so staff won't have to exit the plan to confirm which services have already been provided to the customer. 2. Click Finish. In response, the system displays the updated Plan tab screen. 3. Explain that staff may only manage one IEP at a time, so they will click Edit to modify plan details as needed. *[Est. Time: 15 mins]*	

Item	Activity	Overview	Details	User Guide
10 ☐	Preparing for Training: The TAA Approved Training Application	Participants must meet the standard requirements for approved training in the TAA program. *This form may be turned off by the system administrator.* *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	Participants complete a set of *Yes/No* statements and save the form. In edit mode, staff may re-open the Approved Training application to record training provider details. *[Est. Time: 5 mins]* *Although this is a logical flow/sequence, the Training site required staff to first create the Transportation Assistance application, then the Approved Training Application, then the Training activity. DWD said it did not prefer this sequence.*	Staff User Guide Chapter 7
11 ☐	Eligibility for Transportation Assistance	This application form helps full-time training participants recoup a portion of their travel expenses if training location exceeds maximum driving distance. *This form may be turned off by the system administrator.* *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	Complete application as follows: ✓ *Tab 1* – establish application date ✓ *Tab 2* – capture training provider and location details ✓ *Tab 3* – calculate approved training assistance amount ***Note**: Only use federal per diem info if State has no established rates.* *[Est. Time: 10 mins]*	Staff User Guide Chapter 7
12 ☐	TAA Enrollment Service – Training *DWD suggested that for "best practices," staff should revoke the training waiver after they confirmed that training has begun.*	Attendees will practice entering and managing details for a fundable TAA training service. In this exercise, training participants will see the Advanced Individual Fund Tracking (AIFT) module at work. Whether performed by case managers or fiscal staff, the following will occur: ✓ Budget selection ✓ Voucher creation, approval, and management ✓ Payment creation and management	1. Click Create Activity link. 2. Explain that the system will again display a wizard to guide staff, and they will click **Next** to save data entry on a screen-by-screen basis. *General Information Tab Screen* 1. Select *TA1 – TAA* for customer program group. 2. Select/confirm LWIA/Region and office location. 3. Skip Agency Code; not required by State. 4. Skip Grant; only used if WIOA-eligible. 5. Click Select Activity Code. Select *328 – Occupational Skills Training – Non-Approved Provider (no ITA).* 6. Explain that a training service is a good example of how multiple dates may come into play. For example: ✓ *Projected Begin Date* can hold a future date, if known,	Staff User Guide Chapter 7

Item	Activity	Overview	Details	User Guide
		[Location: Manage Individuals ▶ Assist an Individual ▶ Staff Profiles ▶ Case Management Profile ▶ Programs tab]	but it is not a required field. If staff use this field, they must edit this enrollment form at a later time to provide an *actual* begin date, which cannot be a future date. 7. Actual Begin Date is the date training begins. Click Today. 8. Enter Projected End Date following instructor's lead. 9. Explain that additional questions are reserved for federal reporting purposes. Although they are not required at this time, staff are encouraged to complete them to prepare for potential PIRL (Personal Individual Record Layout) requirements. 10. Confirm/select *Staff* for staff member's position. 11. Explain that authorized staff may perform case assignment from this page, and create a case note (after saving this page). *Service Provider Tab Screen* 1. Remind class that the selected customer program group, the LWIA/region, and the activity service code determine the display of selectable service providers and programs. 2. Click to complete service provider details following instructor's directions. *Enrollment Cost Tab Screen* Explain the following: 1. The displayed enrollment costs derive from account information maintained within the *Manage Providers* component along the left navigation menu. 2. If staff edit any line item details, the "master" record remains unchanged; edits only affect this enrollment record. 3. Authorized staff may click to select additional line items, and then click *Add*, to adjust the total enrollment cost automatically. 4. The system displays "Available" vs. "Obligated" cost amounts. When staff approve vouchers, the voucher amount(s) become obligated.	

Item	Activity	Overview	Details	User Guide
			Financial Aid Tab Screen 1. Explain that State policy will determine whether staff can or must apply financial aid to reduce enrollment costs for this service. To demonstrate: 2. Click the link to access the FAFSA website. 3. Explain this is general information to help identify various sources of financial aid. 4. Close the browser window. 5. Click **Yes** back on the Financial Aid tab screen. 6. Click [Click Here to Add Financial Aid]. 7. From popup window, click Pell Grant. 8. In Pell Grant section, select *Amount Applicable towards Service Cost*, although staff could choose otherwise. 9. Explain this is a decision point; only authorized staff can approve the status of financial aid. 10. Click **Awarded**; explain that ICC will not apply financial aid otherwise. 11. In *Awarded* text box, enter **1500.00**. 12. In *budget toward Service Cost* text box, enter **1500.00**; explain that amount could be less, but not more. 13. Click **Calculate**. In response, the system adjusts the enrollment cost accordingly. *This is demo only; do not click Next without first deleting financial aid details.* 14. Click **No** for *Financial Aid Applicable* to remove $1500.00 Pell Grant. *Enrollment Budget Tab Screen* 1. Explain that for fund tracking to occur, either the case manager or a fiscal agent must select the desired budget(s), also called fund stream(s). 2. This can be done now, when the enrollment record is being created, or at a later time. 3. Click [Click Here To Select a Budget].	

Item	Activity	Overview	Details	User Guide
			4. Explain that the system will display all eligible budgets based on criteria such as the following: a. Activity service begin and end dates (because budgets are created by time period) b. Customer program group (i.e., Adult, Dislocated Worker, etc.) c. LWIA/region (budgets cover physical areas) d. Program (i.e., WIOA funds vs. TAA funds, etc.) e. Budget balance (is there enough to cover enrollment costs?) 5. Explain that staff may select multiple budgets. For example: a. Budget “A” for semester 1; budget “B” for semester 2. b. Budget “A” for tuition; budget “B” for books and supplies. c. Shared expenditures between departments. 6. Bottom line, this design must be flexible to account for the many ways Geographic Solutions’ customers do business. 7. Select desired budget(s) following instructor’s lead. ***BUDGET ALLOCATION*** 1. When screen refreshes, click Edit to allocate (or “earmark”) funds. 2. Follow instructor’s lead to enter funded amount. 3. Click **Save**. In response, the system automatically adjusts details in the *Enrollment Budget Information* section. *Budget Planning Tab Screen* 1. Explain that this screen displays funding obligation totals, in real time, based on voucher and payment management. 2. Explain that similar to budget selection, either the case manager or a fiscal agent must create and approve the training voucher(s) to track expenditures. 3. This can be done now, when the enrollment record is being created, or at a later time. Approved *vouchers obligate funds. The voucher amount is the amount by which the selected budget is reduced.*	

			ADD/APPROVE VOUCHER 1. Click [Add a Voucher]. The voucher window displays. *In the Summary section…* 1. ICC displays read-only information. *In the Remittance Address section…* 1. ICC displays the one stop location. *In the Manage Voucher section…* Explain the following: 1. ICC displays the current status of the voucher (*Active; Pending Approval*). 2. Unauthorized staff may complete voucher details for authorized staff (i.e., fiscal agent) to approve. 3. ICC will not withdraw funds unless the voucher status is APPROVED and all data entry has been successfully saved. 4. Click **Approved**. 5. Student ID and Reference No: text boxes are available for State tracking purposes and are not required. 6. Vouchers expire in one year. *In the Services Provided Between section…* 1. Enter the appropriate ending date. Ideally, this should match the activity service ending date. *In the Cost Details section…* 1. The Planned amount for each line item cost represents the cost limit. 2. The Available amount for each line item cost is the difference between the planned amount and the sum total of approved vouchers for that line item. 3. ICC will prevent staff from entering an amount greater than the planned amount. 4. Staff may enter multiple vouchers (i.e., one for tuition, one for books, one for tools, etc.), the sum of which cannot exceed the planned amount for each line item. 5. Follow instructor's lead to complete cost details.	

Item	Activity	Overview	Details	User Guide
			For one of the line items, enter an amount higher than the planned amount. When you click Save, the system will display an error message prompting staff to re-enter the correct amount. 6. Click **Save**. 7. Click **OK** to accept the message alert. 8. Edit the appropriate line item entry. 9. Click **Save**. The system now displays the updated Budget Planning tab screen. 10. Click [+] to expand voucher details. 11. Explain that the ID # is system-generated. 12. Explain that if staff created multiple vouchers, the table would display one row for each. 13. Review the details displayed in the voucher table. *If the voucher remains in "Pending Approval" status, staff cannot remit payment in the next lesson.* ***ADD PAYMENT*** 1. Click [Add a Payment]. The payment window displays. 2. Explain there are many similarities between vouchers and payments, in terms of information displayed, data entry requirements, and business rules. *In the Summary and Voucher Details sections…* 1. ICC displays read-only information. *In the Manage Payments section…* Explain the following: 1. ICC displays the current status of the voucher. 2. Unlike authorized staff may complete payment details (by selecting *Open* status) for authorized staff (i.e., fiscal agent) to approve. 3. Status selections include the following: a. *Open* – similar to approved. b. *Approved for Payment* – not for ICC.	

Item	Activity	Overview	Details	User Guide
			c. *Payment Hold* – payment cannot be processed due to insufficient documentation or approval. d. *Payment Offline* – not for ICC. e. *Payment Processed* – not for ICC. f. *Void* – deletes the voucher. 4. Click **Open**. 5. Click Today to record the payment date. 6. Enter a cash forecast date, which can be used to: a. Record the date that a cash draw-down is needed. b. Record the date that payment is due to a vendor. 7. Check # and Vendor Document # fields are used for State tracking purposes. *In the For Services Provided Between section…* 1. Enter the service end date. *In the Details section…* 1. The Vouchered amount for each line item cost represents the payment limit. 2. The Available amount for each line item cost is the difference between the vouchered amount and the sum total of approved payments for that line item. 3. ICC will prevent staff from entering an amount greater than the vouchered amount. 4. Staff may enter multiple vouchers (i.e., one for tuition, one for books, one for tools, etc.), the sum of which cannot exceed the planned amount for each line item. 5. Follow instructor's lead to complete cost details. *Staff clicks checkbox once final payment has been submitted.* *Closure Information Tab Screen* 1. Explain that training services that could result in credential attainment require additional data entry by staff. 2. Because the activity services has a future end date, click **Finish**. *[Est. Time: 30 mins]*	

Item	Activity	Overview	Details	User Guide
13 ☐	Preparing for Training: Waiver Revocation	Participants will practice revoking a waiver so the customer may pursue a training opportunity. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Staff's ability to revoke a TAA training waiver is essentially a two-step process. In Step 1, staff changes the status of the waiver to *REVOKED*. As a result, the system will no longer require 28-day reviews, and will change the status of the *Pending* reviews to *Closed*. In Step 2, staff closes the TAA Training Waiver service, which will be done later. *Conduct 2nd Waiver Review to Revoke it* 1. From the Programs tab screen, click the Edit Waiver Entry link. 2. Click Pending to open 2nd review. 3. Enter waiver review date. 4. Select *Yes*, Met Review Requirements 5. Select *No*, Waiver Reason Has not Changed. 6. Select *No*, Waiver is Still in Effect. 7. Select *Revoked* for reason no longer in effect. 8. Select *Waiver Revoked – Entered Training* for revocation reason. 9. Click **Save**. 10. Explain that ICC resets to *Closed* the review status for the remaining waiver reviews. *[Est. Time: 10 mins]*	Staff User Guide Chapter 7
14 ☐	Managing TAA Training Benchmarks *DWD suggested that case notes completed every 30 days would suffice.*	The TAA training benchmark screen enables staff to record training status updates. Benchmark reviews are required every 60 days. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. When staff clicks the TAA Benchmark View link, the system will display existing table entries. 2. Staff clicks the Add Training Benchmark link to manually complete the Training Benchmark Information section, which requires brief data entry for some items, along with a case note. *[Est. Time: 10 mins]*	Staff User Guide Chapter 7
15 ☐	Trade Readjustment Allowance (TRA) Payment View *DWD suggested skipping this activity. Staff privileges will*	The TRA Payment View within the TAA program section on the Programs tab is an area for viewing the actual TRA income support payments to the individual who has exhausted unemployment	Participants can click *TRA Payment View* ► *Add TRA payment* if they want to see the fields required for manual data entry. Otherwise, data displayed will be from file import from the State. *[Est. Time: 2 mins]*	Staff User Guide Chapter 7

Item	Activity	Overview	Details	User Guide
	not permit access to this feature.	compensation and who is an active participant in the TAA program. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*		
16 ☐	Record Measurable Skills Gain for PIRL Reporting Requirements	The U.S. Dept of Labor is actively defining reporting requirements for the Participant Individual Record Layout (PIRL). To prepare case managers/staff for this data collection effort, Geographic Solutions added this data collection resource to comply with *known* federal guidance. There are limited business rules in this screen, and delivery will not include document management, case note functionality, or a formatted print form.	1. Explain that the following are newly defined measures within which staff capture skills gains: a. PIRL 1807-Post Secondary Transcript/Report Card b. PIRL 1808-Secondary Transcript/Report Card c. PIRL 1809-Training Milestone d. PIRL 1810-Skills Progression 2. Click Create Measurable Skills Gain. *In the General Information section…* 1. Staff select/confirm their LWIA/region and office. *In the Skills Attainment Information section…* 1. Select the individual's skill type. 2. Click Today to enter the skill attainment date. 3. Select the individual's achievement type. 4. Click Verify to select a desired form of attainment verification. *In the Staff Information section…* 1. Explain that staff can create a case note to formally document this achievement. 2. Explain that staff may access the Case Notes tab screen to access the case note, too. 3. Click **Save**. *[Est. Time: 15 mins]*	
17 ☐	Preparation for TAA Program Soft Exit	Assisting the TAA participant, staff will close out all program services in preparation for case closure. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles*	Explain 1. How system will conduct soft exit based on the services/dates displayed. 2. There is no specific 'close order' required. 3. Training services and Youth records will require more data	Staff User Guide Chapter 7

Item	Activity	Overview	Details	User Guide
		► Case Management Profile ► Programs tab]	entry to close service(s). *[Est. Time: 15 mins]*	
18 ☐	TAA Case Closure vs. Case Outcome	Review the difference between case closure and case outcome (aka hard exit). *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	Explain: 1. TAA case closure is NOT a system requirement. 2. Mainly used to record performance indicators prior to program exit (employment, credential attainment, etc.). 3. Case closure represents the cessation of TAA service delivery, but can be deleted if services must continue. 4. The system is configured to perform combined soft exits (WP, WIOA, and TRADE). 5. Simple function like self-service job search could re-start 90-day countdown process for ALL programs. 6. Soft exit generally prescribed, but staff may also complete hard exits. These are generally used for global exclusion reasons. 7. System automatically creates case note based on program exit details staff must enter. *[Est. Time: 15 mins]*	Staff User Guide Chapter 7
19 ☐	Conduct Final Review	End the day with a short review of the content covered.	The instructor will summarize highpoints of the day's events, and invite questions from training participants. *[Est. Time: 5 mins]*	
20 ☐	Dismissal	End of Day 4	Have participants log off computer, as directed by lab staff.	

Day 5: Miscellaneous Training

https://trainingta2.geosolinc.com/vos18000000/vosnet/Default.aspx?responsive=true

Item	Activity	Overview	Details	User Guide
1 ☐	Day 4 Review	Open with Question and Answers session to cover material from previous day	Allow participants to ask questions if they have any. Instructors will provide brief overview of instructional content. *[Est. Time: 15 mins]*	
2 ☐	Introduce Generic Program Case Management	The Jobs for America's Graduates program (JAG) is an example of a generic program. It is instituted and managed regionally, not federally, so federal requirements for programs like WIOA and TAA do not apply. The ICC system provides the same case management tools and resources to generic program staff as it does federal program staff. These include case notes, skills assessments, individual employment plans, service tracking and reporting, and fiscal tracking if generic program services are fundable. Just like with federal programs, staff privileges control the extent to which staff may access generic program information. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	Explain the following: 1. Click + to open and – to close program details. 2. By comparison, the application for a generic program is far shorter and quicker to complete than an application for a federal program. 3. The system does not conduct formula eligibility determination as it does for the WIOA program. Staff more-or-less know which customers can participate in and benefit from program services. 4. When staff click Next at the bottom of each page, the system performs edit checks similar to those it performs when staff complete a federal program application. 5. Unlike federal programs, staff do not complete a program participation form. (Confirm class's understanding of this form.) *[Est. Time: 2 mins]*	Staff User Guide Chapter 9
3 ☐	Complete Program Application	Identify similarities and differences between Generic Program application and federal program application.	1. Click + to open and – to close program details. 2. Click Create Generic Programs. 3. Complete the application following the instructor's lead. *[Est. Time: 5 mins]*	Staff User Guide Chapter 9

Item	Activity	Overview	Details	User Guide
		[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]		
4 ☐	Perform Program Enrollment (Service Delivery)	Services within the JAG program may or may not be fundable. The system is capable of tracking costs associated with a fundable generic program. The steps staff perform to conduct program enrollment are virtually identical to those performed for federal program enrollment. This exercise will reinforce former enrollment activities for both the WIOA and TAA programs. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]*	1. Click Create Activity. 2. Record activity *104 – Workshop*. 3. Ask the class to lead this activity instead of the instructor explaining each tab screen. Ask questions to prompt participants. This will help evaluate how well they learned the former activity lessons. *[Est. Time: 5 mins]*	Staff User Guide Chapter 9
5 ☐	Use Case Management Tools	Case management tools previously used – case notes, individual employment plan, skills assessments, etc. – also apply to Generic Program management. If the class would like additional practice, training participants can use these tools. *[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile]*	1. Explain that the same case management tools used for previous activity lessons also apply to generic program participants. 2. Check whether the class would like additional practice using these tools. Provide time for training participants to practice creating a case note, an employment plan for the individual, and a skill assessment. *[Est. Time: 5 mins]*	Staff User Guide Chapter 4
6 ☐	Manage Program Outcome	Because the soft exit procedure does not apply to Generic Programs, staff must complete a hard exit to stop program service delivery.	1. Click Create Outcome. 2. Review each tab screen as a review of the former WIOA activity lesson. *[Est. Time: 10 mins]*	Staff User Guide Chapter 9

Item	Activity	Overview	Details	User Guide
		[Location: Manage Individuals ► Assist an Individual ► Staff Profiles ► Case Management Profile ► Programs tab]		
7 ☐	Manage Individual Case Assignment	Case Assignment is an essential feature in the workforce development industry. It promotes an organized approach to customer service and helps identify a case manager's workload. If staff (case managers) want to receive automated alerts, they must have a caseload of customers for which the alerts will generate. Use PPT to demonstrate the system's functional design for the following components only: ✓ Manage Groups ✓ Staff Group Assignment ✓ Individual Assignment *[Location = left navigation menu ► click Manage Case Assignment ► Individual Case Assignment]*	Explain the following: 1. Case Assignment can be performed by authorized staff in many strategic areas of the system. For example, we've seen links to assign the client to staff in virtually every program form – applications, enrollment forms, case closure forms, etc. 2. Using the left navigation menu, however, offers the entire suite of user options. 3. Click *Manage Case Assignment* ► *Individual Case Assignment* to show the various options available. 4. For the purpose of statewide training, we've set up a few case assignment groups and assigned your staff training accounts to them. This will enable training participants to click Assign Me, if desirable, when working in these various program forms to assign the customer to their caseload. 5. Conduct the PPT demonstration. *[Est. Time: 25 mins]*	Staff User Guide Chapter 18 QRC
8 ☐	Manage Communications	Provide overview of all staff options displayed within the *Communications* portal on the left navigation menu. Address additional staff resources within the *Services for Workforce Staff* portal on the left navigation menu. *[Location = left navigation menu]*	1. Explain that *ICC* provides robust communications tools for authorized staff, most of which are found in the Communications group of staff's left navigation menu, such as: ✓ *Messages* – allows staff to manage their Inbox and Outbox for message (and email) correspondence with individuals, employers, and staff. The system creates return receipts (date/time stamp) for each message and appt viewed by recipients. ✓ *Correspondence* – provides access to form letters, notifications, and other system templates. ✓ *Alerts* – Maintains three alert types: o *My Alerts* – warns staff when their cases hit defined thresholds (i.e., X days since last WP service)	Staff User Guide Chapter 25 QRC

Item	Activity	Overview	Details	User Guide
			o *Text Watch* – provides system security option to monitor words or phrases used in system messages and job orders. o *View System Alerts* – warns individuals, employers and service providers when their accounts statuses hit defined thresholds (i.e., welcome message) *The System Administrator controls system alerts.* ✓ *Virtual Recruiter* – maintains job alerts and resume alerts the staff user created. ✓ *Email Log* – maintains emails the staff user sent and received. *[Est. Time: 20 mins]*	
9 ☐	Manage Schedules	Review two resource tools from the left navigation menu that enhance staff communications: *Appointment Calendar and Events Calendar* *[Location = left navigation menu in the Manage Schedules Group]*	1. Explain that the Schedules component offers staff access to both the appointment and events calendars. 2. If currently managing an individual, the system displays their calendars for staff planning purposes. 3. Users may download appt & events calendars to MS Outlook. Set up each of the following: ✓ *Appointments* – Manage formal commitments for individuals, employers and staff, such as WIOA quarterly follow-ups, job interviews, on-site visits, etc. May send reminder 1-4 days prior, as well as message notification to attendees. With Attendance Tracking module, attendees may accept/decline for staff review-management purposes. ✓ *Events* – Schedule various affairs (i.e., job fair). With Service and Attendance Tracking modules, the system provides multiple registration options, records services for each attendee, and allows staff to track attendees who accept/decline event invitation. *[Est. Time: 5 mins]*	Staff User Guide Chapter 26 QRC
10 ☐	Create an Appointment	Training participants will practice creating an appointment. *[Location = left navigation menu in the Manage Schedules Group]*	1. Click *Appointment Calendar*. 2. Click *Add Appointment*. Appointment Information 1. Enter the subject of the appointment in the Subject field.	Staff User Guide Chapter 26 QRC

Item	Activity	Overview	Details	User Guide
			2. Enter a description of the appointment, if desired. a. To check the spelling of the description, click the <u>Spell Check</u> link. b. To remove the description, click the <u>Clear Text</u> link. *Location* 1. Select an appointment type from the drop-down list. a. If *In Person – Designated Office* is selected, the workforce region, office location, and meeting room drop-down lists will appear. b. If *In Person – Custom Location* is selected, the *Custom Location* field will open in which staff can enter freeform text to describe the location. 2. Staff can indicate their own plan to attend by selecting the *I am attending* checkbox. *Schedule* 1. If the appointment is an all-day event, select the *All Day Appointment* checkbox. 2. If the appointment is not an all-day event, enter the start date and time and the end date and time. 3. To have the system send a reminder of the appointment, select an option from the Send Reminder drop-down list (the options are 1 – 4 days prior to the appointment). The system will send a reminder to the staff member who created the appointment as well as to attendees. *Attendees* Staff can invite other staff members, individuals or employers to the appointment and will use the same process to invite any of the three types of attendees. 1. Click the <u>Select [attendee]</u> link. 2. From the search screen displayed, enter search criteria and click Search. 3. From the search results screen, select the checkbox(es) for the attendee(s) to be invited and click the *Continue* button.	

Item	Activity	Overview	Details	User Guide
			4. To remove an attendee, highlight the attendee and click the Remove link. *Notification Options* 1. Select the option(s) to be used to notify the invitees of the appointment. 2. Click *Save*. The system will send the notification(s) to the invitee(s) automatically. *[Est. Time: 10 mins]*	
11 ☐	Create an Event	If staff create events with service codes attached to them, the system will automatically record these services to an individual's Wagner Peyser service plan when they successfully complete the event. Training participants will practice setting up an event. *[Location = left navigation menu in the Manage Schedules Group]*	1. Click *Events Calendar*. 2. Click *Create New Event*. *Event Information* 1. Select a category (e.g., *Orientation*) 2. Enter the title of the event. 3. Enter a description of the event. 4. Enter the class size limit, if appropriate. *If staff creates a wait list and the event registration exceeds the class size limit, the system will create an overflow attendee list for staff review*. *Schedule* 1. Select the schedule type. 2. Enter the start time and the end time. 3. Enter the *display from* and *display to* dates. 4. Select the recurrence frequency, if applicable. *Associated Offices* 1. Select the region. 2. Highlight an office in the Assigned Office(s) list and click the down arrow. Continue adding offices, as necessary. *Event Location* 1. Provide details, if necessary. *Moderator*	Staff User Guide Chapter 26 QRC

Item	Activity	Overview	Details	User Guide
			1. Provide moderator contact information, if applicable. *Calendar* 1. Indicate whether the event should be hidden. Only authorized staff may view and manage hidden events. 2. Indicate who may view the event. *Attendance Tracking* 1. Select *Yes* to track services for this event. 2. Select *101 – Orientation*. 3. Click the down arrow. *Registration* 1. Select a Registration Method. 2. Indicate the event registration deadline, if applicable. 3. Indicate whether to create a wait list. *If staff creates a wait list and the event registration exceeds the class size limit, the system will create an overflow attendee list for staff review*. 4. Indicate whether the system should notify the moderator when the event is full. 5. Click **Save**. *[Est. Time: 15 mins]*	
12 ☐	Manage Reports	Training participants will review the system's reporting capabilities. *Summary Reports, Custom Reports, Federal Reports and Ad-Hoc Query Reports are generally reserved for State staff.* The Reports training demonstration will focus exclusively on the *Detail Reports* category. The trainer should select a specific region (Region 12) and date range for which report data exists. *[Location = Reports sub-menu for*	*Trainers should generate reports marked with ***.* 1. Explain the following reporting capabilities: ✓ Geographic Solutions uses a dedicated reports server to ensure that users initiating large reports do not affect operational performance (i.e., reporting has its own environment that is separate from the production environment). ✓ The system displays Help text bubbles that provide report summaries. ✓ Within each report, staff may select a wide variety of filtering criteria to help fine-tune the report data.	Staff User Guide Chapter 23 QRC

Item	Activity	Overview	Details	User Guide
		staff along left navigation menu; select Detailed Reports option.]	✓ When generating summary report data, ICC displays total record counts and a total percentage amount. ✓ At the top of the report results page, ICC displays the applicable filters applied to the report. ✓ Report results can be exported into any of the following formats: Excel, Text, CSV, PDF, and Graph (when applicable). ✓ Staff may email output from specific advanced reports to fellow staff. ✓ Staff may save reports to quickly regenerate them without having to reapply the filter criteria every time. ✓ Staff may click hyperlinks on detailed list reports to access a specific individual's or employer's record (provided the staff user has the appropriate security privileges). ✓ Staff may sort report results by clicking desired column headings (when applicable). 2. Click each Report category to provide a brief explanation of each: a. *My Reports* – Maintains those reports saved by the staff member for reusability (and sharing) purposes. b. *Summary Reports* – Typically used by senior staff and management to analyze workforce efforts. c. *Detailed Reports* – Widely used by most staff to evaluate evidence of their effort. The Detailed Reports category consists of many sub-categories. d. *Custom Reports* – Collection of reports submitted by other Geographic Solutions customers deemed helpful. e. *Ad Hoc Query Wizard* – Embodies SQL behavior to create unique reports on the fly. f. *Federal Reports* – Enables State staff to generate federally mandated reports within multiple program categories. *Geographic Solutions will continue to provide webinar training for Summary, Custom, and Ad Hoc reports.* 3. Detailed Reports Category ► Individual Reports	

Item	Activity	Overview	Details	User Guide
			✓ Enrolled Individual*** 4. Detailed Reports Category ▶ Employer Reports ✓ Referrals and Referral Results*** ✓ Internal ▶ List 5. Detailed Reports Category ▶ Services Reports ✓ Services Provided Individuals*** 6. Detailed Reports Category ▶ Case Management Reports ▶ Case Load Sub-Category ✓ Application*** 7. Detailed Reports Category ▶ Case Management Reports ▶ Case Load - WIOA ▶ WIOA Sub-Category ✓ Online Characteristics*** 8. Detailed Reports Category ▶ Case Management Reports ▶ Case Load - WIOA ▶ WIOA Youth Sub-Category ✓ With Barriers*** 9. Detailed Reports Category ▶ Case Management Reports ▶ Predictive Sub-Category *Predictive reports are virtually the same as ETA 9090 WIOA Quarterly reports. However, staff cannot execute these reports in the Training environment.* *[Est. Time: 30 mins]*	
13 ☐	Locating Information: Client Details	The Summary tab of the staff's General Profile is an excellent tool to verify the customer's current status for program service management. *[Location: Manage Individuals ▶ Assist an Individual ▶ Staff's Profiles ▶ General Profile ▶ Summary tab]*	1. Explain that the Summary tab presents multiple panels, each of which presents a unique blend of client account information. 2. Select each panel for demonstration purposes while explaining what each one displays. 3. Explain that hyperlinks within each panel screen provide access to the selected item. ✓ *Case Summary* – blend of system registration info, labor exchange info, case management info, and background info (employment/education histories). ✓ *Chronological Case History* – individual information plus various, filterable history items (case notes, resumes, WIOA info, etc.). o Demonstrate how to filter display options	Staff User Guide Chapter 3 QRC

Item	Activity	Overview	Details	User Guide
			within the panel. o Identify the color-coded status symbols for each item. ✓ *Individual Information* – mainly system reg info ✓ *Verification Summary* (All Applications) – list of docs staff used to verify info to meet federal program requirements. o Click the WIOA program link to view verification docs. ✓ *Staff Assisted Summary* – Tracks the duration of time the case manager spent assisting the individual. *[Est. Time: 5 mins]*	
14 ☐	Locating Information: Staff Training Resources	Review two resource tools that provide informal training assistance to staff users: *Staff Online Resources and the Learning Center.* *[Location = left navigation menu]*	1. Explain that *Staff Online Resources* maintains user documentation in .PDF format, as well as copies of the training materials. The web page is customizable using Content Publisher option in Admin system. 2. Explain that the *Staff Online Courseware* option provides staff access to the Learning Center, a collection of core training videos. *[Est. Time: 10 mins]*	Staff User Guide Chapter 27 
15 ☐	Final Comments and Participant Feedback	Final discussion, evaluation, and wrap up.	1. Check whether participants have questions, or would like to review specific topic(s). 2. Distribute Web link for training evaluation form: https://www.surveymonkey.com/r/QRHVQDS 3. Have participants complete the survey. *[Est. Time: 15 mins]*	
16 ☐	Class Dismissal			