

WIOA Adult Desk Aid

After receiving the customer's eligibility documentation required for program enrollment, the case manager should proceed to enroll the customer in Toolbox 2. All job seeker information must be completed before proceeding to the eligibility screen. Working with the customer, complete the appropriate Assessment Screens to assist the customer in identifying employment related strengths and weaknesses. Each customer's circumstances will vary based on their education and experience, therefore not all of the assessment tools will be necessary for every customer.

1. Locate and open the **Job Seeker** record.

The Assessment

2. Click on the **Assessment** speed button .

NOTE: While an assessment must be completed, you do not have to utilize Toolbox as the assessment tool. There are however advantages to utilizing Toolbox. It provides a countable 9002 Seeker Service that is reportable to USDOL. Using the Assessment in Toolbox also allows other counselors working with the customer to have access to the assessment

Toolbox 2 (Test) Powered by Oracle 11g - Seeker

File Edit Navigation Options Utility MO Utility Window Help

Seeker Screen - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017

Find Seeker Seeker Info Des Job Title Edu/Cert Work History Referrals Core Enroll Other Scratch Pad Svc Referral Adv. Query

Name and Address Information

IA M EXAMPLE III

Mailing Address: 123 MAIN

Street Address:

JEFFERSON CITY MC 65101

Phone Numbers

Home: Cell: Work: Other:

Personal Information

Date of Birth: 12/01/1995 Age: 18

Gender: M

Searchable Deceased Share resume

Veteran Information

Vet Status: N - None Transition:

Recently Separated Served From Served To

Served in Campaign

Print on Summary (Resume)

Service Ended by Disability

Spouse of Deployed Guard/Reserve or spouse deployment ended within the past year

Have you attended a TAP workshop in the past 36 months? No

Source: Counselor Web Partial Seeker Restricted SSN Discrepancy

Seeker Status

Emp Exchange:	Status	Date	Last Update	Workkeys ID:
Active	Active	09/25/14	09/25/14	

Case Management: Inactive Next Appt: Time:

UI Ben Year Beg Dt: Inactive Next Task:

Dislocated Date: EB

Actual Enrollments Possible Enrollments

Job Contacts:

App ID: 3123638529

DCN:

Traine ID#:

Services Provided

Date	Type of Service	Employment Counselor
07/11/14	JobsMoGov Self Job search	Counselor Web
07/11/14	Job Referral	Counselor Web
07/03/14	Job Referral	Counselor Web
07/02/14	JobsMoGov Self Job search	Counselor Web

Web Info Save Cancel

NOTE: Once you click on the **Assessment** button, a pop-up box may appear asking you to assign a **Primary Employment Counselor**.

3. If you are going to be the Primary Counselor working with this individual, click **“YES”** on the popup. **This example already has a primary counselor so the popup is bypassed.**
4. Some of the information on the **Assessment** comes from the customer’s record. **(Employment History)**
5. Read through the **Assessment** questions on the **Employment** tab and answer appropriately. This is where a “picture” of the customer begins being built.

The screenshot shows the 'Assessment - I AM A EXAMPLE III(###-##-3144)' window. At the top, the title bar reads 'Toolbox 2 (Test) Powered by Oracle 11g - Assessment'. The menu bar includes 'File', 'Edit', 'Navigation', 'Options', 'Utility', and 'MO Utility'. The toolbar contains various icons for navigation and editing. The main window has several tabs: 'Employment', 'Education', 'Support System', 'Financial Needs', and 'Basic Skills Tests'. The 'Employment' tab is active, showing 'Assessment Date: 09/25/14' and 'Last Update Date:'. Below this is the 'Employment History' section, which contains a table with columns for 'Employer', 'City', and 'St'. A red box labeled '4' highlights the table, which has one entry: 'McDonalds', 'Jefferson City', 'MO'. To the right of the table are '+ Add' and '- Delete' buttons. Below the table, there are fields for 'Job Title: Counter Worker', 'Start Date: 01/01/13', 'End Date:', 'Months:', 'Per:', 'Salary:', and 'Hrs. Wk:'. A 'Job Description' field contains the text: 'Serve customers in eating places that specialize in fast service and inexpensive carry-out food.' Below this is the 'Current Employment' section with fields for 'Currently Working:', 'Looking for work:', 'Type of work:', 'Longest Worked Employer:', 'Why Left:', 'Applied and Not Hired:', 'Can't Look/Accept Job:', and 'Quit or Fired Reason:'. To the right of the 'Employment History' section are 'Job Seeking Skills' and 'Job Keeping Skills' sections, each with several questions and input fields. At the bottom of the window, there are buttons for 'Print MVA Assessment', 'Save', and 'Cancel'. A red box labeled '5' highlights the top toolbar area, and a red arrow labeled '3' points to the 'Assessment' button in the toolbar.

6. Once all pertinent questions have been answered, click the **Education** tab.

Toolbox 2 (Test) Power Oracle 11g - Assessment

File Edit Navigation **6** s Utility MO Utility Window Help

Assessment - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017

Employment Education Support System Financial Needs Basic Skills Tests

Assessment Date: 09/29/14 Last Update Date:

Employment History

Employer	City	St
McDonalds	Jefferson City	MO

+ Add
- Delete

Job Title: Counter Worker
Start Date: 01/01/13 End Date: Months: Per: Salary: Hrs. Wk.:
Job Description: Serve customers in eating places that specialize in fast service and inexpensive carry-out food.

Current Employment

Currently Working: Parttime When are you able to work:
Looking for work: Yes
Type of work: Production, construction, food service
Longest Worked Employer: 1.5 Why Left: still employed
Applied and Not Hired: Yes applied to several jobs
Can't Look/Accept Job: No
Quit or Fired Reason:

Job Seeking Skills

Do you have a resume? No wants to create a resume
Which methods worked best for you? in person contacts
Describe your typical interview nervous
Do you need help preparing for interviews? yes

Job Keeping Skills

Were you able to get to work on time? Yes
Did you work most scheduled work hours? Yes
Describe your working relationship with your co-workers/supervisor good
What type of jobs have you liked in the past and what are you interested in? construction jobs and anything else outside
Describe what you liked most about your last job the work
Describe what you liked least about your last job my supervisor

LMI vs. Potential Earnings: LMI

Save Cancel

Free Format (FF)
Record: 1/1 <OSC>

7. The **School** information comes over from the customer's record.
8. Read through the **Assessment** questions on the **Education** tab and answer appropriately.
9. **Employment Skills** provides a List of Values (LOV). To access the list, double click in the field.
10. Double click on a skill to move it to the right side of the LOV

Toolbox 2 (Test) Powered by Oracle 11g - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment - I AM A EXAMPLE III(###-##-3144) | ED (73)522-3017

Employment Education Support System Financial Needs Basic Skills Tests

Assessment Date: 09/29/14 Last Update Date: []

Education History

Highest grade completed? [] Currently in School: []

Would you like to obtain your high school diploma or GED? []

Do you have a learning disability? []

What did you like about school? []

What did you dislike about school? []

Are there any training programs you started but didn't complete? []

Training Program	Reason for Leaving	Exit Date

Are you interested in more training or skill enhancement? []

Describe: []

School: High School City: Jefferson City State: MO Major: [] Degree: High School Diplo... Completion Date: []

Employment Skills

Aptitude/Ability Tests

Test Type: [] Test Date: []

Skills

- Active Learning
- Active Listening
- Complex Problem Solving
- Coordination
- Critical Thinking
- Equipment Maintenance
- Equipment Selection
- Installation
- Instructing
- Judgment and Decision Making
- Learning Strategies
- Management of Financial Resources
- Management of Material Resources
- Management of Personnel Resources
- Mathematics
- Monitoring
- Maintenance

Save Cancel

Record: 1/1 <OSC>

11. **Financial Aid** button-Links to the FAFSA site for the customer to apply for a PELL Grant and/or student loans.
12. The License/Certificate field is a List of Values field (LOV). Double-click to bring up the LOV
13. Choose the **License/Certificate** the customer possesses
14. Click **Ok** button

Toolbox 2 (Test) Powered by Oracle 11g - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017

Employment Education Support System Financial Needs Basic Skills Tests

Assessment Date: 09/29/14 Last Update Date: Employment Skills

Education History Critical Thinking

Highest grade completed? High School... Aptitude/Ability Tests

Would you like to obtain your high school diploma? Test Type Test Date: Results: + Add - Delete

Do you have a learning disability? No

What did you like about school? Science, Ma

What did you dislike about school? and

Are there any training programs? and bu

Training Program Reason for Leave

Are you interested in more training or skill enhancement? Yes

Describe: would like training to become a Nurse

School: High School State: MO

City: Jefferson City

Major:

Degree: High School Diplo... Completion Date:

License/Certificate Date St

+ Additional + Add - Delete

Save Cancel

Record: 1/1 <OSC>

NOTICE: All fields were not completed in this example. Not all fields apply to every customer.

15. Once all pertinent questions have been answered click the **Support System** tab

The screenshot shows a software application window titled "Toolbox 2 (Test) Powered by Oracle 11g". The window has a menu bar with "File", "Edit", "Navigation", "Options", "Utility", "15", "Window", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is a form titled "Assessment - I AM A EXAMPLE III(###-##-144) | EDWARD GREENSLIT (573)522-3017". The form has several tabs: "Employment", "Education", "Support System", "Financial Needs", and "Basic Skills Tests". The "Support System" tab is selected. The form contains various input fields and sections:

- Assessment Date:** 09/29/14, **Last Update Date:** (empty)
- Education History:**
 - Highest grade completed?: High School...
 - Currently in School: No
 - Would you like to obtain your high school diploma or GED?: (empty)
 - Do you have a learning disability?: No
 - What did you like about school?: Science, Math, & History
 - What did you dislike about school?: English and schedule
 - Are there any training programs you started but didn't complete?: No
- Training Program Table:**

Training Program	Reason for Leaving	Exit Date	
			+ Add
			- Delete
- Are you interested in more training or skill enhancement?:** Yes
- Describe:** would like training to become a Nurse
- School:** High School, **City:** Jefferson City, **State:** MO
- Degree:** High School Diplo..., **Completion Date:** (empty)
- Employment Skills:** Critical Thinking, Mathematics, Science, + Add, - Delete
- Aptitude/Ability Tests:** Test Type, Test Date, Results, + Add, - Delete
- Education Issues:** LEP/ESL, Describe, Pell grant status: Pending, Yr: 2015, Amt: (empty), Describe, Financial Aid
- Licenses and Certificates:**
 - Training Completion Certificates: + Add, - Delete
 - Table:

Type	License/Certificate	Date	St
...	CPR	06/14	MO
...			
 - + Additional, + Add, - Delete

At the bottom of the form are "Save" and "Cancel" buttons. Below the form is a section titled "Certificate or License obtained by customer (LOV)" with a table showing "Record: 2/2" and "List of Valu...".

16. Read through the **Assessment** questions on the **Support System** tab and answer appropriately

Toolbox 2 (Test) Powered by Oracle 11g - Assessment

File Edit Navigation Options Utility MO Utility V

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Assessment - I AM A EXAMPLE III(### ##-3144) GREENSLIT (573)522-3017

Employment Education **Support System** Financial Needs Basic Skills Tests

Assessment Date: 09/29/14 Last Update Date:

Childcare

Seeker Pregnant: Due Date:

Household include children:

Need child care supportive services to participate in employment/Training activity:

Describe:

Applied for Childcare? Childcare provider?

What is your backup plan if provider is not available?

Additional Support

Any additional supports you need to be successful in employment/participation?

Housing

Homeless in the last year:

Describe:

Current Situation:

Expect any changes in 90 days:

Describe:

Transportation

What is your transportation?

What is your backup plan if primary transport is unavailable?

Drivers License

State: Class: Operators Status:

What keeps you from owning?

Endorsements

Air Brakes Hazardous Material School Bus
 Double/Triple Trailer Passenger Tank Vehicle

Additional Support Contacts

Name	Number	Relationship	Type

Print Add Delete

Household Members

First	Mi.	Last	Birthday	Age	Gender	Relation	Dep

Add Delete

Save Cancel

Are there children in the household? "Yes" or "No"

Record: 1/1 <OSC>

17. What keeps you from owning? This relates to transportation. Clicking on the button provides options as to why the customer does not have transportation.
18. Once all pertinent questions have been answered, click the **Financial Needs** tab

Toolbox 2 (Test) Powered by Oracle 11g - Assessment

File Edit Navigation Options Utility MO Utility Wind

Assessment - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017

Employment Education Support System **Financial Needs** Basic Skills Tests

Assessment Date: 09/29/14 Last Update Date:

Childcare
 Seeker Pregnant: Due Date:
 Household include children: Yes
 Need child care supportive services to participate in employment/Training activity: Yes
 Describe: Need help paying for child care
 Applied for Childcare? No Childcare provider? No
 What is your backup plan if provider is not available? Do not have

Transportation
 What is your transportation? car
 What is your backup plan if primary transport is unavailable? bus
 What keeps you from owning?

Additional Support
 Any additional supports you need to be successful in employment/participation? Not at this time

Housing
 Homeless in the last year: No
 Describe:
 Current Situation: Living with Other
 Expect any changes in 90 days: No
 Describe:

Household Members

First	Mi.	Last	Birthday	Age	Gender	Relation	Dep
I am	A	Example IV	06/01/2012	2	Male	Child	Y
Sally	P	Sue	09/01/1995	19	Fe...	Not related	

Never Learned License Suspended
 Health Problem(s) Need License Plate
 May lose License (Court) Need car repairs
 Insurance Other
 Problem Making Payme... Comments
 None

Save Cancel

Is the household member a dependent of the customer? "Yes" or "No"

Record: 2/2 ... List of Valu... <OSC>

19. Enter **Assessment Month & Year**

20. Double-click in **Resource Type** field

21. Choose **Resource Type**

22. Click OK button

Repeat **Step 20-22** for each **Resource Type**.

23. Enter a **Description** for **Resource Type**

24. Enter **Amount** of **Resource Type**

The screenshot shows a software window titled 'Toolbox 2 (T...)' with a menu bar (File, Edit, Nav...) and a toolbar. The main area is divided into several sections:

- Assessment Section:** Includes a date field for 'Assessment Month & Year' (callout 19) and a dropdown for 'Resource Type' (callout 20).
- Resource Types Dialog:** A modal window titled 'Resource Types' with a search field and a list of resource types: Resource, Alimony, Disability Insurance Payments, Dividends, **Earned Income** (callout 21), Food Stamps, In-Kind, and Interest. It has 'Find', 'OK' (callout 22), and 'Cancel' buttons.
- Monthly Household Resources Table:** A table with columns 'Resource Type', 'Description' (callout 23), and 'Amount' (callout 24). Below the table are 'Total Monthly Resources' and '+ Add' / '- Delete' buttons.
- Monthly Household Expenditure Table:** A table with columns 'Expenditure Type', 'Description', and 'Amount'. Below it are 'Total Monthly Expenditures' and '+ Add' / '- Delete' buttons.
- Summary Section:** Includes 'Assessment Month Net Difference (Total Resources minus Expenditures): 0', 'Financial Education' checkbox, and 'Print', 'Save', 'Cancel' buttons.
- Footer:** 'Assessment Date (MM/YYYY)', 'Record: 1/1', and '<OSC>'.

25. Toolbox calculates **Total Monthly Resources**
26. Double-click in **Expenditure Type** field
27. Choose **Expenditure Type**
28. Click OK button

Repeat **Step 26-28** for each **Expenditure Type**.

29. Enter a **Description** for **Resource Type**
30. Enter **Amount** of **Resource Type**

Assessment Date: 09/29/14 Last Update Date:

Assessment Month & Year: 08/2014 Comment:

Resource Type	Description	Amount
Earned Income	MacDonalds	\$974.00
Food Stamps	Food Stamps	\$325.00
Total Monthly Resources:		1,299

Expenditure Type	Description	Amount
Total Monthly Expenditures:		

Expense Types dialog box:

Find %:

- Resource
- Education Expenses
- Food
- Gas
- Health/Accidental Insurance Premium
- Home Insurance
- Medical Expenses (medical, dental, prescriptions)
- Other Expenses

Buttons: Find, OK, Cancel

Buttons: + Add, - Delete, Print, Save, Cancel

Identify the financial resource type from the LOV.

Record: 3/3 ... List of Valu... <OSC>

34. Completing the **Assessment** provides a countable 9002 Seeker service

Eligibility-Eligibility Tab-
Performance begins here! Check, double check, and then recheck.

35. Click on the **Eligibility** icon.

35

34

Seeker Screen - I AM A EXAMPLE III(### ##-3144) | EDWARD GREENSLIT (573)522-3017

Find Seeker | **Seeker Info** | Des Job Title | Edu/Cert | Work History | Referrals | Core Enroll | Other | Scratch Pad | Svc Referral | Adv. Query

Name and Address Information: I AM A EXAMPLE III, 123 MAIN, JEFFERSON CITY, MO 65101

Personal Information: Date of Birth: 12/01/1995, Age: 18, Gender: M, Searchable, Deceased, Share resume

Veteran Information: Vet Status: N - None, Transition: [dropdown], Recently Separated, Served in Campaign, Print on Summary (Resume), Service Ended by Disability, Spouse of Deployed Guard/Reserve or spouse deployment ended within the past year

Seeker Status: Emp Exchange: Active, Date: 09/29/14, Last Update: 09/29/14, Case Management: Active, Next Appt: [dropdown], UI Ben Year Beg Dt: Inactive, Dislocated Date: [dropdown], EB, Actual Enrollments, Possible Enrollments

Services Provided:

Date	Type of Service	Employment Counselor
09/29/14	Assessment	EDWARD GREENSLIT
07/11/14	JobsMoGov Self Job search	Counselor Web
07/11/14	Job Referral	Counselor Web
07/03/14	Job Referral	Counselor Web

Source: Counselor Web, Restricted, Partial Seeker, SSN Discrepancy

Web Info | Save | Cancel

Query Returned no Rows!

Record: 1/1 | ... | <OSC>

Personal Section

36. **Date of Birth**-Defaults from seeker info page
37. **US Citizen**- Click the arrow to choose “Yes” or “No”.
38. **Alien Registration # A**-If US Citizen is No enter Alien Registration #
39. **Disability Status**: Click the arrow to select the applicable choice.
40. **Disability Type**: If disabled, click the arrow to select the applicable choice.
41. **Have Dependent <18**- Click the arrow to choose “Yes” or “No”.
42. **Single Parent**: Click the arrow to choose “Yes” or “No”.
43. **Limited English**: Click the arrow to choose “Yes” or “No”.

Status Section

- 44. **Vet Status:** Click the arrow to select the applicable choice.
- 45. **Employment Status:** Click the arrow to select the applicable choice.
- 46. **UI Claim Status:** Click the arrow to select the applicable choice.
- 47. **Current Education Status:** Click the arrow to select the applicable choice.
- 48. **Highest Grade Comp:** Click the arrow to select the applicable choice.
- 49. **Dislocated Worker:** Click the arrow to choose “Yes” or “No”.
- 50. **Homeless-** Click the arrow to choose “Yes” or “No”.

The screenshot shows a web-based application window titled "Toolbox 2 (Test) Powered by Oracle 11g - Eligibility". The window contains a form for "Eligibility - I AM A EXAMPLE III(### ##-3144) | EDWARD GREENSLIT (573)522-3017". The form is divided into several sections: "Personal", "WIOA", "WIOA DW", and "WIOA Youth".

Numbered callouts (44-50) are placed over the form, with red arrows pointing to specific dropdown menus:

- 44: Points to the "Vet Status" dropdown menu.
- 45: Points to the "Employment Status" dropdown menu.
- 46: Points to the "UI Claim Status" dropdown menu.
- 47: Points to the "Current Education Status" dropdown menu.
- 48: Points to the "Highest Grade Comp" dropdown menu.
- 49: Points to the "Dislocated Worker" dropdown menu.
- 50: Points to the "Homeless" dropdown menu.

The form also includes fields for "Date of Birth", "US Citizen", "Disability Status", "Income", "Receiving TANF", "Receiving GA/RCA/FOOD STAMPS/SSI", "Free/ Reduced Lunch", "Youth High Poverty Area", "Family Size", "Semi-Annual Income", "Annual Income", "Category", "Layoff Date", "Mass Layoff", "Employer", "Grant Number", "SPYC", "Summer Jobs", "Out of School", "Barriers", "Is the Youth A Parent?", "Is the Youth A child living with the custodial parent or other adult caretaker/relative?", and "Show Me Hero".

At the bottom of the window, there is a "Check Verification" checkbox, an "Eligibility Verif Date" field, and buttons for "Add", "Save", and "Cancel".

WIOA Section

51. The WIOA Section must be completed.

NOTE: The income portion of the eligibility is not required if the participant is receiving TANF or GA/RCA/Food Stamps/SSI

Eligibility-Eligibility Tab Income

52. Click on the **Income** button

53. Enter **Last Month**
(Month/Year)

The screenshot shows the 'Eligibility - I AM A EXAMPLE III(###-##-31)' window. The 'Income' button is highlighted with a red box and labeled '51'. The 'Income' section is highlighted with a red box and labeled '52'. The 'WIA Family Income Worksheet' window is highlighted with a red box and labeled '53'. The 'WIA Family Income Worksheet' window contains a table with columns 'Month/Year' and 'Total'. The 'Last Month' row is selected, and the 'Total' column shows '0'. Below the table is a table with columns 'Income type', 'Description', and 'Amount'. The 'WIA Family Income Worksheet' window also has 'Add', 'Delete', 'Save', and 'Close' buttons.

Month/Year	Total
Last Month:	0
5th:	
4th:	
3rd:	
2nd:	
1st:	

Income type	Description	Amount

54. Toolbox will fill in the Month/Year six months back.

55. Double-click in the **Income Type** field

56. Choose the **Income Type** from the List of Values (LOV)

57. Click **OK** button

The screenshot displays the 'WIOA Family Income Worksheet' application. At the top, a table titled 'WIOA Programs' shows a list of months from 'Last Month' (01/2016) back to '1st' (08/2015), with a 'Total' column showing zeros. To the right, there are input fields for 'WIOA Semi-Annual' and 'WIOA Annual', both set to 0. A 'Copy' button is visible next to the table. Below this is a table with columns 'Income type', 'Description', and 'Amount'. A callout box labeled '54' points to the 'Month/Year' column, and another callout labeled '55' points to the 'Income type' column. An inset window titled 'WIA Income Types' is open, showing a list of income categories: 'Alimony', 'Dividends', 'Earned Income', 'Fellowships, assistantships', 'Government employee pensions', and 'Insurance or annuity payments'. The 'Earned Income' option is highlighted, with a callout labeled '56' pointing to it. At the bottom of the inset window, the 'OK' button is highlighted with a callout labeled '57'. The main window also features a 'Delete' button, a 'Monthly Income' input field, and 'Save' and 'Close' buttons at the bottom.

58. Enter a **Description** of the Income

59. Enter **Amount** of income

Repeat steps 55-59 to add additional income types

WIOA Family Income Worksheet

WIOA Programs

	Month/Year	Total
◆ Last Month:	01/2016	0
5th:	12/2015	0
4th:	11/2015	0
3rd:	10/2015	0
2nd:	09/2015	0
1st:	08/2015	0

WIOA Semi-Annual: 0
WIOA Annual: 0

Copy

58

59

Income type	Description	Amount
Earned Income		

+ Add - Delete Monthly Income: []

Save Close

60. Toolbox will total **Monthly Income**

61. If each month the income is the same you can choose the Copy button.

62. If the monthly income varies, you will need to select the month you wish to enter.

WIOA Family Income Worksheet

WIOA Programs

	Month/Year	Total
Last Month:	01/2016	900
5th:	12/2015	0
4th:	11/2015	0
3rd:	10/2015	0
2nd:	09/2015	0
1st:	08/2015	0

WIOA Semi-Annual: 900
WIOA Annual: 1,800

Copy

Income type	Description	Amount
Earned Income	McDonalds	900

Monthly Income: 900

+ Add - Delete Save Close

- 63. Toolbox will total **WIOA Semi-Annual** total
- 64. Toolbox will total **WIOA Annual** total
- 65. Click **Save** button
- 66. Click Close button

The screenshot shows the 'WIOA Family Income Worksheet' application window. It features a table for 'WIOA Programs' with columns for 'Month/Year' and 'Total'. Below this is a table for 'Income type' with columns for 'Description' and 'Amount'. At the bottom, there are buttons for '+ Add', '- Delete', 'Save', and 'Close'. Red boxes with numbers 63 through 66 point to specific elements: 63 points to the 'WIOA Semi-Annual' total field (3,700), 64 points to the 'WIOA Annual' total field (7,400), 65 points to the 'Save' button, and 66 points to the 'Close' button. A 'Copy' button is also visible next to the annual total field.

WIOA Programs		Month/Year	Total
◆ Last Month:	01/2016	900	
5th:	12/2015	600	
4th:	11/2015	600	
3rd:	10/2015	600	
2nd:	09/2015	300	
1st:	08/2015	700	

Income type	Description	Amount
Earned Income		700

- 67. **Receiving TANF-Yes/NO**
- 68. **Receiving GA/RCA/Food Stamps/SSI-Yes/No**
- 69. **Free/Reduced Lunch-Yes/No**
- 70. **Youth High Poverty Area-Yes/No**
- 71. **Enter Family Size**
- 72. **WIOA Semi Annual Income**-Calculated by Toolbox from Income button
- 73. **WIOA Annual Income**-Calculated by Toolbox from Income button

The screenshot shows the 'Eligibility' software interface for 'I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017'. The interface includes tabs for 'Eligibility', 'Waiver', and 'Enrollment'. The 'Eligibility' tab is active, showing various input fields and dropdown menus. Red boxes and arrows highlight the following fields:

- 67:** 'Receiving TANF' dropdown menu.
- 68:** 'Receiving GA/RCA/FOOD STAMPS/SSI' dropdown menu.
- 69:** 'Free/Reduced Lunch' dropdown menu.
- 70:** 'Youth High Poverty Area' dropdown menu.
- 71:** 'Family Size' input field.
- 72:** 'Semi-Annual Income' input field (value: 3,700).
- 73:** 'Annual Income' input field (value: 7,400).

Other visible fields include 'Date of Birth' (12/01/1995), 'US Citizen' (Yes), 'Disability Status', 'HH Have Dep Child', 'Single Parent', 'Limited English', 'Vet Status' (Not a Veteran), 'Employment Status' (Unemployed), 'UI Claim Status' (None), 'Current Education Status' (Not Attendin...), 'Highest Grade Comp' (High School...), 'Dislocated Worker' (No), 'Homeless' (No), 'WIOA', 'WIOA DW', 'Barriers', 'SPYC', 'Summer Jobs', 'SJL', 'Out of School', and 'A Parent?'. A 'Check Verification' button is visible at the bottom right, and the status bar shows 'Record 3 of 3'.

74. Notice the **Low Income** checkbox is checked for **Adult/Youth**. This occurs based off one of the below criteria
1. Yes to TANF question
 2. Yes to GA/RCA/Food Stamps/SSI question
 3. Yes to Free/Reduced Lunch
 4. Yes to Youth High Poverty Area
 5. Income meets the low income guidelines
75. **Registered-Selective Service** Yes/No
76. **Service #-Enter Selective Service Number**
77. **Waiver**-If not registered with Selective Service choose wavier reason
78. **Was the customer unable to achieve self-sufficiency after receiving career services**-Yes/No

The screenshot shows the 'Eligibility' window with the following data and annotations:

- Personal:** Date of Birth: 12/01/1995, US Citizen: Yes, Alien Registration #: A, Disability Status: Not Disabled, Disability Type: (empty), HH Have Dep Child(<18): No, Single Parent: No, Limited English: No.
- WIOA:** Income: (empty), Receiving TANF: No, Receiving GA/RCA/FOOD STAMPS/SSI: No, Free/Reduced Lunch: No, Youth High Poverty Area: No, Family Size: 1, Semi-Annual Income: 3,700, Annual Income: 7,400.
- WIOA DW:** Category: (empty), Layoff Date: (empty), Mass Layoff: (empty), Employer: (empty), Grant Number: (empty).
- Status:** Vet Sta: Veteran (74), Employment Status: Unempl, UI Claim Status: None (76), Current Education Status: Not Attendin..., Highest Grade Comp: High School..., Dislo: No (78), Homeless: No.
- Registered - Selective Service:** (75) - dropdown menu.
- Service #:** (76) - text field.
- Selective Service Waiver:** (77) - dropdown menu.
- Was the customer unable to achieve self-sufficiency after receiving career services?** (78) - dropdown menu.
- Check Verification:** (checked)

WIOA DW

79. **WIOA Dislocated Worker** This customer is not eligible so we will not complete this section.

DWG

80. **DWG-** This customer is not eligible so we will not complete this section.

Show Me Hero Section

81. **Show Me Hero**-Click on Show Me Hero button

The screenshot shows the 'Eligibility' software interface. At the top, the title bar reads 'Toolbox 2 (Test) Powered by Oracle 11g - Eligibility'. The menu bar includes 'File', 'Edit', 'Navigation', 'Options', 'Utility', 'MO Utility', 'Window', and 'Help'. The main window title is 'Eligibility - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017'. Below the title bar are tabs for 'Eligibility', 'Waiver', and 'Enrollment'. The 'Eligibility' tab is active, showing several sections: 'Personal' (Date of Birth: 12/01/1995, US Citizen: Yes, Alien Registration #: A, Disability Status: Not Disabled, Disability Type: , HH Have Dep Child(<18): No, Single Parent: No, Limited English: No), 'WIOA' (Income: \$, Receiving TANF: , Receiving GA/RCA/FOOD STAMPS/SS: No, Free/Reduced Lunch: No, Youth High Poverty Area: No, Family Size: 1, Semi-Annual Income: 3,700, Annual Income: 7,400, Low Income Adult/Youth: checked, Registered - Selective Service: Yes, Service #: 35-1456328-9, Selective Service Waiver:), 'WIOA DW' (Category: , Layoff Date: , Mass Layoff: , DWG: , Employer: , Grant Number:), 'WIOA Youth' (Select: , SPYC: , Summer Jobs: , SJL: , Out of School:), 'Barriers' (Is the Youth A Parent? , with the cust... or other adult caretaker/relative?), and 'Show Me Hero' (checked, Show Me H... button). A red box labeled '79' points to the 'WIOA DW' section. A red box labeled '80' points to the 'Income' field. A red box labeled '81' points to the 'Show Me H...' button. At the bottom, there is a 'Check Verification' button and a status bar showing 'Eligibility Verif Date: ' and 'Record 3 of 3'.

82. **“Are you one of the following”**

1. the spouse of an active duty military personnel or
2. the spouse of an active duty military personnel who separated from the military within the last 12 months or
3. the spouse of a National Guardsman or a Reservist who was deployed for at least four months and has returned from the deployment within the last twelve months?” If the customer can answer “Yes” to any of the three questions, click the drop down arrow and select Yes. If not, the select “No”.

83. **“Are you a member of the National Guard or a Reservist who was deployed at least four months and has returned from the deployment within the last thirty-six months?”**
Click the arrow and select “Yes or No”

84. **“Are you a Veteran who served in the military within the last 365 days?”**
Click the arrow and select “Yes or No”

The screenshot shows a dialog box titled "Show Me Hero Questions" with a blue background. It contains three questions, each followed by a dropdown menu. Red boxes and arrows highlight the dropdown arrows for questions 82, 83, and 84. Question 82 is "Are you one of the following:" with three sub-questions. Question 83 is "Are you a member of the National Guard or a Reservist who was deployed for at least four months and returned from the deployment with the last thirty-six months?". Question 84 is "Are you a Veteran who served in the military within the last 365 days?". At the bottom of the dialog are "Cancel" and "OK" buttons.

85. Click **OK** button

Show Me Hero Questions

Are you one of the following:

1. the spouse of a active duty military personnel or
2. the spouse of a active duty military personnel who separated from the military within the last 12 months or
3. the spouse of a National Guardsman or a reservist who was deployed for at least four months and then returned from the deployment within the last twelve months?

Are you a member of the National Guard or a Reservist who was deployed for at least four months and returned from the deployment within the last twelve months?

Are you a Veteran who served in the military within the last 365 days?

Cancel OK

85

Eligibility-Eligibility Tab Check Verification

86. Click **Check Verification** button

Note: Notice that green halos will appear around the checkboxes connected to the enrollments that are possible for the customer based on the eligibility factors that were just entered.

The screenshot displays the 'Eligibility' tab of a software application. The interface is divided into several sections:

- Personal:** Includes fields for Date of Birth (12/01/1995), US Citizen (Yes), Alien Registration #, Disability Status (Not Disabled), Disability Type, HH Have Dep Child (<18) (No), Single Parent (No), and Limited English (No).
- Status:** Includes fields for Vet Status (Not a Veteran), Employment Status (Unemployed), UI Claim Status (None), Current Education Status (Not Attendin...), Highest Grade Comp (High School...), Dislocated Worker (No), and Homeless (No).
- WIOA:** Includes a checkbox for WIOA, Income fields (Semi-Annual Income: 3,700; Annual Income: 7,400), Receiving TANF (No), Receiving GA/RCA/FOOD STAMPS/SS (No), Free/Reduced Lunch (No), Youth High Poverty Area (No), Family Size (1), and a checked box for Low Income Adult/Youth.
- WIOA DW:** Includes fields for Category, Layoff Date, Mass Layoff, DWG, Employer, and Grant Number.
- WIOA Youth:** Includes a checked box for WIOA Youth, a 'Select' dropdown, and checkboxes for SPYC, Summer Jobs, and SJL.
- Out of School:** Includes a dropdown menu with '86' highlighted by a red box and a red arrow pointing to the 'Check Verification' button.
- Barriers:** Includes a 'Barriers' button and checkboxes for 'Is the Youth A Parent?' and 'A child living with the custodial parent or other adult caretaker/relative?'.
- Check Verification:** A button with a green checkmark icon.

The bottom status bar shows 'Eligibility Verif Date: Record 3 of 3' and buttons for '+ Add', 'Save', and 'Cancel'.

87. Since the customer will **only** be enrolled in **WIOA Adult** Toolbox will display this popup

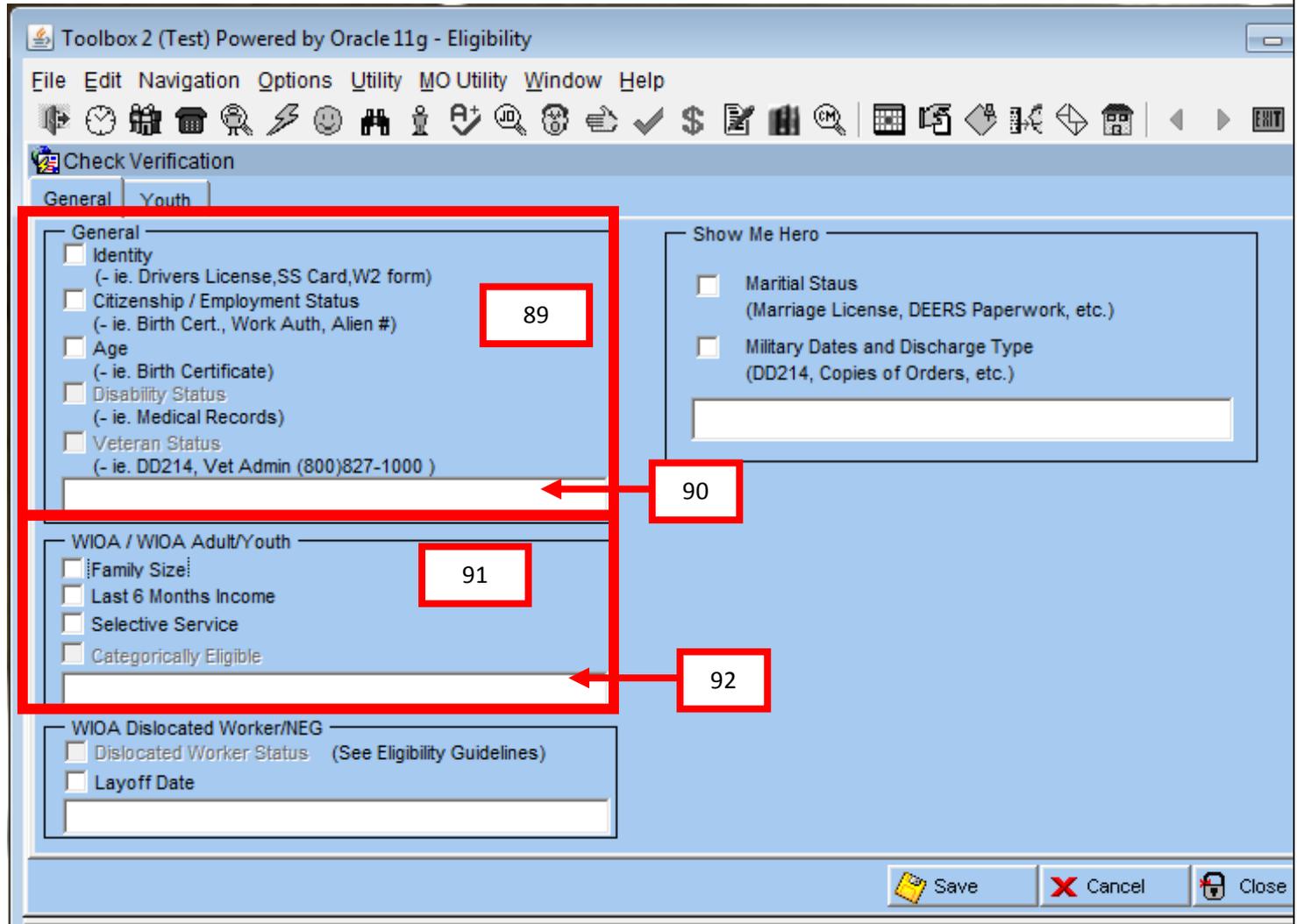
88. Click **Yes** button

General Section

- 89. Each of the active white boxes needs to be checked to attest to staff verification. (Identity, Citizenship/Employment Status, and Age)
- 90. Enter the documentation type used to verify the information in the comment box below the checkboxes.

WIOA/WIOA Adult/Youth Section

- 91. Each of the active white boxes needs to be checked to attest to staff verification. (Identity, Citizenship/Employment Status, and Age)
- 92. Enter the documentation type used to verify the information in the comment box below the checkboxes.



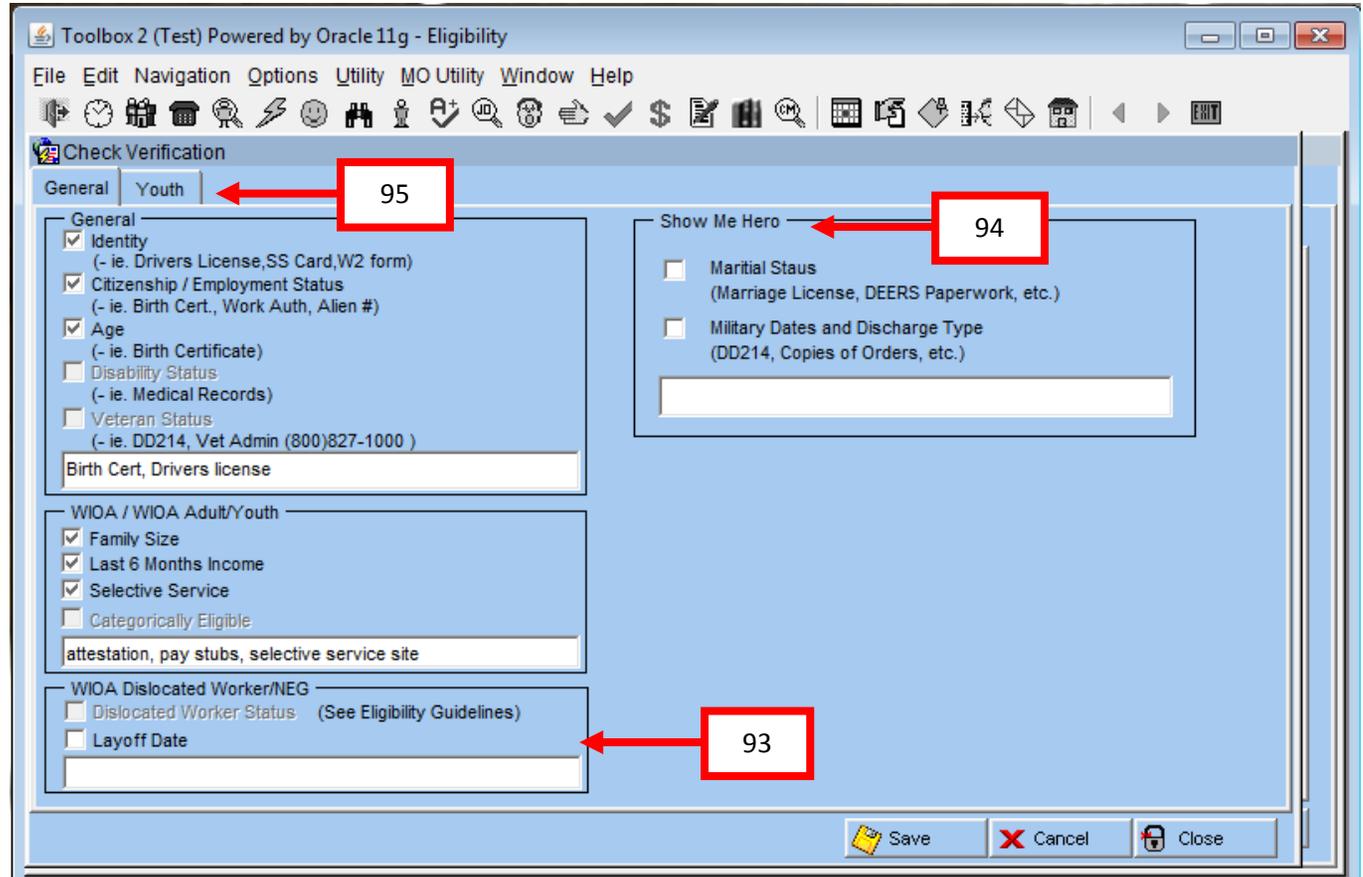
WIOA Dislocated Worker/NEG

93. This does not need to be completed for WIOA Youth

Show Me Hero

94. This does not need to be completed this participant is not Show Me Hero eligible

95. **Youth** tab-Do not need to complete this since we are not enrolling in youth



96. Now that **Check Verification** is complete the **WIOA**, checkbox now contains a checkmark.

NOTE: If you have gotten this far and the enrollment you need is not checked **STOP** go back into the **Check Verification** and find what was missed.

97. Double-click in the **Eligibility Verif Date** field

The screenshot shows the 'Eligibility' software interface. The 'WIOA' checkbox is checked and highlighted with a red box labeled '96'. The 'Eligibility Verif Date' field at the bottom is highlighted with a red box labeled '97'. A red arrow points from the 'WIOA' checkbox to the 'Check Verification' checkbox at the bottom right. The interface includes sections for Personal, Status, Income, and Youth information.

Do not check any of these boxes. They are for Summer Youth Enrollments only

98. After Save a popup will appear indicating the record will be frozen.

99. Click Yes

NOTE: When the Yes button has been clicked, changes can no longer be made to this Eligibility record. If the record needs to be changed, a new Eligibility record will need to be created before the enrollment is created.

The screenshot shows the 'Eligibility' form in the 'Toolbox 2 (Test) Powered by Oracle 11g' application. The form is divided into sections: Personal, WIOA, WIOA DW, Status, and Employment. A 'Forms' dialog box is open in the center, displaying a warning icon and the text: 'This record will be frozen! Do you want to continue?'. Below the text are two buttons: 'Yes' and 'No'. A red box labeled '98' is positioned to the right of the dialog, with an arrow pointing to the 'Yes' button. Another red box labeled '99' is positioned below the dialog, with an arrow pointing to the 'Yes' button in the background form. The background form contains various fields such as 'Date of Birth: 12/01/1995', 'US Citizen: Yes', 'Disability Status: Not Disabled', 'Income', 'Receiving TANF: No', 'Receiving GA/RCA/ FOOD STAMPS/SS: No', 'Free/ Reduced Lunch: No', 'Employer', 'Vet Status: Not a Veteran', 'Employment Status: Unemployed', 'UI Claim Status: None', 'Current Education Status: Not Attendin...', 'Highest Grade Comp: High School...', 'Dislocated Worker: No', 'Homeless: No', 'Service #: 35-1456328-9', 'Selective Service Waiver', 'Was the customer self-sufficiency achieved? Yes', and 'Show Me Hero'.

100. Click on **Enrollment** tab

SPECIAL NOTE

The start date of the enrollment must be no later than the actual start date of the first service being funded. Actual Start date must be entered into service notes.

The screenshot shows a software window titled "Toolbox 2 (Test) Powered by Oracle 11g - Eligibility". The menu bar includes File, Edit, Navigation, Options, Utility, MO Utility, Window, and Help. The main window title is "Eligibility - I AM A EXAMPLE III(### ##-3144) EDWARD GREENSLIT (573)522-3017". There are three tabs: "Eligibility", "Waiver", and "Enrollment". The "Enrollment" tab is highlighted with a red box containing the number "100". The "Eligibility" section is active, showing various fields for personal information, income, and status. The "Personal" section includes Date of Birth (12/01/1995), US Citizen (Yes), Alien Registration # (A), Disability Status (Not Disabled), Disability Type, HH Have Dep Child (<18) (No), Single Parent (No), and Limited English (No). The "Status" section includes Vet Status (Not a Veteran), Employment Status (Unemployed), UI Claim Status (None), Current Education Status (Not Attending), Highest Grade Completed (High School), Dislocated Worker (No), and Homeless (No). The "Income" section includes WIOA (checked), Income, Receiving TANF (No), Receiving GA/RCA/FOOD STAMPS/SS (No), Free/Reduced Lunch (No), Youth High Poverty Area (No), Family Size (1), Semi-Annual Income (3,700), and Annual Income (7,400). The "WIOA DW" section includes Category, Layoff Date, Mass Layoff, DWG, Employer, and Grant Number. The "WIOA Youth" section includes SPYC, Summer Jobs, SJL, Out of School, and a "Barriers" section with checkboxes for "Is the Youth A Parent?" and "A child living with the custodial parent or other adult caretaker/relative?". The "Show Me Hero" section has a "Show Me H..." button. The "Check Verification" button is checked. The "Registration Details" button is also visible. The bottom status bar shows "Eligibility Verif Date: 02/03/16", "Record 3 of 3", and buttons for Add, Save, and Cancel.

NOTE: All programs the customer is eligible for based on information entered into Toolbox is listed on the **Enrollment** tab

- 101. Click in the **box** next to **WIOA Adult** program
- 102. Click **Enroll** button.

Eligibility - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017

Eligibility Waiver Enrollment

Eligible Enrollments

DWD Eligibility	Referral System Programs	Ref Dt	DCN ID	Teen Two
<input checked="" type="checkbox"/> WIOA Adult				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Verify Date: 02/03/16

Other Potential DWD Programs

Enroll

Actual Enrollments

Program	Start Dt	End Dt	Teen Two	Trade 2002	Outcome

External Counselor Recalled by Trade Affected Employer Save Cancel

Actual Enrollments

- 103. The **WIOA Adult** is now displayed in the **Actual Enrollments** section, along with a **Start Date**.
- 104. Click **Save** button.
- 105. Click on the **Employment Plan** speed button.

The screenshot shows a software window titled "Toolbox 2 (Test) Powered by Oracle 11g - Eligibility". The window has a menu bar (File, Edit, Navigation, Options, Utility, MO Utility, Window, Help) and a toolbar with various icons. The main area is divided into two sections: "Eligible Enrollments" and "Actual Enrollments".

Eligible Enrollments: This section contains three tables: "DWD Eligibility", "Referral System Programs", and "Other Potential DWD Programs". The "DWD Eligibility" table has columns for "Program", "Ref Dt", "DCN ID", and "TeenTwo". The "Referral System Programs" table has columns for "Ref Dt", "DCN ID", and "TeenTwo". The "Other Potential DWD Programs" table is currently empty. There are "Add" and "Delete" buttons on the right, and an "Enroll" button at the bottom.

Actual Enrollments: This section contains a table with the following columns: "Program", "Start Dt", "End Dt", "Teen Two", "Trade 2002", and "Outcome". The first row is highlighted in blue and contains the text "WIOA Adult", "02/03/16", and several checkboxes. There are "Oops!" and "Show Clos..." buttons on the right.

At the bottom of the window, there are checkboxes for "External Counselor" and "Recalled by Trade Affected Employer", and "Save" and "Cancel" buttons.

Red boxes and arrows highlight specific elements: "105" points to the "Employment Plan" speed button in the toolbar; "103" points to the "WIOA Adult" entry in the "Actual Enrollments" table; "104" points to the "Save" button at the bottom right.

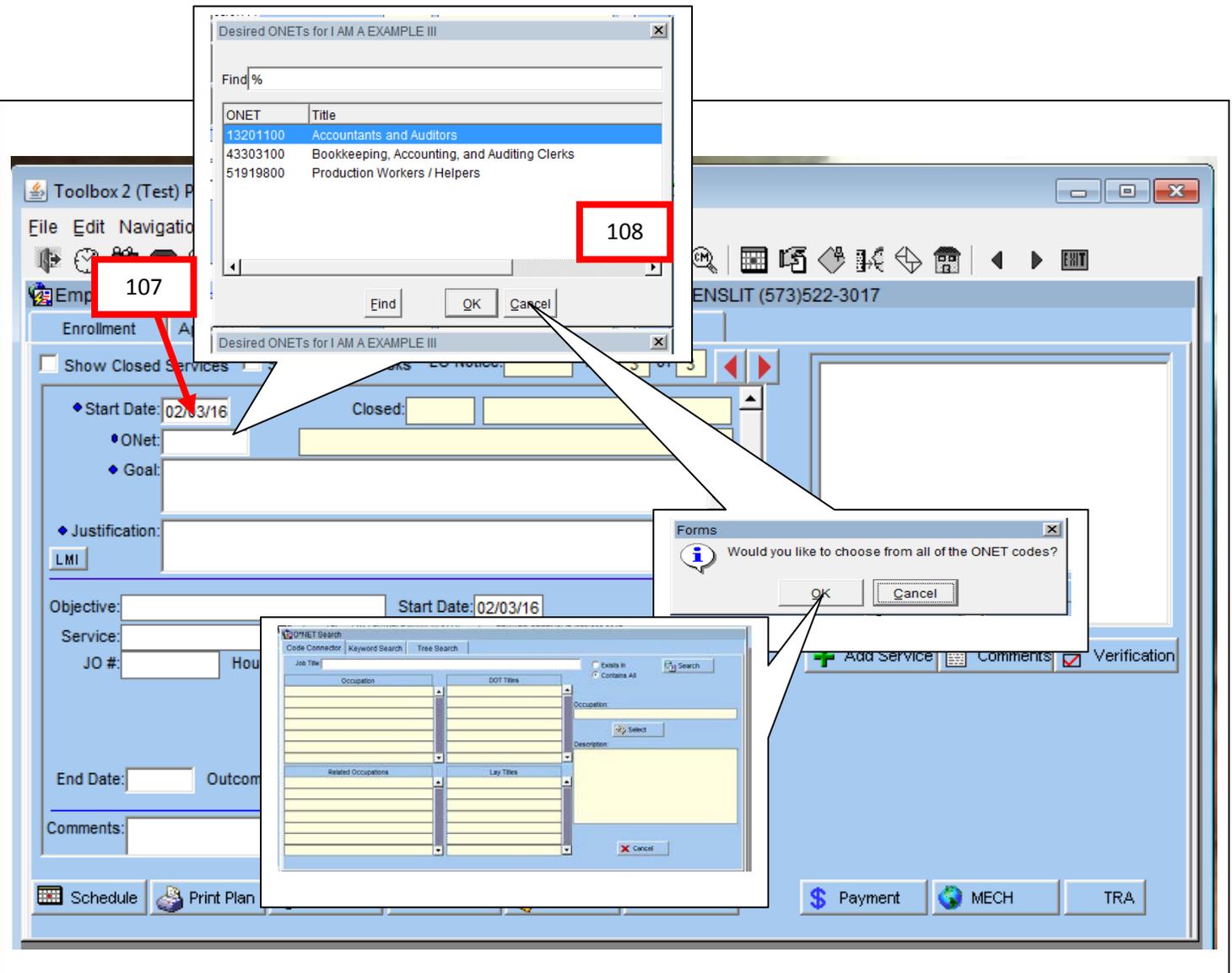
106. Click on **Employment Plan** tab

The screenshot shows a software window titled 'Toolbox 2 (Test) Powered by Oracle' with a sub-title 'Employment Plan'. The window has a menu bar (File, Edit, Navigation, Options, Utility, MD Utility, Window, Help) and a toolbar. The main content area has several tabs: 'Enrollment', 'Appropriateness', 'Employment Plan' (selected), 'Progress', and 'Closures'. The 'Employment Plan' tab is highlighted with a red box and the number '106'. Below the tabs, there are sections for 'Eligible Enrollments' and 'Actual Enrollments'. The 'Eligible Enrollments' section includes a 'DWD Eligibility' table, a 'Referral System Programs' table with columns 'Ref Dt' and 'DCN ID', and an 'Other Potential DWD Programs' section. The 'Actual Enrollments' section includes a table with columns 'Program', 'Start Dt', 'End Dt', 'Trade 2002', and 'Outcome'. The table contains one row with 'WIOA Adult' and '02/03/16'. At the bottom, there are checkboxes for 'External Counselor' and 'Recalled by Trade Affected Employer', and buttons for 'Save' and 'Cancel'.

Program	Start Dt	End Dt	Trade 2002	Outcome
WIOA Adult	02/03/16		<input type="checkbox"/>	
			<input type="checkbox"/>	

107. Select an **ONet** by double clicking in the ONet field.
108. Choose the ONet that you want to select by clicking on it (this will highlight it) If the ONet you need **is not** listed click the **Cancel** button.
109. Click **OK** (if you have selected the correct ONet from the list)

NOTE: For this desk aid we will step through adding a new ONet title.



110. Enter the title of the ONet you need into the **Job Title** field.

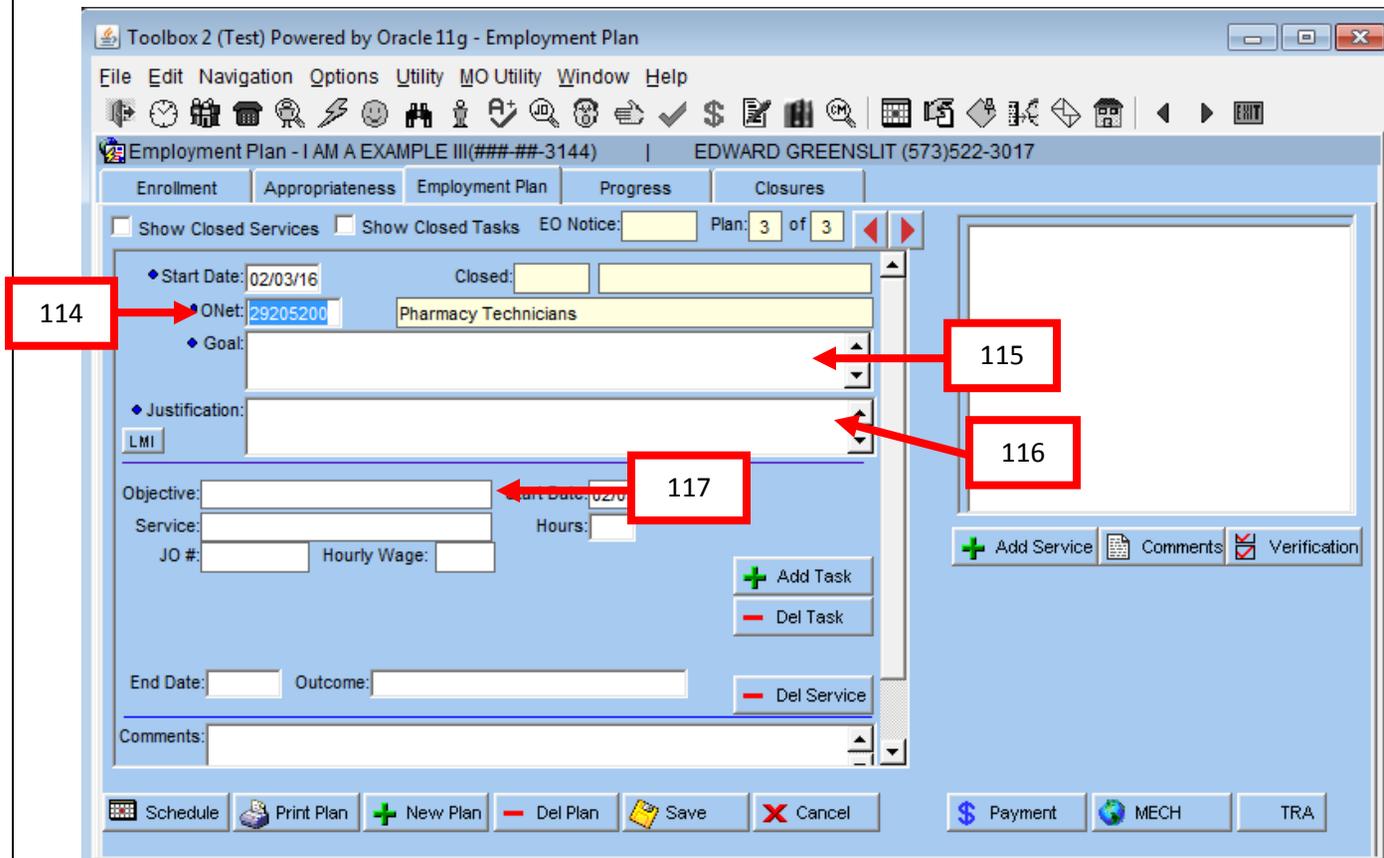
111. Click **Search** button.

112. Locate the ONet you wish to add on the list and click on it.

113. Click **Select** button

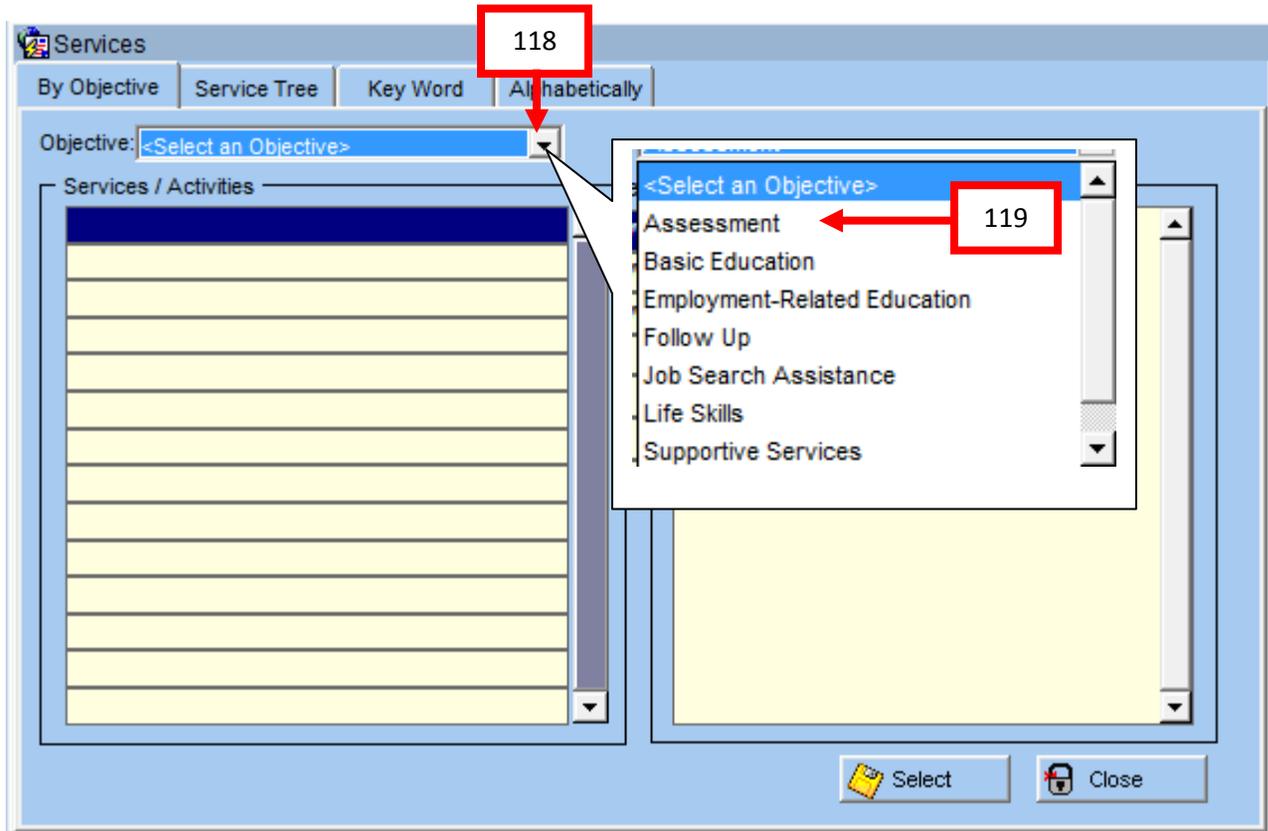
The screenshot shows the O*NET Search application window. At the top, there are three tabs: "Code Connector", "Keyword Search", and "Tree Search". The "Job Title" field contains the text "Pharmacy". To the right of this field are two radio buttons: "Exists In" (selected) and "Contains All". A "Search" button is located to the right of these radio buttons. Below the search area are four main sections: "Occupation", "DOT Titles", "Related Occupations", and "Lay Titles". Each section contains a list of items with scroll bars. In the "Occupation" list, "Pharmacy Technicians (29-2052.00)" is highlighted. In the "DOT Titles" list, "Pharmacy" is highlighted. In the "Lay Titles" list, "PHARMACY TECHNICIAN" is highlighted. To the right of these lists is a "Description" field containing the text: "Prepare medications under the direction of a pharmacist. May measure, mix, count out, label, and record amounts and dosages of medications." Below the description is a "Select" button. At the bottom right of the window is a "Cancel" button. Red boxes with numbers 110, 111, 112, and 113 are placed over the "Job Title" field, the "Search" button, the "Pharmacy Technicians" entry, and the "Select" button, respectively. Red arrows point from these boxes to the corresponding elements in the interface.

- 114. **ONet** is now populated.
- 115. **Goal:** Type in a goal for the job seeker.
- 116. **Justification:** Type in the justification reason to explain the goal entered.
- 117. **Objective:** Double click in the Objective field

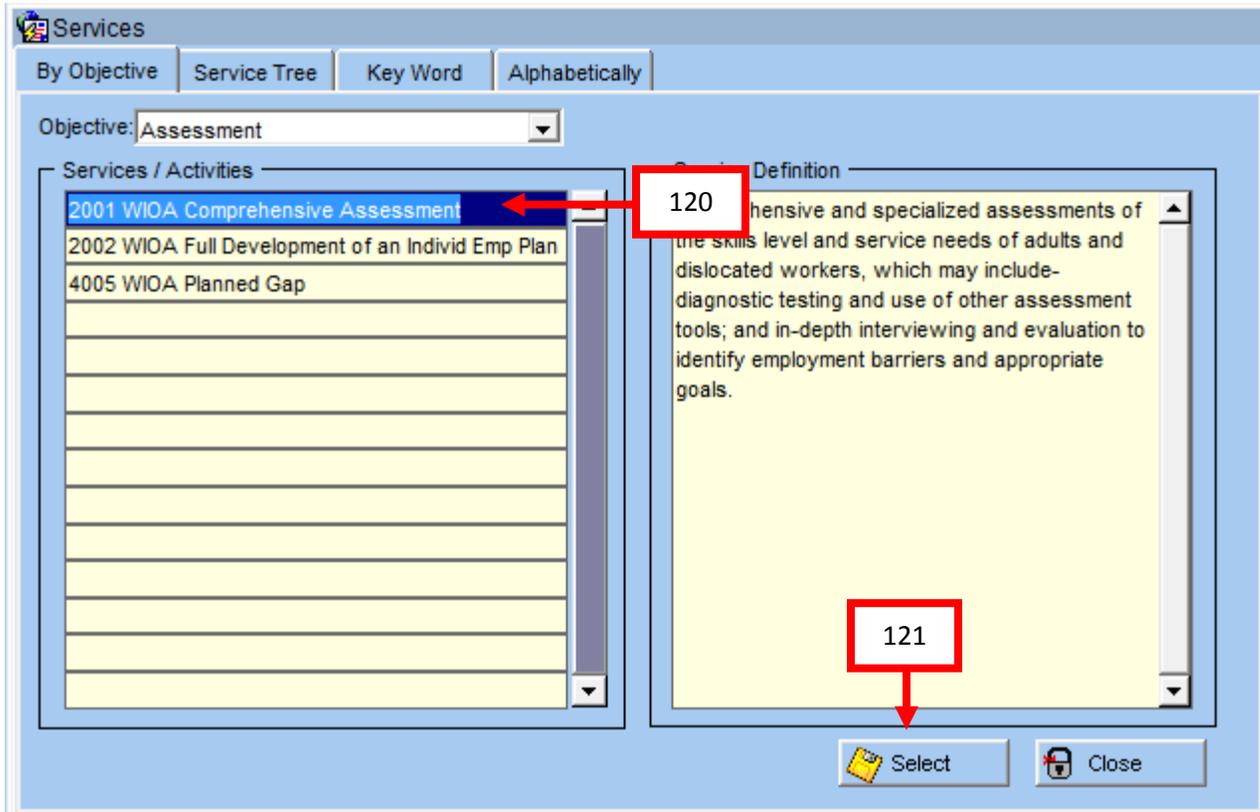


NOTE: Customer must have a 2001 WIOA Comprehensive Assessment & a 2002 WIOA Full Development of an Indiv Emp Plan before they can receive a WIOA 3000 level service. The 2001 Comprehensive Assessment & a 2002 WIOA Full Development of an Indiv Emp Plan will only keep a participant from exiting for 90 days. These services may be opened and closed the same day.

- 118. Click the **Objective** box
- 119. Highlight the **Objective** needed by clicking on it.



- 120. Highlight the **Service/Activity** needed by clicking on it.
- 121. Click **Select**



122. The **Objective** and **Service** now display in the boxes.

123. **Start Date:** Automatically enters the current date.

124. Click **Save** button

NOTE: Staff has the ability to backdate a service 7 days – be careful as the service date should not precede the enrollment start date

Toolbox 2 (Test) Powered by Oracle 11g - Employment Plan

File Edit Navigation Options Utility MO Utility Window Help

Employment Plan - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017

Enrollment Appropriateness Employment Plan Progress Closures

Show Closed Services Show Closed Tasks EO Notice: Plan: 3 of 3

Start Date: 02/03/16 Closed: ONet: 29-2052.00 Pharmacy Technicians

Goal: Short Term Goal-to obtain a position as a pharmacy technician
Long Term Goal-to obtain a position as a pharmacist

Justification: Pharmacy technician position B and is increasing by 20.55%

LMI

Objective: Assessment Start Date: 02/03/16

Service: 2001 WIOA Comprehensive Assessment Hours: + Add Task - Del Task

Task 1: Comp: + Add Task - Del Task

End Date: Outcome: - Del Service

Comments: + Add Service Comments Verification

Schedule Print Plan + New Plan - Del Plan Save Cancel Payment MECH TRA

125. The service is now saved to the Employment Plan and it now displays in the Employment Plan tree.

NOTE: WIOA Intensive level services are only good for 90 days. They **WILL NOT** keep a record from exiting after they are older than 90 days. You can open and close WIOA Intensive level services the same day, this can help to ensure none stay open longer than 90 days.

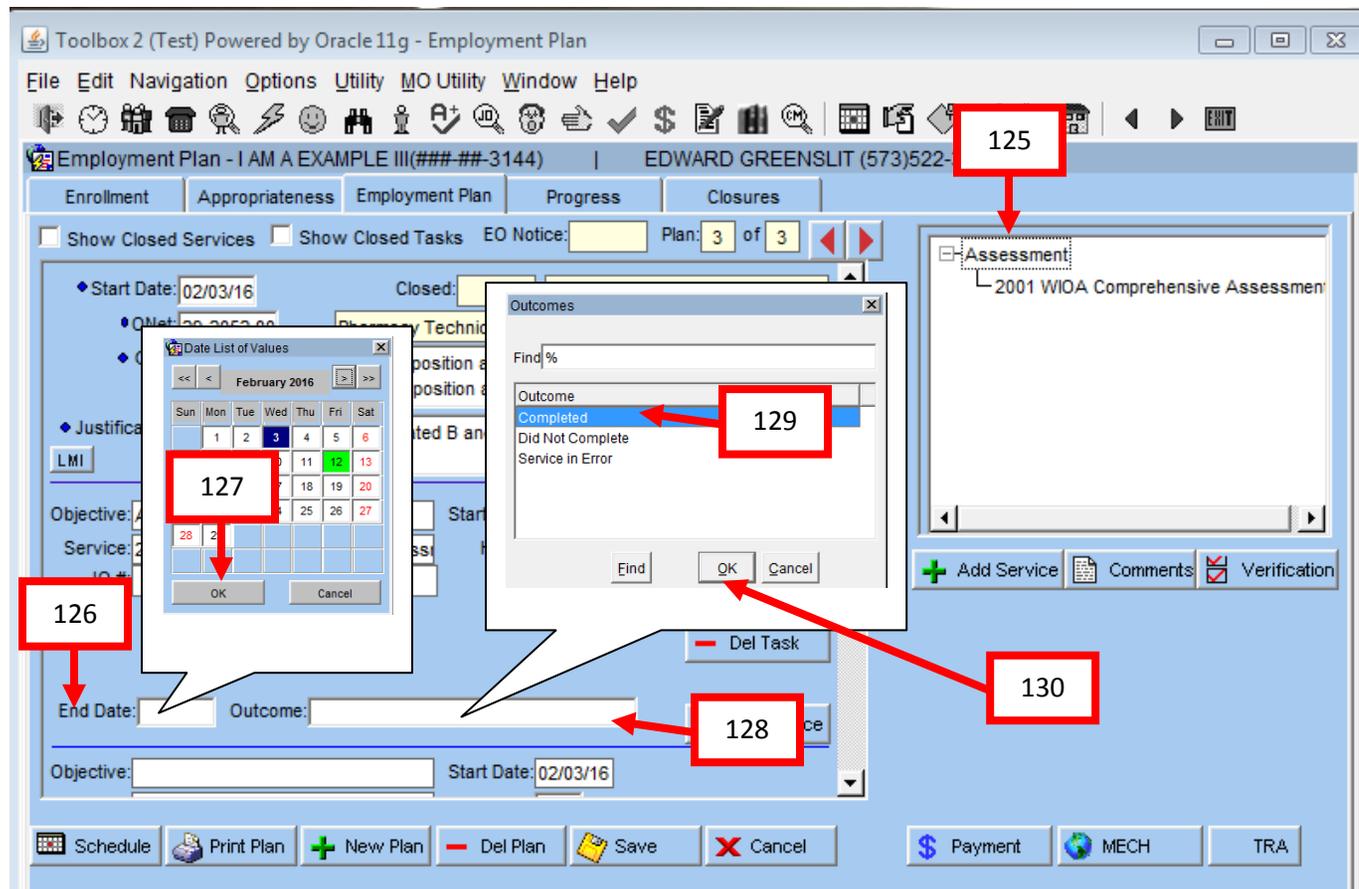
126. Double-Click in the **End Date** field. This will bring up a calendar.

127. Click the **OK** button.

128. Double-click in the **Outcome** field. This will bring up a list of values containing the outcomes available.

129. Choose the outcome you wish to use.

130. Click **OK** button.

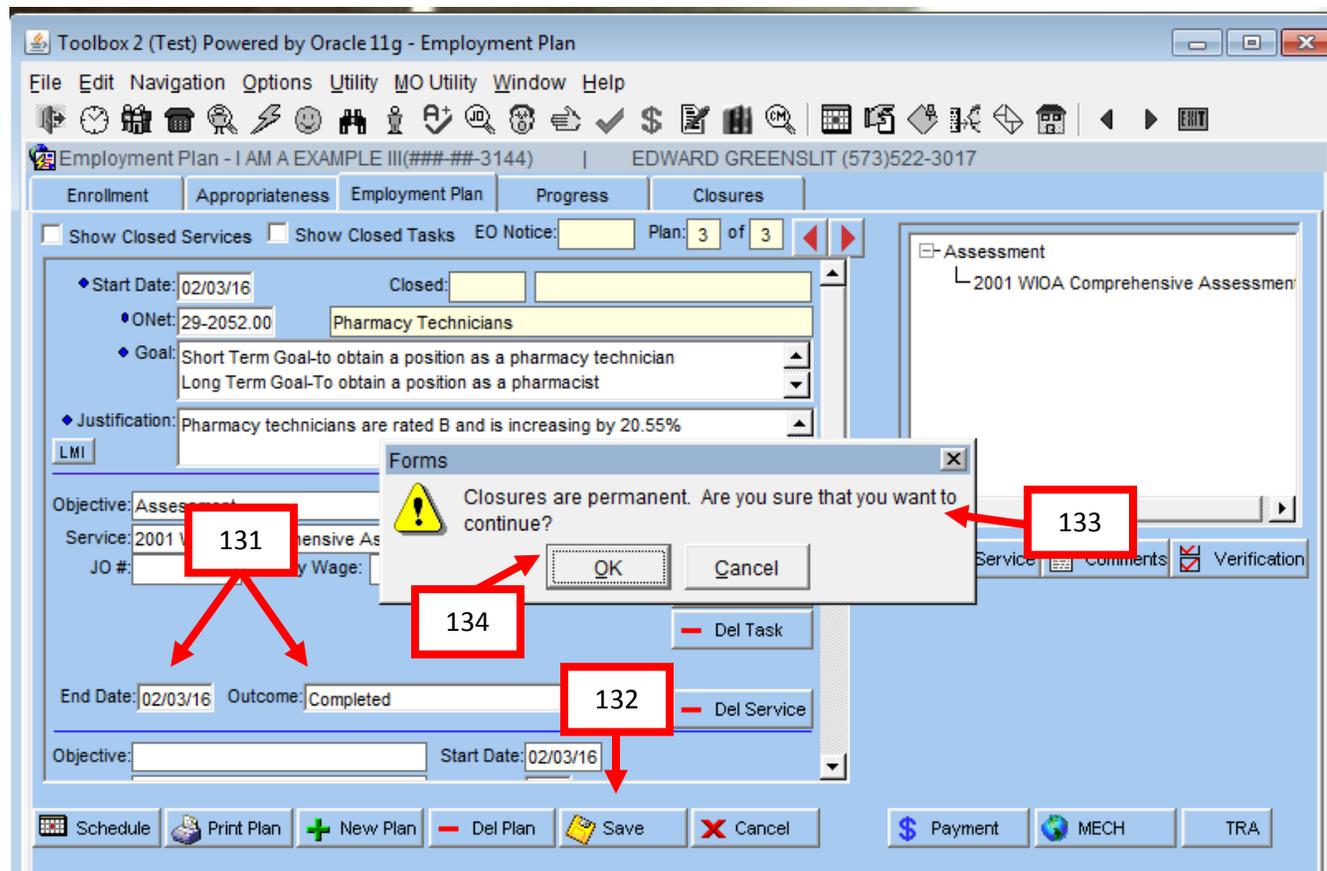


131. The **End Date** and **Outcome** fields are now populated.

132. Click **Save** button.

133. After Save a popup will appear informing you that Closures are permanent.

134. Click **OK** button



135. Service has been closed and no longer is shown in the Employment Plan tree

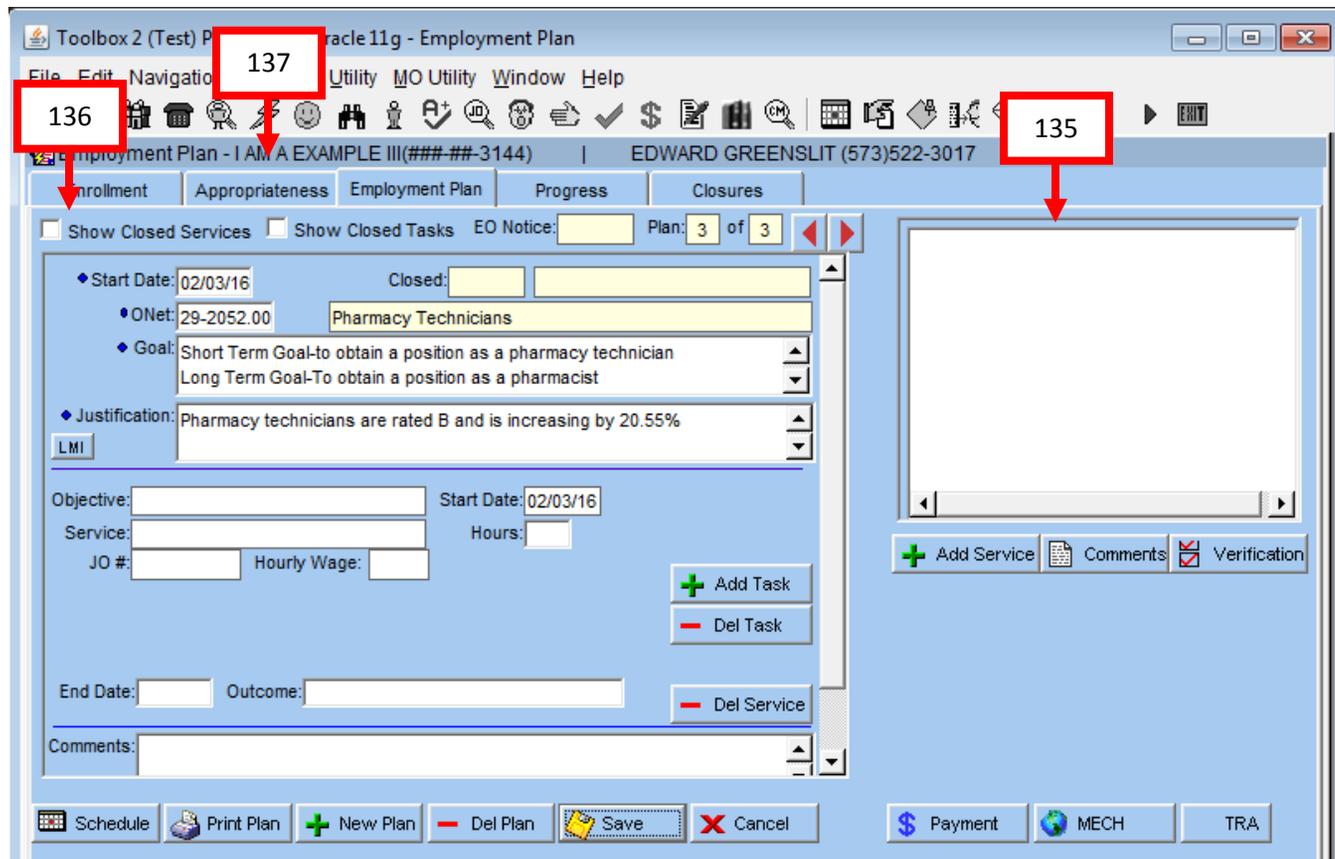
136. If you need to view closed services put a check in the **Show Closed Services** box.

NOTE: The 2002 WIOA Full Development of an Indiv Emp Plan service is opened and closed in the same way the 2001 Comprehensive Assessment was.

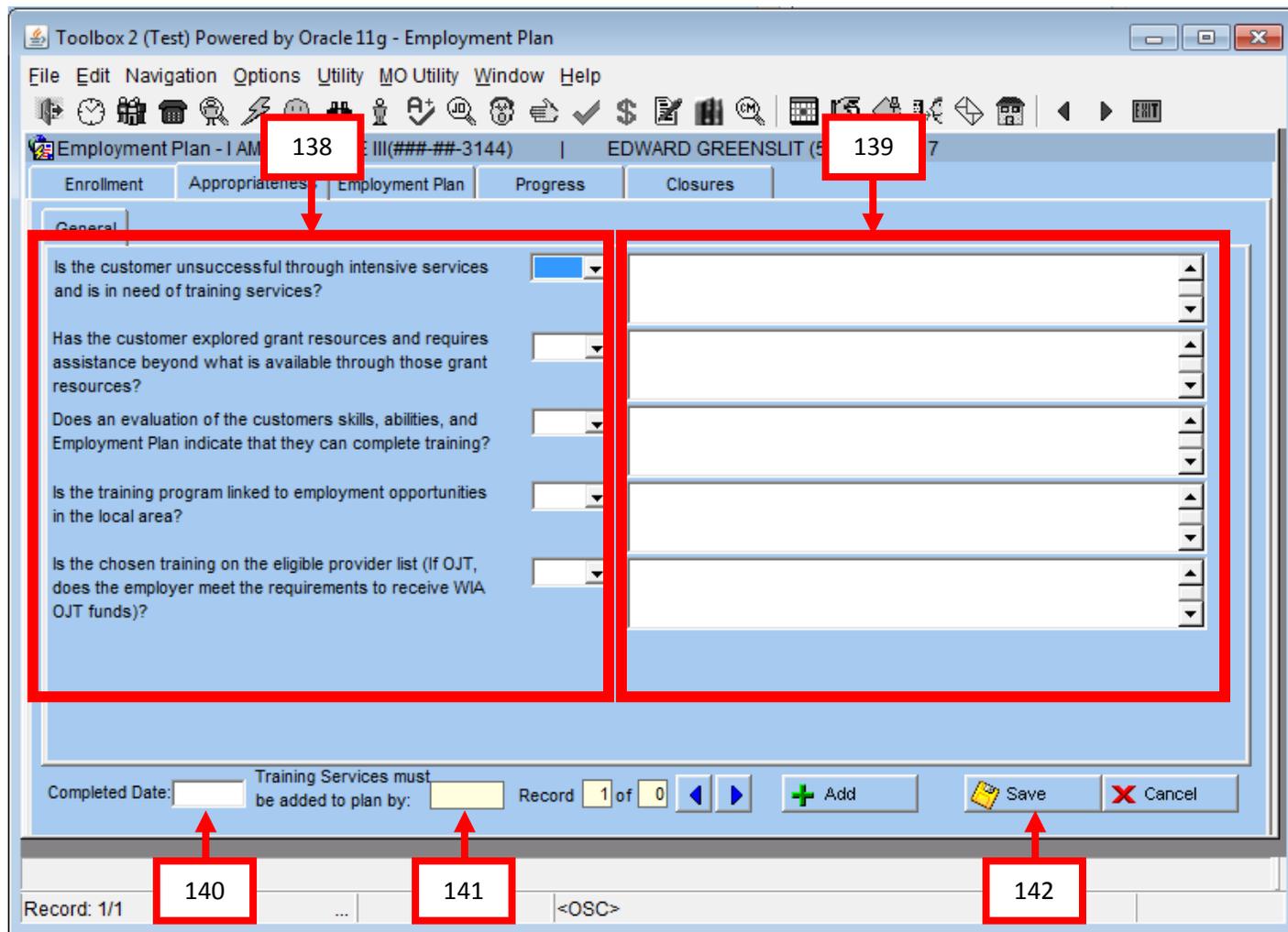
Adding a 3000 Level Service

137. Click on the **Appropriateness** tab

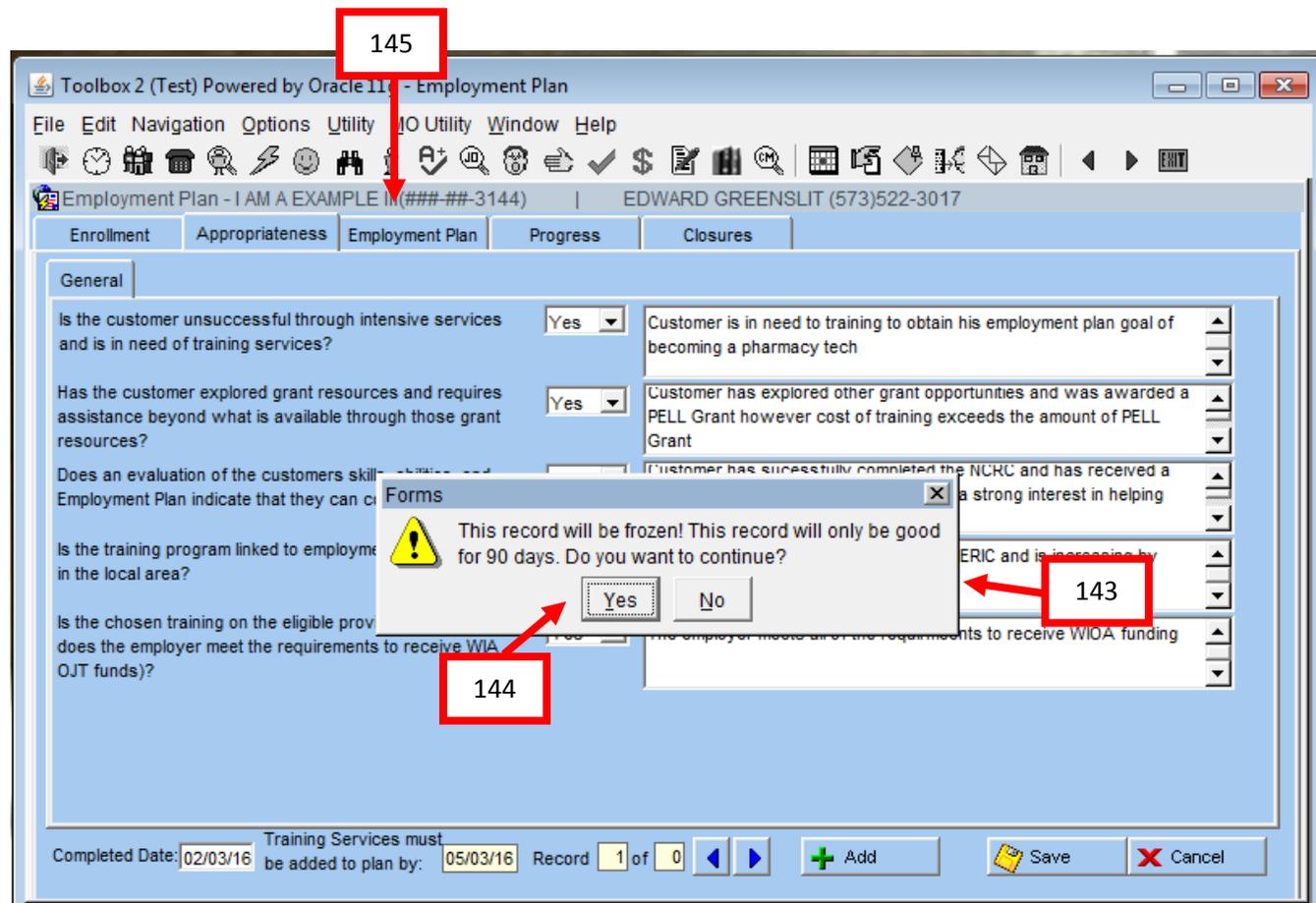
NOTE: Services can also be closed on the closures tab.



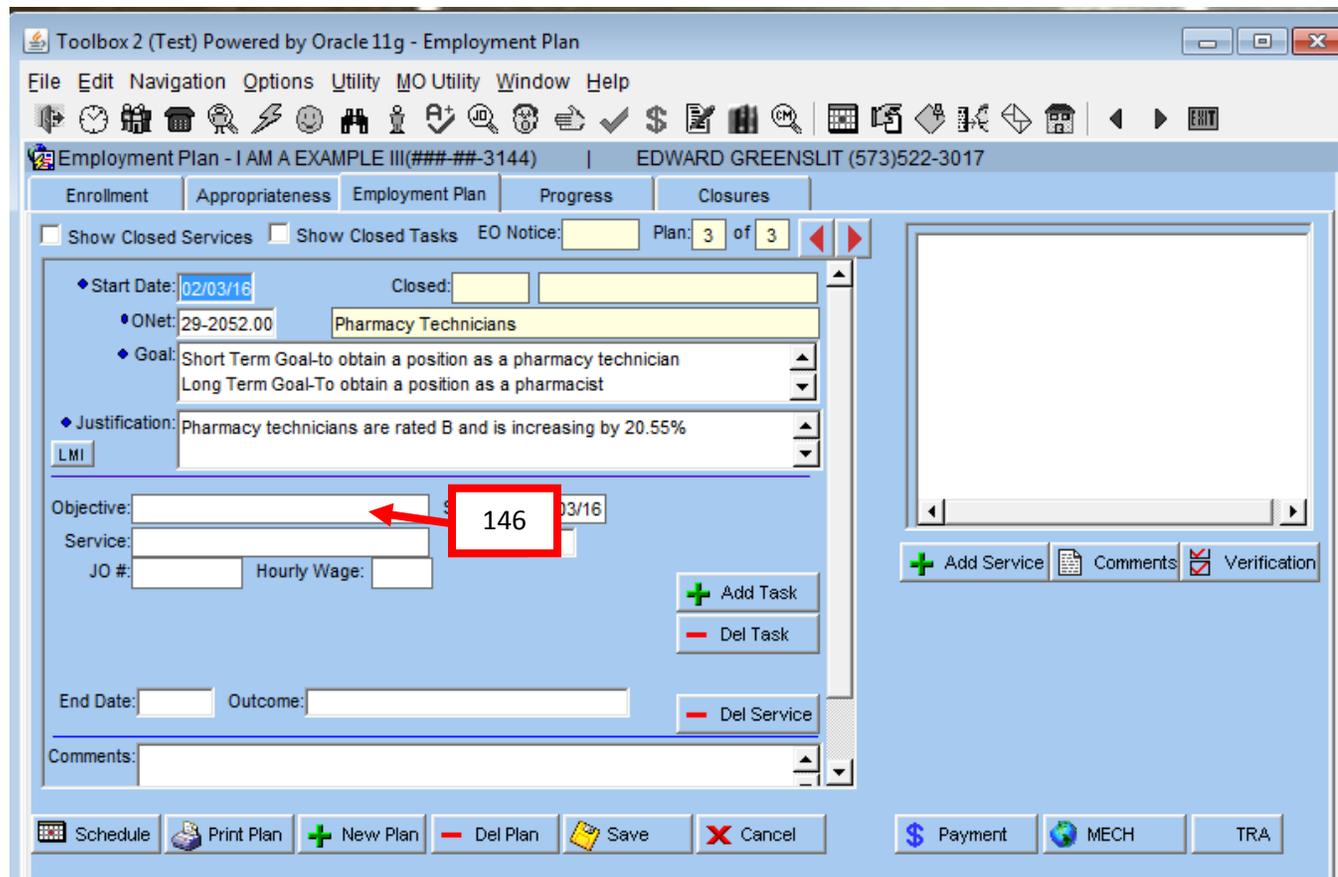
- 138. Click the drop down box for each question and select “Yes” or “No”. (All must be **Yes** to justify spending training dollars)
- 139. Enter a detailed description in the text boxes regarding each question.
- 140. Enter a **Completed Date** by double clicking in the box.
- 141. The “**Training Services must be added to plan by**” automatically defaults to 90 days in the future. (If training services need to be entered after the date this screen must be completed again.)
- 142. Click **Save** button



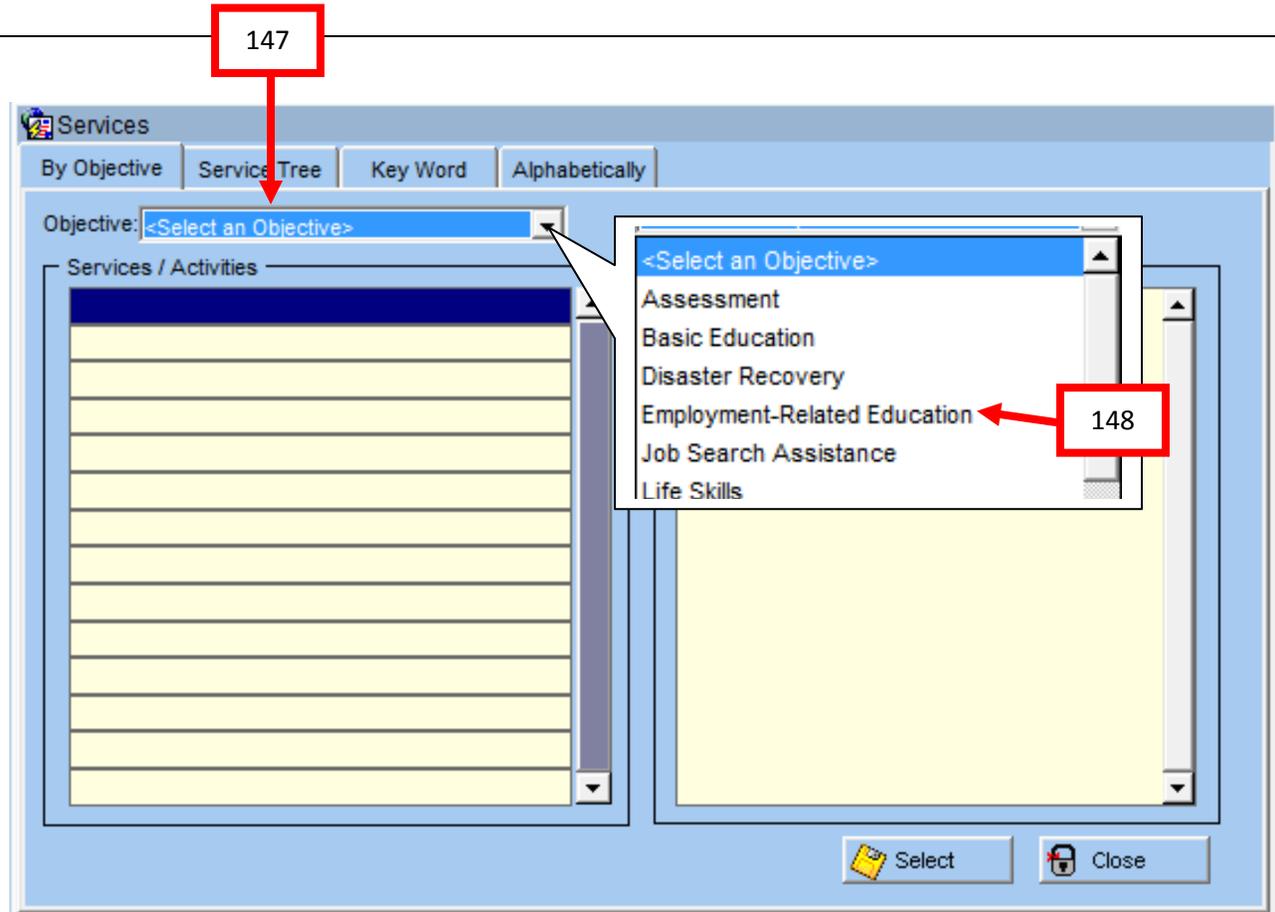
- 143. After Save popup will appear informing you that Closures are permanent.
- 144. Click **Yes** button
- 145. Click **Employment Plan** tab



146. **Objective:** Double-click in the Objective field

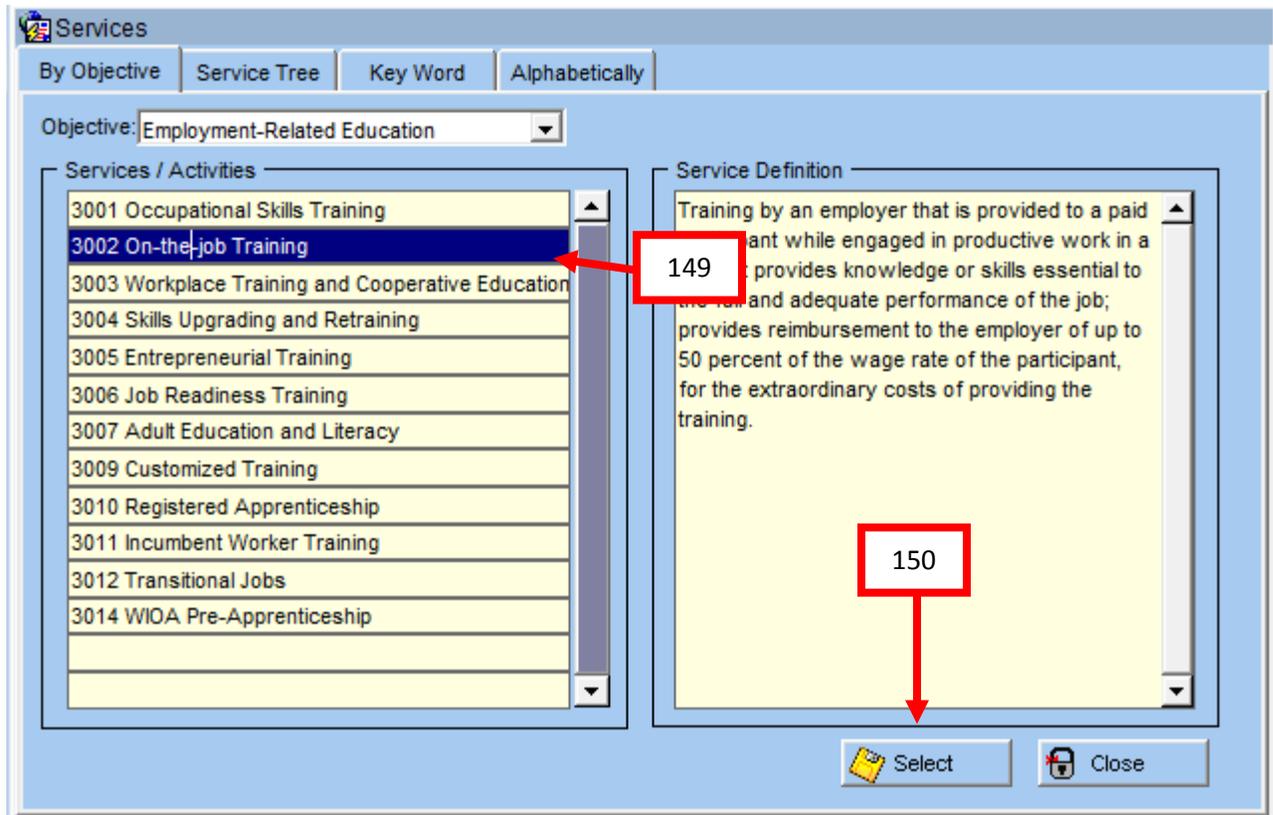


- 147. Click on the Objective box.
- 148. Highlight the **Objective** needed by clicking on it



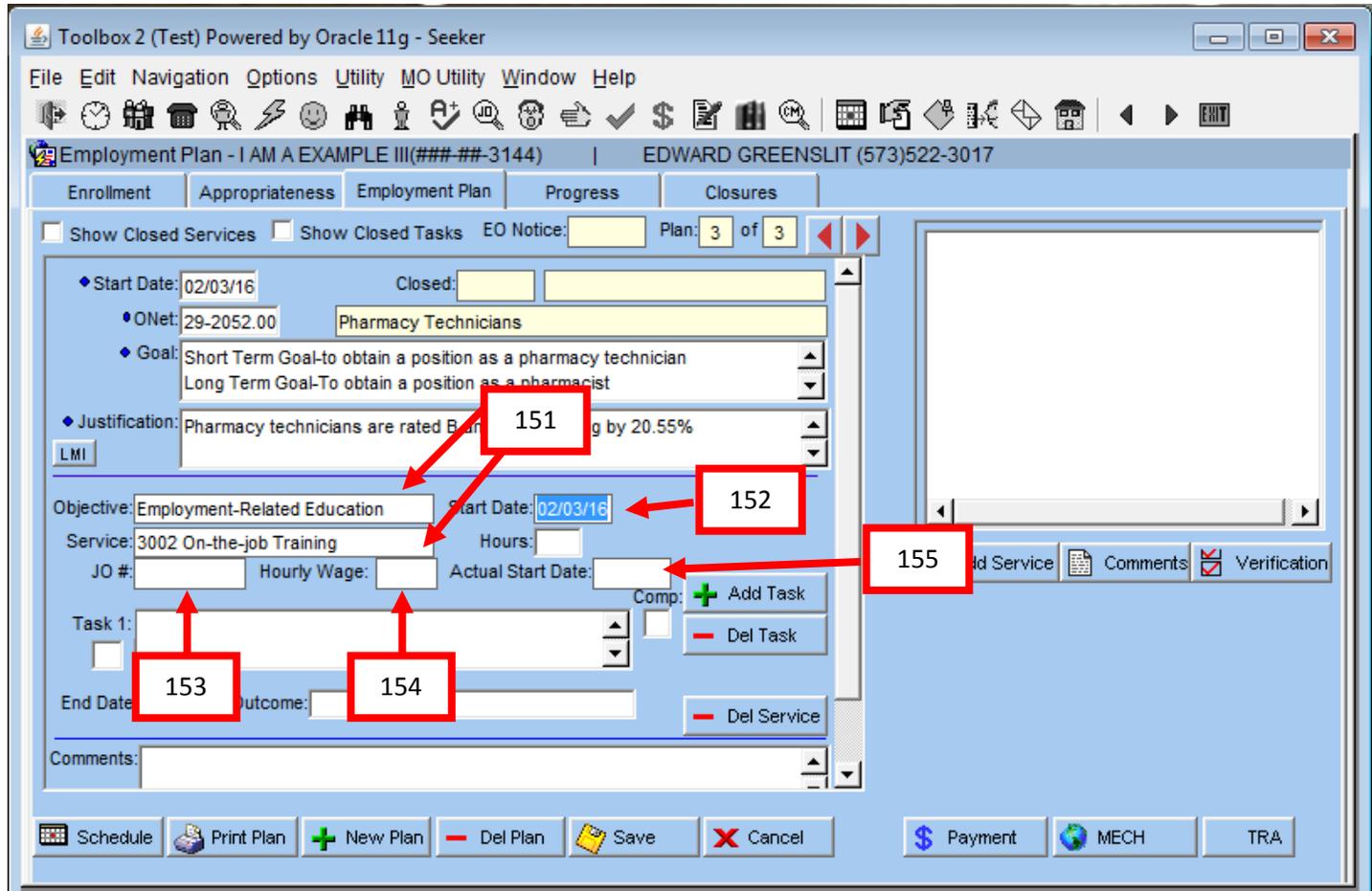
149. Highlight the **Service/Activity** needed by clicking on it.

150. Click **Select** button

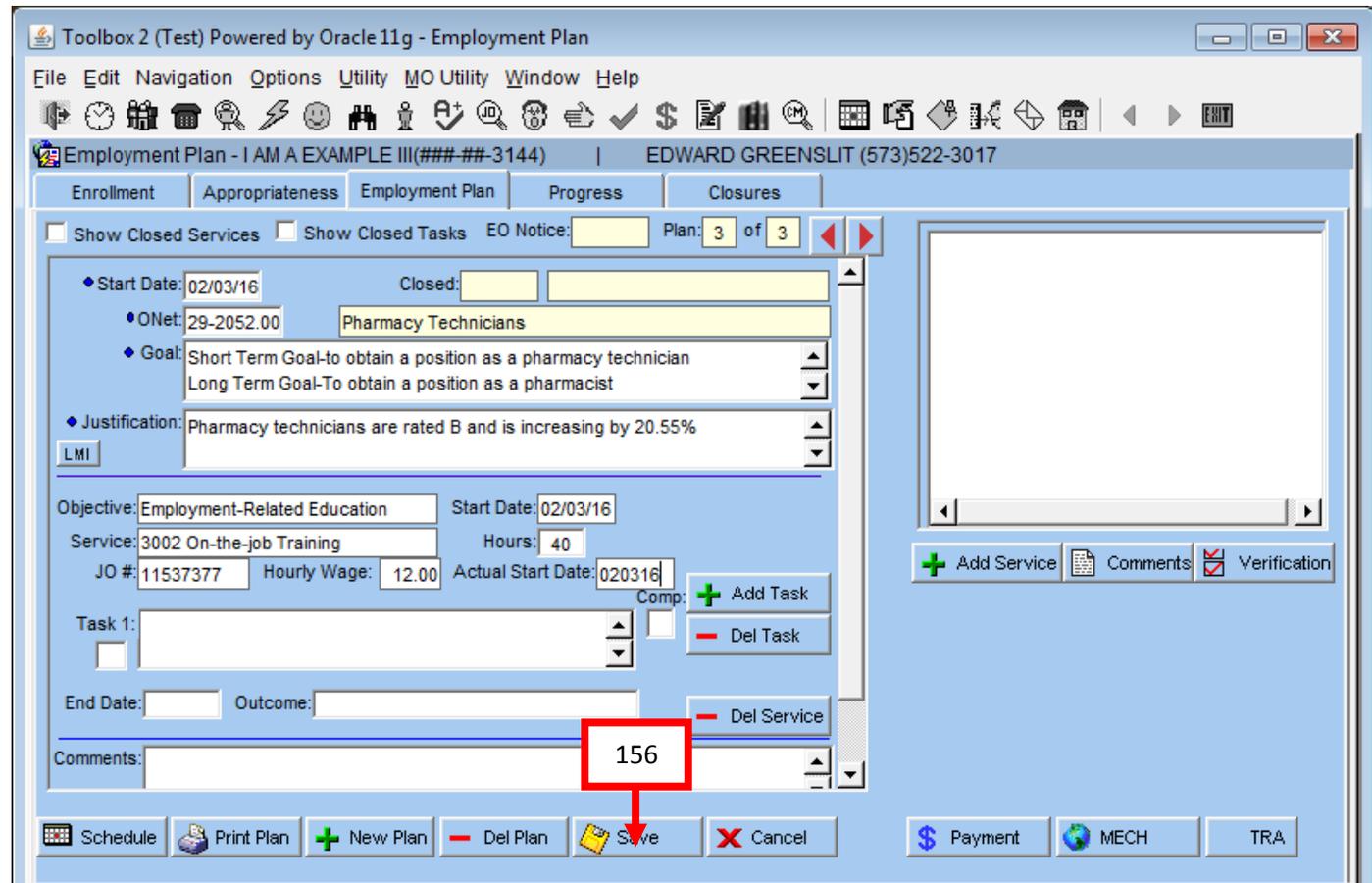


- 151. The **Objective** and **Service** now displays in the boxes.
- 152. **Start Date:** Automatically enters the current date.
- 153. **JO #:** Enter the OJT Job Order number (client must be listed as a referral to this job order and job order must still be open).
- 154. **Hourly Wage:** Enter in the hourly wage for this OJT job order.
- 155. **Actual Start Date:** Enter date the training actually begins

NOTE: Staff has the ability to backdate a service 7 days – be careful as the service date should not precede the enrollment start date. Actual Start Date must be entered into a service note.

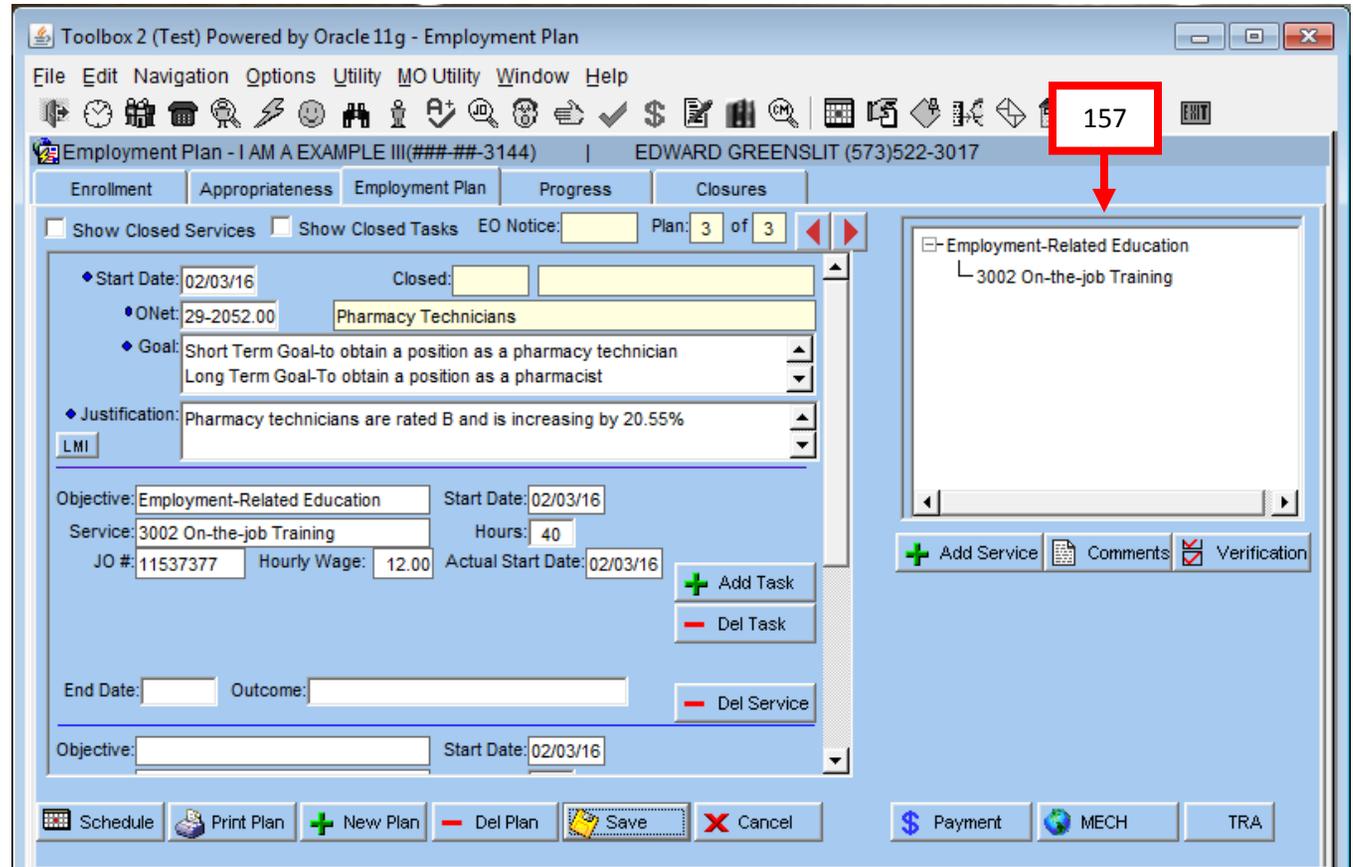


156. Click **Save** button.



157. The service is now saved to the Employment Plan and now displays in the Employment Plan tree.

NOTE: WIOA 3000 level services will prevent a participant from exiting indefinitely. 3000 level services **MUST** be closed when the participant completes training.



Once the participant has completed training, the 3002 On-The-Job training service must be closed.

158. Double-Click in the **End Date** field. This will bring up a calendar.

159. Click the **OK** button.

160. Double-click in the **Outcome** field. This will bring up a list of values containing the outcomes available.

161. Choose the outcome you wish to use.

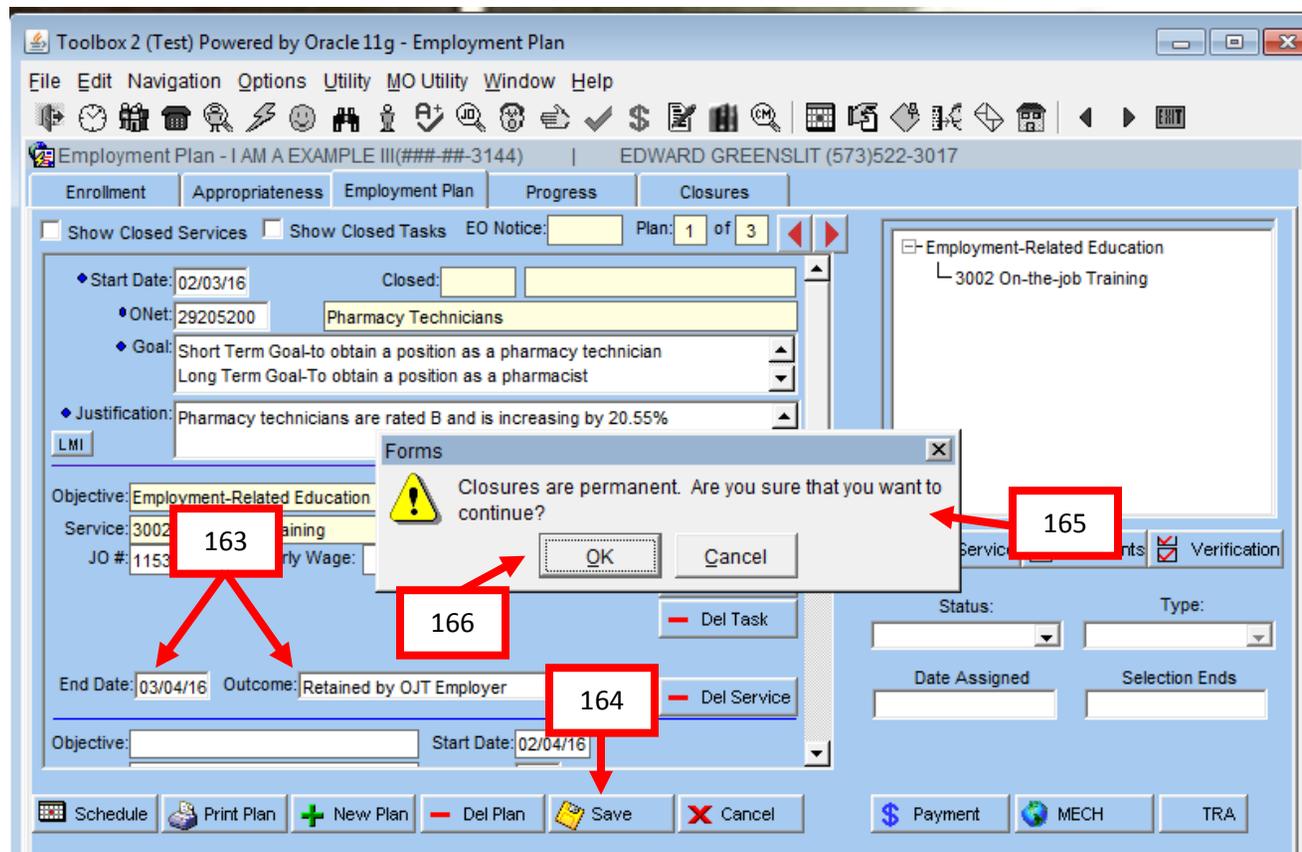
162. Click **OK** button.

163. The **End Date** and **Outcome** fields are now populated.

164. Click **Save** button.

165. After Save a popup will appear informing you that Closures are permanent.

166. Click **OK** button



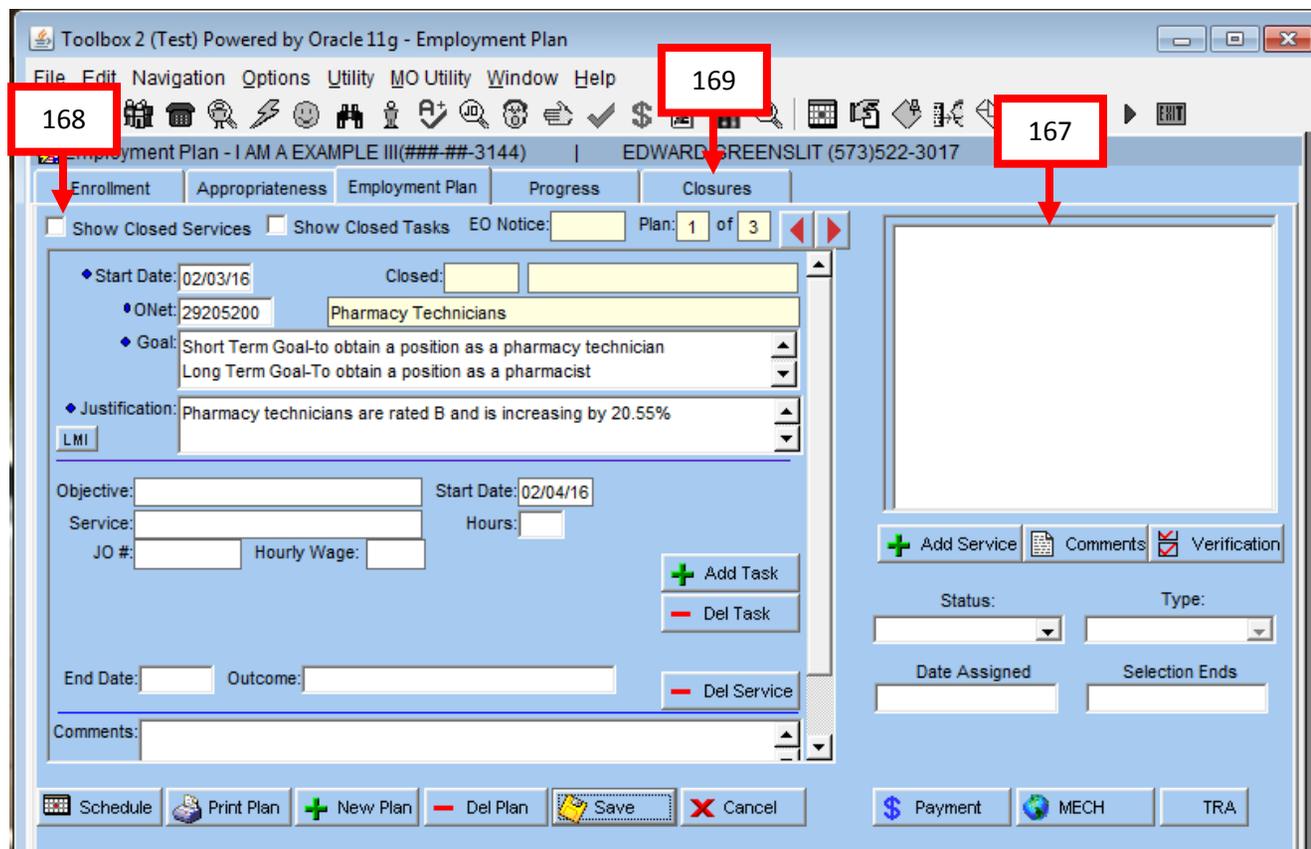
167. Service has been closed and no longer is shown in the Employment Plan tree

168. If you need to view closed services, put a check in the **Show Closed Services** box.

169. Click on the **Closures** tab

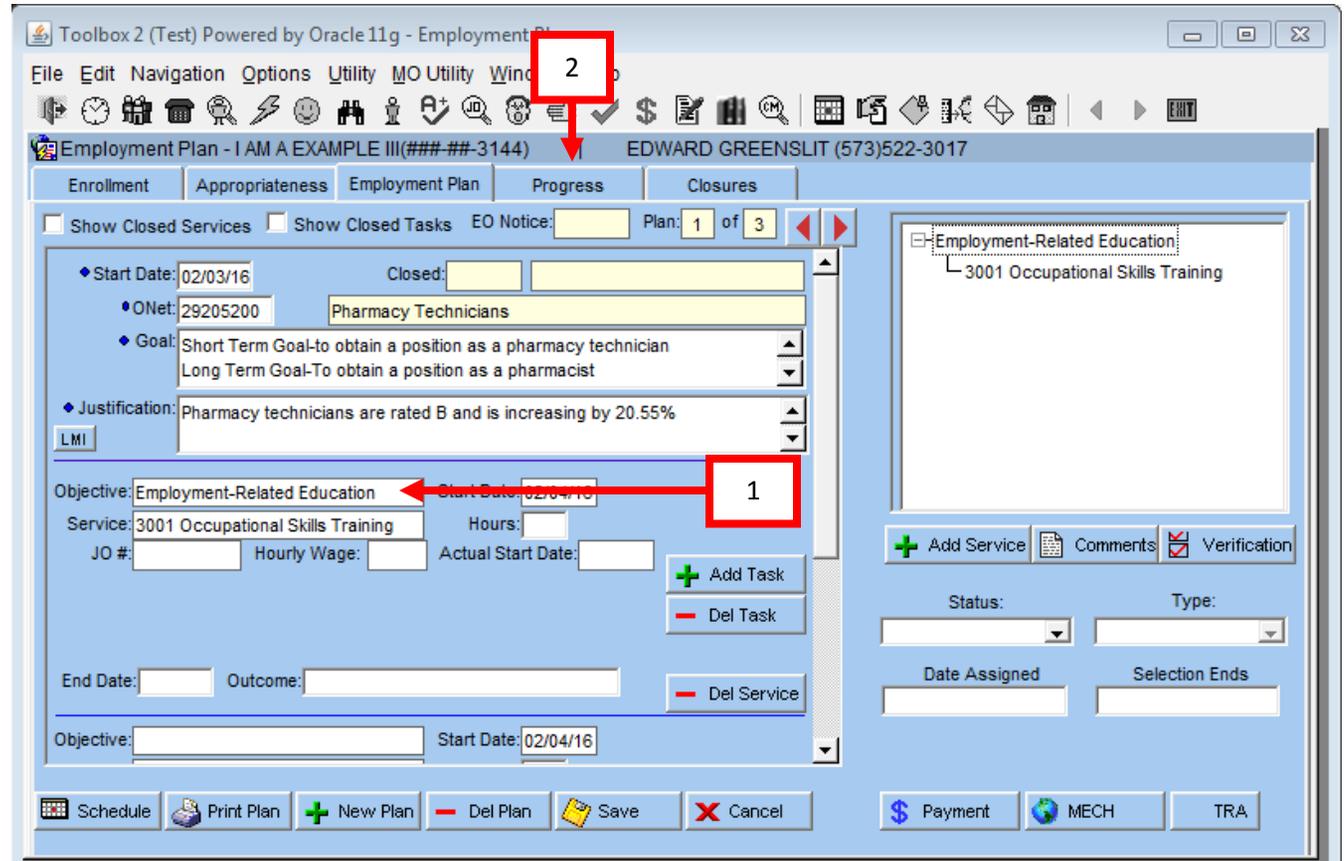
NOTE: Services can also be closed on the closures tab. All Employment Plan Services are closed using the same steps above.

After 90 days of no countable service recorded in the record, the customer will automatically Exit the WIOA Adult Program

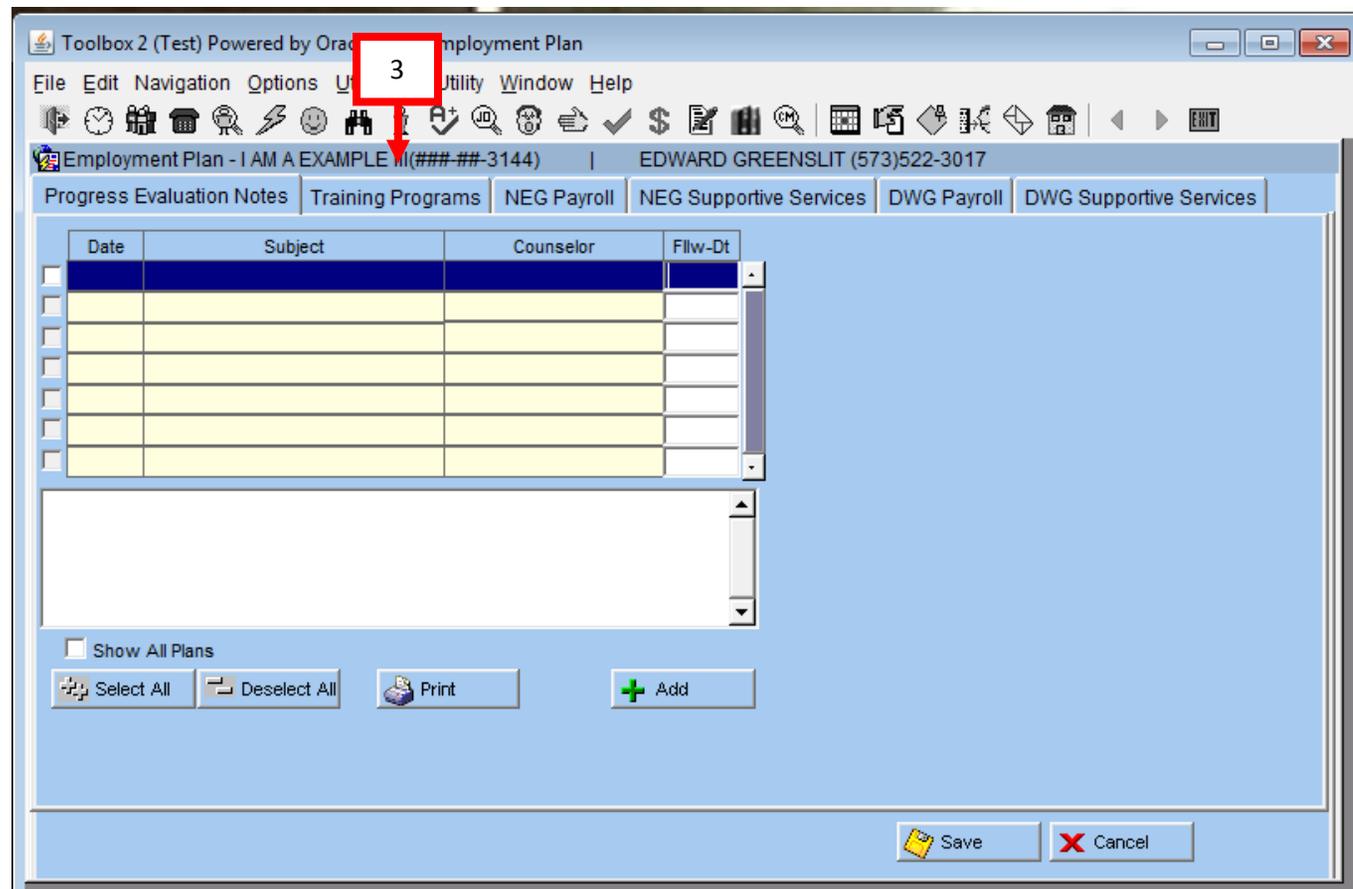


Progress Tab-This tab must be used if the participant is in a 3001 Occupational Skills Training service

1. After the **3001 Occupational Skills Training** has been added to the employment plan
2. Choose the **Progress** tab



3. Choose the **Training Program** tab



4. Enter **Actual Start Date**
5. Choose **School Name** from drop down
6. Choose **Degree/Certificate** type
7. Choose **Training Type**
8. Enter **Contact Name** if you have it
9. Enter **Contact Phone** if you have it
10. Enter **Projected Completion** date

11. Click **Save** button

Toolbox 2 (Test) Powered by Oracle 11g - Employment Plan

File Edit Navigation Options Utility MO Utility Window Help

Employment Plan - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017

Progress Evaluation Notes Training Programs NEG Payroll NEG Supportive Services DWG Payroll DWG Supportive Services

WIDA Training Programs

Actual Start Date: 02/04/16

School Name: ELDON CAREER CENTER-ELDON CAREER CENTER

Training Program: 510805-PHARMACY TECHNICIAN C0

Trade Act Training Programs

Training Type: Full Time

Contact Name: Instructor Joe

Contact Phone: (573)111-1111

ETPS

ITA

Funded Amt:

Pell Grant Amt:

Refund Amt:

Projected Completion: 03/17/16

Actual Completion:

Online Training

Incumbent Worker

Associate Degree

Certificate Obtained

Show Completed

+ Add - Delete

11

Save Cancel

Closing out Training program on the Progress Tab-

- 12. Enter the actual completion date of the training
- 13. If a certificate was obtained check the checkbox for **Certificate Obtained**
- 14. Choose type of certificate obtained

The screenshot shows the 'Employment Plan' software interface. The 'Training Programs' tab is active. The 'Actual Start Date' is 02/04/16. The 'School Name' is ELDON CAREER CENTER-ELDON CAREER CENTER. The 'Training Program' is 510805-PHARMACY TECHNICIAN. The 'Training Type' is Full Time. The 'Contact Name' is Instructor Joe. The 'Contact Phone' is (573)111-1111. The 'Projected Completion' is 03/17/16. The 'Actual Completion' field is highlighted with a red box and labeled 12. The 'Certificate Obtained' checkbox is checked, and it is highlighted with a red box and labeled 13. The 'Certificate Type' dropdown menu is highlighted with a red box and labeled 14. The interface also includes 'Add' and 'Delete' buttons, and 'Save' and 'Cancel' buttons at the bottom right.

15. Click **Save** button

NOTE: You must still enter the credential information on the Exit Snapshot

Toolbox 2 (Test) Powered by Oracle 11g - Employment Plan

File Edit Navigation Options Utility MO Utility Window Help

Employment Plan - I AM A EXAMPLE III(###-##-3144) | EDWARD GREENSLIT (573)522-3017

Progress Evaluation Notes Training Programs NEG Payroll NEG Supportive Services DWG Payroll DWG Supportive Services

WIOA Training Programs

Actual Start Date: 02/04/16

School Name: ELDON CAREER CENTER-ELDON CAREER CENTER

Training Program: 510805-PHARMACY TECHNICIAN C0

Trade Act Training Programs

Training Type: Full Time

Contact Name: Instructor Joe

Contact Phone: (573)111-1111

ETPS

ITA

Funded Amt:

Pell Grant Amt:

Refund Amt:

Projected Completion: 03/17/16

Actual Completion: 03/17/16

Certificate Obtained

CERTIFICATE

Show Completed

Online Training

Incumbent Worker

Associate Degree

+ Add - Delete

Save Cancel