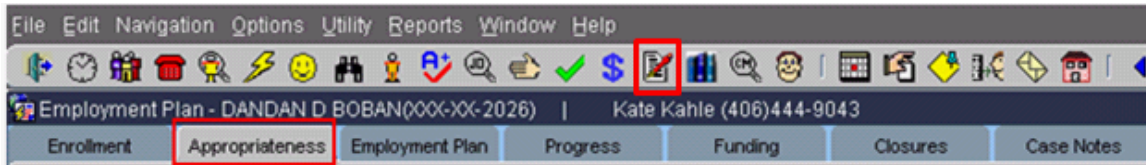


WIOA EMPLOYMENT PLAN, PART 2: APPROPRIATENESS AND PROGRESS TABS

Appropriateness:




Completion of the Appropriateness tab is required prior to entering a participant in a training service. Training services include the following services:

- On the Job Training
- Occupational Skills Training
- Customized Training
- Combined Workforce Training with Related Instruction
- Entrepreneurial Training
- ABE/Literacy Combined with Training
- Skills Upgrade and Retraining

Each question needs to be answered and a relevant comment needs to be entered. The statements need to be accurate and true.

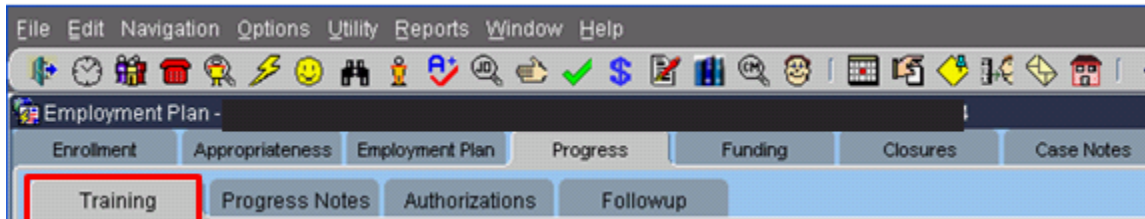
A screenshot of the "Appropriateness" tab in the software interface. The form contains several questions with "Yes" dropdown menus and text input fields. The questions are: "Is the customer unable to achieve self-sufficiency/suitable employment in intensive services based on program requirements?" (with a "Version: 2" dropdown), "Will the customer benefit from the selected training based on the skills provided by the proposed training program and the customer's current skill level?", "Based on LMI sources for the customer's employment goal, is there a reasonable expectation of employment upon completion of the selected training?", and "Is the selected training reasonably accessible to the customer from a governmental or private institution or facility?". Each question has a corresponding text input field with a scroll bar. At the bottom of the form, there is a red box highlighting the "Completed Date" field (containing "08/24/12") and the "Training Services must be added to plan by:" field (containing "11/22/12"). To the right of these fields are buttons for "Record", "Add", "Save", and "Cancel".

When the Appropriateness tab is complete, double click in the Completed Date box and enter today's date. You will receive a message stating that training services must be entered within three months of the Completed Date. If training

services are not added within three months, you will need to complete the Appropriateness tab again, using the  button.

A copy of the Appropriateness tab can be printed if documentation of TAA training criteria is needed for the participant's file.

Progress-Training:



A training record must be completed on the Training tab if any of these training services are provided:

- On the Job Training
- Occupational Skills Training
- Customized Training
- Combined Workforce Training with Related Instruction
- Entrepreneurial Training
- ABE/Literacy Combined with Training
- Skills Upgrade and Retraining

It is not necessary to enter short term training provided using Short Term Prevocational Services on this tab. Training covered under this service includes individual courses such as computer courses that are less than 40 hours of training and do not provide an industry-recognized certificate.

See the WIOA Policy Manual, Section 4.70 Certificates to determine if the training provides an industry-recognized certificate, and to determine if the correct service is being used for training.

Employment Plan -

Enrollment Appropriateness Employment Plan Progress Funding Closures

Training Progress Notes Authorizations Followup

Program

Dental Hygiene

+ Add - Delete

Name: MSU-MSU - GREAT FALLS, COT...

Service: Occupational Skills Training

Actual Start Date: 08/27/12

* Projected Completion: 05/10/14

Actual Completion:

Withdraw from training

ONet: 29202100 Dental Hygienists

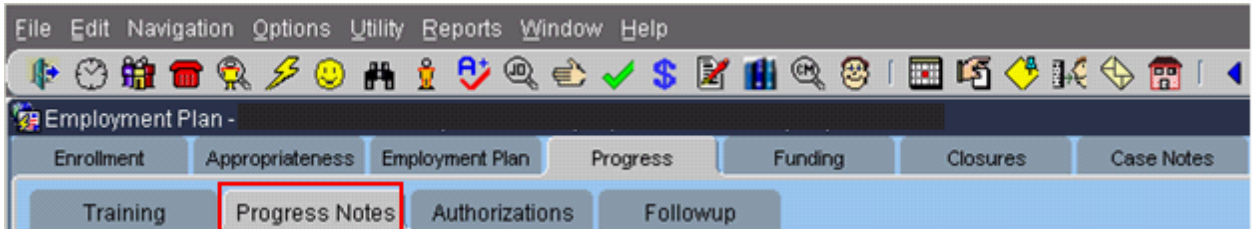
Show Completed

- Name: Click on the dropdown to get a list of eligible training providers. If providing On the Job Training (OJT), or the participant is attending training that is on another state's Eligible Training Provider list, choose "Non-Approved-Montana" at the top of the list.
- The blank box is for an employer name if providing an OJT or for an out of state training institution.
- Program: Double click in the Program field to get a list of approved training programs for the training provider. If providing an OJT, enter "OJT" in this field. If an out of state training provider is used, enter the name of the training program.
- Service: Double click in the Service field to choose from a list of training services.
- Actual Start Date: Enter the date the participant started training. The Actual Start Date cannot be entered until the day the training starts and must be entered within 60 days of the start date. This date must match your source of documentation.
- Projected Completion: Enter the date that training is expected to end.
- Actual Completion: Enter the date the participant completed or withdrew from training. This date must match your source of documentation.
- Withdrew from training: Check the box if the participant did not complete training.
- ONet: Enter the ONet code for the training program.
- Just a reminder—case notes can be used for documentation of training start and end dates.

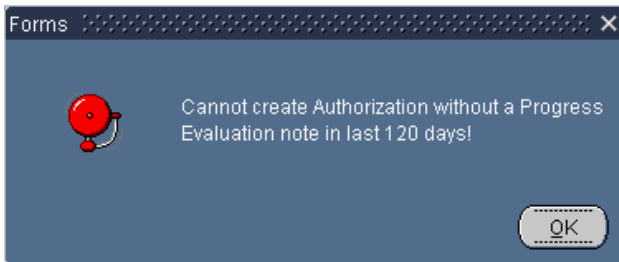
Training may not appear on this tab if the actual completion date for training has been entered. Click on Show Completed if training has ended and an end date has been entered on the Training tab. This will show all training entered on the Training tab.

To view all trainings, completed and current, check the Show Completed box.

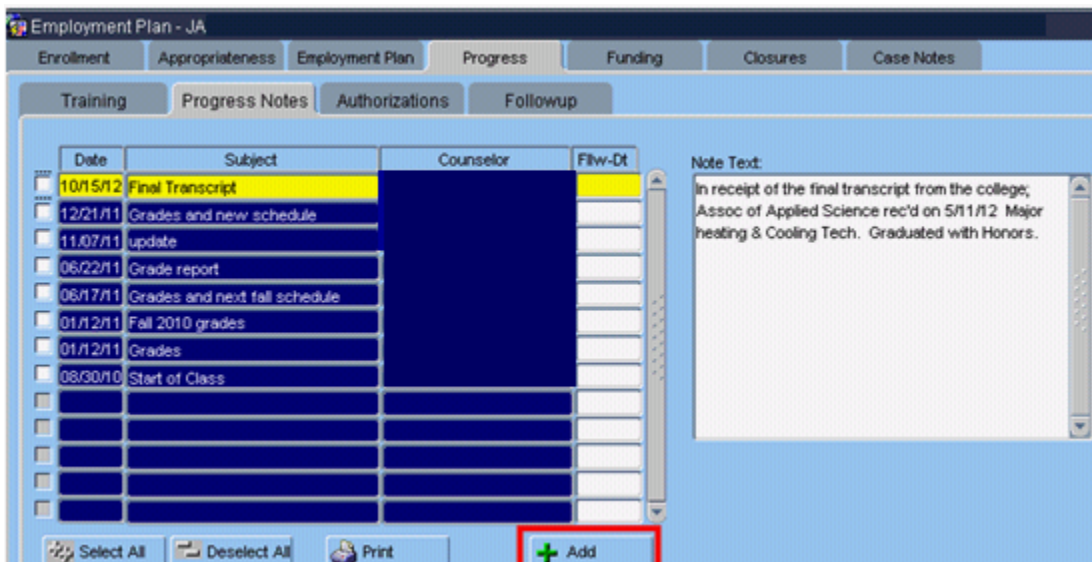
Progress-Progress Notes:



Periodic progress notes are required to be entered in the Progress tab for participants who are in training. No authorizations or payments may be made until a progress note has been added.



Click the button to add a new progress note.



You can use the format provided, or you can delete the format and add your own notes.

Create Note for Seeker -

Category: Progress Evaluation

Date: 01/11/13 By: [Redacted]

Subject: CNA course training evaluation

Notes:

1. Based on the tasks in the plan. Is progress being made as deemed appropriate? Yes, has done very well so far
2. What documentation was obtained to evaluate progress? Note from training institution
3. If applicable, what problem solving steps were determined? Needed glasses to correct eye strain. These were purchased 1/4/13.

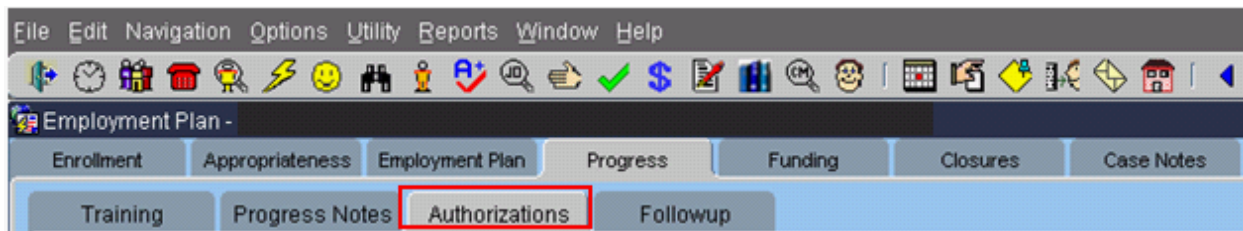
Follow-up Date: [Empty]

Print on Save

Save Close

Progress notes should be added for anything that relates to **the** completion of training in the participant's plan. These notes **do not** need to be duplicated in the Case Notes section. Be aware that notes on the Progress tab are visible to ALL users!

Progress-Authorizations:



The Authorizations tab shows a breakdown of training authorizations/payments and support service authorizations/payments.

Employment Plan -

Enrollment Appropriateness **Employment Plan** Progress Funding Closures Case Notes

Training Progress Notes **Authorizations** Followup

Show All Plans

Training Authorizations

Date	Provider	Authorized	Paid	In Full
11/30/11	SPECTRUM MEDIK	45.00	45.00	<input checked="" type="checkbox"/>
11/04/11	RO SIN MONA E	93.00	93.00	<input checked="" type="checkbox"/>
09/13/11	SPECTRUM MEDIK	400.00	400.00	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
Totals:		538.00	538.00	

Support Services Authorizations

Date	Provider	Authorized	Paid	In Full
02/01/12	RO SIN MONA E	133.00	133.00	<input checked="" type="checkbox"/>
11/23/11	RANIERI, SANDR.	585.00	585.00	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
Totals:		718.00	718.00	

The Follow-up tab directions are located in WIOA Employment Plan Part 5.

If you have any difficulties, or receive a message in the lower left-hand corner that says, "Field protected against update," email the WIOA Mworks Help Desk at DDLWSDMWorksWIOAHelp@mt.gov or email/call one of the WIOA staff.

Continue with 'WIOA Employment Plan Part 3.'