# **ENTERING CREDENTIALS INSTRUCTIONS**

NOTE: Credentials must be entered on both the TAA Application and the WIOA Application for co-enrolled participants. The system does not transfer the data entered from one application to the other.

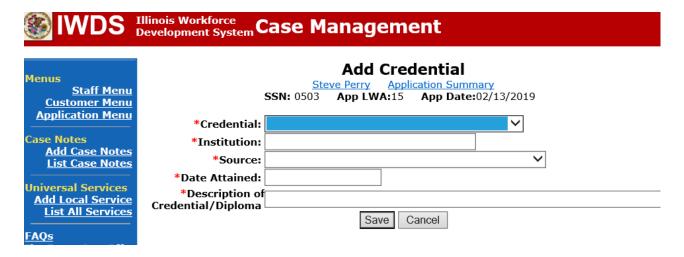
Click on **Credentials** on the **Application Menu** on the **TAA Application** for the participant.



### Click Add Credential.



Complete the fields on the screen.



### **Credential options:**

H.S. Diploma / Equivalency / G.E.D.

A.A. or A.S. Diploma / Degree

B.A. or B.S. Diploma / Degree

Occupational Skills License

Occupational Skills Certificate or Credential

Other Recognized Diploma, Degree, or Certificate

Occupational Certification

Graduate/Post Graduate

**Institution:** Enter the name of the training institution that awarded the credential.

### **Source options:**

Copy of certificate

Copy of credential

Copy of degree

Copy of diploma

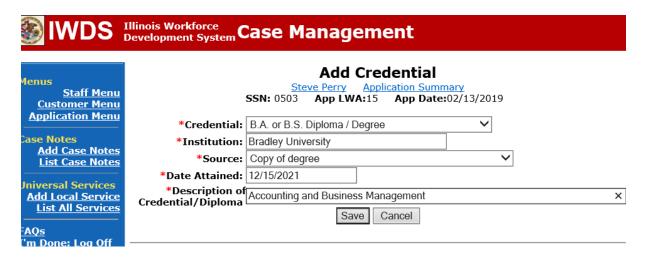
Copy of Graduation List

Written verification or transcript from training institution

Date attained: Enter the date the institution awarded the credential.

**Description of Credential/Diploma:** Provide a description of the credential/diploma, such as the type of program completed, occupational field, etc.

Once all fields have been entered, click Save.



The credential has been added to the Credentials Screen.



Add **Case Management Services** in IWDS on the WIOA and Trade applications based on the following:

For participants covered by certifications numbered up to 97,999:

Trade Application:

Trade Application Entry (Add Additional Episode to Trade Case Management Service Record)

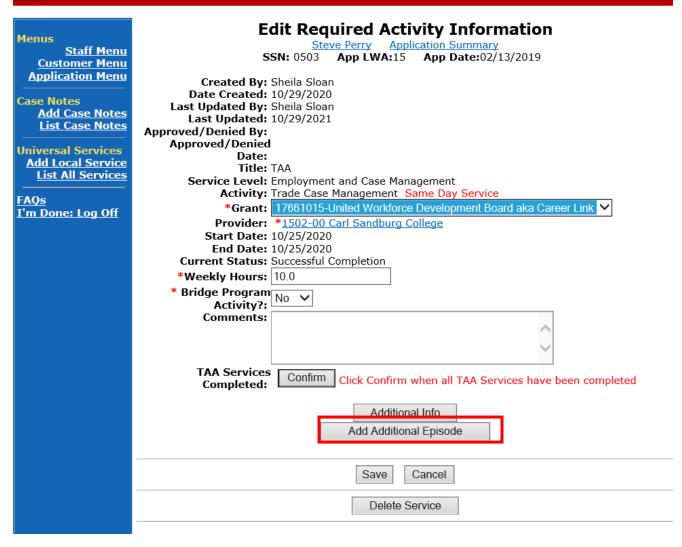
Click List Enrolled Services on the Application Menu on the TAA Application for the participant.



### Click on Trade Case Management - TAA.







Complete the following fields:

**Contact Date** – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

**Program** – Select **TAA/NAFTA** from the drop down list.

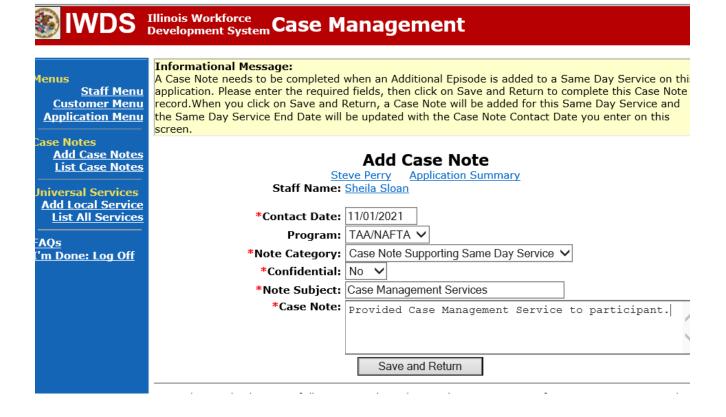
**Note Category** – Select the appropriate entry from the drop down list.

Confidential – Select Yes or No to indicate if the case note is confidential.

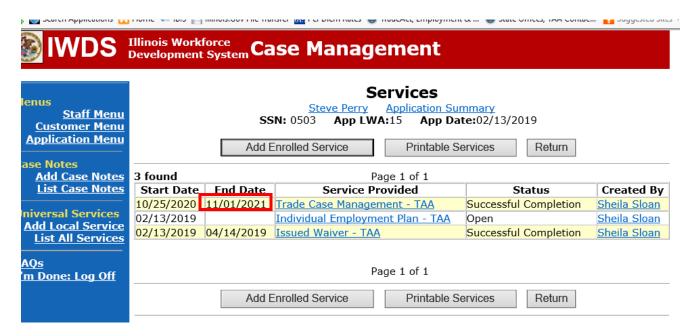
**Note Subject** – Enter a subject for the case note that describes what service is being provided.

**Case Note** – Enter a detailed case note detailing the case management service that is being provided to the participant.

Click Save and Return.



NOTE: The End Date for the Trade Case Management – TAA Service Record has updated with the current date of the entry that was just made.



WIOA Application: No Entry.

For those participants covered by certifications numbered 98,000+ (2021R):

Trade Application: No entry.

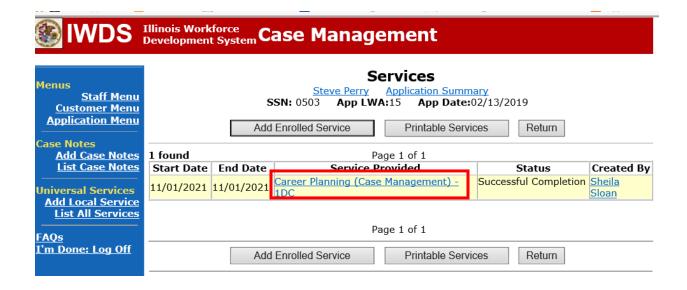
**WIOA Application:** 

WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).

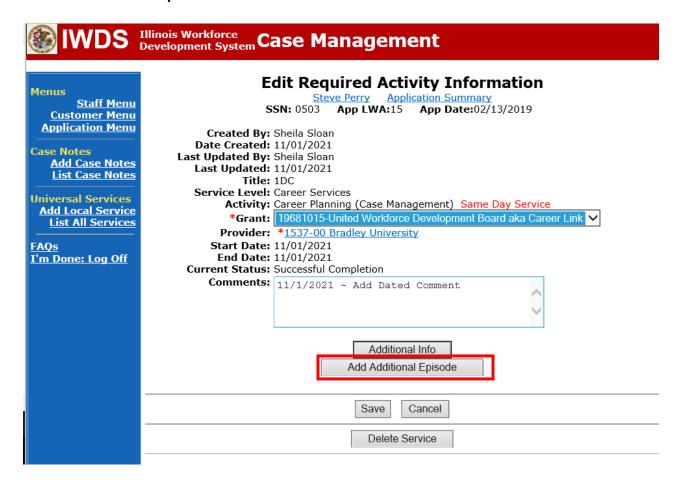
Click **List Enrolled Services** on the **Application Menu** on the **WIOA Application** for the participant.



Click on Career Planning (Case Management) – 1DC.



Click Add Additional Episode.



Complete the following fields:

**Contact Date** – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

**Program** – Select **WIOA** from the drop down list.

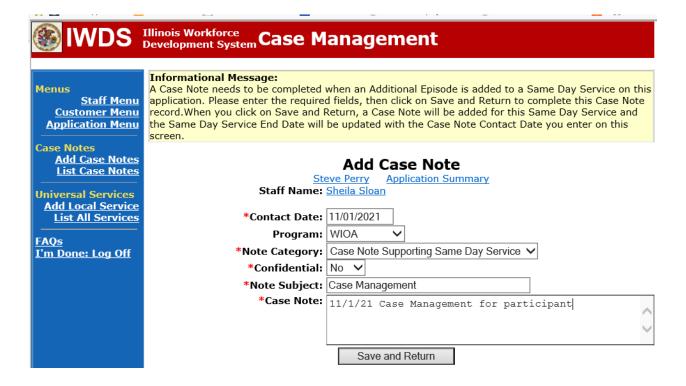
**Note Category** – Select the appropriate entry from the drop down list.

**Confidential** – Select **Yes** or **No** to indicate if the case note is confidential.

**Note Subject** – Enter a subject for the case note that describes what service is being provided.

**Case Note** – Enter a detailed case note detailing the case management service that is being provided to the participant.

#### Click Save and Return.

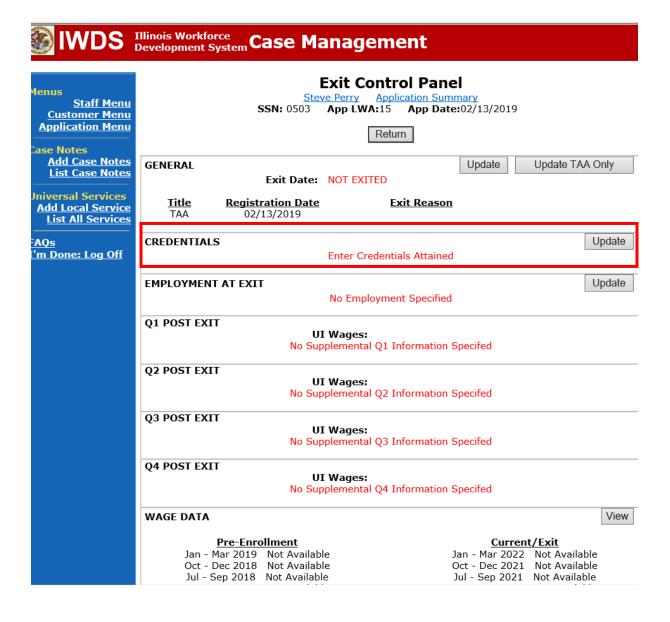


Upon exit of the participant, also make sure to entercredentials earned on the **Exit Control Panel Screen**.

Click Exit Summary on the Application Menu on the TAA Application for the participant.

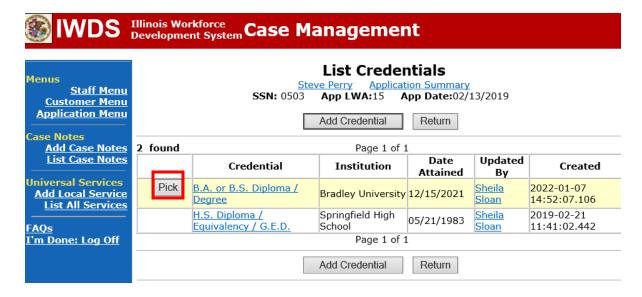


## Click **Update** for the **Credentials** section.



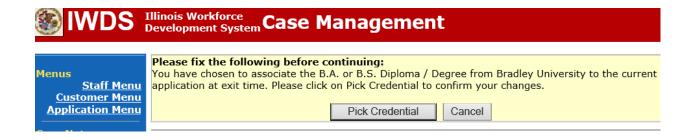
The system will transfer you to the **List Credentials Screen** in IWDS.

Click **Pick** beside the appropriate credential.



The system will ask you to confirm your selection. If the correct credential is listed, click **Pick Credential**.

If it is not the correct credential, click **Cancel** to return to the **List Credentials Screen** to select the correct credential.



The credential has been added to the Exit Control Panel Screen.

