Online Learning Opportunities Desk Aid – Metrix Learning

Helpful Tips to Remember for Eligibility Determination

1. Workforce Solutions no longer provides basic/short-term services. Therefore, eligibility must be determined using the [Financial Aid Standards and Guidelines](#) and [Financial Aid Priority Criteria](#).

2. **Expedited Eligibility**: must be used when a customer is certified under Trade Adjustment Assistance (TAA) or outreached for RESEA within the last ten (10) weeks.
   - Customers who receive expedited eligibility only have to prove selective service registration, if applicable. **Do not ask these customers to submit a Financial Aid Intake Form or proof of household income.** Refer to [Financial Aid Standards and Guidelines](#), Appendix A: Dislocated Worker Category 1, page 29.

3. An IEP/ISS must be completed in accordance with the [Individual Employment Plan (IEP), Change 2](#).

4. **Adding Adult/DW Metrix Services – Certification Track Training (Appendix C) and General Online Coursework (Appendix D)**
   - Before staff enter the applicable Metrix Service, look at the ⊞ Activities / Enrollments / Services Tab in WIT to make sure the WIOA **service sequencing** has been entered correctly for the Adult or Dislocated Worker.

     WIOA Adult and Dislocated Worker Program Sequence of Services
     - o 1st Service Must Be: 203 – Comprehensive Objective Assessment
     - o 2nd Service Must Be: 205 – Individual Employment Plan (IEP)
     - o 3rd Rule: All Remaining services become available except for follow-up services.

   - If services 203 Comprehensive Objective Assessment and 205 Individual Employment Plan (IEP/EDP) **does not** show as a selection in the dropdown; this means that one or both services **were not** entered prior to conversion.

   - Staff will need to go back to Program Ribbon to open ⊞ Activities / Enrollments / Services tab to verify if these services have been entered. If one or both have not been entered; **the missing services must be provided and entered before** the system will allow any other services to be added. Please note:
     - o Staff may see that the service 68 converted; however, this will not suffice for the 205 required service; **the 205 service must be entered**.

5. **Adding Youth Metrix Services – Certification Track Training (Appendix C) and General Online Coursework (Appendix D)**
   - Before staff enter the applicable Metrix Service, look at the ⊞ Activities / Enrollments / Services Tab in WIT to make sure the WIOA **service sequencing** has been entered correctly.

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WIOA Youth Program Sequence of Services
- o 1st Service Must Be: 412 – Comprehensive Objective Assessment
- o 2nd Service Must Be: 413 – Individual Service Strategies (ISS)
- o 3rd Rule: All Youth Element services become available (remaining 400 series services)
- o 4th Rule: After at least one Youth Element has been entered, the remaining services become available

- If services 412 Comprehensive Objective Assessment and 413 Individual Service Strategies (ISS)Employment Plan (IEP/EDP) show as a selection option, this means that one or both services **were not** entered prior to conversion.

- Staff will need to go back to Program Ribbon to open **⊞ Activities / Enrollments / Services** tab to verify if these services have been entered. If one or both have not been entered; **the missing services must be provided and entered before** the system will allow any other services to be added. Please note:
  - o Staff may see that the service 68 converted; **however, this will not suffice for the 413 required service; the 413 service must be entered.**

Documenting Metrix Learning Eligibility, Enrollment, and Services:

1. Appropriate staff must obtain WIOA eligibility documents and upload all supporting documents into WorkInTexas.com in *Documents (Staff)* under *Staff Profiles—General Profile*.
   a) Eligibility documents include the following:
      - Proof of Age.
      - Eligibility to work in the United States and include a completed Authorization to Work checklist,
      - Selective Service registration, as applicable, for male participants, and
      - Orientation to Complaint Form (OTC).
      - Indicate the dislocation criteria for dislocated worker eligible customers
      - Indicate in-school or out-of-school criteria for youth eligible customers
      - Indicate economic eligibility criteria for adult eligible customers

2. Create or update all sections of the Wagner-Peyser (WP) application
   - Enter all information required to meet WIOA Adult, Dislocated Worker, or Youth program eligibility (statewide).

3. Create an Individual Employment Plan/Individual Service Strategy (IEP/ISS).

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4. Enter a case note with subject line **"*Metrix Assessment*"** documenting the following:
   - Metrix Initial Assessment,
   - Specific Metrix industry certification track (***limit one certification per customer***); or General online coursework pathway

5. WIOA Program Application, Eligibility Summary; add the **Metrix Grant** to the **Grants** section in WIT, staff must: **PATH >** Click the Pencil Icon from the WIOA Application in order to edit the individuals Eligibility Summary.
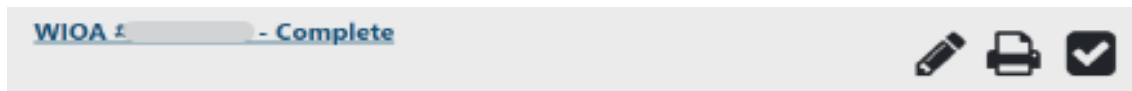
Page Displays showing WIOA Application, staff will click on Eligibility Summary page displays Applicant Eligibility

Scroll to bottom of page to add the appropriate grant from the Action Column (Statewide Adult, Statewide Dislocated Worker, or Statewide Youth)

6. Select **Add** and click **Finish** at the bottom of the page to save changes to the individual's WIOA grant eligibility summary.

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7. Click **Return to Programs Tab**

8. Assist an Individual > Staff Profiles > Case Management Profile > Programs

- Scroll down to the **WIOA Program Ribbon**
  - **Click on** ✚ **Activities / Enrollments / Services**
  - **Click on** Create Activity / Enrollment / Service

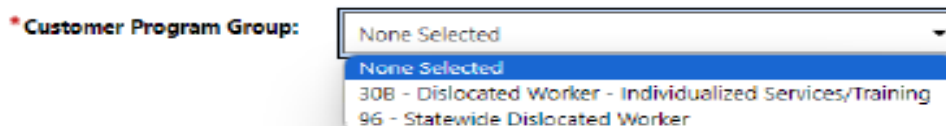9. Select the applicable **Program Group** for the participant you are assisting Examples of **Customer Program Groups** – (Select the applicable fund)

- **93 - Statewide Adult**
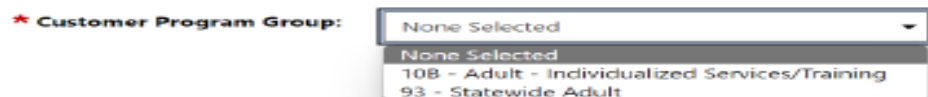
- **96 - Statewide Dislocated Worker**

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- **90 - Statewide Youth (In-School or Out-of-School)**

*Customer Program Group:

None Selected ▼
None Selected
20E - Youth Out School
90 - Statewide Youth

10. LWDB – Board area auto-populates; verify correct Board is displaying.

11. Office Location – Select from the dropdown your office location.

*LWDB: Gulf Coast WF Board ▼

*Office Location: 426 WF Solutions Huntsville ▼

12. Select **Grant** – Add the applicable WIOA Grant Name

- WIOA Statewide Adult **METXA – Metrix – WIOA Adult Grant**

Grant: METADT - Metrix - WIOA Adult Grant ▼

WIOA or Non-WIOA Partner Program:
None Selected
WIOA Adult Statewide
METADT - Metrix - WIOA Adult Grant

- **WIOA Statewide Dislocated Worker METXDW – Metrix – WIOA DW Grant**

Grant: None Selected ▼

WIOA or Non-WIOA Partner Program:
None Selected
WIOA Dislocated Worker Statewide
METDW - Metrix - WIOA DW Grant

- **Statewide Youth METYTH – Metrix – WIOA YOUTH Grant**

Grant: METYTH - Metrix - WIOA Youth Grant ▼
None Selected
WIOA Youth Statewide
METYTH – Metrix - WIOA Youth Grant

13. Select **Activity Code: 328** - Occupational Vocational Training (Non-ITA) for Metrix Industry Certification Track Training and Assistance **(Adult/Dislocated Worker)**; or

Status	ID #	Activity / Provider	Actions	Funding / Grant
🟢	____	328 - Occupational/Vocational Training (Non-ITA) ComputerMinds.com	Ⓦ	Statewide Dislocated Worker METXDW - Metrix - WIOA DW Grant

Select Activity Code: 269 - Short-term Work Readiness Services for General Online Coursework, including job readiness courses or other online courses **not** intended to lead to Metrix Industry Certification **(Adult/Dislocated Worker)**

Status	ID #	Activity / Provider	Actions	Funding / Grant
🟢	____	269 - Short-term Work Readiness Services No Provider Information	Ⓦ	Statewide Adult METADT - Metrix - WIOA Adult Grant

Select Activity Code 454 – Occupational Vocational Training (Non-ITA) - for Metrix Industry Certification Track Training and Assistance **(Youth Funded).**

Status	ID #	Activity / Provider	Actions	Funding / Grant
🟢	3470383	454 - Occupational/Vocational Training (Non-ITA) - Youth Funded Metrix Learning	Ⓦ	statewide Youth WIOA Youth Statewide

Select Activity Code 459 - Short-term Educational Services - for General Online Coursework, including job readiness courses or other online courses **not** intended to lead to Metrix Industry Certification Assistance **(Youth Funded).**

Status	ID #	Activity / Provider	Actions	Funding / Grant
🟢	4757918	459 - Short-term Educational Services - Youth Funded No Provider Information	Ⓦ	Statewide Youth METYTH - Metrix - WIOA Youth Grant

14. Enter the following dates as the Actual Begin Date and Projected End Dates:

- **Actual Begin date:** The date the participant begins receiving Metrix Industry Certification Assistance
- **Projected End Date:** Enter the estimated date of completion for Projected End Date (this date cannot be more that 31 days).

* An actual begin date or a projected begin date is required.

Projected Begin Date: [   ] (mm/dd/yyyy) 📷 Today

Actual Begin Date: [   ] (mm/dd/yyyy) 📷 Today

* **Projected End Date:** [   ] (mm/dd/yyyy) 📷 Today

Service Provided Virtual/Online ☑: [No Virtual/Online, In-person Only ▼]

<u>Recommendation: Enter the projected end date as the last day of the month and for the next month's entry staff can extend the projected end date for the end of the following month.</u>

15. If staff select the service 328 or 454 Occupational Vocational Training (Non-ITA), the system will add the required questions below:

- Participant has been issued an ITA and the ITA will pay for this service. Select **"No"**

* **Participant has been issued an ITA and the ITA will pay for this service:** [No ▼] — None Selected / Yes / **No**

16. Enter a case note with subject line "Eligible Metrix" documenting the following:
- Proof of Age.
- Eligibility to work in the United States and include a completed Authorization to Work checklist,
- Selective Service registration, as applicable, for male participants, and
- Orientation to Complaint Form (OTC).
- Indicate economic eligibility criteria met for adult eligible customers
- Indicate the dislocation criteria met for dislocated worker eligible customers
- Indicate in-school or out-of-school criteria met for youth eligible customers

17. Click **Next** to continue through the **Activity Enrollment** – **General Information Tabs**:

Activity Enrollment - General Information

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

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

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- **Service Provider Tab** – this tab will auto-populate.
  - Service Provider
  - Select Provider – Metrix Learning
  - Select Service, Course, or Contract: Metrix General Online Coursework or Metrix Industry Certification
  - Enter the Occupational Training Code

Activity Enrollment - Service Information

Activity Enrollment – Service Information
This page displays activity service and worksite information for the specified participant.

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

- Enrollment Cost: Metrix **will not** have any activity costs. All cost fields should be set to zero.

Activity Enrollment - Service Costs

Activity Enrollment – Service Costs
This page displays activity cost information for the specified participant.

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

18. Closure Information Tab

- Closure Information (once training and assistance services are completed) – This is **only required for the Certification Track training**; this **is not** required for the General Online courses.
- Enter the final date of certification assistance (which may be the date of certification testing) for the Last Activity Date of the service.
- Select appropriate Completion Code.

Closure Information

Closure Information
This page displays activity closure information for the specified participant.

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

Notification to Board Staff of Industry Certifications <u>Only</u>:

1. **After eligibility is determined and services entered, <u>only designated Metrix Administrators</u>** are permitted and required to submit an email to the Gulf Coast Workforce Board at <u>online.learning@wrksolutions.com</u> to notify them of customers enrolled in **Industry Certification Tracks (services 328 and 454) only**. *<u>Staff are not permitted to email Metrix directly.</u>*

The notification email must include**:**
- Customer first and last name
- Email Address and phone number
- **Customer Zip Code**
- **WIT State Identification Number**
- Specific Industry Certification Track (Appendix D)

2. **Board staff will review each case to ensure eligibility is determined, services entered; and add the customer names to the Gulf Coast Metrix SharePoint spreadsheet.**
   - This action notifies Metrix staff of eligible customers to begin providing industry certification assistance.

3. *If a customer reports issues with their Metrix Learning account, office staff must notify their service provider's appointed Metrix Administrators. Administrators must first attempt to research and resolve the issue in the Metrix Portal.*
   - *Common errors: customer accounts were never setup; or courses are not assigned as required.*
   - *If Metrix Administrators cannot resolve the issue, they must email online.learning@wrksolutions.com for assistance. Board staff will then coordinate with Metrix staff for resolution and communicate with the Metrix Administrators.*

Provide Access to the Metrix Portal:
1. After eligibility for WIOA statewide grant has been determined and services entered; **only the designated Metrix Administrators** may provide the customer with Metrix Portal access.
   - Metrix Administrators are required to follow the [Texas Administrator Guide](#) for account setup and course assignment.

2. Once the account has been setup and courses assigned, the customer will receive an automated **"Welcome"** email with their login details to begin online courses.

Customer Progress
1. Metrix staff will provide limited case management services to eligible customers enrolled in Industry Certification Tracks.
   - Assistance with completing practice tests or labs
   - Issuing exam vouchers
   - Scheduling the certification exam at proctored locations

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Performance Outcomes

1. Workforce Solutions office staff must document monthly contact, and track performance in WIT for all *co-enrolled* customers; and those only enrolled in industry certifications to include, but not limited to:
   - Attendance and progress
   - Measurable Skill Gains,
   - Credential Attainment,
   - Employment

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Appendix A
Additional Online Learning Resource

In addition to Metrix, it is recommended staff share the following resources with customers as appropriate:

Workforce Solutions Online Learning Webpage:

Various lessons previously available only as live training has been converted into narrated PowerPoint presentations and are available on the Workforce Solutions website, including adult job search curriculum and WorkInTexas.com tutorials. This page also includes a calendar of all scheduled training and hiring events.

Houston Public Library

Houston Public Library (HPL) offers a variety of free online learning resources to anyone with an HLP card. Anyone with a state of Texas issued identification can get an HPL card by visiting My Link Card Registration – Houston Public Library (houstonlibrary.org)

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Appendix B
Metrix General Online Coursework Tracks

Course Name	Description
Artificial Intelligence (AI)	Introduction and advanced course of understanding AI and its applications for personal advancement.
Basic Skills	Academic and business math, writing, grammar, creative thinking, critical thinking essentials, problem solving. General Skills, personal skills, and workplace skills.
Business Skills	Administrative, analysis, business law, coaching/mentoring, employee management, financial/accounting, human resources, leadership, management, operations, QuickBooks, sales, sales/marketing, and writing.
Computer Skills	Coding/programming, databases, development/design, hardware/software, internet skills, MS Office 365 Suite, Mobile Apps, networks, operating systems (OS), security, software testing.
Construction	Coding/programming, databases, development/design, hardware/software, internet skills, MS Office 365 Suite, Mobile Apps, networks, operating systems (OS), security, software testing.
Digital Literacy	Digital literacy using a computer, mobile devices, Virtual Conferencing/Collaboration Apps how-to guide.
Google Apps	How to use Google Applications.
Healthcare	Healthcare basics and bloodborne pathogens awareness, HIPPA and Safety.
Job Readiness	Job readiness 1-4, Overcoming Barriers.
Job Search and Management	Managing strengths, career, work/life balance, presentation skills, professional networking, LinkedIn: setting up a profile, managing connections, posting updates, using network tools.
Management	Managing goals, leading and motivational strategies, confronting difficult employees, Preventing identity theft, active shooter course.
Manufacturing	Fundamentals, management, materials, safety, Supply Chain/Logistics, transportation, and equipment.
Other – Chinese Tracks	Basic skills, digital skills, MS Office 365 offered in Chinese language.
Other – Spanish Tracks	Basic academics, basic skills, computer skills, digital literacy, job readiness and professional development offered in Spanish language.
Professional Development	Develop a plan to further your career.
Retail Sales	Customer service, Food Industry, and management.
Salesforce	Learn how to use Salesforce Lightning program a Customer Relations Management (CRM) system.

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Appendix C
Metrix Industry Certification Tracks

CompTIA Industry Fundamentals (ITF+)
CompTIA A+ 220-1101
CompTIA A+ 220-1102
CompTIA Network+ N10 – 008
CompTIA Security+ SY0-601
CompTIA Cybersecurity Analyst (CySA+) CSO-002
ComTIA Cloud Essentials+
ComTIA Cloud+
ComTIA Server+
ComTIA Data+
ComTIA CASP+
ComTIA PenTest+
ComTIA Project+
ComTIA Linux+
Cisco CCNA 220-301
PMI Certified Associate in Project Management (CAPM)
PMI Project Management Professional (PMP)
PMI ACP
ASQ Six Sigma Yellow Belt
ASQ Six Sigma Green Belt
ASQ Six Sigma Black Belt
Certified Business Analysis Professional (CBAP)
Microsoft AZ-900: Microsoft Azure Fundamentals
AWS Certified Developer Associate
AWS Certified Solutions Architect Associate
AWS Certified Solutions Architect Professional
AWS Certified SysOps Administrator – Associate
AWS Certified Cloud Practitioner
AWS Certified DevOps Engineer Professionals
AWS Certified Machine Learning Specialty
ASQ – CMQ/OE
HCRI – PHR
HCRI – SPHR
Oracle Java SE 8 Programmer I IZO-808

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Appendix C
Metrix Industry Certification Tracks – Continued

SHRM CP
Certified Information Systems Auditor (CISA)
Certified Information Security Manager (CISM)
ISC2 – Certified Cloud Security Professional (CCSP)
ISC2 Certified Information Systems Security Professional (CISSP)
ITIL Foundation 4
ITSQB Software Testing Foundation Exam
PRINCE2 Foundation
Digital Marketing
Red Hat Certified System Administrator EX200K