**Using the WIOA State Plan Portal**

**Overview**

The Department of Education has created a portal for use by the WIOA partners for submitting Unified and Combined State Plans.

The portal will allow various agencies in your state to submit their portions of the plan independently and places this into the state plan. The output will be a single document which will be accessible and formatted.

We are organizing the information by taking the Information Collection approved by OMB and dividing this up into discrete questions — each of which is assigned a place in a master outline. By answering the question, the system will place your answer into the proper place in the outline.

**Ensuring Uniformity**

The portal will ensure that your state is submitting a consistently formatted document. To do so, we will automatically take you text and place it in the proper place in the outline. Further, we will remove your font size and font face choices and make them consistent with the rest of the plan. Underlines, italics, and bold text will be retained. If your text includes tables, the tables will be retained and will be consistently formatted by the system.

**Ensuring Accessibility**

The portal contains a pre-formatted copy of the plan — when exported to Word or PDF you will be able to see the structure. You can view export a blank Unified or Combined plan and view the [Navigation pane](https://support.office.com/en-us/article/View-and-manage-objects-by-using-the-Navigation-Pane-274DFC5A-281B-472B-94E2-EF931C5CC590) in MS Word (it’s also visible if you use the [Outline View](https://support.office.com/en-US/article/Create-a-document-outline-in-Outline-view-CFDD43C9-021F-4D5D-A678-34A182F4433C)).

The portal — as mentioned — will assign your text to appropriate places in the outline. In most cases, you will have little-to-nothing to do to make the final document accessible. If you text is accessible as is, the system will accept it. If your text is deemed too long for the answer or is otherwise not accessible, the system will alert you (see *Your Responsibilities* below). If your text includes tables, the system will convert them to use standard accessibility tags (if your tables are not accessible, the system will alert you).

The goal of the system is to provide a consistently formatted, accessible document with as little effort as possible on your part.

**Your Responsibilities to Ensure Accessibility**

While the system will assist you in creating a final accessible and uniformly-formatted output, we depend on you to provide accessible content. Here are the considerations you need to make when answer **each single question**.

**Text answers that are four pages or less**

If the answer to a single question consists of text that is roughly four pages or less (or to be precise, 12 thousand characters or less), the system will accept it. All you have to do is paste in the answer.

**Text answers that are longer than four pages**

If your answer to a single question consists of text that is more than four pages, you should ensure accessibility before you paste it in. Run Microsoft’s Accessibility Checker to ensure your text is accessible. Usually, this means assigning heading levels to your document using the built-in “Heading 1,” “Heading 2,” etc. styles. Microsoft has provided helpful documentation on accessibility, including videos and step-by-step instructions for using the built-in Accessibility Checker. Please refer to Microsoft’s [Creating accessible Word documents](https://support.office.com/en-us/article/Creating-accessible-Word-documents-D9BF3683-87AC-47EA-B91A-78DCACB3C66D) page for more information.

*NOTE*: the system will adjust your headline levels so your content appears in a logical order in the final output. For example, you may be answering a question that is tagged in the master outline as a Heading 3 answer. The content you paste in from Word should have Heading 1, Heading 2 and so on defined. The system will automatically convert your heading levels so the final outline remains logical and consistent: Your Heading 1 may become Heading 4 in the final output of this answer for example, and your Heading 2 may become Heading 5. This is expected behavior of the system.

**Answers that include a table**

If your text includes tables, you need to ensure the accessibility of the table. Don’t use merged or split cells — keep the structure of the simple and consistent (every row should have exactly the same number of cells). Also, the first row of the table — and **only** the first row — will be marked as a header row for the contents of the table.

Often people introduce accessibility issues into a table by creating two rows of headers with columns spans. The table below is an example of an inaccessible table.

| **State** | **Last Year** | **This Year** |
| --- | --- | --- |
| **Number Applied for Services** | **Number Served** | **Number Applied for Services** | **Number Served** |
| Arkansas | 5,436 | 4,832 | 6,088 | 5,412 |
| Louisiana | 6,306 | 5,605 | 7,062 | 6,278 |

This table is considered inaccessible because it uses merged rows, merged columns and two rows of headers. These present challenges to accessibility. Here is the same information presented in a way that is accessible to all.

| **State** | **Number Applied for Services Last Year** | **Number Served Last Year** | **Number Applied for Services This Year** | **Number Served This Year** |
| --- | --- | --- | --- | --- |
| Arkansas | 5,436 | 4,832 | 6,088 | 5,412 |
| Louisiana | 6,306 | 5,605 | 7,062 | 6,278 |

Microsoft provides further information on creating accessible table. See [Use simple table structure](https://support.office.com/en-us/article/Creating-accessible-Word-documents-D9BF3683-87AC-47EA-B91A-78DCACB3C66D?ui=en-US&rs=en-US&ad=US#__toc271197283).

*NOTE*: if there are no merged rows and merged columns, the system will adjust your tables automatically. It will tag the first row as the header and will make it grey. Also the contents of the cell will be adjusted: numeric information will be right-justified and textual information will be left-justified.

**Answers that include an image**

Images present special challenges to users with visual disabilities, of course. Accessibility standards do allow the use of images however if the content is adequately described so that the content of the system is fully described.

Additionally there is a technical challenge: the web portal does not (at this point) support uploading of images. However, we **can** support showing an image that you have uploaded to the web (you may need assistance from your technical folks to upload an image). Here are the criteria needed for images

* The images must exist on a web site that can be accessed from any computer on the internet (in other words, it cannot be on a local SharePoint site)
* The URL must remain stable, and your state must make a good faith effort to ensure the image remain online in that location for years to come
* You will need the assistance of someone who knows HTML programming: toggle into Basic editing mode and insert the “IMG” tag. You must include the “ALT” command. For information on use of this HTML command see <http://www.htmlquick.com/reference/tags/img.html>
* The ALT command must describe the image so that a person hearing the description would fully understand the content of the image. For example, a description such as “this images shows a bar chart of employment gains” is probably inadequate. A better description might be “this images shows that employment increased 25% in fiscal year 2015 compared with fiscal year 2014.” The goal is that the description is complete enough that a person only hearing the description would have an equivalent understand compared to a person viewing the image.

**Web portal basics**

**How to request access**

* Visit the webpage <https://rsa.ed.gov/request-access.cfm?usp=Y> (we suggest you use Internet Explorer)
* In Step 1, choose the agency to whom you report data from the dropdown list, and enter the contact information requested.
* In Step 2, select the program(s)
* In Step 3, select the ‘Grantee’ (we use the state you set in Step 1 as a filter)
* In Step 4, for each form select the access level (Read only, Edit only, or Edit and Submit)
* Step 5 will display information about what happens next.

**How to log on**

Visit <https://rsa.ed.gov/login.cfm?mode=form&usp=Y>

**How to navigate the site**

Click on *Data Entry*. You will have two sections. At the top, *Reports To Do* will list draft reports to which you have edit access.

You’ll see the main structure of the report with dropdown panels that will show details (for people using screen readers, you’ll hear the main sections as links. Click the link to open the section).

Once you open up a report panel, there will be an edit button for each major question (sometimes several questions are gathered together into one group). Click Edit on any section to edit it.

The Edit detail screen will open up. If the system expects the answer to be a narrative-type answer, it will show you a box into which to paste your answer. See *Saving your MS Word text into the portal*.

**Saving your MS Word text into the portal**

**What the portal does**

The web portal will allow you to paste your formatted MS Word text, and when saved it will convert the text into simple HTML code. It will also check the text you paste in for accessibility issues.

**RichText editing v. Basic editing**

The web portal has two modes for editing text.

* **RichText editing** allows you to paste in formatted Word text and will preserve bold, underlines, italics, tables, and so on. It will remove a lot of the font style information in order to make the final document uniform in appearance.
* **Basic editing** allows you to paste in plain text. It removes all formatting, but adds HTML code to allow for paragraph formatting.

The web portal will allow you to toggle between the modes. If you paste in text in the RichText mode and toggle to basic editing, you will be able to edit the HTML code (use this feature with caution). Be aware that the system will automatically remove unexpected and unsupported HTML commands.

**Preparing your text**

Draft your responses in MS Word and use tools such as spell check and track changes to develop a high-quality draft. When your draft is finalized, run the [Accessibility Checker](https://support.office.com/en-us/article/Creating-accessible-Word-documents-D9BF3683-87AC-47EA-B91A-78DCACB3C66D). Fix any issues encountered (MS Word will provide tips about how to fix each error, with links to online resources).

The web portal supports Heading 1 through Heading 6 — Headings 7 through 9 are not supported. Use Heading 6 instead of Headings 7 through 9.

Note: the web portal will adjust the heading levels so your outline structure will be coherent in the final document — however it may need to adjust headings down to Heading 6 if your outline uses more than 6 levels when placed into the master document. For example, if you draft an answer using Headings 1 through 4, but your answer goes into the master outline at let’s say Heading 4, the portal will adjust Heading 1 to Heading 4, Heading 2 to Heading 5, and all other headings to Heading 6.

**Special Characters**

The portal reserves use of the following characters.

| **Character** | **Name** | **What to Do** |
| --- | --- | --- |
| Tilde | Do not use this character at all; the system will remove it from your text. |  |
| > | Greater than | If you are using the RichText editor, avoid using this. If it’s absolutely necessary for your text, before you paste your text replace all “>” characters with &ldquo;>&rdquo; (without the quotes). |
| < | Less than | If you are using the RichText editor, avoid using this. If it’s absolutely necessary for your text, before you paste your text replace all “<” characters with &ldquo;<&rdquo; (without the quotes). |

**Using the RichText editor**

Open the MS in your browser (we suggest Internet Explorer) and navigate to the first question you wish to answer. If your text in MS Word is formatted (with underline or bold or italics) make sure you are using the RichText editor (there will be a button on the web site to toggle between the two editing modes).

Open your Word document and select the text you wish to copy in, and copy to your clipboard (press control+C or click on the *Edit* menu and select *Copy.* Then flip back to the web port and paste the text into the text box. You’ll see the following text box.

Press CANCEL on this box (if you choose “clean” it will actually remove your heading information, which is critical for answers longer than 4 pages).

You may click SAVE (which saves the text and remains on this page) or PREVIOUS or NEXT to navigate to another question.

**Pasting a table into the portal**

Use the RichText mode and paste in your table as you would any other Word document. You may paste a table from Word or from Excel. The portal will check for merged cells and flag them as an error. If it finds no error, it will tag the first row as the header row and will set the styles of each cell. Numeric data will be right-justified; all other cells will be left-justified.

**Advanced editing using the Basic editor**

After saving your text in the RichText editor, you may find you wish to make some tweaks to the underlying HTML code. We suggest using this \*only\* if you have some experience with HTML programming.

Toggle to the Basic editor and the system will display the HTML code that has been created from your Word document. You may edit this: but please note that we only support a small subset of HTML commands. Many HTML commands are not supported at all; and the system will automatically remove them.