



User Manual

HELP & TRAINING

Task instructions, role guidance, six read-only exercises, and a guided intake lesson.

For v12.9 workflows | Edition 1

Reviewed September 23, 2026

Use this guide alongside the demo. Search the online Help Center for a task, or use the clickable contents and PDF bookmarks to find a section.

This manual describes the demonstration. It is not a statement of customer-production readiness, office policy, or legal requirements. Follow your office's approved procedures when making program decisions.

Read-only exercises leave records unchanged. The Add a workforce client lesson saves a fictional demo record. Follow the boundaries stated in each lesson.

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Click a guide title or its page number to jump directly to that guide. You can also use the PDF bookmarks.

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Start training

Use these guides in order, or look up an individual task whenever you need help.

Workforce intake

Start with orientation, practice one intake, then learn how to maintain the client record.

1. [Exercise: take a first tour](#)
2. [Add a workforce client](#)
3. [Maintain a workforce profile and check-in](#)

Explore other workflows

These six existing exercises are read-only. They do not require saving or sending.

1. [Exercise: take a first tour](#)
2. [Exercise: review a business and renewal](#)
3. [Exercise: follow a workforce client](#)
4. [Exercise: inspect a training program](#)
5. [Exercise: run and download a report](#)
6. [Exercise: compare the two referral workflows](#)

Use [Show example](#) to view the screenshot in this PDF, then [Back to instructions](#) to return. Choose [Open online lesson](#) to read the browser guide. Its demo button opens a separate window so you can follow the instructions alongside the demo.

GETTING STARTED | Getting started

Start here: find your workspace

Choose the right portal, find your work, and use help without losing your place.

Where: TERO home and portal navigation

Access: Anyone can read help. Opening a protected workspace still requires its own sign-in.

Choose your workspace

- TERO staff portal: office work, certification, workforce, referrals, reports, and administration.
- Vendor Portal: a business manages its own profile, documents, renewal package, and inbox.
- Job Seeker and Training Portal: clients manage their workforce profile and participate in employment and training services.
- Employer portal: authorized employers manage job orders and job-related responses.
- Public website: browse certified businesses, training, resources, and solicitations without staff access.

First visit

1. Open the appropriate portal. For the staff demonstration, use the demo sign-in displayed on the staff sign-in page. Do not reuse a personal password for a shared demo identity.
2. Check your displayed role after signing in. Your role determines which actions the server allows. Seeing a section does not mean you can edit it.
3. Use the navigation menu to choose a section. On a narrow screen, use Menu.
4. Open Help & Training for the full guide, or Help with this page for the current topic. Help links from workspaces open separately, keeping your current form in place.
5. Finish or cancel any unsaved form before navigating away. Sign out when finished.

Use this guide

These instructions describe the v12.9 demo workflows. Help pages contain instructions, not live case records. A role filter recommends reading; it does not grant access. The PDF contains the same articles for offline use.

Begin with the read-only training exercises. Buttons that save, publish, approve, send, or change status are real application actions, even in a demonstration.

Related guides: [Demo boundaries, email, and backups](#) | [Understand staff roles and permissions](#) | [Read the dashboard and open follow-up work](#)

GETTING STARTED | Reference

Demo boundaries, email, and backups

Know what is safe to explore and what the demonstration does not promise.

Where: Help & Training

Access: Everyone.

Practice safely

- Use fictional examples. Do not upload real enrollment documents, identity records, employee files, or other sensitive information for a demonstration.
- Shared demo sign-ins are not individual production accounts. Other testers can use the same account and may change records.
- Do not assume every record already in the demo is safe to disclose. Do not copy unfamiliar personal details into screenshots or training materials.
- Read-only exercises do not require clicking Send, Save, Publish, Approve, or Reset. Do not send practice messages to real recipients.

Email is connected; mailbox administration is locked

The existing notifications account remains configured for application email functions. Its private mailbox administration panel is intentionally locked in the current demo, including for the owner through that panel. A staff role does not unlock it.

The lock does not disable all application email. Certain workflow actions can generate notifications. A saved record, portal message, or Sent indicator is not proof that a recipient received or read an external email. Report delivery concerns to the operator; do not reconnect or replace the account.

Dates and statuses

Sample deadlines and certification dates age with the calendar. An expired certification or passed training deadline can be expected behavior. Counts and dates in your screen may differ from screenshots.

Backups are manual

The current recovery export is a manually started, encrypted full data backup with a separate recovery key. It is not scheduled nightly. Application source is preserved separately. Backup and retention labels in Settings do not establish that automated backups are running.

The operator controls backup exports and recovery. Ordinary demo users should not change backup settings or attempt a restore. This user manual is not a disaster-recovery runbook.

Related guides: [Resolve sign-in, password, and session problems](#) | [Understand settings and operator boundaries](#) | [Exercise: take a first tour](#)

GETTING STARTED | Reference

Understand staff roles and permissions

See which roles handle certification, workforce, referrals, and administration.

Where: Staff account menu and Settings > Users & roles

Access: Role assignments are controlled by authorized administrators and directors.

Staff responsibilities

- TERO Administrator: office settings, staff administration, and program management, subject to separate operator-only protections.
- TERO Director: program oversight and staff administration subject to role hierarchy restrictions.
- Certification Staff: business profiles, certification documents, and renewals.
- Compliance Staff: certification status and compliance documents; this does not grant general business-profile editing.
- Referral/Procurement Staff: business referrals and job-order work.
- Workforce Staff: workforce profiles, job orders, and training.
- Auditor: authorized read-only records and reporting, with sensitive information restricted.
- Viewer: limited read-only access; private documents and Job Applications are restricted.

Important boundaries

Business profile edits are permitted for Administrator, Director, and Certification Staff. Certification management also permits Compliance Staff. Business referral management permits Administrator, Director, and Referral/Procurement Staff. Workforce and training management permits Administrator, Director, and Workforce Staff. Job-order editing additionally permits Referral/Procurement Staff.

Permissions can be narrower for a particular action or record. A disabled control or access-denied response is not a reason to use another person's credentials. Contact your administrator and describe the task you need to perform.

Mailbox administration has a separate owner-identity check and remains locked. Ordinary staff permissions do not override it.

Related guides: [Manage people and portal access](#) | [Resolve sign-in, password, and session problems](#)

OFFICE WORK | Reference

Read the dashboard and open follow-up work

Use attention counts and linked records to decide what needs review.

Where: Staff portal > Dashboard

Access: Staff sign-in; destination records retain their own permissions.

Daily review

1. Open Dashboard and allow the counts to finish loading. If an error appears, retry before treating a number as current.
2. Review the available program summaries and attention items. Choose an item to open its related section or record.
3. Check the record status, dates, and history before deciding whether action is needed. A badge is a prompt to review, not an approval.
4. Return to Dashboard or use the side menu to move to the next queue.

If a count seems wrong

Check filters, date ranges, and your permissions. Shared demo activity and elapsed deadlines can change counts. A dashboard visit does not establish that email reminders or inbound mailbox maintenance ran.

Related guides: [Find, edit, and publish a business](#) | [Maintain a workforce profile and check-in](#) | [Run, export, and save a report](#)

BUSINESS CERTIFICATION | Reference

Find, edit, and publish a business

Maintain business details and understand the difference between a saved profile and public visibility.

Where: Staff portal > Businesses

Access: Profile editing: Administrator, Director, Certification Staff. Other actions follow their own permissions.

Before you begin: Profile and visibility changes affect the shared demo. For training, inspect an existing fictional record without saving changes.

Find and review

1. Open Businesses. Search by the business details shown in the list. Clear the search if the expected record is missing.
2. Open a business and confirm its name and certification identifier before editing.
3. Review contact details, classification, capabilities, certification status, documents, and account information as permitted by your role.

Update a profile

1. Edit the relevant business fields, including service area and capabilities where appropriate. Keep public contact details separate from the notification contact.
2. Choose Save business profile and wait for the confirmation. Reopen the record if you need to verify the saved values.
3. Use the public-visibility control in the business list only when publication is intended. Saving a profile is not the same as publishing it.
4. Check the public directory to see what visitors can actually view. Expired or suspended certification visibility also depends on directory settings.

Add a business

1. Choose Add business. Enter the business name, type, classification, contact, and other required fields using information approved for this record.
2. Choose Create draft. Review the new record before taking certification or publication actions.

Related guides: [Review certification and renewal work](#) | [Upload and review business documents](#) | [Search the public business directory](#)

BUSINESS CERTIFICATION | Reference

Review certification and renewal work

Distinguish new intakes, renewal submissions, and certification status decisions.

Where: Staff portal > Certifications and business record

Access: Administrator, Director, Certification Staff, and Compliance Staff can manage certification; individual endpoints may apply additional rules.

Before you begin: Approval and status actions can create notices. Reading a sample renewal does not require approving it.

Review the queue

1. Open Certifications. Separate New certification intakes from Renewals and exceptions.
2. In New certification intakes, review the applicant row and its Submitted copy document downloads. This table is an intake list, not an approval button. Do not treat receipt of an application as certification approval.
3. For a renewal, choose Review or Open for the business. Confirm the business and submitted package.
4. Inspect the renewal documents and contact or business changes. Enter a clear decision note.
5. Choose Request information when evidence is missing, or Approve renewal only when the review is complete. Wait for confirmation before closing.

Record a status decision

1. Open the business record and find Certification status and resolution.
2. Choose Status. For Current, enter New expiration date. Complete Required internal decision reason.
3. Review Message to business and the checkbox Send this notice to the Vendor Portal when the status changes. Leave the checkbox unchecked if a notice is not intended.
4. For Current, choose Make Current and save. For another status, choose Save status and notice. Wait for confirmation, then verify the status and expiration shown on the business record.

Interpret expiration correctly

Current and Renewal due are not permanent labels. Once the expiration date has passed, the effective display can become Expired. Suspension and revocation remain distinct decisions. Certification status, public visibility, and portal-account status are separate.

Related guides: [Find, edit, and publish a business](#) | [Upload and review business documents](#) | [Use the Vendor Portal](#)

BUSINESS CERTIFICATION | Reference

Upload and review business documents

Keep supporting documents attached to the correct business and verify uploads.

Where: Business record or Vendor Portal > Documents

Access: Staff document uploads require certification-management permission; vendors act only on their own permitted documents.

Document handling

1. Open the intended business or your own Vendor Portal and confirm the record identity.
2. Find its document area. Review existing files before uploading a duplicate.
3. Use the upload control and select the requested document type and file. Follow the file-type and size restrictions shown on screen.
4. Wait for completion. Confirm the new file appears in the correct document list and opens successfully.
5. For a renewal, also finish the renewal submission. Uploading a file alone does not submit or approve a renewal package.

Missing access or failed upload

Viewer and Auditor cannot upload business documents. Read access is also role-dependent. If an upload fails, read the error and check the file format, size, and record before retrying. Never assume a file saved because its name appeared in the file chooser.

Private document links still require authorization. Do not use a copied link as a way to share confidential documents publicly.

Related guides: [Review certification and renewal work](#) | [Use the Vendor Portal](#) | [Understand staff roles and permissions](#)

PUBLIC SERVICES | Reference

Search the public business directory

Find businesses, check certification information, and request a referral.

Where: Certified Businesses

Access: Public browsing; submitting a request may require additional information or access.

Find a business

1. Open Certified Businesses from the public navigation.
2. Enter a business name, service, or keyword, then use the available category and business-type filters to narrow the results.
3. Open a profile and check its services, contact information, service area, and certification display.
4. If no result appears, clear filters and try a broader term. A hidden, unpublished, expired, or suspended record may not appear.

Request assistance

Use the referral-request action on the relevant business when you need TERO assistance. Review the selected business and enter accurate request details. Submitting a request starts a staff workflow; it does not award work or guarantee a response.

Directory totals describe business records, not a guarantee that every listed business is currently certified or available. Check each profile and the displayed dates.

Related guides: [Track a business referral](#) | [Find resources and complete a form](#) | [Demo boundaries, email, and backups](#)

REFERRALS AND OPPORTUNITIES | Reference

Track a business referral

Create a request, review its status, and distinguish sending from completion.

Where: Staff portal > Business Referrals

Access: Management: Administrator, Director, Referral/Procurement Staff.

Before you begin: Sending or resending can notify a real address. Training exercises stop before those actions.

Create and review

1. Open Business Referrals. Review recent requests before creating a duplicate.
2. In Create a tracked referral, select the correct business and complete the requester, organization, project, location, and details fields.
3. Choose Create submitted referral. Open the resulting entry and review its details.
4. When authorized and ready, use the available send action. Check the resulting delivery and referral status.
5. Review responses and history. Use Close referral only when the office has finished handling the request.

Status and export

Submitted, Sent, Viewed, and response statuses describe different events. Sent does not prove an email was read. Resending can create another notification; do not repeatedly resend without checking the record.

Export log downloads the referral list for follow-up. Treat exported requester details as office information. Imported mailbox bodies and delivery-history details may be hidden under the demo mailbox protections.

Related guides: [Search the public business directory](#) | [Use portal messages and profile-change review](#) | [Review and publish a solicitation](#)

WORKFORCE AND EMPLOYMENT | Reference

Maintain a workforce profile and check-in

Review registry status, availability, check-ins, and client submissions.

Where: Staff portal > Workforce

Access: Editing: Administrator, Director, Workforce Staff. Read access is restricted by role.

Review the registry

1. Open Workforce. Use Registry to search clients and filter registry status or availability.
2. Open a client and verify the identity before editing. Review contact and assignment, eligibility, education, employment history, credentials, and notes as permitted.
3. Use Work queues to find check-ins due, overdue records, and client submissions. Review the actual dates before following up.

Record a check-in

1. Open the client and choose Record check-in.
2. Enter the check-in date, contact method, current availability, and summary. Verify the calculated next check-in date.
3. Update relevant interests or skills when information has changed.
4. Choose Record check-in and verify the new entry in Check-in history.

Profile and status changes

Add workforce client creates a record; Edit complete profile updates an existing one. Review the optional portal-account creation choice before saving. A workforce record and a login account are separate.

Status and resolution controls require a reason and may deliver a client-facing notice. A manual position adjustment requires a reason. Follow the office's policy; a position or eligibility label is not a job offer.

Rules and settings affect check-in intervals and registry ordering. Do not change these for an individual client issue.

Return to training

You have reached the end of this path.

Related guides: [Review workforce authorizations](#) | [Manage people and portal access](#) | [Review and release a workforce referral](#)

WORKFORCE AND EMPLOYMENT | Reference

Review workforce authorizations

Check the client authorization record before releasing information.

Where: Staff portal > Workforce > Authorizations

Access: Workforce permissions apply; read-only roles do not gain authority to record consent.

Check authorization

1. Open Workforce and choose Authorizations, or open a client and choose Manage authorizations.
2. Select the correct client and review the authorization type, scope, status, and history displayed.
3. Check whether an authorization is current and applicable to the intended action. Do not substitute a general note for a recorded authorization.
4. To create a record, choose New authorization. Select the client, Purpose, Recipient type, Named recipient, Consent method, dates, and Exact authorized information. Use only information supported by the client's authorization.
5. For Consent method = Client portal, choose Send for client review, then find the authorization in the list and check its status. Sending for review does not mean consent is granted. For another consent method, enter Signed date and choose Record authorization. Wait for the confirmation, then reopen the record to review its dates and Authorization history.
6. For an Active authorization, select only the categories actually shared and choose Record disclosure. Verify the entry in Disclosure history. To stop future sharing where permitted, enter Required reason and choose Revoke authorization; verify the changed status and Authorization history.

Release boundaries

Client interest, an authorization record, and staff approval are different parts of a workflow. Follow the release controls for the specific referral; do not send a complete private workforce profile by email.

If the record is incomplete or an authorization has been withdrawn or expired, pause the release and ask the responsible staff member to resolve it.

Related guides: [Maintain a workforce profile and check-in](#) | [Review and release a workforce referral](#)

WORKFORCE AND EMPLOYMENT | Reference

Manage an employer record

Keep employer services, contact records, and portal users distinct.

Where: Staff portal > Employers

Access: Profile editing: Administrator, Director, Workforce Staff, Referral/Procurement Staff.
Service-status changes: Administrator, Director, Workforce Staff.

Review or update

1. Open Employers. Search by employer details and use status or organization-type filters.
2. Open a record. Check its contact information, work locations, hiring needs, linked business, job orders, and portal users.
3. If authorized, edit the required fields and choose Save employer profile.
4. For a new employer, choose Add employer, complete the required fields, and choose Add employer record.

Service status is not login status

Make employer inactive and Activate employer services change the employer's program status and require a reason. They are different from disabling a person's login.

Use Open Job Orders to manage opportunities. Use People and Portal Access to review linked users. Confirm the correct organization link before changing an account.

Related guides: [Create and review a job service order](#) | [Manage people and portal access](#) | [Use the Employer Portal](#)

ACCOUNTS AND SETTINGS | Reference

Manage people and portal access

Review linked accounts, access decisions, and session controls.

Where: Staff portal > Portal Access

Access: Available account types and actions depend on the acting staff role and hierarchy.

Before you begin: These actions affect access. Read-only training should not create users, reset passwords, change roles, or revoke sessions.

Review access

1. Open Portal Access, titled People and Portal Access. Search for the person or organization and use category/status filters.
2. Open the account. Confirm the person, role, and linked business, workforce client, or employer.
3. Read account status separately from program/access status. An active login does not automatically approve program services.
4. Choose only the action required for the task, enter the decision note where requested, and wait for confirmation.

Create or maintain an account

Add portal user offers only the account types your role can create. Select the correct linked record, enter the person's details, and review the role before Create portal account. Do not create a second account to work around an access issue.

Identity edits and record relinking change who the account represents. Verify both sides before saving. Staff role changes follow hierarchy restrictions.

Understand security actions

- Unlock account applies to a Locked account. It is not the same as Reactivate account for a disabled account.
- Revoke sessions signs out existing sessions for the account. Shared demo users may all be affected.
- Disable account blocks access; review the reason and target carefully.
- Password reset and verification are different processes. A verification link is not a password-reset link.

Related guides: [Understand staff roles and permissions](#) | [Resolve sign-in, password, and session problems](#) | [Understand settings and operator boundaries](#)

WORKFORCE AND EMPLOYMENT | Reference

Create and review a job service order

Move an employer opportunity through staff review with a documented decision.

Where: Staff portal > Job Orders

Access: Editing: Administrator, Director, Workforce Staff, Referral/Procurement Staff.

Create a draft

1. Open Job Orders and check that the intended employer already exists and is active. Use Add employer only if a new record is needed.
2. Choose New job order. Select the employer and enter job title, trade, project, openings, location, schedule, wage information, and dates.
3. Describe duties, required and preferred qualifications, licenses, equipment, and preference requirements. Keep internal TERO notes separate from employer notes.
4. Choose Create private draft. Review the saved draft before progressing it.

Review and record a decision

1. Search the order list by ID, employer, project, title, or trade; use the status filter.
2. Choose Open. Review requirements and Order history.
3. In Change job-order status, select an available status and enter the Required decision note.
4. Choose Record decision and confirm the new status. Review open orders before using them for workforce matching.

Related guides: [Manage an employer record](#) | [Review and release a workforce referral](#) | [Review job applications and follow-up](#)

WORKFORCE AND EMPLOYMENT | Reference

Review job applications and follow-up

Review submitted applications and communicate job-related decisions.

Where: Staff portal > Job Applications

Access: Viewer cannot open this section. Other actions depend on role and record access.

Review an application

1. Open Job Applications and use the available tabs and search to locate the application.
2. Open the record. Review the applicant note, submitted resume when available, and announcement as it appeared at application time.
3. Read Application history and follow-up before changing a decision or assignment.
4. If authorized, enter a job-related Shared decision note and choose the available Record decision or Assign worker action.
5. Confirm the recorded result and check the relevant follow-up.

Protect shared notes

The Shared decision note is visible to participants. Keep private eligibility, enrollment, or unrelated personal details out of it. An application, a referral, and a placement are separate records; do not treat one as proof that the others are complete.

Related guides: [Create and review a job service order](#) | [Review and release a workforce referral](#) | [Use portal messages and profile-change review](#)

REFERRALS AND OPPORTUNITIES | Reference

Review and release a workforce referral

Follow client review and controlled employer release instead of sending a complete private profile.

Where: Staff portal > Workforce Referrals

Access: Editing and release depend on workforce-referral permissions and the current state.

Before you begin: Creating, sending, releasing, and closing referrals change records and may notify participants. Training uses read-only review.

Staff-assisted workflow

1. Open Workforce Referrals and choose Staff-assisted referrals. Select an Open job service order.
2. Review candidate qualifications, availability, and any missing requirements. Matching signals help review; they are not an automatic selection decision.
3. Choose Identify candidate for the appropriate fictional example only when you intend to create a record. Enter the required selection reason and any private staff notes, then Create referral record.
4. Open the referral and review the next allowed action. Send to client review requests the client's response.
5. After the client indicates interest and requirements are satisfied, review the limited job-related profile before Release limited profile.
6. Review employer responses and Referral history. Close referral when appropriate with a clear note.

Other entry points

Possible matches provides a separate matching workspace. Client-requested referrals can require Approve for referral review, Request information, or Decline request before progressing. Available actions depend on the current state.

The employer release is limited. Do not copy private contact information, registry or preference records, or internal notes into shared messages to bypass that boundary.

Related guides: [Review workforce authorizations](#) | [Maintain a workforce profile and check-in](#) | [Create and review a job service order](#)

TRAINING | Reference

Manage programs, enrollments, and outcomes

Use the catalog, calendar, enrollment queue, and session outcomes together.

Where: Staff portal > Training

Access: Management: Administrator, Director, Workforce Staff.

Create or update a program

1. Open Training and choose Program catalog. Search for an existing program before adding one.
2. Choose New program or Edit program. Enter title, provider, category, delivery mode, location, capacity, schedule, dates, and application deadline.
3. Review prerequisites, cost, contact information, and private notes. Choose the intended status: Draft, Published, Closed, or Cancelled.
4. Choose Save program. Check the catalog and, when applicable, public calendar.

Review enrollment

1. Choose Enrollments and open a client/program entry. Review the recommendation reason, client note, and enrollment history.
2. Select an available Next status. Write the Client-facing message separately from Private staff note.
3. Choose Save status and verify the result. A recommendation or interest response is not the same as confirmed enrollment.

Calendar and outcomes

Calendar shows scheduled activity. Rosters & outcomes is the workspace for session rosters, attendance, and training outcomes. Select the relevant program/session before recording results and verify the saved entry.

Past deadlines remain visible as past deadlines. Do not change dates merely to make the demo look current. Use a valid upcoming program for any actual enrollment workflow.

Recommend training can send a recommendation to a client. Review the program, client, reason, and message before sending.

Record attendance and verified results

1. In Rosters & outcomes, choose the program and the relevant view. For attendance, select the session and participant, then enter status, hours, and any private note. Choose Save attendance.
2. For an outcome, select the participant, outcome, completion date, hours completed, and verified result note. Choose Verify outcome only after checking the supporting information.

3. For a credential, review the participant, credential name and number, issue/expiration dates, status, and certificate document before Save credential.
4. For costs, select the participant and category, then review funding source, reimbursement status, authorized amount, paid amount, and private note before Save expense. These are records, not a payment transaction.

Related guides: [Maintain a workforce profile and check-in](#) | [Use the Job Seeker and Training Portal](#) | [Exercise: inspect a training program](#)

OFFICE WORK | Reference

Use portal messages and profile-change review

Find conversations and distinguish portal communication from private mailbox access.

Where: Staff portal > Messages

Access: Sending: staff roles other than Auditor and Viewer; recipient and record access still apply.

Read and respond

1. Open Messages. Select the relevant conversation or business-message view.
2. Confirm the recipient and record. Read the existing conversation before responding.
3. For a business conversation, enter the subject and message, then use Send to vendor inbox when ready. Other conversation types use their displayed send action.
4. Confirm the message appears in the conversation. Check for an error before retrying to avoid duplicate messages.

Profile changes and privacy

The message center also provides profile-change review. Review the change and the affected record rather than assuming an unread badge always represents a new message.

Ordinary portal inboxes do not expose imported private mailbox messages. Email & notifications is a separate protected administration panel and stays locked. A portal conversation does not grant access to that mailbox.

Do not assume an external email was delivered because a portal message was saved. Follow the displayed workflow result and report delivery concerns to the operator.

Related guides: [Track a business referral](#) | [Follow up on a contact request](#) | [Demo boundaries, email, and backups](#)

REFERRALS AND OPPORTUNITIES | Reference

Review and publish a solicitation

Manage drafts, review requests, publication, and business distribution.

Where: Staff portal > RFP Board

Access: Public reading is separate from posting, staff review, and referral permissions.

Draft and review

1. Open RFP Board and select a solicitation to read its details, contact, deadlines, and attachments.
2. To prepare a posting when authorized, use Create solicitation or Submit a solicitation. Enter the relevant posting details and review the publication authorization.
3. Save draft to retain work. Submit for TERO review sends it into staff review; it is not the same as publication.
4. Authorized staff review the posting and use Request changes or Publish with the appropriate note. Verify the public result after publication.

Distribute and maintain

Refer to businesses lets authorized staff choose eligible businesses. Review recipients and the confirmation before sending separate referrals. A solicitation referral is not a contract award.

Review Public referral requests and use the available accept/decline controls as appropriate. Withdraw removes a posting from active publication according to the workflow.

A deadline marked passed is historical information, not an invitation to submit late. Review the official solicitation instructions before acting.

Related guides: [Track a business referral](#) | [Search the public business directory](#) | [Use portal messages and profile-change review](#)

OFFICE WORK | Reference

Follow up on a contact request

Read public inquiries and document whether they have been handled.

Where: Staff portal > Contact Requests

Access: Staff can read requests. Auditor and Viewer cannot mark handled or reopen.

Review and record follow-up

1. Open Contact Requests. Use the status filters and search to locate the request.
2. Open it and review the topic, message, requester information, and Activity history.
3. Record a Staff follow-up note describing the response or next step. Avoid unnecessary sensitive information.
4. Choose Mark handled after the work is complete. Use Reopen when more follow-up is needed. Verify the resulting status.

Handling is not email delivery

A handled status records office follow-up. It does not, by itself, prove a reply was emailed. Private tracked-email content and delivery details may be hidden because mailbox administration is locked.

Related guides: [Use portal messages and profile-change review](#) | [Read the dashboard and open follow-up work](#)

REPORTING | Reference

Run, export, and save a report

Choose dates, inspect results, and distinguish a saved setup from a dated result copy.

Where: Staff portal > Reports

Access: The report catalog and available data are filtered by role. Custom-report saving may be restricted.

Run a standard report

1. Open Reports and choose Standard Reports. Set From and Through, or use This month, This quarter, This year, or All dates.
2. Find a report by name or program. Choose Open report for Office Summary or an available standard/detailed report.
3. Review the date range, generated time, sections, and displayed rows. Use pagination where offered.
4. Choose Excel or PDF to download the displayed report. Keep exports within the intended audience.

Create a reusable setup

1. If available, choose Custom Report. Enter a Report name, Subject, Date basis, and dates.
2. Choose columns, filters, grouping, and sorting. Exact-value filters must match a value in the report.
3. Use Preview results to inspect the output, then Save report setup. Choose Private to me or Authorized staff as appropriate.
4. Find it under Saved Reports. Shared setups still follow the viewer's permissions.

Setup versus dated copy

A saved setup stores report choices and can run against current records. It retains its own dates. Save dated copy preserves the result of a particular run as a private snapshot; it does not update with later changes.

Deleting a saved setup or dated result copy does not delete program records. Empty results can be caused by dates, exact-match filters, or permissions. Try All dates and fewer filters before concluding records are missing.

Related guides: [Understand staff roles and permissions](#) | [Exercise: run and download a report](#)

PUBLIC SERVICES | Reference

Find resources and complete a form

Use published instructions, downloads, and supported online forms.

Where: Resources or Staff portal > Resources

Access: Public resources can be read without staff access. Private drafts and management require appropriate sign-in.

Use a resource

1. Open Resources and search or filter by scope and category. Staff can also see management status filters.
2. Open the resource and read Instructions and next steps. Review the destination and requirements before entering information.
3. For supported forms, choose Fill out online or Preview blank PDF.
4. Complete the required fields. Use Save private draft when available to retain work, or Download completed PDF to obtain the result.
5. Follow the resource's submission instructions. Downloading a completed PDF does not automatically submit it to TERO.

Manage resources

Authorized staff can use Add resource or Edit resource, review its audience and status, and Save resource. Check the public result when publishing. A draft should not be presented as a published resource.

Private saved forms belong to the signed-in account. Avoid entering real personal information when using the shared demonstration.

Related guides: [Search the public business directory](#) | [Use the Job Seeker and Training Portal](#)

ACCOUNTS AND SETTINGS | Reference

Understand settings and operator boundaries

Know which settings affect the office and which controls remain protected.

Where: Staff portal > Settings

Access: Administrative permissions apply. Mailbox administration remains separately locked.

Office settings

Settings includes organization information, directory behavior, classifications, users and roles, and operational information. Review the selected section before making changes.

Expired and suspended certification behavior controls whether those records are shown or hidden in the public directory. This does not change the underlying certification decision.

Users & Roles provides the staff directory and hierarchy. Review the account and permitted role before recording an assignment.

Protected functions

Email & notifications remains locked in this demo. Do not try to reconnect Microsoft 365 or create another notifications account to work around the lock.

Backup and retention information is not proof of a running backup schedule. The existing full data export is manual and operator-controlled. Hosting, recovery keys, and deployment are outside this user manual.

Before saving

- Confirm that the change is intended for the entire office rather than one record.
- Record the previous setting and reason through your office process.
- Use the relevant Save control and verify the result. Do not change settings as part of the read-only training exercises.

Related guides: [Understand staff roles and permissions](#) | [Manage people and portal access](#) | [Demo boundaries, email, and backups](#)

ACCOUNTS AND SETTINGS | Reference

Resolve sign-in, password, and session problems

Recognize expired sessions, locked accounts, and single-use recovery links.

Where: Your portal sign-in page

Access: Use your own authorized account or the displayed fictional demo sign-in.

Sign-in troubleshooting

1. Check that you opened the correct portal for your account type. A vendor account is not a staff account.
2. Check the username or login email and password. Avoid repeatedly guessing if the account is locked.
3. If a password-recovery option is offered, request instructions and check the account's mailbox. The request acknowledgement does not confirm whether an account exists.
4. Use the latest recovery link promptly. Password-reset links expire after 30 minutes and can be used once. Verification links serve a different purpose.
5. If access remains blocked, ask the authorized administrator to review account and program/access status. A password reset does not reactivate a disabled account.

Sessions and shared demo access

Signing out revokes sessions for that account, including other browsers using the same shared demo identity. A password change invalidates older sessions and retains a replacement for the browser performing the change.

If a previously working page asks you to sign in again, return to the correct portal and sign in. Do not discard unsaved work without checking what has already saved. Never include a password or recovery link in a support screenshot.

Describe a problem

- Give the page name and exact error text.
- State your role, the action attempted, and whether the record saved.
- Use a fictional record identifier when possible; remove personal details and credentials.
- Report the time and whether the problem repeats after signing in again.

Related guides: [Manage people and portal access](#) | [Understand staff roles and permissions](#) | [Demo boundaries, email, and backups](#)

SELF-SERVICE PORTALS | Reference

Use the Vendor Portal

Manage your own business profile, documents, renewal, and messages.

Where: Vendor Portal

Access: A vendor account linked to the correct business.

Work in your own business record

1. Open Vendor Portal and sign in using the account linked to your business. Confirm the business name at the top.
2. Use the profile area to review Public information and notification contact. Save profile when authorized changes are complete.
3. Open Documents to review or upload the required supporting files. Verify uploads in the list.
4. Open Inbox to read TERO requests and use Send reply for the selected conversation.

Submit a renewal package

1. Open Renewal when a renewal is available. Read any TERO instructions and the current submission status.
2. Confirm contact information and business changes. Upload the current renewal documents.
3. Review the attestation, then choose Submit renewal package to TERO when complete.
4. Watch the inbox and renewal status for staff review or requests for more information. Submission is not approval.

Access and privacy

Use the account's password-change control when necessary. If sign-in fails, follow the displayed help or contact authorized TERO staff. Do not use another business's account.

The vendor inbox is for portal communication. It is not a view into the private notifications mailbox.

Related guides: [Upload and review business documents](#) | [Review certification and renewal work](#) | [Resolve sign-in, password, and session problems](#)

SELF-SERVICE PORTALS | Reference

Use the Job Seeker and Training Portal

Review your profile, employment opportunities, training, and messages.

Where: Workforce > Job Seeker and Training Portal

Access: A workforce account with the required program access.

Start with your profile

1. Open the Job Seeker and Training Portal from Workforce and sign in.
2. Review your profile, availability, and any check-in or staff-requested follow-up. Submit accurate updates through the available controls.
3. Read staff messages and notices. A submitted change can require staff review before it becomes an approved registry decision.

Employment and training

Review job opportunities and the stated qualifications before applying or expressing interest. An application is not a referral release or job offer. Read shared conversations and status updates for next steps.

Review available training, deadlines, and prerequisites. Interest, recommendation, review, and enrollment are distinct statuses. Wait for the program's confirmation and instructions.

Review authorization requests carefully. Contact TERO staff if a request is unclear rather than assuming it is required for every service.

Related guides: [Manage programs, enrollments, and outcomes](#) | [Review job applications and follow-up](#) | [Find resources and complete a form](#) | [Resolve sign-in, password, and session problems](#)

SELF-SERVICE PORTALS | Reference

Use the Employer Portal

Submit job orders and follow up on job-related applications and referrals.

Where: Workforce > Employer Portal

Access: An employer account linked to the organization, with appropriate service access.

Review your organization and orders

1. Open the Employer Portal and sign in. Check the employer name, then choose Job orders.
2. Choose New job order. Enter the job, location, schedule, qualifications, wages, and deadline.
3. Choose Save draft to keep an unfinished order private. Wait for the save confirmation and check that the order appears in Job orders. When ready for staff review, choose Submit to TERO. Look for The job service order was submitted to TERO for review. Submission does not make the order Open.
4. For an order marked Draft or Needs information, choose Edit order, make the requested changes, and choose Save draft or Submit to TERO as appropriate. Other statuses show Locked while followed by the status instead of Edit order.

Respond to candidates

Choose Candidate referrals to review the limited profiles released by TERO. For a newly released candidate, Start review records that review has begun. If not selecting the candidate, enter Job-related review note and choose Not selected. Check the confirmation and updated referral status. Applications is a separate workspace.

Do not assume a candidate is hired because a referral was released. Record the appropriate response and follow the placement process shown in the portal.

An employer organization record, program service status, and individual login are different. Ask TERO staff to resolve access problems.

Related guides: [Create and review a job service order](#) | [Review and release a workforce referral](#) | [Resolve sign-in, password, and session problems](#)

TRAINING EXERCISES | Training exercise

Exercise: take a first tour

A 10-minute introduction to navigation, roles, and help.

Where: Staff portal > Dashboard

Access: Use an authorized demo role. These exercises do not require saving, sending, or approving.

Before you begin: Read-only exercise. Do not enter real information or click a save, send, publish, approve, or account-management action.

Open online exercise

Read the guide, then open the demo in a separate window.

Start this exercise

Choose Try this exercise in the demo in the online guide. Sign in if prompted. The correct staff section opens with these instructions beside it. Collapsing the panel does not close your record or clear form entries.

Use clearly fictional records. If an example record is missing or your role cannot view it, skip that inspection and read the related guide; do not create records or change permissions to complete this exercise.

Practice steps

1. If prompted, sign in using the staff demonstration sign-in shown on its page. These instructions appear after sign-in.
2. Find your displayed role and open Dashboard. Identify one attention item and the section it leads to.
3. Open Businesses, then return to Dashboard using the navigation.
4. Open Help with this page and verify that Dashboard help opens separately.
5. Find the Roles article and the Demo boundaries article.

Check your understanding

- Can you distinguish your staff role from your account name?
- Which actions would change records or send a message?
- Why does the locked mailbox panel not mean every email function is disabled?

Finish

You can identify your role, return to Dashboard, and find help for the current page.

Close any opened record or report. Leave the sample data unchanged. Completion is for your own learning; this guide does not issue a certificate or record course completion.

Next lesson

Add a workforce client

Return to training

Choose a path or exercise.

Next lesson

Exercise: review a business and renewal

Return to training

Choose a path or exercise.

Related guides: [Start here: find your workspace](#) | [Understand staff roles and permissions](#) | [Demo boundaries, email, and backups](#)

TRAINING EXERCISES | Training exercise

Exercise: review a business and renewal

Follow a business from the public directory to staff review without changing its status.

Where: Staff portal > Businesses

Access: Use an authorized demo role. These exercises do not require saving, sending, or approving.

Before you begin: Read-only exercise. Do not enter real information or click a save, send, publish, approve, or account-management action.

Open online exercise

Read the guide, then open the demo in a separate window.

Start this exercise

Choose Try this exercise in the demo in the online guide. Sign in if prompted. The correct staff section opens with these instructions beside it. Collapsing the panel does not close your record or clear form entries.

Use clearly fictional records. If an example record is missing or your role cannot view it, skip that inspection and read the related guide; do not create records or change permissions to complete this exercise.

Practice steps

1. Choose a clearly fictional business in Businesses and note its name.
2. Open its record. Locate the certification status and expiration date.
3. Look for supporting documents and any renewal submission. If none is present, note that rather than creating one.
4. Open the public directory separately and search for the same business. If absent, consider publication and visibility settings.
5. Open Certifications and identify the difference between new intakes and renewals.

Check your understanding

- Is a saved profile necessarily public? No.
- Does a submitted renewal mean approval? No.
- Can a stored Current label override an elapsed expiration date? No; the effective display accounts for expiration.

Finish

You can locate a business's certification status and expiration, and explain why it may be absent from the public directory.

Close any opened record or report. Leave the sample data unchanged. Completion is for your own learning; this guide does not issue a certificate or record course completion.

Next lesson

Exercise: follow a workforce client

Return to training

Choose a path or exercise.

Related guides: [Find, edit, and publish a business](#) | [Review certification and renewal work](#) | [Search the public business directory](#)

TRAINING EXERCISES | Training exercise

Exercise: follow a workforce client

Read availability, check-in history, and referral boundaries.

Where: Staff portal > Workforce

Access: Use an authorized demo role. These exercises do not require saving, sending, or approving.

Before you begin: Read-only exercise. Do not enter real information or click a save, send, publish, approve, or account-management action.

Open online exercise

Read the guide, then open the demo in a separate window.

Start this exercise

Choose Try this exercise in the demo in the online guide. Sign in if prompted. The correct staff section opens with these instructions beside it. Collapsing the panel does not close your record or clear form entries.

Use clearly fictional records. If an example record is missing or your role cannot view it, skip that inspection and read the related guide; do not create records or change permissions to complete this exercise.

Practice steps

1. Open Workforce and select a clearly fictional client.
2. Find registry status, availability, and check-in history. Compare the next check-in date with today.
3. Review the authorization area if your role permits it; do not record or change consent.
4. Open Workforce Referrals and review an existing referral if one is available.
5. Locate the distinction between client review and employer release.

Check your understanding

- Are availability and eligibility the same? No.
- Does a match automatically authorize employer release? No.
- Should private staff notes be copied into a shared message? No.

Finish

You can distinguish registry status, availability, consent, and referral release without changing a client record.

Close any opened record or report. Leave the sample data unchanged. Completion is for your own learning; this guide does not issue a certificate or record course completion.

Next lesson

Exercise: inspect a training program

Return to training

Choose a path or exercise.

Related guides: [Maintain a workforce profile and check-in](#) | [Review workforce authorizations](#) | [Review and release a workforce referral](#)

TRAINING EXERCISES | Training exercise

Exercise: inspect a training program

Connect program dates, enrollment, and outcomes.

Where: Staff portal > Training

Access: Use an authorized demo role. These exercises do not require saving, sending, or approving.

Before you begin: Read-only exercise. Do not enter real information or click a save, send, publish, approve, or account-management action.

Open online exercise

Read the guide, then open the demo in a separate window.

Start this exercise

Choose Try this exercise in the demo in the online guide. Sign in if prompted. The correct staff section opens with these instructions beside it. Collapsing the panel does not close your record or clear form entries.

Use clearly fictional records. If an example record is missing or your role cannot view it, skip that inspection and read the related guide; do not create records or change permissions to complete this exercise.

Practice steps

1. In Training, open Program catalog and choose an existing fictional program.
2. Read its status, provider, dates, deadline, capacity, and prerequisites.
3. Open Calendar and find the program if it has scheduled activity.
4. Open Enrollments and inspect an entry if one exists. Read its status and history.
5. Open Rosters & outcomes and review the available program/session selectors without recording attendance.

Check your understanding

- Is an Interested status a confirmed enrollment? No.
- Can a program remain visible after its deadline? Yes; read the date and status.
- Which workspace contains attendance and outcomes? Rosters & outcomes.

Finish

You can find a program, identify its deadline, and distinguish interest from confirmed enrollment.

Close any opened record or report. Leave the sample data unchanged. Completion is for your own learning; this guide does not issue a certificate or record course completion.

Next lesson

Exercise: run and download a report

Return to training

Choose a path or exercise.

Related guides: [Manage programs, enrollments, and outcomes](#) | [Use the Job Seeker and Training Portal](#)

TRAINING EXERCISES | Training exercise

Exercise: run and download a report

Preview a report and export it without altering program records.

Where: Staff portal > Reports

Access: Use an authorized demo role. These exercises do not require saving, sending, or approving.

Before you begin: Read-only exercise. Do not enter real information or click a save, send, publish, approve, or account-management action.

Open online exercise

Read the guide, then open the demo in a separate window.

Start this exercise

Choose Try this exercise in the demo in the online guide. Sign in if prompted. The correct staff section opens with these instructions beside it. Collapsing the panel does not close your record or clear form entries.

Use clearly fictional records. If an example record is missing or your role cannot view it, skip that inspection and read the related guide; do not create records or change permissions to complete this exercise.

Practice steps

1. Open Reports. Choose All dates to avoid excluding older fictional activity.
2. Choose an available standard report and select Open report.
3. Read the date range, generated time, and row counts. Page through results when offered.
4. Download PDF or Excel if you need an offline example. Keep the file private if it contains any non-fictional details.
5. Close the preview. Read the explanation of saved setups and dated copies without saving one.

Check your understanding

- Does exporting change program records? No.
- Does a dated copy refresh itself? No.
- Can a shared report setup override your permissions? No.

Finish

You can open a report, explain its date range, and distinguish an export from a saved report setup.

Close any opened record or report. Leave the sample data unchanged. Completion is for your own learning; this guide does not issue a certificate or record course completion.

Next lesson

Exercise: compare the two referral workflows

Return to training

Choose a path or exercise.

Related guides: [Run, export, and save a report](#) | [Understand staff roles and permissions](#)

TRAINING EXERCISES | Training exercise

Exercise: compare the two referral workflows

Tell business referrals apart from workforce referrals.

Where: Staff portal > Business Referrals

Access: Use an authorized demo role. These exercises do not require saving, sending, or approving.

Before you begin: Read-only exercise. Do not enter real information or click a save, send, publish, approve, or account-management action.

Open online exercise

Read the guide, then open the demo in a separate window.

Start this exercise

Choose Try this exercise in the demo in the online guide. Sign in if prompted. The correct staff section opens with these instructions beside it. Collapsing the panel does not close your record or clear form entries.

Use clearly fictional records. If an example record is missing or your role cannot view it, skip that inspection and read the related guide; do not create records or change permissions to complete this exercise.

Practice steps

1. Open Business Referrals and inspect an existing fictional request. Identify the requester, selected business, project, and status.
2. Read the history without sending or resending.
3. Open Workforce Referrals and inspect an existing fictional referral if permitted.
4. Identify the client, job order, client response, and employer release stage.
5. Explain which workflow you would use to request a contractor and which to refer a job seeker.

Check your understanding

- Business referrals connect requests with businesses.
- Workforce referrals connect clients with job orders through review and controlled release.
- Neither workflow itself guarantees a contract award or a hire.

Finish

You can explain when to use a business referral versus a workforce referral and identify the stages of each.

Close any opened record or report. Leave the sample data unchanged. Completion is for your own learning; this guide does not issue a certificate or record course completion.

Return to training

You have reached the end of this path.

Related guides: [Track a business referral](#) | [Review and release a workforce referral](#) | [Create and review a job service order](#)

WORKFORCE | Hands-on lesson

Add a workforce client

Practice a fictional workforce intake with the instructions beside the form.

Where: Staff portal > Workforce > Add workforce client

Access: A signed-in staff role with workforce editing permission. Read-only users can study the guide and example.

Before you begin: This task saves a shared demo record. Use fictional information only. Leave contact details blank and defer portal-account setup. Closing the instructions does not clear the form; Cancel does.

Show example

View the intake screenshot inside this PDF.

Open online lesson

Read the guide, then open the demo in a separate window.

Your goal

Create one clearly labeled fictional client, then find that client in the Workforce registry. Allow about five minutes.

For this exercise, use Start practice intake. It opens the form with portal-account creation unchecked. The ordinary Add workforce client button uses normal intake defaults and starts with portal-account creation checked. Both buttons use the same real form; neither creates a separate practice database.

Follow these steps

1. Open Workforce and search for your practice client first to avoid duplicates. Choose Start practice intake in the lesson panel.
2. Leave Create the client's portal account with this registration unchecked. If you used the ordinary Add workforce client button, uncheck it before continuing. Portal setup is deferred appears and the login email and temporary-password fields disappear.
3. Enter Practice as the first name. For the last name, use Training followed by your initials and a short unique number. Leave phone, email, street address, and enrollment reference blank.
4. Keep Registry status as Registered. In Registry status reason and Internal staff notes, enter Fictional training record. Leave the remaining practice defaults as shown.

5. Review the form, then select Save workforce profile once. Wait for the save confirmation. If an error appears, correct the indicated field and retry; your entries remain in the form.
6. Close the profile if it opened, then search the registry for the exact practice name. Confirm the client is listed as Registered. Do not create another record to repeat this check.

Check your result

The saved practice name appears in the registry and its profile opens. Registered does not mean eligible for referral. This lesson does not change eligibility, create a portal account, or ask you to send a message.

If you do not want to save, choose Cancel. A saved practice record remains in the shared demo; there is no automatic cleanup or completion certificate.

If you get stuck

- No Start practice intake button: wait for Workforce to load. If your role is read-only, use Show example or ask the administrator for the appropriate access.
- A required-field message: complete the indicated field. If login email or password is requested, check that portal-account creation is unchecked.
- Could not save or load: keep your entries, check the error, and retry only after the problem is resolved. Search for the practice name before starting over.

Next lesson

Maintain a workforce profile and check-in

Return to training

Choose a path or exercise.

Related guides: [Maintain a workforce profile and check-in](#) | [Exercise: take a first tour](#) | [Demo boundaries, email, and backups](#)

Example: Add a workforce client

Back to instructions

Return to the Add a workforce client lesson in this PDF.

NEW PRIVATE WORKFORCE INTAKE

Add a workforce client

Collect employment-service information only. Do not enter Social Security numbers, medical records, criminal-history reports, or financial investigation data.

CLIENT PORTAL ACCESS

☐ Create the client's portal account with this registration
Portal setup is deferred. You can finish it later from the client's profile without another application.

IDENTITY AND CONTACT

FIRST NAME	MIDDLE NAME	LAST NAME	PREFERRED NAME
Practice		Training AB01	
PHONE	EMAIL	STREET ADDRESS	
CITY	STATE	POSTAL CODE	
North River	WA		

PREFERENCE AND REGISTRY

PREFERENCE CATEGORY	TRIBAL AFFILIATION	ENROLLMENT REFERENCE	REGISTRATION DATE
Hokoli member	Hokoli Confederated Tribes		09/23/2026

Example: the intake form with portal setup deferred. The form continues below with registry and employment fields.

Fictional example only. Use your own unique practice name. The screenshot shows the top of the form; scroll in TERO Tracks for the remaining fields.