



WIOA Services

Why, How, When

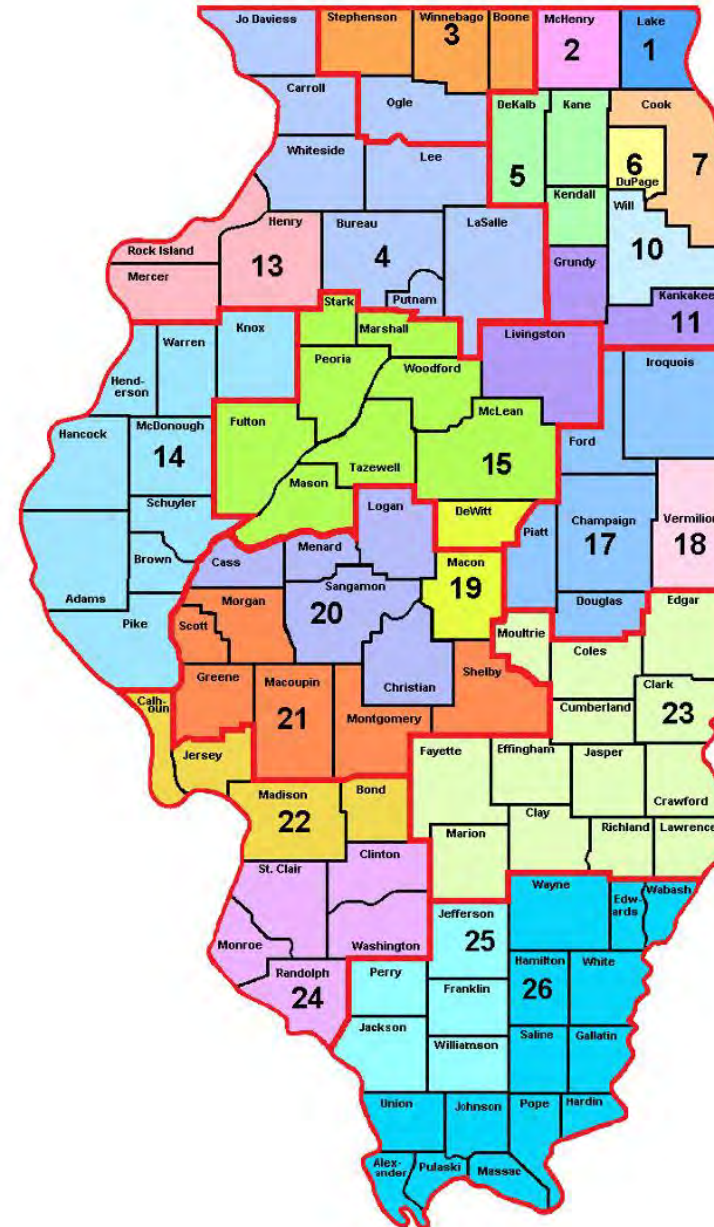
March 31st, 2021



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Where is Your Local Area?



Which partner do you best represent?





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Objective

- The primary objective of this presentation is to discuss the various types of Workforce Innovation and Opportunity Act (WIOA) services and discuss the importance of the plan supporting enrollment in services.
- Secondarily, this presentation will demonstrate how services are recorded in the Illinois Workforce Development System (IWDS).
- Lastly, recording and closing services in a timely manner will be discussed and demonstrated.

Processes Around Services

- This training will be more about the processes related to recording services, stressing the importance of the timeliness of recording services, and details about the internal logic within IWDS related to services.
- For this session, we will not be going over all the formal descriptions/definitions of the various services.
- The DCEO Office of Employment and Training (OET) Policy Unit will be issuing a new services policy that will include the descriptions/definitions of the various WIOA services soon.

Federal Guidance

- Workforce Innovation and Opportunity Act of 2014 is the overall driving factor for all the WIOA programs.
- Training and Employment Guidance Letter (TEGL) 10-16, Change 1 – Performance Accountability Guidance for WIOA – dated August 23rd, 2017
- TEGL 14-18 – Aligning Performance Accountability Reporting Definitions and Policies Across Workforce Employment and Training Programs Administered by DOL – dated March 25th, 2019
- TEGL 19-16 – Guidance on Services Provided through Adult and Dislocated Worker under WIOA – dated March 1st, 2017.
- TEGL 21-16 – Third WIOA Title I Youth Formula Program Guidance – dated March 2nd, 2017.

Understanding the ePolicy Manual

The Illinois Department of Commerce and Economic Opportunity, Office of Employment and Training (OET) utilizes a WIOA ePolicy portal where all current and new guidance issued by the Illinois Workforce Innovation Board (IWIB) and OET will be maintained.

Homepage: www.illinoisworknet.com/DCEOPolicies



State Guidance Used/Referenced in this Presentation

DCEO Office of Employment & Training (OET) ePolicy Chapter 4 – Service Delivery:

- Section 2.3 – Career Planning – this policy will be coming out soon (I have referenced information in this presentation from the “Draft” version of this Policy.)
- Section 2.4 - Follow-Up Services – effective 6/18/2020
- Section 2.4.1 – Adult and Dislocated Workers Programs Follow-Up Services – effective 6/12/2020
- Section 2.4.2 – Youth Program Follow-Up Services – effective 6/12/2020
- Section 3 – Programmatic Reporting Requirements – effective 10/9/2013 (Note, this guidance will be rescinded when the new Career Planning Policy Section 2.3 is issued.)
- OET Notice NO. 19-NOT-01 – Basic Skills Deficient, Change 4 – dated 3/15/2021



WIOA Career Services

Career Services provided under WIOA Title I for Adult and Dislocated Worker clients are broken down into three subsets:

1. Basic Career Services
2. Individualized Career Services
3. Follow-up Services

Basic Career Services

- **Basic Career Services:** – may be provided before a clients' eligibility has been certified.
 - Provided with minimal staff-assistance;
 - Include 'self-service' or information only activities;
 - Examples of 'Basic Career Services' may include, but are not limited to, self-services a client might receive at an American Job Center; initial assessment testing, provision of performance information; provision of labor market information (LMI)(job listings and local demand occupations)...
- Basic Career Services = Local Services in IWDS

NOTE: Even an eligibility determination within IWDS is considered a Basic Career Service.



Individualized Career Services

- **Individualized Career Services:** are provided when an individual has been determined eligible and certified as a WIOA “participant” in either the Adult or Dislocated Worker program.
 - Requires significant staff involvement and meaningful assistance;
 - Examples of Individualized Career Services include but are not limited to the various services we associate with Career Services such as Career Planning (Case Management); Development of an IEP, Workforce Preparation Activities.

Follow-Up Services

- **Follow-Up Services:** are broken out as separate Career Services within the Federal Guidance.
 - Within IWIDS, follow-up services can only be opened after all WIOA Services have been completed, and no other WIOA Services are planned.
 - Additional information about Follow-Up Services will be presented later in this presentation.



WIOA Training Services

Under WIOA Title IB, before an Adult or a Dislocated Worker could receive WIOA funded training services, the client must have a complete assessment and the Individual Employment Plan (IEP) must be developed:

- Per WIOA legislative guidance, a participant is not **required** to have Career Services before receiving Training Services; however, understanding components related to a client's assessment are Career Services. Within IWDS the service of Development of an IEP is required before a participant can be enrolled in Training Services, therefore an Adult and/or Dislocated Worker client will need Career Services before enrollment in Training Services.



Individual Employment Plan (IEP)

An IEP is developed by the Participant and the Career Planner to identify the participant's employment goal, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goal, including providing information on eligible providers of training services and career pathways to attain career objectives.



WIOA Disaster Recovery Services

- **Disaster Recovery Services:** are separate service levels that are associated with National Dislocated Worker Grant (DWG) programs.
 - National Dislocated Worker Grants are typically awarded when there is a major disaster or crisis; many of the grants associated with COVID-19 are DWG; other current examples of DWGs are Opioid Crisis' grants. Flood or other natural disaster grants are also often DWGs.
 - Additional PowerPoint presentations that are specifically detailed to various DWGs awarded in Illinois are available, please reach out to your OET DWG grant manager if you are not familiar with these presentations.



WIOA Youth Services

WIOA Title IB Youth participant services/activities are tied to 14 youth program elements:

1. Tutoring, study skills training, instruction and dropout prevention;
2. Alternative secondary school services or dropout recovery services;
3. Paid and unpaid work experience;
4. Occupational skills training;
5. Education offered concurrently with workforce preparation and training for a specific occupation;
6. Leadership development opportunities;
7. Supportive services;
8. Adult mentoring;
9. Follow-up services;
10. Comprehensive guidance and counseling;
11. Financial literacy education;
12. Entrepreneurial skills training;
13. Services that provide labor market information;
14. Postsecondary preparation and transition activities.



WIOA Youth Services

Within IWDS, all Youth Program Elements and associated services/activities are recorded under one service level titled: **Youth Service Elements: Education/Training/Career** – under this level are the various individual activities that a Youth participant might receive.

Youth Assessment Requirements

- Prior to enrollment, WIOA guidance requires each Youth must have an objective assessment of academic levels, skill levels, and service needs of each participant, which includes a review of basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs, and developmental needs. The assessments must also consider a youth's strengths rather than just focusing on areas that need improvement.
- Using the information gleaned from the assessment, the Career Planner and the participant develop the participant's Individual Service Strategy to support enrollment and the services planned under the WIOA Youth program.

Individual Service Strategy (ISS)

- An ISS is an agreement of skills and goals decided between the WIOA Youth participant and WIOA Youth Career Planner that sets out a plan for the participant to make progress towards his/her educational and employment goals.
- Within IWDS there is an activity of an ‘Individual Service Strategy’. Since WIOA legislation requires that all Youth must have their ISS created prior to enrollment in WIOA, technically the ‘Individual Service Strategy’ service should be the first service/activity recorded on a Youth’s IWDS record after the participant is certified as eligible under the WIOA Youth title.

Recording Services

Recording services within IWDS.

- ‘Local Services’, as mentioned earlier, are considered ‘Basic Career Services’ and do not require an individual to complete a WIOA application or to have their WIOA eligibility determined to receive or record these services.
 - At a minimum, an individual must have a basic ‘Customer’ level record in IWDS in order to record Local Services.
 - Without doing that, local areas would not be able to receive credit under local, State and Federal reporting for the local services an individual might receive.

Recording Local Services

- Local services are tracked at the local and state level via Resource Room reports.
- The local services are reported as part of WIOA Federal reporting on a quarterly and annual basis.
 - It is important that if individuals are using the American Job Centers for self services, that the local services that are being provided get recorded to the individual participant receiving the services.
 - If not, then it could lead to the appearance that there is much less use within our American Job Centers.

Recording Local Services

- On the left rail of a customer level record within an IWDS when 'Add Local Services' is clicked on, it will bring up the various Local Services that are available to be recorded.
- Each LWIA can tailor the local services they would like available for selection.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. The top navigation bar is red and contains the IWDS logo, the text 'Illinois Workforce Development System', and 'Case Management'. The left sidebar is blue and contains several menu sections: 'Menus' (with sub-items 'Staff Menu' and 'Customer Menu'), 'Case Notes' (with sub-items 'Add Case Notes' and 'List Case Notes'), 'Universal Services' (with sub-items 'Add Local Service' and 'List All Services'), and 'FAQs' (with sub-item 'I'm Done: Log Off'). A red arrow points to the 'Add Local Service' link. The main content area is white and features a 'Customer Menu' section with a 'WIOA Services' link. Below this are three sub-sections: 'Customer Profile' (with links for Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials List, Participant Periods, and Generate Swipe Card), 'Applications' (with link for List Applications), and 'Referrals' (with links for Add Referral and List Referrals). At the bottom right, there is a 'Reports' section with links for Customer Info Report and View Wages.

Recording Local Services

- Each American Job Center chooses how they record the various 'Local Services' that an individual receives.
- The staff at the Center can record the information based on feedback from the individual. Or, in some cases the individual who has access to their own 'Customer Level' information using the swipe card could record the 'Local Services' they have received.

Add Local Services
WIOA Services
SSN: 2398

LWA: 20 - Land of Lincoln Workforce Alliance

<input type="checkbox"/> Assistance Establishing Eligibility for Financial Aid/FASFA	<input type="checkbox"/> Assistance Establishing Non-WIOA Eligibility
<input type="checkbox"/> Employability Development Plan	<input type="checkbox"/> Illinois workNet Usage
<input type="checkbox"/> Initial Assessment	<input type="checkbox"/> Intake
<input type="checkbox"/> Internet Usage	<input type="checkbox"/> Job Finding Club
<input type="checkbox"/> Labor Exchange Services	<input type="checkbox"/> Labor Market Information
<input type="checkbox"/> One-Stop Information	<input type="checkbox"/> Orientation
<input type="checkbox"/> Outreach Activity	<input type="checkbox"/> Performance Information for the Local Area as a whole
<input type="checkbox"/> Program Coordination and Referral	<input type="checkbox"/> Provider Performance Data
<input type="checkbox"/> Resource Center	<input type="checkbox"/> Self-Accessed Job Listings
<input type="checkbox"/> Support Service Information/Referral	<input type="checkbox"/> Talent Assessment - Test
<input type="checkbox"/> Talent Referrals	<input type="checkbox"/> UI Filing Information
<input type="checkbox"/> UI Profiling	<input type="checkbox"/> Visit with Career Planner/General
<input type="checkbox"/> <u>Workshops</u>	

Recording Local Services

- The local services obtained are indicated by marking in the box.
- Once the 'Save' button is clicked, those services are attached to the individual's electronic record and will be credited towards the participant, the center, and the LWIA where the record was created.
- As mentioned, there are resource room reports under the reporting menu in IWDS that can be run of local services by LWIA and Center.

Add Local Services
WIOA Services
SSN: 2398

LWA: 20 - Land of Lincoln Workforce Alliance

<input type="checkbox"/> Assistance Establishing Eligibility for Financial Aid/FASFA	<input type="checkbox"/> Assistance Establishing Non-WIOA Eligibility
<input type="checkbox"/> Employability Development Plan	<input checked="" type="checkbox"/> Illinois workNet Usage
<input type="checkbox"/> Initial Assessment	<input type="checkbox"/> Intake
<input checked="" type="checkbox"/> Internet Usage	<input type="checkbox"/> Job Finding Club
<input type="checkbox"/> Labor Exchange Services	<input checked="" type="checkbox"/> Labor Market Information
<input type="checkbox"/> One-Stop Information	<input type="checkbox"/> Orientation
<input type="checkbox"/> Outreach Activity	<input type="checkbox"/> Performance Information for the Local Area as a whole
<input type="checkbox"/> Program Coordination and Referral	<input type="checkbox"/> Provider Performance Data
<input checked="" type="checkbox"/> Resource Center	<input type="checkbox"/> Self-Accessed Job Listings
<input type="checkbox"/> Support Service Information/Referral	<input type="checkbox"/> Talent Assessment - Test
<input type="checkbox"/> Talent Referrals	<input type="checkbox"/> UI Filing Information
<input type="checkbox"/> UI Profiling	<input type="checkbox"/> Visit with Career Planner/General
<input type="checkbox"/> Workshops	

Viewing Local Services

- Once the local services are saved, the record goes back to the 'Customer Menu'.
- To view all Local Services an individual has received, click on 'List All Services' and the recorded services will be displayed.
- The local services can only be recorded through the local services screen on the previous slide.

The screenshot displays the IWDS Case Management interface. At the top, a red header contains the IWDS logo and the text 'Illinois Workforce Development System Case Management'. Below the header, a yellow informational message box states: 'Informational Message: 4 local service(s) added for customer.' The main content area is divided into several sections: 'Customer Menu' with a sub-link for 'WIOA Services'; 'Customer Profile' with links for 'Contact Information', 'Additional Contacts', 'Private Information', 'Veterans Information', 'Employment History', 'Credentials List', 'Participant Periods', and 'Generate Swipe Card'; 'Referrals' with links for 'Add Referral' and 'List Referrals'; and 'Reports' with links for 'Customer Info Report' and 'View Wages'. On the left side, a blue sidebar menu contains categories: 'Menus' (Staff Menu, Customer Menu), 'Case Notes' (Add Case Notes, List Case Notes), 'Universal Services' (Add Local Service, List All Services), and 'FAQs' (I'm Done: Log Off). A red arrow points to the 'List All Services' link in the 'Universal Services' section.

Viewing Local Services

- There is internal logic in IWDS that does not allow the same local service to be recorded for the same individual more than once each day.
- As an example, if an individual is using the resource center in the morning, goes to lunch and comes back in the afternoon, that individual could not record the same 'Resource Room Usage – Resource Center' local service in the afternoon.

Services

[WIOA Services](#)

SSN: 2398

Printable Services

Return

4 found

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Start Date	End Date	Service Provided	Status	Created By
03/08/2021	03/08/2021	Illinois workNet Usage - Illinois workNet Usage	Successful Completion	Jim Potts (DWG)
03/08/2021	03/08/2021	Internet Usage - Internet Usage	Successful Completion	Jim Potts (DWG)
03/08/2021	03/08/2021	Labor Market Information - Labor Market Information	Successful Completion	Jim Potts (DWG)
03/08/2021	03/08/2021	Resource Room Usage - Resource Center	Successful Completion	Jim Potts (DWG)

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Printable Services

Return



Enrolling a Client in Services

- We will now move into demonstrating recording the Individualized Career services in IWDS.
- For any Adult or Dislocated Worker to have an Individualized Career Service recorded, the participant must have their WIOA application completed, and they must be certified in one or more of the Adult and/or Dislocated Worker titles.

Note: An important detail, if an Adult participant meets the priority of either Adult Low Income and/or Adult – Basic Skills Deficient, they should have their IWDS eligibility certified under the appropriate priority(s).

Demonstrating Enrollment in Services

The example below met both the Adult Priority of Low Income and Basic Skills Deficient (BSD), so the participant has been certified under both Adult priorities for Career Services.

Eligibility Determination
[WIOA Services](#) [Application Summary](#)
 SSN: 2398 App LWA:20

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1A - Adult BSD Career Services	03/08/2021	03/08/2021
Documentation	Criteria	Yes	1A - Adult Low Income Career Services	03/08/2021	03/08/2021

* **Application Date:** 03/08/2021
 * **Eligibility Determination Date:**

Timeliness of Recording Services

- OET WIOA ePolicy Chapter 4 Section 2.3 – Career Planning Policy will provide specific direction that all services and activities must be documented in IWDS (or any other approved Management Information System) within ten (10) calendar days of the service delivery.
- This guidance will also state that service records must be closed/ended with an indication of completion status (successful or unsuccessful) within ten (10) days of learning of the completion of the service through regular thirty (30) day contact.

Allowable Services

- Various services are available for both the Adult and Dislocated Worker title; however, not all grants are set-up to fund every service.
- The individual who is assigned overall responsibility of the various grants at the LWIA or OET staff when a State-wide Grant is awarded to an agency other than an LWIA, would typically determine what services are allowable and could be funded.
- Often, local policies and guidance such as a Local Supportive Service Policy might dictate the services that are available for participants at a LWIA or for a specific grant.

Provider/Entity Relationships in IWDS

- Another point for consideration, whomever at the LWIA (typically the Local Systems Administrator) who has the responsibility to tie the services that can be funded for the various titles to a grant will also need to set up a provider/entity relationship that allows those services to be provided by a particular service provider.
- For State-wide Grants, the grantee will work with the DCEO OET grant manager assigned, who will coordinate with the OET Reporting Unit to set-up the Provider/Entity Relationships under LWIA 90 within IWDS.
- If for some reason the grant is not allowing a particular service that should be available, contact the individual responsible for setting up the IWDS Provider/Entity Relationships for your LWIA/agency.

Selecting the Title of the Service

- When enrolling in services, the Career Planner must pick a title that will fund the service.
- When enrolling a client in a service, a red asterisks (*) means there must be a response in that block before the service can be saved.
- When enrolling a participant, only the title(s) for which the participant has had their eligibility certified are eligible to be selected.
- This example participant has only been certified under the Adult title, so only the 1A title was available to select.

Select Title

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

*Title: 1A ▼

< Back Next >

Cancel

Career Services in IWDS

- Each local area chooses the various Career Services that might be available.
- If a particular service is not listed as an option, reach out to the individual at your LWIA who has the responsibility of establishing and maintaining the various Provider/Entity Relationships within IWDS. (This is typically the Local Systems Administrator at the LWIA.)
- If the grant is a State-wide grant and a particular service is not appearing, reach out to the OET grant manager.

Select Activity

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

Title: 1A
Service Level: Career Services

* Activity: **Adult Basic Education (ABE) (Developmental Education)**

Start Date: Assistance Establishing Eligibility for Financial Aid/FAFSA(staff-assisted)
Career Planning (Case Management)
Comprehensive and Specialized Assessment
Development of an IEP
English Language Education
Federal Job Referral and Placement Services
Financial Literacy Services
Follow-up Services
Group Workforce Research/Workshops/Job Club
Job Search Activities & Assistance (STAFF)
Out-of-Area Job Search/Relocation Assistance
Referred to Employment/Placement Assistance (STAFF ASSISTED)
Short Term Prevocational Services (Job Readiness)
SS - Child Dependent Care
SS - Healthcare
SS - Housing Assistance
SS - Other Supportive Services
SS - Tools/Equipment
SS - Transportation
SS - Uniforms
Training Paid by Non-WIOA TITLE I Funds
UI Filing Information (staff-assisted)
Workforce Preparation Activities
WBL - Job Shadowing
WBL - Paid WEX/Internship (Not Limited to Summer Months)
WBL - Pre-Apprenticeship Program
WBL - Transitional Jobs
WBL - Unpaid WEX/Internship (Not limited to Summer Months)
X - Holding

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Same Day Services in IWDS

- Many services in IWDS are considered Same Day Services, meaning the service must be closed on the same date the service was recorded.
- Within IWDS services screen, same day services are indicated by the **red** text next to the name of the Activity where it states, '**Same Day Service**' as shown in the example below:

Add Required Activity Information

[WIOA Services](#) [Application Summary](#)

SSN: 2398 **App LWA:** 20 **App Date:** 03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Career Services
Activity: Development of an IEP **Same Day Service** ←

Timeliness of Closing Services

- An important distinction about all services, a service **should not** be left open if the service is not currently being provided.
- Meaning, just because a service is not labeled as a Same Day Service, does not mean it should be left open when the service is not currently being provided.
- A participant's Services screen should provide an accurate at-a-glance snapshot of what is going on with the participant, and the case notes should be used to tie together the entire picture.

Demonstrating Recording a Service

- Career Planning (Case Management) is a service/activity that has a very broad definition and could encompass much of the two-way communication between a participant and Career Planner.
- Often the “Grant” might auto populate. Verify and make sure it is the correct grant to fund the service.
- To identify the correct provider, click the “Search Providers” button within the service.
- The Provider for this service is typically the American Job Center/Illinois workNet Center (IwN) where the Career Planner works.

Add Required Activity Information
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Career Services
Activity: Career Planning (Case Management) **Same Day Service**
*Grant: 19681020-Land of Lincoln Workforce Alliance
Provider: * Search Providers
Start Date: 03/08/2021
End Date:
*Current Status: Open
Comments:

Choosing a Provider

- On the Search Provider Relationships screen click “Show All” and this will bring up the various Provider Relationships that have been set-up for the title.
- You can enter a name or a relationship number however, the system looks for exact matches so typically the “Show All” button will provide much better results when searching for a particular provider.

Search Provider Relationships

←

Provider Relationship Name:

Relationship Number: -

Statutory Program: WIOA
Title: 1A
Service Level: Career Services
Activity: Career Planning (Case Management)
Start Date: 03/08/2021

Choosing a Service Provider

- If the provider is not listed on the first page, click “Next Page” for additional providers.
- If the desired provider can’t be found, contact the individual within the LWIA who is tasked with setting up the Provider/Entity Relationships (typically the Local Systems Administrator).
- Once the ‘Provider’ for the activity/service being recorded is identified, click ‘Pick’ to select the correct Provider.

List Provider Relationships

[Return To Search](#)

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	Provider Name	Relationship ID	Relationship Type
Pick	Heartland Community College	2080-00	Vendor
Pick	Illinois workNet Center	Testing20-20	Contract
Pick	Land of Lincoln Workforce Alliance	2109-00	Contract

Page 1 of 2 [Next Page >](#)

List Provider Relationships

[Return To Search](#)

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	Provider Name	Relationship ID	Relationship Type
Pick	Lincoln Land Community College	2150-00	Vendor

Page 2 of 2 [< Prev Page](#)

[Return To Search](#)

Enrolling in a Service

- This example service is a Same Day Service, it will need to have an end date populated that matches the start date.
- Career Planners will be required to record the 'Current Status:' with choices of Open, Successful Completion or Unsuccessful Completion.
 - Open is not an option for any same day service.
 - Typically, a same day service should have a status of 'Successful'.

Add Required Activity Information
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Career Services
Activity: Career Planning (Case Management) **Same Day Service**
*Grant: 19681020-Land of Lincoln Workforce Alliance ▾
Provider: [Testing20-20 Illinois workNet Center](#) *
Start Date: 03/08/2021
End Date:
*Current Status:
Comments:



Successful/Unsuccessful Service

When Career Planners are unsure whether to mark a service successful or unsuccessful, they should reach out to their supervisor for advice. If after discussion with the supervisor further guidance is needed, reach out to the DCEO/OET programmatic monitoring staff assigned to your LWIA.

Same Day Service Case Note

For all same day services, IWDS requires recording a Same Day Service Case Note that will automatically come up after you click on 'Save' for the service.

Informational Message:

A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.

Add Case Note

[WIOA Services](#) [Application Summary](#)

Staff Name: [Jim Potts \(DWG\)](#)

Contact Date: 03/08/2021

Program:

* Note Category:

* Confidential:

* Note Subject:

* Case Note:

Save and Return

Same Day Service Case Note

- The 'Note Subject' should be tailored to the specific details of the interaction when appropriate.
- Same Day Service Case Note should detail what happened during this service. It should include what 'next steps' are planned with the participant.
- Once a note is completed and is 'Saved' the system will take the user back to the services screen.

Add Case Note

[WIOA Services](#) [Application Summary](#)

Staff Name: Jim Potts (DWG)

Contact Date: 03/08/2021

Program:

*Note Category:

*Confidential:

*Note Subject:

*Case Note:

Additional Episode of Same Day Service

- For any participant who has had any original same day service recorded, Career Planners are to 'Add an Additional Episode' of the original service versus putting in a new service each time that same service is completed.
- This can be easily accomplished by clicking in the original service. This example will show the Career Planning (Case Management) that was started on 3/08/2021.

Services

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

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Start Date	End Date	Service Provided	Status	Created By
03/08/2021	03/08/2021	Career Planning (Case Management) - 1A	Successful Completion	Jim Potts (DWG)

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Additional Episode of Same Day Service

- For this example, the participant came back in the office the following day for another appointment and received additional 'Career Planning (Case Management)' services.
- To record this, the Career Planner clicks on 'Add Additional Episode' on the original service screen as shown in the example to capture the services provided and comments from the new appointment.
- The same day service case note will come up.

Edit Required Activity Information
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Date Created: 03/08/2021
Last Updated By: Jim Potts (DWG)
Last Updated: 03/08/2021
Title: 1A

Service Level: Career Services
Activity: Career Planning (Case Management) **Same Day Service**
*Grant: 19681020-Land of Lincoln Workforce Alliance
Provider: Testing20-20 Illinois workNet Center
Start Date: 03/08/2021
End Date: 03/08/2021
Current Status: Successful Completion

Comments:

Additional Info
Add Additional Episode

Save Cancel

Additional Episode of Same Day Service

- Populate the case note with the actions that were completed related to the current episode of the same day service and when 'saved'. Note the end date to that original 'Career Planning (Case Management)' service will then reflect the updated date of 03/09/2021.
- If for some reason there was data lag and the actual episode of the same day service was held on a different date, the 'Contact Date' on the note could be modified to an earlier date.

Informational Message:

A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

Add Case Note

[WIOA Services](#) [Application Summary](#)

Staff Name: [Jim Potts \(DWG\)](#)

*Contact Date: 03/09/2021

Program: WIOA

*Note Category: Case Note Supporting Same Day Service

*Confidential: No

*Note Subject: Brought in Research From Training Program

*Case Note: "W" came in today to discuss the options for training. He has been researching various CDL truck driving classes. I explained we still needed to complete his assessment, we scheduled

Save and Return

Additional Episode of Same Day Service

On this example, notice the end date of the Career Planning (Case Management) Service now reflects the **03-09-2021** end date. Which matches up with the episode of Career Planning (Case Management) that was recorded in the case note on the previous slide.

Services

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
03/08/2021	03/09/2021	Career Planning (Case Management) - 1A	Successful Completion	Jim Potts (DWG)

Page 1 of 1

Additional Episode of Same Day Service

- There are several advantages to recording same day services by simply 'Add Additional Episode'. Primarily, it is time saving for the Career Planner who does not have to recreate the entire service each time it is provided.
- Using this 'Add Additional Episode' button replaces the need to record the 'Standard Case Note', since the information will be recorded under a same day service case note.
- Additionally, if an individual participant is in services for a significant length of time, by utilizing the 'Add Additional Episode' feature, the services screen will be much more manageable and not extend into multiple pages.

Career Planning Policy

- Under the new Career Planner Policy that will be issued soon, there is going to be direction for recording the service of Comprehensive and Specialized Assessment.
- Every Adult and Dislocated Worker participant who is entering Training Services **must** have received this service to assist in development of the IEP. Often the actual service of Comprehensive and Specialized Assessment **has not** been recorded on the Adult and Dislocated Worker records.
- It is important to understand from a monitoring perspective, both at the State and from the Federal level, to document, document, document.
- On the next several slides we will discuss and demonstrate recording different components relative to the Comprehensive and Specialized Assessment.



Comprehensive and Specialized Assessment

This service is provided to make determinations of a participants' skill levels and service needs. It is used to record diagnostic tests and comprehensive and/or specialized assessments of participant's barriers to employment, occupational goal(s), along with the occupational knowledge, skills, and abilities associated with that goal and service needs. This service may include interpreting the results of assessment tools as well as in-depth interviewing and evaluation to identify employment barriers and appropriate employment goals.

Assessment Summary Screen

- Under the new Career Planning Policy, there is going to be guidance that the 'Assessment Summary' screen within IWDS needs to be utilized for recording actions taken during the assessment.
- The 'Assessment Summary' screen can be accessed from the main application menu of a participant's IWDS record, under the first column of a clients 'Application Menu'.

Application Menu

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

Printable Application

<p>Application</p> <ul style="list-style-type: none"> • Guided Application • Application Definition • Assessment Summary • Concurrent Programs • Characteristics and Barriers • Employment Characteristics • Education Status • Tests • Public Assistance • Youth Barriers • Family Characteristics • Income Calculation • Dislocated Worker Characteristics • LWA Specific Data • WIOA Training Criteria • Eligibility Determination 	<p>Profile</p> <ul style="list-style-type: none"> • Contact Information • Additional Contacts • Private Information • Veterans Information • Employment History • Credentials • Education Status - In Program Update • Measurable Skill Gains • List All Documents 	<p>Services</p> <ul style="list-style-type: none"> • List Enrolled Services • ITA Characteristics • List Part Time/Distance Learning <p>Exit</p> <ul style="list-style-type: none"> • Exit Summary • View Wages • Performance Impact
--	--	--

Assessment Summary Screen

Many Career Planner staff are familiar with the 'Assessment Summary' screen, but for those who are not familiar with the screen, there will be upcoming training on utilizing this section for recording elements associated with your participant's assessment.

Assessment Summary

[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

NARRATIVES	Update
Currently there are no Narratives Data	
TESTS	Update
Math GLE Score: 99 Reading GLE Score: 99	
EMPLOYMENT GOALS	Update
Currently there are no Employment Goals Data	
INCOME & EXPENSE WORKSHEET	Update
Currently there no Income & Expense Data	

Enrolling in Service From Application Menu

- Another way a participant could have a service added is from the main 'Application Menu' under 'Services', first item 'List Enrolled Services'.
- When that is clicked, it brings up the participant's current service screen.

Application Menu

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

Printable Application

<p>Application</p> <ul style="list-style-type: none"> • Guided Application • Application Definition • Assessment Summary • Concurrent Programs • Characteristics and Barriers • Employment Characteristics • Education Status • Tests • Public Assistance • Youth Barriers • Family Characteristics • Income Calculation • Dislocated Worker Characteristics • LWA Specific Data • WIOA Training Criteria • Eligibility Determination 	<p>Profile</p> <ul style="list-style-type: none"> • Contact Information • Additional Contacts • Private Information • Veterans Information • Employment History • Credentials • Education Status - In Program Update • Measurable Skill Gains • List All Documents 	<p>Services</p> <ul style="list-style-type: none"> • List Enrolled Services • ITA Characteristics • List Part Time/Distance Learning <p>Exit</p> <ul style="list-style-type: none"> • Exit Summary • View Wages • Performance Impact
--	--	--

Adding Comprehensive and Specialized Assessment Service

- This screen should look familiar, as this was the screen that we were on earlier when we completed the additional episode of Career Planning (Case Management) back on 3/09/2021.
- From here, to add other services, click on 'Add Enrolled Service'.

Services

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
03/08/2021	03/09/2021	Career Planning (Case Management) - 1A	Successful Completion	Jim Potts (DWG)

Page 1 of 1



Comprehensive and Specialized Assessment

- Comprehensive and Specialized Assessment is designated as a Same Day Service. It should be recorded on any Adult and Dislocated Worker participant when any components related to the participant's assessment and testing are accomplished by or with a participant.
- As previously demonstrated on slides 36-43, the title 1A, the service level of Career Services, the grant to fund the service, and the 'Provider' for the service were selected.
- Like any other Same Day Service, the end date and Current Status should be added, and when 'Saved', the same day service case note will come up (see the next slide).

Add Required Activity Information
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Career Services
Activity: Comprehensive and Specialized Assessment **Same Day Service**
*Grant: 19681020-Land of Lincoln Workforce Alliance ▾
Provider: [Testing20-20 Illinois workNet Center](#) *
Start Date: 03/09/2021
End Date: 03/09/2021
*Current Status: **Successful Completion** ▾
Comments:

→

Comprehensive and Specialized Assessment

- As with any Same Day Service, when you 'Save', the service Case Note box will automatically appear.
- When the note is complete, click 'Save and Return', the services screen will then appear. When the note is complete, click 'Save and Return', the services screen will then appear.
- In the future, when any other actions associated with the participant's assessment is completed, the original 'Comprehensive and Specialized Assessment' service should have an additional episode recorded.

Informational Message:

A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.

Add Case Note

[WIOA Services](#) [Application Summary](#)

Staff Name: [Jim Potts \(DWG\)](#)

Contact Date: 03/09/2021

Program: WIOA

*Note Category: Case Note Supporting Same Day Service

*Confidential: No

*Note Subject: Initial Assessment Supporting Training

*Case Note: "W" came in today for his second appointment, he is very interested in attending CDL truck driving training as he has researched the industry and feels it is a very good fit for his

Save and Return

Adding Another Service

- From the Services screen, we are now going to record the service of “Development of an IEP”.
- As was mentioned previously, for any Adult or Dislocated Worker participant that is going to be enrolled in WIOA Training services, there is internal logic within IWDS that requires the service of ‘Development of an IEP’ recorded on the record before any WIOA Training service can be populated.
- Click on ‘Add Enrolled Services’ to move forward.

Services

[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

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Start Date	End Date	Service Provided	Status	Created By
03/09/2021	03/09/2021	Comprehensive and Specialized Assessment - 1A	Successful Completion	Jim Potts (DWG)
03/08/2021	03/09/2021	Career Planning (Case Management) - 1A	Successful Completion	Jim Potts (DWG)

Page 1 of 1

→

Development of an IEP

- As was demonstrated in previous services, the 1A title, Career Service level, verification of the grant and the Provider were selected.
- This is a Same Day Service as indicated by the red text after the activity, so the end date of 03/09/2021 and 'Successful Completion' were added.
- This service, along with many others, requires a 'Weekly Hours' estimate. This should be the time it has taken to put together the IEP.
- Click 'Save' and the Same Day Service case note will appear.

Add Required Activity Information
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Career Services
Activity: Development of an IEP **Same Day Service**
*Grant: 19681020-Land of Lincoln Workforce Alliance ▾
Provider: [Testing20-20 Illinois workNet Center](#) *
Start Date: 03/09/2021
End Date: 03/09/2021
*Current Status: Successful Completion ▾
*Weekly Hours: 1
Comments:

Same Day Service Case Note

- Under current guidance there is no direction requiring certain processes to be followed for the hard copy of the IEP.
- However, best practice is for the hard copy of the IEP be completed and placed in the participant's file supporting the participant moving forward into Training Services.
- It is important to understand, the IEP is a living document that should be updated when situations arise that require changes.

Informational Message:

A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.

Add Case Note

[WIOA Services](#) [Application Summary](#)

Staff Name: [Jim Potts \(DWG\)](#)

Contact Date: 03/09/2021

Program: WIOA

*Note Category: Case Note Supporting Same Day Service

*Confidential: No

*Note Subject: Initial IEP

*Case Note: Met with WIOA today and we completed his initial IEP. See the complete IEP in his original file.

Save and Return



Same Day Services

In the past several slides, recording three different services that are considered 'Same Day Services' have been demonstrated. When subsequent episodes of either Career Planning (Case Management); Comprehensive and Specialized Assessment; or Development of an IEP is completed for the same participant, the 'Add Additional Episode' process shown under slides 46-50 should be followed.

Note: If your interaction with the participant was not two-way communication, you should not be recording under the same day service, you would want to record under a standard case note. **Example:** If a Career Planner reached out to Mr. Jones and left a voice mail asking him to return the call, this would not be an additional episode of Career Planning (Case Management) and should be recorded as a standard case note.

Current List of Same Day Services

Adult / Dislocated Worker Same Day Services

- Referred to Employment/Placement Assistance (STAFF Assisted)
- Job Search Activities and Assistance (STAFF Assisted)
- UI Filing Information (STAFF Assisted)
- Assistance Establishing Eligibility for Financial Aid (STAFF Assisted)
- Comprehensive and Specialized Assessments
- Development of an IEP
- Group Workforce Research/Workshops/Job Clubs
- Career Planning (Case Management)
- Out-of-Area Job Search/Relocation Assistance

Select Activity
[WIOA Services](#) [Application Summary](#)
 SSN: 2398 App LWA:20 App Date:03/08/2021

Title: 1A
Service Level: Career Services
*** Activity:** **Adult Basic Education (ABE) (Developmental Education)**
Start Date:

Assistance Establishing Eligibility for Financial Aid/FAFSA(staff-assisted) ←

Career Planning (Case Management) ←

Comprehensive and Specialized Assessment ←

Development of an IEP ←

English Language Education

Federal Job Referral and Placement Services

Financial Literacy Services

Follow-up Services

Group Workforce Research/Workshops/Job Club ←

Job Search Activities & Assistance (STAFF) ←

Out-of-Area Job Search/Relocation Assistance ←

Referred to Employment/Placement Assistance (STAFF ASSISTED) ←

Short Term Prevocational Services (Job Readiness)

SS - Child Dependent Care

SS - Healthcare

SS - Housing Assistance

SS - Other Supportive Services

SS - Tools/Equipment

SS - Transportation

SS - Uniforms

Training Paid by Non-WIOA TITLE I Funds

UI Filing Information (staff-assisted) ←

Workforce Preparation Activities

WBL - Job Shadowing

WBL - Paid WEX/Internship (Not Limited to Summer Months)

WBL - Pre-Apprenticeship Program

WBL - Transitional Jobs

WBL - Unpaid WEX/Internship (Not limited to Summer Months)

X - Holding

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A Survey Question

Q – Mr. Jones is a participant and has been in communication with his Career Planner via a planned phone call every three weeks while he has been in WIOA funded training. Yesterday was the day that Mr. Jones was scheduled to check in, but he did not call. Today, the Career Planner phoned Mr. Jones, but only received his voice mail. A message was left asking him to return the call. How should this action be recorded?

- A. Record an 'Additional Episode' of Career Planning (Case Management), and under the same day service case note indicate a voice mail was left.
- B. Record a standard case note about missing the scheduled check in date and that he was left a voice mail to call back and check in.
- C. Record a new service for Mr. Jones regarding leaving him a voice mail.

Answer to Poll Question

The appropriate way to record this communication of leaving Mr. Jones a voice mail would be under the standard case note.

- You **would not** want to record under an additional episode of a current service or create a new service since there has not been any actual two-way communication or service provided.
- When Mr. Jones returns the call and there is two-way communication, then it could be appropriate to add an 'Additional Episode' of a previous Career Planning (Case Management) Same Day service case note of the conversation updating his status during WIOA training/services.



WIOA Training Services

Under WIOA Title IB, before an Adult or a Dislocated Worker can receive WIOA funded training services, the participant must have a complete assessment and the IEP must be developed supporting the following issues:

- The participant is unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone;
- Support that the participant needs training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment;
- Has the skills and qualifications to successfully participate in the selected program of training services; and
- Other grant sources are unavailable.

WIOA Training Services

For an Adult or Dislocated Worker to enter in training services, the participant must have their WIOA application certified up to the Training Service Level.

- This requires the participant to have a complete assessment and has their IEP completed.
- For the mock participant on this slide, they have been certified under the Adult Application up to the Training Services level under both the Adult Priorities applicable to this participant.

Eligibility Determination

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1A - Adult BSD Career Services	03/08/2021	03/08/2021
Documentation	Criteria	Yes	1A - Adult BSD Training Services	03/09/2021	03/09/2021
Documentation	Criteria	Yes	1A - Adult Low Income Training Services	03/09/2021	03/09/2021
Documentation	Criteria	Yes	1A - Adult Low Income Career Services	03/08/2021	03/08/2021

* Application Date: 03/08/2021

* Eligibility Determination Date:

Printable Application

Determine Eligibility >

WIOA Services Screen for the Mock Participant

Enrolling the participant into training Services.

- However, there is another internal logic item that needs examined.
- This is tied to how the actual WIOA Training could be funded.
- Go back to the main 'Application Menu' screen for the participant, from the services screen just hit on one of the 'Return' buttons near the bottom or top.

Services

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

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Start Date	End Date	Service Provided	Status	Created By
03/09/2021	03/09/2021	Comprehensive and Specialized Assessment - 1A	Successful Completion	Jim Potts (DWG)
03/09/2021	03/09/2021	Development of an IEP - 1A	Successful Completion	Jim Potts (DWG)
03/08/2021	03/09/2021	Career Planning (Case Management) - 1A	Successful Completion	Jim Potts (DWG)

Page 1 of 1



WIOA Funded Training Options

- Under WIOA, training services are typically funded either from an:
 - Individual Training Account (ITA) - which is like a college fund with a dollar amount that the participant's services draw down from. This is the most common method of funding. **OR**
 - Contract Funded Training – only when one or more the five exceptions as outlined in WIOA occur. The most used contract funded training includes on-the-job training (OJT), customized training, incumbent worker training, or transitional jobs.

ITA Characteristics Screen

Within IWDS internal logic, it requires the ITA Characteristics screen to be completed before a client could be enrolled in most training services.

Application Menu
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021
Printable Application

<p>Application</p> <ul style="list-style-type: none">• Guided Application• Application Definition• Assessment Summary• Concurrent Programs• Characteristics and Barriers• Employment Characteristics• Education Status• Tests• Public Assistance• Youth Barriers• Family Characteristics• Income Calculation• Dislocated Worker Characteristics• LWA Specific Data• WIOA Training Criteria• Eligibility Determination	<p>Profile</p> <ul style="list-style-type: none">• Contact Information• Additional Contacts• Private Information• Veterans Information• Employment History• Credentials• Education Status - In Program Update• Measurable Skill Gains• List All Documents	<p>Services</p> <ul style="list-style-type: none">• List Enrolled Services• ITA Characteristics ←• List Part Time/Distance Learning <p>Exit</p> <ul style="list-style-type: none">• Exit Summary• View Wages• Performance Impact
---	--	--

Details about ITA Characteristics Screen

- The only training services that do not require the ITA Characteristics screen to be completed are for Customized Training; OJT (either Private or Public Sector); and Training Paid by Non-WIOA TITLE 1 Funds.
- Even training for ‘Placed in Adult Secondary Education’ and ‘Prerequisite Training Courses’ where there really is not an actual O*Net Code for the training, an O*Net Code must be populated on the ITA Characteristics screen.
 - In those instances where the initial training might not have an O*Net, since internal logic within IWDS requires an O*Net, record the O*Net for the participant’s overall employment goal that the individual will eventually move forward with in training once secondary education or prerequisite training course are completed.

ITA Characteristics Screen

- The ITA Characteristics screen asks for the dollar amount of the ITA.
- If the training will not be funded via an ITA, but under contract funded training leave the ITA Amount blank.
- The Occupational Goal (O*Net) of the participant per their IEP must be populated.
 - If there is not an O*Net populated, an information/error message will come up stating the ITA Characteristics screen must be completed.

ITA Characteristics
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

ITA Amount:

Occupational Goal (O*Net):

ITA Characteristics Screen

- There is not internal logic within IWDS that makes sure that the dollar amounts under the ITA Amount or that the O*Net provided matches the actual training service. This is something that the monitoring staff does review when they are conducting monitoring, so it should be accurate.
- For this mock participant, below is how the ITA Characteristics screen was completed:

ITA Characteristics

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

ITA Amount: x

Occupational Goal (O*Net):

Description: Heavy and TractorTrailer Truck Drivers
Growth Occupation?: Y



Enrolling in WIOA Training Services

- There is another internal logic check within IWDS for an Adult or a Dislocated Worker that is being enrolled in training. As part of the participant's assessment to support the participant should be able to complete the training in which they are being placed, the participant must have a math and reading assessment test recorded in their IWDS record either on or before the first date of the actual training service starting.
- Additionally, policy guidance states for an Adult or Dislocated Worker the participant must have their math and reading test within one year of the beginning of the training service.

Note: Under the current Basic Skills Deficient Policy, there is guidance for waiving testing requirements under certain circumstances. Please refer to the Basic Skills Deficiency Policy for the current guidance related to exceptions to the testing requirements addressed above.

Enrolling in WIOA Training Services

- Now getting back to enrolling the 'example' participant in training services.
- The participant has been certified up to the Training Services level, so now the system allows a choice of either Career Services or Training Services.

Select Service Level and Start Date

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

Title: 1A

*Service Level:
*Start Date:

< Back

Next >

Select Service Level and Start Date

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

Title: 1A

*Service Level:
*Start Date:

Next >

Occupational Skills Training

- All WIOA Occupational Skills Training for an Adult or a Dislocated Worker participant is required to be funded under either an ITA or under limited conditions funded through Contracts.
- This participant is going into Occupational Skills Training that will be funded by an ITA.
- If the training was being funded by 'Contract Funded Training', then 'Yes' would have been in that response.
- Only one 'Yes' under either ITA Funded or Contract Funded Training is an allowable response.

Select Training Type
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Title: 1A
Service Level: Training Services
Activity: Occupational Skills Training

* ITA Funded Training:

* Contract Funded Training:

Start Date: 03/22/2021

< Back Next >

Select Training Type
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Title: 1A
Service Level: Training Services
Activity: Occupational Skills Training

* ITA Funded Training: Yes No

* Contract Funded Training: Yes No

Start Date: 03/22/2021

< Back Next >

Cancel

Occupational Skills Training

- As was mentioned previously, when enrolling a participant in a service, a red asterisk (*) means there must be a response in that field before the service can be saved.
- For the Occupational Skills Training, there are many fields that require a response to be populated. The following slides will go into detail on some of those that have not been previously discussed.
 - Green related field is asking about jobs that would be considered 'Green' for the environment. Jobs such as solar related careers could be considered green related. This question was added several years back, but no longer has reporting criteria tied to the response.

Add Required Activity Information

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Training Services
Activity: Occupational Skills Training
*Grant: 19681020-Land of Lincoln Workforce Alliance

ITA Funded Training: Yes
Contract Funded Training: No

→ *Green Related:

Provider: * Search

*CIP Code: Search

*O*Net Code: Search Requires O*Net

Start Date: 03/22/2021
End Date:

*Current Status: Open

*Weekly Hours:

*Bridge Program Activity? No

Comments:

Occupational Skills Training

- This example participant is going to be enrolled in CDL Truck driving training, so it would be a 'No' to the "Green Related" question.
- Next, we will need to identify the 'Provider' and the Certified WIOA training program that will be used for this example.
- Then the service will require the CIP Code and the O*Net Code. As was mentioned previously, there is no logic that requires the participant's O*Net populated on the screen as compared to what is on the ITA Characteristics screen, but it still should match.

Add Required Activity Information
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Training Services
Activity: Occupational Skills Training
*Grant: 19681020-Land of Lincoln Workforce Alliance

ITA Funded Training: Yes
Contract Funded Training: No
*Green Related: No

Provider: Search Providers

*CIP Code: Search
*O*Net Code: Search Requires O*Net

Start Date: 03/22/2021
End Date:

*Current Status: Open
*Weekly Hours:

*Bridge Program Activity? No

Comments:

Occupational Skills Training

- For this training, the provider is Heartland Community College. The user should find and select the WIOA Certified Training Programs by clicking 'Search Certified Programs'.
- The next few slides will demonstrate identifying and then selecting the CDL Truck Driving Training Program for the participant.

Add Required Activity Information
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Training Services
Activity: Occupational Skills Training
*Grant: 19681020-Land of Lincoln Workforce Alliance

ITA Funded Training: Yes
Contract Funded Training: No
*Green Related: No

Provider: 2080-00 Heartland Community College * Search Providers

Certified Program: Search Certified Programs

*CIP Code: Search
*O*Net Code: Search Requires O*Net

Start Date: 03/22/2021
End Date:

*Current Status: Open

*Weekly Hours:

*Bridge Program Activity? No

Comments:

Occupational Skills Training

For the search, a user could:

- Click 'Show All', which would show every WIOA Certified Program at Heartland Community College;
- Search using a key word under the Certified Program Name; or
- Search by the CIP Code.

Search Certified Programs

Show All ←

Provider Relationship: Heartland Community College
Start Date: 03/22/2021

Certified Program Name:

CIP Code:

Search Cancel

Search Certified Programs

Show All

Provider Relationship: Heartland Community College
Start Date: 03/22/2021

Certified Program Name: Truck ← x

CIP Code:

Search Cancel

Search Certified Programs

Show All

Provider Relationship: Heartland Community College
Start Date: 03/22/2021

Certified Program Name:

CIP Code: 490205 ←

Search Cancel

Occupational Skills Training

- Searching using the key word of 'Truck' or the O*Net of 490205 produces the same list of the three different programs shown on the adjacent screen print.
- For this example, the middle program, 'CDL Truck Driver Training Program' is being selected.
- Realize this is the training platform of IWDS and might not have 'real' current training programs. You must ensure you choose the correct, 'real' program your participant will attend when working in production IWDS.

Approved Training Programs Search Results
Return To Search

Service Provider Entity: Heartland Community College
Location: 1500 W. Raab Rd., Normal, IL 61761
Relationship Number: 2080

3 found Page 1 of 1

	Program Name	CIP	Program ID	Certification Begins	Certification Ends
Pick	Advanced Truck Driver Training	490205	1009435	03/30/2016	06/12/2017
Pick	CDL Truck Driver Training Program	490205	1003172	07/03/2007	06/13/2017
Pick	Truck Driver Trainer Refresher	490205	1009830	11/30/2016	11/29/2017

Page 1 of 1

Return To Search

Occupational Skills Training

- For this participant, under the ITA Characteristics screen for this participant we populated O*Net 533032, so that is what we have populated in the record.
- Users could also use the 'Search' and 'View Available' features to find your O*Net.
- Weekly hours are self explanatory for the training program the participant will attend.

Add Required Activity Information

[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Training Services
Activity: Occupational Skills Training
*Grant: 19681020-Land of Lincoln Workforce Alliance

ITA Funded Training: Yes
Contract Funded Training: No
*Green Related: No

Provider: 2080-00 Heartland Community College *
Certified Program: CDL Truck Driver Training Program
CIP Code: 490205
CIP Description: Truck and Bus Driver/Commercial Vehicle Operator and Instructor.

*O*Net Code:
Requires O*Net

Start Date: 03/22/2021
End Date:

*Current Status: Open

*Weekly Hours:

*Bridge Program Activity? No

Comments:


Occupational Skills Training

- Bridge programs prepare adults with limited academic or limited English skills to enter and succeed in credit bearing postsecondary education and training leading to career-path employment in high-demand, middle and high-skilled occupations. The goal of bridge programs is to sequentially bridge the gap between the initial skills of individuals and what they need to enter and succeed in postsecondary education and career-path employment.
- Bridge Program Activity would be a 'No' for this CDL Truck Driving Training Program.

Add Required Activity Information
[WIOA Services](#) [Application Summary](#)
SSN: 2398 App LWA:20 App Date:03/08/2021

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Training Services
Activity: Occupational Skills Training
*Grant: 19681020-Land of Lincoln Workforce Alliance ▼

ITA Funded Training: Yes
Contract Funded Training: No
*Green Related: No ▼

Provider: 2080-00 Heartland Community College *
Certified Program: CDL Truck Driver Training Program
CIP Code: 490205
CIP Description: Truck and Bus Driver/Commercial Vehicle Operator and Instructor.
* O*Net Code: 533032
Start Date: 03/22/2021
End Date:
*Current Status: Open ▼
*Weekly Hours: 15
*Bridge Program Activity? No ▼ 
Comments:

Adult Client Services Screen

- This concludes the portion for recording services for this 'example' Adult participant.
- When enrolling a Dislocated Worker participant in Career and Training Services the processes are very similar, the only significant issue is ensuring that the correct title is selected.
- On the next slide few slides the 'example' Dislocated Worker participant will demonstrate about the title.

Informational Message:
The record has been added.

Services

[WIOA Services](#) [Application Summary](#)

SSN: 2398 App LWA:20 App Date:03/08/2021

Add Enrolled Service

Printable Services

Return

4 found

Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
03/22/2021		Occupational Skills Training - 1A	Open	Jim Potts (DWG)
03/09/2021	03/09/2021	Comprehensive and Specialized Assessment - 1A	Successful Completion	Jim Potts (DWG)
03/09/2021	03/09/2021	Development of an IEP - 1A	Successful Completion	Jim Potts (DWG)
03/08/2021	03/09/2021	Career Planning (Case Management) - 1A	Successful Completion	Jim Potts (DWG)

Page 1 of 1

Add Enrolled Service

Printable Services

Return

Dislocated Worker Client

- When a participant has their eligibility certified under any traditional Dislocated Worker criteria, as shown in the adjacent slide, the participant is certified under the titles of 1D – 1N – 1S – 1E – 1DC – 1EC.
- This means if an LWIA or a grantee for state-wide grants under LWIA 90 is certified under any Dislocated Worker title, they could be enrolled under any grants awarded at that agency under any of those titles.
 - It should be noted, the 1DC and 1EC is set-up currently for Co-enrolled Trade/WIOA clients and is not an option for a participant who has not been certified under Trade.

Eligibility Determination

[Standard Application](#) [Application Summary](#)

SSN: 3232 App LWA:20 App Date:12/22/2020

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1D - 1N - 1S - 1E - 1DC - 1EC - Dislocated Worker Career Services - Plant Closure or Substantial Lay-off	12/22/2020	12/22/2020
Documentation	Criteria	Yes	1D - 1N - 1S - 1E - 1DC - 1EC - Dislocated Worker Training Services - Plant Closure or Substantial Lay-off	12/22/2020	12/22/2020

* Application Date: 12/22/2020

* Eligibility Determination Date:

Printable Application

Determine Eligibility >

Dislocated Worker Client

- As was demonstrated under the Adult example, services are added from the Services screen that appears after a participant has been certified or could be accessed from the participant's Application Menu by clicking on 'List Enrolled Services'.
- This example Dislocated Worker participant has been enrolled in several services already.
- We are now going to demonstrate recording a supportive service as this participant needs transportation service.
- Click on 'Add Enrolled Services' button near the top or the bottom.

Services

[Standard Application](#) [Application Summary](#)
 SSN: 3232 App LWA:20 App Date:12/22/2020

Add Enrolled Service
 Printable Services
 Return

4 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
01/10/2021		OJT - Private Sector - 1D	Open	Jim Potts (DWG)
12/22/2020	01/10/2021	Development of an IEP - 1D	Successful Completion	Jim Potts (DWG)
12/22/2020	01/09/2021	Comprehensive and Specialized Assessment - 1D	Successful Completion	Jim Potts (DWG)
12/22/2020	03/10/2021	Career Planning (Case Management) - 1D	Successful Completion	Jim Potts (DWG)

Page 1 of 1

Add Enrolled Service
 Printable Services
 Return

Dislocated Worker Client

- As was discussed in the previous slides, the participant has several options under 'Title'.
- Never choose the option of 'OTH' as that was added to allow outside funding sources the option of being used. Currently there are no 'OTH' grants and if it is selected, it causes some significant errors where the participant record cannot be exited once all services are completed. Note internal logic should not allow it to be selected.
- During IWDS training, guidance is passed on to select "OTH" as the title, if the Career Planner would like to pay for the service out of your own pocket, that typically sticks with people as a reason not to select **OTH**!

Select Title

[Standard Application](#) [Application Summary](#)

SSN: 3232 App LWA:20 App Date:12/22/2020

*Title: OTH

1D
1DC
1E
1EC
1N
1S

< Back

Next >

Select Title

[Standard Application](#) [Application Summary](#)

SSN: 3232 App LWA:20 App Date:12/22/2020

*Title: 1D

< Back

Next >

Cancel

Dislocated Worker Client

- Most dislocated worker grants are typically under the 1D or the 1E funding stream.
- Many of the National Disaster Recovery Grants (DWG) and other similar Disaster/Crisis related grants are typically under the 1N title.
- It is important to reach out to your supervisor if you are not sure of the funding stream for your Dislocated Worker participant when enrolling the participant in services.
- Other than the title, the processes of enrolling a Dislocated Worker participant are the same as enrolling an Adult participant in services.

Select Service Level and Start Date
[Standard Application](#) [Application Summary](#)
SSN: 3232 App LWA:20 App Date:12/22/2020

Title: 1D

*Service Level:

*Start Date:

< Back Next >

Cancel

Select Service Level and Start Date
[Standard Application](#) [Application Summary](#)
SSN: 3232 App LWA:20 App Date:12/22/2020

Title: 1D

*Service Level:

*Start Date:


< Back Next >

Cancel

Dislocated Worker Client

- As was demonstrated previously for this service, the 1D title was selected and Career Service level was chosen. Now the user must verify the correct grant and select the Provider.
- This service was provided and closed on the same date with a service status as 'Successful Completion'.
- Also, an 'Additional Episode' of the Career Planning (Case Management) service was added on the same date of 3/22/2021 and provides details supporting the Transportation Service.

Add Required Activity Information
[Standard Application](#) [Application Summary](#)
SSN: 3232 App LWA:20 App Date:12/22/2020

Created By: Jim Potts (DWG)
Title: 1D
Service Level: Career Services
Activity: SS - Transportation
*Grant: 19681020-Land of Lincoln Workforce Alliance ▾
Provider: [Testing20-20 Illinois workNet Center](#) *
Start Date: 03/22/2021
End Date: 3/22/2021
*Current Status: Successful Completion ▾ 
*Supports Bridge Program?: No ▾
Comments:

Dislocated Worker Client

Informational Message:

A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

Add Case Note

[Standard Application](#) [Application Summary](#)

Staff Name: [Jim Potts \(DWG\)](#)

*Contact Date:

Program:

*Note Category:

*Confidential:

*Note Subject:

*Case Note:

Services

[Standard Application](#) [Application Summary](#)

SSN: 3232 App LWA:20 App Date:12/22/2020

5 found

Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
03/22/2021	03/22/2021	SS - Transportation - 1D	Successful Completion	Jim Potts (DWG)
01/10/2021		OJT - Private Sector - 1D	Open	Jim Potts (DWG)
12/22/2020	01/10/2021	Development of an IEP - 1D	Successful Completion	Jim Potts (DWG)
12/22/2020	01/09/2021	Comprehensive and Specialized Assessment - 1D	Successful Completion	Jim Potts (DWG)
12/22/2020	03/22/2021	Career Planning (Case Management) - 1D	Successful Completion	Jim Potts (DWG)

Page 1 of 1



WIOA Youth Services

- We have now worked with an Adult and a Dislocated Worker participant; next we will transition to the Youth Program.
- One of the most significant changes under the Youth title is related to the requirement for the complete assessment and the service strategy must be initiated prior to enrollment in the WIOA Youth Program.
- Additionally, where the Adult and Dislocated Worker title has the Individual Employment Plan, under the Youth title the plan to support enrollment in services is called the Individual Service Strategy (ISS).

WIOA Youth Client

The mock participant below has been certified under the Out-of-School Youth title as of 3/10/2021.

Eligibility Determination

[Blank Application](#) [Application Summary](#)

SSN: 1234 App LWA:20 App Date:03/10/2021

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1Y - Out-of-School Youth	03/10/2021	03/10/2021

* Application Date: 03/10/2021

* Eligibility Determination Date:

WIOA Youth Client

- As mentioned, before any Youth participant can be registered in services, they are legislatively required to have a complete assessment and their ISS completed prior to enrollment in WIOA. That information is what drives the participant's enrollment into the WIOA Youth program.
- Like the Adult and the Dislocated Worker participant before, enrollment in the services begin at the services screen.
 - That screen comes up after a participant has their eligibility certified or can be accessed after certification from the application menu under 'List Enrolled Services'.

The screenshot shows the 'Services' page in the WIOA Youth Client system. At the top, there are links for 'Blank Application' and 'Application Summary', and fields for 'SSN: 1234', 'App LWA:20', and 'App Date:03/10/2021'. Below this are three buttons: 'Add Enrolled Service' (highlighted with a red arrow), 'Printable Services', and 'Return'. A table below shows '0 found' and 'Page 1 of 1'. The table has columns for 'Start Date', 'End Date', 'Service Provided', 'Status', and 'Created By'. A yellow banner across the table contains the text 'There is nothing to display.' Below the table, there are three more buttons: 'Add Enrolled Service' (highlighted with a red arrow), 'Printable Services', and 'Return'.

WIOA Youth Client

- For a Youth, the 1Y title must be selected.
- For the service level, **all** Youth Service are under the 'Youth Service Elements Education/Training/Career' level.
- For all Youth participant's the first service/activity recommended is the ISS as that is the actual document that was the basis to support the enrollment.

Select Service Level and Start Date

[Blank Application](#) [Application Summary](#)

SSN: 1234 App LWA:20 App Date:03/10/2021

Title: 1Y

*Service Level: ←

*Start Date:

< Back Next >

Cancel

WIOA Youth Client

- An ISS is completed prior to enrollment, but Career Planners will only be able to add the service on or after the date the participant has had their WIOA Youth eligibility certified.
- It is a Same Day Service, as signified by the text next to the 'Activity' name.
- As previously discussed, each item that has a red asterisk (*) must have a response recorded.
- Click 'Save' and it will bring up a same day service case note box.

Add Required Activity Information
[Blank Application](#) [Application Summary](#)
SSN: 1234 App LWA:20 App Date:03/10/2021

Created By: Jim Potts (DWG)
Title: 1Y
Service Level: Youth Service Elements: Education/Training/Career
Activity: Individual Service Strategy **Same Day Service** ←
*Grant: 19681020-Land of Lincoln Workforce Alliance ▾
Provider: [Testing20-20 Illinois workNet Center](#) *
Start Date: 03/10/2021
End Date: 03/10/2021
*Current Status: Successful Completion ▾
*Weekly Hours: 1
* Bridge Program Activity?: No ▾
Comments:

Same Day Service Case Note

Informational Message:

A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.

Add Case Note

[Blank Application](#) [Application Summary](#)

Staff Name: [Jim Potts \(DWG\)](#)

Contact Date: 03/10/2021

Program: WIOA

*Note Category: Case Note Supporting Same Day Service

*Confidential: No

*Note Subject: Initial ISS

*Case Note: "B" came in for her appointment ready to move forward. She had been in back in December 2020 and had taken her Math and Reading assessment tests. Then she had to go out of town with her

Save and Return

Services

[Blank Application](#) [Application Summary](#)

SSN: 1234 App LWA:20 App Date:03/10/2021

Add Enrolled Service Printable Services Return

1 found

Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
03/10/2021	03/10/2021	Individual Service Strategy - 1Y	Successful Completion	Jim Potts (DWG)

Page 1 of 1

Add Enrolled Service Printable Services Return

Youth Same Day Services

- Under the Youth title, there are several services that are considered ‘Same Day Services’.
- Meaning, when a Youth participant is enrolled in one of those services, the first time the service is recorded. Each subsequent time the service is provided for the same participant, the ‘Add Additional Episode’ feature as was covered under slides 46 – 50 in this presentation should be added.

Youth Same Day Services

- Comprehensive Guidance and Counseling
- Labor Market Information (LMI)
- Job Search Activities and Assistance (STAFF)
- Referred to Employment/ Placement Assistance (STAFF Assisted)
- Vocational Exploration
- Group Workforce Research/Workshops/Job Clubs
- Career Planning (Case Management)
- Development of an Individual Service Strategy (ISS)

WIOA Youth Services

- A key to understand about Youth Services, just as under the Adult and Dislocated Worker titles, if a service is not actively being provided, it should not remain open.
- This goes back to the same guidance that there is a maximum of 10-day data lag of a service entry into IWDS.
- Service records must be closed/ended with an indication of completion status (successful or unsuccessful) within ten (10) days of learning of the completion of the service through regular thirty (30) day contact.



WIOA Follow-Up Services

Follow-Up Requirements for individuals who have been served under the WIOA program:

- Follow-Up is **REQUIRED** for all Youth.
 - Follow-up for Youth must take place for twelve (12) months after services are completed.
- Follow-Up is **REQUIRED** for Adults and Dislocated Workers who obtain 'Unsubsidized Employment'.
 - Follow-up for adult and dislocated worker clients are for twelve months after they obtain unsubsidized employment.
- Follow-Up **SHOULD BE MADE AVAILABLE** for Adults and Dislocated Workers who do not obtain unsubsidized employment upon completion of traditional WIOA services.



WIOA Follow-Up Services

Federal guidance requires states and local areas to set policy on Follow-Up Services:

- OET ePolicy Chapter 4: Section 2.4 - Follow-Up Services – provides overall feedback for Adult, Dislocated Worker and Youth follow-up related to two-way communication; including telephone conversations, in person or via e-mail (or other social media) could be considered two-way communication as part of follow-up.
 - This policy guidance states that sending a letter or leaving a voicemail for a participant **is not** an acceptable two-way communication to be recorded as follow-up.

WIOA Follow-Up Services

Other guidance in OET ePolicy Chapter 4: Section 2.4 - Follow-Up Services:

- The follow-up service activity must be recorded in Illinois Workforce Development System (IWDS) throughout the required twelve (12) months.
 - Service of Follow-Up is opened, but the actual follow-up actions are recorded within the Case Note section or on the exit control panel of the participant's record.

WIOA Follow-Up Services

- All services for the Adult participant on the adjacent screen print have been completed.
- This participant met all objectives and the overall goal outlined in the IEP of obtaining employment as an over the road truck driver.
- All WIOA services have been closed and there are no additional services planned.
- The last recorded service was closed on 3/1/2021.

Services
[BSDTool WIOA](#) [Application Summary](#)
 SSN: 0515 App LWA:20 App Date:05/15/2020

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Start Date	End Date	Service Provided	Status	Created By
02/24/2021	02/24/2021	Job Search Activities & Assistance (STAFF) - 1A	Successful Completion	Jim Potts (DWG)
02/22/2021	02/22/2021	Workforce Preparation Activities - 1A	Successful Completion	Jim Potts (DWG)
02/22/2021	02/22/2021	SS - Other Supportive Services - 1A	Successful Completion	Jim Potts (DWG)
01/06/2021	02/12/2021	Occupational Skills Training - 1A	Successful Completion	Jim Potts (DWG)
06/10/2020	12/01/2020	Adult Basic Education (ABE) (Developmental Education) - 1A	Successful Completion	Jim Potts (DWG)
05/15/2020	01/05/2021	Comprehensive and Specialized Assessment - 1A	Successful Completion	Jim Potts (DWG)
05/15/2020	02/25/2021	Development of an IEP - 1A	Successful Completion	Jim Potts (DWG)
05/15/2020	03/01/2021	Career Planning (Case Management) - 1A	Successful Completion	Jim Potts (DWG)

Page 1 of 1

WIOA Follow-Up Services

- The actual start date of follow-up could be recorded on the date the last service had ended, or you could open on the day after the last service had ended.
- For this example, follow-up began on the date the last service ended.

Select Activity

[BSDTool WIOA](#) [Application Summary](#)

SSN: 0515 App LWA:20 App Date:05/15/2020

Title: 1A

Service Level: Career Services

*Activity:

Start Date: 03/01/2021 ←

< Back Next >

Cancel

WIOA Follow-Up Services

The Follow-up service should remain open until follow-up is completed.

Add Required Activity Information
[BSDTool WIOA](#) [Application Summary](#)
SSN: 0515 App LWA:20 App Date:05/15/2020

Created By: Jim Potts (DWG)
Title: 1A
Service Level: Career Services
Activity: Follow-up Services
*Grant: 19681020-Land of Lincoln Workforce Alliance
Provider: Testing20-20 Illinois workNet Center *
Start Date: 03/01/2021
End Date:
*Current Status: Open
*Supports Bridge Program?: No
Comments:



WIOA Follow-Up Services

The actions taken as part of follow-up should be recorded in the case notes and when appropriate, within IWDS screens such as the exit control panel.

Informational Message:
The record has been added.

Services
[BSDTool WIOA](#) [Application Summary](#)
 SSN: 0515 App LWA:20 App Date:05/15/2020

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Start Date	End Date	Service Provided	Status	Created By
03/01/2021		Follow-up Services - 1A	Open	Jim Potts (DWG)
02/24/2021	02/24/2021	Job Search Activities & Assistance (STAFF) - 1A	Successful Completion	Jim Potts (DWG)
02/22/2021	02/22/2021	Workforce Preparation Activities - 1A	Successful Completion	Jim Potts (DWG)
02/22/2021	02/22/2021	SS - Other Supportive Services - 1A	Successful Completion	Jim Potts (DWG)
01/06/2021	02/12/2021	Occupational Skills Training - 1A	Successful Completion	Jim Potts (DWG)
06/10/2020	12/01/2020	Adult Basic Education (ABE) (Developmental Education) - 1A	Successful Completion	Jim Potts (DWG)
05/15/2020	01/05/2021	Comprehensive and Specialized Assessment - 1A	Successful Completion	Jim Potts (DWG)
05/15/2020	02/25/2021	Development of an IEP - 1A	Successful Completion	Jim Potts (DWG)
05/15/2020	03/01/2021	Career Planning (Case Management) - 1A	Successful Completion	Jim Potts (DWG)

Page 1 of 1

WIOA Follow-Up Services

Case notes should explain what has occurred during follow-up.

Add Case Note

[BSDTool WIOA](#) [Application Summary](#)
Staff Name: Jim Potts (DWG)

*Contact Date:
 Program:
 *Note Category:
 *Confidential:
 *Note Subject:
 *Case Note:

List Case Notes

[BSDTool WIOA](#) [Application Summary](#)
 SSN: 0515 App LWA:20 App Date:05/15/2020

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	Contact Date	Note Category	Program	Note Subject	Updated By	Created
View	03/01/2021	Post-Exit Follow-Up	WIOA	Opening Follow-Up	Jim Potts (DWG)	2021-03-26 10:02:29.329
View	03/01/2021	Case Note Supporting Same Day Service	WIOA	Obtained Employment at J.B. Hunt	Jim Potts (DWG)	2021-03-26 09:38:43.265
View	02/25/2021	Case Note Supporting Same Day Service	WIOA	Sent job lead for an interview	Jim Potts (DWG)	2021-03-26 09:26:07.202
View	02/25/2021	Case Note Supporting Same Day Service	WIOA	Updated IEP	Jim Potts (DWG)	2021-03-26 09:25:29.113
View	02/22/2021	Case Note Supporting Same Day Service	WIOA	Obtained CDL at Illinois DMV	Jim Potts (DWG)	2021-03-26 09:03:15.932

Closing Follow-Up Services

Remember once twelve months of follow-up has been completed, Career Planners will want to go back into the actual service of follow-up and close the follow-up service that was opened when follow-up began.

Edit Required Activity Information
[Becky Hanes1D](#) [Application Summary](#)

SSN: 2873 App LWA:15 App Date:08/06/2015 Exit Date:06/30/2019

Created By: Jim Potts (Training)
Date Created: 08/21/2019
Last Updated By: Jim Potts (Training)
Last Updated: 08/21/2019
Title: 1D
Service Level: Career Services
Activity: Follow-up Services

*Grant: 19681015-United Workforce Development Board aka Career Link ▼

Provider: *3027-00 Workforce Network

Start Date: 07/01/2019
End Date: 7/1/2020 ←

*Current Status: Successful Completion ▼ ←

*Supports Bridge Program?: No ▼

Comments:

Additional Info

Save Cancel

Recap

This concludes the presentation on WIOA Services:

- During this presentation we discussed the various type of WIOA services.
 - Requirements to have the plan to support the WIOA Services that a participant would/is enrolled.
 - Recording and closing services in a timely manner.
 - Steps and processes within IWDS for enrolling clients in various services.



Questions

If you have questions related to this presentation, we can address those now, or you can feel free to contact me at James.potts@Illinois.gov or you can phone me at (217) 558-2456.