



CHICAGO COOK
WORKFORCE PARTNERSHIP

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Service Matrix Changes Adult & Dislocated Worker

WEBINAR GUIDANCE AND TIPS

- ❖ This webinar is for LWIA 7 only.
- ❖ Your lines are muted.
- ❖ Please post all questions and comments in question box.
- ❖ This session is being recorded.
- ❖ The recording and power point will be posted on the help desk.

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Objectives

- Review Service Matrix: Where can you find it?
- Identify Categories & Types of services
- Review Service Changes: What are they?
- How to use the Matrix for daily activities
- Q & A



What is the Service Matrix?

- A document that houses all services and definitions available for use under WIOA guidance.
- A reference tool for clear, concise up to date service information
- Separated by different categories of services:
 - Adult & Dislocated Worker Career
 - Adult & Dislocated Worker Training
 - Youth Program Elements
 - Supportive Services
 - Follow Up



Service Matrix Changes

- The updated Service Matrix can be found on the Help Desk:
<https://workforceboard.zendesk.com/hc/en-us/articles/360050548012>
 - ✓ Each tab is color coded by Category of service
 - ✓ Active Service column is now called Extends 90-day Exit Window
 - ✓ Pre-Requisite column indicates what rules apply to each service
 - ✓ Performance Measure column has been updated to include all applicable measures

No longer a
column called
Active Service

Includes
Acronym of
Performance
Measures

Adult & Dislocated Worker Career Services - 2/24/2023

The services appear in the Career Connect alphabetically by Activity Title.

Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requisite	WIOA Performance Measure(s) ³
205	Development of an IEP (Same Day Service)	Yes	Yes	The Individual Employment Plan (IEP) is jointly developed by the participant and career planner. The plan is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve the employment and career goals, including providing information on eligible providers of training services and career pathways to attain career objectives. The IEP is the basic instrument for the LWIAs to document the appropriateness of the decisions made about the combination of services for the participant, including referrals to other programs for specified activities.	Completed Assessment	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)

General Rules for Service Entry

- Document every service provided within 10 days of it being given.
- Ensure the services are outlined in the Individual Employment Plan (IEP).
- Case Notes are used to describe and document the service provided.
- Do not use Career Planning (Case Management) service to capture another service listed in the Matrix. Use the Service Matrix to determine what to select before entering in Career Connect.
- There is no required sequence or order for Adult/Dislocated Worker services. However, we have a suggested order of services. Please refer to our *Career Coaching: Customer Flow Webinar Series* on our Help Desk. <https://workforceboard.zendesk.com/hc/en-us/articles/360060897212->

Five Categories of Services

1. Basic Career Staff Assisted

2. Individualized Career

3. Training

4. Supportive

5. Follow-Up

Three Types of Services

Within the 5 Categories of services there are three general Types of services.

1. **Enrollment Services**

- Triggers participation
 - Makes the individual a WIOA Participant (registrant)
 - Service record extends participation by resetting the clock on the “90-Day Rule” for exit.
- Extends 90 Day Exit Window
 - Each additional enrollment service begins a new 90-Day window to program exit date
 - Extends participation period and exit
 - Related to 90-Day Exit rule compliance
 - Column on Matrix – “Extends 90-Day Exit Window”

Types of Services continued

2. Non-Enrollment Services and Activities

- Services or activities that continue supporting the education or employment plan, but don't trigger participation or extend the exit date.
 - Non-Enrolling Tracking Services
 - ✓ Some are unique to Career Connect
 - ✓ These services are used to transmit & track data across systems and are not considered true services.

3. Same-Day Services

- Staff-assisted services and activities that are completed in one day
- The service or activity start and end on the “same day.”
- Service **cannot** be left open.
- Case notes are **required** for all Same-Day services.



Basic Career Staff Assisted: *Definition*

➤ Basic Career Staff Assisted: Definition

- Services that prompt enrollment in WIOA and are provided with significant staff assistance.
- Include services such as eligibility, initial skill assessments, labor exchange services, provision of information on program and services and program referrals.
- Services can include:
 - ✓ Referred to Employment/Placement
 - ✓ Job Search Activities and Assistance
 - ✓ Shared Placement
 - ✓ UI Filing Information
 - ✓ FAFSA/Financial Aid Eligibility Assistance
 - ✓ See Service Matrix for full list



Basic Career Staff Assisted: *Rules*

➤ Basic Career Staff Assisted: Rules

- They are all Same-day services
- Once opened the participant will fall into WIOA Performance
- They can be opened at anytime throughout program participation

Adult & Dislocated Worker Career Services - 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requisite	WIOA Performance Measure(s) ³
Basic Career Services (Staff Assisted)						
210	Referred to Employment/Placement Assistance (STAFF Assisted)-Same Day Service	Yes	Yes	Individualized assistance by a career planner who matches a participant with existing job openings which are related to the customer's prior job experience, career goals and occupational interests, or with the training program the individual has completed.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
211	Job Search Activities and Assistance (STAFF Assisted)-Same Day Service	Yes	Yes	Activity in which the Career Planner assists customers in a one-on-one setting in the job search process including locating relevant job openings, resume writing, and setting up interviews with potential employers.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
232	Shared Placement Service (Same Day Service)	Yes	Yes	A shared placement occurs when one agency places another agency's WIOA participant in a job. By adding this service both the owning/case managing agency and the agency that does the job placement get credit for the placement. Only enter a Shared Placement service when: --the participant has actually been placed in a job and employment is verified, and --the participant was placed by your agency or center, but is receiving WIOA career coaching from another Partnership-funded WIOA agency. For more information see the Shared Placement procedure on the Career Connect Help Desk. Note: This service transfers to IWDS as "Referred to Employment/Placement Assistance"	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
239	UI Filing Information (STAFF ASSISTED)-Same Day Service	Yes	Yes	Provision of information and assistance regarding filing claims for unemployment compensation, by which the one-stop must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
240	FASFA/Financial Aid Eligibility Assistance (STAFF ASSISTED)-Same Day Service	Yes	Yes	Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)

Individualized Career Services *Definition*

➤ Individualized Career Services: Definition

- Must be provided to participants after Agency staff determine that such services are required to retain or obtain employment.
- Generally, these services involve significant staff time and *customization to each individual's need*.
- Services can include:
 - ✓ Specialized Assessments
 - ✓ Development of an IEP
 - ✓ Career Exploration (**New! service name**)
 - ✓ Workforce Preparation Activities
 - ✓ Job Readiness Training
 - ✓ Job Club
 - ✓ See Service Matrix for full list



Individualized Career Services *Rules*

➤ Individualized Career Services: Rules

- Before entering some of these services an IEP must have been created with participant **and** the 205-Develop IEP Service **must** be entered. The requirements for each service are listed in the Pre-Requisite column of the matrix.
- Must be identified in the Individual Employment Plan (IEP)
- Some are Same-Day; some may be left open
- Once entered the participant will fall into WIOA Performance

Adult & Dislocated Worker Career Services - 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requisite	WIOA Performance Measure(s) ³
201	Group Workforce Research/Workshops/Job Clubs (Same Day Service)	Yes	Yes	Workshops - Facilitator-led, organized workshop intended to provide participants with knowledge of labor market information, skills assessment, applications/resume preparation, interviewing techniques, and job search techniques to enhance their search for employment. Job Clubs - Provide resource materials on job openings and job search skills as well as descriptive materials about vocations and the skills sets that are required to successfully gain employment. They may also provide group activities which support customers in conducting an independent job search.	Must Have IEP (Activity Code 205) before entering this activity.	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
202	Career Planning (Case Management)- Same Day Service	Yes	Yes	WIOA Section 3(8) defines career planning as the provision of a client-centered approach in the delivery of services, designed to prepare and coordinate comprehensive employment plans, such as service strategies, for participants to ensure access to necessary workforce investment activities and supportive services, using, where feasible, computer-based technologies; and to provide job, education, and career counseling during program participation and after job placement. Career planners are to provide one-on-one staff assistance and career counseling. These activities are to assess the areas in which WIOA participants have the greatest needs and assist them in determining whether or not their existing skills are in demand in the local economy. If marketable skills are found to exist, the client should be directed to activities which assist him/her in obtaining job search skills or locating potential employment opportunities. If marketable skills do not exist, the client should receive information about skills which are in demand, the training needed to obtain employment in these occupations, and training assistance which can be provided by the WIOA program.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
205	Development of an IEP (Same Day Service)	Yes	Yes	The Individual Employment Plan (IEP) is jointly developed by the participant and career planner. The plan is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve the employment and career goals, including providing information on eligible providers of training services and career pathways to attain career objectives. The IEP is the basic instrument for the LWIAs to document the appropriateness of the decisions made about the combination of services for the participant, including referrals to other programs for specified activities.	Completed Assessment	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)

Updated! Individualized Career Service

Service 224: Career Exploration (Same Day Service)

This service was formally called Workforce / LMI / Targeted Occupational Profiles service.

Career Exploration includes providing information on state and local labor market conditions; industries, occupations, and characteristics of the workforce; area business identified skills needs; employer wage and the benefit trends; short-and long term industry and occupational projections; dynamics information such as workforce availability; business turnover rates; job creation; and job identification of high growth and high demand industries.

Labor market information publications just given to job seekers in person or by mail should not be counted in this category

Non-Enrolling Tracking Services

➤ The services listed below are used to transmit & track data across systems and are not considered true services.

- Unique to Career Connect

- ✓ Co-Enrolled in IWDS (Check IWDS Before Closing / Exiting)
- ✓ Adult Initial ITA Request (Same Day Service)
- ✓ DW Initial ITA Request (Same Day Service)
- ✓ Adult ITA Exception (Same Day Service)
- ✓ DW ITA Exception (Same Day Service)
- ✓ CTA RPM Referral** (Same Day Service)

** Only applies to Northside AJC, Westside AJC & KRA/Chatham

Adult & Dislocated Worker Career Services - 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	English	Pre-Requisite	WIOA Performance Measure(s) ³
Non-Enrolling Tracking Services (these are not true services, but are used to transmit & track data across systems).						
226	Co-enrolled in IWDS (Check IWDS Before Closing / Exiting)	No	No	Use this service to indicate that a customer is co-enrolled in a statewide program or TAA in IWDS. The service start date should equal the co-enrollment registration date. The service end date should equal the Exit date. See the Co-enrollment Procedure on the Help Desk for full procedures on when to co-enroll and how to track co-enrollment (https://workforceboard.zendesk.com/hc/en-us/articles/115003924311).	A. Must Have IEP (Activity Code 205) before entering this activity.	N/A
231	Adult Initial ITA Request (Same Day Service)	No	Yes	Use this service to initiate the ITA process when ITAs are open for the Adult customer group. The service will trigger a data transfer to the Bright Horizons EdAssist System (BHES), and you will be able to complete the ITA Application in BHES the next business day. Note: This service does not transmit to IWDS.	Completed Assessment IEP (Activity Code 205)	N/A
235	DW Initial ITA Request (Same Day Service)	No	Yes	Use this service to initiate the ITA process when ITAs are open for the Dislocated Worker (DW) customer group. The service will trigger a data transfer to the Bright Horizons EdAssist System (BHES), and you will be able to complete the ITA Application in BHES the next business day. Note: This service does not transmit to IWDS.	Completed Assessment IEP (Activity Code 205)	N/A

Career Connect

- All the services we just covered, Basic and Individualized Career Services are listed in Career Connect as “Career Services.”

Grant:


WIOA or Non-WIOA Partner Program: ☐ Yes, service is a WIOA or Non-WIOA Partner Program.


*** Service Activity Level:**

*** Activity Code:**

[\[Select Activity Code \]](#)

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

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

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

Career Connect System Changes

- Services will now be displayed in alphabetical order when selecting them in the Career Connect.
 - This may already be happening in the live site. So don't be surprised when you see this!
- A description has been added to some services in Career Connect
- Changes will officially go in the system on **Friday, 2/24/2023**

Menu	Activity Code	Activity Title	Description	Provider Type
WIOA or Non-WIOA Partner Program:	205	Develop IEP -Same Day Service	Same Day Service: must be opened & closed on the same day with the same Actual Begin Date & Actual End Date. A case note is required.	PS - Office Services
* Service Activity Level:				
* Activity Code:				
[Select]	327	PARTNERSHIP PROGRAM REQUIRED: Training Paid by Non-WIOA Title I Funds	Service DOES NOT extend the 90-day exit window. SPECIAL INSTRUCTIONS: Record a Partner Program for this service by clicking on "Yes, service is a WIOA or Non-WIOA Partner Program" & selecting Title II, Title III, Title IV, Other Public Sector Training, Private Sector Training, or Apprenticeship Expansion. Add a case note with additional details of the partner program.	PS - Office Services
* An actual begin date or a projected be				
Projected Begin Date:				
Actual Begin Date:				
* Projected End Date:				
Service Provided				

Training Services *Definition*

➤ Training Services: Definition

- Training services, when determined appropriate, must be provided either through an Individual Training Account (ITA) or through a training contract.
 - ✓ IEP's must be in place
 - ✓ Career Exploration must have taken place
 - ✓ Participants must have completed research on 2 or more approved schools
 - ✓ Please see our ITA Policies & Procedures on the Help Desk for specific guidance <https://workforceboard.zendesk.com/hc/en-us/articles/360020502172->
- **On-the-Job Training (OJT):**
 - ✓ Must have an IEP
 - ✓ Must have an ISTEP
 - ✓ See our OJT Policy on our Help Desk <https://workforceboard.zendesk.com/hc/en-us/articles/115001817051>
 - ✓ See special instructions for entering the OJT services correctly, including the planned wage: <https://workforceboard.zendesk.com/hc/en-us/articles/4424187557261>

Training Services *Rules*

➤ Training Services: Rules

- All A/D Training Services require the following to be completed **before** a Training service can be entered:
 - ✓ IEP service
 - ✓ Training Certification (WIOA Application State Specific Tab)
 - ✓ Tests (on the EFL for MSG bar) where applicable
- **Performance Measures (non-OJT)**
 - ✓ Credential Measure & Measurable Skill Gains
 - ✓ ALL successful training program completions should result in a post-secondary Credential & MSG.
- **Rules & Performance Measures for OJT**
 - ✓ Require the IEP **and** the ISTEP services to be entered before the OJT service can be entered.
 - ✓ Measurable Skill Gains
 - ✓ ALL successful OJT's should result in an MSG but **not a Credential**

Training Services Rules

➤ Training Services: Rules (cont.)

- Training services are NOT Same-Day services
 - ✓ When these services are opened, they should remain open until it is confirmed the participant has completed.
- End Date AND Completion Statuses
 - ✓ **Successful** = Record when participant completes the service or training.
 - ✓ **Unsuccessful** = Record when the participant withdrew or did not complete the service or training program

Adult & Dislocated Worker Training Services 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requisite	Performance Measures ³
300	Occupational Skills Training (ITA)	Yes	No	<p>Make sure to set the Career Connect "Is this Service Paid by an ITA" to "Yes" when this service is ITA-funded.</p> <p>An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels. Such training must be specified in the participants Individual Employment Plan (IEP) and be of sufficient duration to impart needed skills and lead to a recognized postsecondary credential. Such programs should be outcome orientated and focused on an occupational goal specified in the IEP. Training program must be on the Illinois ETPL.</p>	Must have IEP (Activity Code 205) before entering this activity.	<p>Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)</p> <p>MSG & Credential (AMSG/DMSG ACAR/DCAR)</p>
301	On-The-Job Training (OJT) - Private Sector	Yes	No	<p>See the OJT Service Procedure on the Help Desk for detailed instructions of how to enter the OJT service, including the planned wages: https://workforceboard.zendesk.com/hc/en-us/articles/4424187557261</p> <p>OJT is provided under a contract with an employer or registered apprenticeship program sponsor in the private non-profit or private sector. Through the OJT contract, occupational training is provided for the WIOA participant in exchange for the reimbursement, typically up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and supervision related to the training. LWIAs must consider skill requirements of the occupation, participant's academic and occupational skill, work experience and the IEP. An OJT contract must be limited to the period of time required for participant to become proficient in the training related occupation.</p> <p>Do NOT record an OJT service if provided as part of an Apprenticeship Program or Pre-Apprenticeship Program. Instead record as the appropriate apprenticeship/pre-apprenticeship service code and follow the instructions for that service to indicate that it's an OJT.</p>	<p>Must have IEP (Activity Code 205) before entering this activity.</p> <p>Must have Completed ISTEP (Activity Code 221) before entering this activity.</p>	<p>Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)</p> <p>MSG (AMSG/DMSG)</p>

Training Services

- Training Services can include:
 - ✓ On-the-Job Training (OJT) – Private Sector
 - ✓ On-the-Job Training (OJT) – Public Sector (**NEW!**)
 - ✓ Occupational Skills Training
 - ✓ Career Pathway Training
 - ✓ Planned Gap/Holding
 - ✓ These services will appear in Career Connect under the Training Service Activity Level services
 - ✓ Please see Service Matrix for complete list


Grant: None Selected ▼

WIOA or Non-WIOA Partner Program: ☐ Yes, service is a WIOA or Non-WIOA Partner Program.

*** Service Activity Level:** Training Services ▼

*** Activity Code:** None Selected
Training Services
Career Services
[\[Select Activity Code\]](#)

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

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

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

New! Training Service

Service 302: Public Sector On-the-Job Training (OJT)

OJT is provided under a contract with an employer or registered apprenticeship program sponsor in the public sector. Through the OJT contract, occupational training is provided for the WIOA participant in exchange for the reimbursement, typically up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and supervision related to the training. LWIAs must consider skill requirements of the occupation, participant's academic and occupational skill, work experience and the ISS. An OJT contract must be limited to the period of time required for participant to become proficient in the training related occupation.

Do NOT record an OJT service if provided as part of an Apprenticeship Program. Instead record as the appropriate apprenticeship service code and follow the instructions for that service to indicate that it's an OJT.

Updated! Training Service

Service 304: WIOA Title 1B Funded Adult Education w/ Training

Under WIOA sec 134(c)(3)(D)(x), Title I adult and dislocated worker funds may provide adult education and literacy activities only if they are provided concurrently or in combination with one or more of the following training services:

- a) Occupational skills training, including training for nontraditional employment;
- b) OJT;
- c) Incumbent worker training (as described in §§ 680.780, 680.790, 680.800, 680.810, and 680.820);
- d) Programs that combined workplace training and related instruction, which may include cooperative education programs;
- e) Training programs operated by the private sector;
- f) Skill upgrading and retraining; or
- g) Entrepreneurial training

Service 304 Continued

Service 304: WIOA Title 1B Funded Adult Education w/ Training

The Integrated Career & Academic Preparation System (ICAPS), is the implementation of the IETs (Integrated Education and Training) model in Illinois. IETs are a service approach that provides adult education and literacy activities (including English Language acquisition (ELA) activities concurrently and contextually with workforce preparation activities and workforce training for the purpose of educational and career advancement. ICAPS aims to provide an integrated pathway in Career and Technical Education (CTE) for college credit and/or program certificate opportunities for Adult Education and Literacy (AEL) students that lack basic skills. ICAPS/IET career pathway programs must be approved by the Illinois Community College Board (ICCB) to ensure the three components of integrated education and training are provided concurrently as well as Contextually as required.

ICAPS programs must be on the Illinois ETPL.

NOTE: This is not stand-alone adult education and literacy activities. Since WIOA Title I cannot fund stand-alone adult education and literacy activities. (e.g., adult education, high-school equivalency, etc.), career planners must refer the participant to a Title II Adult Education provider for those services.

ADULT EDUCATION WITH WIOA TITLE IB FUNDS MAY NOT BE OFFERED AS A STAND-ALONE SERVICE.

Training Partner Program Services

➤ The services listed below are Training Services that require a Partner Program. There is a check box in Career Connect that must be completed in order to ensure this service is entered correctly.

- Service 315: Registered Apprenticeship Program (RAP)
- Service 332: Non-Registered Apprenticeship Program
- Service 327: Training Paid by Non-WIOA Title I Funds

WIOA or Non-WIOA Partner Program: ☒ Yes, service is a WIOA or Non-WIOA Partner Program.

*** Select Partner:** None Selected

*** Service Activity Level:** None Selected

*** Activity Code:** WIOA Title II-Adult Education & Family Literacy

*** An actual begin date or a projected begin date:** WIOA Title III-Wagner-Peyser Employment Services

Projected Begin Date: WIOA Title IV-Vocational Rehabilitation Services

Actual Begin Date: Other Public Sector Training

Projected End Date: Private Sector Training

Actual End Date: Apprenticeship Expansion

Projected Start Date: Apprenticeship/Pre-Apprenticeship is Private OJT

Actual Start Date: Apprenticeship/Pre-Apprenticeship is Public OJT

Projected Completion Date: RAP ONLY-Apprenticeship is Skill Upgrade

Actual Completion Date:

Training Partner Program Services

Service 327: PARTNER PROGRAM REQUIRED: Training Paid by Non-WIOA Title I Funds

A Partner Program must be recorded for this service by clicking on the "Yes, service is a WIOA or Non-WIOA Partner Program" check box and selecting Title II, Title III, Title IV, Other Public Sector Training, Private Sector Training, or Apprenticeship Expansion. Provide additional details of the partner program in a case note.

This activity should only be recorded in specific circumstances as a mechanism to indicate when a WIOA participant is co-enrolled in another program and is being provided a training service that is NOT funded by WIOA Title I and is also receiving WIOA Title IB-funded individualized career services. The career planner must provide justification for the need for wrap-around WIOA services to meet the participant's employment goals that are outlined in the Individual Employment Plan (IEP). The career planner must also indicate the program providing the training service in the case notes as well as document the Partner Program (as described above). When a participant is co-enrolled, the following must be coordinated across the two programs: Individual Employment Plan (IEP); Services; and Exit.

This type of training will NOT flag customers for inclusion in the Training measures unless they are provided with an additional WIOA funded training service. This does not extend the exit period.

Updated! Service Name & Definition

Service 001: X-Planned Gap/Holding

A participant may be placed in a gap in service when a situation arises that will temporarily prevent program participation for greater than ninety (90) consecutive calendar days with a specific date on which the participant will return for planned services. A planned gap is more than ninety (90) days but fewer than one hundred and eighty (180) days. The gap in service will provide time for the participant to address barriers to continued participation without exiting the program. All gaps in service must be referenced in case notes detailing the reason for the gap in service. A participant who has an active planned gap activity entered will not exit after ninety (90) days, unless the participant fails to return to services by the end of the planned gap. If a participatory service does not occur within fourteen (14) days of the last day of a planned gap and ninety (90) or more days have passed since the last participatory service, an exit will be calculated as of the date of the individual's last participatory service. Eligibility does not need to be re-determined at the end of the gap in service.

Service 001 Continued

Service 001: X-Planned Gap/Holding (cont.)

- A planning gap occurs when there is:
 - ✓ A delay before the beginning of training;
 - ✓ A health/medical condition, or providing care for a family member with a health/medical condition; or
 - ✓ A temporary move from the area that prevents the individual from participation in services, including National Guard or other related military service.

Examples of instances that may require a planned gap include the following: a participant has a medical procedure that requires the participant to be out of class for a certain period of time, but the participant expects to return to class on a particular date; or a participant must leave class to care for a family member but will return to class on a particular date.

Please note: In order to be placed on Hold, participant must have at least one Individualized Career Service other than Career Planning, Assessment, IEP or a Training Service. No other services may be opened when a participant is on Hold

Supportive Services *Definition*

➤ Supportive Services:

- Services necessary to enable an individual to successfully participant in WIOA career and training services.
 - ✓ Must be in support of a WIOA career or training service
 - ✓ Must be documented in IEPs and recorded in Career Connect
 - ✓ Adult/Dislocated participants are not eligible for supportive services during follow up
 - ✓ Non-Enrolling Activity: Does not trigger enrollment or re-set 90-Day Exit clock
 - ✓ An enrollment service being provided on the same day as a supportive services should be documented **first** then the supportive service record can be added.
 - ✓ Supportive services are all Same-Day services and cannot be left open.
 - ✓ A case note must be entered to justify the need.

Supportive Services

➤ Supportive Services can include:

- ✓ Child/Dependent Care
- ✓ Transportation
- ✓ Tools/Equipment
- ✓ Uniforms
- ✓ Legal Aid (**NEW!**)
- ✓ Other Supportive Services

Supportive Services - Adult, Dislocated Worker & Youth - 2/24/2023				
Supportive Services: Must have a least one active, enrolling service before opening any supportive service.				
Adult/DW Activity Code	Activity Title	Extends 90-day exit Window ¹	Same Day Service ²	Definition
180	Support Service - Child/Dependent Care (Same Day Service)	No	Yes	Services provided to a customer to permit his/her participation in a WIOA-funded career service or training program or their retention of a job gained through WIOA participation by ensuring that children or other dependents of the customer are properly cared for during the period of time a customer is in training or at work. Assistance may include child/adult day care or after school programs which are in-home or outside the home. Childcare usually includes supervision and shelter and may include meals and transportation.
181	Support Service - Transportation Assistance (Same Day Service)	No	Yes	Services provided to a customer to permit his/her participation in a WIOA-funded career service or training program or retention of a job gained through WIOA participation by ensuring that he or she has the ability to make the trip from his or her residence to the training or employment site (and childcare site, if necessary) and back. Assistance may include the cost of public transportation or mileage reimbursement if the customer is using his or her vehicle for transportation purposes.
182	Support Service - Medical (Same Day Service)	No	Yes	Services provided to a customer to permit his/her participation in a WIOA-funded career service or training program or retain employment that was gained through WIOA participation by ensuring that needed health services are made available. Health care services may include, but are not limited to: <ul style="list-style-type: none"> a) Physical examination required for participation in training or as a condition of employment; b) Provision of eyeglasses; c) Essential dental services; d) Reasonable accommodations for individuals with disabilities; and e) Other essential health care that is required by the program.

New! Supportive Service

Service 192: Supportive Services Legal Aid

➤ Legal Aid can include the following:

- a) Expunging or sealing old criminal records;
- b) Obtaining, reinstating revoked or suspended driver's licenses;
- c) Assisting with securing occupational licenses when a criminal record is a discretionary obstacle;
- d) Untangling outstanding court debt issues;
- e) Negotiating wage garnishments, such as for child support orders;
- f) Securing certificates of rehabilitation for the formerly incarcerated;
- g) Stabilizing lives by preventing illegal evictions, resolving credit report problems, or filing for domestic violence restraining orders; and
- h) Assisting veterans with accessing healthcare, education grants, and housing services.

Please Note: WIOA cannot pay for associated fines.

This service will not be available in CC until 3/3.

Follow Up Services *Definition*

➤ Follow Up Services: Definition

- Must be provided as appropriate to WIOA Adult and Dislocated Workers who are placed in unsubsidized employment for up to twelve (12) months following the **date of employment**
 - ✓ Must be documented in IEP's and recorded in Career Connect
 - ✓ Are provided to help individuals retain employment, earn wage gains, or advance within their occupation.
 - ✓ Please see our Follow Up Policy on the Help Desk. LINK:
<https://workforceboard.zendesk.com/hc/en-us/articles/360003795372->

Follow-Up Services - 2/24/2023

Activity Code	Activity Title	Same Day Service	Definition
F11	Follow-Up Services	No	<p>Adult and Dislocated Workers</p> <p>Follow-up services must be provided, as appropriate, for participants in adult or dislocated worker workforce activities <u>who are placed in unsubsidized employment</u>, for up to 12 months after the first day of employment per the Follow-Up Services policy. Follow-up services must meet the needs of the participant and may include, but is not limited to the following:</p> <ol style="list-style-type: none"> Counseling individuals about the workplace; Contacting individuals or employers to verify employment; Contacting individuals or employers to help secure better paying jobs, additional career planning, and counseling for the individual; Assisting individuals and employers in resolving work-related problems; Connecting individuals to peer support groups; Providing individuals with information about additional educational or employment opportunities; and Providing individuals with referrals to other community resources. <p>When an Adult or Dislocated Worker customer obtains unsubsidized employment while still receiving traditional WIOA services, there cannot be a Follow-Up Service activity opened in the system. In this instance, documenting the follow-up should be included and recorded during routine, two-way communication between the Career Planner and the customer. Only when the individual completes services can a Career Planner open a Follow-Up Service and enter a case note of the action in the system.</p> <p>In instances where an Adult and/or Dislocated Worker participant does not obtain unsubsidized employment upon completion of traditional WIOA services, follow-up services should be made available, but is not required unless they are placed in unsubsidized employment. (Because the date of exit is retroactive to the last date of service, follow-up services may begin immediately following the last date of service if it is expected that the participant will not receive any future services other than follow-up services.)</p>

Follow Up Services *Rules*

➤ Follow Up Services: Rules

- When an Adult or Dislocated Worker does not obtain unsubsidized employment upon completion of traditional WIOA services, Follow-Up services should be made available throughout the 12-month follow up period
 - ✓ If these individuals decline follow-up services, it must be documented in the case notes.
 - ✓ Follow-Up service is left open until completed

➤ **Please Note:** Participants in this category may opt out of receiving Follow-Up services after being offered the information to receive them. This decision must be documented in the case notes.



Follow Up Services

➤ **Service F11: Follow Up Services Adult and DW**

Follow-up services must be provided, as appropriate, for participants in adult or dislocated worker workforce activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment per the Follow-Up Services policy. Follow-up services must meet the needs of the participant and may include, but is not limited to the following:

- a) Counseling individuals about the workplace;
- b) Contacting individuals or employers to verify employment;
- c) Contacting individuals or employers to help secure better paying jobs, additional career planning, and counseling for the individual;
- d) Assisting individuals and employers in resolving work-related problems;
- e) Connecting individuals to peer support groups;
- f) Providing individuals with information about additional educational or employment opportunities; and
- g) Providing individuals with referrals to other community resources.

Follow Up Services

➤ **Service F11: Follow Up Services Adult and DW (cont.)**

When an Adult or Dislocated Worker participant obtains unsubsidized employment while still receiving traditional WIOA services, there cannot be a Follow-Up Service activity opened in Career Connect. In this instance, documenting the follow-up should be included and recorded during routine, two-way communication between the Career Planner and the participant. Only when the individual completes services can a Career Planner open a Follow-Up Service and enter a case note of the action in Career Connect.

In instances where an Adult and/or Dislocated Worker participant does not obtain unsubsidized employment upon completion of traditional WIOA services, follow-up services should be made available, but is not required unless they are placed in unsubsidized employment. (Because the date of exit is retroactive to the last date of service, follow-up services may begin immediately following the last date of service if it is expected that the participant will not receive any future services other than follow-up services.)

Follow Up Services

Example 1:

If customer states that they are working and there are no services scheduled, then you can go ahead and enter case notes labeled “Follow Up after employment.” Then once employment is confirmed and entered in the system, please exit customer.

Example 2:

If you find out during a Monthly Contact call that customer has been working for a month or two, please confirm the employment and enter in system. If no other services are needed, please exit customer. In this case, there will not be “Follow Up after employment” case notes since customer has been working for the last 2 months.

Example 3:

Customer states they found employment and are in need of supportive services. In this case, no “Follow up after employment” case note should be entered until customer has received the last supportive service. The supportive service must be given in conjunction with another Career Service (Basic or Individualized). Adult/Dislocated customers cannot receive supportive services after exit.

Reminders regarding Exiting

- Use the Exit Checklist on our Help Desk.
<https://workforceboard.zendesk.com/hc/en-us/articles/360001375152->
- If customer is working and is not in need of any further services, prepare for exit.
- Do not hold on to customers who are working and not in need of services. If you are not able to confirm employment with using traditional methods, please use the Affidavit of Employment for exit.
- If customer is working and you are not able to confirm employment at all, please still exit as “Other Services complete.” The wages will reflect a positive impact in the performance measures.
- If no services have been provided to customer in 90 days, they **must** be exited.
- Customer should be offered Follow Up services and it should be case noted if the customer accepted or not.

Re-Cap of Service Changes/Updates

Old Service Name		New Service Name
<i>Service 001: Holding</i>	➤➤	X-Planned Gap/Holding
<i>Service 224: Workforce Info /LMI / Targeted Occupational Profiles (STAFF ASSISTED)-Same Day Service</i>	➤➤	Career Exploration (Same Day Service)
<i>Service 304: Adult Basic Education (ABE) (Development Education)</i>	➤➤	WIOA Title 1B Funded Adult Education w/ Training

****Service codes will remain the same****

Service vs. Case Note

➤ Service

- Is provided when staff uses information to determine a course of action or next steps for a participant.
- Something “actionable” must take place between the participant and the Career Coach.
- When an action is taking place with participant, refer to the Service Matrix to ensure the correct service is recorded.

➤ Case Note

- For example, you held a brief conversation to verify employment or ensure everything is going well with the participant, and no requests are made of you for more services.
- You are NOT providing a service.
- General Case Note is the method of documentation.
- Individual cases should be reviewed for exit when no service is provided.

Up Next!

Mandatory Youth Service Matrix Training

Career Connect WIOA Youth Service Part 1

Wednesday, March 1, 2023 (2:30 pm – 4:00 pm):

Registration Link:

<https://attendee.gotowebinar.com/register/4781622566285843551>

Career Connect WIOA Youth Service Part 2

Wednesday March 8, 2023 (2:30 pm – 4:00pm)

Registration Link:

<https://attendee.gotowebinar.com/register/4326599574735437151>

Prior to these webinars, please watch the recording of the **2/9 DCEO WIOA Title IB Service Matrix Overview** training available at: <https://ilworkforceacademy.com/workforce-wednesday-webinars-2023/>



Questions?





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