CHICAGO COOK WORKFORCE PARTNERSHIP
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Closure/Exit Procedure

Overview

All WIOA **enrolled** Adult, Dislocated Worker and Youth participants without an active service for 90 days **MUST** be exited from WIOA. Youth entered in Career Connect after 3/9/2023 who only receive non-enrolling services must be "exited" if they do not receive an enrolling service within 45 days of WIOA eligibility. (See the "Exiting a Non-Enrolled Youth" section below for special instructions on exiting these Youth.) Agencies must monitor their case load and run the Days Since Last Active Service report monthly to ensure timely exits of participants.

This procedure covers:

- Pre-closure/exit requirements
- Creating the Closure/Exit for **enrolled** Adults, Dislocated Workers, and Youth
- Exiting a Non-Enrolled Youth
- Exiting a participant who has not had a service for over 120-days
- Clousre/Exit reports – including the Days Since Last Active Service report
- List of valid exit reasons

UPATED! Prior to Closure/Exit

Please make sure the following steps are complete **BEFORE** Creating a Closure in Career Connect. (We recommend using the Exit Checklist available for download at: https://workforceboard.zendesk.com/hc/en-us/articles/360001375152.)

1. Close the IEP/ISS Plan (see the IEP/ISS procedure for further guidance).
2. Make sure all services:
   - Are recorded
   - Have an actual begin date **and** an actual end date
   - Have a provider
   - For Adults/Dislocated Workers, no support services may be dated after the end date of the last active service. (Active services have a check mark in the EE (Extends Exit) column of the Service Activities summary screen.)
   - For Youth, no Cash Incentive services may be dated after the end date of the last active service. (Active services have a check mark in the EE (Extends Exit) column of the Service Activities summary screen.)
   - If needed, please make service corrections or submit corrections to the Help Desk **before** completing the Closure.
3. Add any credentials earned during the program to the WIOA Credential bar (see Credential Procedure for further guidance).
4. Add any Measurable Skills Gains (MSG) attained during the to the WIOA Measurable Skills Gain bar or, for literacy/numeracy gains, to the Educational Functioning Level for Measurable Skills Gain bar. (See Measurable Skills Gains Procedure for further guidance.)

5. Add any unsubsidized or OJT Employment entered during the program or at Closure to the WIOA Employment bar (see In Program Employment Tracking Procedure for further guidance)

Create the Closure only **after** items above have been completed.

UPDATED! Entering the Closure for Enrolled Adults, Dislocated Workers, and Youth

Step 1: Once you are "Assisting" the customer, go to *Staff Profiles > Case Management > Programs*. Then click on the (+) next to the WIOA Application to expand the section.

Step 2: Click on the Closure (+) to expand the section and click on "Create Closure".

Step 3: In the General Information section:

- Select your Office Location.
- The Closure Date will automatically set to the end date of the last active service.
- Select "Neither condition applies" for the Accountability Closure/Exit status.

Step 4: Choose the appropriate Case Closure Exit reason*.

- A list is available in Appendix A below. Note that some reasons may only be used for Youth participants and are labeled as "YOUTH ONLY".
- **Do not use the "YOUTH ONLY-No Enrolling Services"** exit reason unless the Youth meets the criteria specified in the "Exiting a Non-Enrolled Youth" section below.
- If a Youth is both employed and enrolled in post-secondary education at Closure, select "YOUTH ONLY-Attending Post Secondary School / College at Exit (Pos)" as the Closure Reason. The employment will be counted by entering the job as explained below.

***Note:** If your customer has gone over 120 days with out a service you will **not** be able to select a Case Closure Exit reason. See the 120-Day Exit Instructions below **and** contact your Regional Manager / Program Coordinator for further guidance on how to Close/Exit any customers in this situation.

Step 5: In the Outcome Information section, please select and verify the School Status at Exit. This is required for Youth participants, but should also be entered for Adult and Dislocated Workers if known.

Step 6: For Youth, staff must also select at "Youth Placement at Exit" to record any non-unsubsidized employment placements. (Skip this step for Adult/DW.)

- If a Youth was placed in post-secondary education, advanced training, military service, or a qualified apprenticeship, record it here along with the date of the placement and the documentation used to verify the placement.
- If this is not applicable, select "None of the Above". (No date or verification is required.)

Step 7: The question "Entered Employment" must be answered regardless of the exit reason for the participant.

Step 8: If the participant is exiting with employment set "Entered Employment" to "Yes" and then click the Add Employer link to add the Closure/Exit employment. (If the participant is not working at exit, skip to the next step.)

- The job at Closure must be completed and verified.
- The job start date must be **before** the closure date or in the same calendar quarter as the closure. Remember, the Closure date automatically sets to the end date of the last active WIOA service.

To select a job that has already been added to the Employment bar, click on the Search Individual Employment History and you can select the employment at Closure. You can also add a new job here. This screen works just like any other screen that allows you to add employment. This employment must be Verified.

Step 9: Click on "Add a new Case Note" to case note the Closure/Exit. The case note should include:

- Exit reason
- Exit Date
- A summary of the customer's outcomes (for example, completed training, certifications earned, employment, or other goals achieved).
- If the outcome is negative the note should explain why the customer did not complete services and why the agency decided to exit him/her.
- For neutral exits indicate how and when the agency learned about the situation that necessitated a neutral exiter.

Staff Information

[Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject
2993306	11/06/2019	Exited - Youth in Post-Secondary

		◄ ◄ Page	1 ▼ of 1 ► ►

Step 10: Once the case note has been entered and saved, click on "SAVE" in the Closure screen to complete and save the Closure. Creating the Closure automatically Exits the customer from WIOA as long as the Closure is completed within 120 days of the last active service end date*.

After saving, you can go back into the Closure screen and click the "Print Preview" button at the bottom to print the Closure information and save it in the customer's paper file.
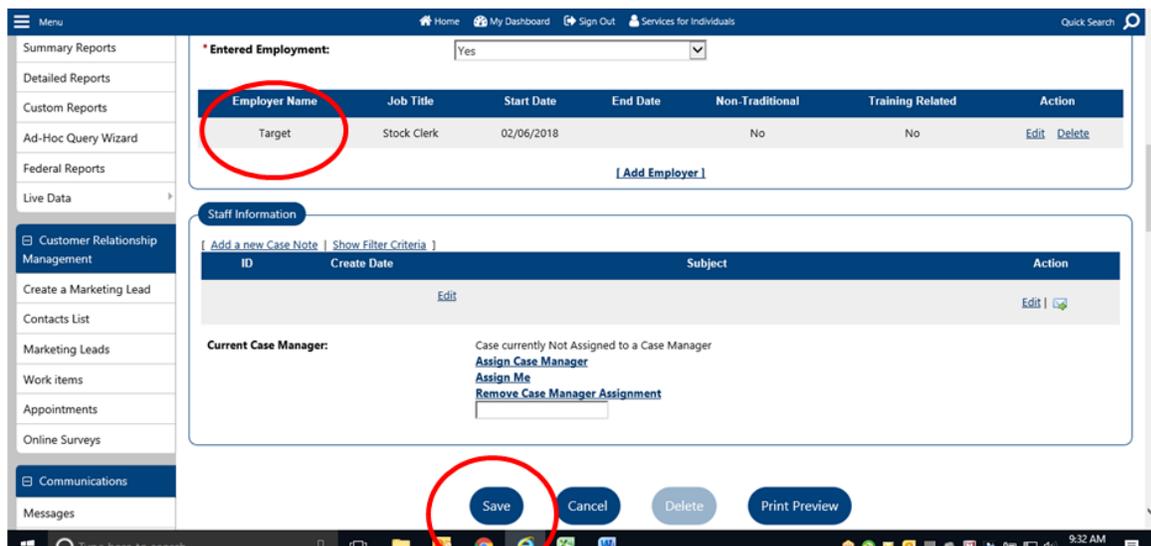
Now the participant has been Closed/Exited and a Closure and Exit/Outcome date will appear*.
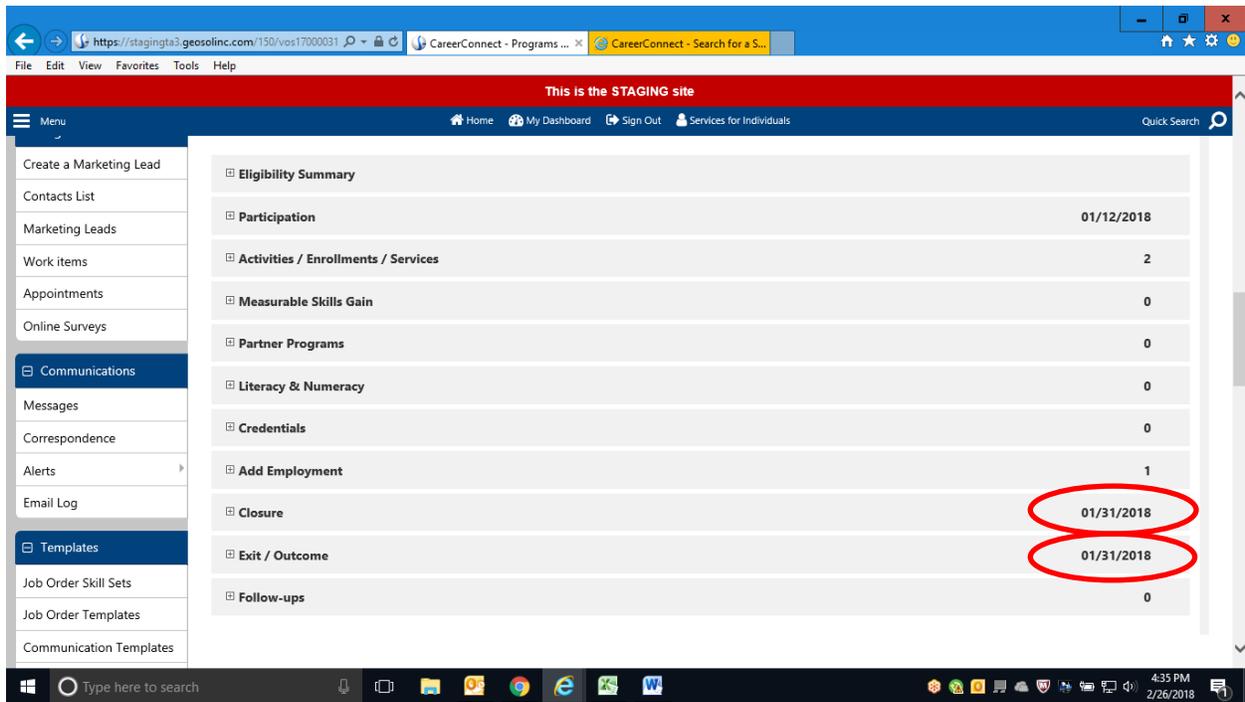
Note: *If you complete the Closure, and the Exit/Outcome date does not display, see the 120-Day Exit instructions below **and** contact your Program Coordinator or Regional Manager immediately, as the customer is not fully exited.*

Step 11: Once **both** the Closure **and** Exit records are completed, open up a Follow-up service if you will be providing follow-up services, in accordance with the [Follow-up Policy](#). To add a Follow-up service, go to the WIOA Activities / Enrollments / Services bar and click "Create Activity/Enrollment/Service".

Select one of the available Follow-up (F-code) services. The service Actual Start Date should be the day after the Closure/Exit Date. The service should remain open for the duration of the follow-up period, up to 12 months after Employment start (Adult/DW) or 12 months after Exit (Youth).

Enrollment Information

Grant:	None Selected ▼
WIOA or Non-WIOA Partner Program:	☐ **Yes**, service is a WIOA or Non-WIOA Partner Program.
* Service Activity Level:	Academic Learning Services (Youth) ▼
* Activity Code:	F11 Other Follow Up Service, not classified (490)
	[Select Activity Code]
Projected Begin Date:	[ ] 📅 Today
Actual Begin Date:	02/01/2018 📅 Today
* Projected End Date:	02/01/2019 📅 Today
Any classes attended through Distance Learning:	○ Yes ⦿ No
Participant has been issued an ITA and the ITA will pay for this service:	No ▼

NEW! Exiting a Non-Enrolled Youth

Youth added in Career Connect **after 3/9/2023** who only receive non-enrolling activities (468, 469 & 470) must be exited if they do not receive an enrolling service (one of the 14 Youth Elements) **within 45 days of the WIOA Eligibility date**. Although they are not enrolled, exiting is required to remove them from your agency's caseload.

Youth without any Enrolling services will have all blank circles in the PE (Triggers Program Entry) column of the WIOA Service Activity Summary screen (as show below). In reports, they will not have any Youth Element services (services with a "YE #" in the service name). They will also show up on the "Days Since Last Active Service" report as long as all the non-enrolling services are closed.

The non-enrolling activities do not trigger "Program Entry" →

PE ⓘ	EE ⓘ	Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
◐	○	C	468 - Youth Comprehensive and Specialized Assessments (Same Day Service) 🏆 Business And Career Services Inc.	W	Youth	N/A	12/02/2022	12/02/2022	12/02/2022 Successful Completion
◐	○	C	469 - Development of Integrated Service Strategy (ISS)-Same Day Service Business And Career Services Inc.	W	Youth	N/A	12/05/2022	12/05/2022	12/05/2022 Successful Completion
◐	○	C	470 - Youth Career Planning/Case Management (Same Day Service)	W	Youth	N/A	12/06/2022	12/06/2022	12/06/2022 Successful Completion

In this scenario, you must create the Closure as described in the previous section and use the Closure/Exit reason of "YOUTH ONLY-No Enrolling Services". Please contact the Help Desk or your Program Coordinator / Regional Manager if you are unsure whether to use this exit reason.

NEW! 120-Day Exits

Agencies must run the Days Since Last Active Service report monthly to manage their case loads and ensure that Participants are exited if they do not receive an active service for 90+ days. (See **Exit Reports** section below.) If a participant goes 120+ days without an active service, Career Connect will lock the Closure Exit Reason on the Closure screen and will not automatically create the Exit with the Closure. **These exits must be submitted to The Partnership & the State for review and exit in accordance with the procedures below**. Agencies who regularly have participants on the "120-Day" list may be subject to additional monitoring that could lead to disciplinary actions.

To request the exit of a participant who has gone without a service for 120+ Days:

1. Complete the steps in the **Prior to Closure/Exit** section above.

2. Complete the Career Connect Closure screen – you will not be allowed to select an exit reason, but you must complete all other required fields.

3. Complete the **120 Day Exit Agency Request Form** available for download at: https://workforceboard.zendesk.com/hc/en-us/articles/360001375152:
    *   Submit one form for all participants over 120 days who need to be exited.
    *   If you select one of the Employment exit reasons, you must include the job on the Closure screen and the job start date must be prior to the Closure date or in the same calendar quarter as the Closure date. **If these requirements are not met, The Partnership will change the exit reason to a negative exit reason.** (You can make it up in performance if the participant is working in the 2nd and/or 4th quarter after exit.)

UPDATED! Closure/Exit Reports

The following Career Connect reports can help you manage your case load, determine who needs to be exited, and see your Closure/Exit outcomes. Instructions for running each of these reports can be found in WIOA Case Management tab of the Reports Guide available at: https://workforceboard.zendesk.com/hc/en-us/articles/6503046470541.

Report Title (Matches the Report Title in the Guide)	Report Description	Important Instructions
Days Since Last Active Service	• Report indicates the number of days since an active service was entered for each active participant. • Report includes cases that have a Closure but are not exited – see 120-Day Exit Procedures above. • Any participant with no services for 90+ days must be exited (unless they are on hold or co-enrolled in IWDS LWIA 90) • Any participant with no services for 120+ days must be exited in accordance with the 120-Day Exit Procedures above.	• The "Exclude Activities Excluded from Soft Exit" filter must be set to "Yes" • Participants with open same-day services, will **not** show up on this report. See the "Open Same Day Services" report instructions in the guide and close any same-day services before running this Days Since Last Active Service report. • Participants on hold or co-enrolled in IWDS will show up in this report. Use the On-line Characteristics report to find those customers. • If a participant has a Closure date in this report, they are closed, but **not exited**. Submit this participant on the 120-Day Exit list immediately.
Case Closure	Report provides the information from the Case Closure screen.	
Exit Summary Report	Provides a summary of number of exiters by exit reason.	This report is helpful for tallying positive and total exits for your monthly reports to The Partnership.
Exited Cases Report	List of exiters, including Exit Date & exit reason	If a case is closed, but not exited, the participant will not show up on this report. See the 120-Day Exit Procedures above.

UPDATED! APPENDIX A – Exit Reasons
Valid WIOA Title I Exit Reasons as of 3/10/2022

EXIT REASON	DESCRIPTION
Positive Exit Reasons	
• Entered Unsubsidized Employment (Pos)	Use when a participant has entered unsubsidized employment prior to the Closure/Exit date or in the same calendar quarter as the Closure/Exit Date. The job must be added on the Closure screen.
• Entered Supplemental Employment (Pos)	Use this exit reason for participants placed in employment that will not be included in wage data. For example, independent contractors our out-of-state placements. This exit reason can remind you to track and add supplemental employment data in follow-up. The job must be added on the Closure screen.
• **NEW!** Military Service/Employment (Pos)	Use this exit reason if the participant is placed in military service / employment at exit. The job must be added on the Closure screen.
• YOUTH ONLY – Attending Post Secondary School/College at Exit (Pos)	This exit reason is only valid for **enrolled** Youth participants. Use this for Youth who are attending post-secondary school or college at exit. If a Youth is attending school **and** employed at exit, use this exit reason, and add the unsubsidized employment to the Closure to document both the employment and education outcomes. Make sure to set the Youth School Status at Exit to "Attending, Post High School" and the Youth Placement at Exit to "Entered post-secondary Education" as well.
Neutral Exit Reasons	
• Institutionalized / Incarcerated (Neutral) • Health/Medical (Neutral) • Deceased (Neutral) • Reservist called to Active Duty (Neutral) • **YOUTH ONLY** – Foster Care (Neutral)	These exit reasons must be documented in the case notes. Participants exited with one of these exit reasons are removed from WIOA performance.
• **NEW! YOUTH ONLY** – No Enrolling Services (Neutral)	This exit reason is only for Youth enrolled after 3/9/2023 who had non-enrolling services as explained in the "Exiting a non-enrolling Youth" above. Since the Youth was never enrolled, this exit just removes the participant from the case load.
Negative Exit Reasons	
• Attained Credential/Diploma/Certificate (Neg) • Cannot Locate (Neg) • Other, Services Completed (Neg) • Other, Services Not Completed (Neg) • Retirement (Neg) • **YOUTH ONLY** – Attained GED/Equivalency Diploma (Neg) • **YOUTH ONLY** – Attained High School Diploma (Neg) • **YOUTH ONLY** – Attending Secondary (High School) at Exit (Neg)	Participants who have not had an active WIOA service for 90 days, and do not meet the criteria for a positive or neutral exit must be exited negatively using the most applicable negative exit reason. Note that several negative exit reasons are only valid for Youth participants. If a negatively exited participant is working in the 2nd and/or 4th quarter after exit, the participant will be picked up as a positive in the WIOA employment performance measures.

Closure/Exit