



## Recording Shared Placements

### Overview

The purpose of Shared Placements is to record and track when an agency places another agency's WIOA customer in a job. In such cases both the owning/case managing agency and the agency that does the job placement get credit for the placement. These procedures explain how to record shared placements in Career Connect and how to run a shared placement report.

### When to Enter a Shared Placement

Enter a shared placement in Career Connect **only when**:

- The customer **has actually been placed in a job** and employment has been verified.
- The customer was **placed by your Agency or Center** but is receiving WIOA career coaching services from another Partnership WIOA-funded Agency.

In the example below, the Arlington Heights Workforce Center is the "Office of Responsibility" and is conducting the day-to-day case management for this customer. Moraine Valley Community College provided the job placement and is the Placing Agency "Office/Provider".

Note in this example The Partnership would like to be clear that even if the Placing Agency **does not** have a youth contract and places a youth, the Placing Agency can still take credit for the placement on their monthly report on the Adult Program Exploding Plan under either the Placements or Shared Placements benchmarks.

### How to Enter a Shared Placement

1. The **Placing Agency/Office (Moraine Valley Community College, in this example)** should find the customer in Career Connect and go to Activities/Enrollments/Services bar. (Staff Profile > Case Management Profile > Programs > WIOA > Activities/Enrollments/Services)
2. Click on "Create Activity/Enrollment/Service" and add a **"Shared Placement – Same Day Service"** as follows.

3. In the General Information section, select the applicable customer group and select the **Placing Agency's Office** (in this case its **Moraine Valley Community College**).

**General Information**

<b>Participant User Name:</b>	PPURPLE7631
<b>Participant State ID:</b>	3917283
<b>Last Name, First Name MI:</b>	Prince, Purple
<b>Social Security Number:</b>	7631
<b>Address:</b>	69 W Washington Chicago, IL 60602
<b>Application Summary:</b>	<b>Program:</b> Title I - Workforce Development (WIOA) <b>Application Date:</b> 10/11/2017 <b>Earliest Eligibility Date:</b> 10/11/2017
<b>Participation Date:</b>	10/15/2017
<b>WIOA Youth Funding:</b>	Out Of School Youth
<b>* Customer Program Group:</b>	20 - Youth Customer program group cannot be modified.
<b>* LWDB:</b>	Chicago Cook Workforce Partnership LWDB cannot be modified.
<b>* Office Location:</b>	Moraine Valley Community College (7145) ▼

4. In the Enrollment Information section, select the appropriate Service Activity Level (Career Services for Adult/DW, Work Related Services for Youth) and the **Shared Placement** Activity Code (232 for Adult/DW, 424 for Youth).
5. The service **Actual Start Date** should be the **day the employment started**. Since this is a **Same Day Service**, the Projected End Date must be the same as the Actual Start Date.

**Enrollment Information**

Grant:

None Selected ▼

WIOA or Non-WIOA Partner Program:

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

\* Service Activity Level:

Work Related Services (Youth) ▼

\* Activity Code:

424 Shared Placement (Same Day Service)  
[\[ Select Activity Code \]](#)

Projected Begin Date:

Today

Actual Begin Date:

12/01/2018 Today

\* Projected End Date:

12/01/2018 Today

Any classes attended through Distance Learning:

☐ Yes ☒ No

Participant has been issued an ITA and the ITA will pay for this service:

No ▼

6. Complete the remainder of the screen, as applicable, and click “Next” to go to the Enrollment Service Provider Information page.


7. Select ***the Placing Agency (Moraine Valley Community College, in this example)*** as the Provider with the appropriate Provider Location. Choose Office Services for Services. Enter the Occupational Code. Lastly, select the Relationship number that ends in 200 – this is the Shared Placement Relationship number.

<b>Enrollment Summary:</b>	Enrollment ID: 288619 Username: PPURPLE7631 WIOA Application ID: 365962 Youth Funding: Out Of School Youth Activity Code: 424 - Shared Placement (Same Day Service) Activity Dates: 12/1/2018 - 12/1/2018
<b>* Provider:</b>	<input type="text" value="Moraine Valley Community College"/> <a href="#">[ Select Provider ]</a>
<b>* Service, Course or Contract:</b>	<input type="text" value="Office Services"/> <a href="#">[ Select Service, Course or Contract ]</a>
<b>Provider Locations:</b>	<input type="text" value="Moraine Valley Community College"/> <input type="text" value="9000 W. College Parkway"/> <input type="text" value="Palos Hills, IL 60465"/> <a href="#">[ Select Provider Locations ]</a>
<b>Provider Contacts:</b>	<input type="text" value="Darice Wright"/> <a href="#">[ Select Provider Contacts ]</a>
<b>* Occupational Training Code:</b>	<input type="text" value="43405100 - Customer Service Representatives"/> <a href="#">[ Occupational Training Code ]</a>
<b>Relationship Number:</b>	<input type="text" value="7145200"/>

8. Click "Next" to go to the service "Closure Information" screen and complete the screen as follows:
- Enter the "Last Activity Date" which must be the same as the Actual Start Date because this is a Same Day Service.
  - Select the "Completion Code"
  - For **Youth only**, select and verify the school status on the service end date.
  - Add and save a Case Note indicating that this is a shared placement in the subject line. The case note should include the name and address of the Employer where the customer was placed, the customer's position and wage and any other appropriate details. (See sample case note below.)
  - Click "Finish" to save the service.

**Closure Information**

**Enrollment Summary:** Enrollment ID: 288619  
Username: PPURPLE7631  
WIOA Application ID: 365962  
Youth Funding: Out Of School Youth  
Activity Code: 424 - Shared Placement (Same Day Service)  
Activity Dates: 12/1/2018 - 12/1/2018



**Last Activity Date:** 12/01/2018  Today

**Completion Code:** Successful Completion ▼

**School Status on Last Day of Service:** Not attending school; Secondary School Graduate or has a recognized equivalent ▼

**School Status Verification:** [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]  
✓ Verification documentation not required



**Case Notes:** [ [Add a new Case Note](#) | [Show Filter Criteria](#) ]

ID	Create Date	Subject	Action
2992675	02/05/2019	Shared Placement	 

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**Sample Case Note:** Confirmed with employer that Purple Prince, an Arlington Heights Workforce Center Out-of-School youth, started full-time employment as a Customer Service Delegate in the company's Call Center at \$14.50 per hour on 12/01/2018 at Oak Street Health, 12900 Violet Dr., Morado Island, IL. He attended a month's worth of on-boarding, employer-sponsored training from 12/02/18 to 01/07/19 and is currently handling a full load of calls with 25% supervision. Employer is pleased with his work and feels he is progressing appropriately.

9. This is how the service will display on the Activities/Enrollments/Services Screen:

Activities / Enrollments / Services								12
<a href="#">Create Activity / Enrollment / Service</a>								
Search: <input type="text"/>								
Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date	
	<a href="#">424 - Shared Placement (Same Day Service)</a> Moraine Valley Community College		Youth	N/A	12/01/2018	12/01/2018	<a href="#">12/01/2018</a> Successful Completion	

10. Go to the **WIOA Employment** bar and add the job, if it is not already there. (See the “In Program Employment Tracking Procedures” on the help desk site for step-by-step instructions.) The job start date should match the Shared Placement service Actual Start Date.

Add Employment				1
<a href="#">Add Employment</a>				
Search: <input type="text"/>				
Employer	Start/End Dates	City	Action	
Oak Street Health	12/01/2018 - Present	Morado Island	<a href="#">Edit</a> <a href="#">Delete</a>	

11. Be sure to communicate regularly with the customer’s Career Coach to keep them abreast of your job placement activity. Also, make sure to enter the service and job information as soon as you learn that the customer was placed, and **prior to the Agency of Responsibility exiting the customer**.

## Report

Run the following report to view your agency’s shared placements.

- Go to *Detailed Reports > Services Reports section > Services Provided Individuals > List*
- Set the report filters as follows:
  - Program: Title I – Workforce Development (WIOA)
  - Customer Group: select as needed; leave as “None Selected” for all customer groups
  - Office Location: select your Office
  - Activity/Service Code: Hold down the “Ctrl” key and select service codes 232 (Adult/DW) and 424 (youth)
  - Date Filter: Actual Begin Date
  - Date Range: select your desired date range
- Click “Run Report”

- If the “Shared Placement” was entered correctly, the “Office” and “Provider” columns will show the Office that provided the Shared Placement service. The “Office of Responsibility” will show the office that “owns” the participant.

**Services Provided Individuals - List Report**

Program: Title I - Workforce Development (WIOA)

Region/Lwia: Chicago Cook Workforce Partnership

Service Code: 232 - Shared Placement (Same Day Service), 424 - Shared Placement (Same Day Service)

Activity Completion Status: All, except void

Veteran Information From: Both

Date Field: Actual Begin Date

Start Date: 7/1/2018

End Date: 6/30/2019

UserName	State ID	Region / LWIA	Office	Office of Responsibility	First Name	Last Name	City, State, Country	Service	Completion Status	Provider
259430	3917283	Chicago Cook Workforce Partnership	Moraine Valley Community College (7145)	Arlington Heights Workforce Center (8100)	Purple	Prince	Chicago, IL US	424 - Shared Placement (Same Day Service)	Successful Completion	Moraine Valley Community College
Total Rows : 1										

**Note:** when the Shared Placement service transmits to IWDS it will show up as a “Job Referral & Placement” service.