Quarterly Follow-up Performance Outcomes Procedure

Overview

There are two components to tracking follow-up for WIOA customers:

1. Providing and tracking follow-up services (covered in the Follow-up Policy and in the Closure/Exit Procedure)
2. Reporting additional outcomes in the 4 quarters after exit.

This "Quarterly Follow-up Procedure" addresses #2 – tracking and entering additional participant outcomes in the 4 quarters after exit.

What Should be Tracked After Exit?

The following outcomes should be tracked after Exit both for WIOA Performance and to assess training outcomes and progress along a career pathway.

Outcome	Guidelines	Navigation
Credentials*	Credentials earned up to 1 year after exit, that are ***directly related to*** WIOA training or services.	Staff Profile > Case Management Profile > Programs > WIOA Credential bar
Measurable Skills Gain (MSG)*	MSGs earned after exit, but in the same program year that training / education services occurred. The MSG must be ***directly related to*** WIOA training / education services. This includes Lit/Num gains EFL gains.	Staff Profile > Case Management Profile > Programs > WIOA Measurable Skills Gain bar
Employment	Any employment attained or retained in the 4 quarters after Exit – ***especially the 2nd and 4th quarter after exit***. Adding supplemental data can help track training-related placements. Also, supplemental data is used for WIOA performance if no wage data is available.	Staff Profile > Case Management Profile > Programs > WIOA Follow-ups bar
Additional Placement Data	This includes entry into advanced training / education or military service. This data helps show advancement on a career pathway.	Staff Profile > Case Management Profile > Programs > WIOA Follow-ups bar

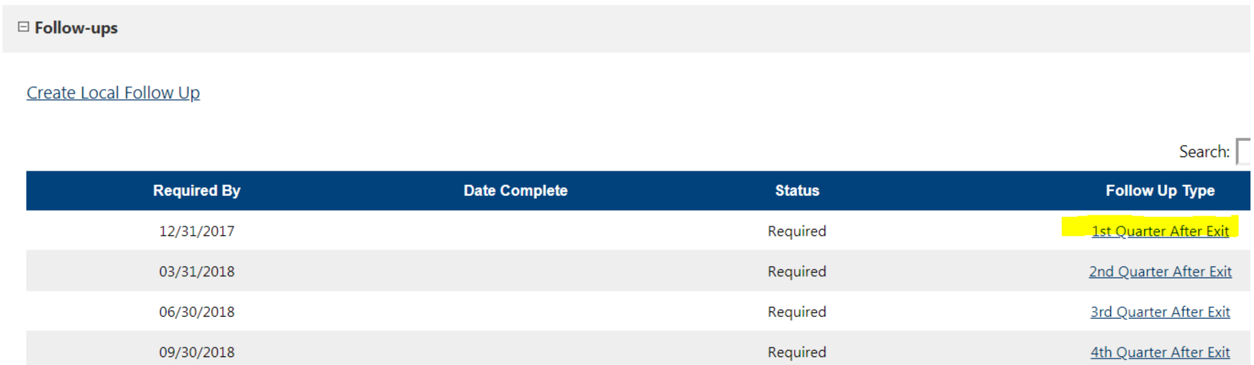
**Step-by-step procedures for Credentials and MSG are covered in separate procedures.*

Quarterly Follow-up Data Entry Procedures

1) Find your exited customer in Career Connect and go to *Staff Profile > Case Management Profile > Programs > WIOA Follow-ups*. Click on the appropriate follow-up quarter in the "Follow-up Type" column.

NOTE: Quarterly follow-up links do not display for customers exited with Neutral exit reasons.

NOTE: ***DO NOT*** *use the "Create Local Follow-up" link. Local follow-ups* ***do not*** *count toward performance.*


⊟ Follow-ups

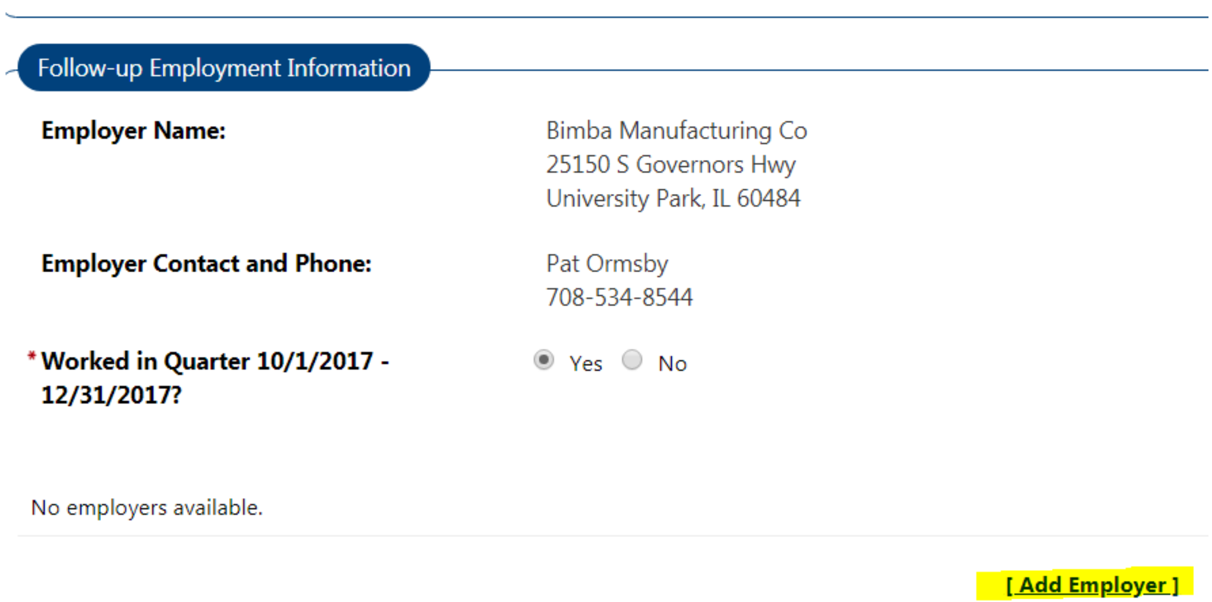
Create Local Follow Up

Search:

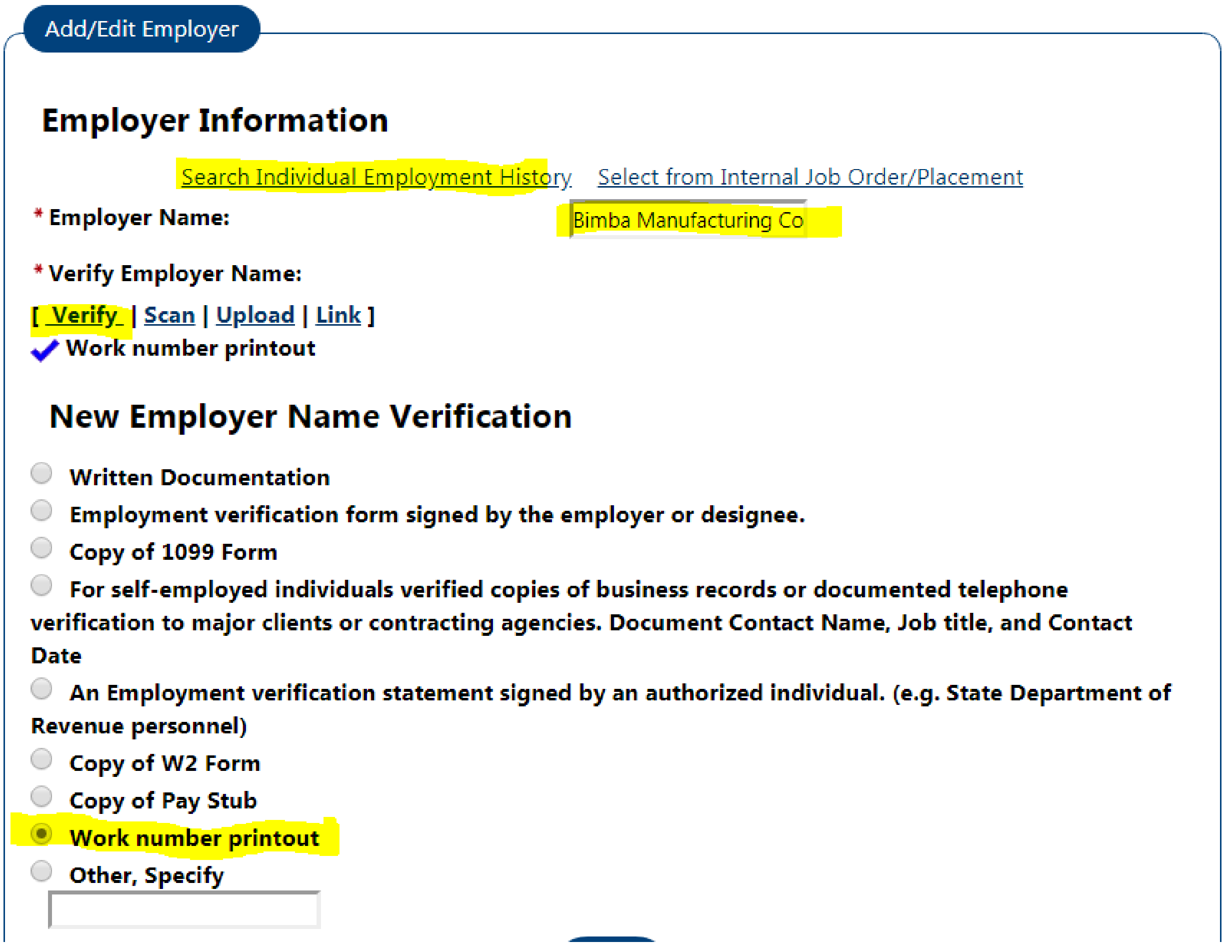
Required By	Date Complete	Status	Follow Up Type
12/31/2017		Required	1st Quarter After Exit
03/31/2018		Required	2nd Quarter After Exit
06/30/2018		Required	3rd Quarter After Exit
09/30/2018		Required	4th Quarter After Exit

2) **Contact Attempts Section:** ***This section is not required and should NOT be used.*** If you add a contact attempt, the Follow-up status will change to "pending".

3) **Follow-up Employment Information:**
   - Worked in Quarter – select "Yes" if the customer was working in the quarter or "No" if he/she was not working.
   - If "Yes" is selected, you must add the job details. If it is the first quarter with employment, or if the employment has changed since the last quarter, click the "Add Employer" link.

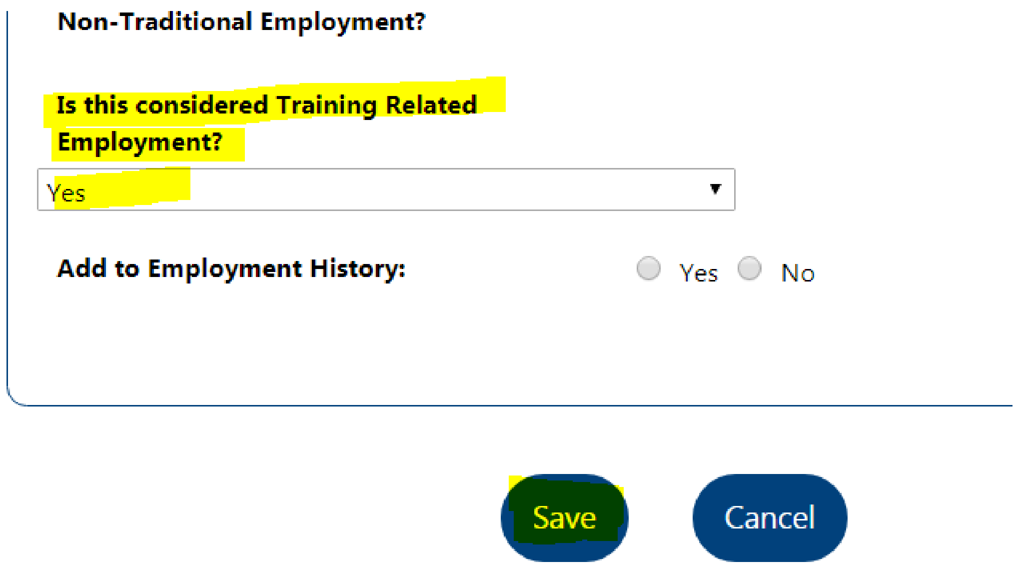


- The Add/Edit Employer screen will appear in a pop-up window. Complete all known data, including the “Verify Employer Name” and all other required fields. Click “Save” at the bottom of the screen.



TIP: If the job was added to the customer background, use the “Search Individual Employment History” link to find a pull in the job data. You will need to select the appropriate verification documentation under “Verify Employer Name” and complete any missing required fields.

- Be sure to review/update the “Is this considered Training Related Employment?” at the bottom of the screen. Career Connect will default this answer to “Yes” if the customer received training and if the ONET for the job matches the ONET for training. Staff may override the system setting if they can verify that the job is training-related.



Non-Traditional Employment?

Is this considered Training Related Employment?

Yes

Add to Employment History: Yes No

Save Cancel

- Once employment is added, the Quarterly Follow-up screen will update as follows:

Follow-up Employment Information

Employer Name: Bimba Manufacturing Co
25150 S Governors Hwy
University Park, IL 60484

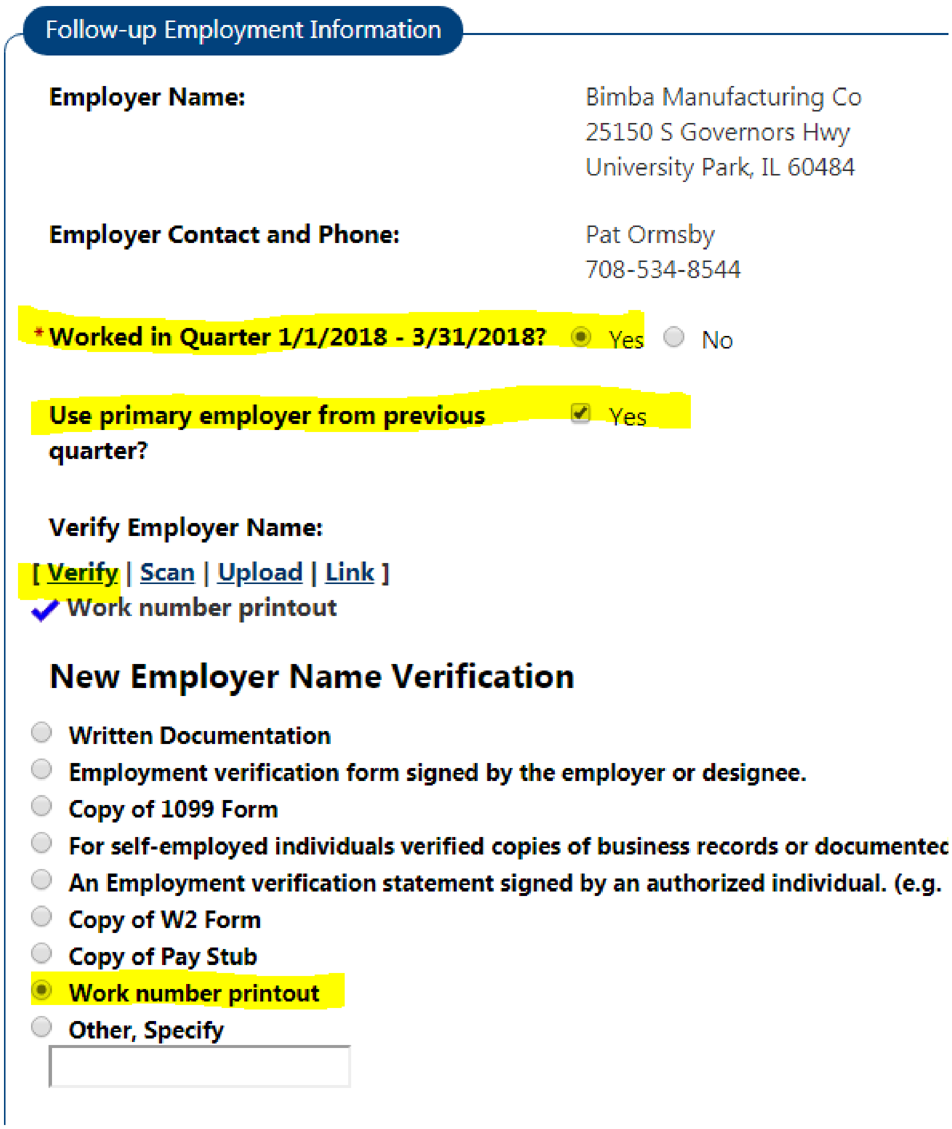
Employer Contact and Phone: Pat Ormsby
708-534-8544

* **Worked in Quarter 10/1/2017 - 12/31/2017?** Yes No

Qtr	Employer Name	Primary Employer	Job Title	Start Date	End Date	Non-Traditional	Training Related
1	Bimba Manufacturing Co	Yes	CNC Trainee	08/01/2017		No	Yes

[Add Employer]

- If the customer is working at the same job as in the last quarter you can you can use the data from the last quarter by:
  - Checking “Yes” for “Use primary employer from previous quarter”.
  - Verifying Employer Name



Follow-up Employment Information

Employer Name: Bimba Manufacturing Co
25150 S Governors Hwy
University Park, IL 60484

Employer Contact and Phone: Pat Ormsby
708-534-8544

* **Worked in Quarter 1/1/2018 - 3/31/2018?** Yes No

Use primary employer from previous quarter? Yes

Verify Employer Name:

[Verify | Scan | Upload | Link]

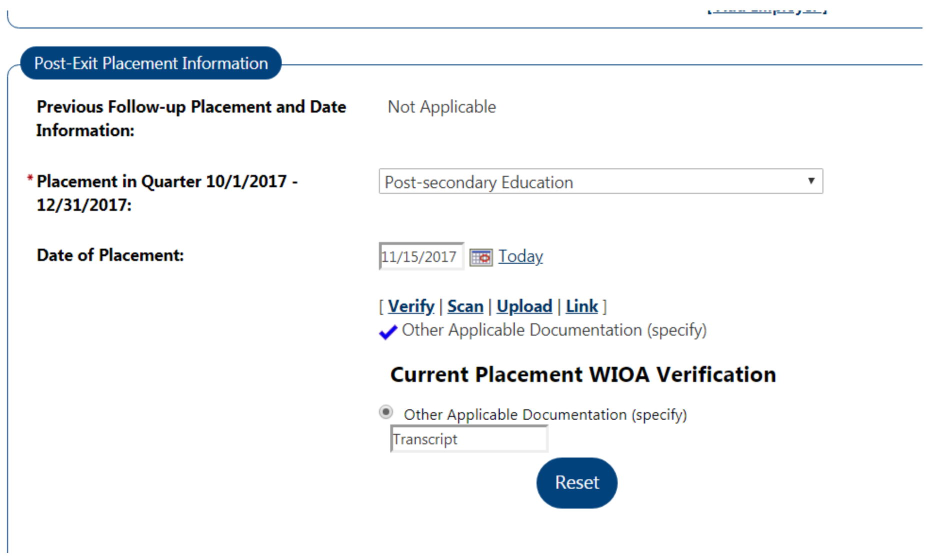
Work number printout

New Employer Name Verification

- Written Documentation
- Employment verification form signed by the employer or designee.
- Copy of 1099 Form
- For self-employed individuals verified copies of business records or documentec
- An Employment verification statement signed by an authorized individual. (e.g.
- Copy of W2 Form
- Copy of Pay Stub
- Work number printout
- Other, Specify

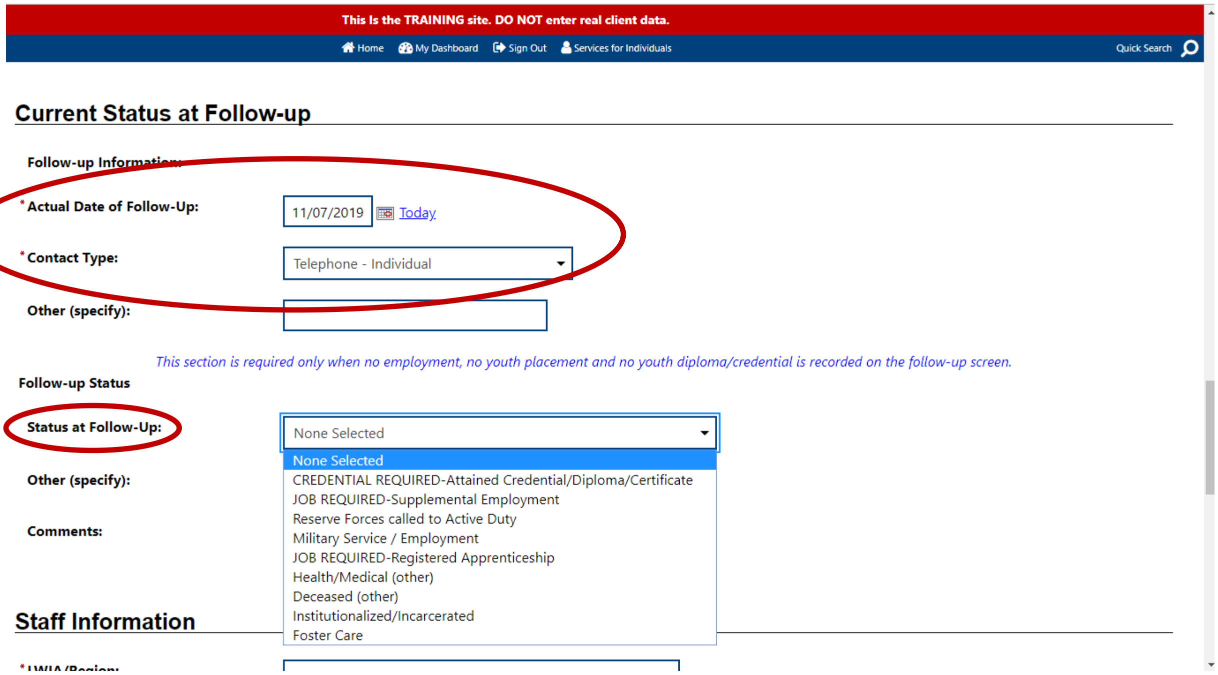
4) **Post-Exit Placement Information Section:** This section allows you to capture customer entry into education/training after Exit.

- Select the appropriate option for "Placement in Quarter". If none of the options apply, select "No Placement".
- If an option other than "No Placement" is selected, the "Date of Placement" and the "Verify" are required.



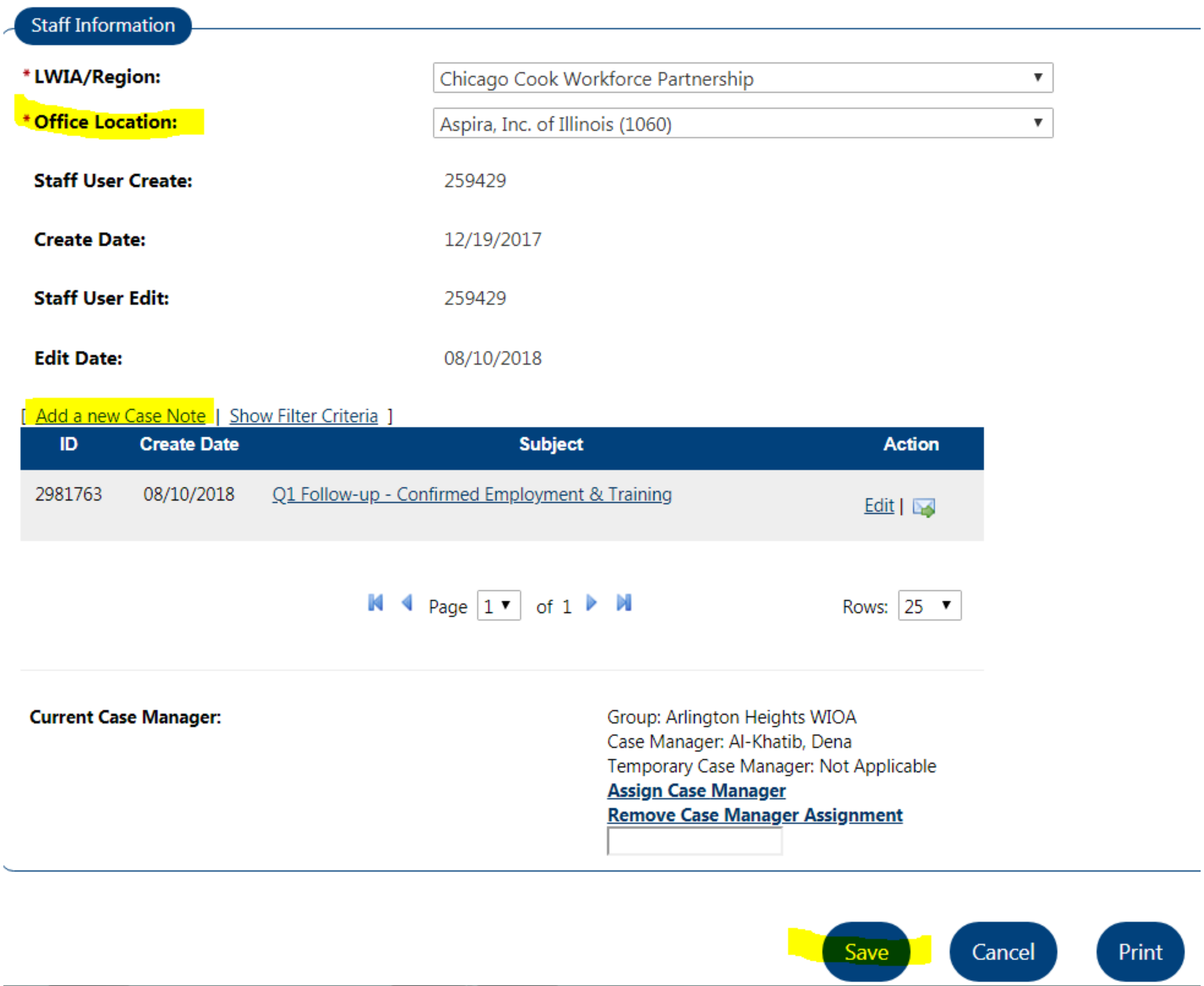
5) **Current Status at Follow-up Section:**

- "Actual Date of Follow-up" and "Contact Type" are required for all records.
- "Status at Follow-up" is only required if "Worked in Quarter" is "No" and "Placement in Quarter" is "No Placement". However, in November 2019 several new statuses were added that staff may want to use for tracking purposes, even if the customer is employed or is in training:
  - *CREDENTIAL REQUIRED-Attained Credential/Diploma/Certificate:* Use this if the customer earned a post-exit credential. **You must also enter the credential in the Credential Bar.**
  - *JOB REQUIRED-Supplemental Employment:* Use this to help track customers who have supplemental employment that will not be captured through wage data (e.g. employed out-of-state, contract employment, or other employment that does not pay into the Illinois unemployment compensation system). **You must also set employment to "yes" for the quarter and add the job.**
  - *JOB REQUIRED-Registered Apprenticeship:* Use this to help track customers that are employed through a registered apprenticeship. **You must also set employment to "yes" for the quarter and add the job.**

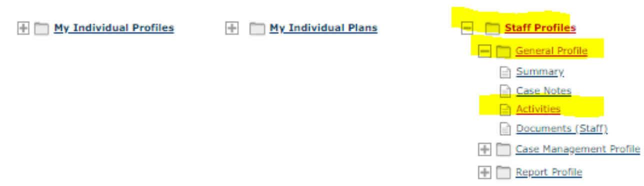

This Is the TRAINING site. DO NOT enter real client data.
Home
My Dashboard
Sign Out
Services for Individuals
Quick Search
Current Status at Follow-up
Follow-up Information:
* Actual Date of Follow-Up:
11/07/2019
Today
* Contact Type:
Telephone - Individual
Other (specify):
This section is required only when no employment, no youth placement and no youth diploma/credential is recorded on the follow-up screen.
Follow-up Status
Status at Follow-Up:
None Selected
None Selected
CREDENTIAL REQUIRED-Attained Credential/Diploma/Certificate
JOB REQUIRED-Supplemental Employment
Reserve Forces called to Active Duty
Military Service / Employment
JOB REQUIRED-Registered Apprenticeship
Health/Medical (other)
Deceased (other)
Institutionalized/Incarcerated
Foster Care
Other (specify):
Comments:
Staff Information

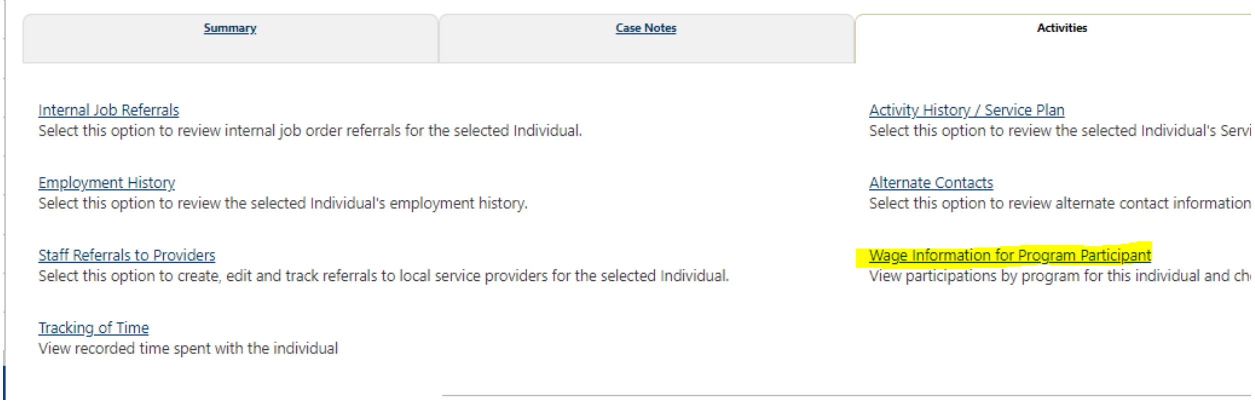
6) **Staff Information Section:**

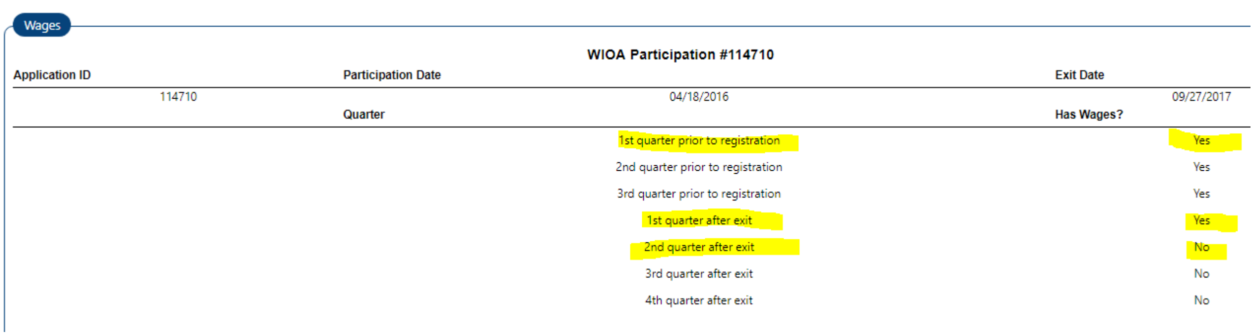
- Select your Office.
- Add and save a Case Note detailing the follow-up information.
- Click “Save” on the bottom of the Follow-up screen.



7) **Wage Data:** In Career Connect, wage data is stored separately from the quarterly follow-up record. To see if a customer has wages posted for a given quarter, go to Staff Profile > General Profile > Activities and click on “Wage Information for Program Participant”.







NOTE: ***This screen does not show actual wages, only a Yes/No to indicate if the customer had wages in the quarter. See the “Reports” section below for running reports with wage data.***

Reports

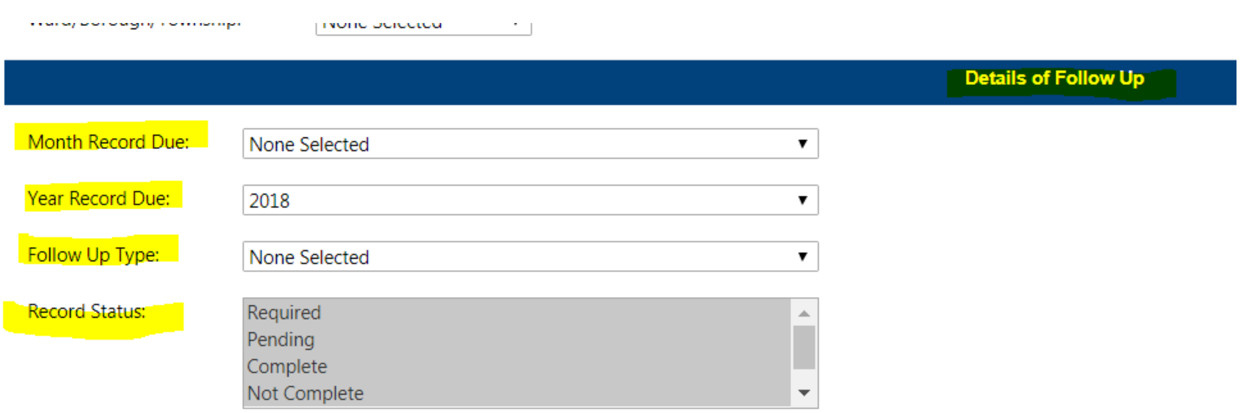
There are several Career Connect reports that can help you track follow-up, including:

- Quarterly Follow-up Status
- Wage Change for Program Exiters
- Median Earnings Indicators

Quarterly Follow-up Status Report

The Quarterly Follow-up Status report is great for seeing which customers have completed follow-ups and which are missing. It also includes the “Other Follow-up Status” (e.g. incarcerated, supplemental employment, etc.). It can be filtered to include customer contact information.

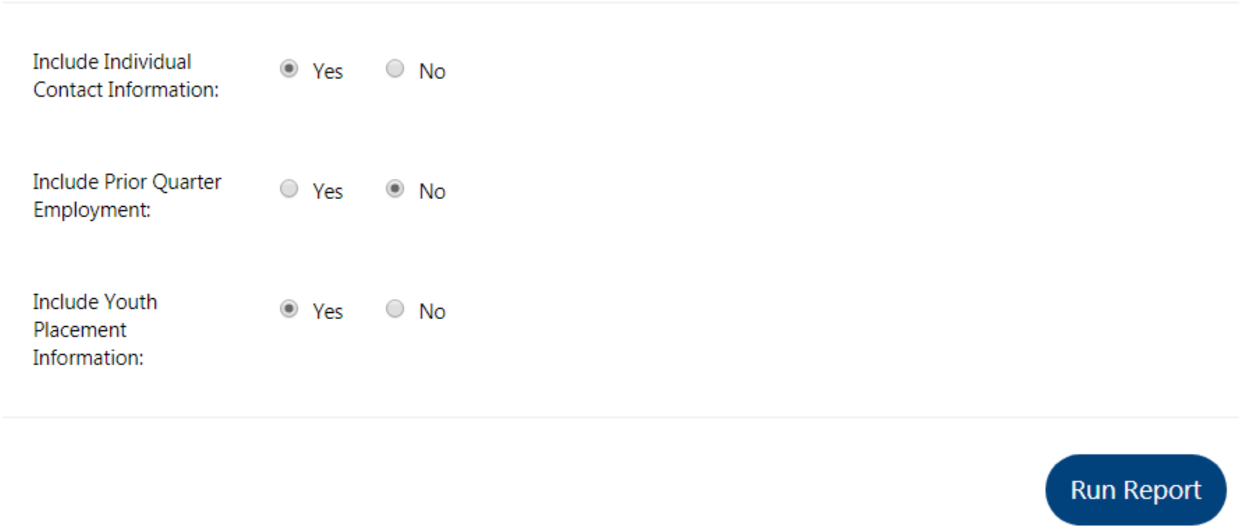
1) Go to Detailed Reports > Case Load > Quarterly Follow-up Status
2) Select the following filters:
   - Program: Title I – Workforce Development (WIOA)
   - Customer Group: as desired
   - Office Location: if you work with multiple offices
   - Details of Follow-up Section:
     - Month Record Due: filters for follow-ups due in a particular month. Leave as “None Selected” to get all months
     - Year Record Due: filters for follow-ups due in a specified calendar year. Select the year you want.
     - Follow-up Type: filters for follow-ups due in a specified quarter of the “Year Record Due”. Leave as “None Selected” to get all quarters in the year.
     - Record Status: filters to only include follow-up records with a particular status (e.g. completed, required, incomplete, not required, etc.) The default includes all status types. Use the “ctrl” key to select multiple status types.



   - There are 3 additional filters at the bottom of the screen that you can use to add data to your report. All 3 default to “No”.
     - Include Individual Contact Information: selecting “Yes” will include customer’s email address and primary and alternate phone numbers.

- Include Prior Quarter Employment: selecting “Yes” will include any employment the customer had in the prior quarter.
- Include Youth Placement Information: selecting “Yes” will include any information entered in the “Post-Exit Placement Information” section of the follow-up screen, even if the customer is Adult/DW.

3) Run the report.



Wage Change Report

This report currently shows supplemental and wage data for the first quarter after exit. The Partnership has requested that this report be updated to include data for all four quarters after exit.

1) Go to Detailed Reports > Predictive Reports > Wage Change for Program Exiters
2) Select the following filters:
   - Title I – Workforce Development (WIOA)
   - Customer Group: select as desired
   - Office Location: select if you work with multiple offices
   - Filter by Date:
     - Select “Exit Date” to get the data for all exiters within a date range
     - Select “Qtr 1 Follow Up Required By Date” to get data for all customers who have a required Q1 follow-up within the date range
   - Date Range: select as desired
3) Run the report.

Median Earnings Indicators

This report uses both supplemental and wage data to help you determine if you are meeting your earnings performance measures.

1) Go to Detailed Reports > Predictive > Median Earnings Indicators
2) Select the following filters:
    - In the "Report Format" section check the boxes to add the desired columns to your report
    - Program: Title I – Workforce Development (WIOA)
    - Customer Group: select as desired
    - Office Location: select if you work across multiple offices
    - Date Range Type: Use "Manual" to select a custom date range
    - Date Range: select your desired date range
3) Run report.