

# **Individual Employment Plan / Individual Service Strategy Webinar Q&A**

## **Wednesday, July 22, 2020**

### **1. What is the difference between comments and case notes?**

The comments are the justification for the objective. They should clearly describe the "why" for the objective. Each service requires a case note and needs to connect back to the IEP/ISS objective. The Case Note must include details regarding the client's progression in the open service. Please refer to the OAS and IEP/ISS Procedures for instructions on how to write Case Notes.

### **2. The basic skills, barriers, and supportive services worksheets seems repetitive. The same information is already entered during the Career Connect registration process or answered on the OAS or explained in the IEP's objective justification. Is this duplication necessary?**

They are not repetitive nor duplicative. The OAS is where you collect and compile objective assessment data specific to a participant. The worksheet is where you deliberately identify potential barriers to employment by answering questions using data collected in OAS.

### **3. Question about barriers as they relate to the IEP. I believe that it was stated, for example, that if a participant is homeless, this barrier needs to be addressed in the IEP. Where would this fit in if the only goals are related to Employment and Education?**

Employment and Education is the ultimate goal. However, if the client has any barriers that hinders them from accomplishing the goals, that barrier should be identified in the objectives.

### **4. Do WIOA funds assist with providing housing for those experiencing homelessness?**

If a participant is homeless, the Career Coach must work with the participant to stabilize the participant's housing situation. This should be an objective in the IEP. The Career Coach must work with the client to identify community resources before utilizing WIOA funds. Please contact your Regional Manager for allowable supportive services expenses.

### **5. Often, the customer wants to go into a field such as Healthcare and will take any job that will get their foot in the door. Do we need to identify a specific occupation?**

The Career Coach should work with a participant to identify a career path. Then the career coach should work with the participant to create an individualized plan to achieve their employment goals.

**6. I do case notes when opening the ISS service, should that not suffice for the Objective Justification?**

A justification should be entered for each objective and the Career Coach should also enter a case note for each service provided. Please refer to the IEP/ISS Procedure for additional instructions.

**7. If a participant opts out of obtaining bridge supports, can a case note be sufficient stating that participant declined bridge supports to increase scores from assessments? Does it have to be added on this form, OAS and the IEP - seems very repetitious.**

If a participant has low basic skills scores but refuses or declines to take steps to improve those scores, you must record those facts in the case notes. If failing to improve the basic skills scores means that the participant will not be able to pursue a specific career goal because an improved basic skills score is required, then the participant must select a different employment goal.

**8. Is the Review Date the due date for updating the client's progress/status?**

Yes, the Review Dates are essentially due dates for the objective. They can be updated and modified to show the status or progress of each objective.

**9. Would it not be appropriate for the OAS requirements be covered during the Initial Assessment? Saves Time for all involved.**

Eligibility for the WIOA program should be conducted first. The objective assessment should be completed next. Followed by identification of a career path and completion of the Skills Inventory Worksheet. The OAS and the Skills Inventory Worksheet should be completed prior to developing the IEP/ISS.

**10. How do you enter Objective Justifications?**

The IEP/ISS Procedure provides step by step instructions on entering the Objective Justification.

**11. Can the Career Connect system be changed to no longer default review end dates. That way the coach can enter more realistic end dates.**

Unfortunately, we are unable to change this. However, you can change the dates manually at any time. The alerts can be set as a reminder to change dates.

**12. Is there a way to add, upload, or download the information that's captured in the OAS to the worksheet or vice versa.**

Currently, the Skill Inventory Worksheet (SIW) is a stand-alone document and cannot be transposed into the OAS.

**13. Should an objective have a case note entered if it needs to be revised?**

Yes, a case note is required for any revisions or updates.

**14. Does every objective needs a justification.**

Objectives should be created to address issues which would hinder a participant from Accomplishing their employment goal(s).

**15. Where do we find information to complete the Skills Inventory Employment Goals sections?**

There are numerous resources available. For example, you may look for job descriptions, training requirements, information on specific jobs provided by industry experts, DOL occupational guides on the internet. You can also review the TOPS on the Partnership's website.

**16. If the point of making notes on the IEP is to justify needs for services, why do we also need the IEP Employment Goal Skills Inventory to justify them as well?**

The IEP Employment Goal Skills Inventory is a worksheet to help you come to the conclusions as to what services and objectives are necessary.

**17. When an OAS is created, the program name shows as Title III - Wagner-Peyser (WP). Is there a way to convert that to WIOA after registration?**

We are aware it will default to WP. It will convert to WIOA once the career coach opens the first WIOA service.

**18. Do we need to go back to all of our registrations and do the OAS?**

The OAS must be completed for all WIOA clients who were made eligible on or after July 1, 2020.

**19. Do we need to add objective justification if IEP was developed earlier this month.**

The objective justification must be entered for anyone that registered as of July 1, 2020. While you may not be required to complete the OAS for participants who were registered prior to July 1, 2020, you still must be able to justify the delivery of each service or potentially face disallowed cost.

**20. We were told to complete the OAS first before during the IEP. Is that still correct?**

The process is 1) OAS, 2) Identify a specific employment goal, 3) Skills Inventory Worksheet, and 4) IEP/ISS

**21. Can we pay for all things on this Skills Inventory list: ie Physical? Driving Record, Drug Test?**

Support Services will cover many items such as a physical, work clothes, drug test and driving records. It is important that you prove the need to justify the cost. Please discuss any expenses that are higher in costs or may sound questionable with your Regional Manager.

**22. The TABE test scores have been more deficient in level 11/12 than they ever were in 9/10. Can you please provide an example of what we would say in column 4 if we still decide to place someone in occupational training despite their TABE levels? It is hard to determine suitability until after the assessment.**

You will need to demonstrate that despite the test scores the participant will still be able to succeed. or conduct an interview that will provide examples of the participant's preparedness for the training.

Yes, a training justification case note is still required. Please refer to the Basic Skills Deficiency Assessment Temporary Procedure. It should now be called the "Comprehensive Assessment for Training Suitability" case note rather than the Training Justification case note. The OAS is just participant data. In and of itself the OAS justifies nothing until compared to the employment goal skill requirements identified in the worksheet. Certificates earned during the course of the WIOA program are not recorded in the OAS. These credentials are entered on the Programs Tab under Credentials.

**23. If a 1N Opioid customer is seeking employment only, where would we put the OAS and this worksheet in IWDS?**

There is a separate training for the Opioid Grant. Please contact the Partnership staff overseeing this grant.

**24. Do we need to get the Objective Summary re-signed anytime we make changes?**

No, signatures are not required for objective updates. Signatures are required if the clients Goal(s) change.

**25. Is the Skills Inventory Worksheet something that will be in Career Connect or is it a stand-alone document?**

The Skills Inventory Worksheet (SIW) is a stand-alone document and not currently in Career Connect.

**26. Will the Skills Inventory Worksheet be incorporated into Career Connect at some point?**

Yes, the Skills Inventory Worksheet will be incorporated into Career Connect at some point.

**27. We were advised to insert data from the IEP's In-School Youth with disabilities into the ISS - do we continue to do so?**

Yes, you can record the IEP Youth with Disabilities data into the ISS.

**28. At the last audit, we were dinged for having an industry in Description of Goal & not a specific occupation.**

An industry is a very large target. You need to narrow your focus.