



Closure/Exit Procedure

Overview

For each participant, the WIOA application must be Closed once the participant is no longer in need of services. All customers in WIOA for 90 days without an active service **MUST** be exited from WIOA back to the end date of the last active service. Agencies must monitor their case load and run the Days Since Last Active Service Report on a monthly basis. These are the steps that must be followed in order to Close the participant's application and Exit the participant from WIOA.

Navigation

Create a Closure for every customer when it has been determined the participant is no longer in need of services and the application needs to be Closed and Exited. The "Closure" bar can be found under "staff profiles > case management > programs > click on the (+) WIOA Application > Closure".

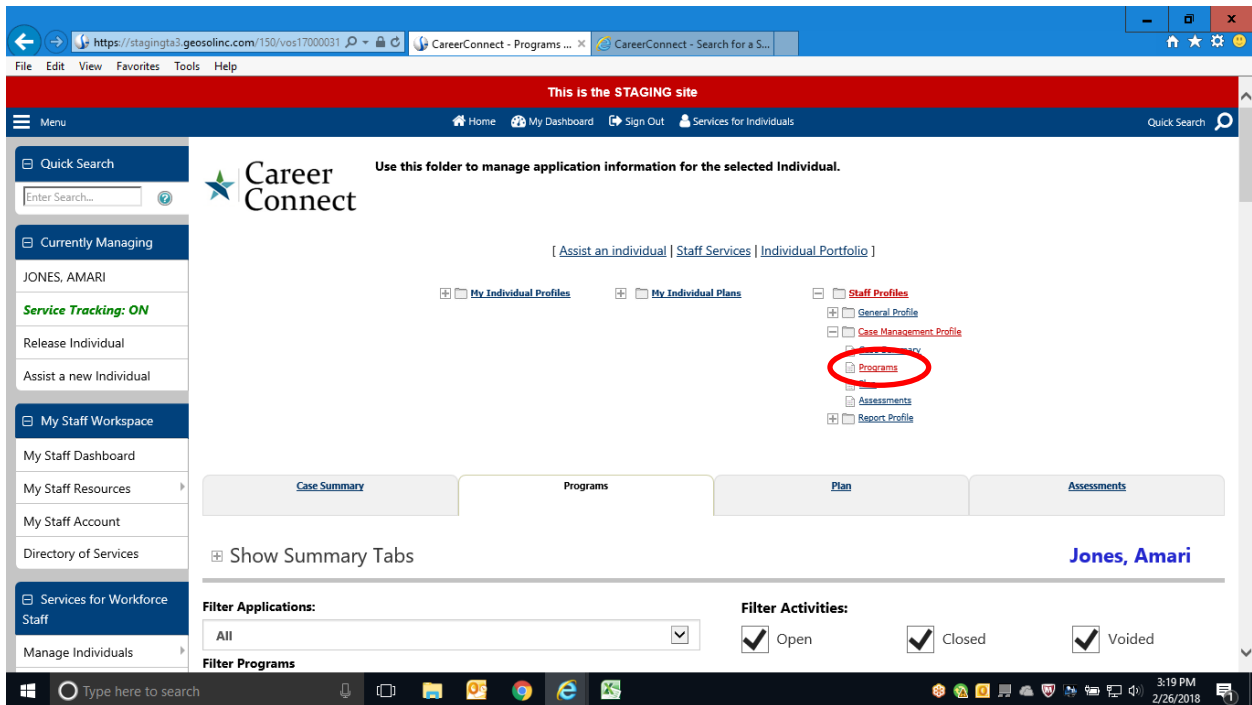
Procedures

Please make sure the following, if applicable, have been completed **BEFORE** Creating a Closure in Career Connect:

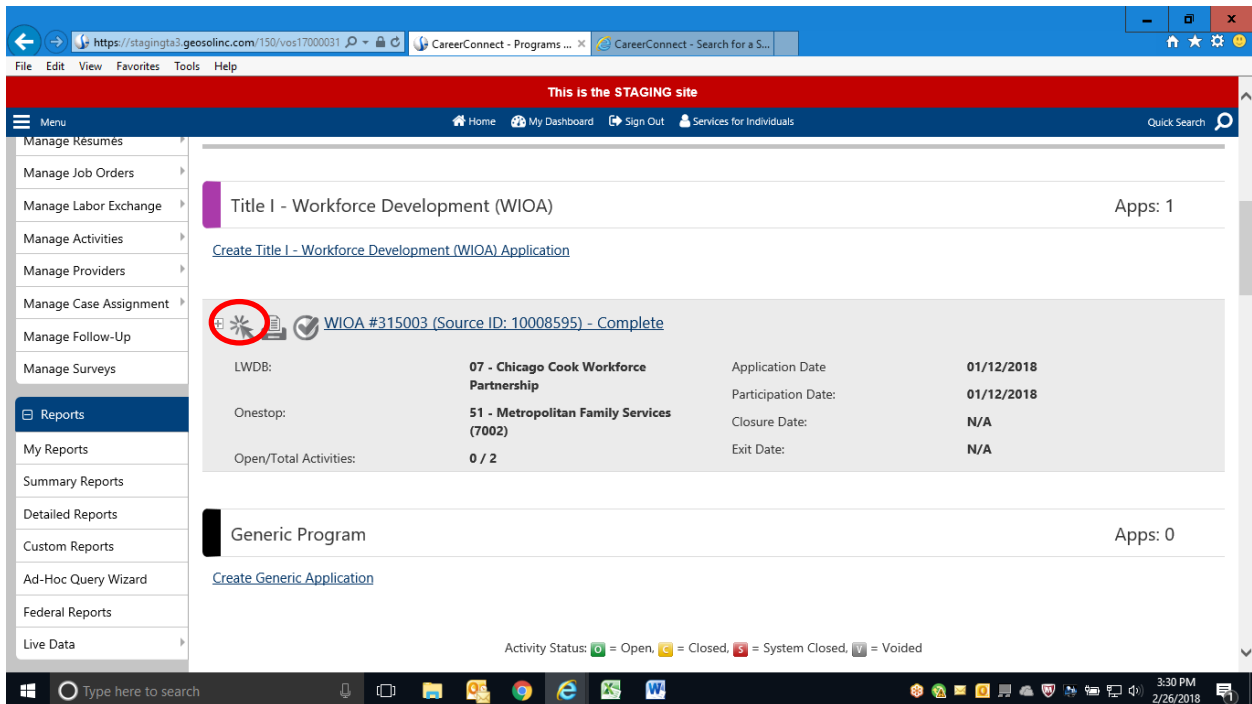
1. Make sure the IEP/ISS Plan has been closed (see IEP/ISS procedures for further guidance).
2. Make sure all services:
 - Are recorded
 - Have an actual begin date **and** an actual end date
 - Have a provider
3. Add any credentials earned during the program to the WIOA Credential bar (see Credential Procedure for further guidance).
4. Make sure any Measurable Skills Gains attained during the program have been added 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)

Once items above have been completed then you can create the Closure for the participant.

Step 1: Once you are "Assisting" the customer, click on the Programs Link.



Step 2: Then click on the (+) next to the WIOA Application to expand the section.

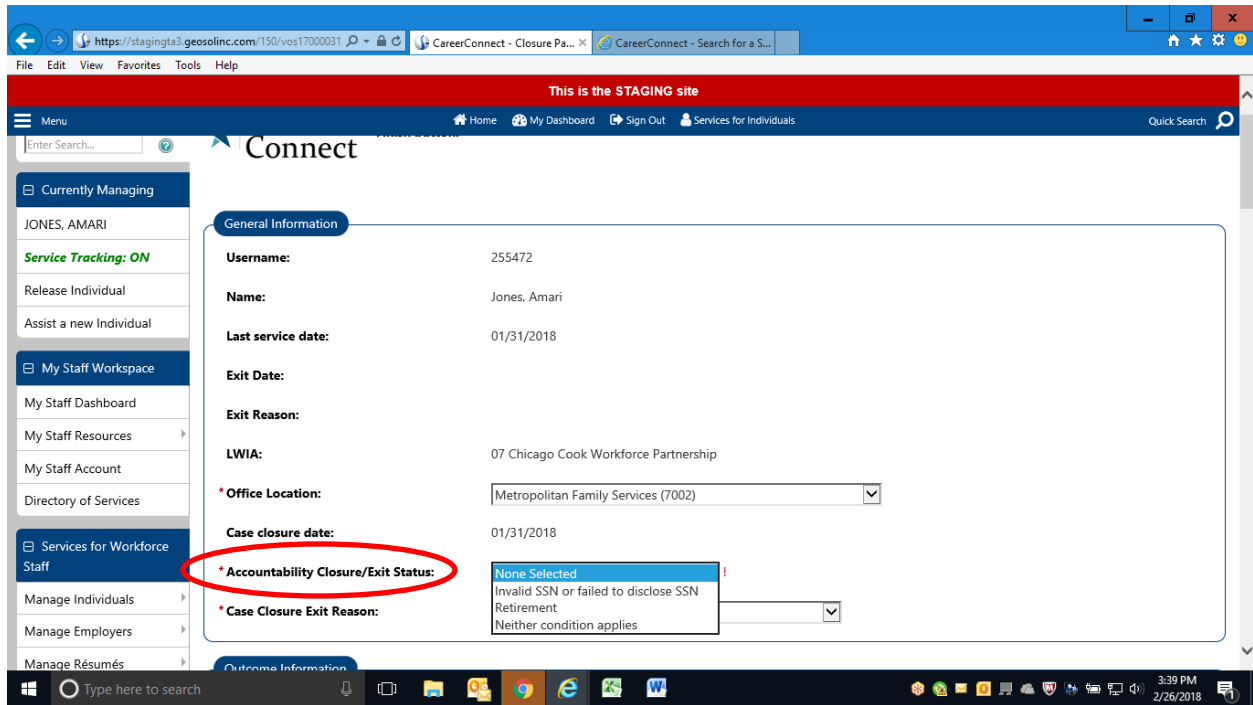


Step 3: Click on the Closure (+) to expand the section and click on “Create Closure”.

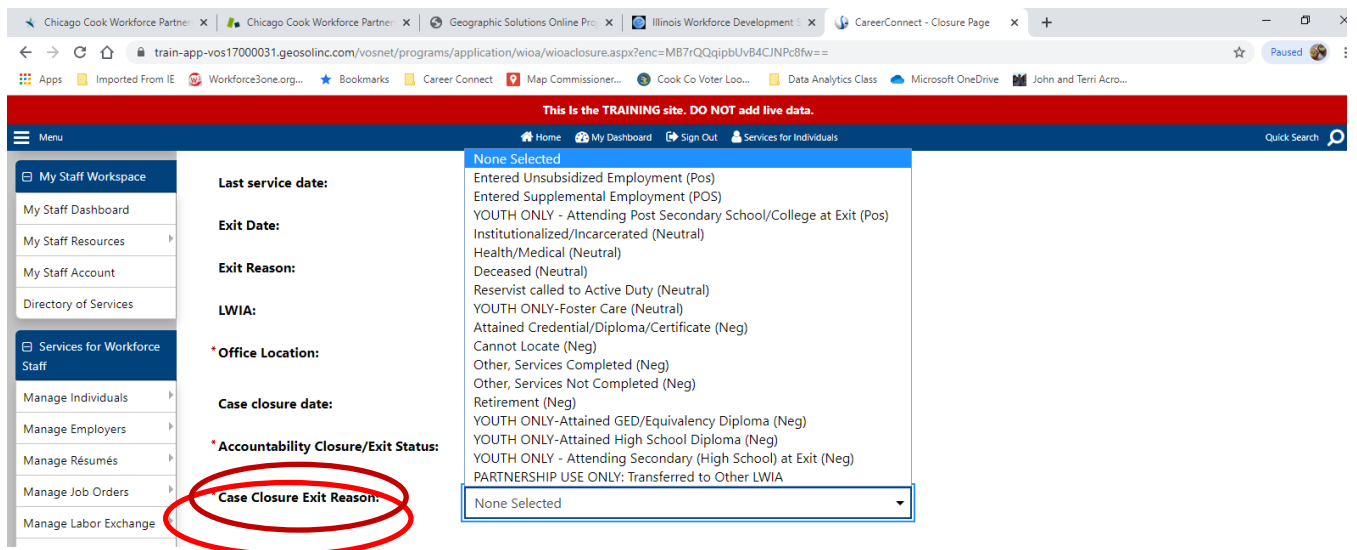
Eligibility Summary	
Participation	09/12/2019
Activities / Enrollments / Services	1
Measurable Skills Gain	0
Educational Functioning Level for Measurable Skills Gain	0
Credentials	0
Partner Programs	0
Add Employment	0
Closure	N/A
Create Closure	
Exit / Outcome	N/A
Follow-ups	0

Step 4: In the General Information section:

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

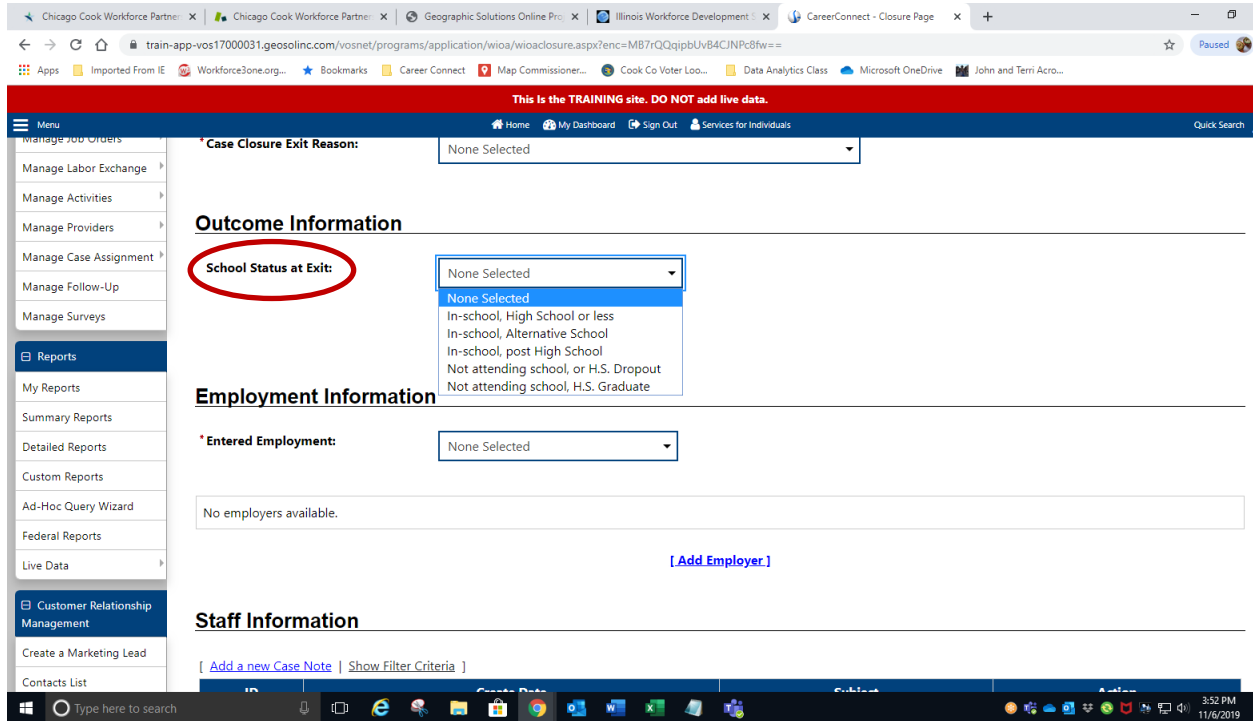


Step 5: Choose the appropriate Case Closure Exit reason. A list is available in Appendix A below. Note that some reasons may only be used for Youth participants and are labeled as “YOUTH ONLY”.



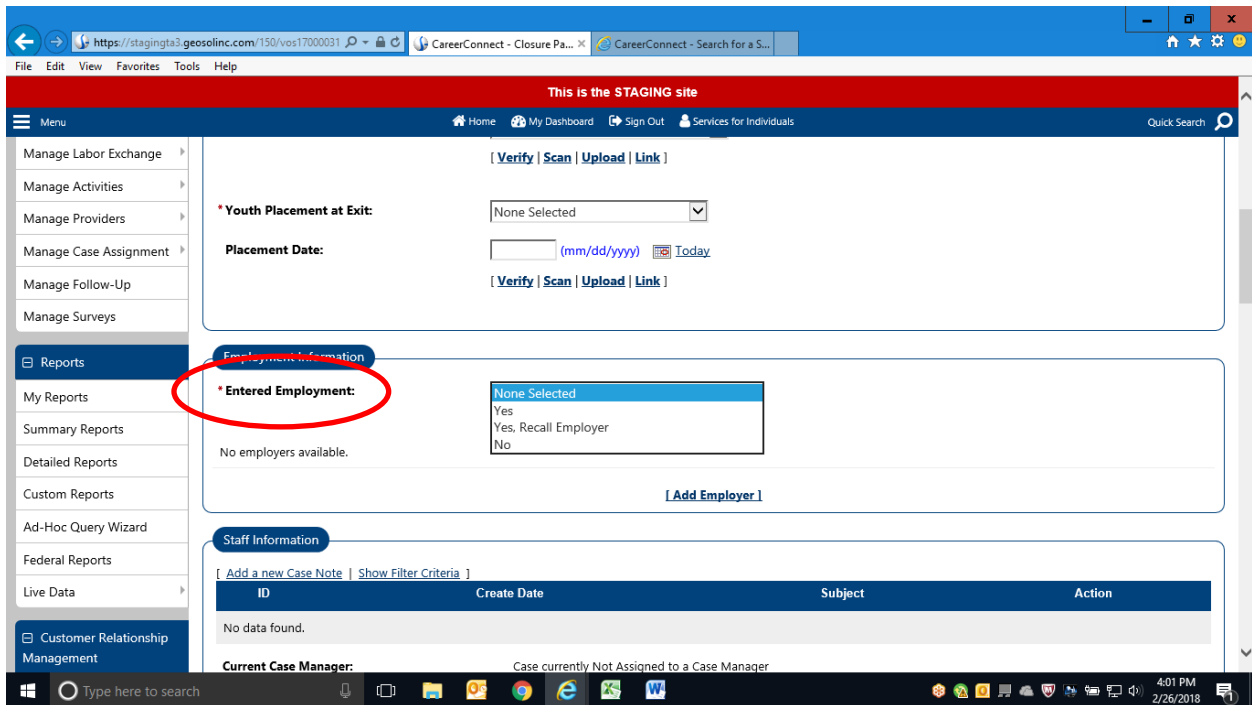
Note: If your customer has gone over 120 days with out a service you will not be able to select a Case Closure Exit reason. Please contact your Regional Manager for further guidance on how to Close/Exit any customers in this situation.

Step 6: 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.

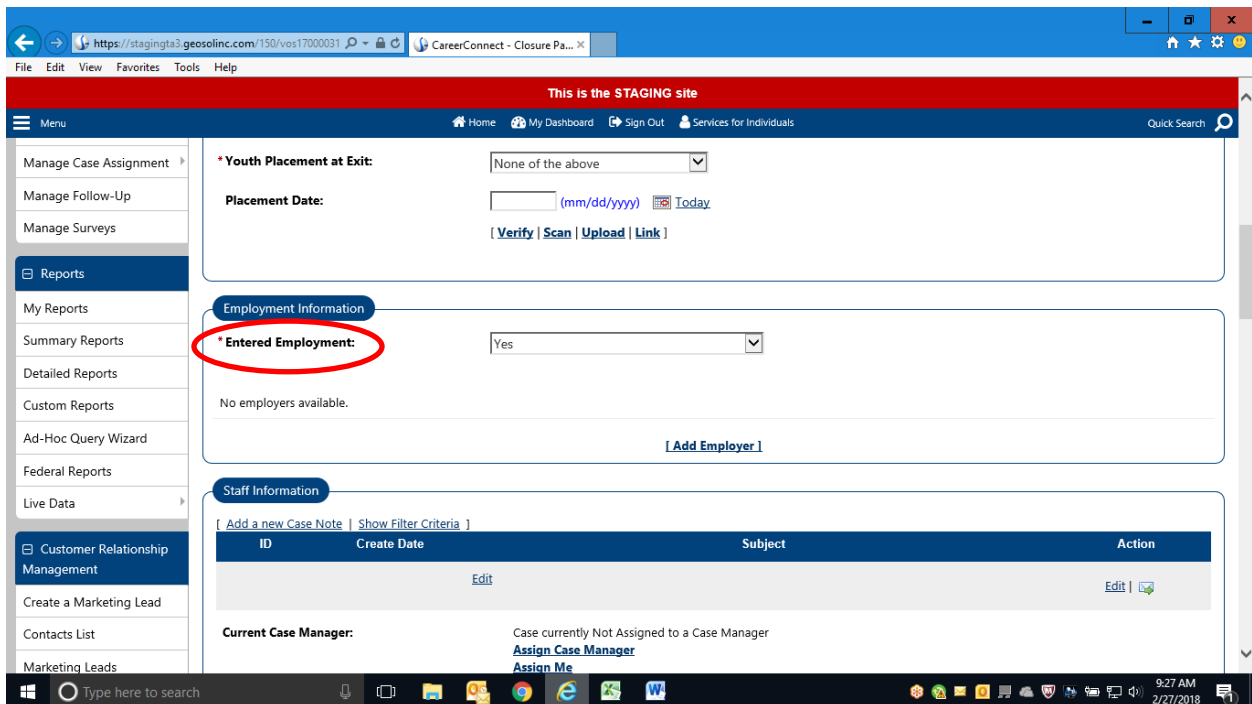


If a Youth is both employed and enrolled in post-secondary education at Closure, select “Youth Only-Attending Post Secondary School / College at Exit (Pos)” as the Closure Reason. The employment will be counted by entering the job as explained below.

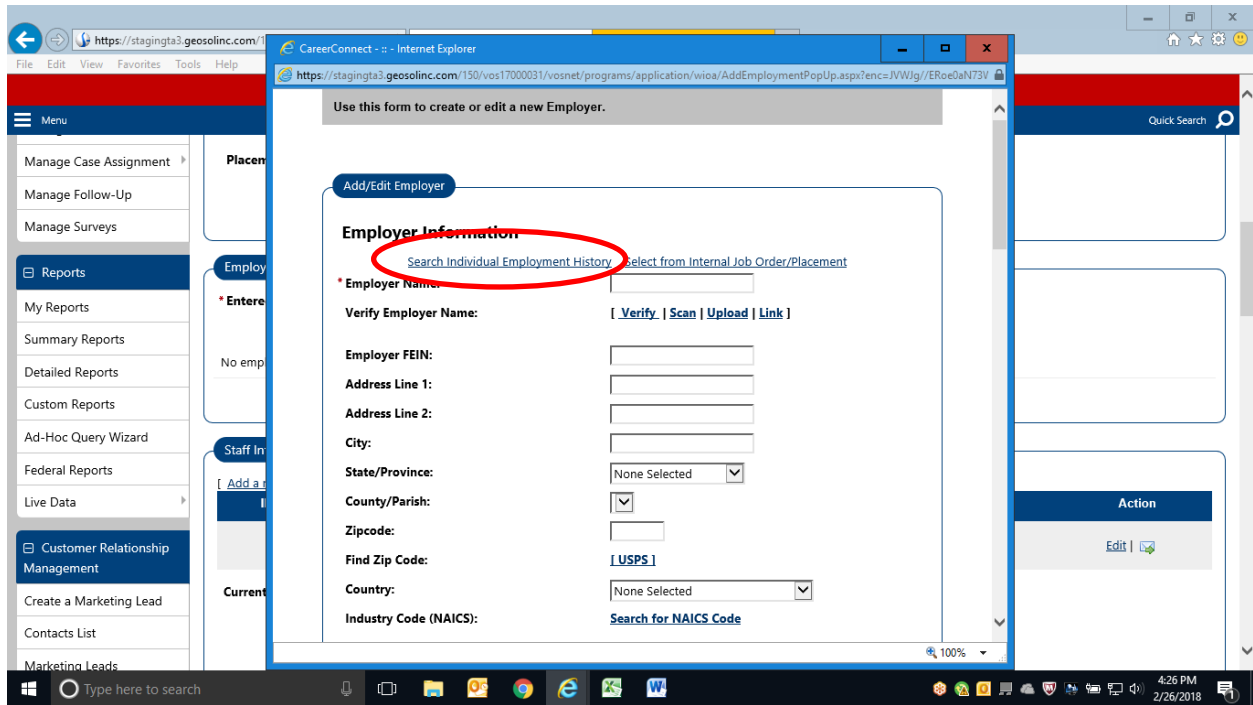
Step 7: The question “Entered Employment” must be answered regardless of the exit reason for the participant.



If the participant is exiting with employment, the job at Closure must be completed and verified in the Employment Information section.



To select a job that has already been added to the Add 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 as well. This screen works just like any other screen that allows you to add employment. This information must also be Verified.



Step 8: 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 exit.

[\[Add Employer \]](#)

Staff Information

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

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

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Step 9: Once the job has been entered, click on “SAVE” and the participant has been Closed. Creating the Closure automatically Exits the customer from WIOA. 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.

The screenshot shows a web application interface with a sidebar menu on the left. The main content area is divided into several sections:

- Entered Employment:** A dropdown menu is set to "Yes". Below it is a table with columns: Employer Name, Job Title, Start Date, End Date, Non-Traditional, Training Related, and Action. One row is visible with "Target" as the Employer Name, "Stock Clerk" as the Job Title, and "02/06/2018" as the Start Date. The "Save" button is circled in red.
- Staff Information:** A section with a table containing columns: ID, Create Date, Subject, and Action. There is an "Edit" button below the table.
- Current Case Manager:** A section with the text "Case currently Not Assigned to a Case Manager" and three links: "Assign Case Manager", "Assign Me", and "Remove Case Manager Assignment".
- Bottom Buttons:** A row of buttons: "Save" (circled in red), "Cancel", "Delete", and "Print Preview".

Now the participant has been Closed/Exited and a Closure and Exit/Outcome date will appear.

The screenshot shows a web application interface for a staging site. The browser address bar displays the URL: <https://stagingta3.geosolinc.com/150/vos17000031>. The page title is "This is the STAGING site". The navigation bar includes "Home", "My Dashboard", "Sign Out", and "Services for Individuals". A search bar is located on the right. The main content area displays a summary table with the following data:

Category	Value
Eligibility Summary	
Participation	01/12/2018
Activities / Enrollments / Services	2
Measurable Skills Gain	0
Partner Programs	0
Literacy & Numeracy	0
Credentials	0
Add Employment	1
Closure	01/31/2018
Exit / Outcome	01/31/2018
Follow-ups	0

The "Closure" and "Exit / Outcome" rows are circled in red in the original image. The Windows taskbar at the bottom shows the time as 4:35 PM on 2/26/2018.

Note: If you complete the Closure, and the Exit/Outcome date does not display, contact your Program Coordinator or Regional Manager immediately, as the customer is not fully exited.

Step 10: 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:

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

*** Service Activity Level:**

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

Projected Begin Date:

Actual Begin Date:

*** Projected End Date:**

Any classes attended through Distance Learning: Yes No

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

Exit Reports

The “Exited Cases” report returns a list of exiters including Exit Date and Exit Reason. To run this report, go to Detailed Reports > Case Load > Exited Cases and select the following filters:

- Program: Title I – Workforce Development
- Customer Group: Select desired customer group; leave as “none selected” to return all customer groups
- Office Location: Select if you work across multiple offices
- Exit Reason: Leave as “none selected” to return all exited clients
- Filter by Date: Exit Date (to return all exits that occurred within the selected date range)
- Date Range: Select your desired date range

Click “Run Report”.

If you want to count your positive exits, To get Positive Exits from the report results, either sort by the “Exit Reason” column and manually count, or export into Excel or CSV and use the following formula:

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=COUNTIF(RANGE, “*(POS)*”)
```

where *RANGE* = the range of cells containing the Exit Reason (e.g. M2:M32).

In order to see customer who have not had a service in over 90-days (and thus need to be exited), run the “Days Since Last Active Service” report by going to Detailed Reports > Case Management Reports > Case Load > Days Since Last Active Service and select the following filters:

- Program: Title I – Workforce Development (WIOA)
- Customer Group (as necessary)
- Office Location: select your Office (press Ctrl to select multiple offices)
- Days Since Last Active Activity – Leave as “None Selected”
- **IMPORTANT:** Exclude Activities Excluded from Soft Exit – Set to “YES” so that the report is based on **ACTIVE** services only.

The report will show the number of days since the last active service. Note that customers with any open active services (including open same-day services) will not appear on the list.

If any customers have gone 120 days or more without an active service, please contact your Regional Manager or Program Coordinator immediately for instructions on how to exit these customers.

APPENDIX A
WIOA Title I Exit Reasons as of 11/1/2019

Positive Exit Reasons

Entered Unsubsidized Employment (Pos)
Entered Supplemental Employment (Pos)
YOUTH ONLY – Attending Post Secondary School/College at Exit (Pos)

Neutral Exit Reasons

Deceased (Neutral)
Health/Medical (Neutral)
Institutionalized / Incarcerated (Neutral)
Reservist called to Active Duty (Neutral)
YOUTH ONLY – Foster Care (Neutral)

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)