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4/21/2025

Office Hours Service Matrix Changes

General Rules for Service Entry



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- Document every service provided within 10 days of it being given.
- Ensure the services are outlined in the Individual Employment Plan (IEP) or Individual Service Strategy (ISS).
- Case Notes are used to describe and document the service provided.
- Do not use Career Planning service to capture another service listed in the Matrix. Use the Service Matrix to determine what to select before entering in Career Connect.
- There is no required sequence or order of services for the **Adult/Dislocated Worker** programs. However, we have a suggested order of services.
- **Youth** programs do have a required order of services

What is the Service Matrix?



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- A document that houses all services and definitions available for use under WIOA guidance.
- A reference tool for clear, concise up to date service information
- Separated by different categories of services:
 - Adult & Dislocated Worker Career
 - Adult & Dislocated Worker Training
 - Youth Program Elements
 - Supportive Services
 - Follow Up



Service Matrix



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- The Service Matrix can be found on the Help Desk:

<https://workforceboard.zendesk.com/hc/en-us/articles/35768829869581->

- Each tab is color coded by Category of service
 - ✓ Column indicating if the service Extends 90-day Exit Window
 - ✓ Pre-Requisite column indicates what rules apply to each service
 - ✓ Performance Measure column has been updated to include all applicable measures

Adult & Dislocated Worker Career Services - 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requisite	WIOA Performance Measure(s) ³
205	Development of an IEP (Same Day Service)	Yes	Yes	The Individual Employment Plan (IEP) is jointly developed by the participant and career planner. The plan is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve the employment and career goals, including providing information on eligible providers of training services and career pathways to attain career objectives. The IEP is the basic instrument for the LWIAs to document the appropriateness of the decisions made about the combination of services for the participant, including referrals to other programs for specified activities.	Completed Assessment	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)

Adult & DW Career Services

Adult & DW Training Services

Youth Services

Supportive Services (SS)

Follow-Up Services

Customer Flow (1A & 1D only)



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Customer Flow Recommendation

First Service:

1. *Initial Assessment of Skill Levels & Other Needs (228)*



Next choices:

2. *Comprehensive & Specialized Assessment (207). **Still ties to the Objective Assessment Summary (OAS)***
3. *Career Information Service (208)*

4. *Development of an IEP (205)*

- In order to create a good plan, you must “get to know” your customer through both Assessments and you must know what career the participant is interested in.

NOTE: All three services (228, 207 & 208) MUST be provided before Developing the IEP (205)

Customer Flow



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Customer Flow Youth Requirements

First 3 Non-Enrolling Activities for youth are REQUIRED:

468 – New! Youth Eligibility Determination/Intake (replacing Career Planning)

469 – Youth Objective Assessment

470 – Develop Individual Service Strategy (ISS) Same Day Service

NEXT

Any Enrolling Youth Program Element Service



**Please Note: Service code changes
for a more logical sequence**

Update! Youth Program Element 13 (Youth only)



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Service 404: Youth Career Planning

- This will now be considered an Active/Enrolling service
- What does this mean?
 - ✓ This service will count when considering the 90-day service requirement
 - ✓ This service will now re-set the clock and will extend exit.



Reminders: Service vs. Case Note



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➤ Service

- Is provided when staff uses information to determine a course of action or next steps for a participant.
- Something “actionable” must take place between the participant and the Career Coach.
- When an action is taking place with participant, refer to the Service Matrix to ensure the correct service is recorded.

➤ Case Note

- For example, you held a brief conversation to verify employment or ensure everything is going well with the participant, and no requests are made of you for more services.
- You are NOT providing a service.
- General Case Note is the method of documentation.
- Individual cases should be reviewed for exit when no service is provided.

Q & A



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Please type your questions in the chat or you can raise your hand to speak.



Upcoming Webinars



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The Partnership will be hosting the following webinars. Please join us for:

- **Career Coaching 101**
April 23, 2025
10am – 12pm
- **WIOA Supervisors Training**
April 30, 2025
10am – 12pm



Register Here:

<https://workforceboard.zendesk.com/hc/en-us/sections/3600000173031->



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Thank You!!!



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