Please click on one of the links below to be immediately connected to your topic of interest.

I.   General Co-Enrollment Pilot Process
II.  Customer Interaction & Information Gathering
III. Co-Enrollment Referral Report
IV.  TAA and WIOA Coordination
V.   OWCMS Information
VI.  Staff Training Requests
I. GENERAL CO-ENROLLMENT PILOT PROCESS

1. Question: How will changes to the pilot process be communicated? 12.2.21
   Answer: Updates and changes will be communicated through the Q&A Summary document issued after each Q&A session.

2. Question: Are customers to be co-enrolled for petitions prior to the 98,000 and above? And, if so, do the Trade Delivery Representatives CSRs have to go back and update to let the customers know they will be contacted by a partner staff under WIOA for additional services? 12.2.21
   Answer: Yes - all customers that are certified and, on our reports, as of Oct. 1st and forward will be part of the co-enrollment process regardless of law. As a result, TDPs will not be going past Oct. 1st and updating customers.

3. Question: Can the Co-Services Possibilities List be adjusted so the comments do not go to the top and move everything down? 12.2.21
   Answer: Yes - OWD will adjust the formatting and issue a revised version of the document.

4. Question: Will the contact list be re-distributed when changes are made to personnel, such as moving under a new supervisor? 12.16.21
   Answer: Yes – OWD will send out new lists as needed.

5. Question: How will the Q&As be accessed for future reference? Will they be stored like the RESEA files in TEAMS? 12.16.21
   Answer: OWD will upload all TAA-WIOA Co-Enrollment technical assistance materials to the Training for Workforce Development Professionals website located at https://jfs.ohio.gov/owd/WorkforceProf/WFDtraining.stm. TEAMS will not be utilized for this purpose.

6. Question: Once a customer has completed training, can we have a Monitor review the case and offer feedback? 12.16.21
   Answer: Generally, the Monitors will review TAA-WIOA co-enrolled customer cases in a manner that is similar to reviewing traditional WIOA-DLW files, including checking for source materials to document eligibility as well as supplemental information, such as signatures on required documents, provision of assessments, development of Individual Opportunity Plans, and justification for training and/or supportive services, as applicable. The Monitors will also review information to determine if co-enrollment into WIOA occurred within the same quarter as the first TAA participating service as required by USDOL. OWD is currently working with the Monitoring Department to develop the specific monitoring guidelines that will be used for co-enrollment. This information will be provided to the pilot Counties as soon as it is available.
7. **Question: What makes an entity a WIET training provider? 01.7.2022**

**Answer:** To be an approved provider on the WIET list, the entity must have both an approved provider registration and at least one approved program. The provider registration requires the training provider to supply the following information

- **Have remained in business for at least two years at the time of registration,**
- **Have a valid FEIN and be in good standing,**
- **Be registered with Ohio’s Secretary of State (or state in which they are operating) unless exempt (such as Title IV schools, Ohio Technical Centers, etc.), and**
- **Not have an active exclusion on the System for Award Management, or be placed on the US Department of Education’s Debarment List.**

Once a provider registration has been approved, the training provider may log in and submit their program (or programs). Each program is reviewed to ensure that it will result in a Recognized Postsecondary Credential (RPC). If this is the case, the program will be approved. Once a provider has at least one approved program, it will be visible in public WIET site search and considered an Eligible Training Provider.

8. **Question: Is there a way for a WIOA case manager to see the vendor of the state TAA list? 01.07.22**

**Answer:** We need additional information to understand where in the process this information is needed.

**II. CUSTOMER INTERACTION & INFORMATION GATHERING**

1. **Question: Does WIOA need to collect all Dislocated Worker eligibility documentation from the TAA-referred customer? 12.16.21**

**Answer:** No – Because the referred customer has already been determined TAA-eligible, he or she is automatically considered eligible for WIOA-Dislocated Worker services, so long as Selective Service requirements have been met. It is important to note that WIOA may need to collect other supplementation information, including barriers to employment and/or signatures on required forms, such as the complaint rights form. Please refer to WIOAPL 15-07.2, Attachment A for more information.

2. **Question: Do additional source documents need to be collected by WIOA to determine if the customer may also be eligible for WIOA-Adult services? 12.16.21**

**Answer:** The same allowable source documents that were used to determine TAA eligibility can be used to determine a customer’s eligibility for additional WIOA programs, including, but not limited to Adult, COVID-19 DLW, and Opioid DLW. However, the customer must first receive a WIOA-DLW participating service before he or she is enrolled into additional programs.
3. Question: What do we do if a customer chooses not to be co-enrolled? 12.16.21
Answer: If a customer indicates that he or she does not choose to be co-enrolled, then the TAA or WIOA representative should clearly state this decision in the customer’s case notes. After doing so, the TAA or WIOA representative should provide the customer’s name and seeker id to Derek Ault at Derek.Ault@jfs.ohio.gov and Debbie Marchek at Debbie.Marchek@jfs.ohio.gov to have the customer removed from future Co-Enrollment Referral Reports.

4. Question: What happens if the potential WIOA participant doesn’t want to co-enroll in the same quarter as the first TAA participating service? 01.07.22
Answer: The WIOA staff member should clearly indicate in case notes the attempts that were made to try and co-enroll the customer. This will serve as documentation for monitoring purposes. If it becomes apparent that the customer is not interested in co-enrollment, then the WIOA representative should clearly state this decision in the customer’s case notes. After doing so, the WIOA representative should provide the customer’s name and seeker id to Derek Ault at Derek.Ault@jfs.ohio.gov and Debbie Marchek at Debbie.Marchek@jfs.ohio.gov to have the customer removed from future Co-Enrollment Referral Reports.

5. Question: If a customer fills out a form with their full Social Security Number (SSN) would we need to mask it retroactively? 01.07.22
Answer: If the SSN is included as part of a paper file or an electronic file other than OWCMS, then WIOA and/or TAA personnel must mask or truncate the number. The SSN may be fully listed in OWCMS. See Per WIOAPL 15-07.2 for additional information.

6. Question: I have a question about the customer flow and referral from the Trade side to WIOA. Normally when making my initial customer contact and Assessments I would refer my customer to contact their local OMJ Center to check on any additional services or assistance available. With our new process the Co-enrollment Referral Report is generated to the local WIOA program, and they should follow up with my customer within 30 days of notification. With that process in place, should I continue to refer my customers to reach out to the OMJ Center, or would I tell them to wait for the contact from WIOA? 01.07.22
Answer: Under the new procedures, the TDP should briefly educate the TAA-enrolled customer about the benefits of the WIOA program and should inform the customer that a WIOA representative will be in contact with them soon to provide them with more details and to gather some additional information for co-enrollment. At this time, the TDP should also inform the customer that he or she may immediately visit or contact the local OMJ Center to find out about available services. The customer does not have to wait for the WIOA staff member to contact him or her first.
III. CO-ENROLLMENT REFERRAL REPORT

1. Question: Are WIOA staff only to contact the customers on the referral list that in the case notes have explicitly been handed over to WIOA? **12.16.21**
   Answer: WIOA staff should contact all customers who are listed on their County’s copy of the Co-Enrollment Referral Report.

2. Question: Why are the same customers remaining on the Co-Enrollment Referral Report each week? **12.16.21**
   Answer: Customers will remain on the Co-Enrollment Referral Report until they are successfully co-enrolled. If a customer indicates that he or she does not choose to be co-enrolled, then the TAA or WIOA representative should clearly state this decision in the customer’s case notes. After doing so, the TAA or WIOA representative should provide the customer’s name and seeker id to Derek Ault at Derek.Ault@jfs.ohio.gov and Debbie Marchek at Debbie.Marchek@jfs.ohio.gov to have the customer removed from future Co-Enrollment Referral Reports.

3. Question: Will a County receive a Co-Enrollment Referral Report if there are no customers being referred? **12.16.21**
   Answer: Yes – The County will receive a report that indicates “no data available.”

4. Question: What action causes a customer to be added to the Co-Enrollment Referral report? Is this done when a Non-Registered Service in the IOP section of Trade is selected? (See screenshot below). **12.16.21**
   Answer: The customer’s receipt of the first Trade service triggers enrollment in TAA. At this time, he or she will be added to the Co-Enrollment Referral Report.

5. Why haven’t I received a Co-Enrollment Referral Report? **12.16.21**
   Answer: The report is emailed each Wednesday. Please check with your Supervisor to find out who has been named the designee recipient for your County. Updates to the distribution list may be made by contacting Dona Ferraro at Dona.Ferraro@jfs.ohio.gov.
6. **Question:** Can you share the names of who is currently receiving the Co-Enrollment Referral Report for each Area/County?  

**Answer:** Yes – an updated list will be forwarded by the end of January 2022.

IV. **TAA AND WIOA SERVICE COORDINATION**

1. **Question:** How long is the process for approval of the Trade training? In the past we have used WIOA until the Trade training was approved.  

**Answer:** Requests for training assistance for Trade-enrolled customers are approved within 10 workdays of submission to our support office.

2. **Question:** What are the typical services that a co-enrolled customer might receive from the WIOA side?  

**Answer:** There are many services that can be provided to a co-enrolled customer by WIOA depending on specific Local Area policies, including, but not limited to, job search, placement assistance, career counseling, job club, financial literacy, along with supportive services such as assistance with transportation; child and dependent care; housing, uniforms, work attire, and/or tools; applications, testing, and certification fees; and books, fees, and school supplies. Although it is envisioned that TAA will typically pay for a co-enrolled customer’s training, it is important to note that WIOA can also help with these costs, including occupational skills training; on-the-job training; pre-apprenticeship and apprenticeship; skills upgrading and retraining; and remedial education. The Co-Enrollment Possibilities List provides a full list of WIOA- and TAA- allowable services.

3. **Question:** How can WIOA support a participant in a Trade training that is either not in-demand or on the Training Provider is not in WIET.  

**Answer:** WIOA and TAA training requirements are similar. For a WIOA-funded ITA, the training provider and their approved program must be on WIET. For TAA, the training provider is not required to be on WIET; however, it must be a vendor of the state. It is allowable for WIOA to provide any of the array of basic career services and/or individualized career services to a co-enrolled participant that is enrolled in Trade training regardless of whether the TAA-funded training is included on WIET.

4. **Question:** What services does WIOA provide that Trade cannot do or have?  

**Answer:** There are many services that WIOA can provide along with Trade services, including, but not limited to, job search, placement assistance, career counseling, job club, financial literacy, along with supportive services such as assistance with transportation; child and dependent care; housing, uniforms, work attire, and/or tools; applications, testing, and certification fees; and books, fees, and school supplies. Although it is envisioned that TAA will typically pay for a co-enrolled customer’s training, it is important to note that WIOA can also help with these costs, including occupational skills training; on-the-job training; pre-apprenticeship and apprenticeship; skills upgrading and retraining; and remedial education. The Co-Enrollment Possibilities List provides a full list of WIOA- and TAA- allowable services.
5. **Question:** What type of training could WIOA pay for instead of TAA? 01.07.22
   **Answer:** It is envisioned that TAA will be the primary funding source for training services for a co-enrolled customer. However, some training activities may be suitable for WIOA funding, such as cooperative education, entrepreneurial training, and job readiness training. Additionally, certain basic skills courses such as CPR training to prepare for a job in healthcare or OSHA training for a career in manufacturing may be good fits for WIOA individualized career services funding.

6. **Question:** Can WIOA funds be used to pay for supportive services for a co-enrolled customer that is attending a TAA-funded training program that is not on WIET? 01.07.22
   **Answer:** Yes – It is allowable for WIOA to provide any of the array of basic career services and/or individualized career services, including supportive services to a co-enrolled participant that is enrolled in Trade training regardless of whether the TAA-funded training is included on WIET.

7. **Question:** Would you please clarify "there is no suitable employment available for the worker" - how is that determined? and if needed, how might that be documented? 01.07.22
   **Answer:** With respect to a training approval, a TAA customer must demonstrate that he or she cannot find employment in a similar occupation or in a job that pays a similar wage. Suitable employment is defined in Section 236(e) of the 2015 Act as work of substantially equal or higher skill level than the worker’s past adversely affected employment. Wages for such work at not less than 80 percent of the worker’s average weekly wage. Typically, this is determined by the job search efforts the customer has made since layoff to obtain suitable employment. This includes documented job search and results, lack of marketable skills, and LMI information (job not in demand). This will be annotated in the customer’s IOP.

V. **OWCMS INFORMATION**

1. **Question:** OWCMS deleted all of the information for one of my customers. Has anyone else encountered this situation? 12.16.21
   **Answer:** OWCMS will delete a customer’s eligibility information after 90 days (from intake date) if he or she does not receive a participating service (note-case notes are not deleted). If the customer later decides to participate, then TAA or WIOA personnel will need to collect and re-enter eligibility and other information, as applicable.

2. **Question:** Does TAA need to upload the Selective Service registration document into OWCMS, or just enter the registration number? 12.16.21
   **Answer:** Once the information has been verified by the Trade Delivery Professional (TDP), a copy of the registration form should be uploaded into documents in OWCMS.
3. **Question:** Should the documents that are uploaded into OWCMS be Word documents rather than PDFs since some of them are considered “living and breathing”? **12.16.21**
   **Answer:** TAA and WIOA personnel may choose to upload either Word or PDF documents based on their particular preferences.

4. **Question:** Do we need to redact the customer’s Social Security number when we are uploading a copy of the card into OWCMS? **12.16.21**
   **Answer:** Per WIOAPL 15-07.2, a Social Security number (SSN) is not required to be masked or truncated if the document is uploaded into OWCMS. If paper files or if the participant’s SSN is listed on other forms of source documentation listed in Attachment A of WIOAPL 15-07.2, staff must ensure that the SSN on the paper document has been truncated or masked (e.g., last four digits only). If a secondary electronic system other than OWCMS is used to store documents that contain Social Security information, the SSN must also be masked or truncated.

5. **Question:** Men born prior to 1960 are not required to register for Selective Service. Do we still need to search, screenshot, and upload this information prior to selecting Exempt on the OWCMS data tab? **12.16.21**
   **Answer:** It is acceptable to list in case notes that the individual is exempt from Selective Service registration without providing additional screenshots or uploads. The exemption notation should also be listed on the Co-Services Possibilities List.

6. **Question:** Would there be a way the customer could upload eligibility documents to their file that would be shared? **01.07.22**
   **Answer:** Currently there is no mechanism in place for a customer to upload documents into OWCMS. However, we may be able to pursue this functionality when we begin using ARIES in the upcoming year. Please note, that for WIOA purposes, staff members do not need to re-collect all eligibility documents from the customer. Instead, they may utilize an OWCMS screenshot of the customer’s Trade eligibility along with Selective Service registration, as applicable.

7. **Question:** I have been uploading resumes and other items that I think WIOA might be able to use to help with services, can WIOA see them when I upload them in the IOP? **01.07.22**
   **Answer:** Yes – once the customer has been co-enrolled, then the WIOA staff member can see all uploaded information in OWCMS.

**VI. STAFF TRAINING REQUESTS**

1. **Question:** We would like to have some training on how Trade approves a training type. WIOA sponsored trainings have to be in-demand and the Training Provider has to be on WIET. **12.16.21**
Answer: Trade approves training based on the needs of the customer to secure suitable employment in the existing job market. As with WIOA, the new occupation must be an in-demand occupation; however, the training provider is not required to be on WIET. The customer must meet the six criteria for training approval per CFR 618.610 as listed below:

- There is no suitable employment available for the worker,
- The worker would benefit from training,
- There is a reasonable expectation of employment following training,
- Training must be reasonably available to the worker,
- The worker is qualified to obtain and complete the training and has adequate financial resources to complete the training, which may extend after income support is exhausted, and
- The training is suitable and available at a reasonable cost.

2. Question: Can we get a refresher on the co-enrollment process? 12.16.21
   Answer: Yes – The Co-Enrollment Training Sessions that were held in November 2021 were recorded for reference purposes. Please contact Dona Ferraro at Dona.Ferraro@jfs.ohio.gov to request a copy of one or more of the recordings.

3. Question: Could we get training on the fourth quarter follow-up after employment? 01.07.22
   Answer: Yes – OWD plans to host additional co-enrollment training in early 2022. In the meantime, please refer to WIOAPL 15-07.2 Attachment B for the full listing of performance data linked to this measure.