WIOA-TAA Co-Enrollment

Staff Training

Session 2

November 9 or 10, 2021
Co-Enrollment Training – Session 2

- Welcome
- Refresher / Overview of Session 1 Training
- Flowcharts Outlining Customer Entering Via TAA
- Procedures and Tools
- Flowcharts Outlining Customer Entering Via WIOA
- Next Steps & Questions
Welcome

• Attendees are encouraged to introduce themselves using the chat function
• Please list your name, title, and location
Refresher - Programmatic Responsibilities

• Both
  • Ensure eligibility requirements are met
  • Communicate with the customer
  • Use Co-Services Possibilities List and OWCMS to document services and communicate with your WIOA or TAA counterpart

• TAA
  • Check the customer’s Selective Service registration status and note it in OWCMS
  • Provide the customer with a general introduction to the WIOA program

• WIOA
  • Ask the customer about the OhioMeansJobs location preference
  • Provide a participating service within 30 days of referral
Processes

• The following flowcharts outline how a customer who enters from TAA will be co-enrolled into WIOA.
WIOA-TAA CO-ENROLLMENT
Customer Arrives via Trade
Chart TAA-1

KEY
- TAA Delivers
- WIOA Delivers
- Co-Activity
- Notice of Petition Cert.

Dislocation Event

To Chart WIOA-1
No
Trade Certified?
Yes
Notice of Petition Cert.

TAA Worker List

Benefits Rights Information (BRI)

TAA Initial Assessment

TAA Enrollment

To Chart TAA-2
WIOA-TAA CO-ENROLLMENT
Customer Arrives via Trade
Chart TAA-2

KEY

TAA Delivers

WIOA Delivers

WIOA Supple. Intake & Eligibility

WIOA Co-Enrollment Pre-Check

Co-Enrollment Referral

Co-Enrollment

To Chart TAA-3

TAA Enrollment

TAA Co-Enrollment Pre-Check

From Chart TAA-1
WIOA-TAA CO-ENROLLMENT
Customer Arrives via Trade
Chart TAA-3

From Chart TAA-2

Co-Enrollment

WIOA Services

TAA Services

Co-Case Manage. & Co-Services

To Chart TAA-4

KEY

TAA Delivers

WIOA Delivers

Co-Activity

Notice of Petition Cert.
WIOA-TAA CO-ENROLLMENT
Customer Arrives via Trade
Chart TAA-4

From Chart TAA-3

Co-Case Manage. & Co-Services

No

WIOA services closed?

Yes

WIOA Follow Up

Co-Exit

WIOA Perform. & TAA Perform.

No

TAA services closed?

Yes

TAA Follow Up
Procedures and Tools:
TAA Introducing WIOA Information to Customer

• Discuss “enhancing” TAA services with WIOA activities
• Highlight career exploration as well as job referral and placement
• Inform that supportive services such as transportation assistance or dependent care may be available
• Let them know that WIOA staff will be contacting them soon
Procedures and Tools: WIOA Using Co-Enrollment Report

- Report is electronically generated on a weekly basis
- Customer’s county of residency serves as the referral location
- WIOA welcomes the customer and provides a participating service within 30 days of receipt of referral
- 100 percent of TAA enrollees will be referred to WIOA
Procedures and Tools: WIOA Welcoming Customer to Services

• Provide an overview of WIOA services offered through your location
• Ask customer where he or she would like to receive services (i.e., which OMJ location) and refer to another Local Area if requested
• Gather supplemental information
Procedures and Tools: Using the Co-Services Possibilities List

- Communication tool used to identify which services will be provided by which program
- Checklist format with areas for notes
- Living document that is updated throughout the customer’s progression in services
Procedures and Tools: Documenting Services on OWCMS

• Co-Services is a cornerstone of Ohio’s approach
• WIOA and TAA should actively use OWCMS to record the customer’s services, needs, and progress
Documenting Case Notes

<table>
<thead>
<tr>
<th>Note Date</th>
<th>Subject</th>
<th>Staff</th>
<th>Source</th>
<th>Action Date</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/22/2021</td>
<td>BASIC INTAKE</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/25/2021</td>
<td>CUSTOMER INFORMATION</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/25/2021</td>
<td>ELIGIBILITY</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/25/2021</td>
<td>SERVICES</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>03/04/2021</td>
<td>CUSTOMER INFORMATION</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>03/30/2021</td>
<td>CUSTOMER INFORMATION</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/22/2021</td>
<td>ASSESSMENT</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/23/2021</td>
<td>EMPLOYMENT PLAN</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/23/2021</td>
<td>ELIGIBILITY</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/26/2021</td>
<td>CUSTOMER INFORMATION</td>
<td></td>
<td>Basic Intake</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note:
Customer completed a remote registration for WIOA intake: completed WIOA electronic registration and uploaded resume. On 02/22/2021, provided a verbal signature to the Income and Family Size Form as well as the Participant Rights and Responsibilities Form. This verbal signature is in accordance with the Temporary WIOA Adult & Dislocated Worker Flexibility Guidance for COVID-19 that was issued on March 23, 2020. A copy of the Participant Rights and Responsibilities and Area 2 Complaint Rights Form have been emailed to the client. Customer signed the electronic registration.

Member provided source documentation (Driver’s License Social Security Card) supporting DOB of and U.S. Citizenship status. Member is registered with Selective Service. Member and family size is self.

Member completed self-attestation form to justify 6 month income of $5500. Customer’s prior employer was serving as a Delivery Driver making $9.50 an hour from 9/2019 to 2/2020. Customer states he was terminated due to a substantial lay off. Customer states he received a verbal notification. Customer provided UI documentation and is currently receiving Unemployment income. Member is seeking training assistance. Customer expresses interest in obtaining his CDL certification. Customer is a probable WIOA Dislocated Adult.

Work Capacity Initiated: Customer disclosed a situation with law enforcement that occurred in 2018 that could make hire a challenge.
Managing Documents
Individual Opportunity Plan (IOP)
Documenting/Closing Services

<table>
<thead>
<tr>
<th>Select</th>
<th>Program Affiliation</th>
<th>Service Name</th>
<th>Actual Start Date</th>
<th>Planned/Actual End Date</th>
<th>Services Outcome</th>
<th>CFIS Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TRADE</td>
<td>Enrolled in OJT</td>
<td>08/28/2021</td>
<td>08/28/2021</td>
<td>DID NOT COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TRADE</td>
<td>Enrolled in TAA</td>
<td>06/17/2021</td>
<td>06/10/2022</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Non-Registered Services**

<table>
<thead>
<tr>
<th>Select</th>
<th>Service Name</th>
<th>Service Date</th>
<th>Group</th>
<th>CFIS Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ATTENDED JOB SEARCH WORKSHOP</td>
<td>08/26/2021</td>
<td>WIOA Non-Registered</td>
<td>Trade Central Office</td>
</tr>
<tr>
<td></td>
<td>Rapid Response Re-Employment Session</td>
<td>03/25/2021</td>
<td>WIOA Non-Registered</td>
<td>Trade Central Office</td>
</tr>
</tbody>
</table>
Co-Exit
Procedures and Tools: Co-Exiting the Customer

• All services must be closed in both programs
• Customer is exited only when no benefits or services have been provided under either program for 90 days
• Customer is exited simultaneously from both WIOA and TAA
Processes

• The following flowcharts outline how a customer who enters from WIOA will be co-enrolled into TAA.
WIOA-TAA CO-ENROLLMENT
Customer Arrives via WIOA
Chart WIOA-1

Dislocation Event

No

Trade Certified?

Yes

To Chart TAA-1

WIOA Intake & Eligibility

WIOA Participating Service

WIOA Enrollment

To Chart WIOA-2

KEY

TAA Delivers

WIOA Delivers

Co-Activity

Notice of Petition Cert.
WIOA-TAA CO-ENROLLMENT
Customer Arrives via WIOA
Chart WIOA-3

KEY

TAA Delivers

WIOA Delivers

Co-Activity

Notice of Petition Cert.

From Chart WIOA-2

Co-Enrollment

WIOA Services

Co-Case Manage. & Co-Services

TAA Services

To Chart WIOA-4
WIOA-TAA CO-ENROLLMENT
Customer Arrives via WIOA
Chart WIOA-4

From Chart WIOA-3

Co-Case Manage. & Co-Services

TAA Services

WIOA Services

WIOA services closed?

Co-Exit

WIOA Perform. & TAA Perform.

TAA follow Up

WIOA follow Up

No

Yes

No

Yes
Next Steps & Questions

• Co-Enrollment Referral Reports will begin distribution on November 17
• Follow Up Q&A Sessions are scheduled for December 2 and 16

Key Contacts:
Debbie Marchek
Trade Program Delivery Manager
Debbie.Marchek@jfs.ohio.gov
330.206.8494

Jay Mendoza
Bureau Chief, Employment and Training Program Management
Jay.Mendoza@jfs.ohio.gov
614.704.8512