



# WIOA

Professional Development

The American Job Center logo is positioned at the bottom of the WIOA graphic, featuring a red star and the text 'americanjobcenter®'.

## WIOA SERVICES MATRIX: TITLE IB ADULT AND DISLOCATED WORKER SERVICES

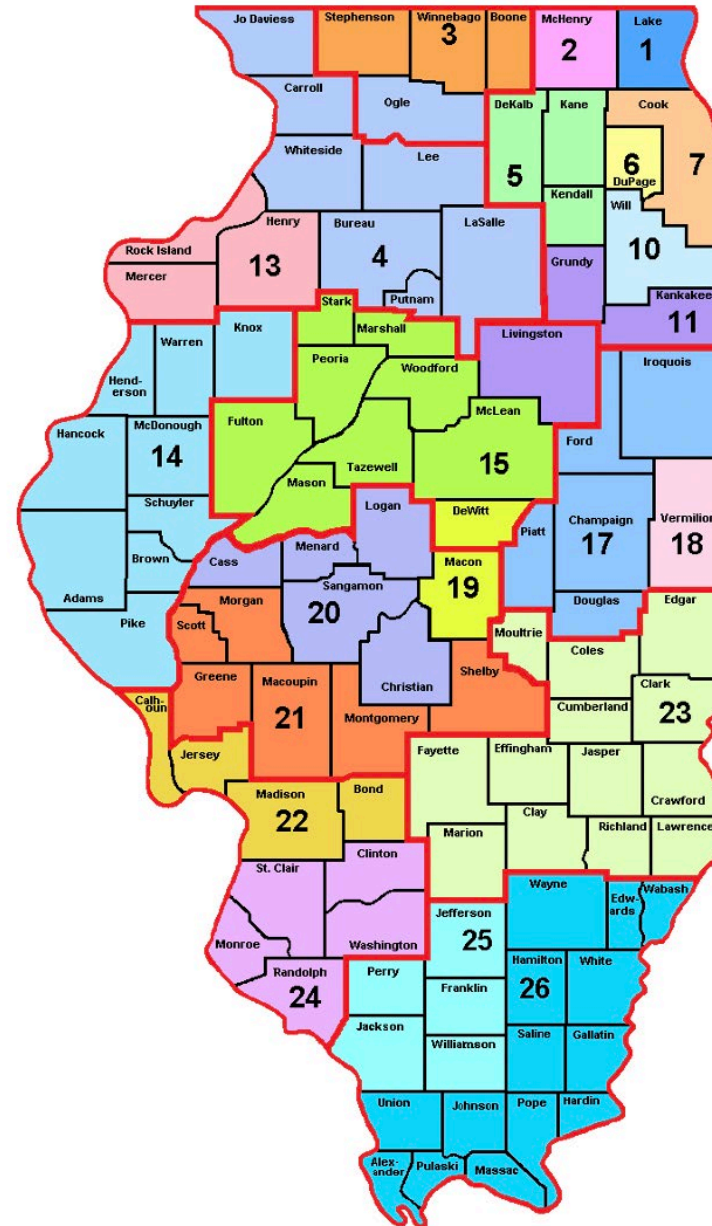
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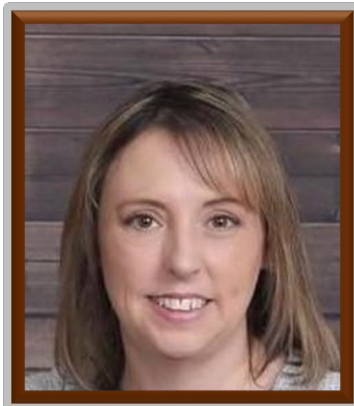
# Where is Your Local Area?





**Paula Barry**

Reporting and Performance  
Office of Employment and  
Training - OET  
Illinois Department of Commerce  
and Economic Opportunity

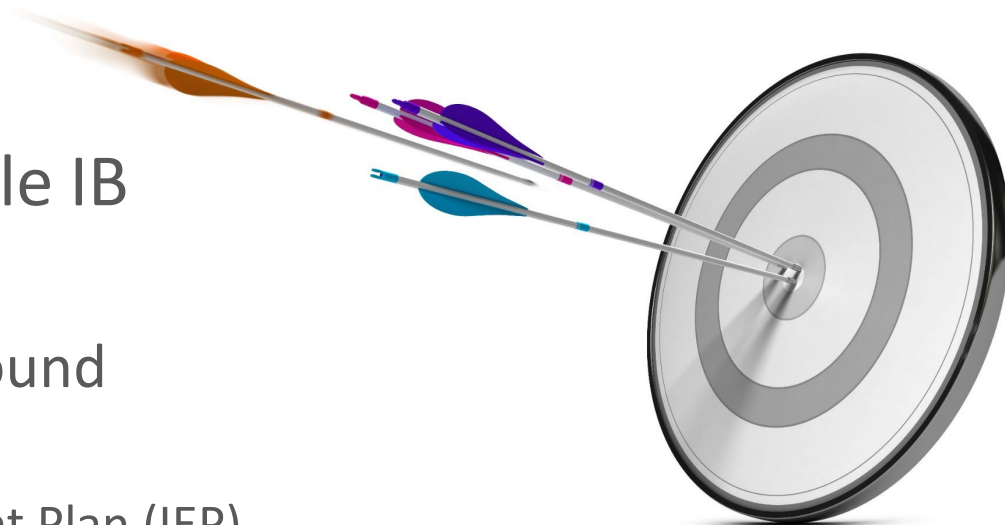


**Lora Dhom**

WIOA Policy Unit, Manager  
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Illinois Department of Commerce  
and Economic Opportunity

# Today's Objectives

- Share the Title IB Service Matrix Look and Feel
- Identify the Categories of IA/ID Services
- Review Service Definitions
  - What are the available Title IB Services?
- Outline How You Can Use the WIOA Title IB Services Matrix
  - Get Familiar with it and know your way around
  - Use it to facilitate your daily activities
    - Tool for Development of Individual Employment Plan (IEP)
    - Performance Reporting guide



# What is the WIOA Title IB Services Matrix?

*The one reference tool for clear, concise, up to date services information.*

- Series of interrelated tables that contain and define WIOA Title IB Participant Services in relation to Service Type/ PIRL Element/ System ID/ Performance Impact
- A Structured Policy Driven Reference Tool that Organizes Services by:
  - **Adult and Dislocated Worker Career and Training Services,**
  - **Youth Program Elements,**
  - **Supportive Services,**
  - **Follow-Up, and**
  - **Work-Based Learning**
- The Services Matrix expands beyond Title IB formula grants to include additional non-formula grant services such as the Disaster Recovery National Disaster Workforce Grants (NDWG) and Youth Career Pathways (YCP).

WIOA OMB Control Number 1205-0521, TEGL 19-16, and TEGL 10-16, CH 2 Attachment VII Table A Participant Level Services Chart									
WIOA BASIC AND INDIVIDUALIZED CAREER Services - (PIRL Data Element Nos. 1000, 1002-1004, 1007, 1100-1113, 1115-1116, 1200-1203, 1205-1207, 1210-1211)									
Staff-Assisted and Individual Career Services: WIOA Title I Adult and Dislocated Worker DRAFT									
PIRL - Types of Career Services	PIRL DATA ELEMENT NO.	PIRL Field Type	Career Service/Activity Label (IWDS)	IWDS Table Value	Definition	*WIOA Performance Measure(s)	MTE - 50%	Same Day Service?	
<b>Basic Career Services (STAFF-ASSISTED):</b>									
Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)	1003, 1004, 1102	Date	<u>Initial Assessment of Skill Levels &amp; Other Needs (STAFF ASSISTED)</u>	805	Collecting preliminary information about the individual's skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs. The initial assessment is intended to be a brief, preliminary information gathering process that, among other things, provides sufficient information about an individual's basic literacy and occupational skill levels to enable appropriate referrals to services available through the One-Stop operator and partner programs.  The initial assessment can also capture intake information about eligibility and additional details - such as work history, educational attainment levels, income and family status - that support initial conversations about the career service and training needs of the individual. While this initial step of assessment provides an important administrative function, staff must also consider the opportunities for utilizing the initial assessment as a first step in the programmatic engagement of the individual. Individualized career and/or training services identified through the initial assessment offer the starting point for engaging in a comprehensive and specialized assessment process. <b>NOTE: This basic career service differs from individualized (817) "Comprehensive and Specialized Assessments" because is provided initially to gather preliminary information (requiring staff assistance) whereas, the latter is more in-depth assessments of a participant.</b>	Employment Measures	N/A	Yes	
Job Search Assistance (STAFF ASSISTED)	1003, 1004, 1104	Date	<u>Job Search Activities and Assistance (STAFF ASSISTED)</u>	466	Activity in which the Career Planner assists customers in a one-on-one setting in the job search process including locating relevant job openings, <b>resume writing</b> and setting up interviews with potential employers.	Employment Measures	N/A	Yes	

# What is the Services Matrix?

## • DCEO-OET Resource for Participant Services

- Includes Service Types and Definitions
- Covers WIOA Title IB and non-formula grant services, i.e., National Dislocated Worker Grant (NDWG)

## • Standardized Reference Tool categorized by:

- Adult and Dislocated Worker Career and Training,
- Youth Program Elements,
- Supportive Services,
- Follow-Up, and
- Work-Based Learning

PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
Basic Career Services (STAFF ASSISTED): "Basic Career" (STAFF ASSISTED) are services that require staff involvement to determine the participants' need or level of services that would benefit them through participation in the Adult or Dislocated Worker program.						
Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)	Skill Upgrading and Entrepreneurial Si	Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED) Initial steps of customer engagement. Collecting preliminary information about the individual's skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs. The initial assessment is intended to be a brief, preliminary information-gathering process that, among other things, provides sufficient information about an individual's basic literacy and occupational skill levels to enable appropriate referrals to services available through the One-Stop operator and partner programs. The initial assessment can also capture intake information about eligibility and additional details - such as work history, educational attainment levels, income, and family status - that support initial conversations about the career service and training needs of the individual. While this initial step of assessment provides an important administrative function, staff must also consider the opportunities for utilizing the initial assessment as a first step in the programmatic engagement of the individual. Individualized career and/or training services identified through the initial assessment offer the starting point for engaging in a comprehensive and specialized assessment process. NOTE: This basic career service differs from the Individualized Career Service "Comprehensive and Specialized Assessments" because it is provided initially to gather preliminary information (requiring staff assistance) whereas, the latter is more in-depth assessments of a participant.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMEN/DWER	No	Yes	

# Understanding the Common Language

PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
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NOTE: This basic career service differs from the Individualized Career Service "Comprehensive and Specialized Assessments" because it is provided initially to gather preliminary information (requiring staff assistance) whereas, the latter is more in-depth assessments of a participant.						

## Five categories of WIOA IA/ID Services

- Basic Career STAFF ASSISTED
- Individualized Career
- Training
- Supportive
- Follow-Up



# Understanding the Common Language

## What are the three general **types** of services?

### 1. Enrollment Services

- Triggers participation
  - Enrollment makes an individual a WIOA participant (registrant).
  - Service record or episode extends participation by resetting the clock on the “90-Day Rule” for exit.
- Extends 90-Day Exit Window
  - Each additional service (or episode) begins a new 90-day window to program exit date.
  - Extends participation period and exit.
  - Related to 90-Day Exit rule compliance.
  - Column on Matrix – “Triggers Participation/Extends 90-Day Exit Window (Enrolled Service)”

### 2. Non-Enrollment Services and Activities

- Services or activities that continue supporting the education or employment plan, but don’t trigger participation or extend the exit date.



# Understanding the Common Language

What are the three general **types** of services?

## 3. Same-Day Services

- Staff-assisted services and activities that are completed in one day.
- Same-day service can be provided on one or more days, but each occurrence is considered another episode.
- The service or activity start and end on the “same day”.
- Services cannot be left open.
- Episodes are added to one, original record.
- Case notes are required.



# Understanding the Common Language

## Services have relationships to:

- **WIOA Performance Measures**
  - Matrix - “\*Performance Measure(s)”
    - This column lists all WIOA performance measures that will apply to participants enrolled in each service.
    - Column indicates service will be counted in the measure (denominator) and outcomes are reported.
    - Career Services and Training Services relate to certain measures.
- **Minimum Training Expenditure Requirement (MTE) – 50%**
  - Matrix – “MTE – 50%”
    - Service may contribute to the 50% Minimum Training Expenditure (MTE).
    - When a participant is enrolled in services indicating “Yes”, the costs associated with the service may count towards the LWIB’s 50% rate.

PLEASE  
NOTE

### Note

Service “rules” may apply to definitions, documentation, and reporting.

# Understanding the Common Language

## The Rules that apply to services are found in:

- **Definitions:** circumstances and expectations that are created by provision of the services and are tied to policy
- **Documentation:** provision of certain services must be validated and supported by appropriate recording of activities by data entry and uploading documents in MIS
- **Reporting:** timely data entry and reporting of appropriate activities and services in MIS as they occur to have complete data integrity, accurate tracking of participant services, and full accountability of the program
- **Case Management Systems:** The system has edits that track the timing and follow through of the services.
- **Integrity:** Prompt, complete, and thorough case management service delivery actions from application all the way through exit and follow-up services is critical
- **Accountability:** 10-day Rule for adding services to MIS



# MIS Service Entry General Rules

- Don't put actual services listed in the Matrix under the *Career Planning (Case Management) Service*.
- Document every service in the MIS within 10 days of it being provided.
- Ensure the services are outlined in the Individual Employment Plan.
- Services screen will list all services provided so that anyone looking at the client can easily see what services have been provided.
- Case Notes/Episodes are used to tell the story about the service.
- There is no required sequence or order for IA/ID services.



# WIOA Title IB Services Matrix - Demo

WIOA Services - PIRL OMB Control Number 1205-0521, TEGL 19-16, and TEGL 10-16, CH 2 Attachment VII Table A Participant Level Services Chart						
WIOA BASIC AND INDIVIDUALIZED CAREER SERVICES - (PIRL Data Element Nos. 1000, 1002-1004, 1007, 1100-1113, 1115-1116, 1200-1203, 1205-1207, 1210-1211)						
Staff-Assisted Basic and Individualized Career Services: WIOA Title I Adult and Dislocated Worker <b>DRAFT</b>						
PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
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Job Search Assistance (STAFF ASSISTED)	<u>Job Search Activities and</u>	Activity in which the Career Planner assists participants in a one-on-one setting in the job	Employment Measures			

IA ID Staff-Assist & Ind Career

IA ID Training Services

YOUTH Program Elements

Supportive Services (SS)

Follow-Up Services

Work-Based Learning (WBL)

Disaster Recovery DRE

# IA/ID Basic Career Services - Definition

## Basic Career STAFF-ASSISTED

- Services that prompt enrollment in WIOA and are provided with significant Title IB staff assistance
- Generally, these services involve less staff time and involvement and include services such as: eligibility determinations, initial skill assessments, labor exchange services, provision of information on programs and services, and program referrals.

PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
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# IA/ID Basic Career Services - Rules

## Basic Career STAFF-ASSISTED

- **Six** Basic Career Services included in the Services Matrix are all “STAFF-ASSISTED”
- All are Same-Day Services
- ALL are Enrollment Services
- Relationship to WIOA Performance
  - Employment Measures
    - Employment Rates 2nd and 4th Quarter after Exit
    - Median Earnings 2nd Quarter after Exit

**PLEASE NOTE**

### Note

There is no required sequence or order for providing Career Services.

PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
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<p>IA ID Staff-Assist &amp; Ind Career    IA ID Training Services    YOUTH Program Elements    Supportive Services (SS)    Follow-Up Services    Work-Based Learning (WBL)    Disaster Recovery DRE</p>						



# IA/ID Basic Career Services

## What are the available IA/ID WIOA STAFF ASSISTED Basic Career Services?

- Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED) **NEW Label and Definition**
  - Formerly – Asset Development
- Job Search Activities and Assistance (STAFF ASSISTED)
- Referred to Employment/Placement Assistance (STAFF ASSISTED)
- Career Counseling/Guidance Services (STAFF ASSISTED) **NEW Label and Definition**
  - Formerly – Individual Job Development
- UI Filing Information (STAFF ASSISTED)
- Assistance Establishing Eligibility for Financial Aid (STAFF ASSISTED)

# IA/ID Basic Career Services - Demo

WIOA Services - PIRL OMB Control Number 1205-0521, TEGL 19-16, and TEGL 10-16, CH 2 Attachment VII Table A Participant Level Services Chart						
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Staff-Assisted Basic and Individualized Career Services: WIOA Title I Adult and Dislocated Worker <b>DRAFT</b>						
PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
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Job Search Assistance (STAFF ASSISTED)	<u>Job Search Activities and</u>	Activity in which the Career Planner assists participants in a one-on-one setting in the job	Employment Measures			

IA ID Staff-Assist & Ind Career

IA ID Training Services

YOUTH Program Elements

Supportive Services (SS)

Follow-Up Services

Work-Based Learning (WBL)

Disaster Recovery DRE

# IA/ID Basic Career Services - Application

## Question:

- Can I have my client in multiple open services?

## Answer:

- Yes. Career planners must document every allowable service provided to a client into the management information system (MIS).





# IA/ID Basic Career Services - Application

## *Service Highlight*

### *Referred to Employment/Placement Assistance (STAFF ASSISTED)*

#### **Rules for Reporting Service:**

- Document when Title I staff played a direct role in placing a participant in employment.
- Staff may have a relationship with an employer leading to placement.
- Take credit for active involvement with the employment outcome.

# IA/ID Individualized Career Services - Definition

## Individualized Career Services:

- Must be provided to participants after American Job Center staff determine that such services are required to retain or obtain employment, consistent with any applicable statutory priorities.
- Generally, these services involve significant staff time and customization to each individual's need.
- Individualized career services include services such as:
  - Specialized assessments,
  - Developing an individual employment plan (IEP),
  - Counseling, and
  - Work experiences (including transitional jobs)

Staff-Assisted Basic and Individualized Career Services: WIOA Title I Adult and Dislocated Worker						
PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
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# IA/ID Individualized Career Services - Rules

## Individualized Career Services

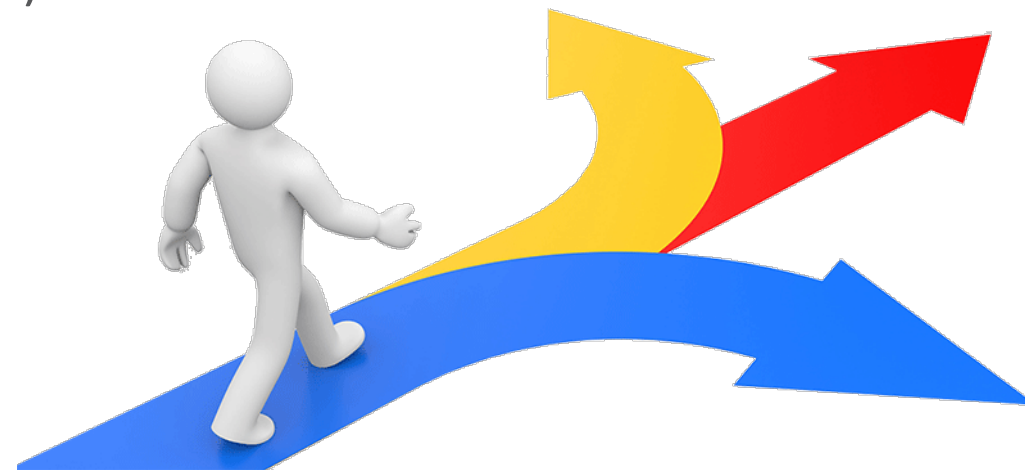
- Must be identified in the Individual Employment Plan (IEP)
- Analytical, informed assessments to develop employment strategies requiring in-depth communication with WIOA staff
- Outline next steps to succeed through participation and after program exit.
- **Nine** Individualized Career Services (5 are WBLs)
- Some are Same-Day; some may be left open
- ALL are Enrollment Services
- Relationship to WIOA Performance -
  - Employment Measures
  - Employment Rates 2nd and 4th Quarter after Exit
  - Median Earnings 2nd Quarter after Exit

PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
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# IA/ID Individualized Career Services

## What are the available WIOA Individualized Career Services for IA/ID?

- Comprehensive and Specialized Assessments
- Development of an IEP
- Group Workforce Research/Workshops/Job Clubs
- Career Planning (Case Management)
- Short-Term Prevocational Services (Job Readiness)
- Work-Based Learning (WBL)
  - WBL - Paid WEX/Internship
  - WBL - Unpaid WEX/Internship
  - WBL - Pre-Apprenticeship
  - WBL - Job Shadowing
  - WBL - Transitional Jobs
- Workforce Preparation Activities
- Out-of-Area Job Search/Relocation Assistance
- English Language Education



# IA/ID Individualized Career Services - Demo

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WIOA BASIC AND INDIVIDUALIZED CAREER SERVICES - (PIRL Data Element Nos. 1000, 1002-1004, 1007, 1100-1113, 1115-1116, 1200-1203, 1205-1207, 1210-1211)						
Staff-Assisted Basic and Individualized Career Services: WIOA Title I Adult and Dislocated Worker <b>DRAFT</b>						
PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
<b>Individualized Career Services:</b> "Individualized" Career Services require significant staff involvement and focus on specific plans, strategies, and services that have been developed and evolved from BASIC career explorations. These individualized services focus on participant engagement and require active participation to ensure a participant will succeed in the employment they have determined is the most appropriate and best chance of successful, long-term outcomes.						
Comprehensive and Specialized Assessment	<u>Comprehensive and Specialized Assessments</u>	This service is provided to make determinations of participants' skill levels and service needs. It is used to record diagnostic tests and comprehensive and/or specialized assessments, including in-depth interviews and evaluations, of participants barriers to employment, occupational goal(s) and career pathway, along with the occupational knowledge, skills, and abilities associated with that goal and pathway, and service needs. This service may include interpreting the results of assessment tools as well as in-depth interviewing and evaluation to identify employment barriers and appropriate employment goals. Other assessments may include: a) Prevailing local labor market conditions, including the unemployment rate, local employer skill demands and hiring prerequisites; and b) Transferable skills that the job seeker may possess that would be of interest to other local employers.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER	No	Yes	Yes
Development of IEP	<u>Development of an IEP</u>	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.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER	No	Yes	Yes



# IA/ID Individualized Career Services - Application



## Question:

- What is the difference between an *Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)* service and the *Comprehensive and Specialized Assessments* service?

## Answer:

- The *Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)* service is a Basic Staff Assisted Service which is a cursory assessment and the *Comprehensive and Specialized Assessments* an Individualized Career Service which is a more staff-involved comprehensive assessment.

## Basic Career (STAFF ASSISTED)

### Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)

- Brief Initial Discovery and Conversations
- Completion of gathering of information related to eligibility
- Starting point
- Engagement that leads to enrollment and future assessments
- Identify next steps
- Document basic interaction

## Individualized Career

### Comprehensive and Specialized Assessments

- In-Depth Assessment & Analysis
- Testing, Learning details about Abilities & Skills
- On-going throughout participation
- Not brief, thorough
- Carry Out/Steps identified in the Initial (basic) service
- Active participation, work towards individual's goals



# IA/ID Individualized Career Services - Application

## *Service Highlight*

### *Development of an Individual Employment Plan (IEP)*

#### Rules for Reporting Service:

- Same-Day Service - Episodes are required
- Service matrix is the most important reference tool for developing comprehensive, successful IEPs.
- Policy Rules:
  - Must be developed after an objective assessment and reflect the interests and needs of the participant. Once developed, it must be signed by the participant and properly documented in the MIS.
  - Required to be one of the first services provided to an Adult or Dislocated Worker participant since it describes the ongoing strategy for the participant to achieve their goals.
- Relationships:
  - An IEP, if provided alone, triggers all Employment measures.

# IA/ID Individualized Career Services - Application

## Question:

- What is the main difference between *Career Counseling and Guidance (STAFF ASSISTED)* service and the *Career Planning (Case Management)* service?

## Answer:

- The *Career Counseling and Guidance (STAFF ASSISTED)* service is a Basic Staff Assisted Service in which staff has general discussions with clients about careers. *Career Planning (Case Management)* is an Individualized Career Service that encompasses more staff-involved day-to-day conversations/one-on-one in-depth counseling.



## Basic Career (STAFF ASSISTED)

### Career Counseling and Guidance

- Beyond Information “Only”
  - Staff provides information on careers and in addition, helps an individual understand and apply information to ensure informed choices are made.
- Examples are working with the individual to review the ETPL and Demand Occupations or other WIOA services that may be of interest.
- Work to start conversations to begin assessing needs and other options that help the individual to achieve goals.
- Provide details about programs that an individual would not learn without the staff’s assistance.
- Decide next steps and future planning.

## Individualized Career

### Career Planning (Case Management)

- Beyond Information: Day-to-Day Career Planning based on one-on-one in-depth counseling, taking next steps.
- Individual Discovery and Analysis of personal needs:
  - Supportive Services, etc.
- Strategic next steps and identification of programs and service enrollments.
- Setting specific dates for enrollment into services, working with employers or training program providers on behalf of the participant.
- Goals are determined to prepare and coordinate employment plans.

## IA/ID Individualized Career Services - Application



### Question:

- I'm working on an IEP with my client. The definition for *Short-Term Prevocational Services (Job Readiness)* and *Workforce Preparation Activities* look like they provide some of the same activities or impart similar skills. They just graduated from nursing school, and we are assisting them in studying for exams for their license. Is either of these services appropriate to provide?

### Answer:

- Yes. *Short-Term Prevocational Services (Job Readiness)* would be appropriate.

## Short-Term Prevocational Services (Job Readiness)

- For individuals who lack occupational credentials/certifications and require short-term services to enhance/upgrade skills for employment. May include services that:
  - Prepare individuals for licensing or certification exams; and
  - Enhance the employability of individuals who already possess occupational skills in demand but lack up-to-date skills required in most workplaces hiring for the occupation.
- Includes OSHA 10 trainings, CPR/First Aid classes, ServSafe courses, basic computer classes, and other short-term courses that do not end in a credential.

## Workforce Preparation Activities

- The knowledge, skills, and competencies that prepare individuals to obtain or retain employment or to advance in the workforce.
- “Soft Skills”
- Skills acquired through workforce preparation are not career- or industry-specific skills.
- Essential employability skills are those general skills that are required to be successful in all sectors of the labor market and are separate from the technical skills attained in career pathways or academic skills such as math and reading.

## Additional Episode vs General Case Note - Rules

### Question:

- If a participant contacts me via a phone message or email to inform me of their progress with the training, should I enter it as a "General" case note or should I add an episode to the *Career Planning* or *IEP* services?

### Answer:

- Determine what was accomplished. Consider what transpired during and after the call.
- Next slide provides context.





## Additional Episode vs General Case Note - Rules

- **Episode** = A service is provided when staff uses the information to determine a course of action or next steps for a participant.
  - For example, if the participant shares a note from an employer or provides grades or other information that would alter service delivery:
  - This is a *Career Planning* service, and a service EPISODE is the method of documentation.
  - Participants will remain in the program for at least 90 more days before exit is determined.
- **General Case Note** = A service has NOT been provided when communication is two-way but is "Information ONLY".
  - 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 since no service is provided.

# Additional Episode vs General Case Note - Rules

## Should I document an EPISODE?

- YES, if:
  - WIOA Staff is providing assistance necessary for an individual to successfully complete WIOA services and activities.
  - Productive efforts by Staff or client resulting in actionable steps to carry out IEPs, enroll in services or place in employment.
  - Justifies need for additional assistance from Staff.
  - Might be the date of exit if no other service needed

## Should I add a CASE NOTE ONLY?

- YES, if:
- Only providing brief updates, confirmations of status or, employment verification.
  - No actionable steps are identified by staff or individuals.
  - No request for help or assistance.
  - Will not align with the exit date.

### Note

“General” and “Standard” Case Notes are both referring to a case note that is NOT attached to a service episode.

# Work-Based Learning

PIRL Data Element Name	Program	Service/Activity Label (IWDS)
Summer Employment/Internships during the summer (WIOA Youth) - Summer Months are defined in IL as May 1st through September 30th.	IY ONLY	<u>WBL - Paid WEX/Internship (Youth Limited to Summer Months)</u> <u>WBL - Unpaid WEX/Internship (Youth Limited to Summer Months)</u>
Employment Opportunities, Including Internships, not limited to summer months**	IA, ID, IY	<u>WBL - Paid WEX/Internship (Not Limited to Summer Months)</u> <u>WBL - Unpaid WEX/Internship (Not limited to Summer Months)</u>
Pre-Apprenticeship Programs	IY, IA, ID	<u>WBL - Pre-Apprenticeship</u>
Job Shadowing	IY, IA, ID	<u>WBL - Job Shadowing</u>
On-the-Job Training (WIOA Youth)*, **	IY ONLY	<u>WBL - OJT - Private Sector (Youth)</u> <u>WBL - OJT - Public Sector (Youth)</u>
Transitional Jobs	IA, ID, DWG	<u>WBL - Transitional Jobs</u>
Incentives	IY ONLY	<u>Cash Incentives (Youth)</u>

\* YOUTH OJTs are Career Level/Work-Based Learning Experiences (WBL). This differs for WIOA IA and ID.

\*\*Youth OJT (839, 840) and/or \*\*Employment Opportunities Not Limited to Summer Months (445, 446) are NOT recorded in IWDS when the service is directly related to the participant's Pre-Apprenticeship. These activities must be selected in a dropdown when adding a Pre-Apprenticeship service.

**Work-Based Learning (WBL):**  
 Allows employers to train their employees while continuing to be productive members of the workforce.

- “Earn and Learn”
- WBLs are categorized as Individualized Career Services and are not WIOA Training services
- Definitions expanded in IA/ID Career Tab
- Relationships:
  - Performance Measures
  - MTE -50%

 Stephanie Green will be our OET point of contact

# Work-Based Learning - Demo

WIOA Services - PIRL OMB Control Number 1205-0521, TEGL 19-16, and TEGL 10-16, CH 2 Attachment VII Table A Participant Level Services Chart						
WIOA BASIC AND INDIVIDUALIZED CAREER SERVICES - (PIRL Data Element Nos. 1000, 1002-1004, 1007, 1100-1113, 1115-1116, 1200-1203, 1205-1207, 1210-1211)						
Staff-Assisted Basic and Individualized Career Services: WIOA Title I Adult and Dislocated Worker <b>DRAFT</b>						
PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
Internships and Work Experiences (including transitional jobs)	<b>WBL - Paid WEX/Internship</b>	A work experience or internship is a planned, structured learning experience that takes place in a workplace or at a worksite for a limited period of time. A work experience or internship may be arranged within the private-for-profit sector, the non-profit sector, or the public sector. The work experience or internship is <b>paid</b> , as appropriate and consistent with other laws, such as the Fair Labor Standards Act.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER	Yes	No	Yes
	<b>WBL - Unpaid WEX/Internship</b>	A work experience or internship is a planned, structured learning experience that takes place in a workplace or at a worksite for a limited period of time. A work experience or internship may be arranged within the private-for-profit sector, the non-profit sector, or the public sector. The work experience or internship is <b>unpaid</b> , as appropriate and consistent with other laws, such as the Fair Labor Standards Act.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER	Yes	No	Yes
	<b>WBL - Pre-Apprenticeship</b>	A program designed to prepare individuals to enter and succeed in a Registered Apprenticeship program that has a documented partnership with an employer and at least one, if not more, Registered Apprenticeship program(s) which includes all of the following: a) Training and curriculum that aligns with the skill needs of employers in the economy of the State or region and that has been designed to prepare participants to meet the minimum entry-level requirements of the Apprenticeship. b) Access to educational and career counseling, and other supportive services as needed by participants. c) Hands-on meaningful learning activities that are connected to education and training activities, such as Career Exploration and Career Development Experiences, and that reinforce foundational professional skills including, at a minimum, those outlined in the Essential Employability Skills framework. d) Upon successful completion of the program, participants are provided continued support and assistance in the application process to facilitate entry into a Registered Apprenticeship program and may receive preference for enrollment.  A quality pre-apprenticeship program is one that also incorporates inclusive recruitment of underrepresented individuals and strives for credential acquisition. For a more in-depth definition of pre-apprenticeship in Illinois see the IWIB Apprenticeship Illinois Committee Work Group's Approved Definition for Pre-Apprenticeship.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER	Yes	No	Yes

WIOA Services - PIRL OMB Control Number 1205-0521		
WIOA Work-Based Learning (WBL) Experiences - (PIRL Data Element No. 1205, 1-7)		
WIOA Title I Adult, Youth, and Dislocated Workers WBL <b>DRAFT</b>		
PIRL Data Element Name	Program	Service/Activity Label (IWDS)
Summer Employment/Internships during the summer (WIOA Youth)	IY ONLY	<b>WBL - Paid WEX/Internship (Youth Limited to Summer Months)</b>
Summer Months are defined in IL as May 1st through September 30th.		<b>WBL - Unpaid WEX/Internship (Youth Limited to Summer Months)</b>
Employment Opportunities, Including Internships, not limited to summer months**	IA, ID, IY	<b>WBL - Paid WEX/Internship (Not Limited to Summer Months)</b>
		<b>WBL - Unpaid WEX/Internship (Not limited to Summer Months)</b>
Pre-Apprenticeship Programs	IY, IA, ID	<b>WBL - Pre-Apprenticeship</b>
Job Shadowing	IY, IA, ID	<b>WBL - Job Shadowing</b>
On-the-Job Training (WIOA Youth)*, **	IY ONLY	<b>WBL - OJT - Private Sector (Youth)</b>



# Questions or Comments

## Submittal of Questions or Comments

- Each LWIA identify a point person in your office(s) to gather and submit Questions or Comments
- Submit each through [WIOA Title IB Performance FAQ](#) page
- Keep them general, brief and applicable to twenty-two LWIA representatives
- Questions should not contain Participant names, addresses, or other PII

## Responses to Questions or Comments

- Weekly [Open Q&A](#) sessions scheduled each Wednesday beginning with February 15, 2023 (1:00pm) Performance Offices Hours
- Be prepared to present the question during the weekly [Open Q&A](#) for OET to respond
- Posted to [WIOA Title IB Performance FAQ](#) page





# What's Next in WIOA Services Matrix Technical Assistance?

The following Listing of Topics and Dates is for ALL Users of the Illinois Workforce Development System (IWDS) or Illinois Workforce Integration System (IWIS) on Illinois workNet®. **If located in LWIA 7 and use the Career Connect reporting system, please check with your Administrator or contact the Help Desk for dates of Technical Assistance.**

- **February 14, 2023: 1:00 – 2:30pm**  
Adult and Dislocated Worker Career and Training Services
- **February 16, 2023: 1:00 – 2:30pm**  
Adult and Dislocated Worker Support and Follow-Up Services
- **February 28, 2023: 1:00 – 2:30pm**  
Youth Services Matrix - Session 1
- **March 2, 2023: 1:00 – 2:30pm**  
Youth Services Matrix – Session 2
- **March 21, 2023: 1:00 – 2:30pm**  
Services Matrix FAQ, Highlights and Summary



[Register to receive email notifications of Workforce Professional Development opportunities by joining the Email List Serve](#)

All Webinars are recorded and will be available on the [Illinois workNet Videos and Training Materials](#)

# Resources

- [Workforce Innovation and Opportunity Act: Public Law; Final Rules, Joint Rule and Labor Only](#)
- [Workforce Innovation and Opportunity Act Section 116\(c\)](#)
- [U.S. DOL Training and Employment Guidance Letter \(TEGL\) No. 10-16, Change 1, Performance Accountability Guidance for Workforce Innovation and Opportunity Act \(WIOA\) Title I, Title II, Title III, and Title IV Core Programs](#) (August 23, 2017)
- [TEGL No. 14-18, Aligning Performance Accountability Reporting, Definitions, and Policies Across Workforce Employment and Training Programs Administered by the U.S. Department of Labor \(DOL\)](#) (March 25, 2019)





# OET Contacts



**Illinois**  
**Department of Commerce**  
& Economic Opportunity  

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**OFFICE OF EMPLOYMENT & TRAINING**

## WIOA Policy Questions

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## WIOA IWDS/Systems Questions

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**thank you**