Intensive/Training - Policy 1 Client Flow

The following table indicates the behavioral steps and required Delaware Job Link entry for individuals on the training path:

|  |  |  |
| --- | --- | --- |
| Worker Function | DJL Function | Area |
| Determine if client already has an existing account | Search DJL.  | One StopCore  |
| Registration  | Create a New Account or Update an Existing Account. | One StopCore |
| Create a Labor Exchange Enrollment | Opens Job Service Link under Program Registrations. | One StopCore |
| Conduct Assessment Interview | Enter Services under Service & Training (S&T) Plan Link.**Client watches a video explaining DET services and is given a Green Sheet with available services – client makes self determination as to whether they are interested in training. Interested clients are handed a training packet with further instructions.** | One StopCore |
| **Referral to WIA Training Unit** | **Client returns training packet****Enter Services under LE Enrollment S&T Plan Link****Supervisor – Reviews client’s DJL registration to ensure they are active. Enter Referral to WIA Individual Orientation when client is assigned to a case manager.** | IntensiveTraining |
| Review Eligibility (Eligibility date is the date eligibility was determined) | **Case Manager -** On the Case Details Screen, click on the Demographic Information link, enter the eligibility date, and update the demographics information as necessary. This opens the Workforce Investment Act Link – click on the link and continue to the Add Enrollment screen.At this point, case manager needs to Verify Demographics Information. If all necessary documentation to support eligibility is available, the case manager can check the validation box. If not, case manager needs to enter the client’s username and client password | Intensive Training |
| Nothing | **Case Manager -** On the Add Enrollment Screen, enter the Enrollment Date (the Enrollment Date should always be the same date as the Eligibility Date), and select the appropriate funding source. This creates a “Pending” Enrollment.. | Intensive Training |
| **Eligibility Determination** | **Case Manager – Add Service – Eligibility Determination - Enter in the Service & Training (S&T) Plan – Status should reflect Completed.**The estimated start, actual start date, estimated end, and actual end date should be the same as the Eligibility and Enrollment date.  | Intensive Training |
| Complete an Assessment/Planning Service  | **Case Manager -** Add Service – Assessment/Planning Service - Enter in the Service & Training (S&T) Plan – Status should reflect In-Progress.  The estimated and actual start dates should be the same as the Eligibility and Enrollment date. The estimated end date should be the tentative training start date.Please Note: When adding the Assessment & Planning Service, it is only necessary to select a Service Type, enter “DOL / DET” in the Training Agent ID field, select a Status, and complete the appropriate Date fields. The rest of the information on the screen is automatically populated by the system when the service is saved. | Intensive Training |
| Begin the Individual Service StrategyPresent Case to Selection Panel | **Case Manager -** Insert a Program Note on the WIA Program Details Screen stating ISS can be found in Participant FolderCase reviewed by panel (accepted or cut)**Case Manager enters a Program Note indicating outcome of selection meeting. Supervisor enters a comment note in the case on the Pending Case list. If not selected, case is denied and no further activity occurs.** | Intensive Training |
| Complete an Occupational Skills Training Service (for cases selected by panel) | **Case Manager -** Add Service – Occupational Skills Training Service (OST)-Enter in the Service & Training (S&T) Plan – Status should reflect Proposed.  Case Manager will be responsible for creating a budget. If it is a new client a paper budget will be created. If it’s a returning client a budget can be created in the system. Please Note: When adding an OST, click on the Training Providers Link at the top of the screen, search for the appropriate Provider and Program, and click on the Add to Training Plan Link at the bottom of the Program screen -- this automatically adds the provider and program information to the Service Details screen.The estimated start date should be the tentative training start date. The estimated end date should be the tentative end date of the semester or program. | Intensive Training |
| Case Management Folder is sent to Supervisor **(within 7 business days of case being presented to Panel).**  | **Supervisor** - will Approve, Return, or Deny the Enrollment through their Pending Enrollments List. (At this point, if case is approved, client becomes an “Open/Approved Enrollment” and counts for Performance. | Intensive Training |
| Client Returns to Sign ISS/Training Plan | After supervisor approval is given, the client returns for a meeting with case manager to sign ISS/Training Plan (See Policy 12).  |  |
|  | **Case Manager** goes into DJL and creates the budget |  |
| Existing Client Returns for Additional Funding (OST’s need to be created for those with full Pell grants)  | Client brings copy of Student Schedule/Bill and book estimates to case manager. Case manager creates new S&T for OST as proposed for the upcoming semester and creates the budget. Supervisor reviews request and either approves or returns. **If PELL grant or other grant is received, case manager enters grant information in the WIA Enrollment under the Educational Grant Link** |  |
| Confirm client start training | The **case manager** will change the OST status from Proposed to In- Progress Supervisor will process payment. The case manager will go into the existing Assessment/Planning Service and insert an Actual End Date and change Status to CompletedRefer to Policy 15 – Requirements for Entering an OST | Intensive Training |
| Supportive Service Request | **Case Manager -** add Service – Supportive Services – enter in the S&T Plan as completed each time a supportive service payment is approved. |  |
| Confirm client didn’t start training | **Case Manager** will e-mail supervisor and provider to confirm client did not started training. A Program Note on the WIA Program Details Screen will also be entered then Supervisor can move forward with the de-obligation of funds.**Case Manager** will go into the existing Assessment/Planning Service and insert an Actual End Date and change Status to Completed.**Case Manager** will go into the existing Occupational Skills Service and insert an Actual End Date and change Status to Failed to Report.**Case Manager -** add Service – Job Search and Placement Assistance – enter in the S&T Plan the The estimated start, actual start date, estimated end, and actual end date should be the same date. Refer to IJS Policy. | Intensive Training |
| Complete contacts while client is in OST or in Job Search and Placement Assistance | **Case Manager** - Enter updates in the Program Notes on the WIA Program Details screen. | Intensive Training |
| Confirms completion of Training Obtain verification of Credential | **Case Manager** - Go into the existing Occupational Skills Training Service and insert an Actual End Date and change Status to CompletedEnter details on the WIA Program Detail Screen (Outcomes, Third Quarter After Exit Links). | Intensive Training |
| Client begins Job Search and Placement Assistance for a Ninety Day Period | **Case Manager** - Enter updates detailing services being provided in the Program Notes section on the WIA Program Details screen.Add Service – Job Search and Placement Assistance – enter in the S&T Plan the estimated start, actual start (**the day after** training completion date) estimated end date, and actual end date should reflect the same date. Refer to IJS PolicyAll services provided to client during the job search phase should be entered with appropriate S&T under the LE Enrollment Link. Program Notes documenting services should continue under the WIA Program Detail Screen.  | Intensive Training |
| Confirm Job Placement | **Case Manager** - Enter job placement details under the Job Placement Link on the Case Details Screen.Add Service –Follow-Up Services – Enter in S&T Plan Achieved Day 1 Outcome  | Intensive Training |
| Obtain verification of 30, 60, and 90 Days of Employment  | **Case Manager** - add Service –Follow-Up Services – Enter in the S&T Plan Achieved Day 30 Outcome, Follow-Up Services – Achieved Day 60 Outcome, and Follow-Up Services – Achieved Day 90 Outcome as appropriate | Intensive Training |
| Nothing | System generates Exit -90 days after the last entered estimated end or actual end date of last service (typically Job Search and Placement Assistance) if no other activity is inputted. | Intensive Training |
| Place placement information, wage information, credential information in folder | **Case Manager** - after the case exits, Complete Outcome and Wages Information on the WIA Program Detail Screen. | Intensive Training |

General Rules Associated with Client Flow:

**Every service for client, every contact with the client, etc., should be notated through the completion of a program note in DJL. Notes should be created on the WIA Program Details Screen.**

First when determining eligibility the case manager should first confirm whether or not client is a Dislocated Worker by completing the Dislocated Worker Checklist (this completed form needs to be included in the Participant File). Remember a Dislocated Worker is a Dislocated Worker until he/she is making 90% of the wage they were earning at the time of “Dislocation” layoff.

If it is determined client is a Dislocated Worker the next step is for case manager to establish whether or not client had a stable work history (stable work history is being defined “at a minimum” of three years with one employer within the last seven years. If a stable work history is established, only the pertinent information on the ISS needs to be completed and the focus of the assessment/planning phase should be on the CASAS testing, Interest testing, and discussing the following options with the client:

* Part time or full time training
* Part time work and full time training
* Full time work and part time training
* What field of training is the client interested in
* Does the type of training interested in make the most sense for the client

Effective Date: June 1, 2009

Revised Date: August 14, 2009

Revised Date: May 17, 2010

Revised Date: June 4, 2010

Revised Date: September 9, 2010

Revised Date: July 14, 2011

Revised Date: July 18, 2012

Revised Date: October 12, 2012

Revised Date: January 30, 2013

Revised Date: May 1, 2013

Revised Date: June 13, 2013