Intensive Training Policy 17 - Procedure for Approving Cases

The purpose of this procedure is two-fold.

First, it’s imperative that DOL/DET present clients with a consistent message statewide.

Secondly, when E&T Administration is confronted with handling a complaint, it provides a clear and concise picture as to reason why the client wasn’t chosen for training.

The following script and method of ranking for approving training cases will be reviewed at every WIA Training orientation beginning July 1, 2010.

Script

Cases are approved on the basis of need and the expectation of successful benefit. Because funds are limited, all cases cannot be approved. No case is considered approved until it is reviewed by the Training Unit, and approved by the Supervisor.” The “basis of need and expectation of successful benefit review” is completed once a week when the Training Unit case managers get together with their Supervisor and rate the requests for training. Each individual request is ranked based on the same rating criteria. The rating criteria will be shared with the client.

Rating Criteria:

|  |  |
| --- | --- |
| Category | Points |
| Veterans Preference | 5 |
| Past Work History | 20 |
| Timeliness with Submitting Requested Documentation and information | 20 |
| Assessment Results/ Rationale as to why the client should receive Training | 25 |
| Listed Local Job Openings & Reasonableness for the plan to achieve the expected results | 15 |
| Starting Wage at Completion of Training | 15 |

The process for rating/ranking is as follows:

First, the case manager will provide all members of the review team with a copy of the Individual Employability Plan. They will then verbally present each plan to be considered (maximum 10 minutes). After all plans have been presented, the training team will rate/rank the proposed cases as follows”

* The supervisor assigns each rater with a 2 digit number (supervisor keeps a record. numbers are unique by session)
* Each rater with a pencil will rate each individual proposal based on the rating criteria(s) found on the rating sheets
* Each rating is totaled
* After all ratings are totaled, they are then ranked on the rating sheet in the rating rank column. The highest rating becomes your number one etc.
* If you have a tie in a rank you must break it
* At this point two independent individuals must come in and check the math and initial the rating sheets.
* The individual rating ranks are then put on the flip charts to arrive at a Group Ranking.
* The ranks are totaled
* The lowest total rank becomes number one and so on
* Approvals continue until the goal is reached or until the review team determines that the remaining cases do not have sufficient merit to approve.
* Of the remaining unapproved cases, the group will reconsider the plan at the next meeting. The maximum number of times a plan can be reconsidered is 2.

General Rules:

* Supervisors will maintain the complete written documentation of all meetings
* Case managers should never tell a client that there is no funding unless a script has been received from the Director.
* Case managers should never tell a client that they already have marketable skills.
* All discussions and ratings are confidential and should not be shared with clients.

Please Note: It is imperative during the implementation stage that case managers and supervisors alike utilize the Help Desk to keep E&T Administration in the loop as to what is working and what is not working.

Acknowledgement Statement:

I certify that the above script and ranking process was reviewed at the WIA Training Orientation that I attended.

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Client Signature Date

Effective Date: July 1, 2010

Revised Date: April 26, 2011