**Intensive/Training - Policy 31 Dislocated Worker Training (DWT) NEG ITA Client Flow**

The following table indicates the behavioral steps and required Delaware Job Link entry for individuals seeking an ITA funded with DWT NEG:

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| --- | --- | --- |
| **Worker Function** | **DJL Function** | **Area** |
| Face to Face meeting with client to discuss career assessment and types of training opportunity | Case notes should be entered in the Job **Service Link** under **Program Notes**. | Hudson Training Case Manager |
| Obtain and Review Eligibility (Eligibility date is the date eligibility was determined)  Enable and Open WIA Dislocated Worker Enrollment  In addition to the requirements described in Intensive/Training Policy 4 for eligibility documentation, 2 more items need to be documented if the client is determined to fall within the following categories:   1. **Long term unemployed status** (27+ consecutive weeks of unemployment starting from the date of dislocation) 2. **Reemployment Services (RES) participant** (as documented through the WPRS enrollment in DJL) | **Case Manager – Request to Supervisor to have Client office re-assigned to Hudson if needed.**  On the Case Details Screen, click on the Demographic Information link, enter the eligibility date, and update the demographics information as necessary.  Critical to DWT NEG: In the demographics, under the Layoff Details, review and revise if necessary the date enter in the Actual or projected Termination or Layoff date. This date should match the documentation. This date compared to the date of the first service in the NEG-DE07-DWT S&T will be used to determine if the client is long term unemployed.  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.  **When adding enrollment always choose “non-stimulus funding”** | Hudson Training Case Manager |
| Eligibility Determination  Determined the client is eligible from a review of collected documentation. | Case Manager – Add Service – Eligibility Determination - Enter in the **Dislocated Worker** 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. | Hudson Training Case Manager |
| Complete an Assessment/Planning Service | **Case Manager -** Add Service – Assessment/Planning Service - Enter in the **Dislocated Worker** 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**. | Hudson Training Case Manager |
| Enable and open the NEG – DWT Link | Case Manager – One the Case Details Screen click on Demographic Information, scroll down to the layoff details section, click edit go to the NEG Enrollment at the bottom and choose **NEG-DE07-DWT** | Hudson Training Case Manager |
| Complete an Occupational Skills Training Service | **Case Manager -** Add Service – Occupational Skills Training Service (OST)-Enter in the **NEG – DWT** Service & Training (S&T) Plan – Status should reflect Proposed.  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.  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.  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. | Hudson Training Case Manager |
| Begin the Individual Service Strategy (see General Rule 5) | **Case Manager -** Insert a Program Note on the WIA Program Details Screen stating ISS can be found in Participant Folder | Hudson Training Case Manager |
| Case Management Folder is sent to Supervisor **(within 3 business days)** | **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.  Supervisor will upload required documents. **See Policy 26.** | Hudson Training Supervisor |
| 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). | Hudson Training Case Manager |
| Create Budget/Funding Authorization Voucher (FAV) in DJL (within 2 business days of case approval) | **Case Manager** goes into DJL and creates the budget within the existing OST service within the NEG-DE07-DWT enrollment. | Hudson Training Case Manager |
| Approve Budget | Supervisor approves budget. **See policy 19** | Hudson Training Supervisor |
| Confirm client start training | The **case manager** will change the OST status in the **NEG-DWT Enrollment** from Proposed to In- Progress Supervisor will process payment.  The case manager will go into the existing Assessment/Planning Service in the **Dislocated Worker Enrollment** and insert an Actual End Date and change Status to Completed  Refer to Policy 15 – Requirements for Entering an OST | Hudson Training Case Manager |
| Supportive Service Request | **Case Manager -** add Service – Supportive Services – enter in the **Dislocated Worker** S&T Plan as completed each time a supportive service payment is approved. | Hudson Training Case Manager |
| Confirm client didn’t start training  At this point we would also see if an OJT could be developed for client. See policy 30 for referral process. | **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 estimated start, actual start date, estimated end, and actual end date should be the same date. Refer to Policy 9-IJS Policy. | Hudson Training Case Manager |
| 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. | Hudson Training Case Manager |
| Determine if client would benefit from OJT | **See Policy 30** | Hudson Training Case Manager |
| Confirms completion of Training  Obtain verification of Credential | **Case Manager** - Go into the existing Occupational Skills Training Service in the **NEG-DWT Enrollment** and insert an Actual End Date and change Status to Completed  Enter details on the WIA Program Detail Screen (Outcomes, Third Quarter After Exit Links). | Hudson Training Case Manager |
| 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 of the **Dislocated Worker Enrollment** 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 Policy  All 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. | Hudson Training Case Manager |
| 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 in the **Dislocated Worker Enrollment** Achieved Day 1 Outcome | Hudson Training Case Manager |
| Obtain verification of 30, 60, and 90 Days of Employment | **Case Manager** - add Service –Follow-Up Services – Enter in the S&T Plan in the **Dislocated Worker Enrollment** Achieved Day 30 Outcome, Follow-Up Services – Achieved Day 60 Outcome, and Follow-Up Services – Achieved Day 90 Outcome as appropriate | Hudson Training Case Manager |
| 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. | Hudson Training Case Manager |
| 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. | Hudson Training Case Manager |

General Rules Associated with Client Flow:

1. All clients must be dually enrolled in WIA Dislocated Worker and NEG-DE07-DWT.
2. Every client enrolled must have their office re-assigned to Hudson for staff access.
3. 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.
4. 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.
5. 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

1. Case managers may request the training caps established in Intensive/Training Policy 8 be waived. This must be requested prior to case approval and is at the sole discretion of the Supervisor.

Effective Date: November 7, 2013