



WIOA

Professional Development

The American Job Center logo, featuring a stylized 'A' and 'J' in blue and red, with the text 'americanjobcenter®' below it.

WIOA SERVICES MATRIX: TITLE IB ADULT AND DISLOCATED WORKER SERVICES

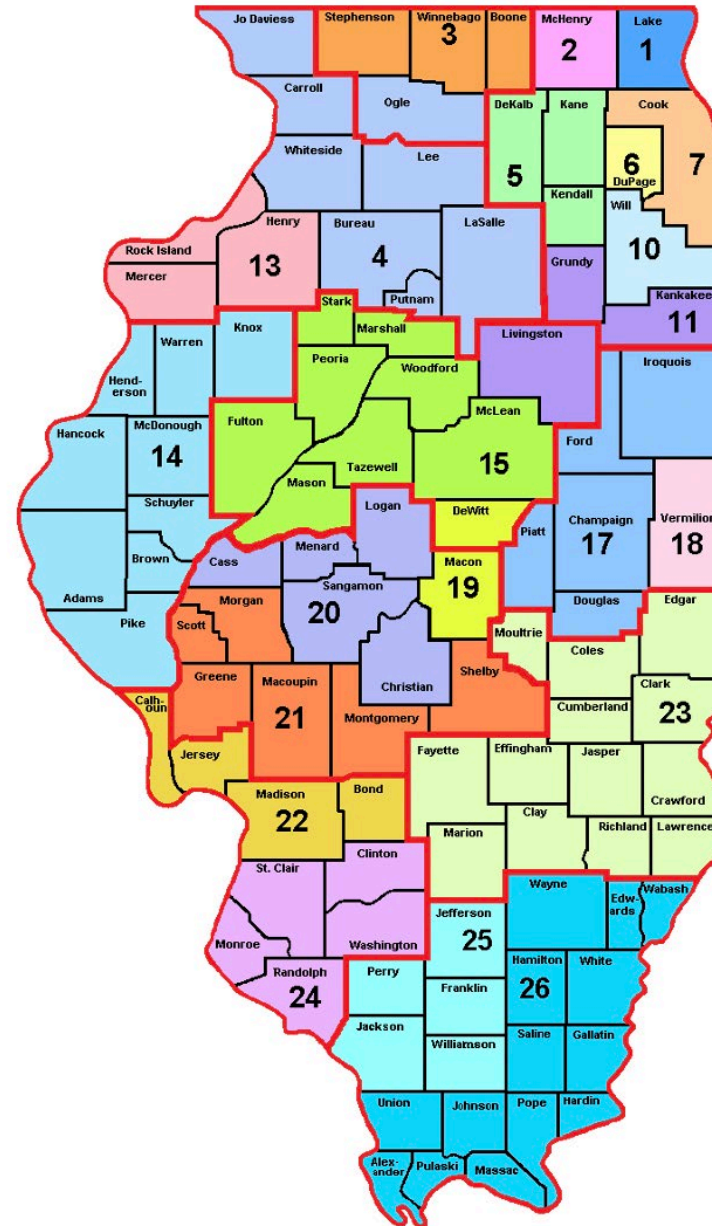
February 16, 2023



Kiersten Baer

- Digital Communications Manager
 - Illinois Center for Specialized Professional Support
- kmbaer@ilstu.edu
- 309-438-1838

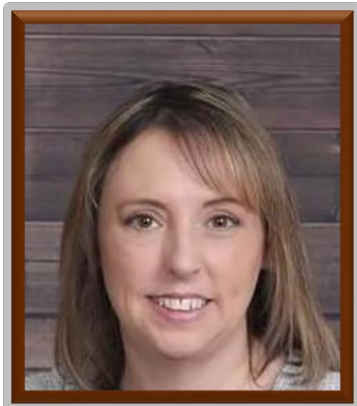
Where is Your Local Area?





Paula Barry

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



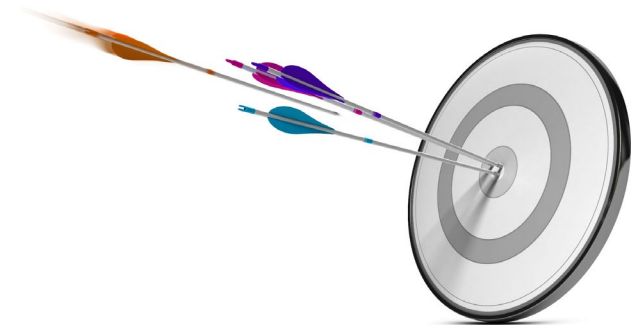
Lora Dhom

WIOA Policy Unit, Manager
Office of Employment and
Training - OET
Illinois Department of Commerce
and Economic Opportunity

02/14/23 Services Matrix Recap

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



REVIEW

- Understanding Common Language
- Basic Career Services & Individualized Career Services
- Demonstrations, Definitions, Rules & Practical Applications

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?	
Basic Career Services (STAFF-ASSISTED):									
Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)	1003, 1004, 1102	Date	<u>Initial Assessment of Skill Levels & 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. 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.	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, resume writing 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)		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)
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)	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.	Employment Measures AEEB2/DEER2 AEEB4/DEER4 AMER/DMER	No	Yes	Yes
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

IA/ID Training Services - Definition

Training Services:

- Training services, when determined appropriate, must be provided either through an Individual Training Account (ITA) or through a training contract
 - IEPs must be in place
 - ETPL requirements apply to ITA-funded programs
 - Local Boards must establish ITA policies. They may limit WIOA funding for or the duration of a participant’s training program.

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 TRAINING Services - (PIRL Data Element No. 1300, 1-12)				
Training Services: WIOA Title I Adult and Dislocated Workers				
Training Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service Contributes to the Minimum Training Expenditure Requirement	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
<u>OJT - Private Sector</u>	OJT is provided under a contract with an employer or registered apprenticeship program sponsor in the private non-profit or private sector. Through the OJT contract, occupational training is provided for the WIOA participant in exchange for the reimbursement, typically up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and supervision related to the training. LWIAs must consider skill requirements of the occupation, participant's academic and occupational skill, work experience and the IEP. An OJT contract must be limited to the period of time required for participant to become proficient in the training related occupation. Illinois ETPL requirements do not apply.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures AMSG/DMSG	Yes	Yes
<u>OJT - Public Sector</u>	Same as OJT just provided in the Public Sector. All provisions listed for OJT - Private Sector apply here.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures AMSG/DMSG	Yes	Yes
<u>Skill Upgrading and Retraining</u>	Short-term or part-time training designed to upgrade skills in the workplace and provide retraining to enhance current skills. Courses that provide an occupation changing type of instruction to prepare persons for entrance into a new occupation through instruction in new and different skills demanded by technological changes. Further, these are courses promoting skills upgrading to train incumbent workers in specific skills needed by that business or industry and that lead to potential career growth and increased wages. This includes courses that develop professional competencies that are particularly relevant to a vocational/occupational goal as specified in the Individual Employment Plan (IEP). It must be demonstrated that the training will result in the workers' acquisition of transferable skills that result in an industry-recognized certification or credential. Training program must be on the Illinois ETPL.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures ACAR/DCAR AMSG/DMSG	Yes	Yes
<u>Entrepreneurial Skills Training</u>	Entrepreneurial skills training must provide the basics of starting and operating a business. These skills include but are not limited to, developing budgets and forecasting resource needs, business plan development, securing financing, general business law concepts, employee management, and the understanding of marketing concepts. Training program must be on the Illinois ETPL.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures ACAR/DCAR	Yes	Yes

IA/ID Training Services - Rules

Rules and Relationships

- Performance Measures
 - Credential Attainment Rate and/or Measurable Skill Gains (MSGs)
- ITA funded training
 - ALL Successful training program completions should result in a post-secondary Credential and MSG.
- Contract funded training
 - Post- secondary credentials do not apply, these should result in Measurable Skill Gains (MSG).
- (MTE) – 50% applies to all.

PLEASE NOTE

Note

Same-Day Services do not apply to Training Services

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 TRAINING Services - (PIRL Data Element No. 1300, 1-12)				
Training Services: WIOA Title I Adult and Dislocated Workers				
Training Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service Contributes to the Minimum Training Expenditure Requirement	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
<u>OJT - Private Sector</u>	OJT is provided under a contract with an employer or registered apprenticeship program sponsor in the private non-profit or private sector. Through the OJT contract, occupational training is provided for the WIOA participant in exchange for the reimbursement, typically up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and supervision related to the training. LWIAs must consider skill requirements of the occupation, participant's academic and occupational skill, work experience and the IEP. An OJT contract must be limited to the period of time required for participant to become proficient in the training related occupation.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures AMSG/DMSG	Yes	Yes
	Illinois ETPL requirements do not apply.			
<u>OJT - Public Sector</u>	Same as OJT just provided in the Public Sector. All provisions listed for OJT - Private Sector apply here.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures AMSG/DMSG	Yes	Yes
<u>Skill Upgrading and Retraining</u>	Short-term or part-time training designed to upgrade skills in the workplace and provide retraining to enhance current skills. Courses that provide an occupation changing type of instruction to prepare persons for entrance into a new occupation through instruction in new and different skills demanded by technological changes. Further, these are courses promoting skills upgrading to train incumbent workers in specific skills needed by that business or industry and that lead to potential career growth and increased wages. This includes courses that develop professional competencies that are particularly relevant to a vocational/occupational goal as specified in the Individual Employment Plan (IEP). It must be demonstrated that the training will result in the workers' acquisition of transferable skills that result in an industry-recognized certification or credential.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures ACAR/DCAR AMSG/DMSG	Yes	Yes
	Training program must be on the Illinois ETPL.			
<u>Entrepreneurial Skills Training</u>	Entrepreneurial skills training must provide the basics of starting and operating a business. These skills include but are not limited to, developing budgets and forecasting resource needs, business plan development, securing financing, general business law concepts, employee management, and the understanding of marketing concepts.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures ACAR/DCAR	Yes	Yes
	Training program must be on the Illinois ETPL.			

IA/ID Training Services

What are the available WIOA Training Services for IA/ID?

- On-the-Job Training (OJT) - Private Sector
- On-the-Job Training (OJT) - Public Sector
- Skill Upgrading and Retraining
- Entrepreneurial Skills Training
- WIOA Title IB Funded Adult Education w/Training (ICAPS programs.)
- English Language Education
- Customized Training
- Occupational Skills Training
- Prerequisite Training
- Registered Apprenticeship Program (RAP)
- Planned Gap/Holding
- Training Paid by NON-WIOA Title I Funds



IA/ID Training 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				
WIOA TRAINING Services - (PIRL Data Element No. 1300, 1-12)				
Training Services: WIOA Title I Adult and Dislocated Workers DRAFT				
Training Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service Contributes to the Minimum Training Expenditure Requirement	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
Customized Training	<p>Training activity provided under a contract that is designed to provide training to adults and dislocated workers to meet the special requirements of an employer or group of employers. To be considered a countable training expenditure, the customized training:</p> <ul style="list-style-type: none"> a) May not be more than 50% of the total training cost; and b) Must be with an employer who: <ul style="list-style-type: none"> i. Agrees to hire WIOA participants upon completion of the customized training; and ii. Are training employed workers who: <ul style="list-style-type: none"> 1) Do not earn wages at a self-sufficiency level and to whom the employer commits to continue to employ; and 2) Are being trained in new technologies, new production or service procedures, who require additional skills or workplace literacy required for employment, or for other appropriate purposes identified by local boards. <p>Illinois ETPL requirements do not apply.</p>	<p>Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER</p> <p>Training Measures AMSG/DMSG</p>	Yes	Yes
Occupational Skills Training	<p>An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels. Such training must be specified in the participants individual Employment Plan (IEP) and be of sufficient duration to impart needed skills and lead to a recognized postsecondary credential. Such programs should be outcome orientated and focused on an occupational goal specified in the IEP.</p> <p>Training program must be on the Illinois ETPL.</p>	<p>Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER</p> <p>Training Measures ACAR/DCAR AMSG/DMSG</p>	Yes	Yes
Prerequisite Training	<p>A prerequisite course is defined as a course that is required or necessary as a prior condition to enter into a program of study. Postsecondary or advanced level course or another requirement that a student must have taken prior to enrolling in a specific course or program. Preparatory courses that may provide a participant with the knowledge or skills to enroll in another training such as entry, intermediate or advanced level postsecondary or occupational skills training. Training program must be on the Illinois ETPL. Required for application or CORE component of the program.</p> <p>Training program must be on the Illinois ETPL.</p>	<p>Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER</p> <p>Training Measures ACAR/DCAR AMSG/DMSG</p>	Yes	Yes
Registered Apprenticeship Program (RAP)	<p>An apprenticeship program registered with the U.S. Department of Labor meeting the standards defined by USDOL under 29 CFR Part 29, Subpart A. It is an employer-driven model that combines on-the-job training with job-related instruction in curricula tied to the attainment of industry-</p>	<p>Employment Measures AEER2/DEER2</p>		

IA/ID Training Services - Application

Rules and Relationships Application

- *Customized Training, On-the-Job Training (OJTs), Skill Upgrading and Retraining*
 - ALL are IA/ID Training Services
- Rules for Reporting in MIS
 - *OJTs* and *Skill Upgrading and Retraining* services are NOT added for a participant in MIS if provided under a current *Registered Apprenticeship Program (RAP)* enrollment.
 - *Skill Upgrading* and *OJTs* are documented within the *RAP* service by indicating “YES” for each when applicable.
- Relationships to Performance
 - *OJTs* and *Customized Training* only relate to the Training MSG measure, NOT the Credential measure
 - NO ETPL Requirement
 - Training does not lead to a post-secondary credential
 - *Skill Upgrading and Retraining* are related to Credential Attainment and MSG.
 - ETPL Requirements apply

IA/ID Training Services - Application

Question:

- If a participant is planning to enroll in a *Registered Apprenticeship Program (RAP)* and the model includes a *Skill Upgrading and Retraining* up front and an *OJT* towards the end of the program, how is that recorded?

Answer:

- ONLY one training record should be recorded. The *RAP* should be added for the participant, and the *Skill Upgrading and Retraining* and *OJT* are to be documented within the *RAP* service by indicating “YES” for each.



IA/ID Training Services - Application

Service Highlight

WIOA Title IB Funded Adult Education w/Training

Rules for Service:

- Adult education and literacy activities (including English language acquisition (ELA) activities) provided **concurrently and contextually** with workforce preparation activities and workforce training for a specific occupation or occupational cluster for the purpose of educational and career advancement.
- The Illinois Community College Board (ICCB)'s Integrated Career & Academic Preparation System (ICAPS) meets that definition. The program is the implementation of the Integrated Education and Training (IET) model in Illinois.



IA/ID Training Services - Application

Service Highlight - continued

WIOA Title IB Funded Adult Education w/Training

Rules for Service:

- ICAPS/IET career pathway programs must be approved by the Illinois Community College Board (ICCB) to ensure the three components of integrated education and training are provided concurrently as well as contextually as required.
- ICAPS programs must be on the Eligible Training Provider List.
- [Integrated Career & Academic Preparation System \(ICAPS\)](#)

IA/ID Training Services - Application

Question:

- If a participant needs adult education and literacy activities to obtain a high school equivalency, can WIOA Adult or Dislocated Worker funds pay for it?

Answer:

- Not unless it is part of an ICAPS program on the Eligible Training Provider List (ETPL).
- Since WIOA Adult or Dislocated Worker funds cannot fund stand-alone adult education and literacy activities (e.g., adult education, high-school equivalency, etc.), career planners must refer the participant to a Title II Adult Education provider for those services.



IA/ID Training Services - Application

Activity Highlight

Training Paid by NON WIOA Title I Funds

Rules for Reporting Service:

- This non-enrollment activity should only be recorded in specific circumstances as a mechanism to indicate when a WIOA participant is **co-enrolled** in another partner program and is being provided a training service NOT funded by WIOA Adult or Dislocated Worker (IA/ID) and is also receiving WIOA IA/ID individualized career services.
- The career planner must provide justification for the need for wrap-around WIOA services to meet the participant's employment goals that are outlined in the Individual Employment Plan (IEP).

Relationships to Performance:

- This “other” type of training documentation will NOT flag participants for inclusion in the Training measures unless they are provided with an additional WIOA-funded training service.

IA/ID Training Services - Application

Question:

- My participant is a WIOA Title I Dislocated Worker who received a couple of individualized career services before their Trade Adjustment Act (TAA) petition was approved. They are co-enrolled in TAA which will be funded their training and WIOA will pay for childcare so they can attend training. How should this be recorded?

Answer:

- LWIAs should add the *Training Paid by NON WIOA Title I Funds* activity so there is a clear record to support funding supportive services under WIOA. Must be documented in IEPs as well.
 - The career planner must also indicate the program providing the training service in the Individual Employment Plan (IEP) and case notes as well as document the program on the Concurrent Programs screen.
 - When a participant is co-enrolled, the following must be coordinated across the programs: IEP; Services; and Exit.



IA/ID Training Services - Application

Service Highlight

Planned Gap/Holding

Rules for Reporting Service:

- Participants who have a planned gap in WIOA Title IB services of greater than ninety (90) days must not be considered as exited **if** the gap in service is due to one of the following circumstances:
 - service. A delay before the beginning of training;
 - A health/medical condition or providing care for a family member with a health/medical condition; or
 - A temporary move from the area that prevents the individual from participating in services, including military
- The planned gap in WIOA Title IB services may not last more than one hundred eighty (180) consecutive calendar days from the date of the most recent service.
- All planned gaps in service must be documented in the MIS and include the reason for the gap and the anticipated return date to complete program services.

IA/ID Training Services - Application

Service Highlight – continued

Planned Gap/Holding

Rules for Reporting Service:

- Pre-determined gaps in participation can be documented and the individual will retain WIOA participant status and not be exited per the “90 Day No Service” rule.
- Documentation must be provided and kept in file to support the circumstance - medical or other.
- If deemed necessary in an IEP, the participant may receive career services while waiting to resume WIOA training activities. However, no other services are required to be open alongside a planned gap.
- If no other services are being provided and open, the participant will show on “90 Days NO Service” reports.
- Planned Gaps are never allowed to document when participants cannot be located.

IA/ID Training Services - Application

Question:

My participant has provided me with documentation that a medical issue is preventing them from resuming their occupational skills training/welding program in the spring. They have made successful progress up until this point and the nature of the injury would make it impossible for them to attend the upcoming courses. How do I document that in the MIS so the participant isn't flagged for exit?

Answer:

The Career Planner must record this in the MIS using the *Planned Gap/Holding* service. Documentation of the medical injury and their anticipated return date must be kept in the case file and outlined in case notes.



IA/ID Training 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				
WIOA TRAINING Services - (PIRL Data Element No. 1300, 1-12)				
Training Services: WIOA Title I Adult and Dislocated Workers DRAFT				
Training Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service Contributes to the Minimum Training Expenditure Requirement	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
Customized Training	<p>Training activity provided under a contract that is designed to provide training to adults and dislocated workers to meet the special requirements of an employer or group of employers. To be considered a countable training expenditure, the customized training:</p> <ul style="list-style-type: none"> a) May not be more than 50% of the total training cost; and b) Must be with an employer who: <ul style="list-style-type: none"> i. Agrees to hire WIOA participants upon completion of the customized training; and ii. Are training employed workers who: <ul style="list-style-type: none"> 1) Do not earn wages at a self-sufficiency level and to whom the employer commits to continue to employ; and 2) Are being trained in new technologies, new production or service procedures, who require additional skills or workplace literacy required for employment, or for other appropriate purposes identified by local boards. <p>Illinois ETPL requirements do not apply.</p>	<p>Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER</p> <p>Training Measures AMSG/DMSG</p>	Yes	Yes
Occupational Skills Training	<p>An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels. Such training must be specified in the participants individual Employment Plan (IEP) and be of sufficient duration to impart needed skills and lead to a recognized postsecondary credential. Such programs should be outcome orientated and focused on an occupational goal specified in the IEP.</p> <p>Training program must be on the Illinois ETPL.</p>	<p>Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER</p> <p>Training Measures ACAR/DCAR AMSG/DMSG</p>	Yes	Yes
Prerequisite Training	<p>A prerequisite course is defined as a course that is required or necessary as a prior condition to enter into a program of study. Postsecondary or advanced level course or another requirement that a student must have taken prior to enrolling in a specific course or program. Preparatory courses that may provide a participant with the knowledge or skills to enroll in another training such as entry, intermediate or advanced level postsecondary or occupational skills training. Training program must be on the Illinois ETPL. Required for application or CORE component of the program.</p> <p>Training program must be on the Illinois ETPL.</p>	<p>Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER</p> <p>Training Measures ACAR/DCAR AMSG/DMSG</p>	Yes	Yes
Registered Apprenticeship Program (RAP)	<p>An apprenticeship program registered with the U.S. Department of Labor meeting the standards defined by USDOL under 29 CFR Part 29, Subpart A. It is an employer-driven model that combines on-the-job training with job-related instruction in curricula tied to the attainment of industry-</p>	<p>Employment Measures AEER2/DEER2</p>		

IA/ID Training Services - Rules

RULES for Documenting in MIS

- End Date AND Completion Statuses
- Select one of the following:
 - **Successful** = Record when the participant completes the service or training.
 - This is not an indication of a credential/certification/license being attained.
 - **Unsuccessful** = Record when the participant withdrew or did not complete the service or training program. (Withdrew)
 - This would include if the participant was expelled by the training institution.

PLEASE
NOTE

Note
Training records should NOT be ended with a status and end date unless “successful or “unsuccessful” has occurred.

IA/ID Training Services - Rules

RULES for Documenting in MIS

- Career Planners must **fully inform** participants about the ETPL and how it can help maximize training provider selection. This includes career planners examining available information on providers and programs such as performance information.
- Career Planners should discuss and inform participants about the contents of the ETPL in accordance with local area policies and procedures and document the use of the ETPL appropriately. The in-depth interaction must be documented under a *Career Planning (Case Management)* episode.

PLEASE
NOTE

Note

This has been a repeat finding across multiple local areas during federal monitoring.

IA/ID Training Services - Application

Question

- Should there be one training service line open for a training program and it remains open until the training is completed?

Answer

- YES. Case notes should indicate any planned breaks such as summer/semesters, holidays, etc. for the training program. If there is a planned gap in services due to a medical issue, etc., the career planner would enter that activity to indicate a non-training program planned break during the training program. The training record should remain “open” during this period.

PLEASE
NOTE



Note

Training records should NOT be ended with a status and end date unless “successful” or “unsuccessful” has occurred.

Supportive Services - Definition

PIRL Data Element Name	Service/Activity Label (IWDS)	Definition	Same-Day Service?
Most Recent Date Received Supportive Services	SS - Child/Dependent Care	Services provided to a participant to permit his/her participation in a WIOA-funded career service or training program or their retention of a job gained through WIOA participation by ensuring that children or other dependents of the participant are properly cared for during the period of time a participant is in training or at work. Assistance may include child/adult day care or after school programs which are in-home or outside the home. Childcare usually includes supervision and shelter and may include meals and transportation.	Yes
	SS - Transportation	Services provided to a participant to permit his/her participation in a WIOA-funded career service or training program or retention of a job gained through WIOA participation by ensuring that he or she has the ability to make the trip from his or her residence to the training or employment site (and childcare site, if necessary) and back. Assistance may include the cost of public transportation or mileage reimbursement if the participant is using his or her vehicle for transportation purposes.	Yes
	SS - Healthcare	Services provided to a participant to permit his/her participation in a WIOA-funded career service or training program or retain employment that was gained through WIOA participation by ensuring that needed health services are made available. Health care services may include, but are not limited to: a) Physical examination required for participation in training or as a condition of employment; b) Provision of eyeglasses; c) Essential dental services; d) Reasonable accommodations for individuals with disabilities; and e) Other essential health care that is required by the program.	Yes
	SS - Other Supportive Services	Other supportive services that are made available to participants to enable their participation in a WIOA-funded career service or training program or to assist them in obtaining and/or retaining a job gained through WIOA participation. These may include, but are not limited to: a) Assistance with educational testing; b) Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes; c) Payments and fees for employment and training-related applications, tests, and certifications; d) Payments and fees for employment and training-related applications, tests, and certifications; e) Meals (for youth only); and	Yes

Supportive Services (IA/ID):
Services necessary to enable an individual to successfully participate in WIOA career and training services.

- Must be in support of a WIOA Title I career or training service.
- Must be documented in IEPs and recorded in MIS.
- IA/ID are not eligible for supportive services during Follow-Up.
- Non-Enrolled Activity: Does not trigger enrollment or reset 90-Day Exit clock.

Supportive Services - Rules

RULES for Documenting in MIS

- Local Workforce Innovation Boards (LWIBs) must develop a supportive services policy that ensures resource and service coordination in the local area.
- All local staff, especially career planners, must have copies of local policies and understand how to apply the local board's policies.

PLEASE
NOTE



Note

This has been a repeat finding across multiple local areas during federal monitoring.

Supportive Services - Rules

RULES for Documenting in MIS

- All Supportive Services are “Non-Enrollment” Services
- MIS will not allow any Supportive Service record unless there has been another enrollment service provided within 90 days.
 - An enrollment service being provided on the same day as a supportive service should be documented *first* then the supportive service record can be added.
 - The Matrix provides an array of services that would accurately justify the provision of a supportive service.
 - Career Planning should not be the only activity/episode added to justify the supportive service record.

Supportive Services

What are the available Supportive Services for IA/ID?

- SS - Child/Dependent Care
- SS - Transportation
- SS - Healthcare
- SS - Other Supportive Services
- SS - Housing Assistance
- SS - Legal Aid **NEW**
- SS - Tools/Equipment
- SS - Uniforms
- *SS - Needs-Related Payments

PLEASE
NOTE



Note

*Only allowable for IA/ID who are unemployed AND enrolled in WIOA-funded training.

Supportive Services - Demo

WIOA Services - PIRL OMB Control Number 1205-0521			
WIOA Supportive Services - (PIRL Data Element Nos. 1409 and 1500)			
WIOA Title I Supportive Services DRAFT			
Supportive Services: Supportive Services that are necessary to enable an individual to successfully participate in WIOA activities for Youth or career and training activities authorized under WIOA for Adults and Dislocated Workers.			
Local Workforce Innovation Boards (LWIBs) must develop a supportive services policy that ensures resource and service coordination in the local area. The policy should address procedures for referral to such services, including how such services will be funded when they are not otherwise available from partners or other sources.			
PIRL Data Element Name	Service/Activity Label (IWDS)	Definition	Same-Day Service?
Most Recent Date Received Supportive Services	<u>SS - Child/Dependent Care</u>	Services provided to a participant to permit his/her participation in a WIOA-funded career service or training program or their retention of a job gained through WIOA participation by ensuring that children or other dependents of the participant are properly cared for during the period of time a participant is in training or at work. Assistance may include child/adult day care or after school programs which are in-home or outside the home. Childcare usually includes supervision and shelter and may include meals and transportation.	Yes
	<u>SS - Transportation</u>	Services provided to a participant to permit his/her participation in a WIOA-funded career service or training program or retention of a job gained through WIOA participation by ensuring that he or she has the ability to make the trip from his or her residence to the training or employment site (and childcare site, if necessary) and back. Assistance may include the cost of public transportation or mileage reimbursement if the participant is using his or her vehicle for transportation purposes.	Yes
	<u>SS - Healthcare</u>	Services provided to a participant to permit his/her participation in a WIOA-funded career service or training program or retain employment that was gained through WIOA participation by ensuring that needed health services are made available. Health care services may include, but are not limited to: a) Physical examination required for participation in training or as a condition of employment; b) Provision of eyeglasses; c) Essential dental services; d) Reasonable accommodations for individuals with disabilities; and e) Other essential health care that is required by the program.	Yes
	<u>SS - Other Supportive Services</u>	Other supportive services that are made available to participants to enable their participation in a WIOA-funded career service or training program or to assist them in obtaining and/or retaining a job gained through WIOA participation. These may include, but are not limited to: a) Assistance with educational testing; b) Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes; d) Payments and fees for employment and training-related applications, tests, and certifications; e) Meals (for youth only); and f) Other reasonable expenses to permit a participant to participate in the WIOA program or keep their employment.	Yes

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

Follow-Up Services - Definition

Follow-Up Services:

Must be provided, as appropriate to WIOA Adult and Dislocated Worker participants who are placed in unsubsidized employment for up to twelve (12) months following the date of employment.

- Must be documented in IEPs and recorded in MIS.
 - Are provided to help individuals retain employment, earn wage gains, or advance within their occupation.
 - LWIBs must have their own local policy on allowable IA/ID Follow-Up.

PLEASE NOTE

Note

These services are designed to help individuals retain employment, earn wage gains, or advance within their occupation.

PIRL Data Element Name	Service/Activity Label (IWDS)	Definition	Same-Day Service?
Most Recent Date Received Follow-up Service	Follow-Up Services	<p>Adult and DW -</p> <p>Follow-up services must be provided, as appropriate, for participants in adult or dislocated worker workforce activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment per the Follow-Up Services policy. Follow-up services must meet the needs of the participant and may include, but is not limited to the following:</p> <ol style="list-style-type: none"> Counseling individuals about the workplace; Contacting individuals or employers to verify employment; Contacting individuals or employers to help secure better paying jobs, additional career planning, and counseling for the individual; Assisting individuals and employers in resolving work-related problems; Connecting individuals to peer support groups; Providing individuals with information about additional educational or employment opportunities; and Providing individuals with referrals to other community resources. <p>When an Adult or Dislocated Worker participant obtains unsubsidized employment while still receiving traditional WIOA services, there cannot be a Follow-Up Service activity opened in IWDS. In this instance, documenting the follow-up should be included and recorded during routine, two-way communication between the Career Planner and the participant. Only when the individual completes services can a Career Planner open a Follow-Up Service and enter a case note of the action in IWDS.</p>	No

Follow-Up Services - Rules

RULES for Documenting in MIS

- When WIOA Adults or Dislocated Workers enter unsubsidized employment *during participation in WIOA*, **follow-up is required**; however, MIS (IWDS) will not allow a follow-up service record to open prior to exit.
 - During participation, follow-up should be documented in a standard/general case note during routine, two-way communication between the Career Planner and the customer.
 - At time of exit, a Career Planner must enter a Follow-Up Service and a case note to reflect the action in IWDS.
 - Follow-Up is not a Same-Day service record.
 - Follow-Up service records stay open until a completion date and status is documented.

PLEASE
NOTE

Note

If, after ninety (90) days following exit, a participant is not responsive, cannot be located, or refuses to provide information, the career planner may close follow-up services. The case notes and the IEP must document the reason for discontinuation.

Follow-Up Services - Rules

RULES for Documenting in MIS – continued

- When an Adult or Dislocated Worker **does not obtain unsubsidized employment** upon completion of traditional WIOA services, follow-up services **should be made available throughout the 12-month follow-up period.**
 - If these individuals decline follow-up services, it must be documented in the case notes and/or Individual Employment Plan (IEP).
 - Follow-Up is left open until completed in MIS.



PLEASE
NOTE

Note

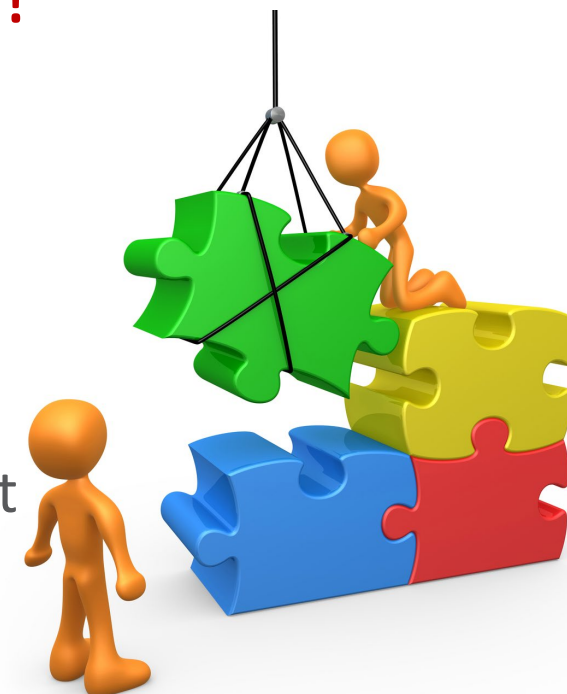
Participants in this category may opt out of receiving Follow-Up Services after being offered the information and opportunity to receive them. This decision must be documented in MIS in case notes and/or the IEP.

Follow-Up Services

What are the available Follow-Up Services for IA/ID?

- Counseling about the workplace;
- Contacting to verify employment;
- Contacting to help secure better paying jobs, additional career planning, and counseling;
- Assisting in resolving work-related problems;
- Connecting individuals to peer support groups;
- Providing information about additional educational or employment opportunities; and
- Providing referrals to other community resources.

PLEASE
NOTE



Note

Follow-Up Services cannot be provided while the participant is still receiving career, training, or supportive services. Certain Follow-Up Services can include the employer along with the participant.

Follow-Up Services - Demo

WIOA Services - PIRL OMB Control Number 1205-0521				
WIOA Follow-Up Services - (PIRL Data Element Nos. 1412 and 1503)				
Follow-Up Services: WIOA Title I Adult, Dislocated Workers and Youth DRAFT				
PIRL Data Element Name	Service/Activity Label (IWDS)	Definition	Same-Day Service?	
Most Recent Date Received Follow-up Service	<u>Follow-Up Services</u>	Adult and DW - Follow-up services must be provided, as appropriate, for participants in adult or dislocated worker workforce activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment per the Follow-Up Services policy. Follow-up services must meet the needs of the participant and may include, but is not limited to the following: a) Counseling individuals about the workplace; b) Contacting individuals or employers to verify employment; c) Contacting individuals or employers to help secure better paying jobs, additional career planning, and counseling for the individual; d) Assisting individuals and employers in resolving work-related problems; e) Connecting individuals to peer support groups; f) Providing individuals with information about additional educational or employment opportunities; and g) Providing individuals with referrals to other community resources.	No	

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

Program Exit Reminders

Reminders regarding program exits

- If a participant is employed and is not in need of any further services, please prepare for exit.
- Remember, if no services have been provided to the participant in 90 days, there is no gap in services, and there is no plan for future services, they must be exited.
- Customer should be offered Follow-Up services and it should be case noted if the customer accepted or not.
- Reports are available in the Illinois Performance Accountability and Transparency System (IPATS) to determine when participants have not received an enrolled service and should be reviewed for exit following the “90 Day NO Service” rule and must be exited.

Program Exit Reminders

Reminders regarding program exits – continued

- Prior to entering an exit record, the following information must be reviewed for accuracy, and any deficiencies identified must be corrected:
 - Every service provided to the participant has been recorded and close any open services by adding the end date and completion status;
 - All supporting documentation has been obtained and is physically located in the file and/or case notes are entered;
 - Each credential (Diploma/Degree/Certification) achieved has been added to the credential record and appropriate credentials selected in the exit record;
 - All types of Measurable Skill Gains (MSGs) achieved are recorded;
 - The exit record includes one School Status at Exit and one Exit Reason; and
 - If the exit reason is an exclusion from the performance indicators as outlined in the Exclusions from Performance section of this policy, supporting documentation/validation is included in the file.
 - Note a separate exit reason is required for each co-enrolled program.

NDWG - Disaster Recovery Grants

National Dislocated Worker Grants (DWGs)

- Disaster Recovery DWGs
 - Used to minimize the employment and economic impact of declared disasters and emergency situations in federally disaster-declared areas
 - Participants can receive
 - Disaster-relief employment only;
 - Employment and training activities only; or
 - Both disaster-relief employment and employment and training activities.
 - Disaster Relief Employment (DRE) Component
 - Temporary disaster-relief and humanitarian assistance employment (listed on this tab)
 - Employment and Training Services Component
 - Services consistent with WIOA Dislocated Worker services (see IA/ID Career and Training Services tabs)

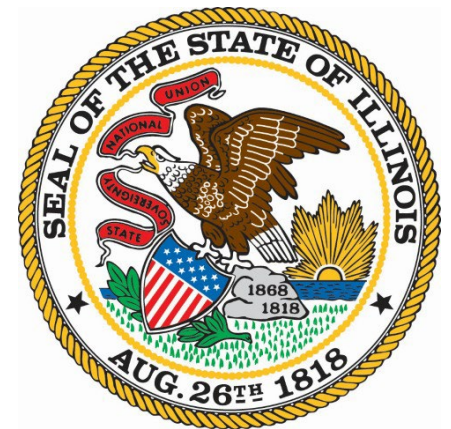
NDWG - Disaster Recovery Grants

National Dislocated Worker Grants (DWGs) – continued

- Employment Recovery DWGs
 - For workers affected by major economic dislocations, such as plant closures and mass layoffs
 - Employment and Training services consistent with WIOA Dislocated Worker services

Other Non-WIOA Grants: JTED, PROWD

- Each grant will have a set of services specific to that grant outlined in Notice of Funding Opportunities (NOFO) and Grant Agreements



NDWG - Disaster Recovery Grants - DEMO

WIOA Services - PIRL OMB Control Number 1205-0521				
WIOA Disaster Recovery - (PIRL Data Element No. 1409 and 2004)				
WIOA Title I Disaster Relief Employment (DRE) Component of National Dislocated Worker Grant Services DRAFT				
Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service Contributes to the Minimum Training Expenditure Requirement	Same-Day Service?
SS - Child/Dependent Care for DRE	Services provided to a DRE participant to permit his/her participation in Disaster Relief Employment (DRE) by ensuring that children or other dependents of the participant are properly cared for during the period of time a participant is in a DRE activity. Assistance may include child/adult day care or after school programs which are in-home or outside the home. Child care usually includes supervision and shelter and may include meals and transportation.	N/A	No	Yes
SS - Emergency Assistance for DRE	A one-time or rare expense to allow a Disaster Relief Employment participant to participate in DRE activities by removing or reducing barriers to participation. Examples of emergency assistance include payment of utility bills, car insurance payment, rent payment, and vehicle repairs.	N/A	No	Yes
SS - Housing Assistance for DRE	Supportive services which assist DRE participants in maintaining or obtaining adequate shelter for themselves and their families while in Disaster Relief Employment by removing or reducing barriers to participation.	N/A	No	Yes
SS - Medical Tests/Care for DRE	Services provided to a DRE participant to permit him/her to participate in Disaster Relief Employment (DRE) by ensuring that needed health care services are made available. Health care services may include, but are not limited to: a) Medical care and diagnostics; b) Provision of vision services, including eyeglasses; c) Essential dental services; d) Reasonable accommodations for individuals with disabilities; e) Drug, alcohol abuse counseling; and f) Other health care or mental health services.	N/A	No	Yes
SS - Other Supportive Service for DRE	Other supportive services not listed elsewhere that are made available to DRE participants to enable their participation in Disaster Relief Employment by removing or reducing barriers to participation.	N/A	No	Yes



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)



thank you