



1. Purpose

This document describes the steps and considerations necessary for enrollment into the WIOA Title I Adult and Dislocated Worker programs for the purposes of providing Basic Services only. This process involves five steps - registration, assessment, program enrollment, case note, and documentation.

2. Procedure

a. Registration and Assessment

i. Verify Seeker Has Registered on WorkSourceWA.com & Check Current Enrollment Status

Registration requires that a job seeker have an account in WorkSourceWA.com. Much of the information that is collected for registration is entered by the job seeker after they have created their account. If a seeker does not have a WorkSourceWA.com account, one will need to be created so registration can be completed.

1. Locate seeker in ETO and view their dashboard;
2. Review the Most Recent (5) Program Enrollments section on the seeker's dashboard. If an active WIOA program is present, the seeker has already been registered and enrolled and service delivery can proceed.
3. If an active WIOA program is not present, use "Access Seeker/Participant Account" on the job seeker's dashboard to determine if they have a WorkSourceWA.com account and that they have completed their registration. If an error is received, the seeker will need to create or finish their WorkSourceWA.com account before proceeding. If an error is not received and the seeker's account appears, registration has been completed and the basic assessment can be conducted.

ii. Provide a Basic Assessment

Before finishing registration and deciding to enroll a job seeker, a basic assessment must be provided. This assessment will be used to determine if the seeker is appropriate for enrollment and what kind of services the individual is seeking. Prior to conducting the assessment, case notes must be examined to determine if an assessment has already been conducted in the past. If an assessment is found but the job seeker was not enrolled, then the details of the assessment should be reviewed to determine if the seeker is now appropriate and eligible for enrollment.

The basic assessment should determine at a minimum:

1. Service needs;
2. Employment goal;
3. A general understanding of the seeker's education and employment history (including dislocation event if applicable); and
4. Selective service status
 - a. If the job seeker indicates they are not registered for the Selective Service, are male, and are under the age of 26, you may register them for selective service with their permission.
 - b. If the job seeker is not registered and they are 26 years of age or older, refer to <https://www.sss.gov/Registration-Info/Who-Registration> for information on a possible exemption from registration.
 - c. If the job seeker is not registered and is not exempt they cannot be enrolled in WIOA Adult – Basic Services only.

Refer to the Basic Assessment Desk Aid for assistance with providing a basic assessment.

iii. Determination to enroll in WIOA Adult and Dislocated Worker for Basic Services

After the assessment is complete, it will be evident on whether or not to proceed with registration and enrollment into both WIOA Adult and Dislocated Worker or registration and enrollment into just WIOA Adult.

If a seeker is determined not to be appropriate for enrollment in the WIOA Adult program at a minimum, a case note must be entered documenting the reason the seeker was not appropriate for enrollment. To case note a decision not to enroll:

1. **Open a new Case Note touchpoint**

- a. Click on Take New Touchpoint at the bottom of the review touchpoint list.
- b. Select the Case Note touchpoint from the take new touchpoint list.

2. **Write Case Note**

- a. Type “Basic Enrollment - NE” in the Identifier field.
- b. In the Case Note field:
 - i. Enter a brief summary of the Basic Assessment and explain reasoning for not proceeding with enrollment.
 - ii. You can use the following text as a template:

John’s service needs and employment goal have been reviewed and it has been determined that enrollment in WIOA Adult – Basic Services only is not appropriate at this time.

John came into the WorkSource center today asking about what services and information we have to offer. John mentioned he left his job voluntarily and plans on traveling a bit before looking for work. John’s employment goal is Carpenter. John’s highest level of education is high school and he has recent experience in carpentry.

Let John know about some of our service offerings and offered to setup a follow-up appointment in a month or two, but he declined.

- 3. Ignore Upload Document, Subject Category, and Seeker Note ID.
- 4. Save the touchpoint.

iv. **Enter registration information into ETO**

Most information for registration is entered by the job seeker in WorkSourceWA.com. The remaining information gets entered into ETO under the touchpoint “WIOA Eligibility Application”. A staff person assisting the job seeker should walk through each of the required data elements in ETO with the job seeker in-person. The steps for creating the WIOA Eligibility Application are as follows:

1. **Open a new WIOA Eligibility Application touchpoint**

- a. Navigate to the job seeker’s dashboard.
- b. Click on Review Seeker/Participant Touchpoints at the top of the seeker’s dashboard.



- c. Click on Take New Touchpoint at the bottom of the review touchpoint list.
- d. Select the WIOA Eligibility Application touchpoint from the take new touchpoint list.

2. **Enter data for Basic Services Eligibility**

a. **Application Type tab**

- i. Choose Basic Services Eligibility.

b. **Basic Services Eligibility tab**

- i. Answer *Is the Applicant registered for the Selective Service?* and *Is the Applicant receiving SSI/SSDI?*. If Dislocation status has been established, select the appropriate category and provide a *Date of actual*



dislocation unless utilizing category 4 – Displaced Homemaker.

- ii. Ignore the Selective Service documentation upload field.

The screenshot shows a web form titled "Questions for Staff Input". It contains several sections:

- Is the Applicant registered for the Selective Service? *** (radio buttons for Yes, No - determined that failure to register was not knowing and willful per local policy, No (ineligible for WIOA), Not Applicable). A red box highlights this section with a yellow arrow pointing to it.
- Please upload Selective Service documentation** (text input field and Select button).
- Applicant's dislocated worker status, if applicable** (radio buttons for 1. General Dislocation, 2. Dislocation from Facility Closure / Substantial Layoff, 3. Self-employed Dislocation, 4. Displaced Homemaker, 5. Dislocated/Separating Military Service Members, 6. Spouses of Military Service Members). A red box highlights this section with a yellow arrow pointing to it.
- Date of actual dislocation** (text input field with mm/dd/yyyy format). A red box highlights this field with a yellow arrow pointing to it.
- Is the Applicant receiving SSI/SSDI?** (radio buttons for Yes, No). A red box highlights this section with a yellow arrow pointing to it.

c. Notes tab

- i. If Dislocation status is established, use this tab to explain the reasoning behind dislocation so that the job seeker can review and attest to its validity.

d. Complaint, Grievance, and Equal Opportunity tab

- i. The information on this tab must be read by the job seeker. It is suggested that this information be printed and provided to the job seeker. After the seeker has read the information, select "Yes" at the bottom of the touchpoint.

e. Data Collection Signatures

- i. After reviewing the Basic Services Eligibility information and the Complaint, Grievance, and Equal Opportunity information, have the job seeker sign the form electronically certifying that the information entered is accurate. The staff person reviewing this information with the seeker must also sign on this tab.
- ii. Save the touchpoint.

b. Program Enrollment

i. Open a new Program Enrollment touchpoint

- 1. Click on Take New Touchpoint at the bottom of the review touchpoint list.
- 2. Select the Program Enrollment touchpoint from the take new touchpoint list.

ii. Enter data for Program Enrollment

- 1. Choose "WIOA Adult" from the Program of Enrollment dropdown menu.
- 2. Ignore Local Program.

3. Select “WDA12 – WIOA Title I Basic Services Only” from the Contract dropdown menu. This is a type ahead field so you can enter “WDA12” and it will filter to this option automatically. A previous version of the contract may appear, labeled “WDA12 – WIOA Adult Basic Services Only”. Do not select this contract if it appears.

Enrollment | Demographics at Enrollment

Office Name
WorkSource Spokane

Legacy Office

Review the seeker's personal data on the Demographic

Program of Enrollment *
WIOA Adult

Local Program

Contract (if applicable)
WDA12 - WIOA Title I Basic Services Only

Status *
Enrolled

Enrollment Start Date *
mm/dd/yyyy

Enrollment End Date *
mm/dd/yyyy

Highest level of Education at Time of Enrollment: *
-- Select --

Highest level of education currently documented in job m
GED or High School Equivalent

Note: Remember to record an "Outcome, Program Completion"

Is Self-Employment among this Participant's Goals?
 Yes
 No
Clear Selection

Participant Signature
Signature: _____
Sign

Enrollment Comments

4. Choose “Enrolled” from the Status dropdown menu.
5. Enter an Enrollment Start Date. This date should match the date the job seeker signs the WIOA Eligibility Application.
6. Select the seeker’s highest grade completed based on their answer in job match, which is listed below the Highest level of Education at Time of Enrollment field.
7. Ignore Is Self-Employment among this Participant’s Goals?, Participant Signature, and Enrollment Comments.
8. Save the touchpoint.

- iii. **Repeat for Dislocated Worker enrollment** – if a dislocation event is established, then the seeker should also be enrolled in WIOA Dislocated Worker. After enrolling in WIOA Adult repeat steps i and ii, but select WIOA Dislocated Worker for the Program of Enrollment field.

c. Enter Service

- i. **Open a new Basic Service touchpoint** – to finalize enrollment, an initial service must be entered and attached to the WIOA Adult program. This initial service is the Basic Assessment conducted in Section 2.a. above.
 1. Click on Take New Touchpoint at the bottom of the review touchpoint list.
 2. Select the Basic Service touchpoint from the take new touchpoint list.

ii. **Enter data for service delivery**

1. Ignore Legacy Office.
2. Choose "WIOA Adult" from the Active Program Enrollments dropdown menu.
3. Ignore Migration Program ID, Other Program, and Contract.
4. Select "Basic Assessment 2.0" from the Service Provided dropdown menu.
5. Ignore the provider and course fields.
6. Enter an Activity Date. This date should match the Enrollment Start Date on the Program Enrollment touchpoint.
7. Ignore the Notes and Date of next contact fields.
8. Save the touchpoint.

- iii. **Repeat for Dislocated Worker enrollment** – if the seeker is also enrolled in WIOA Dislocated Worker, then a second service must be entered. After creating the first basic service, repeat steps i and ii, but select WIOA Dislocated Worker for the Active Program Enrollments field.

Basic Service

Select Active Program Enrollment, Other Program, or Local Cont

Office WorkSource Spokane

The "Active Program Enrollments" dropdown below populates with open Program Name - Start Date - Office - Staff Member

Active Program Enrollments

WIOA Adult__5/1/2017_WorkS

WIOA Out of School Youth__4/12/2017_Administrat...n_WIT8 . Staff

WIOA Adult__5/1/2017_WorkSource Spokane_WIT1 . Staff

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Items 1-2 out of 2

d. Case Note

i. **Open a new Case Note touchpoint**

A case note needs to be created to explain eligibility and enrollment into WIOA Title I Basic Services only and to describe the Basic Assessment provided.

1. Click on Take New Touchpoint at the bottom of the review touchpoint list.
2. Select the Case Note touchpoint from the take new touchpoint list.

ii. **Write Case Note**

1. Type "Basic Enrollment" in the Identifier field.
2. In the Case Note field:
 - a. Explain eligibility, indicate enrollment in WIOA Adult and Dislocated Worker for basic services only (as appropriate), and enter a brief summary of the Basic Assessment (including dislocation event, if applicable).
 - b. You can use the following text as a template:

Identifier: Basic Enrollment

Case Note

Case Note

Verified John's date of birth of 1/1/1990 using his Driver's License, #DOEJT201BG.

John is eligible for WIOA Adult Basic Services based on the following: he is 18 or older, he is legally authorized to work in the United States, and he is registered for the Selective Service.

569/8000

Uploaded Document

Select

Subject Category

Seeker Note ID

John is eligible for WIOA Adult and Dislocated Worker Basic Services based on the following: he is 18 or older, he is legally authorized to work in the United States, he is registered for the Selective Service, and he was dislocated from previous employment due to general dislocation.

John's employment goal is Carpenter. John's highest level of education is high school and he has recent experience in carpentry. John is seeking assistance with his resume, interviewing skills, and job search techniques.

John has been enrolled in WIOA Adult and Dislocated Worker for basic services only as of 5/1/2017.

3. Ignore Upload Document, Subject Category, and Seeker Note ID.
4. Save the touchpoint.

3. Other Considerations

- a. Continuation of Service** – once enrolled additional Basic Services may be provided as needed. However, at least one service must be provided within 90 days to keep the seeker enrolled. Each service given extends the timeframe in which another service must be provided by an additional 90 days. If another service is not provided within 90 days of enrollment or the last service provided, then program enrollment(s) will end. If enrollment in all WIOA Title I programs end, then the enrollment process will need to be repeated to provide additional services. A program that has ended is indicated by an Enrollment End Date on the Program Enrollment Touchpoint. This date is automatically generated based on the last date of service.

- b. Need for Individualized, Training, or Supportive Services** – if it is determined that a seeker is need of additional services beyond the basic level, then enrollment in WIOA Adult or Dislocated Worker for individualized and training services is required. Refer to SAWDC Policy W401 R2 – Eligibility and Documentation Requirements for more information regarding requirements for enrollment in WIOA Adult or Dislocated Worker for individualized and training services.