

Dislocated Worker and WIOA Adult Workforce One Exit Procedure

UPDATE on “Pending Exit” type Activities

Cases with “Employed, Pending Exit” and “Pending Exit, Other” activities will now automatically exit the Dislocated Worker program they are enrolled in 90 days following the start date of these activities if a pending exit is also entered on the program sequence. Nothing further needs to be done on these cases unless the participant returns for additional services (not follow-up services) within the 90-day window.

New data entry procedure for the “Employed, Pending Exit” and “Pending Exit, Other” activities

After your participant alerts you, they are no longer in need of services, enter your last case note detailing client status at new job, job details and that you informed them of their exit. If they are not working, enter the details of the conversation and why they are requesting to be exited.

1. If your participant is exiting the program due to employment:

- a. Open the “Employed, Pending Exit” activity using the date of this last conversation/e-mail/text/message as the activity’s start date. You can backdate if collecting all employment information details takes longer.
- b. Double check all the areas of the Workforce One record to see if there are any errors that need to be corrected.
- c. Close all open activities on the case record with the date your participant informed you they were no longer in need of services. This is the same date you used to open the “Employed, Pending Exit” activity.
 - i. Do not close the pending exit activity
 - ii. Do not enter an outcome on the pending exit activity (completion status)
- d. Make sure to enter any pending credentials and MSG on the case.
- e. Go into the participant’s “Exit Summary” screen and select the program sequence you are case managing
 - i. Enter all exit details on the case and click “Save Exit as Pending”
- f. Nothing further needs to be done on the case (unless your client returns and wants to get back in the program withing those 90 days for continued/additional service)
- g. Shortly after 90 days has expired following the start date of the “Employed, Pending Exit” activity the case will be automatically exited from the program

IMPORTANT REMINDERS:

- If the participant is exiting to employment, inform them of their eligibility for 12 months of follow-up services and case note that discussion.
- If any new activities are opened, this case will not automatically exit

- If any other activities have an end date after the start of this activity, the case will not automatically exit
- If you fail to complete all of the fields on the pending exit the case will not automatically exit
- At any time you can circumvent this process by closing the activity and performing a SAVE FINAL EXIT

2. If your participant is exiting to anything other than employment (Retirement, medical, family care, etc.)

- a. Open the “Pending Exit, Other” activity using the date of this conversation as the activity’s start date
- b. Double check all the areas of the Workforce One record to see if there are any errors that need to be corrected.
- c. Close all open activities on the case record with the date your participant informed you they were no longer in need of services. This is the same date you used to open the “Pending Exit, Other” activity.
- d. Make sure you to enter any pending credentials and MSG.
- e. Go into the participant’s “Exit Summary” screen and select the program sequence you are case managing
 - i. Enter all exit details on the case and click “Save Exit as Pending”
- f. Nothing further needs to be done on the case (unless your client calls back and wants to get back in the program withing those 90 days)
- g. Shortly after 90 days has expired following the start date of the “Pending Exit, Other” activity the case will be automatically exited from the program

REMINDERS:

- If any new activities are opened, this case will not automatically exit
- If any other activities have an end date after the start of this activity, the case will not automatically exit
- If you fail to complete all of the fields on the pending exit the case will not automatically exit
- At any time you can circumvent this process by closing the activity and performing a SAVE FINAL EXIT

3. If your client is out of compliance. (When your client has not responded in over 90 days)

- a. Enter a last case note reflecting the many contact attempts that you have tried over the 90 days since the last contact.
- b. Double check all the areas of the Workforce One record to see if there are any errors that need to be corrected.
- c. Close any training activities that may still be opened (Classroom training, non-credentialed training, etc.)

- d. Make sure you to enter any pending credentials and MSG.
 - e. Send the file to our compliance specialist and the file will be exited using the date of your last case note.
4. **If the participant returns for additional services (not follow-up services) during the 90-day window**
- a. You will need to open an activity that best represents the additional service provided to the participant
 - i. The start date of this activity will be the date they returned to you with the request for additional services
 - ii. The end date will be the last day the additional service is provided to the participant
 - b. You will then need to consider how long the additional service will continue
 - iii. If the additional service will continue for more than one day, delete the pending exit type activity from the program sequence.
 - 1. When the participant is finished receiving the additional service, follow the steps within the previous section of this article titled “New data entry procedure for the “Employed, Pending Exit” and “Pending Exit, Other” activities”
 - iv. If the additional service will only continue for one day
 - 1. Close the additional service activity with the same date as you entered for the start date
 - 2. Edit the start date for the pending exit type activity by entering the same date as you used for the additional service activity’s end date
 - v. Nothing further needs to be done on the case (unless your local policy requires you to perform additional tasks, or the participant returns during the 90-day window for additional services)
 - vi. Shortly after 90 days has expired following the start date of the pending exit type activity the case will be automatically exited from the program

Positive Exit Reasons ~ Wage Detail will be confirmed

Called back

Entered Armed Forces *(needs supplemental wage information added to the WF1 "Follow-Up" screen for 4 quarters following the exit. If not entered, this will be a negative exit)*

Entered Registered Apprenticeship Training

Entered Unsubsidized Employment

Remained Employed

Started Business/Self-employed *(needs supplemental wage information added to the WF1 "Follow-Up" screen for 4 quarters following the exit. If not entered, this will be a negative exit)*

Negative Exit Reasons ~ Wage Detail will be confirmed

Cannot Locate

Family Care Problems

Found Ineligible

Moved from Area

Refused to Continue

Retirement

Program/Type Transfer

Neutral Exits Reasons ~ Performance measures are neutralized

Death

Medical Treatment

Institutionalized

Reservist Called to Active Duty

THE ONLY TIME YOU SHOULD BE ENTERING INFORMATION IN THE EXIT SCREEN IS WHEN THE PARTICIPANT WILL NO LONGER BE RECEIVING SERVICES (DW and Adult only).

SINCE FUNDING SOURCES ARE ONLY SELECTED WITHIN ACTIVITIES, THE ONLY AREA THAT NEEDS TO BE CHANGED IN WF1 WHEN NEW FUNDING BEGINS ARE THE ACTIVITIES. (DW and Adult only)