



**Department of
Job & Family
Services**

WIOA Adult and Dislocated Worker

Career Services

Hello!

Introductions

Shelia Cunningham & Elizabeth King; WIOA Employment Services Coordinators

Housekeeping

Agenda

- Workforce Delivery System & YOU
- WIOA Career Services
- WIOA Service Behavior in ARIES
- (4) Demos
- Notifications
- WIOA (Career) Service Matrix
- Q&A



Workforce Delivery in the OMJ Centers

Thank you!!!!

Your efforts support job seeker employment security and advancement.

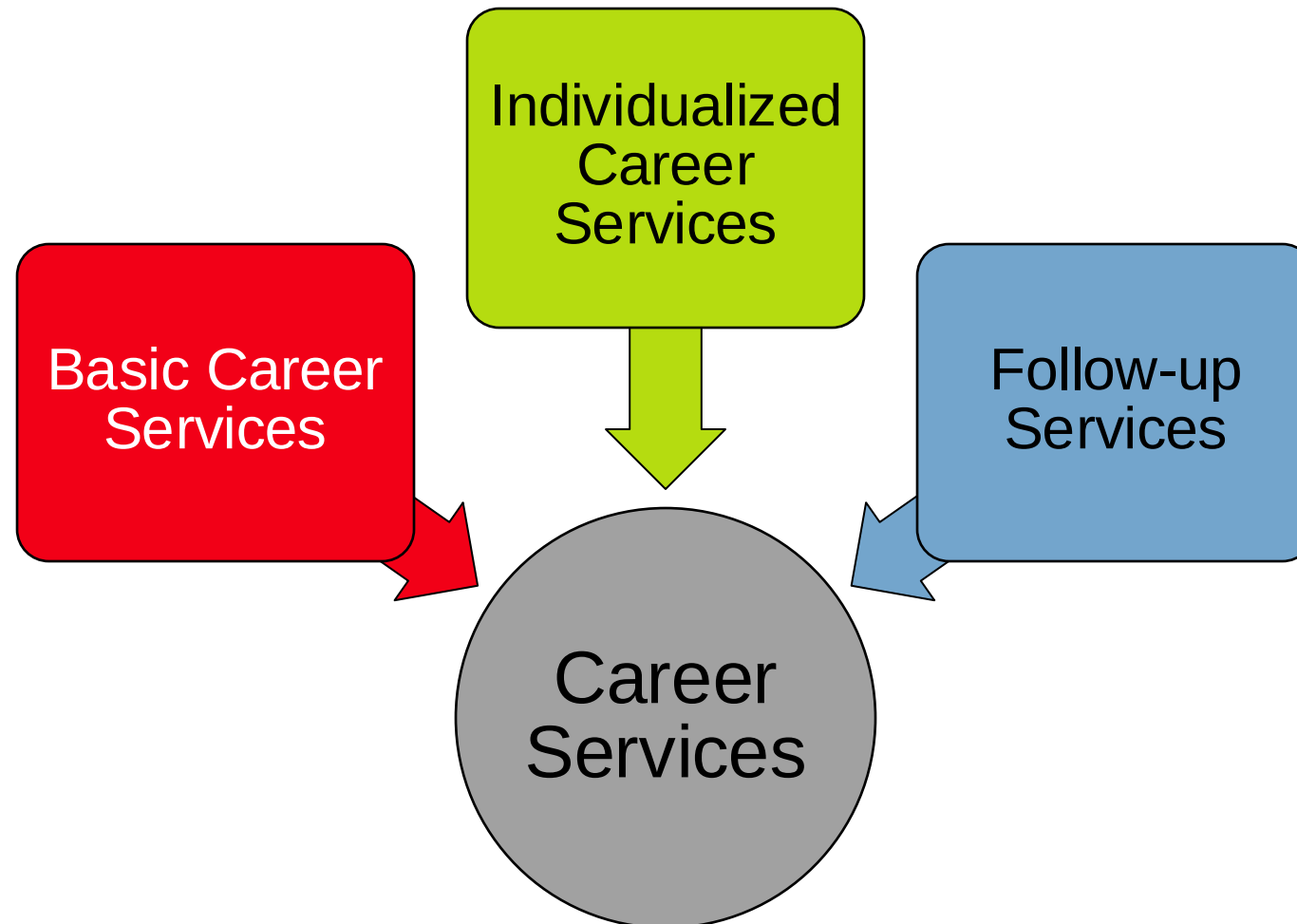
WIOA Services

Basic Career Services	Individualized Career Services	Training Services	Supportive Services	Follow Up Services
(Non Triggering) • Outreach/Orientation • WIOA Eligibility Determination • Self Serve Job Search (Triggering) • Career Counseling • Initial Assessment • Staff Assisted Job Search	• Comprehensive Assessments • Development of an Individual Employment Plan (IEP/IOP) • Financial Literacy services (Triggering)	• Occupational Skills Training • On the Job (OJTs) • Incumbent Worker (IWTs) • Adult Education and Literacy (Triggering)	• Assistance with Transportation • Assistance with Child Care • Assistance with Housing • Needs Related Payments • Assistance with Work Attire • Books, Fees, School Supplies (Triggering)	• Explaining Employer benefits or health insurance • Budgeting • Financial literacy Post Exit (Non Triggering)



WIOA Career Services Policy

[WIOAPL15-08.1 Career Services for Adults and Dislocated Workers](#)





WIOAPL 15-08.1 (Career Services for Adults and Dislocated Workers)

3 Categories of Career Services:

- Basic Career Services-2 Types:

Type 1: **Non-Triggering**: Minimal staff assistance and No WIOA Enrollment

Type 2: **Triggering**: Intensive staff assistance and WIOA Enrollment.

- Individualized Career Services-Provided as appropriate to obtain or retain employment

Short-term prevocational services; determination that receipt of services are required to retain or obtain employment; involve significant staff assistance; customized to individual's needs; triggers program participation; when services are provided, WIOA performance begins.

- Follow Up Services-Assists in securing and strengthening employment

Made available to a participant placed in unsubsidized employment for a minimum of 12 months following first date of employment; assist in maintaining employment; Can be provided while still enrolled in WIOA to ensure solid employment but typically is provided post exit.

Supportive Services

Designed to provide a participant with the resources necessary to enable their participation in career and training services; unable to obtain supportive services through other programs.



Basic Career
Services

Category 1/Type 1 of Career Services

Basic Career Services **Not-Triggering** Participation in WIOA

Category 1/Type 1 of Career Services:

[WIOAPL 15-08.1 Career Services](#)

Basic Career Services **NOT Triggering** Participation in WIOA

- Non-triggering= **Does not** begin or extend enrollment
- Minimal staff assistance is needed
- Sets the Individual up to receive additional assistance or services
- Satisfy Federal requirement to report our Universal customer activities
[WIOAPL15-21.1 Reporting Requirements for OMJ Center Universal Customers](#)
- In ARIES, these are called **Reportable Individual Services**



WIOAPL 15-21.1 OMJ Center Services for Universal Customers

Those customers served is a direct reflection of the value of your OMJ Workforce System

Reportable Individual definition:

- Customers who:
 - provide identifying information
 - only use self serve resources
 - only receive information-only services or activities

OhioMeansJobs Centers



Reporting this information to the Department of Labor is a quarterly requirement.

Methods: OMJ Center Kiosk; OhioMeansJobs.com; Staff providing Reportable Individual services in ARIES

[WIOAPL-15-21-1](#)

Basic Career Services **NOT Triggering** Participation in WIOA

Type 1

(ARIES → Reportable Individual Services)

Examples:

- Determination of whether the individual is ELIGIBLE to receive WIOA Adult and Dislocated Worker services
- Outreach, Intake and Orientation
- Self-Directed or self-service Job Search assistance
- Provision of Labor Market Information such as In demand occupations, Training provider costs
- Referrals to and coordination of activities with other programs and services
- Availability of Supportive Services and referrals to those services such as Child Care, Child Support, Transportation available in the local area, Medical or child health assistance; SNAP; TANF
- Group workshops-Resume writing; interviewing; job search; financial management.

Non-Triggering...Does NOT Enroll into WIOA Programs

12.

ARIES

Customer

Search

CHANGE OFFICE

2

38

Home / Customers / Treena Test- / Dashboard / Services

Treena Test- (ID: 343515832)

Name : Treena Test-

User Name : ag_ttest

Email : ttest@example.com

View Profile

Customer Services

Cases

UI Claimant

Case Notes

Customer Eligibility and Enrollment

Plans

Customer Financial Management

Customer Test Scores

Customer Event Registrations

Resumes

Document

Customer Services

Record new customer service

Start Date*

10/30/2024

End Date*

11/29/2024

Entry date	Actual date ↓	Office	Last modified by	Service name	Program / Grant	Status	Actions
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Clear all
No customer services found							

Items per page:

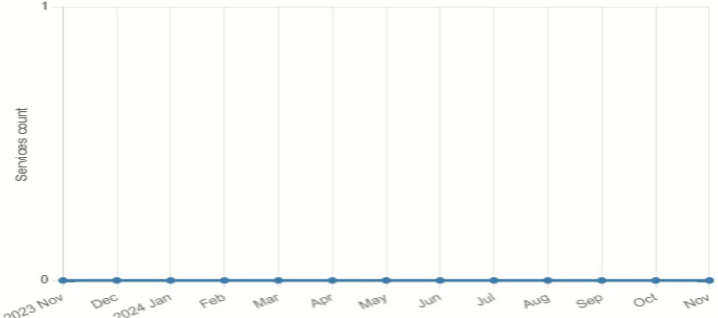
10

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Service Counts For The Last Year



What do Reportable Individual Services Look Like in ARIES?

1.

2.

Customer Services
Cases
UI Claimant

Reportable Individual Services

Service Date*
11/26/2024

Date in mm/dd/yyyy format.

3.

+ Add Program(s)

Add Program(s)

Program name	Enrollment status	Actions
Filter	Filter	Clear all
Reportable Individual	Eligible	☒
Items per page: 10	1 - 1 of 1	
Cancel	Add selected Program(s)	

4.

Services

+ Add Service(s)

Accessed Workforce Information	466	Basic Career Service - Staff Assisted	Does not begin or extend enrollment	☐
Assistance with the Federal Bonding Program	476	Basic Career Service - Staff Assisted	Does not begin or extend enrollment	☐
Eligibility Determination	519	Basic Career Service - Staff Assisted	Does not begin or extend enrollment	☐
Initial Assessment	536	Basic Career Service - Staff Assisted	Does not begin or extend enrollment	☐
Intake	537	Basic Career Service - Staff Assisted	Does not begin or extend enrollment	☐

WIOA has (15) specific Reportable Individual Services; Identified in **green** on the Matrix

5.

Add selected Service(s)

Submit Customer Service



Basic Career
Services

Category 1/Type 2 of Career Services:

Basic Career Services **Triggering Participation in WIOA**

Category 1/Type 2 of Career Services:

Basic Career Services **Triggering** Participation in WIOA

[WIOAPL 15-08.1 Career Services](#)

[WIOAPL-15-02-1 ADW Eligibility](#)

- Triggers Participation= **Does** begin or extend enrollment
- Significant staff assistance is needed
- Provides additional, in-depth assistance or services
- Satisfy Federal requirement to report on WIOA participation and receipt of services
- WIOA Performance Begins: starting/enrolling the participant automatically places them in the employment 2nd and 4th quarter after exit and median earnings measures once they exit.
- In ARIES, these are called **Customer Services**



Basic Career Services **Triggering** Participation in WIOA

Type 2

Examples:

- Initial Assessment of skill levels; Includes: Literacy; Numeracy; English language proficiency; Aptitude and Abilities; Skill Gaps
- Supportive service needs assessments
- Staff-assisted job search assistance
- Placement assistance (job matching; job referrals, job development)
- Career counseling; Career Guidance; Provision of in-demand occupations, career profiles and interest inventories.
- Meaningful Assistance with unemployment compensation. (WIOAPL 16-09)
- Financial Aid eligibility

Triggering...DOES Enroll into WIOA Programs



Category 2: Type of Career Service

Individualized Career Services **Triggering Participation in WIOA**

Category 2:

[WIOAPL 15-08.1 Career Services](#)

Individualized Career Services triggering participation in ARIES

- Staff intensive
- Tailored to the Individual
- Triggers enrollment in WIOA
- WIOA Performance Begins: starting/enrolling the participant automatically places them in the 2nd and 4th quarter after exit and median earnings measures once they exit.
- Requires the development of an Individual Opportunity Plan (IOP/IEP)
- In ARIES, these are called **Customer Services**

[WIOAPL-15-02-1 ADW Eligibility](#)



Individualized Services triggering participation in WIOA

Examples:

- Comprehensive/Specialized Assessments to gauge skill levels and service needs
- Development of an individual employment plan (IEP) to include goals and services
- Group counseling
- Individual counseling
- Career planning
- Prevocational services (learning skills; communication; interviewing, punctuality, personal maintenance; professional conduct.)
- Internships and work experiences (transitional jobs)
- Workforce Preparation activities
- Financial Literacy services
- Out of area job search assistance and relocation assistance
- English language acquisition and integrated education and training programs

Key Points for Individualized Career Services

- Providing an Individualized Career Service is providing intensive assistance.
- When providing any of the Individualized Career Services, enrollment into WIOA A/DW is required.
- Since the “Development of an Individual Opportunity Plan (IOP)” is a specific Individualized Career Service, if you create an IEP or IOP with the participant, enrollment into WIOA is required.
- When an IEP or IOP is created and program enrollment is completed, the IEP/IOP creation date and the enrollment date must be the same.
- Whenever you add ANY of the Individualized Career Services (or a Training service) **an IEP or IOP is required.**





*Additional Details in your Local Area Supportive Service Policy

Supportive Services

Support during an Individual's Participation in WIOA

Supportive Services

Can only be provided in support of a participant receiving Career or Training Services

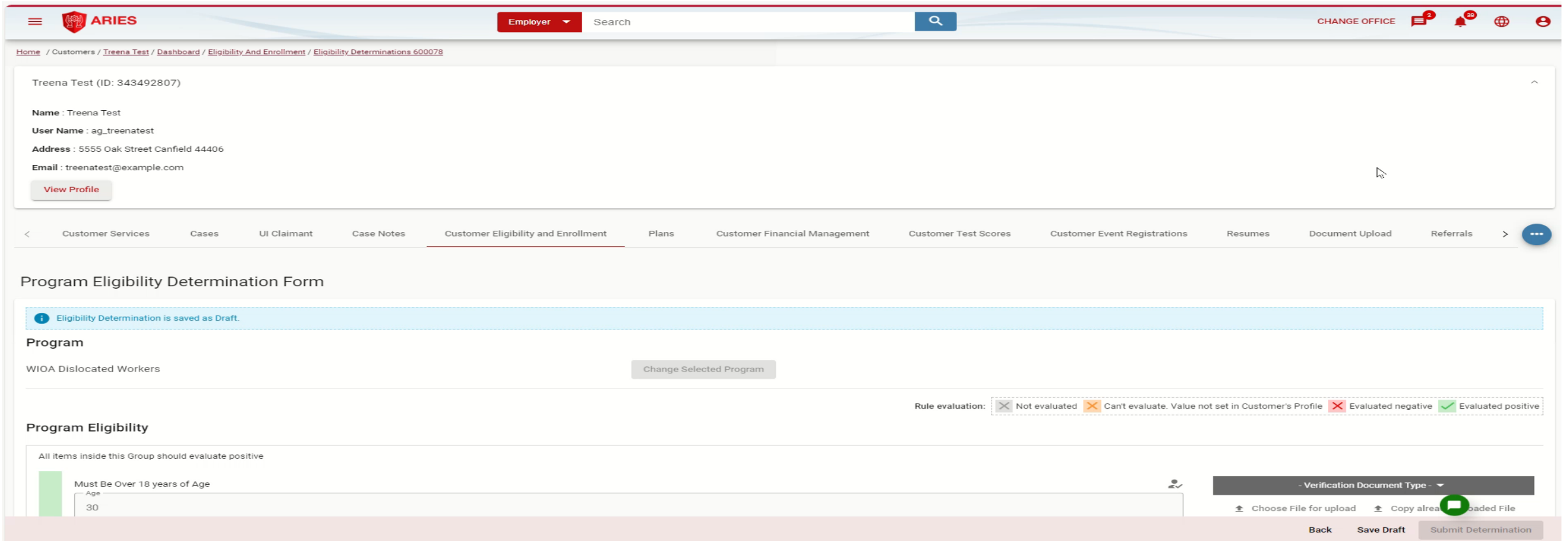
Examples:

- Assistance with transportation
- Assistance with childcare and dependent care
- Linkages to community services
- Assistance with housing
- Needs-related payments
- Assistance with educational testing
- Reasonable accommodations for individuals with disabilities
- Referrals to health care
- Assistance with uniforms or other appropriate work attire and work-related tools
- Assistance with books, fees, school supplies, and other necessary items for students enrolled in post-secondary education classes
- Payments and fees for employment and training-related applications, tests, and certifications
- Legal aid services.

Adding Enrolling Services **Directly** on the Customer Services tab in ARIES

Demo
8 mins/11 secs

Basic Career and Individualized Career Services



The screenshot displays the ARIES (Automated Real-time Eligibility and Information System) interface. At the top, the header includes the ARIES logo, a user dropdown menu set to 'Employer', a search bar, and navigation links like 'CHANGE OFFICE'. The breadcrumb trail indicates the current location: Home / Customers / Treena Test / Dashboard / Eligibility And Enrollment / Eligibility Determinations 600078.

The main content area shows the profile for 'Treena Test (ID: 343492807)'. Fields include Name, User Name (ag_treenatest), Address (5555 Oak Street Canfield 44406), and Email (treenatest@example.com). A 'View Profile' button is present.

Below the profile is a horizontal tab menu with options: Customer Services, Cases, UI Claimant, Case Notes, Customer Eligibility and Enrollment (which is the active tab), Plans, Customer Financial Management, Customer Test Scores, Customer Event Registrations, Resumes, Document Upload, and Referrals.

The 'Program Eligibility Determination Form' is displayed. A blue banner at the top of the form states 'Eligibility Determination is saved as Draft.' The 'Program' section shows 'WIOA Dislocated Workers' as the selected program, with a 'Change Selected Program' button. A 'Rule evaluation' section shows four status boxes: 'Not evaluated' (grey), 'Can't evaluate. Value not set in Customer's Profile' (orange), 'Evaluated negative' (red), and 'Evaluated positive' (green).

The 'Program Eligibility' section contains a note: 'All items inside this Group should evaluate positive'. A specific rule is shown: 'Must Be Over 18 years of Age' with a green status box. The 'Age' field is currently set to '30'. On the right side of the form, there is a dropdown for 'Verification Document Type' and buttons for 'Choose File for upload', 'Copy already loaded File', 'Back', 'Save Draft', and 'Submit Determination'.

24.

Adding Enrolling Services in the Individual Opportunity Plan (IOP) in ARIES

Demo
12 mins/11 secs

ARIES

Customer

Search

CHANGE OFFICE

[Home](#) / [Customers](#) / [Treena Test](#) / [Dashboard](#) / [Eligibility And Enrollment](#) / [Eligibility Determinations 600170](#)

Treena Test- (ID: 343515832)

Name : Treena Test-

User Name : ag_ttest

Email : ttest@example.com

View Profile

<

Customer Services

Cases

UI Claimant

Case Notes

Customer Eligibility and Enrollment

Plans

Customer Financial Management

Customer Test Scores

Customer Event Registrations

Resumes

Document Upload

F

Program Eligibility Determination Form

Eligibility Determination completed.

Program

WIOA Dislocated Workers

Change Selected Program

Rule evaluation:

Not evaluated

Can't evaluate. Value not set in Customer's Profile

Evaluated negative

Program Eligibility

All items inside this Group should evaluate positive

Must Be Over 18 years of Age

Age

27

- Verification Document Type -

Choose File for upload

Copy alre

Max size: 5MB: doc, docx, gif, jpg, pdf, png, rtf, tif, tif

Adding an Enrolling WIOA Service in ARIES

Transactional

1.

Customer Services

2.

Record new customer service

3.

Add Date

4.

+ Add Program(s)

Reportable Individual

☐

WIOA Dislocated Workers

☒

WIOA

☐

Add selected Program(s)

5.

+ Add Service(s)

Career Counseling/ Guidance

Basic Career Service - Staff Assisted

Begins and extends enrollment

☒

Career Planning

Individualized Career Service

Begins and extends enrollment

☐

Comprehensive Assessment

Individualized Career Service

Begins and extends enrollment

☒

Development of an IEP

Individualized Career Service

Begins and extends enrollment

☒

6.

Add selected Service(s)

7.

Submit Customer Service

Service/Assistance has been provided: “Completed”

Transactional

Customer Services

One and Done; Completed Same Day; 1on1 appointment

11/27/2024	11/27/2024	OhioMeansJobs Mah...	HEIDI QUIRION	Assistance establishi...	WIOA Dislocated Wo...	Completed	⋮
11/27/2024	11/27/2024	OhioMeansJobs Mah...	HEIDI QUIRION	Comprehensive Asse...	WIOA Dislocated Wo...	Completed	⋮
11/27/2024	11/27/2024	OhioMeansJobs Mah...	HEIDI QUIRION	Development of an IEP	WIOA Dislocated Wo...	Completed	⋮
11/27/2024	11/27/2024	OhioMeansJobs Mah...	HEIDI QUIRION	Supportive Services- ...	WIOA Dislocated Wo...	Completed	⋮
11/26/2024	11/26/2024	OhioMeansJobs Mah...	HEIDI QUIRION	Initial Assessment	Reportable Individual	Completed	⋮

Items per page:

10

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While assistance to participant has been completed (is over), once these services are entered into ARIES, it keeps the case open for 90 days. 26.

Adding Services to the Individual Opportunity Plan (IOP)

- If your local area uses a hard copy IEP or IOP, make sure the creation and signature date on the hard copy is the same date for the IOP that is created and signed in ARIES.
- If you developed an IEP or IOP, when you record “Development of an IEP” the date you record this service must be the same date you created both your hard copy and e-copy of IEP/IOP.
- If you are adding the enrolling services first to the IOP to trigger participation, make sure once you enter the “Planned Services” to then select “Render.” “Render” means the service has been provided or completed so you are ready to record your actions.

Monitoring Findings

Planned services

Assistance establishing eligibility for Financial aid
Service type: Basic Career Service - Staff Assisted
For program: WIOA Adult

Rendered



Individual Counseling

Service type: Individualized Career Service
For program: WIOA Adult

Rendered



How the Type of Customer Service BEHAVES and impacts your case file

2024 CALENDAR

www.wiki-calendar.com

JANUARY	FEBRUARY	MARCH	APRIL
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
MAY	JUNE	JULY	AUGUST
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Career Services that are Transactional:

- Begins and extends enrollment; **keeps case open for 90 days.**
- If Transactional services aren't added within 90 days, **(and there are no Durational Services open)** the case will soft exit.
- If you catch this and are within 90 days of the soft exit, you yourself can add the needed service/s to re-open the case.
- If you are beyond the 90 days of the soft exit, contact the WIOA mailbox for assistance in re-opening the case.

Service type	Enrollment details	
Basic Career Service - Staff Assisted	Begins and extends enrollment	☐
Basic Career Service - Staff Assisted	Begins and extends enrollment	☐
Individualized Career Service	Begins and extends enrollment	☐
Individualized Career Service	Begins and extends enrollment	☐
Individualized Career Service	Begins and extends enrollment	☐

Career Services that are Durational:

- Begins and extends enrollment; **Once you manually add the actual start date, the case will stay open until manual entry of the Actual End Date.**
- Entry of “Actual Start Date” is required **IF** the assistance **actually** started. Entry of “Actual End Date” is required to align with accurate program participation.
- Examples: Pre-Vocational Activity; English Language Acquisition; Transitional Job; Pre-Apprenticeship

Service type	Enrollment details	
Financial Literacy		
Individualized Career Service	Begins and extends enrollment	☐
Pre-Vocational Activity		
Individualized Career Service	Begins and extends enrollment	☐

What service do I add once the Training Service has been closed
BUT
I now need to assist them with their Job Search?

Add the “**Pre-Vocational Activity**” service (Durational) to keep the record open until employment is found; requires manual closure.

Service Matrix Definition:

Short term services to prepare individuals for unsubsidized employment or training which include development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, professional conduct; Conducted over time (durational).



*Additional Details in your Local Area Follow Up Service Policy

Category 3: Type of Career Service



Follow Up Services Not **Triggering Participation in WIOA**

Category 3:

Provided/Offered Post Exit

Follow Up Services

- Refer to your Local Area Follow Up Policy.
- Made available to a participant placed in unsubsidized employment for a minimum of 12 months following the participant's first date of employment.
- Useful in maintaining employment.
- Examples: walking the individual through their employer benefits, health insurance and providing budgeting assistance.
- Does not extend participation in the WIOA program since provided Post Exit.





Follow Up Procedures

- Follow your local area Follow Up Services policy and follow your "Contact Attempts" procedures when reaching out to customers once they have found gainful employment.
- If the customer does not respond back, document your attempts in Case Notes.
- If customer says they do not want to be contacted again, document the discussion in Case Notes. Follow Up would then be completed.
- If the customer is working, and does not want you to contact them, our Wage Record systems will capture their Post Exit Wage data for your local area performance reporting.
- If a participant completes school and you cannot reach them to assist with their job search, make sure you close the Training Service by adding the "Actual End Date" and enter the credential information if achieved. Make sure to upload a copy of the diploma, degree, certification to validate the attainment. Follow your Contact Attempts procedures and if still no word, enter a case note. Then enter the "Program Completion" using No Contact.
- A customer who finishes WIOA schooling with a credential is a positive outcome.
- Even though you may not be able to reach a customer, if they are working, our Wage Record systems will capture the Post Exit Wage data for your local area performance reporting.

Follow Up Services

Demo
7mins/10 secs

ARIES

Customer

Search

Q

CHANGE OFFICE

3

20

[Home](#) / [Customers](#) / [Treena Test](#) / [Dashboard](#) / [Eligibility And Enrollment](#)

Treena Test- (ID: 343515832)

Name : Treena Test-

User Name : ag_ttest

Email : ttest@example.com

View Profile

<

Customer Services

Cases

UI Claimant

Case Notes

Customer Eligibility and Enrollment

Plans

Customer Financial Management

Customer Test Scores

Customer Event Registrations

Resumes

Document Upload

Referrals

>

Customer Eligibility and Enrollment

Create New

Show Not Eligible & Pending Eligibility Determination Statuses

Program Name	Eligibility Start Date ↓	Eligibility End Date	Eligibility Determination	Enrollment Start Date	Enrollment Status	Office	Actions
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Clear all
WIOA Dislocated Workers	11/27/2024	02/24/2025	Eligible	11/27/2024	Closed	OhioMeansJobs Mahoning County	

Items per page:

10

1 – 1 of 1

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OHID

Office of Workforce Development

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Browser Compatibility: Mac – Firefox 80, Safari 14.0 | Windows – Chrome 85, Firefox 60

Help

Ohio

OhioMeansJobs.com.

To Recap Service Behavior in ARIES

- Basic Career Services Type 1/Reportable Individual Services:

Does not begin or extend enrollment.

Enrollment details

Does not begin or extend enrollment
- Basic Career Services Type 2 & Individualized Career Services/ Customer Services:

Begins and Extends Enrollment; Service keeps case open for 90 days (Transactional)
OR
Begins and Extends Enrollment; Service keeps case open indefinitely until manual closure is completed

Begins and extends enrollment

(Durational)

Actual Start Date

12/02/2024

Actual End Date

Date in mm/dd/yyyy format
- Follow Up: Entered post exist when in unsubsidized employment; Does not begin or extend enrollment; entered on the “View Program Completion” hyperlink after Program Completing.

Program Completion

View Program Completion

Program Completion Date	11/29/2024
Reason	Employment

ARIES Notifications:

- 30; 60; 80 Day Reminders to monitor participant's progress should additional services need added to keep case open.
- Notification includes a hyperlink into the Participant case to provide any needed case management.



customers about to exit

You have been assigned a Customer Caseload

Customers for Quarterly followup

Customer Caseload Table

Status	Days Until Exit	Last Qual. Service
Filter	Filter	Filter
Enrolled		06/18/2024
Enrolled	79	06/13/2024
Enrolled		06/19/2024
Enrolled	85	06/19/2024
Enrolled		04/02/2024
Enrolled	75	06/09/2024
Enrolled		01/31/2024
Enrolled	79	06/13/2024
Follow up		02/28/2024

If "Days Until Exit" is blank, participant is either in training, whereby the case is Open

OR

Customer has been exited and is in Follow Up whereby Follow Up services should be offered, and Performance Surveys collected.

WIOA Service Matrix

Liz King



WHAT...WHEN...FOR HOW LONG

If it appears there are similar services based on the definition, simply add (1)



Thank you for Attending!

Questions?

WIOAQNA@jfs.ohio.gov