



Department of  
Job & Family  
Services

# WIOA Adult and Dislocated Worker Career Services

# Hello!

## Introductions

Heidi Quirion; WIOA ADW & Rapid Response Program Administrator

Heather Ponish; WIOA Employment Support Administrator

Emily Ostrander; Social Sciences Research Supervisor

Donna Stickel; ARIES Project Manager

Abbea Baker; Policy Program Administrator

## Housekeeping

# Agenda

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

# Workforce Delivery in the OMJ Centers

## **Thank you!!!!**

Your efforts support job seeker employment security and advancement.

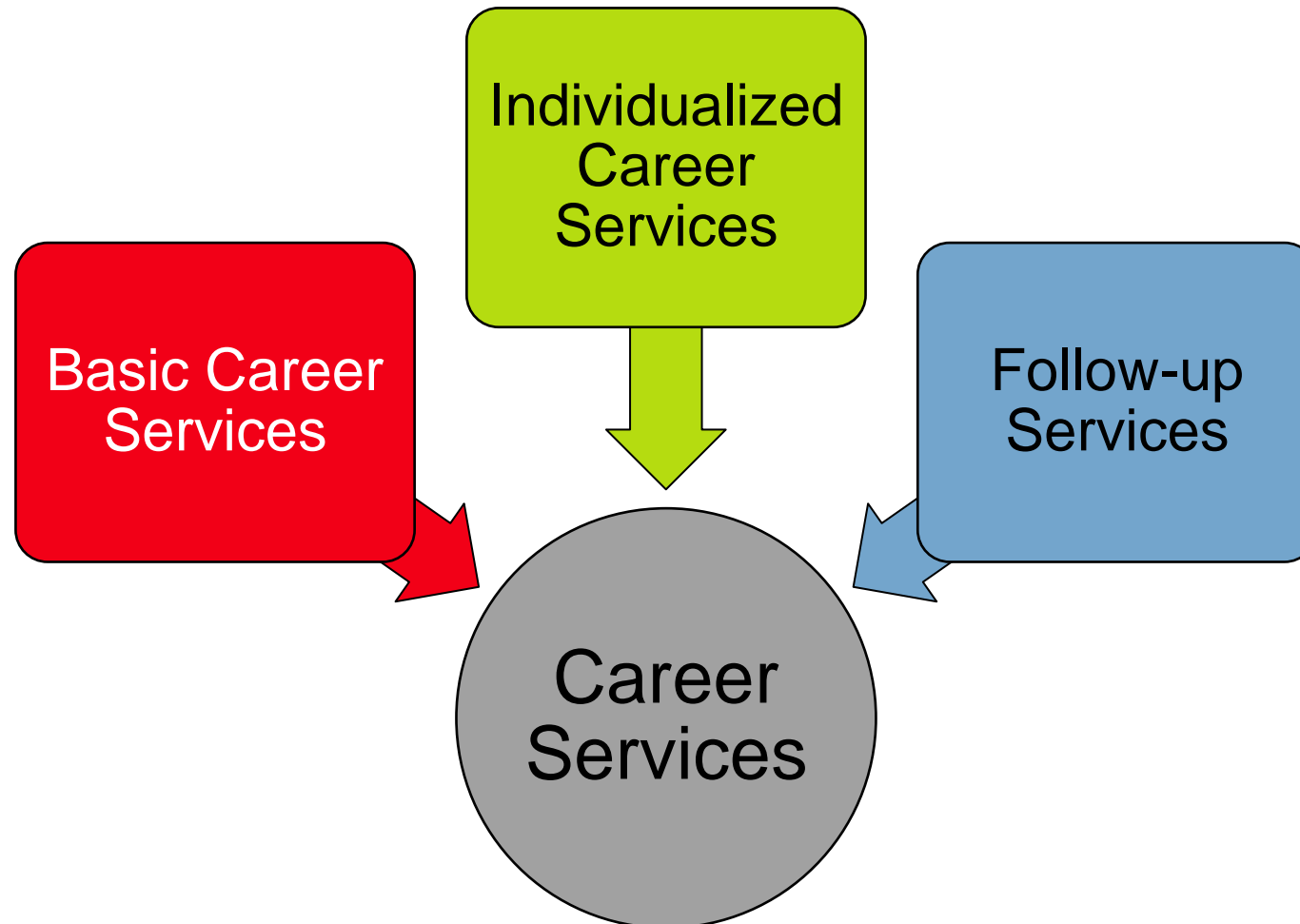
## WIOA Services

Basic Career Services	Individualized Career Services	Training Services	Supportive Services	Follow Up Services
<p>(Non Triggering)</p> <ul style="list-style-type: none"> <li>• Outreach/Orientation</li> <li>• WIOA Eligibility Determination</li> <li>• Self Serve Job Search</li> </ul> <p>(Triggering)</p> <ul style="list-style-type: none"> <li>• Career Counseling</li> <li>• Initial Assessment</li> <li>• Staff Assisted Job Search</li> </ul>	<ul style="list-style-type: none"> <li>• Comprehensive Assessments</li> <li>• Development of an Individual Employment Plan (IEP/IOP)</li> <li>• Financial Literacy services</li> </ul> <p>(Triggering)</p>	<ul style="list-style-type: none"> <li>• Occupational Skills Training</li> <li>• On the Job (OJTs)</li> <li>• Incumbent Worker (IWTs)</li> <li>• Skill Upgrading</li> <li>• Adult Education and Literacy</li> </ul> <p>(Triggering)</p>	<ul style="list-style-type: none"> <li>• Assistance with Transportation</li> <li>• Assistance with Child Care</li> <li>• Assistance with Housing</li> <li>• Needs Related Payments</li> <li>• Assistance with Work Attire</li> <li>• Books, Fees, School Supplies</li> </ul> <p>(Triggering)</p>	<ul style="list-style-type: none"> <li>• Explaining Employer benefits or health insurance</li> <li>• Budgeting</li> <li>• Financial literacy</li> </ul> <p>(Non Triggering)</p>

# WIOA Career Services Policy

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

[WIOAPL 15-08.1 Career Services](#)



## 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

[wIOAPL 15-21.1 OMJ Center Services for Universal Customers](#)

- In ARIES, these are called **Reportable Individual Services**



## 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**

11.

## 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.

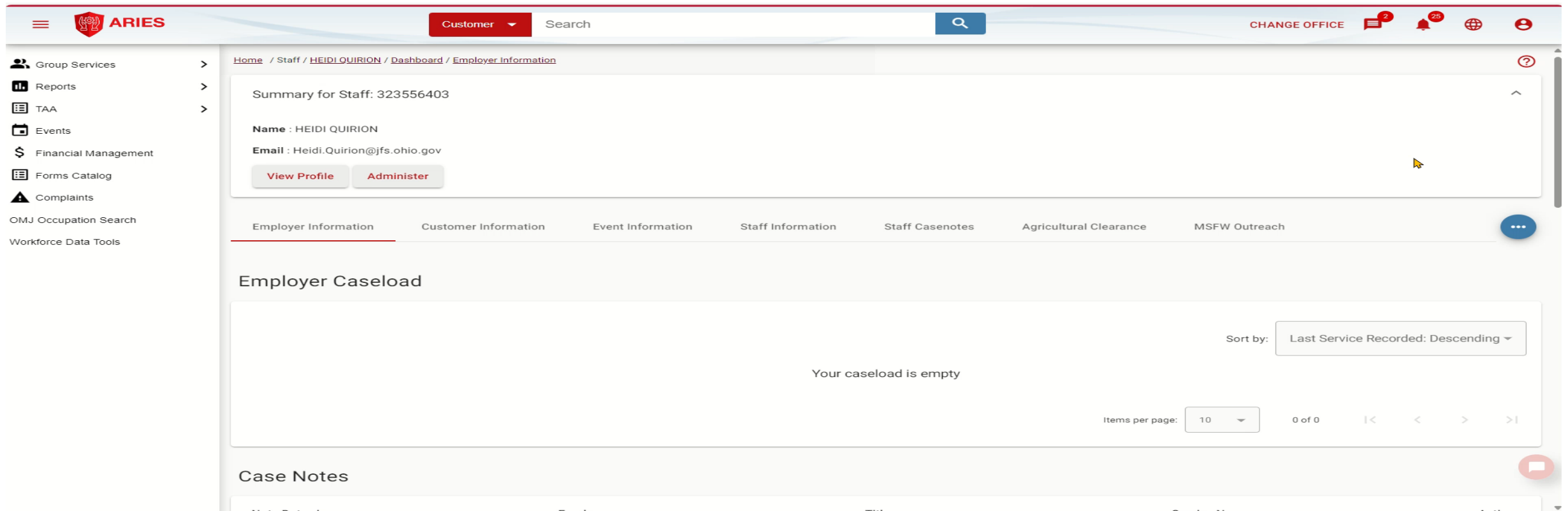
Methods: OMJ Center Kiosk; OhioMeansJobs.com; Staff providing Reportable Individual services in ARIES

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

## Reportable Individual Services in ARIES = Basic Career Non-Triggering Services

Demo

4 mins/7 secs.



The screenshot displays the ARIES (Automated Reporting and Information System) web application. The interface includes a top navigation bar with the ARIES logo, a user role dropdown set to 'Customer', a search bar, and a 'CHANGE OFFICE' button. On the right side of the top bar are notification icons for messages (2), alerts (25), and a globe. A left sidebar contains a menu with options: Group Services, Reports, TAA, Events, Financial Management, Forms Catalog, Complaints, OMJ Occupation Search, and Workforce Data Tools. The main content area shows the breadcrumb path: Home / Staff / HEIDI QUIRION / Dashboard / Employer Information. Below this is a summary card for staff member HEIDI QUIRION (ID: 323556403), displaying their name, email (Heidi.Quirion@jfs.ohio.gov), and buttons for 'View Profile' and 'Administer'. A horizontal tab bar below the summary card includes: Employer Information (selected), Customer Information, Event Information, Staff Information, Staff Casenotes, Agricultural Clearance, and MSFW Outreach. The 'Employer Caseload' section shows a message 'Your caseload is empty' and a 'Sort by' dropdown set to 'Last Service Recorded: Descending'. At the bottom, the 'Case Notes' section is visible. The interface also features a 'Items per page' dropdown set to 10 and pagination controls showing '0 of 0' items.

13.

## What do Reportable Individual Services Look Like in ARIES?

### 1. Reportable Individual Services

< Customer Services Cases UI Claimant

Service Date\*  
03/20/2024  
Date in mm/dd/yyyy format.

Program or Grant \*: Select Program or Grant

2.

Programs and Grants

Select eligible programs or grants ⓘ

☒ Reportable Individual - Eligible

☐ WIOA Adult - Eligible

Cancel Add Programs or Grants

3.

Examples:

- ☒ Eligibility Determination
- ☒ Orientation
- ☒ Intake
- ☐ Job Search Assistance Self Serve

Enrollment Details

Does not begin or extend enrollment



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 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, enrollment into WIOA is required.
- When an IOP is created and program enrollment is completed, the IOP creation date and the enrollment date should be the same.
- Whenever you add ANY of the Individualized Career Services (or a Training service) an 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.

Customer

CHANGE OFFICE

---

Home / Customers / Tabert Test / Dashboard / Eligibility And Enrollment

Tabert Test (ID: 341891510)

**Name :** Tabert Test

**User Name :** ag\_taberttester

**Address :** 1212 Thomas Lane Canfield 44406

**Email :** taberttester@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](#)
[Docur](#)

### Customer Eligibility and Enrollment

[Create New](#)

☒ Show Not Eligible & Pending Eligibility Statuses

Program Name	Eligibility Start Date ↓	Eligibility End Date	Eligibility Determination	Enrollment Start Date	Enrollment Status	Office	Actions
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<a href="#">Clear all</a>
WIOA Adult	06/14/2024	09/11/2024	Eligible		Pending		

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[<](#)
[>](#)
[>>](#)

Office of Workforce Development
Privacy Policy
Help





## Adding an Enrolling WIOA Service in ARIES

Transactional

1.

Customer Services

Record new customer service

Recording service for Jasper Test

Service Date\*

06/14/2024

Date in mm/dd/yyyy format.

Program or Grant \*

Select Program or Grant

2.

### Programs and Grants

Select eligible programs or grants <sup>i</sup>

☐

Reportable Individual - Eligible

☒

WIOA Adult - Active Enrollment

Cancel

Add Programs or Grants

3.

☒ Career Planning

Enrollment Details

Begins and extends enrollment

☒ Comprehensive Assessment

Enrollment Details

Begins and extends enrollment

☒ Development of an IEP

Enrollment Details

Begins and extends enrollment

4.

25.

Record Service



Service/Assistance has been provided: “Completed”

Transactional

Customer Services

One and Done; Completed Same Day; 1on1 appointment



Entry date	Actual date ↓	Office	Last modified by	Service name	Program / Grant	Status	Actions
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	Clear all
06/14/2024	06/14/2024	OhioMeansJobs A...	HEIDI QUIRION	Career Planning	WIOA Adult	Completed	⋮
06/14/2024	06/14/2024	OhioMeansJobs A...	HEIDI QUIRION	Comprehensive A...	WIOA Adult	Completed	⋮
06/14/2024	06/14/2024	OhioMeansJobs A...	HEIDI QUIRION	Development of a...	WIOA Adult	Completed	⋮

While assistance to participant 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

- If your local area uses a hard copy IEP or IOP, make sure the creation and signature date is the same date for the IOP that is created in ARIES.
- 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.

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; if no other services are entered or open (such as a training service), must enter a transactional within 90 days for case file to remain active and open.
- If Transactional services aren't added within 90 days, 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.


Enrollment Details


Begins and extends enrollment


## Career Services that are Durational:


- Begins and extends enrollment; once the actual start date is entered, 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 End Date 

Actual Start Date 

Actual End Date 

Completion Status 

Enrollment Details

Begins and extends enrollment



\*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 or providing budgeting assistance.
- Does not extend participation in the WIOA program since provided when individual is employed.





## 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.

If you do provide a Follow Up Service...

DEMO  
4 mins, 45 secs

ARIES

Customer

Search

CHANGE OFFICE

Customer Caseloads

Name	SSN	County	Veteran	CH 31	Status	Days Until Exit	Last Qual. Service	Programs	Actions
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	Clear all
Tabert Test		Mahoning	No	No	Enrolled		06/18/2024	WIOA Adult	
Tabert Test		Mahoning	No	No	Enrolled	82	06/13/2024	WIOA Adult	
Thadius Test		Mahoning	No	No	Enrolled		06/19/2024	WIOA Dislocated Workers	
Talula Test		Lucas	No	No	Enrolled	88	06/19/2024	WIOA Adult	
Tanner Test		Lucas	No	No	Enrolled		04/02/2024	Incumbent Worker	
Baxter Test		Hancock	No	No	Enrolled	78	06/09/2024	WIOA Dislocated Workers	
Taffy Test		Hancock	No	No	Enrolled		01/31/2024	WIOA Adult	
Trigger Test		Mahoning	No	No					
Jasper Test			No	No	Enrolled	82	06/13/2024	WIOA Adult	
Bart Test		Mahoning	No	No	Follow up		02/28/2024		

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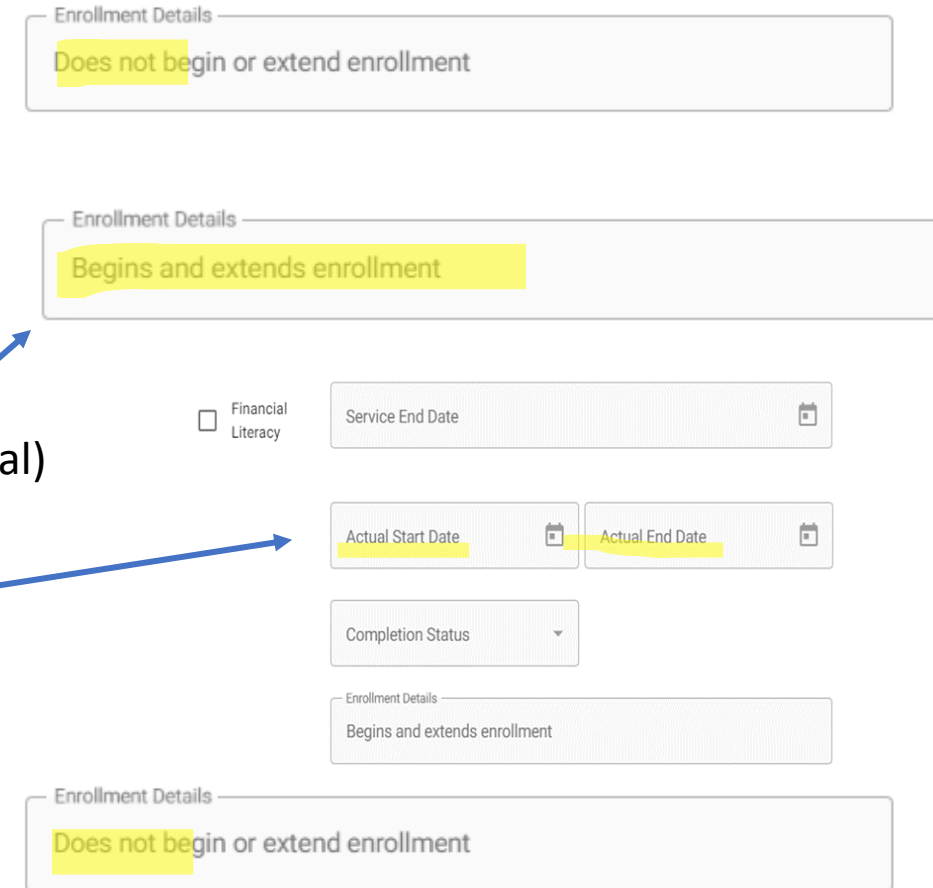
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## To Recap Service Behavior in ARIES

- Basic Career Services Type 1/Reportable Individual Services:  
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 (Durational)
- Follow Up/Reportable Individual Services: Entered post exist when in unsubsidized employment; Does not begin or extend enrollment.



Enrollment Details  
Does not begin or extend enrollment

Enrollment Details  
Begins and extends enrollment

☐ Financial Literacy

Service End Date

Actual Start Date

Actual End Date

Completion Status

Enrollment Details  
Begins and extends enrollment

Enrollment Details  
Does not begin or extend enrollment



### 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
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="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

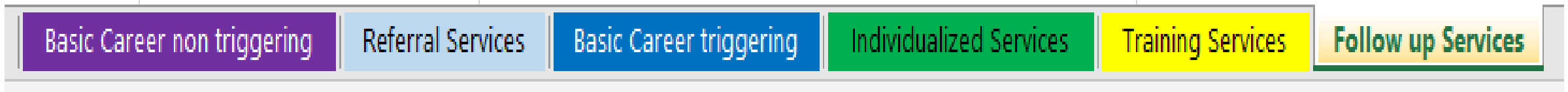
If "Days Until Exit" is blank, participant is either in training, whereby the case is Open

OR

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

# WIOA Service Matrix

Heather Ponish



## Exciting News:

**Step One Completed: Identify the service and provide a definition**

Step Two: In the upcoming weeks, we will be reviewing in depth these services, looking for duplication to see if we can consolidate services.

Step Three: Announce Service updates when available.

**For now, if it appears there are similar services based on the definition, simply add (1).**



# Thank you for Attending!

## Questions?

[WIOAQNA@jfs.ohio.gov](mailto:WIOAQNA@jfs.ohio.gov)