



Montana Department of LABOR & INDUSTRY

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2 **Division: Workforce Services Division**
3 **Category: WIOA**
4 **Effective Date: 10/1/2018**
5 **Last Revised: N/A**
6 **Policy No.: 23-18**

7 Program Participation and Exit Policy

8 **Background:** WIOA has changed the definition of a Client. A client is someone who will affect performance
9 outcomes. Under WIA, anyone who used the workforce system was considered a client and we were responsible
10 for performance outcomes. In addition, a person's "exit" was extended anytime they received a self-service.

11 **Scope:** This policy applies to all service providers operating WIOA Title I or Title III programs, WIOA Title I or Title
12 III program managers, WIOA fiscal officers and the WIOA monitoring team. This policy is effective October 1,
13 2018.

14 **Policy:**

- 15 • In WIOA, self-service and information only services do not start a participation period, nor do they extend
16 exit. WIOA has two categories of people, that count toward performance, who use the workforce
17 system: Reportable Individuals and Clients.

18 **Reportable Individuals:**

- 19 • Reportable Individuals are people who engage with the workforce system on an initial level but do not
20 complete the requirements to become clients. They are people who:
- 21 • Provide identifying information;
 - 22 • Only use self-service;
 - 23 • Only receive information-only services or activities; or
 - 24 • For the purposes of Vocational Rehabilitation and Blind Services (VRBS) program, a student with a
25 disability who solely receives pre-employment transition services, does not apply for VRBS services, is
26 not determined eligible, and does not have an approved Individual Plan for Employment (IPE).
 - 27 • Reportable individuals do not have performance goals and cannot be used to impose sanctions on the
28 State. Reportable Individuals will be tracked and reported but do not help or hurt in performance.

29 **Client:**

- 30 • WIOA Title I and Title III: Adult, Dislocated Worker, and Wagner-Peyser:
- 31 • A client is a reportable individual who has received services other than self-service or informational-only
32 services and if applicable, meets all program requirements such as [eligibility determination](#).
 - 33 • Youth, Title I:
 - 34 • A client is a reportable individual who has satisfied all applicable program requirements for the
35 provision of services, including [eligibility determination](#), an objective assessment, development of an
36 ISS, and received one or more of the 14 Youth Program Elements.
 - 37 • Clients are included in performance outcomes.

1 Exit:

- 2 • The date of exit cannot be determined until 90 days have elapsed since the client last received a
3 countable service and no services are planned for the future. The exit date is applied retroactively to the
4 last service date.
- 5 • Self-service, informational only services or activities, and follow-up services do not delay, postpone or
6 affect the date of exit.

7 Monitoring and Evaluation:

- 8 • A formal monitoring will be conducted on an annual basis by the entity designated by SWIB.

9 References:

- 10 • [TEGL 10-16 Change 1, Performance Accountability Guidance](#)