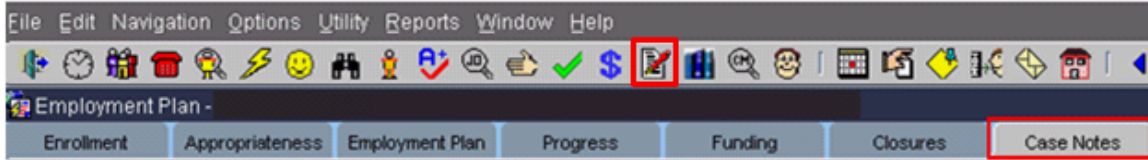
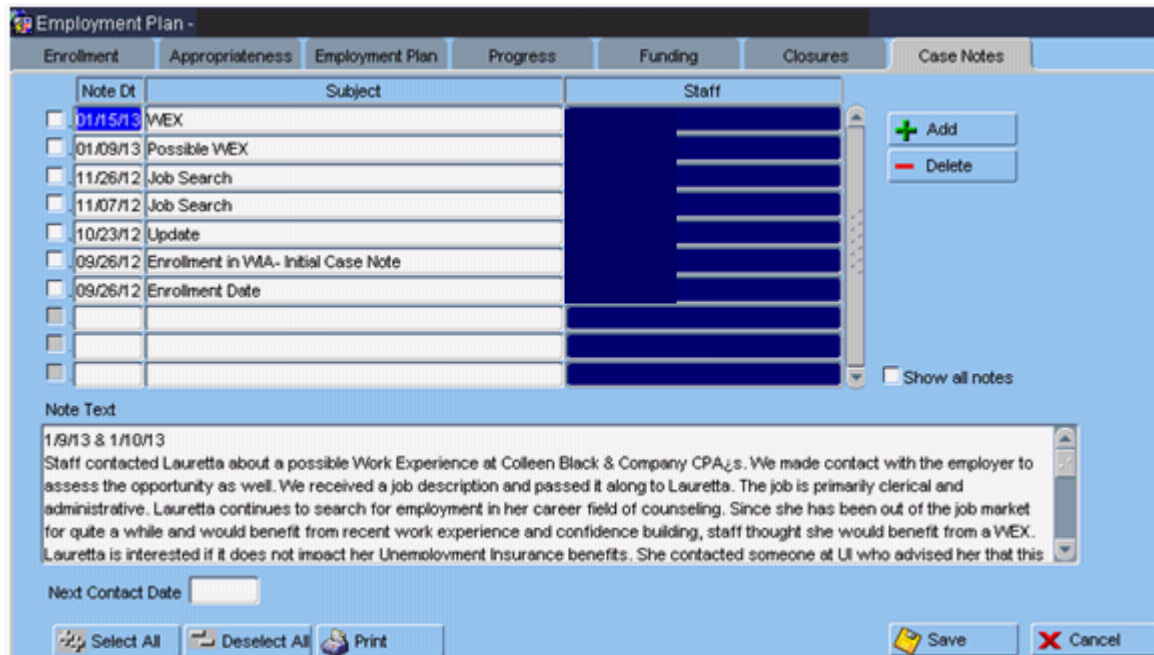


WIOA EMPLOYMENT PLAN, PART 4: CASE NOTES AND CLOSURES TABS

Case Notes:



To add a case note, click on the Case Note tab on the Employment Plan screen. Double click in the **Note Dt** field to bring up a calendar, or type in the date of your note. Enter a subject, then the text of the case note.

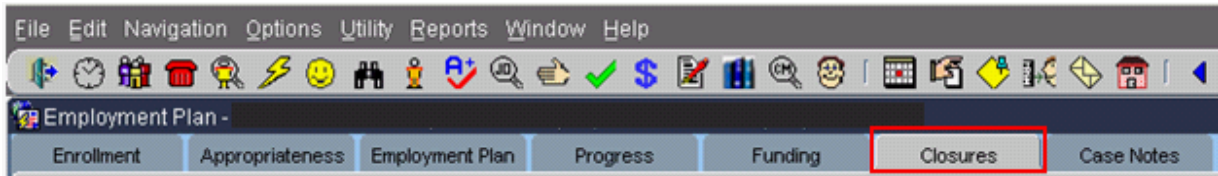


Save.

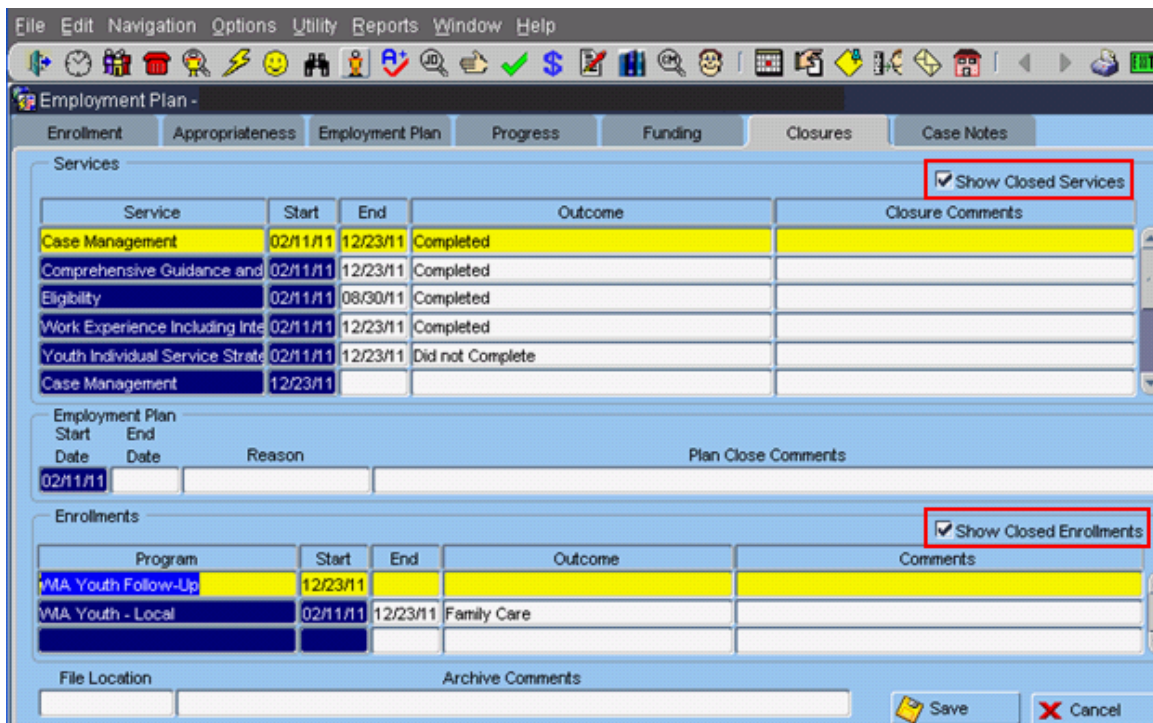
If you enter a date in the **Next Contact Date** field and Save, a task will appear on the Scheduler to remind you to make contact on that date. This is a useful reminder for maintaining contact.

Case Notes can be seen by everyone who has access to MontanaWorks.

Closures:



There are three parts of the Closures tab that need to be completed if your participant is done with their plan or needs to be exited. Do not close services, enrollments, or employment plans until all bills have been paid and services have been completed.

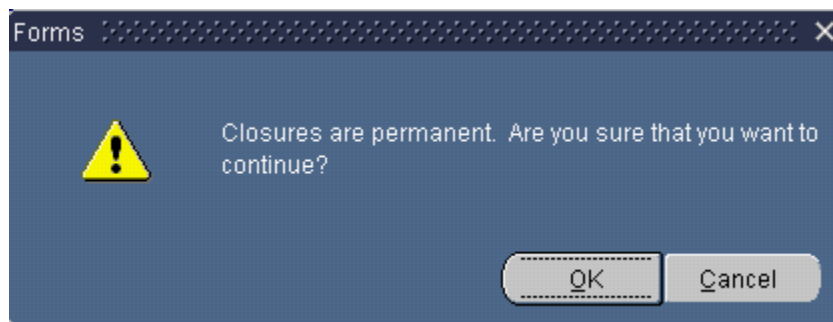


You can view closed services by checking the Show Closed Services box on the Closures tab. You can view closed enrollments by checking the Show Closed Enrollments box.

End Employment Plan—Outcome Other than Employment:

The screenshot shows the 'Employment Plan' software interface. It features several tabs: Enrollment, Appropriateness, Employment Plan, Progress, Funding, Closures, and Case Notes. The 'Employment Plan' tab is active. Below the tabs, there are three main sections: Services, Employment Plan, and Enrollments. Each section has a table with columns for Start, End, Outcome, and Closure Comments. The Services table has a row for 'Case Management' with 'Completed' in the Outcome field, marked with a '1'. The Enrollments table has a row for 'WA Youth Follow-Up' with 'Family Care' in the Outcome field, marked with a '2'. The Employment Plan section has a table with columns for Start Date, End Date, Reason, and Plan Close Comments, with a '3' over the Reason field. At the bottom, there are fields for File Location and Archive Comments, and buttons for Save and Cancel.

1. Close any Services that are open. Enter an end date for the service, or double click in the field and choose an end date. Enter a closure outcome by double clicking in the Outcome field and choosing the appropriate outcome reason.
2. Close the Enrollment. Enter an end date for the enrollment, or double click in the field and choose an end date. Enter a closure outcome by double clicking in the Outcome field and choosing the appropriate outcome reason. Click OK on the pop-up if you wish to continue.

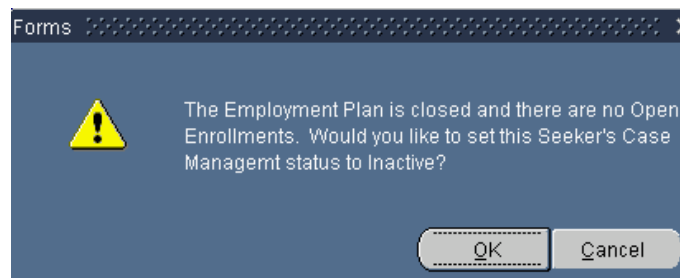


3. End Plan—Outcome Not Employed:

Youth: Do not end employment plans for Youth participants unless there is an appropriate reason (such as ended due to an Exclusion outcome such as health/medical). The employment plan must be open during follow-up, which is required for at least four quarters.

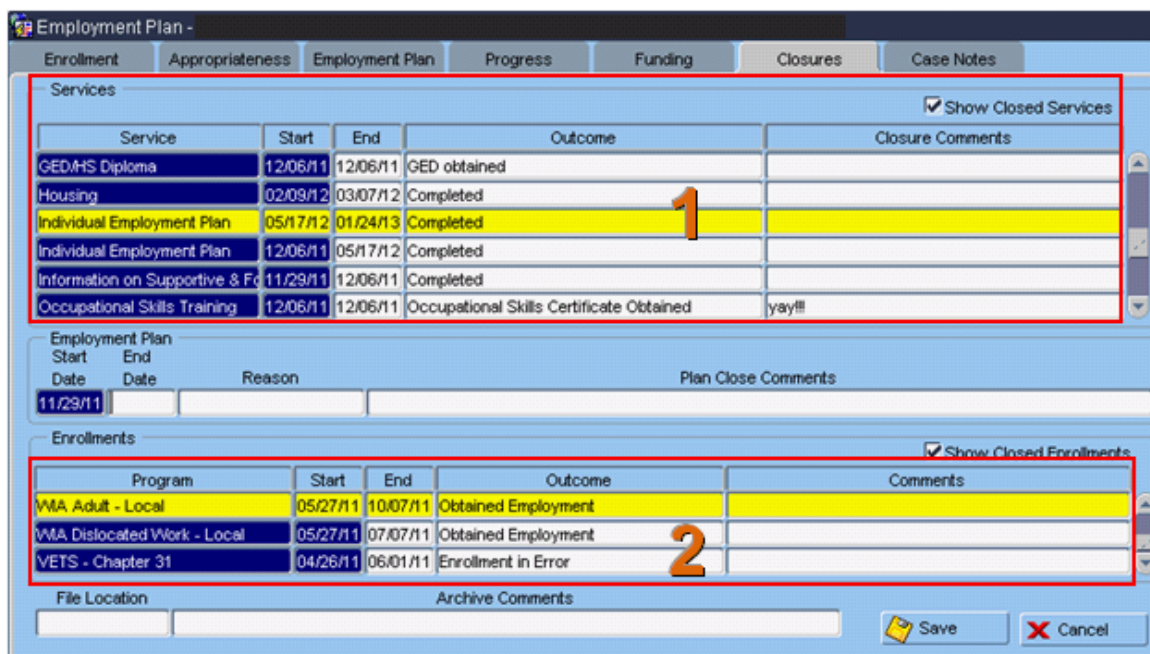
Adult and Dislocated Worker: If an Adult or Dislocated Worker participant's enrollment is ended for a reason other than employment, close the Employment Plan. Enter an end date for the employment plan, or double click in the field and choose an end date. Enter a closure reason by double clicking in the reason field and choosing an appropriate reason. De-obligate money and inactivate the participant. Do not inactivate unless totally done entering payments, etc.! Save.

Click OK on the pop-up if you wish to inactivate case management.



End Employment Plan—Outcome Obtained Employment:

If an Adult or Dislocated Worker participant's enrollment is ended because they attained employment, do not close the Employment Plan. Keep the existing Employment Plan open. Enroll the participant in the appropriate Follow-Up program. Refer to **WIOA Employment Plan Part 5** for instructions related to Follow-Up.

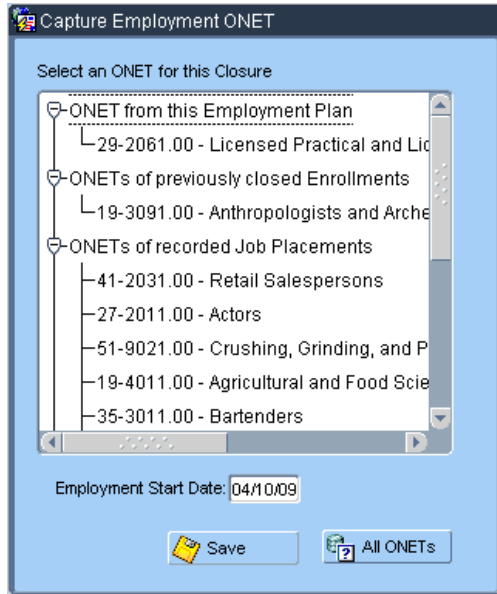


1. Close all services that are open except Case Management service. Enter an end date for the services you're closing, or double click in the field and

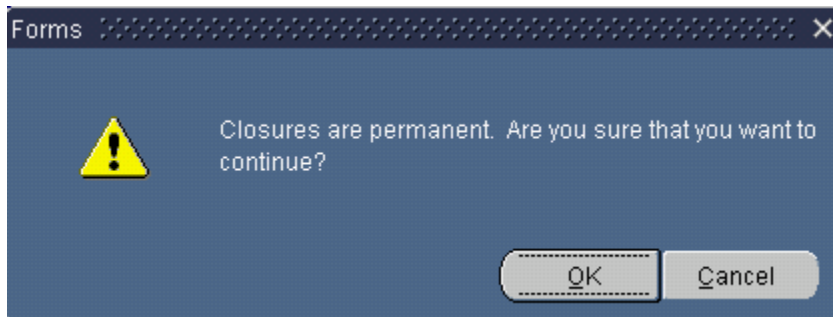
choose an end date. Enter a closure outcome by double clicking in the Outcome field and choosing the appropriate outcome reason.

2. Close the Enrollment. Enter an end date for the enrollment, or double click in the field and choose an end date. Enter a closure outcome by double clicking in the Outcome field and choosing the appropriate outcome reason. Save.

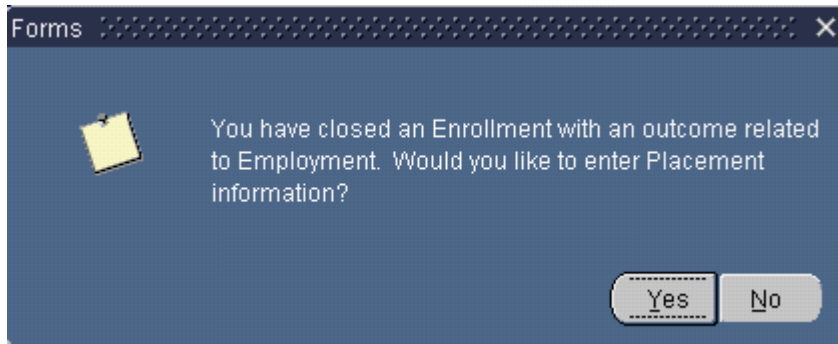
The ONet pop-up will appear. Choose an ONet code and Save.



The following message will pop up on the screen:



This pop-up will appear. Click OK on the pop-up if you wish to enter placement information at this time. Entry of Placement information is required, but you can enter the information later.



If you answer Yes to enter Placement information, the following screen pops up:

Customer (Seeker) Placement for PEDRINA S MESSINGAROUND (XXXX-XX-9999) | Sue Butler (406)444-2958

Placement History

Start Date	Employer Name	Salary	Interval	Hrs/Wk	Job Order #
	SMOKER FRIENDLY				575471
04/08	JIMS CONCRETE - THE ORIGINAL ONE	25.00	Hourly	40	
02/08	barney's burger joint	6.75	Hourly	40	
01/08	JIMS CONCRETE - BELGRADE	11.00	Hourly	11	
01/08	PIN & CUE	10.00	Hourly	40	
01/08	JIMS CONCRETE AND WHAT NOT	22.00	Hourly	11	
01/08	JIMS CONCRETE - BELGRADE	22.00	Hourly	11	
01/08	JIMS CONCRETE - BELGRADE	44.00	Hourly	33	
01/08	JIMS CONCRETE - THE ORIGINAL ONE	33.00	Hourly	44	
01/08	bobo	10.00	Hourly	40	
01/08	JIMS CONCRETE - THE ORIGINAL ONE	6.00	Hourly	40	
12/07	JIMS CONCRETE - THE ORIGINAL ONE	7.00	Hourly	40	
07/07	Joe's Hogwash	8.35	Hourly	35	
12/06	JIMS CONCRETE AND WHAT NOT	22.00	Hourly	22	
01/05	IT IMPLEMENTER	5.15	Hourly	24	
12/04	Test employers	12.00	Hourly	40	

Job Order + Add - Delete

Click on the Add button.

Placement -

Employer Name: Joe's Bar and Grill Contact: Joe Sinkalowski
 Employer Address: 222 W Broadway Contact Phone: (406)444-2547
 HELENA MT 59601 Country: [Dropdown]

Inactivate Seeker

Start Date: 04/09 Hours Per Week: 40
 Salary Interval: Hourly Salary: 7.50
 O*NET: 35301100 Bartenders
 Date Entered: [Dropdown] by: [Dropdown]

Added To Work History Print On Resume

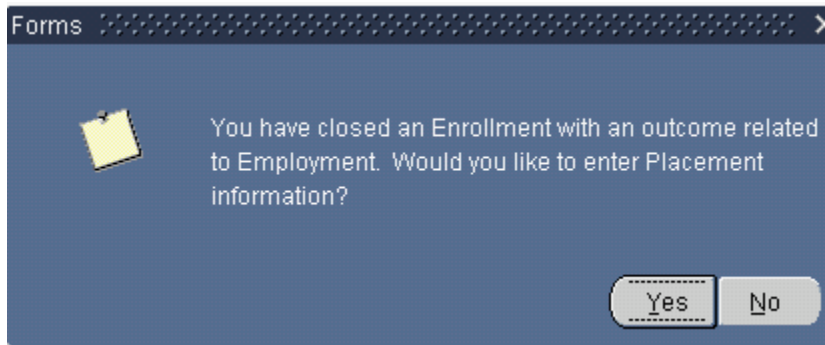
Job Title: [Text Field]
 Job Description: [Text Area]

End Date: [Text Field] Months Worked: [Text Field]

Save Cancel Close

Add Placement information. Save and Close when done.

If you want to add Placement information later, click on No on this pop-up.



You can add placement information later by going to the Navigation drop down at the top of the MontanaWorks screen and choosing Seeker Placement.



Follow the process outlined above to enter Placement information.

NOTE: Do not close the Employment Plan for an Adult or Dislocated Worker participant exited to employment. Add appropriate follow-up enrollment and follow-up services to the existing plan.

See Employment Plan Part 5 for further information regarding Follow-Up.

If you have any difficulties, or receive a message in the lower left-hand corner that says, "Field protected against update," email the WIOA Mworks Help Desk at DDLWSDMWorksWIOAHelp@mt.gov or email/call one of the WIOA staff.

Continue with 'WIOA Employment Plan Part 5.'