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

#### Case Notes:

Eile	⊑dit	Naviga	ation	Qptio	ns	Utility	Re	ports	₩ir	ndow	He	lp											
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🙀 Ei	mploy	ment P	'lan -																				
E	inrollme	ent	Appr	opriate	nes	s Em	ployn	nent Pl	lan	P	rogre	ss	Ι	F	undin	g	L	Clos	ures		Cas	e Not	es

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.

ro	liment	Appropriateness	Employment Plan	Progress	Funding	Closures	Case Notes
	Note Dt		Subject		Staff		
1	01/15/13	WEX					Add
ų	01/09/13	Possible WEX					Dalata
1	11/26/12	Job Search					- Delete
1	11/07/12	Job Search					
l	10/23/12	Update					
ł	09/26/12	Enrolment in WA- Init	tial Case Note			?:	
	09/26/12	Enrolment Date					
1							
4							Show all notes
9/1 af isk ini r c	13 & 1/10, f contacto ess the op inistrative quite a wit retta is int	/13 ed Lauretta about a pr pportunity as well. We . Lauretta continues t nile and would benefit erested if it does not i	ossible Work Experier received a job descr to search for employm from recent work ex impact her Unemployn	ice at Colleen Bi ription and pass rent in her caree perience and co nent insurance t	lack & Company CPA¿s ed it along to Lauretta. T er field of counseling. Si vnfidence building, staff benefits. She contacted	. We made contact The job is primarily ince she has been thought she would i someone at UI wh	t with the employer to clerical and out of the job market d benefit from a WEX. to advised her that this
ex	t Contact	Date					

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:**

Eile Edit	Navigation	<u>O</u> ptions	Utility Reports y	<u>M</u> indow <u>H</u> elp			
1 😌	🛱 🗃 🧍	\$ 5 0	) 🚜 🖞 😍 @	🗟 🧹 💲	🖹 🚺 🔍 🥴 I	🔳 崎 外 🎚	< 🎨 💼 🛯
🙀 Employr	ment Plan -						
Enrollme	ent App	ropriatenes	s Employment Plan	Progress	Funding	Closures	Case Notes

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.

Eile Edit Navigation Option	is <u>U</u> tility (	Reports	; <u>W</u> indow <u>H</u> elp			
🌗 🕑 🏦 🗃 🔍 🌽	🙂 👫 🖞	2 😲	@ 🖒 🖌 💲 🖹	1 🕲 🕲 🛙	I 🖪 👎 🛙	HE 😌 💼 I 🔹 🕨 🌛 🎹
🙀 Employment Plan -						
Enrolment Appropriater	ness Empl	oyment A	Plan Progress	Funding	Closures	Case Notes
Services						Show Closed Services
Service	Start	End	Outcor	ne	Į III III III III III III III III III I	Closure Comments
Case Management	02/11/11 1:	2/23/11	Completed			<u> </u>
Comprehensive Guidance and	02/11/11 12	2/23/11	Completed			
Eligibility	02/11/11 0	3/30/11	Completed			
Work Experience Including Inte	02/11/11 1	2/23/11	Completed			
Youth Individual Service Strate	02/11/11 12	2/23/11	Did not Complete			
Case Management	12/23/11					
Employment Plan Start End	9000			Plan Close	Commente	
02/11/11	33011			Pidit Close	Commentes	
Encolmente		1				
Chronmenus						Show Closed Enrollments
Program	Start	Enc	Outcom	ne 🗌		Comments
MA Youth Follow-Up	12/23/1	1				
WIA Youth - Local	02/11/1	1 12/23	/11 Family Care			
						J
File Location			Archive Comments			
						Note: Save X Cancel

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.

🙀 Employment Plan -							
Enrolment Appropriater	ness Emplo	ovment Plan	Progress	Funding	Closures	Case Notes	
Services						Show Closed	Services
Service	Start	End	Outo	ome		Closure Comments	
Case Management	02/11/11 12	2/23/11 Cor	npleted				
Comprehensive Guidance and	02/11/11 12	2/23/11 Cor	npleted				
Eligibility	02/11/11 08	3/30/11 Cor	npleted	-			
Work Experience Including Inte	02/11/11 12	2/23/11 Cor	npleted				
Youth Individual Service Strate	02/11/11 12	2/23/11 Did	not Complete				
Case Management	12/23/11						
Employment Plan Start End Date Date Re 02/11/11	ason		}	Plan C	lose Comments		
- Enrolments						Show Closed	Enrolments
Program	Start	End	Outco	me		Comments	
WA Youth Follow-Up	12/23/1	1		9			A
WIA Youth - Local	02/11/1	1 12/23/11	Family Care	4			
File Location			Archive Comments				
						🆉 Save 🛛 🗙	Cancel

## End Employment Plan—Outcome Other than Employment:

- 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.

🙀 Employmen	t Plan -							
Enrolment	Appropriateness	Employn	nent Plan	Progress	Funding	Closures	Case Notes	
- Services -							Show Clos	sed Services
S	ervice S	tart En	d	Outo	ome		Closure Comments	
GED/HS Diplo	ma [12/	06/11 12/00	6/11 GED	obtained				
Housing	02/	09/12 03/07	7/12 Com	pleted	<u> </u>			
Individual Emp	oloyment Plan 05	17/12 01/24	4/13 Comp	pleted				
Individual Emp	oloyment Plan 12/	06/11 05/11	7/12 Comp	pleted				
Information o	n Supportive & Fo 11/	29/11 12/00	6/11 Comp	pleted				
Occupational	Skills Training 12/	06/11 12/06	6/11 Occu	apational Skills Certif	icate Obtained	yay!!		
Employment Start E Date D 11/29/11	:Plan nd ate Reaso	n [			Plan Ci	lose Comments		)
Enroliments	F						Show Clos	sed Forolments
	Program	Start	End	Outco	me		Comments	
WA Adult - L	ocal	05/27/11	10/07/11	Obtained Employmen	t			
VMA Dislocate	ed Work - Local	05/27/11	07/07/11	Obtained Employmen	x 🕥			
VETS - Chapt	er 31	04/26/11	06/01/11	Enrollment in Error				
File Locatio	n		A	Archive Comments				
							Save	X Cancel

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.

a Capture Employment ONET								
Select an ONET for this Closure								
P-ONET from this Employment Plan								
29-2061.00 - Licensed Practical and Lic								
ONETs of previously closed Enrollments								
L19-3091.00 - Anthropologists and Arche								
-ONETs of recorded Job Placements								
41-2031.00 - Retail Salespersons								
-27-2011.00 - Actors								
–51-9021.00 - Crushing, Grinding, and P								
-19-4011.00 - Agricultural and Food Scie								
-35-3011.00 - Bartenders								
Employment Start Date: 04/10/09								
🆉 Save 🛛 🛱 🔁 All ONETs								

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 (Se	eker) Placement for PEDRINA S MESSINGAROUND (0000-00-	9999)	Sue Buth	er (406)44	4-2958				
Placement History									
Start Date	Employer Name	Salary	Interval	HredAlk	Job Order #				
Start Date		Salary	intervar	11157996	575471				
04/08	JIMS CONCRETE - THE ORIGINAL ONE	25.00	Hourly	40					
02/08	barnev's hurger 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					
Click on t	he + Add button.	- Delete							
🙀 Placement -									
• Employee	Name: Joe's Bar and Grill	Cont	act Joe Sin	kalowski					
		Contact Phone (405)444-2547							
Employer A	ddress: 222 W Broadway								
	HELENA MI (59601	Country:		*					
- Inactive	ite Seeker	Added To Work History							
Start D	ate: 04/09 + Hours Per Week: 40	Job Title Print On Resume							
Salary Inter	val Hourly Salary: 7.50	Laboration in the							
• 0*	ET 05301100 Bartenders	Job Description	on						
0.00					<u></u>				
Date Ente	с. <u>ру</u>								
	Save X Cancel 🔂 Close	End Date:	Mon	ths Worker	t 📃				

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 DDLIWSDMWorksWIOAHelp@mt.gov or email/call one of the WIOA staff.

Continue with 'WIOA Employment Plan Part 5.'