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	I	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.

rolment	Appropriatenes	s Employment Plan	Progress	Funding	Closures	Case Notes
Note	ot 🛛	Subject		Staff		
01/15/	13 WEX					🕂 Add
01/09/	13 Possible WEX					<u> </u>
11/26/	12 Job Search					- Delete
11/07/	12 Job Search					
10/23/	12 Update					
09/26/	12 Enrolment in WA-	Initial Case Note				
09/26/	12 Enrolment Date					
						Show all notes
ssess the dministrat or quite a auretta is	cted Lauretta about a opportunity as well. 1 ive. Lauretta continue while and would bene interested if it does n	possible Work Experier We received a job descr s to search for employm efit from recent work ex of inpact her Unemployr	ription and passe ent in her career perience and con	d it along to Lauretta. 1 field of counseling. Si fidence building, staff	The job is primarily ince she has been thought she woul	out of the job market d benefit from a WEX.
lext Cont	act 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 Navi	gation Options U	tility Reports <u>W</u> i	indow Help			
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🙀 Employment	Plan -					
Enrollment	Appropriateness	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.

Enrolment Appropria			T T		
	teness Em	ployment P	lan Progress Funding	Closures	Case Notes
Services					Show Closed Service
Service	Start	End	Outcome	Clo	sure Comments
Case Management	02/11/11	12/23/11	Completed		
Comprehensive Guidance a	nd 02/11/11	12/23/11	Completed		
Bigibility		08/30/11			
Nork Experience Including I			•		
Youth Individual Service Str		12/23/11	id not Complete		
Case Management	12/23/11				
Employment Plan Start End					
Start End	Reason		Plan Clos	e Comments	
Start End	Reason		Plan Clos	e Comments	
Start End Date Date	Reason		Plan Clos	e Comments	Chow Closed Envolve
Start End Date Date 22/11/11 Enrollments		d End			Show Closed Enrollm
Start End Date Date 22/11/11 Enrollments Program	Reason Sta				Show Closed Enrollmonments
Start End Date Date 02/11/11	Sta 12/23	3/11			

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 Emp	lovment Pla	n Progress	Funding	Closures	Case Notes	
Services						Show Closed	Services
Service	Start	End	Out	come		Closure Comments	
Case Management	02/11/11 1	2/23/11 Co	mpleted				
Comprehensive Guidance and	02/11/11 1	2/23/11 Co	mpleted				
Eligibility	02/11/11 0	8/30/11 Co	mpleted	-			
Work Experience Including Inte	02/11/11 1	2/23/11 Co	mpleted				
Youth Individual Service Strate	02/11/11 1	2/23/11 Di	I not Complete				
Case Management	12/23/11						
Employment Plan Start End Date Date Re 02/11/11	ason		3	Plan C	lose Comments		
- Enrolments						Show Closed I	Enroliments
Program	Start	End	Outo	come		Comments	
MA Youth Follow-Up	12/23/	11		2			4
WIA Youth - Local	02/11/	11 12/23/1	Family Care				-
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.

Enrollment	Appropriaten	ess Er	nployment	Plan Progress	Funding	Closures	Case Notes	
Services							Show Cl	osed Services
Ser	vice	Start	End	0.	utcome		Closure Comments	:
GED/HS Diplom	ia	12/06/11	12/06/11	GED obtained				
lousing		02/09/12	03/07/12	Completed				
ndividual Empl	oyment Plan	05/17/12	01/24/13	Completed				
ndividual Empl	oyment Plan	12/06/11	05/17/12	Completed				
nformation on	Supportive & Fo	11/29/11	12/06/11	Completed				
internation on	Supportive and	1 Tractor 1 T	12/00/11	Compress				
	Skills Training Plan d	12/06/11		Occupational Skills Ce		yay!!		
Employment I Start En Date Da	Skills Training Plan d					yay!!		
Employment I Start En Date Da	Skills Training Plan d	12/06/11				4.4-	Show Cl	osed Forolineo
Occupational S Employment I Start En Date Da 11/29/11	Skills Training Plan d	12/06/11	[12/06/11]	Occupational Skills Ce		4.4-	Show Cl Comments	nsert Forolimen
Occupational S Employment I Start En Date Da 11/29/11	Skills Training Plan d te Re	12/06/11 ason	12/06/11	Occupational Skills Ce	Plan	4.4-		osed Forolimen
Occupational S Employment I Start En Date Da 11/29/11 Enrollments Pr	Skills Training Plan d te Re ogram cogram	12/06/11 ison 05/2 05/2	art En/ 7/11 10/07 7/11 07/07	Occupational Skills Ce d Ou /11 Obtained Employm /11 Obtained Employm	Plan tcome nent	4.4-		nsed Fornimen
Decupational S Employment I Start Eni Date Dai 11/29/11 Enrollments Pr MA Aduit - Lo	Skills Training Plan d te Re rogram cal i Work - Local	12/06/11 ison 05/2 05/2	art En/ 7/11 10/07 7/11 07/07	Occupational Skills Ce	Plan tcome nent	4.4-		ased Foroimen

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.

🙀 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
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:

	<u>_</u>				
Start Date	Employer Name	Salary	Interval	HrsAVk	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]		/ ~~~~~
k on t	🗃 Job Order 🔶 Add	- Delete			
k on ti	,	- Delete			
acement-	he Add button.			almanti	
acement-	,	Corr	tact Joe Sink		
ecement-	he Add button.	Corr	tact Joe Sink (406)444		
ecement-	Name Joe's Bar and Grill	Contact Ph		1-2547	
ecement-	he Add button.	Corr			
acement -	Name Joe's Bar and Grill	Contact Ph Country:		⊷2547 ↓	
acement- • Employer Employer Ad	he Add button.	Contact Ph Country:	one: (406)444	⊷2547 ↓	Print On Resur
ecement - • Employer An Employer An Inactive • Start D	he Add button.	Contact Ph Country:	one: (406)444	⊷2547 ↓	Print On Resur
employer Ad acement - Employer Ad Inactive • Start D Salary Inter	he Add button.	Contact Ph Country:	one: (406)444 Work History	⊷2547 ↓	Print On Resur
employer Ad acement - Employer Ad Inactive • Start D Salary Inter	he Add button.	Contact Ph Contact Ph Country: Added To + Job Title	one: (406)444 Work History	⊷2547 ↓	Print On Resur

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.'