WIOA Eligibility: Entering Eligible Enrollments

Application:

An Application is required for new participants who will be enrolled in WIOA programs. In order to co-enroll an existing participant in a different program, you are required to create a new application if it has been more than 45 days since

an application was entered in the system. Click on the Eligibility icon $ on the toolbar to get to the Application tab. All items on the Application must be completed.

To keep the application you created, double-click in the Completed Date box and save today's date. A message will pop up saying that the Application will be frozen. Check to ensure that data is correct. Then click OK. Freezing prevents changes to the Application record.

If there are mistakes on the Application after freezing it, recreate a new Application record by clicking on the Options dropdown menu.

Choose Copy Application.
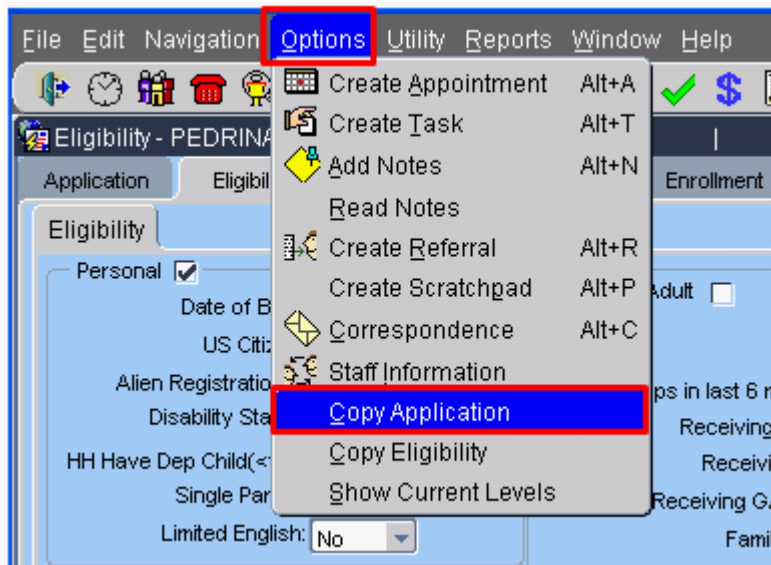
This will make a copy of the latest Application. Correct the fields and save.

Eligibility:

An Eligibility record is required for new applicants who will be enrolled in WIOA programs. The participant can be enrolled in more than one program on the initial Eligibility record.

Existing participants may need to be co-enrolled in a different program at a later date, so a new Eligibility record must be created for them as well.

An Application record must be created prior to creation of an Eligibility record. The Eligibility record must be added within 45 days of the Application Completed Date. If not added within 45 days, a new Application must be created before an Eligibility record can be added.

Most fields on the Eligibility tab are automatically filled with data entered in prior screens. Complete any fields that are not populated. Please check the data to ensure it is correct.

If your participant is a Youth, click the [Barriers] button.

There are two types of eligibility for Youth participants: Low Income and the 5% Window. Each has its own tab.

The first tab is Low Income, where low income status would be documented with an acceptable source.

Participants can be determined eligible under Low Income three different ways:

1. Select a low income barrier on the left side of the screen; or

2. Select the 6th Barrier's "Youth who require additional assistance to complete an education program" on the right side of the screen, PLUS choosing at least one of the Characteristics on the right side of the screen; or

3. Select the 6th Barrier's "Youth who require additional assistance to secure and hold employment" on the right side of the screen, PLUS at least one Characteristic also on the right side of the screen.

The second tab is the 5% window. Five percent (5%) of the local area (BOS or CEP) enrollments can be served under the Youth program even if their income is above low income guidelines. **Prior approval from the Youth program manager is required to use 5% eligibility.**

Participants can be determined eligible under the 5% Window three different ways:

1. Select a 5% barrier on the left side of the screen; or

2. Select the 6th Barrier's "Youth who require additional assistance to complete an education program" on the right side of the screen, PLUS choosing at least one of the Characteristics on the right side of the screen; or

3. Select the 6th Barrier's "Youth who require additional assistance to secure and hold employment" on the right side of the screen, PLUS at least one Characteristic also on the right side of the screen.

Income Button:

If a participant is on any type of public assistance, they are considered low income and there is no need to select the Income button and complete the WIOA Family Income Worksheet.

For Dislocated Workers, click on the Income button. Enter the month and year in the Last Month field. Click Save and then Close. There is no income verification requirement for Dislocated Workers.

For other participants having income that needs to be verified, click on the Income button. Enter the month and year in the Last Month field. Click on the

Copy button and the 1st through 5th month fields will be automatically filled in. Double-click on the Income Type field and choose the appropriate income type. Type a description. Enter an amount. More than one Income Type may be chosen if appropriate. Then Save and Close.

The participant will be marked Low Income on the Eligibility tab if indicated by data entered in the Income section.

When the Eligibility tab has been completed, click on the Check Verification button ✔ Check Verification on the Eligibility tab to verify that appropriate documentation is in the participant's file.

On the | General | tab, check the applicable fields showing that you have appropriate documentation for the items. Remember to place the documentation in the participant's hard file.

If the participant is a Youth, click on the | Youth | tab and check the applicable fields showing that you have appropriate documentation for the items. Remember to place the documentation in the participant's hard file.

Then Save and Close.

On the Eligibility Tab, the eligible program enrollments will be highlighted in green and checked. If the enrollment is not highlighted in green and checked, ensure that the Eligibility tab is complete and appropriate Check Verification items have been checked.

Freeze the Eligibility record by double-clicking in the ⬛ box and choosing today's date. You will receive a warning that the record will be frozen. Click OK to continue **IF** the program you expect to enroll your participant in is shown as an eligible program. This will freeze the record which will prohibit any changes being made to the record.

There is a Print ⬛ button on the lower right hand side of the Eligibility screen. This allows you to print a hardcopy of the Participation Record which contains Eligibility, Closures, Case Note, Services, and Follow-Up information.

This is an example of the beginning of the report:

WIA Participation Record

04/07/2009 08:02

Last Name: MESSINGAROUND	**Social Sec No:** XXX-XX-9999	**Office:** jpierce@mt.gov
First Name: PEDRINA S	**Home Phone:** (406)444-4444	**Email:** jpierce@mt.gov
Street Addr: 1221 MESSINGAROUND LANE R	**Contact Phone:** 1231231234	**Contact2 Phone:** 2342342345
City,State: POLSON,MT 59860	**Contact Name:** Really	**Contact2 Name:** Kinda
County: LAKE	**Relationship:** brother	**Relationship:** sister

Date of Birth:	06/03/1942 **Age** 66	**Displ Homemaker:**	No
Hispanic/Latino:	N-No	**Runaway Youth:**	
Race:	Unknown	**Lack Work History:**	
Gender:	Male	**Preg/Parent Yth:**	
Citizen Status:	Yes	**Unemployment Ins:**	Claimant not Referred by WPRS
Education Status:	Not Attending School or H.S. Dropout	**Pre Labor Force:**	Not Employed
Last Grade Completed	11	**27) Pre Prg/Disl. Wage:**	??
Basic Skill Deficient:		**28) Pre Program Employer:**	??
Family Size:	7	**Layoff Date:**	02/14/2009
Dependents<18:	Yes	**Economic Factors:**	
Single Parent:	Yes	TANF: No	FoodStamps: No
Selective Services:		SSI/SSDI: No	Foster Child:
Veteran Status:	V - Regular	GA/RA/SSI No	Homeless: No
Campaign Veteran:	No		Low Income: Yes
Disabled Veteran:	No		5% Window: No

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 1.'