WIOA SCHEDULER:

Several changes have been made to the Scheduler 💮 since we started using the new MontanaWorks. We strongly encourage you to use the Scheduler as a tool to manage some of your work.

The Scheduler has been enhanced to provide several tasks that are important for WIOA case managers to review. Four types of tasks require some kind of action:

1. The Scheduler will let you know when a customer has been exited from WIOA programs. In this case, you will get a message that states, "Customer has exited training program due to a 90 day gap in service."

😨 Schedule					
Daily Schedule Weekly Schedule Team Schedule	Inbox	Groups	Query		
< < Today > >> Tuesday April 7, 2009			Tasks		
A co	Show Types:		📃 🗌 Comple	eted Tasks 🛛 🗌 Nev	v Tasks Only
AM 30	Type P	Name		Description	
9 00			J Customer has e	xited a training progr	am due to a 9
AM 30			Mailing address	for Case Managed s	eeker 517177
AM 30	Eollowup B		6 Client Visit		
11 00	Note Add		Seeker 4919810	084 STEVENS, REBE	CAL has a r
AM 30			Seeker changed	d their info on Self-Se	ervice Montan
PM 30					
1 00					.
PM 30 2 00	Description: Custon	her has exited a train	ing program due to a	a 90 day gap in se	Completed 🛄
PM 30	Priority: B	Date: 11/27/07	Goal Date:	Completed:	
3 00	SSN:				Phone 👲
4 00	Comments:				
PM 30					
5 00			—		•
			Make Appt	Notation	🚽 Add Task
1 2 3 4 5 6 7 8 9 10 11 3 4 5 6 7 8 9		? Help	🔗 Save	X Cancel	🗕 Del Task
12 13 14 15 16 17 18 10 11 12 13 14 15 16 10 20 21 22 23 24 25 26 27 28 29 30 24 25 26 27 28 29 30	+ Appointment	🧉 Daily Sched.	🧉 Weekly		

When you get this task, it's important to check the participant's record to ensure that the participant should be exited.

It is also important to complete any exit information that appear with this task.

If you click on **Help** when this task is highlighted, the following note appears:

현 т	ASK_HELP		
	A countable service has not been entered on an enrollment within 90 days. Exit information is required. Click on the folder in the top right hand corner to access the exit question(s).		
		10000	
	Glose		

To access the exit questions, click on the folder as shown below:



The following form will appear. Complete the Exit Task form, Save, and Close.

🧟 Exit Task	
Name:	Exit Date: 01/10/07
Enrollment:	MA Youth - Local
l 🛛	MA Youth - Local
ſ	Phone numbers
ŀ	
	Work:
Email:	
W I	/hat is the customer's status?
L L	
Ŵ	hat is the customer's education status at exit?
l I	n School - Alternative School 📃 📃
A	s of today, what degree or certificates have the customer attained?
L	*
	🏈 Save 🗙 Cancel 🔂 Close

It is particularly important to complete this information for Youth participants. There is exit information for Youth that is only captured through the Task functions of the Scheduler.

2. The Scheduler will let you know when a customer is due for WIOA Quarterly Follow-up contacts.



For Youth participants, you will get a message in the Comments section that reads:

Contact youth to ascertain their status and to determine if they need additional assistance. Please document information in Notes under "Youth Follow-Up".

There will be a task for follow-up for <u>all</u> Youth participants.

For Adult and Dislocated Worker participants, there will be a follow-up task only for those participants exited to employment.

3. The Scheduler will let you know when Youth Retention information is due. This is information about whether the participant is employed or in postsecondary education during the third quarter after exit. You will get a message in the Comments section that reads:

Contact youth to obtain retention information and close out WIOA Youth Retention enrollment with most appropriate listed reason. Note that this information may be gathered anytime during third quarter after exit. Please document information in Notes under "Youth Follow-Up".

🩀 Schedule					
Daily Schedule Veekly Schedule	Team Schedule	Inbox	Groups	Query	
< Today >>> Tuesday	April 7, 2009	Tasks			
9.00	Multi	Show Types:		📃 📃 Comple	eted Tasks 🛛 🗌 New Tasks Only
AM 30		Type P	Name		Description
9 00				MA Youth Qua	rteriy Follow-Lin
AM 30				WA Youth Bate	ation Information
10 00		WIAFUL A		WIA YOUIN REE	
11 00				VMA Youth Rete	ention Information
AM 30		WIAFOL A	J.	WIA Youth Fina	il Follow-Up
12 00		WAFOL A	I	VMA Youth Rete	ention Information
PM 30					
1 00		Descriptions (1010.2)			
PM 30 2 00		Description: WIA Y	outh Retention Inform	nation	
PM 30		Priority: A	Date: 07/01/08	Goal Date:	Completed:
3 00		SSN			Phone 🔨
PM 30		Commenter			
4 00		Contrients. Contai	ct youth to obtain rete	ention information an	d close out WIA Youth Retention
FM 50		enrolin	nent with most appro	priate listed reason.	Note that this information may be 🔄
April 2009 SM TW TFS SM T 5.6 7 8,910 11 3.4 4	ay 2009 ГWTFS 5 6 7 8 9		? Help	🚾 Make Appt	Notation + Add Task Cancel - Del Task
	2 13 14 15 16				
26 27 28 29 30 21 22 23 24 25 24 24 25 26 31	5 27 28 29 30	🕂 Appointment	🧉 Daily Sched.	🧉 Weekly	

4. The Scheduler will let you know when a Youth participant needs to have a pretest or posttest completed and entered in MontanaWorks.

The messages are as follows:

Pretest Missing: If the Youth participant has not had a pretest within six months prior to the first youth service OR 60 days after the first youth service, the Scheduler will give you a task to conduct a pretest. This message states, **"Math or Reading or Math and Reading (depending on the test that is missing) Pretest should to be taken by [date the test is due]."** The message will appear on the Scheduler periodically until the pretest is entered in MontanaWorks.

Posttest Needed: If the Youth participant is found to be basic skills deficient using the pretest data, the Scheduler will give you a task to conduct a posttest. This message states, **"Math or Reading or Math and Reading** (depending on the test that is missing) Posttest should to be taken by [date the test is due]." The message will appear on the Scheduler periodically until the posttest is entered in MontanaWorks.

If the Youth participant is still basic skills deficient after a posttest, the Scheduler will give you a task again to conduct a posttest within a year from the first Youth service date. This message states, **"Math or Reading or Math and Reading (depending on the test that is missing) Posttest should to be taken by [date the test is due]."** The message will appear on the Scheduler periodically until the posttest is entered in MontanaWorks.

\odot	Scheduler Hint:	Overdue tasks appear in red.
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				Tasks
Sho	ow Types:			Completed Tasks 🗌 New Tasks Only
	Туре	P	Name	Description
	WIAFOL	A		WIA Youth Quarterly Follow-Up
	WAFOL	A		WIA Youth Quarterly Follow-Up
	WAFOL	A		WIA Youth Quarterly Follow-Up

 \bigcirc Scheduler Hint: To delete tasks, click on the \Box box in front of the task.

Tasks					
Shov	v Types:			Completed Tasks 🗌 New Tasks Only	
	Туре	Ρ	Name	Description	
	MEX90	в		Customer has exited a training program due to a 9	