Customer Assessment and Eligibility Verification for Apprenticeship Illinois

Contents

Purpose

The intake process uses system generated recommendations in combination with a career planner review to ensure customers are suitable for a program. This process includes three main steps:

1. Customer completes the online intake form. Illinois workNet system uses the submitted forms to organize customers by grantee, generate program recommendations, and populate initial assessment results.
2. Staff completes the intake review by:
   a. Reviewing the customer's responses related to employment goals and baseline questions.
   b. Comparing their responses to the training program baseline requirements; and
   c. Discussing the results and options with the customer to identify a good customer-to-program match.
   d. Reviewing eligibility requirements and collecting the appropriate documentation.
   e. Updating the eligibility status field to:
      i. Enrolled, or
      ii. Identify the reason why the customer is not going participate and to document recommended next steps or referrals.
3. Grantee staff contact LWIA staff about interested and eligible customers to complete enrollment into WIOA.
4. LWIA staff will complete the IWDS application and verify supporting eligibility documentation if the customer is enrolled into WIOA.

Who Enters/Maintains Data

Customers complete the intake form. Once submitted, the customer cannot update the information.

Intermediary – Intermediaries or Navigators - can update their customer's online intake form based on their conversation with the customer. Updates can be made to the intake form up to the point where the customer is enrolled in the Illinois workNet system. At that point, the intake form is locked.

Intermediary accesses the customer's intake review page to discuss recommended programs, identify required eligibility documentation, and update eligibility status information.
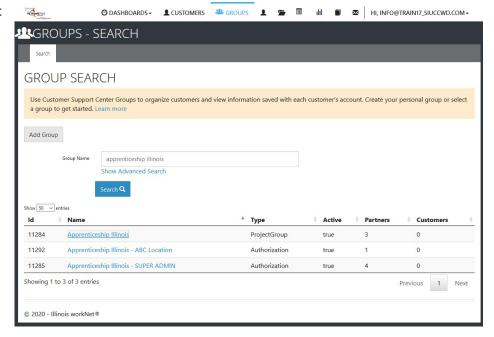
How Customers Access the Apprenticeship Illinois Online Intake Form

1. Customers are added on the group page. They are either sent a link to access the application or the customer will complete the application with the agency representative.
2. Customers login with their existing Illinois workNet account. If they do not have an Illinois workNet account, they must setup an account.
3. Agree to the Terms of Use and complete the Application.
    a. Goals and situations.
    b. Training programs options.
    c. Submit application at the end.
4. Customers must complete the application.

How Provider Staff Confirm Eligibility

1. Access www.IllinoisworkNet.com
2. Log into your account.
3. Access My Dashboard.
4. Access Customer Groups or click here https://illinoisworknet.com/siteadministration/Groups/Default
5. Click **Groups** > Search **Apprenticeship Illinois**
6. Select top group labeled Project Group.
7. Search customer name from list.

GROUPS - SEARCH

GROUP SEARCH

Use Customer Support Center Groups to organize customers and view information saved with each customer's account. Create your personal group or select a group to get started. Learn more

Add Group

Group Name: apprenticeship illinois

Show Advanced Search

Search

Show 50 entries

Id	Name	Type	Active	Partners	Customers
11284	Apprenticeship Illinois	ProjectGroup	true	3	0
11292	Apprenticeship Illinois - ABC Location	Authorization	true	1	0
11285	Apprenticeship Illinois - SUPER ADMIN	Authorization	true	4	0

Showing 1 to 3 of 3 entries   Previous 1 Next

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8. Click on **Last Name** to open file.

9. Click on **2. Verify eligibility and enroll the customer.** You can review the initial assessment before beginning the eligibility review by opening step *1. Customer submits initial online assessment.*

10. Click on **Complete Program Eligibility.**

2. Verify eligibility and enroll the customer

Complete Program Eligibility

Customer Type:
N/A

Enrollment Status

Not Enrolled - Eligibility Not Complete

Save

11. New screen opens – click on **Start Eligibility Determination.**

DASHBOARDS • GROUPS • | HI, INFO@TRAIN10_SIUCCWD.COM •

ELIGIBILITY DETERMINATION FOR DAVID KRUSE

Basic Info   Education   Physical   Financial   Employment   Other

1. Print the folder organizer sheets to help you keep the customer file neat, organized, and consistent with other participant folders.

2. Go through program eligibility tabs and select the documentation type that was collected to verify eligibility.
   • Include the appropriate documentation in the customer's folder.
   • If you identify additional situations that impact program eligibility and were not included in the initial assessments, identify the documentation type and collect the documentation for the folder.
   • If possible, it is encouraged to collect documentation for all situations identified.
   • However, the customer's services should not be delayed if you can demonstrate the customer is WIOA eligible.

David Kruse identified the following items in the initial assessment on 5/22/2020 that impact WIOA eligibility.
   Address: 791 791st st. Chicago, IL 60606
   Date of Birth: 1/1/2002
   SSN: xxx-xx-1791
   Gender at Birth: Male
   Are you authorized to work in the US? Yes
   Registered with Selective Service: No

Start Eligibility Determination

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12. Verify each item of the application that was entered or checked by the applicant. *Checked items require verification type before being able to certify eligibility*.

    a. Click on the drop-down arrow to see the various methods of verification.

    b. Confirm Social Security Number by typing it in the box.

    c. If a male participant, confirm Selective Service Registration if over 18 years of age. If participant needs to register, click the link by that section.

13. Click **Save and Go to Next Tab** OR **Save and Return Later**. *If nothing is marked on a page, Click Save and Go to Next Tab*.

See Appendix A at the end of the document for Acceptable Verification Documents.

ELIGIBILITY DETERMINATION FOR DAVID KRUSE

Basic Info | Education | Physical | Financial | Employment | Other

If a question is not answered correctly or cannot be verified, the application can be updated. Once the application is updated, this page can be refreshed to see the updated answers. **Update Application**

Intial Assessment Submit Date: 5/22/2020
Name: David Kruse

Select Verification Type ▾ | **Address:** 791 791st st. Chicago, IL 60606
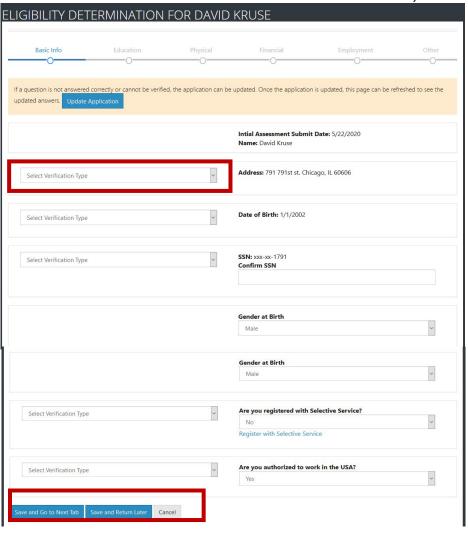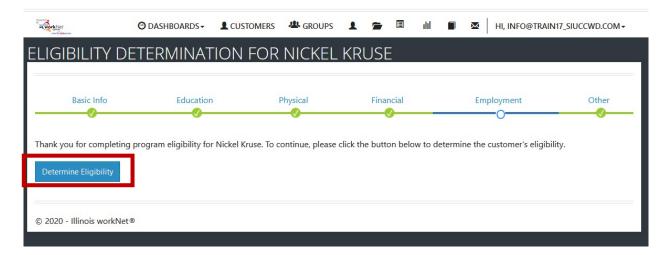
Select Verification Type ▾ | **Date of Birth:** 1/1/2002

Select Verification Type ▾ | **SSN:** xxx-xx-1791
Confirm SSN

Gender at Birth
Male ▾

Gender at Birth
Male ▾

Select Verification Type ▾ | **Are you registered with Selective Service?**
No ▾
Register with Selective Service

Select Verification Type ▾ | **Are you authorized to work in the USA?**
Yes ▾

Save and Go to Next Tab | Save and Return Later | Cancel

14. Once all items have been verified, a new modal window will open. Click **Determine Eligibility.**

⏱ DASHBOARDS ▾ | 👤 CUSTOMERS | 👥 GROUPS | 👤 📁 📄 📊 📋 ✉ | HI, INFO@TRAIN17_SIUCCWD.COM ▾

ELIGIBILITY DETERMINATION FOR NICKEL KRUSE

Basic Info ✓ — Education ✓ — Physical ✓ — Financial ✓ — Employment ○ — Other ✓

Thank you for completing program eligibility for Nickel Kruse. To continue, please click the button below to determine the customer's eligibility.

Determine Eligibility

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The next screen will indicate for which program(s) eligibility was determined. Click **Return to Intake Review.**

15. Application returns to **Section 2. Verify Eligibility and Enroll the customer**.
    a. To review the eligibility that was entered, click the words for each section.
    b. Edits can be made prior to customer enrollment being selected.
16. Eligibility Verification designates time, date, and who completed the enrollment action.
    a. Click View - Modal opens.
    b. Review information.
    c. Print Folder Organizer Sheets in step 1.
    d. Click Print Eligibility with Signature Lines.
    e. Document opens.
    f. Obtain customer signature and date, case manager signs and dates.
    g. Close modal.

Services cannot begin until this form is completed.

17. <mark>Check</mark> box indicating signatures have been <mark>obtained</mark> if customer is eligible for a WIOA co-enrollment.
    a. Select program enrollment.
    b. Select enrollment status.
    c. Upload signed copy of elgibility form to customer uploads tab.

1. Customer submits initial online assessment

2. Verify eligibility and enroll the customer

Get new image

☑ View Eligibility Verification Saved 5/22/20...

Select Customer Type:
○ Adult
○ Out of School Youth

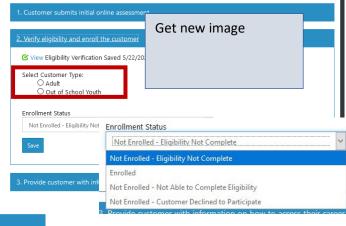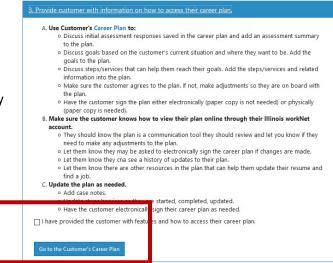Enrollment Status
Not Enrolled - Eligibility Not

Enrollment Status

Not Enrolled - Eligibility Not Complete ▾

Not Enrolled - Eligibility Not Complete

Enrolled

Not Enrolled - Not Able to Complete Eligibility

Not Enrolled - Customer Declined to Participate

3. Provide customer with inf...

Save

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2. Verify eligibility and enroll the customer

☑ View Eligibility Verification Saved 6/3/2020 12:01 ⬅ This form must be signed and dated on or before customer can be enrolled in services.

So the enrolled block cannot be clicked before the form is signed and dated with the certification date.

Select Customer Type:
○ Adult
○ Out of School Youth

Form can be electronically signed.

☐ Checkbox with latest date forms signed by client and agency, if signed

Enrollment Status
Not Enrolled - Eligibility Not Complete ▾

Save

Get new image

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18. **Step 3. Provide customer with information on how to access their career plan.**

Follow directions to create a Career Plan for the customer by following the directions in the Career Plan Overview.

3. Provide customer with information on how to access their career plan.

A. **Use Customer's Career Plan to:**
   ○ Discuss initial assessment responses saved in the career plan and add an assessment summary to the plan.
   ○ Discuss goals based on the customer's current situation and where they want to be. Add the goals to the plan.
   ○ Discuss steps/services that can help them reach their goals. Add the steps/services and related information into the plan.
   ○ Make sure the customer agrees to the plan. If not, make adjustments so they are on board with the plan.
   ○ Have the customer sign the plan either electronically (paper copy is not needed) or physically (paper copy is needed).
B. **Make sure the customer knows how to view their plan online through their Illinois workNet account.**
   ○ They should know the plan is a communication tool they should review and let you know if they need to make any adjustments to the plan.
   ○ Let them know they may be asked to electronically sign the career plan if changes are made.
   ○ Let them know they cna see a history of updates to their plan.
   ○ Let them know there are other resources in the plan that can help them update their resume and find a job.
C. **Update the plan as needed.**
   ○ Add case notes.
   ○ Update steps/services as they are started, completed, updated.
   ○ Have the customer electronically sign their career plan as needed.

☐ I have provided the customer with features and how to access their career plan.

Go to the Customer's Career Plan

If you are going to co-enroll a participant into WIOA Title 1 but do not need to immediately provide service through WIOA follow this process:

- *Add the customer into IWDS with a Career Planning (Case Management) service - a same day service.*
- *Return to the IWDS case file every 90 days to keep it active.*
- *Add an additional episode in that record indicating customer activity and they are still being fully case managed through IL workNet for Apprenticeship Illinois.*

Customer Overview Page

The overview page is a quick glance resource of tasks that have been or need to be completed for a customer.

Service Integration Resource Team

Add any team members that will need access to this customer file.

Intake Review

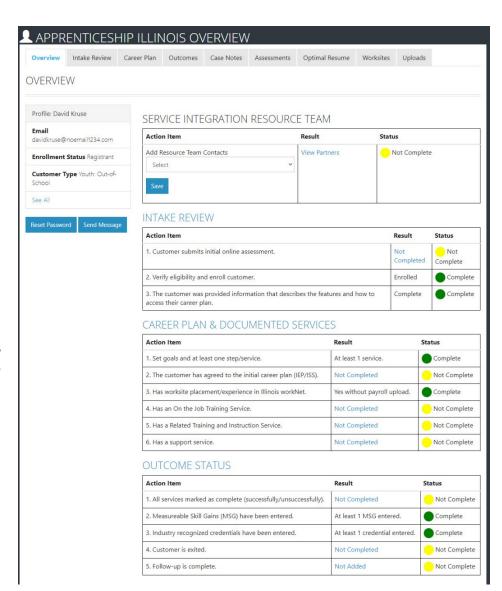As items are completed, a green circle with Completed will be visible.
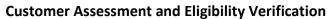
If items are past due, a red circle will be visible.

Career Plan & Documented Services

This section tracks the items related to the customer's career plan and worksite placement.

Outcome Status

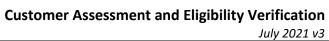This section tracks customer performance for a variety of services.

APPRENTICESHIP ILLINOIS OVERVIEW

Overview | Intake Review | Career Plan | Outcomes | Case Notes | Assessments | Optimal Resume | Worksites | Uploads

OVERVIEW

Profile: David Kruse

Email
davidkruse@noemail1234.com

Enrollment Status Registrant

Customer Type Youth: Out-of-School

See All

Reset Password | Send Message

SERVICE INTEGRATION RESOURCE TEAM

Action Item	Result	Status
Add Resource Team Contacts Select Save	View Partners	🟡 Not Complete

INTAKE REVIEW

Action Item	Result	Status
1. Customer submits initial online assessment.	Not Completed	🟡 Not Complete
2. Verify eligibility and enroll customer.	Enrolled	🟢 Complete
3. The customer was provided information that describes the features and how to access their career plan.	Complete	🟢 Complete

CAREER PLAN & DOCUMENTED SERVICES

Action Item	Result	Status
1. Set goals and at least one step/service.	At least 1 service.	🟢 Complete
2. The customer has agreed to the initial career plan (IEP/ISS).	Not Completed	🟡 Not Complete
3. Has worksite placement/experience in Illinois workNet.	Yes without payroll upload.	🟢 Complete
4. Has an On the Job Training Service.	Not Completed	🟡 Not Complete
5. Has a Related Training and Instruction Service.	Not Completed	🟡 Not Complete
6. Has a support service.	Not Completed	🟡 Not Complete

OUTCOME STATUS

Action Item	Result	Status
1. All services marked as complete (successfully/unsuccessfully).	Not Completed	🟡 Not Complete
2. Measureable Skill Gains (MSG) have been entered.	At least 1 MSG entered.	🟢 Complete
3. Industry recognized credentials have been entered.	At least 1 credential entered.	🟢 Complete
4. Customer is exited.	Not Completed	🟡 Not Complete
5. Follow-up is complete.	Not Added	🟡 Not Complete

Appendix A - Acceptable Verification Documents

Address	- Applicant statement/self-attestation, in limited cases - Current Utility Bill w/Customer's Name - Driver's License/State I.D. - Food Stamp Award Letter - Homeless-DHS Letter - Homeless-Shelter/Temp Residence Letter (on Letterhead) - Housing Authority Verification - Insurance Policy (Residence or Auto) - Landlord Statement or Lease - Letter from Social Service Agency or School (on Letterhead) - Medicaid/Medicare Card - Other, Requires Partnership approval - Pay Stub - Public Assistance Records (current)
Date of Birth	- Acceptable Documents for INS form I-9 - Baptismal Certificate with Date of Birth - Birth Certificate - Court Records (showing DOB) - DD-214/Report of Transfer or Discharge with DOB - Driver's License - Hospital Birth Record - IDES UI printout (showing DOB) - IL State ID or other Federal, State or Local Gov't issued ID - Passport - Public Assistance/Social Service records - School Records/Identification - Workers Compensation Record with DOB - Youth Only-Work Permits
Social Security Number	- Any other approved Social Security Document - Social Security Printout - Social Security Card (Must be signed)
Registered with Selective Service if Male	- Locally Approved Selective Service Waiver - Selective Service Registration Card - Selective Service Registration Record (form 3A) - Selective Service Verification (www.sss.gov printout) - Stamped Post Office Receipt of Registration - Veteran's ID Card
Authorized to work In the United States	- Acceptable Documents for INS form I-9 - Alien Registration card (Right-to-Work) - Baptismal Certificate with place of birth - Birth Certificate with place of birth - Certificate of U.S. Citizenship (INS Form N-560 or N-561) - Certification of Birth Abroad issued by the Dept. of State (Form FS-545 or Form DS-1350) - Consular Report of Birth Abroad or Certificate of Birth - DD-214/Report of Transfer or Discharge - E-Verify with documentation - Foreign Passport stamped Eligible to work - Hospital Birth Record indicating US Citizenship - ID card for use of Resident Citizen in the U.S. (INS Form I-179) - IDES or other State's UI (UI Claimant only)

	• Permanent Resident Card or Alien Registration Receipt Card with photograph (INS Form I-151 or I-551) • Self-Attestation on How to Meet DACA requirements outlined in DOL TEGL 02-14 • U.S. Naturalization Certificate • U.S. Social Security card (work eligible) • Unexpired Employment Authorization Document (INS Form I-688A or I-688B) with or without photograph • Unexpired Foreign Passport, with I-551 stamp or attached INS Form I-94 • Unexpired Reentry Permit (INS I-327) • Unexpired Refugee Travel Document (INS Form I-571) • Unexpired Temporary Resident Card (INS Form I-688) • United States Passport
In School	• Verification of Enrollment from Educational Institution • WIOA Application (signed & dated)-Attending school
• Foster care • Aged out of foster care	• Court contract • Court documentation • Medical Card showing Foster Child • Verification of payments made on behalf of child • Written statement from State/Local agency
Hard time with reading, writing, or math	• Results from authorized assessment test • School Records verifying applicant unable to take assessment test
Hard time speaking English	• Case notes from Career Planner • Results from authorized assessment test • WIOA application (signed and dated)
Homeless	• Signed applicant statement • Written statement from an individual providing temporary assistance • Written statement from shelter • Written statement from Social Service agency-homeless shelter/runaway services
Legal	• Applicant statement/self-attestation, in limited cases • Court Documents • Halfway house resident • Letter from probation officer • Letter of parole • Police records
• Pregnant • Need help with childcare	• Case Notes regarding observable condition • Child's Birth certificate • Hospital record of birth • Medical Card • Physician's Statement • Public Assistance/Social Service records • Referral from official agencies • School program for pregnant teens • School Records • Signed applicant statement
Disability	• Case Notes regarding observable condition by Case Manager • Individual Education Plan from school • Letter from drug or alcohol rehabilitation agency • Medical Records • Physician's Statement • Psychiatrist or Psychologist Diagnosis • Rehabilitation evaluation records • School Records • Sheltered workshop certification • Social Security Administration Disability records

	• Social Service records/Referral • Veterans Administration Disability Determination letter/Records • Vocational Rehabilitation Letter • Worker's Compensation Record
Highschool Dropout	• Attendance Records • Dropout Letter • WIOA Application (signed and dated)-not attending School
Did not attend high school last quarter	• Attendance Records • Written verification from Educational Institution
• Need help to complete education or secure employment • Need help holding employment	Case Note
Laid off	• Dislocation Event Tracking System shows Laid off Due to Plant Closure • Dislocation Event Tracking System shows Laid Off Due to Substantial Layoff • Employer Information shows Laid Off Due to Plant Closure • Employer Information shows Laid Off Due to Substantial Layoff • IDES UI Record showing Termination or Layoff • Individual Notice of Layoff • Public Notice of Plant Closure w/in 180 days • Public Notice of Substantial Layoff w/in 180 days • Signed & Dated WIOA Application • UI Records • IDES UI Record showing Termination or Layoff • Work History showing Termination or Layoff
Unemployed 26 Weeks or more	• Completed Work History • UI Documents
Married service member	Signed & Dated WIOA Application
Supported by spouse	• Layoff notice/Business closure documentation • Records verifying death, divorce, or legal separation • Signed & Dated WIOA Application • Signed self-attestation of marital status
Receives SNAP	• Authorization to Obtain Food Stamps • Letter from Food Stamp Disbursing Agency • Public Assistance Records/Printout
• Receives Welfare • Receives TANF • Receives SSI	• Copy of Authorization to Receive Cash Public Assistance • Copy of Public Assistance Check • Public Assistance Identification showing Cash Grant Status • Public Assistance Records/Printout • Refugee Assistance Records
Receiving free lunch	Documentation from School
High poverty area	Documentation Verifying High Poverty Area
County	• Applicant Statement • Computer Printout from other Government Agencies • Driver's License • Food Stamp Aware Letter • Homeless • Housing Authority Verification • Illinois Secretary of State Issued State of Illinois Identification Card • Insurance Policy • Landlord Statement • Lease

	• Letter from Social Service Agency or School • Library Card • Medicaid/Medicare Card • Medical Card • Phone Directory • Postmarked Mail Addressed to Applicant • Property Tax Record • Public Assistance Records/Printout • Rent Receipt • Selective Service Registration Card • School Identification Card • Utility Bill • Work Experience Records/Pay Stub
Family Size	• Applicant Statement • Birth Certificate • Current Tax Return with IRS Documents • Decree of Court • Disabled • Divorce Decree • Landlord Statement • Lease • Marriage Certificate • Medical Card • Public Assistance/Social Service Records • Public Notice of Closing • Statement from Individual Providing Temporary Residence • Statement from Publicly Supported Facility or Institution
Family income	• Accountant Statement • Alimony Agreement • Applicant Statement • Award Letter from Veterans Administration • Bank Statements (Direct Deposit) • Compensation Award Letter • Court Award Letter • Employer Statement/Contact • Farm or Business Financial Records • Housing Authority Verification • Most Recent Tax Return Supported by IRS Documents • Pay Stub • Pension Statement • Public Assistance Records/Printout • Quarterly Estimated Tax for Self-Employed Persons • Social Security Benefits • Unemployment Insurance Documents and/or Printout
UI Benefits	• IDES UI Record showing Termination or Layoff • IDES UI Records showing Eligible for Benefits (Claimant or Exhaustee) • Other State's UI Records showing Eligible for Benefits (Claimant or Exhaustee) • UI Documents showing Unemployed at Least 6 months
Tenure	• IDES UI Records showing meets Tenure Requirements for WIOA (Neither Claimant nor Exhaustee) • Work History or other documentation of ONET OR NAICS Code for Dislocation Employment