



REMINDERS / PREP FOR DESK REVIEWS

Desk audits are not to “catch you”, but are to:

- Maintain compliance with DOL
- Make sure we are all on the same page
- Make sure you have a Program Plan to meet scopes
- Offer support or course revisions

THESE SLIDES ARE SOME NOTES ABOUT THE PROGRAMMATIC PIECES:

- **Many things the officers will review are what we look at during check-ins, and what you look at routinely**
- All numbers will be looked at in comparison to your Scope of Work #s



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General / non-service program tips:

- Have contract available for reference
- Have MOUs and subcontracts available
- Make sure marketing materials have the appropriate “branding”
- Fiscal team should be available and ready for discussion of policies and billing status / plans

NEXT: tips specific to program services



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Numbers from Dashboard / Julio Report compared to Scope of Work:

- Applicants.
- Active customers. **(Details on later slides)**
- # Enrolled in training.
- # Enrolled in Work-Based Learning.
- # Earned a Credential.
- # of Measurable Skills Gains.
- # Employed.
- # Exited.
- # of Followups.



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Also from Julio Report / Dashboard:

- Case Notes more than 30 days?
- Customers with no active services

MORE INFO ON Customers

- If low compared to your goals, have you communicated your plan to us / written it on monthly reports? (yes, you have!)
- Inactive: is there a case note or closeout?
- Incomplete applicants: is there a case note or closeout?



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Active / Exited customers

- Eligibility and Application.
 - Look for any points that don't have a green dot
 - **UPLOAD** eligibility documents
- Assessments.
 - Employment 101 and interests / Skills.
 - CASAS or TABE.
- Case Notes
 - Starting at the beginning, do they tell the story?
 - Do the subject lines indicate what the note is about?

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Active / Exited customers

- **SERVICE PLAN**
 - Common error: click the spot indicating customer knows how to obtain their service plan
 - One of the goals **MUST BE** related to **UNSUBSIDIZED EMPLOYMENT IN THE FIELD OF FOCUS**, or college.
 - Remember this is a workforce project
 - Remember, jobs or college are how we successfully close youth cases
 - Other goals can be about the training or credential, or about addressing a major barrier



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Active / Exited customers

- Services

- Is the training open
- Is the training closed if completed
- Is WBL open
- Is WBL closed if completed
- Are timesheets and attendance logs uploaded?
- Are there case notes with updates on these services
- Are other services you've done with the youth in there? **GIVE YOURSELVES CREDIT!**, and demonstrate what the youth has been doing

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Active / Exited customers

- Credentials
 - If they completed their training, enter the credential ! (and upload)
 - If they completed a part of their training that results in a certificate or credential, enter it! (and upload) Ex: Patient Care Tech is 3 certificates to obtain the full credential. Enter each one separately.
- MSG
 - Enter the significant progress
 - Enter re-tests for basic skills (hopefully there's been an improvement)
- Employment:
 - Enter UNSUBSIDIZED permanent employment. Can / should the youth be closed?

GENERAL CUSTOMER FLOW refer to the Partner Guide for official processes

Application

Assessments (ex: TABE/CASAS, required Illinois workNet assessments such as exploration, employment 101, etc.)

Enrollment based on eligibility (upload documents!)

SERVICE PLAN

(with at least one goal indicating goal for unsubsidized employment in the field of xx)

Services, which may include some of these:

- Work readiness group, TRAINING, WORK-BASED LEARNING, supportive services, etc.
- OPEN AND CLOSE THESE SERVICES as they happen, with case notes!

Along the way, be sure to:

- Case note
- Add MSG..... A second TABE/CASAS (if score goes up); progress report from training; progress report from work-based learning site.
- Upload credentials, proof of activities, etc
- Billing: work-based learning, supportive services expenses, etc.

POSTIVELY CLOSE a case when a customer has obtained verified unsubsidized employment

NEGATIVELY CLOSE a case when a customer drops out or goes missing.

FOLLOWUP monthly moving forward.

QUICK TIPS: TYPICAL CUSTOMER FLOW FOR FULL DESCRIPTIONS, REFER TO THE YCP PARTNER GUIDE

