

WIOA

Professional Development

american**job**center[®]

WIOA SERVICES MATRIX: TITLE IB ADULT AND DISLOCATED WORKER SERVICES

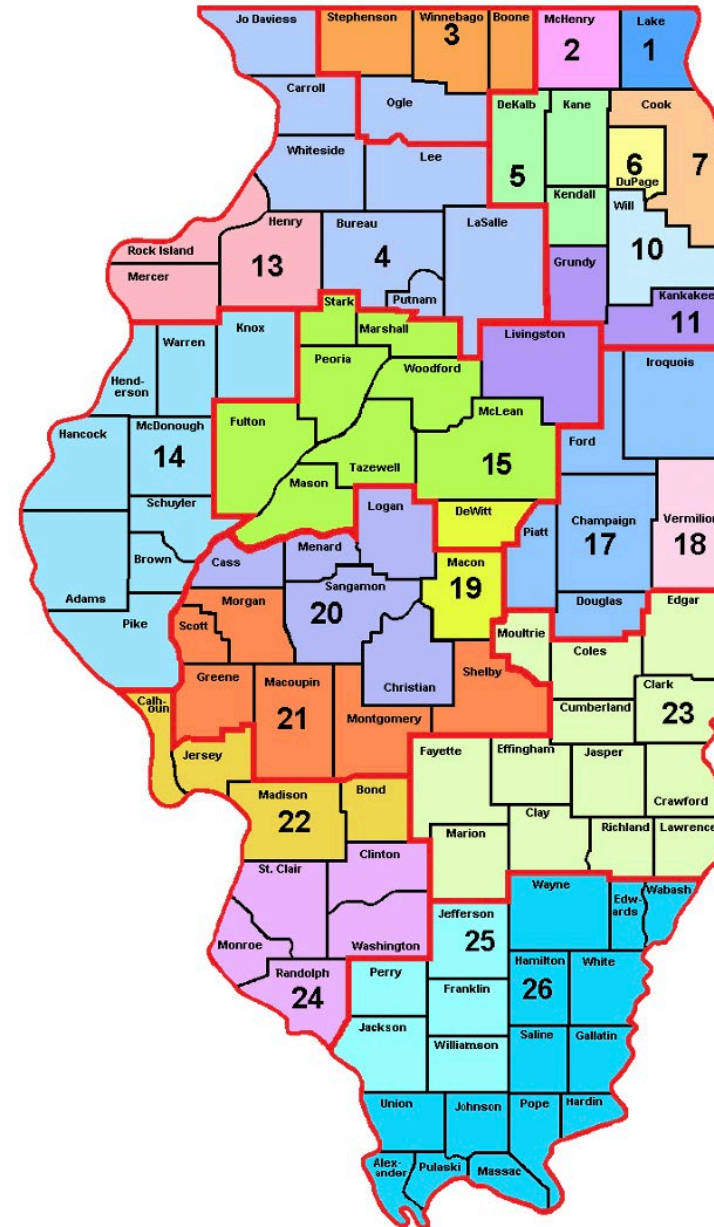
April 8th, 2025



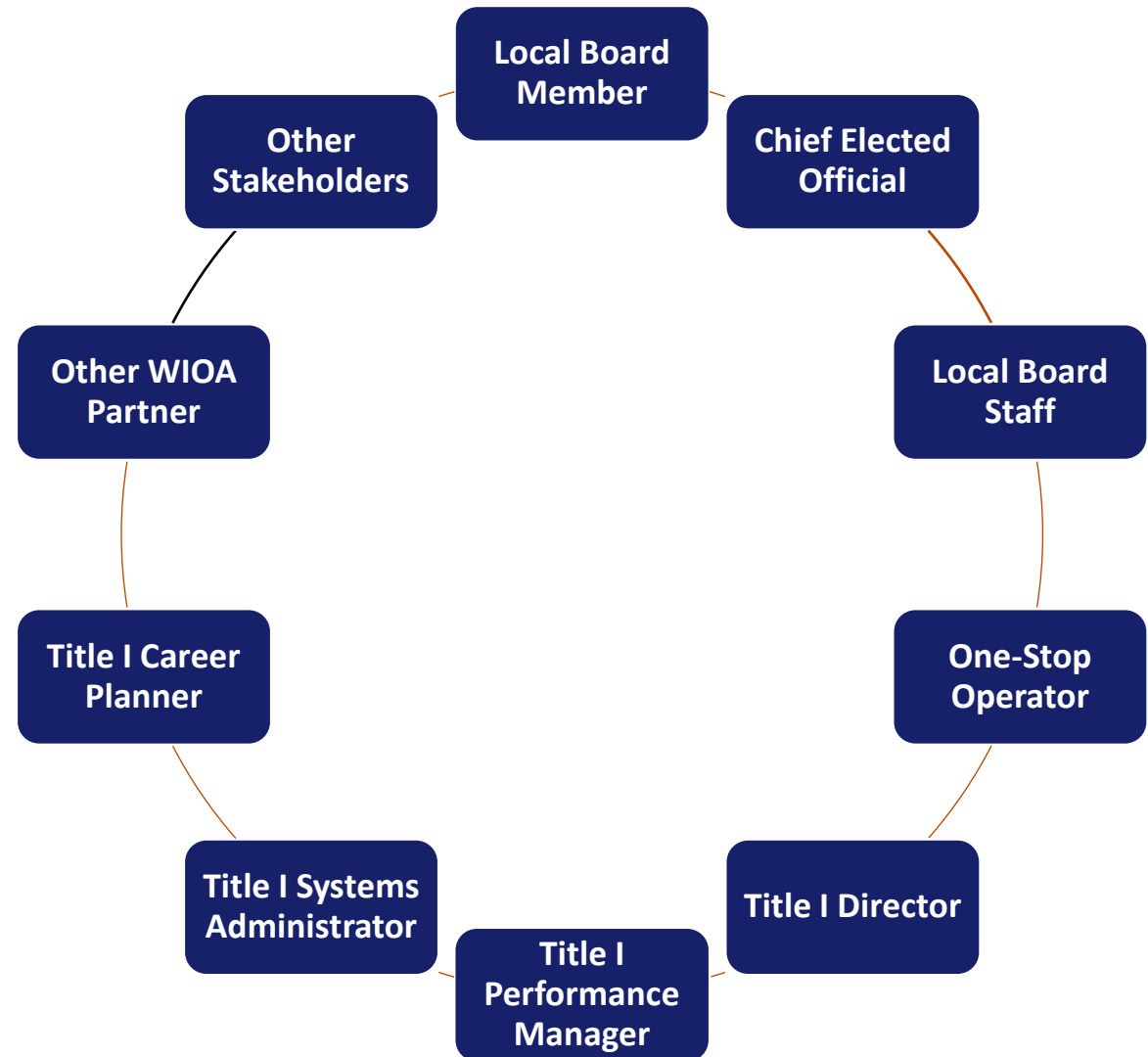
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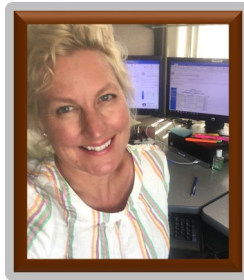
Where is
Your Local
Area?



What is Your Role in the WIOA System?

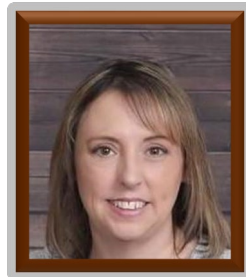


State Team



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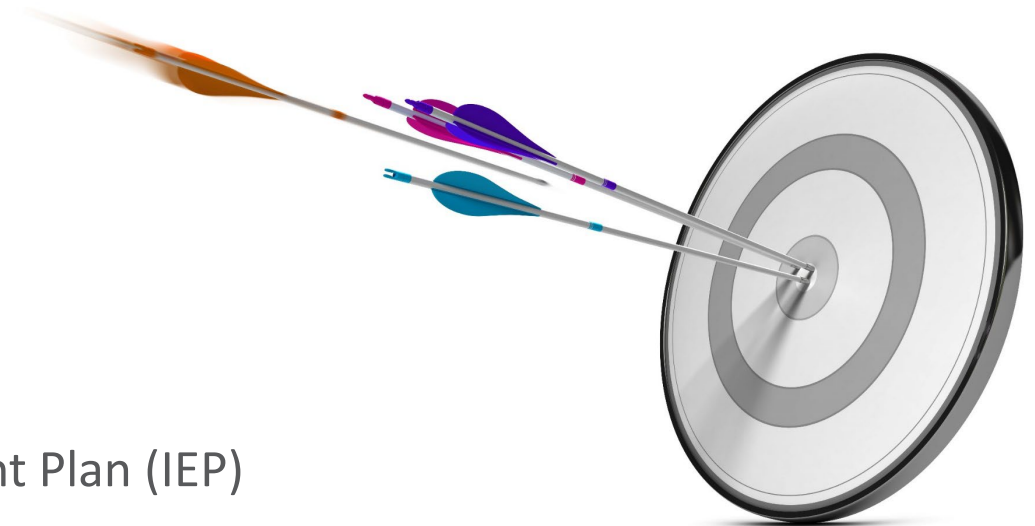


Jim Potts

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Office of Employment and Training - OET
Illinois Department of Commerce and Economic Opportunity

Today's Objectives

- WIOA Title I Adult and Dislocated Worker Services "Tabs"
- Prep for WIOA Title I Services Matrix Version 2 (V2) (2025) Release
- What are the key changes in Version 2 (2025)?
- Run down allowable Career and Training Services
 - Highlight & Review Definitions
 - Rules for Reporting
 - Understand updates and changes
- Find out more ways to use the document:
 - Tool for the Development of Individual Employment Plan (IEP)
 - Performance Reporting guide
- Interactive Check-ins/Poll Questions



Understanding the Common Language

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Five categories of WIOA IA/ID Services

- Basic Career STAFF ASSISTED
- Individualized Career
- Training
- Supportive (04/15/2025 webinar)
- Follow-Up (04/15/2025 webinar)

Understanding the Common Language

What are the three general **types** of services?

1. "Active"/Enrollment Services

- Triggers participation
 - Service record or episode extends participation by resetting the clock on the "90-Day Rule" for exit.
- Extends 90-Day Exit Window
 - Each additional service begins a new 90-day window to the program exit date.
 - Extends the participation period and exit.
 - Related to the 90-Day Exit rule compliance.
 - Column on Matrix – "Triggers Participation/Extends 90-Day Exit Window (Enrolled Service)"
 - **Does not apply to episodes of the Development of IEP**

2. Non-Enrollment Services and Activities

- Services or activities that continue supporting the education or employment plan but don't trigger participation or extend the exit date.



Understanding the Common Language

What are the three general **types** of services?



3. Same-Day Services

- Staff-assisted service can be provided on one or more days, but each occurrence is considered another episode.
- The service or activity start and end on the “same day”.
- Services cannot be left open.
- Episodes are added to one, original record.
- Case notes are required.
- Never applies to training.

Understanding the Common Language

Services have relationships to:

- **WIOA Performance Measures**

- Matrix - “*Performance Measure(s)”
 - This column lists all WIOA performance measures that will apply to participants enrolled in each service.
 - Column indicates service will be counted in the measure (denominator) and outcomes are reported.
 - Career Services and Training Services relate to certain measures.

- **Minimum Training Expenditure Requirement (MTE) – 50%**

- Matrix – “MTE – 50%”
 - Service may contribute to the 50% Minimum Training Expenditure (MTE).
 - When a participant is enrolled in services indicating “Yes”, the costs associated with the service may count towards the LWIB’s 50% rate.

PLEASE
NOTE

Note

Service “rules” may apply to definitions, documentation, and reporting.

Understanding the Common Language

The Rules that apply to services are found in:

- **Definitions:** Circumstances and expectations that are created by provision of the services and are tied to policy.
- **Documentation & Sources:** Provision of certain services must be validated and supported by appropriate recording of activities by data entry and uploading documents in Management Information System (MIS) i.e.; IWDS and Career Connect and Illinois workNet.
- **Reporting:** Timely data entry and reporting of appropriate activities and services as they occur to have complete data integrity, accurate tracking of participant services, and full accountability of the program.
- **Case Management Systems:** The system has edits that track the timing and follow through of the services.
- **Integrity:** Prompt, complete, and thorough case management service delivery actions from application all the way through exit and follow-up services is critical
- **Accountability:** 10-day Rule for adding services in MIS.

Service Entry General Rules

- Critical Steps –Assessments and Development of IEPs – Career Plans
- Career Planning service episodes don't capture everything.
 - More to come....
- IEP - Goals/Objectives -
 - List them.
- Services and Activities – If you don't enter them, they "didn't happen".
- Case Notes/Episodes – Essential for telling how or why each benefit/service was provided or carried out.
- No required sequence or order for IA/ID services *after the initial and comprehensive assessments have been done and the IEP has been developed & documented.*

Additional Episode vs General Case Note

- **Episode** = A service is provided when staff uses the information to determine a participant's course of action or next steps.
 - For example, if the participant shares a note from an employer or provides grades or other information that spurs discussion and ultimately alters service delivery or plans:
 - Direct benefit to customer (a service).
 - This is a Career Planning service, and a service EPISODE is the method of documentation.
 - Participants will remain in the program for at least 90 more days before exit is determined.
- **General Case Note** = A service has NOT been provided when communication is two-way but is “Information ONLY” and no benefit has been received.
 - For example, you held a brief conversation to verify employment or ensure everything was going well with the participant and no requests were made of you for more services.
 - You are NOT providing a service.
 - General Case Note is the method of documentation.
 - Individual cases should be reviewed for exit since no service is provided.

Additional Episode vs General Case Note

Should I document an EPISODE?

YES, if:

- WIOA Staff is providing assistance necessary for an individual to successfully complete WIOA services and activities.
- Benefit received by customer.
- Productive efforts by Staff or customer resulting in actionable steps to carry out IEPs, enroll in services, or place in employment.
- Justifies need for additional assistance from Staff.
- Might be the date of exit if no other service needed.

Should I add a CASE NOTE ONLY?

YES, if:

- Only providing brief updates, confirmations of status or, employment verification for performance and goals met.
- No actionable steps are identified by staff or individuals.
- Administrative function.
- No request for help or assistance.
- Will not align with the exit date.

Note

“General” and “Standard” Case Notes are both referring to a case note that is NOT attached to a service episode.

Basic Career Services - Definition

Basic Career Services

- Basic career “universal” services are available to everyone without having to be enrolled in the program. “Self-Services”
- Administrative activities such as eligibility determination, intake, and orientation are included in this type of service.
- Currently, there is no tab in the Services Matrix for these services.



Basic Career Services – Staff Assisted

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Five categories of WIOA IA/ID Services

- Basic Career STAFF ASSISTED
- Individualized Career
- Training
- Supportive (04/15/2025 webinar)
- Follow-Up (04/15/2025 webinar)

Basic Career Services - Definition

Basic Career STAFF-ASSISTED

- "Basic Career" (STAFF ASSISTED) are services that require staff involvement to determine the participants' need or level of services that would benefit them through participation in the Adult or Dislocated Worker program.
- Provided in a "One-on-one setting" with significant Title IB staff assistance.
- Essential for establishing relationships with customers.

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Basic Career Services - Rules

Basic Career STAFF-ASSISTED

- **Six** Basic Career Services included in the Services Matrix are all “STAFF-ASSISTED”
- Triggers enrollment in WIOA
- All are Same-Day Services
- All are Enrollment Services
- Relationship to WIOA Performance
 - Employment Measures
 - Employment Rates 2nd and 4th Quarter after Exit
 - Median Earnings 2nd Quarter after Exit

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Basic Skills Screening Tool (BSST)

Policy and Reporting Rules

Basic Skills Screening Tool (BSST)

- Used to determine basic skills deficiency for eligibility and priority of service.
- Must be given before conducting any assessments.
- It is not given as part of a career service for Adults and Dislocated Workers or the Objective assessment for Youth.
- If any question is answered as no, the individual is considered basic skills deficient.
- Referrals are to be made as appropriate.
- Career planners must use the tool's results during the initial assessment to determine if the individual needs specific accommodations or services.

Basic Career (STAFF ASSISTED)

What are the available IA/ID WIOA "STAFF ASSISTED" Basic Career Services?

All SIX require "one-on-one setting"

- "Job Search ~~Activities and~~ Assistance (STAFF ASSISTED)"
- "Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)"
 - NEW RULE! V2 (2025) Required for IA/ID prior to Developing Individual Employment Plans (IEP)
- "Referred to Employment/Placement Assistance (STAFF ASSISTED)"
- "Career Information ~~Counseling/Guidance~~ Services (STAFF ASSISTED)"
 - **NEW Label and Definition**
- "UI Filing Information (STAFF ASSISTED)"
- "Assistance Establishing Eligibility for Financial Aid (STAFF ASSISTED)"

Basic Career (STAFF ASSISTED)

Service Highlight

Job Search Assistance and Career Information Services

- Both services are Basic (STAFF ASSISTED) Career Services if provided in a one-on-one setting with Title IB staff involvement.
- When provided by staff, it becomes beyond information only and the customer benefits.
- Revised/expanded definitions for both since V 1 of Services Matrix.

Basic Career (STAFF ASSISTED)

Job Search Assistance (STAFF ASSISTED)

- Focus on Job Search Process
- Benefits to customers:
 - Job Hunting strategy
 - Locate job openings
 - Employer contacts
 - Writing a resume and cover letter(s)
 - Filling out job applications
- As needed to meet IEP goals

Career Information Services (STAFF ASSISTED)

- Focus on Information to Choose a Career
- Benefits to customers:
 - Researching career options
 - Understanding occupational information and data
 - Look at Demand Occupations (DOTL): wages, openings, employers, locations, and education requirements
 - Training Options (when applicable)
 - Help looking at training Providers' outcomes
 - Other relevant "ETPL" data and details

Individualized Career Services

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The initial assessment can also capture intake information about eligibility and additional details - such as work history, educational attainment levels, income, and family status - that support initial conversations about the career service and training needs of the individual. While this initial step of assessment provides an important administrative function, staff must also consider the opportunities for utilizing the initial assessment as a first step in the programmatic engagement of the individual. Individualized career and/or training services identified through the initial assessment offer the starting point for engaging in a comprehensive and specialized assessment process.															
NOTE: This basic career service differs from the individualized career service "Comprehensive and Specialized Assessments" because it is provided initially to gather preliminary information (requiring staff assistance) whereas, the latter is more in-depth assessments of a participant.															
Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER															
No															
Yes															
Yes															
IA ID Staff-Assist & Ind Career															
IA ID Training Services															
YOUTH Program Elements															
Supportive Services (SS)															
Follow-Up Services															
Work-Based Learning (WBL)															
Disaster Recovery DRE															

Five categories of WIOA IA/ID Services

- Basic Career STAFF ASSISTED
- Individualized Career
- Training
- Supportive (04/15/2025 webinar)
- Follow-Up (04/15/2025 webinar)

Individualized Career Services - Rules

Individualized Career Services

- Must be identified in the Individual Employment Plan (IEP)
- Analytical, informed assessments to develop employment strategies.
- Requires in-depth communication with the customer.
- Outline steps for success/meeting goals.
- Can only be provided during participation.
- **Nine** Individualized Career Services (5 are WBLs).
- Some are Same-Day; some may be left open.
- Relationship to WIOA Performance -
 - Employment Measures
 - Employment Rates 2nd and 4th Quarter after Exit
 - Median Earnings 2nd Quarter after Exit

WIOA Services - PIRL OMB Control Number 1205-0521, TEGL 19-16, and TEGL 10-16, CH 2 Attachment VII Table A Participant Level Services Chart						
WIOA BASIC AND INDIVIDUALIZED CAREER Services - (PIRL Data Element Nos. 1000, 1002-1004, 1007, 1100-1113, 1115-1116, 1200-1203, 1205-1207, 1210-1211)						
Staff-Assisted Basic and Individualized Career Services: WIOA Title I Adult and Dislocated Worker						
PIRL Data Element Name	Career Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service contributes to the Minimum Training Expenditure Requirement	Same-Day Service?	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
Basic Career Services (STAFF ASSISTED):						
"Basic Career" (STAFF ASSISTED) are services that require staff involvement to determine the participants' need or level of services that would benefit them through participation in the Adult or Dislocated Worker program.						
Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)	Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)	<p>Initial steps of customer engagement. Collecting preliminary information about the individual's skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs.</p> <p>The initial assessment is intended to be a brief, preliminary information-gathering process that, among other things, provides sufficient information about an individual's basic literacy and occupational skill levels to enable appropriate referrals to services available through the One-Stop operator and partner programs.</p> <p>The initial assessment can also capture intake information about eligibility and additional details - such as work history, educational attainment levels, income, and family status - that support initial conversations about the career service and training needs of the individual. While this initial step of assessment provides an important administrative function, staff must also consider the opportunities for utilizing the initial assessment as a first step in the programmatic engagement of the individual. Individualized career and/or training services identified through the initial assessment offer the starting point for engaging in a comprehensive and specialized assessment process.</p> <p>NOTE: This basic career service differs from the Individualized Career Service "Comprehensive and Specialized Assessments" because it is provided initially to gather preliminary information (requiring staff assistance) whereas, the latter is more in-depth assessments of a participant.</p>	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER	No	Yes	Yes

Individualized Career Services

What are the available WIOA Individualized Career Services for IA/ID?

- Comprehensive and Specialized Assessments - **NEW Rule/Definition: Required for Development of IEPs**
- Development of an IEP - **New Definition/Rules**
- ~~Group Workforce Research/Workshops/Job Clubs~~
- Career Planning (~~Case Management~~)
- Short-Term Prevocational Services (Job Readiness)
- Work-Based Learning (WBL)
 - WBL - Paid WEX/Internship
 - WBL - Unpaid WEX/Internship
 - WBL - Pre-Apprenticeship
 - WBL - Job Shadowing
 - WBL - Transitional Jobs
- Workforce Preparation Activities ~~Skills~~
- Financial Literacy Services
- Out-of-Area Job Search/Relocation Assistance
- English Language Education



Individualized Career Services

Update: Services Matrix V2 (2025)

Policy and Reporting Rules

#1 - “Initial Assessment of Skill Levels & Other Needs”

#2 - “Comprehensive and Specialized Assessment”

#3 - “Development of an IEP”

- Both assessment types are required. Not one or the other.
- All three must occur before all other enrolling basic and individualized career services.
- See Career Planning Policy.

Individualized Career Services - Initial

Update: Services Matrix V2 (2025)

Policy and Reporting Rules

- Required First:
 - Initial Assessment of Skill Levels & Other Needs is:
 - First Enrolling Service for participation.
 - One-on-One. Asking questions.
 - First step of engagement/relationship.
 - Look at and interpret Basic Skills Screening Tool (BSST) responses.
 - Prepping for *comprehensive and specialized assessment* process.
 - Conversations, discussion, interests, barriers/challenges.
 - Asking and documenting “what does my client need?”

Individualized Career Svcs - Comprehensive

Update: Services Matrix V2 (2025)

Policy and Reporting Rules

- Required Second:
 - Comprehensive and Specialized Assessment is:
 - Essential for Career Plan Development
 - Diagnostic and proficiency tests
 - Results and analysis of tests help define IEP.
 - **Math and Reading: These are only required for customers planning to attend ITA-funded training.**
 - Analysis of results of any test
 - For example: “Interest profiler” - Sammy scored high on the “realistic area”, which indicates work preference is practical, hands-on...”
 - What is a good fit?
 - The Narrative section on the assessment summary screen is required.

Individualized Career Svcs - Comparison

Basic Career (STAFF ASSISTED) Initial Assessment of Skill Levels & Other Needs (STAFF ASSISTED)

- Initial one-on-one discovery and conversations
- Establishes relationship between Individual and Career Planner/Coach
- Review BSST responses
- Engagement that leads to future assessments
- Identify next steps

Individualized Career Comprehensive and Specialized Assessments

- In-Depth Assessment & Analysis
- Testing, Learning details about Abilities & Skills (diagnostic, proficiency)
- On-going throughout participation
- Not brief, thorough
- Carry Out/Steps identified in the Initial Assessment
- Active participation, work towards individual's goals
- Assessment Summary screen Narrative

Individualized Career Services - IEP

Update: Services Matrix V2 (2025)

Policy and Reporting Rules

- Required Third:
 - Development of an IEP is:
 - The IEP is a plan that outlines the customer's needed services based on the initial and comprehensive assessments.
 - The development of the IEP is a service.
 - All three must occur before all other basic and individualized career



Individualized Career Services - IEP

Update: Services Matrix V2 (2025)

Development of an Individual Employment Plan (IEP)

Policy Rules Defined:

- Joint effort between the career planner/coach and participant.
- Note that there is no required sequence or order for IA/ID services. However, initial and comprehensive assessments must be done to develop and document the IEP.
- IEPs should be:
 - Descriptive. Tells the ongoing strategy (objectives) for the participant to achieve their goals.
 - Detailed. Lists career and training services planned/needed; a framework.
 - Supportive. Justify and back-up decisions made about service delivery for customers.

Individualized Career Services - IEP

Update: Services Matrix V2 (2025)

Development of an Individual Employment Plan (IEP)

Rules for Reporting:

- Only enter the "Development of an IEP" service once on date it is developed.
- After that, the IEP is an administrative document, not a service.
- After the initial plan is developed and documented, episodes are used to document updates and changes in the plan.
 - IEP episodes shall not extend participation (at time of Go-Live).
- Always document career and training services provided to carry out the career plan separately.
- Rules for episodes do not apply to LWIA 7/Career Connect.

Knowledge Check

Update: Services Matrix V2 (2025)

Development of an Individual Employment Plan (IEP)

POLL 1 – IEP Rules

A Paid Work Experience (WEX) is included in a Customer's IEP and the customer successfully completes the Paid WEX with their employer.

- Should you add an additional episode to the IEP?
 - A. Yes
 - B. No

Knowledge Check

Update: Services Matrix V2 (2025)

Development of an Individual Employment Plan (IEP)

POLL 1 – IEP Rules - Answer

A Paid Work Experience (WEX) is included in a Customer's IEP and the customer successfully completes the Paid WEX with their employer.

- Should you add an additional episode to the IEP?
 - A. Yes
 - B. **No**

Knowledge Check

Update: Services Matrix V2 (2025)

Development of an Individual Employment Plan (IEP)

POLL 2 – IEP Rules

Customer completed a goal in the IEP by obtaining employment related to training in an in-demand occupation with Staff Assistance.

- Does this require an additional episode in the IEP?
 - A. Yes
 - B. No

Knowledge Check

Update: Services Matrix V2 (2025)

Development of an Individual Employment Plan (IEP)

POLL 2 – IEP Rules - Answer

Customer completed a goal in the IEP by obtaining employment related to training in an in-demand occupation with Staff Assistance.

- Does this require an additional episode in the IEP?
 - A. Yes
 - B. **No**

Knowledge Check

Development of an Individual Employment Plan (IEP)

POLL 3 – IEP Scenario

A customer no longer wants to be an RN (established in original IEP) and now wants to be an Aviation Mechanic. This requires new goals to be established to become an Aviation Mechanic. New goals are Developed as part of the IEP and updated paper file. The original IEP was developed on 11/20/2024 and the customer and staff met on 3/15/2025 regarding the change in training and career plans.

- What are the required next steps of career planner/coach in handling the IEP document for the customers career plan? Choose the best answer.

Knowledge Check

Development of an Individual Employment Plan (IEP)

POLL 3 – IEP Scenario - Answer

- A. The IEP must be updated to include new goals and objectives related to the change in training occupation.
- B. A copy of the completed (or updated) and signed IEP or ISS shall be provided to the participant, recorded in case notes, and updated on the hard copy in the participant file.
- C. A new episode of the IEP should be entered into the system to document the changes made to the IEP.
- D. All of the above.

Individualized Career Services

Update: Services Matrix V2 (2025)

Career Planning (~~Case Management~~)

- Beyond Information: Career Planning based on one-on-one in-depth “coaching” or “counseling”
- Discovery and analysis of whether the customer’s existing skills are in demand in the local economy
- Providing materials, recommendations, suggestions, or advice to assist the participant in making occupation or career decisions
- Not “Case Management” – not administrative duties, tracking, or data entry

Individualized Career Services

Service Highlight

Short-Term Prevocational Services and Workforce Preparation

Activities-Skills

- Both services are Individualized Career Services.
- Short-Term Prevocational Services are for individuals who already possess skills but need assistance to upskill or obtain a credential or certification in their specific occupation.
- Workforce Preparation Skills is broader and focuses on preparing individuals for the workforce and further education and/or training.

Individualized Career Services

Short-Term Pre-Vocational Services (Job Readiness)

Benefits for customers:

- Focus on fundamental job requirements
- Individuals who already have in-demand occupational skills
- Prep for licensing or certification exams
- Enhance with non-occupational type classes to gain technology skills, OSHA, CPR computers courses

Workforce Preparation **Activities** Skills

Benefits for customers:

- Focus on obtaining, retaining employment and advancement.
- **Digital Literacy**
- "Soft Skills" or "Essential Employability Skills"
- Not career- or industry-specific skills.
- Coaching to promote good work habits, attitude, communication skills, handling oneself in the workplace, integrity.

Knowledge Check



POLL 4 – Service Entry Scenario

Staff spent several hours over the course of a few weeks working with employers to find job opportunities related to the customer's goal and assisted the customer throughout the process – application, interviewing, being hired, etc.

- Which career service(s) should be documented for the customer?

Knowledge Check

POLL 4 – Service Entry Scenario - Answer

Staff spent several hours over the course of a few weeks working with employers to find job opportunities related to the customer's goal and assisted the customer throughout the process – application, interviewing, being hired, etc.

Which career service(s) should be documented for the customer?

- A. Career Information Services (STAFF ASSISTED)
- B. Job Search Assistance (STAFF ASSISTED)
- C. (WBL) Paid Work Experience
- D. Referral to Employment/Placement Assistance (STAFF ASSISTED)
- E. Development of an IEP

Knowledge Check

POLL 5 – Service Entry Scenario

I'm working on an IEP with my customer. They just graduated from nursing school, and we are assisting them in studying for exams for their license and paying for the exam fee. The definition for *Short-Term Prevocational Services (Job Readiness)* and *Workforce Preparation Activities* look like they provide some of the same activities or impart similar skills.

- Which service(s) should be documented to report the benefits provided for the customer?



Knowledge Check

POLL 5 – Service Entry Scenario - Answer

I'm working on an IEP with my customer. They just graduated from nursing school, and we are assisting them in studying for exams for their license and paying for the exam fee. The definition for *Short-Term Prevocational Services (Job Readiness)* and *Workforce Preparation Activities* look like they provide some of the same activities or impart similar skills.

- Which service(s) should be documented to report the benefits provided for the customer?
 - A. Short-Term Prevocational Services (Job Readiness)
 - B. Workforce Preparation.
 - C. Update the IEP with an episode and report a Short-Term Prevocational Services (Job Readiness) career service.
 - D. "Other Supportive Services" to report the exam payment benefit received by the customer.
 - E. Both A and D

Knowledge Check

POLL 6 – Service Entry Scenario

An Adult customer, Annie, and her career coach, Noelle, meet to discuss and look at different types of jobs/occupations that are out there that may be of interest.

Noelle **fully informs** Annie about the State ETPL and how it can help choose a provider, like a college, and training program. They spend at least an hour or more examining information on providers that can train for certain jobs, the programs performance outcomes, costs and locations.

- Which service(s) should be documented to report the benefits provided for the customer?

Knowledge Check

POLL 6 – Service Entry Scenario - Answer

An Adult customer, Annie, and her career coach, Noelle, meet to discuss and look at different types of jobs/occupations that are out there that may be of interest.

Noelle **fully informs** Annie about the State ETPL and how it can help choose a provider, like a college, and training program. They spend at least an hour or more examining information on providers that can train for certain jobs, the programs performance outcomes, costs and locations.

Which career service should be documented for the customer?

- A. Initial Skills Assessments and other needs
- B. Career Planning
- C. **Career Information Services**
- D. Development of an IEP
- E. Job Search Assistance
- F. Comprehensive and Specialized Assessments.

Individualized Career Services

Update: Services Matrix V2 (2025)

Group Workforce Research/Workshops/Job Clubs

Policy and Reporting Rules:

- These are not Basic (STAFF-ASSISTED) or Individualized Career Services.
 - It is not done in a one-on-one setting.
 - Moved to the bottom of the tab in the non-enrolling section of the matrix.
- It will not extend participation or reset the 90-day exit clock.
- It remains in the IWDS/Career Connect dropdown for tracking purposes.

Individualized Career Services

Update: Services Matrix V2 (2025)

Pro Tips: Group Workforce Research/Workshops/Job Clubs

- If last service/exit date is a Group Workforce Research/Workshop/Job Club activity and no other one-on-one staff assisted service was provided, review for exit.
- If Group Workforce Research/Workshop/Job Club was entered but entailed one-on-one staff involvement to benefit customer, use matrix to find and report career service provided.

Five categories of WIOA IA/ID Services

- Basic Career STAFF ASSISTED
- Individualized Career
- Training
- Supportive (04/15/2025 webinar)
- Follow-Up (04/15/2025 webinar)

Training Services - Definition

Training Services:

- Training services, when determined appropriate, must be provided either through an Individual Training Account (ITA) or through a training contract.
- TEN 19-22 Change 1!
 - IEPs must be in place
 - ETPL requirements apply to ITA-funded programs
 - Local Boards must establish ITA policies. They may limit WIOA funding or the duration of a participant's training program.

WIOA Services - PIRL OMB Control Number 1205-0521, TEGL 19-16, and TEGL 10-16, CH 2 Attachment VII Table A Participant Level Services Chart				
WIOA TRAINING Services - (PIRL Data Element No. 1300, 1-12)				
Training Services: WIOA Title I Adult and Dislocated Workers				
Training Service/Activity Label (IWDS)	Definition	*WIOA Performance Measure(s)	MTE - 50%: Service Contributes to the Minimum Training Expenditure Requirement	Triggers Participation/Extends 90 Day Exit Window (Enrolled Service)
<u>OJT - Private Sector</u>	OJT is provided under a contract with an employer or registered apprenticeship program sponsor in the private non-profit or private sector. Through the OJT contract, occupational training is provided for the WIOA participant in exchange for the reimbursement, typically up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and supervision related to the training. LWIAs must consider skill requirements of the occupation, participant's academic and occupational skill, work experience and the IEP. An OJT contract must be limited to the period of time required for participant to become proficient in the training related occupation. Illinois ETPL requirements do not apply.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures AMSG/DMSG	Yes	Yes
<u>OJT - Public Sector</u>	Same as OJT just provided in the Public Sector. All provisions listed for OJT - Private Sector apply here.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures AMSG/DMSG	Yes	Yes
<u>Skill Upgrading and Retraining</u>	Short-term or part-time training designed to upgrade skills in the workplace and provide retraining to enhance current skills. Courses that provide an occupation changing type of instruction to prepare persons for entrance into a new occupation through instruction in new and different skills demanded by technological changes. Further, these are courses promoting skills upgrading to train incumbent workers in specific skills needed by that business or industry and that lead to potential career growth and increased wages. This includes courses that develop professional competencies that are particularly relevant to a vocational/occupational goal as specified in the Individual Employment Plan (IEP). It must be demonstrated that the training will result in the workers' acquisition of transferable skills that result in an industry-recognized certification or credential. Training program must be on the Illinois ETPL.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures ACAR/DCAR AMSG/DMSG	Yes	Yes
<u>Entrepreneurial Skills Training</u>	Entrepreneurial skills training must provide the basics of starting and operating a business. These skills include but are not limited to, developing budgets and forecasting resource needs, business plan development, securing financing, general business law concepts, employee management, and the understanding of marketing concepts. Training program must be on the Illinois ETPL.	Employment Measures AEER2/DEER2 AEER4/DEER4 AMER/DMER Training Measures ACAR/DCAR	Yes	Yes

Training Services - Rules

Rules and Relationships

- Performance Measures
 - Credential Attainment Rate and/or Measurable Skill Gains (MSGs)
- ITA funded training
 - ALL Successful training program completions should result in a post-secondary Credential and MSG.
 - ETPL Applies
- Contract funded training
 - Post- secondary credentials do not apply, these should result in Measurable Skill Gains (MSG).
- All training services count toward the 50% minimum training expenditure requirement.

Note

Same-Day Services do not apply to Training Services

Training Services

What are the available WIOA Training Services for IA/ID?

- On-the-Job Training (OJT) - Private Sector
- On-the-Job Training (OJT) - Public Sector
- Skill Upgrading and Retraining
- Entrepreneurial Skills Training
- WIOA Title IB Funded Adult Education w/Training (ICAPS programs.)
- English Language Education
- Customized Training
- Occupational Skills Training
- Prerequisite Training
- Registered Apprenticeship Program (RAP)
- Future Scheduled Service ~~Planned Gap/Holding~~
- Training Paid by NON-WIOA Title I Funds



Training Services

Update: Services Matrix V2 (2025)

Service Highlight

Prerequisite Training

- IA/ID ONLY
- Guidance – TEN 19-22 Change 1
- Education and workforce systems use different definitions for prerequisites.
- ETPL applies. Program must lead to credential.
- How do I know when I should document a Prerequisite Training?

Career Pathways



Training Services

Update: Services Matrix V2 (2025)

Prerequisite Training

TEN 19-22 Change 1

- DO document Prerequisite Training when:
 - The program(s) of study are required to move to the next phase in the career pathway, and they are described in the program of study/training program description for the final program of study.
 - The services must be established in the IEP.
 - Example: CNA to LPN to RN. The CNA and LPN programs may be considered Prerequisite Training by workforce staff for an RN, and the RN would be the final program that would be documented as the Occupational Skills Training (OST).

NOTE: If CNA is required for the RN program, the Pre-Req line will be opened because the CNA training meets the definition of pre-requisite in TEN 22-19, Change 1.

Training Services

Update: Services Matrix V2 (2025)

Prerequisite Training

- Do NOT document Prerequisite Training when:
 - Classes/courses are required as prerequisites by a college/training provider in the catalog to enter a program of study.
 - The classes/courses are part of the program of study and are rolled into the Occupational Skills Training (OST) service line.

NOTE: ONLY enroll into the "OST" service line when classes/courses are included in the curriculum of the program of study in which they intend to enroll.

Training Services

Update: Services Matrix V2 (2025)

Prerequisite Training

- General education courses **listed** as courses in a program of study in the course catalog are considered part of the entire program of study and included in the Occupational Skills Training line.
- General education courses **not listed** as courses in a program of study are not considered training.

NOTE: If a single, stand-alone class such as BIO100 is part of the program of study in the course catalog, it should be included in the Occupational Skills Training line.

Training Services

Update: Services Matrix V2 (2025)

Future Scheduled Service ~~(Planned Gap Holding)~~

- New definition and policy rules.
- NOT a service, never extends participation or exit.
- To be used very rarely in extenuating circumstances.
- Monthly check-ins are a good practice.



Work-Based Learning

WIOA Services - PIRL OMB Control Number 1205-0521		
WIOA Work-Based Learning (WBL) Experiences - (PIRL Data Element No. 1205, 1-7)		
WIOA Title I Adult, Youth, and Dislocated Workers WBL		
PIRL Data Element Name	Program	Service/Activity Label (IWDS)
Summer Employment/Internships during the summer (WIOA Youth)	IY ONLY	WBL - Paid WEX/Internship (Youth Limited to Summer Months)
- Summer Months are defined in IL as May 1st through September 30th.		WBL - Unpaid WEX/Internship (Youth Limited to Summer Months)
Employment Opportunities, Including Internships, not limited to summer months**	IA, ID, IY	WBL - Paid WEX/Internship (Not Limited to Summer Months)
		WBL - Unpaid WEX/Internship (Not limited to Summer Months)
Pre-Apprenticeship Programs	IY, IA, ID	WBL - Pre-Apprenticeship
Job Shadowing	IY, IA, ID	WBL - Job Shadowing
On-the-Job Training (WIOA Youth)*, **	IY ONLY	WBL - OJT - Private Sector (Youth)
		WBL - OJT - Public Sector (Youth)
Transitional Jobs	IA, ID, DWG	WBL - Transitional Jobs
Incentives	IY ONLY	Cash Incentives (Youth)
* YOUTH OJTs are Career Level/Work-Based Learning Experiences (WBL). This differs for WIOA IA and ID.		
**Youth OJT (839, 840) and/or **Employment Opportunities Not Limited to Summer Months (445, 446) are NOT recorded in IWDS when the service is directly related to the participant's Pre-Apprenticeship. These activities must be selected in a dropdown when adding a Pre-Apprenticeship service.		
IA ID Staff-Assist & Ind Career IA ID Training Services YOUTH Program Elements Supportive Services (SS) Fol		

Work-Based Learning (WBL):

Allows employers to train their employees while continuing to be productive members of the workforce.

- “Earn and Learn”
- WBLs are categorized as Individualized Career Services and are not WIOA Training services
- Definitions expanded in IA/ID Career Tab
- Relationships:
 - Performance Measures
 - MTE -50%

Questions or Comments

Submittal of Questions or Comments

- Each LWIA identify a point person in your office(s) to gather and submit Questions or Comments
- Submit each through the [WIOA Title IB Services Matrix FAQ](#) page
- Keep them general, brief, and applicable to twenty-two LWIA representatives
- Questions should not contain Participant names, addresses, or other PII

Responses to Questions or Comments

- [Open Q&A](#) session scheduled on the April 15th, 2025 (10:00) Webinar
- Be prepared to present the question during the Open Q&A session for OET to respond
- Posted to [WIOA Title IB Services Matrix FAQ](#) page





What's Next for WIOA Services Matrix Technical Assistance?

The following Listing of Topics and Dates is for ALL Users of the Illinois Workforce Development System (IWDS) or Illinois workNet[®]. If located in LWIA 7 and use the Career Connect reporting system, please check with your Administrator for dates of Technical Assistance. You do not need to attend our webinars on the 8th, 11th, or 15th.

- **April 4th, 2025: 10:00 am - 11:30 am**
WIOA Title I Services Matrix Overview – Session 1
- **April 8th, 2025: 10:00 am – 11:30 am**
Adult and Dislocated Worker Services Matrix– Session 2
- **April 11th, 2025: 10:00 am – 11:30 am**
Youth Services Matrix - Session 3
NOTE: Go Live Date in IWDS 04/11/25 Overnight
- **April 15th, 2025: 10:00 am – 11:30 am**
WIOA Supportive Services, Follow-Up and Open Question and Answer – Session 4



[Register to receive email notifications of Workforce Professional Development opportunities by joining the Email List Serve](#)

All Webinars are recorded and will be available on the [Illinois workNet Videos and Training Materials](#) and [WIOA Professional Development Workforce Webinars](#)

Resources

- [Workforce Innovation and Opportunity Act: Public Law; Final Rules, Joint Rule and Labor Only](#)
- [Workforce Innovation and Opportunity Act Section 116\(c\)](#)
- [U.S. DOL Training and Employment Guidance Letter \(TEGL\) 19-16, Guidance on Services provided through the Adult and Dislocated Worker Programs under the Workforce Innovation and Opportunity Act \(WIOA\) and the Wagner-Peyser Act Employment Service \(ES\), as amended by title III of WIOA, and for Implementation of the WIOA Final Rules](#) (March 1, 2017)
- [TEGL 21-16, Third Workforce Innovation and Opportunity Act \(WIOA\) Title I Youth Formula Program Guidance](#) (March 2, 2017)
- [TEGL 21-16, Change 1, to Training and Employment Guidance Letter \(TEGL\) 21-16 Third Workforce Innovation and Opportunity Act \(WIOA\) Title I Youth Formula Program Guidance](#) (July 30, 2021)
- [TEN No. 19-22, Change 1, Reporting Training in US DOL's PIRL](#) (March 31, 2023)
- [TEGL 10-16, Change 3, Performance Accountability Guidance for Workforce Innovation and Opportunity Act \(WIOA\) Title I, Title II, Title III, and Title IV Core Programs](#) (June 11, 2024)



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thank you