October 30, 2019

Exiting a Customer in IWDS: "FYI and Step-by-Step"

Exit a Customer: WIOA Rule

➢ **What does to "Exit a customer" mean?**

- The term "exit" is actually referring to the time when a WIOA customer leaves, or "exits" the program. Think of leaving a building through a door...this door is actually our system, IWDS, the Illinois Workforce Development System.

- In WIOA, we exit our customers by "telling" our case management system when customers are leaving the program.

- This is done by creating a customer exit record in IWDS.

Exit a Customer: WIOA Rule

➤ **When should I exit a customer?**

- WIOA law requires participants to be exited once they have not received a service (or have any services planned) for 90 days…

- We need to "exit" customer when they have stopped participating and are no longer receiving any WIOA services.

- In other words, customers cannot "hang-out" in the program if they go a few months without participating.

Exit a Customer: WIOA Rule

➢ **Why is a customer's Exit date important?**

- The Exit date is when the "clock starts ticking" on the customer's follow-up services and performance outcomes.

- When we create a customer exit in IWDS, the "Exit *date*" is automatically updated by the system. The exit date is *always* the end date of their last WIOA service.

Exits in IWDS

- **How do I make sure I am Exiting my customers "on time"?**
  - Run the "Days Since Last Active Service Report" in IWDS.

  - You will find your customers who you have not served, or recorded a service for, for in 90 days.

  - Click on "Reporting Menu" on the Staff Menu.

Exits in IWDS

How do I make sure I am Exiting my customers "on time"?

- Then, Click on the "Days Since Last Active Service Report" in IWDS.

- You will find your customers who you have not served, or recorded a service for, for in 90 days.

Exits in IWDS

Reporting Criteria

Days Since Last Active Service

LWIA:
90 - State Workforce Investment Area

Illinois workNet(TM) Center:

Career Planner:

Statutory Program:
WIOA

Number of Days:
111

Report Format:
PDF

Description: PURPOSE: Identify customers who are approaching 90 days and up to exceeding 110 days since the date of the last service. POTENTIAL USES: Manage the LWIA exit process so that no customers exceed the 90 day with no active service limit. Used by OET to exit participants who have been 110 days without active service.

View Report   Cancel

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- **How do I make sure I am Exiting my customers "on time"?**
  - Select LWIA 90 –
  - Select Career Planner (or leave blanc)–
  - Enter "111" In the Number of Days Field:
  - Click View Report -
  - Review your report:
  - **If a customer has not been provided a service, you must exit them.**
  - **If you realize you forgot to record a service that was provided, you must update their record immediately.**

Exit a Customer in IWDS

- BASIC IWDS Check list for exiting a customer:

  1.) Add any Credentials the customer earned.
     - ✓ Because WIOA "keeps track": we all need to get credit for our customers' accomplishments in the program.

  - 2.) Update Employment:
     - ✓ Review the customers "jobs record".
     - ✓ Make sure his/her current employment, if any, is entered in IWDS.

Exit a Customer in IWDS

- IWDS Check list for exiting a customer: Continued...

  3.) Review their list of Measurable Skills Gains.
  - ✓ Make sure skills and gains have been entered, then add any we may have missed.

  4.) Services:
  - ✓ Close any open service by entering an end date and completion status (successful, unsuccessful, etc.)
  - ✓ Because...exiting means they are not getting any more services.

Exit a Customer in IWDS

- IWDS Check list for exiting a customer: Continued...

  5.) Update the General Exit Screen.
  - ✓ This is the FINAL step to enter the customer Exit in IWDS.
  - ✓ This is where you select their school status and Exit reason.

Exits in IWDS

One of the following school status, Exit Reason is required for Exit in IWDS:

- **School Status at Exit:**

- In-School/Alternative School

- In-school H.S. or less

- In-school, Post- H.S.

- Not attending school, within age of compulsory school attendance

- Not attending school, H.S. Graduate

- Not attending school, H.S. Dropout

Exit Reasons: Reasons in Yellow exclude participant from inclusion in performance/reporting to DOL.

- Attained Credential/Diploma/ Certificate

- Attained GED/Equivalency Diploma

- Attained High School Diploma

- Attending Post-Secondary School/College at Exit

- Attending Secondary (High-School) at Exit

- Cannot Locate

- Deceased

- Entered Registered Apprenticeship Program

- Entered Supplemental Employment

- Entered Unsubsidized Employment

- Foster Care (Youth Only)

- Health/Medical

- Institutionalized/Incarcerated

- Other, Services Completed

- Other, Services Not Completed

- Reserve Forces Called to Active Duty

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Exit a Customer in IWDS

- IWDS Check list for exiting a customer: Continued…

    6.) Open Follow-Up Service:
    - ✓ This is just like entering any other service but it's happening after exit to document how and when you are following-up with your client(s).
    - ✓ Record a follow-up case note on the day you enter the exit AND every time you follow-up with your customer for the following YEAR for Youth.

Exit a Customer

- The next slides will detail the exact screens and fields that we need to use in IWDS to exit a customer.

- Sceen Share or,

- Document: EXIT A CUSTOMER, Chapter 8