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INTEGRATION OF SERVICES POLICY (Co-enrollment Policy)

The Southeast Region works hard to bring integration to the area and still allow Job Centers to accommodate needs specific to their communities. Efforts are being made to meet with partners and provide common referrals, WIOA/Dual referrals and co-enrollments, and follow-up practices, per OWD Issuance ~~24-2015~~ 08-2021. The Southeast Region has developed a team approach to service delivery which provides a quality level of integrated services and products. This model focuses on service to the customer as opposed to programs for funding streams. Keeping in line with the plan's focus of service to the customer in the best way possible, when possible, having the ability to only work with one case manager instead of multiple case managers based on the program. The Workforce Development Board, One-Stop Operator, and The Division of Workforce Development share staffing functions and all assist in the coordination of services in the Job Centers.

- State staff have been trained and are assisting with WIOA Adult Basic Career Enrollments and Services and Board Staff are able to help with incoming customers and Wagner-Peyser enrollments since they have the ability to do Adult Basic Career Enrollments instead of needing the full WIOA Enrollment, as previously required.
- All Trade enrollments should have an accompanying Dislocated Worker enrollment, unless the participant meets one of the exceptions listed in the Southeast Region Trade and Dislocated Worker Referral Policy and Process.
- The Southeast Board holds a contract for SkillUP services through Family Support Division. SkillUP participants are to be co-enrolled into WIOA for additional support and a safety net in case their benefits or case closes unexpectedly. This ensures that whatever the participant has begun doing, they are able to keep doing even if funds need to shift from SkillUP to WIOA.
- Any other contracts and grants we acquire will have co-enrollment steps, if appropriate.

Co-locating of Youth Case Manager and MWA Case Managers within Job Center has provided strong partnership and convenience for our customers. Partners are invited to the Job Center on a rotating basis to serve in common customers. We have ~~monthly~~ hosted virtual or in-person One-Stop Leadership or other partner meeting that include WIOA partners and other organizations that serve in common customers. Each Job Center brings together partners in their areas, referring customers, keeping all partners informed on what their organization is doing and sharing opportunities to get involved in locally.

In accordance with changes under OWD Issuance 08-2021:

- All appropriate staff, regardless of their employer of record or funding source, must promptly provide Career Services for both WIOA Title I Adult and Dislocated Worker customers, and Title III WP customers. Staff must enroll and provide services in the program in which they are

- funded. These services may be recorded by any staff authorized to utilize the statewide electronic case management system, under the appropriate program providing the service.
- **Mandatory Co-Enrollment Requirements**
 - All job seekers receiving staff-assisted services in a Missouri Job Center (including Youth) must be enrolled in the WP program.
 - Any Missouri Job Center staff can—and should—complete the WP enrollment in the statewide electronic case-management system.
 - WIOA funded staff must complete a WIOA Basic Career enrollment immediately after completing a WP application.
 - Co-enrollment will ensure individuals receive employment services and other services they may be eligible for under the WIOA Title I programs.
 - All TAA participants should be co-enrolled in the WIOA Dislocated Worker program, unless the enrollment is waived by the participant or unless the participant meets one of the exceptions listed in the Southeast Region Trade and Dislocated Worker Referral Policy and Process.
 - The TAA Code of Federal Regulations dictates that all TAA eligible workers must have employment and case management services available, including placement and referrals to supportive services and followup services available through partner programs, to trade-affected workers during training, and after completion of training, and for adversely affected workers on a waiver from training.
 - Co-enrollment will ensure individuals receive the benefits and services they may be eligible for under the TAA and Title I Dislocated Worker programs.
 - Coordination of services and non-duplication through co-enrollment helps Federal resources go further in local areas and provides participants with access to a comprehensive suite of services.
 - All National Dislocated Worker Grant participants must be co-enrolled in the WIOA Dislocated Worker program if they meet the eligibility requirements.
 - Priority of Service for Veterans and Adult Low-Income Policies will still be adhered to even with co-enrollment requirements.
 - Basic, Individualized, and Training Services will be applied to each eligible customer based on the appropriateness and justified based on Program Eligibility and
 - Exit Procedures, Follow-Up Requirements, and Follow-Up Performance Reporting will all be followed according to Federal, State, and Local policies, as applicable.

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Southeast Region Trade and Dislocated Worker Referral Policy and Process

OWD Issuance 03-2019 Co-Enrollment and Provision of Services by Workforce Staff Policy requires that all Trade Participants must be co-enrolled into the WIOA Dislocated Worker Program. In the Southeast Region the Trade Program and Participants are taken care of by Department of Higher Education and Workforce Development Staff Members located in three out of the four Job Centers in the Southeast Region. All WIOA Program and Participants are taken care of by Southeast Workforce Development Board Staff Members located in all four of the Job Centers in the Southeast Region. Due to the different programs and staff members handling these groups of people who will need to be enrolled into both programs, the Southeast Region has developed the following Referral Policy and Process.

This Policy and Process was developed on May 15th 2020 during a conference call that included Department of Higher Education and Workforce Development Supervisors, Southeast Workforce Development Board Administrative Staff and Southeast Workforce Development Board Program Staff.

Please Note – While the OWD Policy does state ALL Trade Program Participants must be co-enrolled into the WIOA Dislocated Worker Program, there are some exceptions to this rule. Some exceptions are highlighted in the FAQ that is posted with the OWD Issuance 03-2019 and include but is not limited to:

- Trade Participants who do not live within the Southeast Region's 13 counties will not be Co-Enrolled into the WIOA Dislocated Worker Program for the Southeast Region.
- Trade Participants who are enrolled for the purpose of attending a training program not ETPS/WIOA approved or not approved by the Local Board, would not require a Dislocated Worker Co-Enrollment
- If a Trade Participant was enrolled/served prior to 7/29/2019, before the policy was effective, they did not require the WIOA Dislocated Worker Program Co-Enrollment.
- Even with these exceptions, WIOA Staff Members and DHEWD Staff members are still required to work together, coordinate information, and send electronic referral notices. Any participant who meets one of these exceptions must have a case note entered on their account by a WIOA Staff Member stating why the WIOA Dislocated Worker Enrollment was not completed.

Local Policy requires a separate hard copy file to be maintained for Trade and Dislocated Worker Enrollments. Documents and updates on progress for the participant can be shared between the two programs and appropriate program staff members.

Trade and DW Referral Process/Guidelines:

- This should be presented to the participant as a step in the process and not as an option due to requirements in OWD Policy.
- The official referral notification will be made through email so there is an electronically documented trail for each referral. The Trade Staff Member will send an E-mail to the WIOA Staff Member to notify them of the requirement for the dual enrollment along with any other applicable information including appointment time and date, eligibility summary, and training/employment service plans, possible WIOA program needs, etc.

- When a new Trade Enrollment Appointment is being set, the Trade representative will work with the appropriate WIOA staff member to coordinating the time and date of the enrollments so that both Trade and WIOA enrollments can be completed during the Job Center visit. The focus is on serving the customer in the most efficient way possible and whenever possible, avoid requiring the participant to make multiple office visits and/or submit documentation requests.
- When this is not possible, an appointment should be made with the Trade Participant during the enrollment or as soon as possible after the enrollment so that they can return to complete the required WIOA enrollment.
- The Cape Girardeau Job Center currently does not have a Trade Staff Member on-site. This is the only Job Center in the Southeast Region without a Trade Representative. If there is a need for a Trade Program Enrollment in Cape, arrangements will be made between the Sikeston DHEWD Supervisor and the Cape Girardeau Job Center Lead and/or Staff Members to coordinate a scheduling time that works for all parties. The Southeast WDB Conference Room can be used for additional space, if needed.
- Beyond general eligibility and/or program orientation information, Trade staff should not tell participants what WIOA staff or the program can or cannot do. WIOA Staff Members should not tell participants what Trade staff of the program can or cannot do. As each program and staff member enrolls and screens these participants both programs will assist them with anything eligible and appropriate. Programs and policies are different between the programs and we want to ensure each customer is only given the appropriate information by the staff member who has been trained to operate and provide services within the program they have been assigned.
- The assigned Case Manager from the program that is funding the training and/or employment service will be considered the Priority Case Manager and will be responsible for monthly contact and updates on progress. Any services/funding provided by the non-priority program will be documented through the MoJobs system and case notes and will be the responsibility of the non-priority assigned Case Manager.
- When referring a participant to the WIOA program, along with the e-mail notification to the appropriate staff member, make sure the 136 – Referred to WIOA Services Activity is posted to the MoJobs Account.
- While this policy is specifically set for Trade and Dislocated Worker Co-Enrollment, RESEA is an automatic qualifier for the WIOA Dislocated Worker Program. The Southeast Workforce Development Board **strongly** encourages RESEA referrals to be made to the Dislocated Worker Program. These referrals would follow the same process and email documentation as Trade and DW Referrals.

Effective August 2020