



Department of
**Labor & Workforce
Development**

Case Management & Co-enrollment

Session Goals

- Define Case Management
- Outline effective case management
- Establish understanding of co-enrollment
- Expel common myths of co-enrollment
- Establish understanding of how to record co-enrollment



Case Management

What is Case Management

- **Case management is defined as wraparound services that motivate and support participants' progression towards self-sufficiency.**

Career Coach vs Life Coach

As Career Coach/Specialist,

- our focus should be on what the participant needs to succeed with their **employment goal**.
- Any issues that need to be addressed **before** the participant can focus on an employment goal should result in a referral to a professional who can address the issues that the participant is dealing with.
- Being a career coach/specialist does not qualify us to be a “life coach.”

Case management: Documentation

Ensure that all required paperwork and documentation are uploaded into Jobs4tn to support the services that you have provided to the customer. In order to case manage participants, Jobs4tn **must** be used to:

- Create participant applications
- Record provided services
- Upload supporting documentation to verify eligibility
- Provide case notes regarding interactions with participants.

Effective Case Management

Career specialists:

- Assess and triage participant needs
- Advise on current employment opportunities, growing industries in the area, and training options
- Provide career guidance

Case management should be participant-centered and focused on giving the customer the tools that are needed to become self-sufficient.

Effective Case Management: Organization

Develop a system of time management - use what works best for you.

- If you wait until several days after you have spoken with a customer, will you remember everything that you talked about when you case note?
- If you are rushed and feel overwhelmed, will you be at your best when you are meeting with a new customer to determine their needs?

Effective Case Management: Empathize

- Listen to understand instead of listening to respond.
- When communicating with your participants, remember that they are going through a stressful part of their life.
- Stay in touch with your participants - if they do not think that you care about what happens to them, contact could be lost.



Co-enrollment

What is co-enrollment and why should we care?

Co-enrollment:

- **Is** the enrollment of a participant in more than one program at a time.
- **Ensures** that the individual receives the needed support to reduce the probability of drop-out due to barriers.
- **Allows** participants, who are co-enrolled, to have resources leveraged in a way that increases the probability to achieve long-term success.

Co-Enrollment Challenges

**Different
Eligibility and
Service
Requirements**

**Performance
Outcomes**

**Can't
communicate
across
programs to
serve same
participant**

**NO
\$\$\$**

**Coordination
is TOO...
MUCH...
WORK!**



Let's Bust some Myths!

Myth/Barrier

Co-enrollment won't help my program's performance.

BUSTED!

Co-enrollment participant will count in the performance measurements for **all** programs they are enrolled in.

Myths continued...

Myth/Barrier

There is a lack of WIOA funding.

BUSTED!

There are a lot of ways to coordinate co-enrollment that are essentially a no-cost or extremely low cost burden for WIOA programs. (Resume writing workshops, financial literacy, etc.)

Myths continued...

Myth/Barrier

Co-enrollment is participant driven and, if there is no perceived benefit, they will not co-enroll.

BUSTED!

It is for the case manager to identify the needs of the participant and how they can be met across programs. Participation should be seamless for the participant.

Myths continued...

Myth/Barrier

Having to see multiple case managers creates a burden for the participant.

BUSTED!

Challenges to infrastructure should not determine case management strategies. Bridge the Gap – create case staffing between both case managers to provide a seamless service delivery.

Co-enrollment is not...

- It is not a means to duplicate services
- It is not a means to “pass off” responsibilities

A Day in the Life of a Participant

- **Tiffany Evans –**



- 22 years old
 - Parenting
 - Employed - \$7.25/hr.
 - part-time (20 hr./wk.)
 - Receiving SNAP
- Tiffany is not sure what service she can receive, she just knows she hates her current job and needs more money.

Leveraging Resources

TAA/Title I Dislocated Worker/SNAP co-enrollment:

- While TAA focuses on the training that is needed for a participant to be self-sufficient, SNAP benefits can also assist with transportation and child care (which is a new development) to support the he/she through training.
- Blending all three programs (TAA, SNAP and Title 1 Dislocated Worker) can be beneficial to the participant - when one program may not be able to provide for his/her needs, the other programs may be able to assist.

Co-enrollment in VOS

So, how do we ensure that our efforts are documented in the Case Management System?

Co-enrollment in VOS

Step 1: Go to the Program application you are enrolling the individual in.

Title I - Workforce Development (WIOA)

Apps: 1

[Create Title I - Workforce Development \(WIOA\) Application](#)



[WIOA #400643034 - Complete](#)

LWDB:	73 - Southeast Tennessee	Application Date	02/01/2018
Onestop:	660 - American Job Center - Dayton * NEW *	Participation Date:	02/01/2018
		Closure Date:	N/A
Open/Total Activities:	4 / 14	Exit Date:	N/A

Co-enrollment in VOS

Step 2: Expand the application. Find Partner Programs tab.

+ Eligibility Summary	
+ Participation	02/01/2018
+ Activities / Enrollments / Services	14
+ Measurable Skills Gain	3
+ Partner Programs	0

[Add/Edit Partner Programs](#)

+ Literacy & Numeracy	0
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Co-enrollment in VOS

This is the list of Partner Programs within this section that apply to TN currently.

- Homeless Veterans' Reintegration Program
- Job Corps
- Other WIOA or non-WIOA Programs (Not in VOS)
- Employment First State Leadership Mentoring Program (EFSLMP)
- Intellectual and/or Developmental Disability Program
- Mental Health Program
- Reintegration of Ex-Offenders (Adult & Youth) Program
- Senior Community Service Employment Program (SCSEP)
- Vocational Education (Carl Perkins Vocational and Applied Technology Education Act)
- Vocational Rehabilitation and Employment (VR & E) Services (Veteran's VR)
- Vocational Rehabilitation Services (Parts A and B of the Rehabilitation Act of 1973)
- YouthBuild

Co-enrollment in VOS

Step 3: Click the Add/Edit Partner Programs link.

⊕ Activities / Enrollments / Services	28
⊕ Measurable Skills Gain	1
⊖ Partner Programs	0
Add/Edit Partner Programs	
⊕ Literacy & Numeracy	0
⊕ Youth Goals	0
⊕ Credentials	2
⊕ Add Employment	1

Co-enrollment in VOS

Step 4: Go to the section and complete the appropriate partner program applicable information.

Partner Programs

Please indicate if the individual received services from the following partner programs during program participation.

H-1B Funded Program:

☐ Yes ☒ No ☐ Participant did not self-identify

**H-1B Funded Program Grant
Number** *(If unknown, enter all 9s.):*

Format: AA-99999-99-99-A-99

**Homeless Veterans' Reintegration
Program:**

☐ Yes ☒ No ☐ Participant did not self-identify

**Homeless Veterans' Reintegration
Program Grantee:**

Format: 99999

**Indian and Native American (INA)
Programs:**

☐ Yes ☒ No ☐ Participant did not self-identify

**Indian and Native American
Programs Grant Number** *(If
unknown, enter all 9s.):*

Format: AA-99999-99-99-A-99

Effective Case Management Data Capture

No Activities,

- participation never happened
- performance outcomes will be null
- Program funds could be cut,

Effective Case Management: Activity Dates

Pay attention to activity dates - System closures of **all** activities result in the case file **exiting before** we are done assisting the participant.

- Projected Start Date
- Actual Start Date
- Projected End Date

Activity Dates cont. ...

System closures of all activities result in the case file exiting

Menu

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Title I - Workforce Development (WIOA) Apps: 1

[Create Title I - Workforce Development \(WIOA\) Application](#)

WIOA : [redacted] - Case Exited

LWDB:	[redacted]	Application Date	06/07/2017
Onestop:	[redacted]	Participation Date:	06/07/2017
	[redacted]	Closure Date:	06/07/2017
Open/Total Activities:	0 / 6	Exit Date:	06/07/2017

Activity Dates cont. ...

Actual begin dates must be entered or activity will System Close

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	300 - Occupational Skills Training - Approved Provider List (ITA)		Adult	10/16/2017	N/A	01/31/2018	10/16/2017 System Closed
	102 - Initial Assessment		Adult	05/09/2017	05/09/2017	05/09/2017	05/09/2017

Activity Dates cont. ...



Projected End Dates may be extended.



March 5, 2018

To Whom It May Concern:

[REDACTED] has turned in all required documentation and is set to start classes. He is scheduled to begin classes for the CDL program on March 19, 2018. The classes will end on April 30, 2018. The cost of the program is \$2900. If you have any questions, please feel free to contact me at [REDACTED].

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	205 - Develop Service Strategies (IEP/ISS/EDP)		Adult	03/19/2018	03/19/2018	07/30/2018	Close
	102 - Initial Assessment		Adult	03/19/2018	03/01/2018	05/01/2018	05/01/2018 Successful Completion
	300 - Occupational Skills Training - Approved Provider List (ITA) VATTEROTT CAREER COLLEGE		Adult	03/19/2018	03/19/2018	07/30/2018	Close

Activity Dates cont. ...

		Grant	Begin Date	Begin Date	End Date	Date
	211 - Referred To WIOA Partner Program (AE, TAA, VR or WIA Title I) Tennessee Dept of Labor and Workforce	 TAA	N/A	07/18/2017	07/18/2017	07/18/2017 Successful Completion
	331 - TAA - Approved Travel in Training Tennessee Department of Labor	 TAA	09/05/2017	09/05/2017	04/23/2019	Close
	300 - Occupational Skills Training - Approved Provider List (ITA) TENNESSEE COLLEGE OF APPLIED TECHNOLOGY AT PULASKI (EAST COL	 TAA	09/05/2017	09/05/2017	04/23/2019	Close
	205 - Develop Service Strategies (IEP/ISS/EDP) Tennessee Dept of Labor and Workforce	 TAA	07/13/2017	07/13/2017	06/30/2019	Close
	125 - Job Search/Placement Asst., inc. Career Counseling Tennessee Dept of Labor and Workforce	 TAA	07/13/2017	07/13/2017	07/13/2017	07/13/2017 Successful Completion
	110 - Attended Rapid Response Tennessee Dept of Labor and Workforce	 TAA	07/13/2017	07/13/2017	07/13/2017	07/13/2017 Successful Completion
	107 - Provision Of Labor Market Research Tennessee Dept of Labor and Workforce	 TAA	07/13/2017	07/13/2017	07/13/2017	07/13/2017 Successful Completion
	102 - Initial Assessment Tennessee Dept of Labor and Workforce	 TAA	07/13/2017	07/13/2017	12/30/2018	07/13/2017 Successful Completion

Activity Dates cont. ...

Activity dates must match the supporting documentation.

- Eligibility documents
- Case notes
- Training documentation
- Credentials



