# IWDS Transition Local Discovery Agenda

## December 5, 2023

**Attendance:**

SIU: Lynette T., Olivia M., Al M., Taylor L., Natasha T.,

DCEO: Mike B., Michelle C., Kelly L., Mark S., Lisa J., Patti S., Lora D.,

LWIA: Ashannti Ross, Thaddeus Zychowski, Julia Montanez, Allyson Saxton, Lori L. Warren, Crystle Adams, Toriana Rhone, Brian Hensgen, Monik Patterson, Dawn Lutz, Rory Callaghan, Paul Andrews, Kristi Chevali, Robert Trapp, Mike Haptonstahl, Chris Casey,

Missing: Dan White, Tamika C., Annamarie D., John B., Mark B.,

**Key:**

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| Overview text | Past Notes | Notes from Current meeting | Action Needed - Overdue |

## Agenda

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| Topic | Notes | Due Date & Person Responsible | Attachments |
| Welcome | Introductions & Welcome |  |  |
| Customer Flow & Local Policy and Procedures | * Introductions, explanation of discovery, purpose, and objectives
* Review Customer Flow, Diagram techniques, Discovery Process
* Review Milestones, Epics, Features
* Introduce Next Steps of Discovery Process – Page Transition, Data Collection, and identification of User Stories
* Show project webpages where we find links to recordings and resources

Notes:**December 5, 2023****Reviewing Definitions Flow Miro Board:**Paul (LWIA 3) – We have a different person who starts with the customer, once the customer is at the Inquirant stage they are passed off to the Career Planner to be certified.* When an individual comes in to use self services, we create a customer record so that we can track them in the system. They are not required to submit any documentation. This does create an issue as it can cause several duplicates in the system. These individuals aren’t given a PII which can cause the duplicates.

Ashannti (LWIA 1) – Similar process to Paul.Toriana (LWIA 17) – Similar process to Paul.* When a customer comes into the center we have a system called AJC integrate which tracks basic information such as customer name and why they are here however this is all self reported information and not confirmed via documentation collection.

Thaddeus (LWIA 6) – In most scenarios, the original Career Planner starts the app and also certifies the application.* Also uses a sign in sheet for self services.

Allyson (LWIA 11) – Has a smaller office, Career Planner does both, starts the app, and certifies it.* Our biggest issue is collecting PII information from those seeking self service. Often they then don't get reported as a result.

Robert (LWIA 1) – Every employee knows how to complete/certify every type of application in LWIA 1.Dawn (LWIA 21) – Their LWIA has one Career Planner per county and that Career Planner works with each customer from start to finish.* Although we have recently started doing meetings where we go over each applicant to see about eligibility before we enroll.
* We have a sign in sheet, with Name, phone #, email address and zip code. Then we add to system. So then yes there ends up being more duplicates.

Kristi (LWIA 7) – Here at LWIA 7 we have different staff doing different parts of the application. So each agency does something different. Some do start to finish. Some do only eligibility up to the applicant and someone else will add the enrolling service.Julia (LWIA 7) – LWIA 7 does not use Career Connect to track universal services. It is seldomly used or not a usual practice. There's more to the process than a simple DOB and SSN change because of the API.Lori (LWIA 13) – When a customer comes in, they will issue them a swipe card # and will use that as their PII. When they come back in, they can be searched by this number and helps stops duplicates. The swipe card # is generated in IWDS.Question: What percentage of individuals provide an email address?* LWIA 1: Majority do have an email address but they don't always remember the password.
* LWIA 11: Most often people have one; they can't always get into it though.
* LWIA 21: More than 90%. If they don’t have an email, we help them set one up.
* LWIA 7: Majority of customers have email addresses. We do not use email addresses to identify customers, we use a customer ID. The customer ID is created when the customer profile is created. This is helpful to identify or correct duplicates within Career Connect.

Career Connect has the capability to merge accounts in the system if they have a different name (ie. They got married/divorced) but have the same DOB and/or SSN.* If a customer has a different last name because they got married, LWIA 1 has the capability to change the name in the system to reflect the new name instead of creating a second account and eventually merging them.

Question: What do you do when a customer comes through the front door for the first time?* Paul (LWIA 3) – They have a front desk navigator who works with a customer to determine what they need to do. If they need self services, they will be sent to the career center. If they need training, they would go to pre-enrollment. Would get more info on what they want training on and then funneled into a specific program. They would fill out a specific form to collect information to get them into the system. This isn’t universal across the state but most LWIAs likely have a similar form or process.
* Rory (LWIA 6) – Some LWIAs ask first-time workNet/AJC visitors to complete a short survey about their needs, and then it helps us determine which agency partner we could refer them to, and then we go from there. This survey is available on their website, it is not an IWDS form.
* Ashannti (LWIA 1) – If a customer walks in our resource room staff will ask what services they need. If they are interested in one of the self-services they are assisted with that, but if they are interested in an enrolled service (training or paid work experience) the customer is referred to our virtual application. The customer completing the online application indicates their interest.
* Julia (LWIA 7) – In most cases a customer profile isn't created until the Applicant stage. By then, a customer would have attended an Orientation for the WIOA program. All customer information is collected in the local WIOA application given in an orientation.
* Toriana (LWIA 17) – Customer completes a pre-application and some sort of orientation (if they are not pursuing self services) before they are entered into the system as an Inquirant.
* Lori (LWIA 13) & Robert (LWIA 1) – Customer must complete an information session and complete an information packet before they are even able to meet with a Career Planner. This is important to ensure that the customer knows what they are getting into before completing an IWDS application.
* Dawn (LWIA 21) – Customer comes in. Tells what they need. Have them Sign in. Go over our resources and training information and then get them to where they need to be and always hand them our pre-application, to fill out if wanting training or OJT or Work Experience or if they would like to share with someone else.

Something that was recently rolled out earlier this year in Career Connect is that a partial profile can be created as well. This idea may or not be helpful for future discussions.There are now three non-enrolling services (called pre-enrollment activities for 1Y) that must be entered before an active enrolling service can be entered. * Non-enrolling vs enrolling services will need to be a flag/tag on the service management tool where we store the list of services the career planners are able to use.

Question: What assessments are completed after a customer is certified?* The bulk of assessments are actually completed before certification.
	+ i.e – interest assessments, needs assessments, skill assessments
* Some assessments that are related to specific programs are completed after certification.
* There are specific screens in IWDS that record assessments before certification. The assessment summary screen can be used before certification.
* LWIA 1: Our initial assessments are for individuals interested in training and part of their requirements and are done prior to certification. Those assessments include Financial Literacy Assessment, Interest Profiler, TABE, Basic Skills Screening Tool, and Digital Literacy Assessment.
* CASAS and TABE can only be entered once an application has been started, but it doesn’t have to be certified.

Paul (LWIA 3) – Their IEP/ISS is tied to their comprehensive assessments. They use the assessments completed before the application to fill in the gaps.There has been a request for years for the state (DCEO) to create a universal IEP/ISS that all LWIAs can use but this request has never been completed. Due to this, all LWIAs have their own IEP/ISS.* Most locally-developed IEPs are probably similar in format and content.

Career Connect has two different roles of individuals who can work with the customer (there are 22 different roles, but these are the main two):1. Career Coach/Career Planner
2. Business Services Rep – Staff Accounts

**Questions to Consider:**Why are we keeping Inquirant records in the IWDS system who never move forward to the application stage if they are inactive for longer than 6 months? Can this process be changed/edited in the new system?* Kelly L – Also, yes, valid point on length of time to keep inquires in the system and while basic career services aren't part of performance- DCEO does report these efforts to DOL. This can also serve as a recruitment/follow-up strategy that can drive potential enrollment for LWIAs.

From Kelly L - Would an IwN customer ID be one multi-identification factor? Along w/ DOB, SSN, to make matches between programs and avoid duplicate entries?We need to clarify and then determine at what point we collect and enter certain types of data from the customer? * We also want to ensure that we can record and track the number of those who are utilizing self services, who only needs resume help or needs to attend a workshop, and who will move forward to complete a WIOA/Trade application.

Will the new system have a way to delete/edit assessments? A customer might come back later and want to complete updated assessments. | Email Taylor any version of paper and/or google intake form/survey – Due 12/7/23Email Taylor a copy of your local IEP/ISS – Due 12/7/23 | [Miro Board](https://miro.com/app/board/uXjVNWruFQk%3D/) |
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| Future Agenda Items |
| Define Feature Sets |  |  |  |
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| Reference Notes |
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| Archived/Completed Agenda Items |
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