



**TECHNICAL ASSISTANCE - #TA-03-2020**

**TO:** Chief Local Elected Officials  
Workforce Development Board Chairs  
Workforce Development Board Staff  
WIOA Service Providers

**FROM:** Don Morris, Executive Director

**DATE:** July 6, 2020

**SUBJECT:** Occupational Skills Training Service Status Definitions and Reporting Accuracy

**PURPOSE:** The Oklahoma Office of Workforce Development (OOWD), as the Governor's chosen Workforce Innovation and Opportunity Act (WIOA) administrative entity, provides this technical assistance to the local workforce development areas to ensure appropriate Service Status entries for individuals determined eligible to participate in Occupational Skills Training (OST) under the Title I Adult, Dislocated Worker, and Out-of-School Youth (OSY) programs.

**MESSAGE:** Under WIOA, occupational skills training may be provided to individuals in need of training services to obtain or retain employment. WIOA participants enrolled in OST funded by the WIOA title I Adult and Dislocated Worker are counted for performance accountability purposes. OST Service Status definitions and instructions for entering the correct Service Status to ensure performance accountability is found below.

**OCCUPATIONAL SKILLS TRAINING SERVICE STATUS DEFINITIONS:**

**Completed:** The participant completed the training program (i.e., did not withdraw or transfer out).

**Exited without Completing:** The participant started the training program but withdrew, transferred out of the program, or otherwise stopped attending training prior to completion. Please note that the exit pertains to the Service Status, not Program Exit.

**Exited, Funding Source Changed:** Please note that Exit pertains to the Service Status, not Program Exit.

**Exited, Grant Ended:** Please note that Exit pertains to the Service Status, not Program Exit.

**Exited, Program Year Ended:** Please note that the exit pertains to the Service Status, not Program Exit.



**Failed to Report:** The individual was scheduled for training did not attend any part of the training program, and did not reschedule with the training provider and WIOA case manager.

**In Progress:** The participant met the requirements for entry into the training program and is currently in the approved training program.

**Proposed:** The participant has requested training and the request is documented in the Individual Employment Plan (IEP). Eligibility for the requested training is pending, including the approval of the Individual Training Account (ITA).

**Rescheduled:** Approved training has been rescheduled by the training provider or is due to the participant's unforeseen circumstances. This status may also be appropriate when an ITA is pending due to the loss of previously available funding from a partner entity.

**Scheduled:** Training has been approved, the funding source has been determined, and the start date has been determined and is documented in the IEP.

**Unsuccessful Completion:** The participant completed the training program but failed to take the required knowledge based exam or other completion test necessary to obtain a credential, or did not achieve passing scores on the exam or licensing requirement to obtain the required credential.

It is important to note that credential is defined in TEGL 15-10 Attachment 2: Credential Reference Guide follows: Within the context of education, workforce development, and employment and training for the labor market, the term credential refers to a verification of qualification or competence issued to an individual by a third party with the relevant authority or jurisdiction to issue such credentials (such as an accredited educational institution, an industry recognized association, or an occupational association or professional society).

**INSTRUCTIONS:** OOWD received requests for technical assistance regarding Proposed or Scheduled services that the participant never began, regardless of the reason (e.g., the program did not make, the student's IEP changed, etc.).

Deleting the training service or changing the Service Status to Failed to Report are the only viable options that maintain data integrity and do not negatively affect performance. Please refer to the examples below:

#### **Rescheduled OST**

Appropriate reasons to reschedule could include the school changing the program start date or the student having a valid reason to reschedule.

**Example 1:** The OST Service Status shows training is scheduled to start 07/13/2020 and the training provider pushed the start date to two weeks later.

- Change the Service Status to **Rescheduled** and enter the date provided by the school, 07/27/2020.
- On the actual start date enter the date and change the Service Status to **In Progress**.
- The IEP and/or program notes should be updated accordingly.

**Example 2:** The OST date is rescheduled because the provider canceled the training program due to lack of enrollment. The program will be offered in the following semester.

- The status should be changed to **Rescheduled** and the new, anticipated start date must be entered.
- Be sure the participant understands that they will need to *actively participate* in other appropriate services to prevent WIOA exit, particularly those that are related to, or those that will help the participant achieve, their training and/or employment goals, such as the individualized career services described in §678.430(b)(6)-(9). These services must be entered into the Service and Training plan (S&T).
- Change the OST status to **In Progress** on the date the participant began training
- The IEP and/or program notes should be updated accordingly.

**Example 3:** The participant notifies the case manager *in advance of the scheduled date* that they will be not be attending the training that is entered into the S&T as **Proposed** or **Scheduled**.

- A valid reason for the change in plan must be documented in the IEP.
- The Service Provider must put in a Zen desk ticket requesting that the service be deleted. Please note that the request must be made in accordance with OWDI XX-20XX.
- Enter a program note to document actions.

**Example 4:** The training provider informs the case manager that the participant did not start **Scheduled** training.

- Change the training Service Status to **Failed to Report**.
- Update the IEP and enter a program note.

**Example 5:** The participant failed to notify the school or the case manager *in advance of the planned start date* that they did not start their **Scheduled** training. The cutoff date for program entrance has passed and the participant does not have a valid reason for the delay in reporting the failure to attend the training.

- **Failed to Report** is the correct Service Status.

**Example 6:** This example applies to situations such as natural disasters or the current COVID-19 Pandemic.

- If an alternate plan is provided by the training provider for continued training, no change in the Service Status is required.
- When there is a break in the training, the situation must be addressed in the IEP and appropriate individualized career services must be provided and documented. The service status may remain **In Progress**. Update the IEP and enter a program note.
- For a training gap that approaches 90 days, it is imperative that appropriate individualized career services are provided, documented in the IEP, and entered into the S&T to prevent Program Exit. The service status may remain **In Progress**.

Please note that program notes should always be entered to record case management details.

**EQUAL OPPORTUNITY AND NONDISCRIMINATION STATEMENT:** All Recipients, and Sub-recipients/Sub-grantees must comply with WIOA's Equal Opportunity and Nondiscrimination provisions which prohibit discrimination on the basis of race, color, religion, sex (including pregnancy, childbirth, and related medical conditions, transgender status, and gender identity), national origin (including limited English proficiency), age, disability, political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship status or participation in a WIOA Title-I financially assisted program or activity.

**ACTION REQUIRED:** This Oklahoma Workforce Development Issuance (OWDI) is to become a part of your permanent records and made available to appropriate staff and sub-recipients.

**INQUIRIES:** [If you have any questions about this issuance, please contact Staff in the Oklahoma Office of Workforce Development. Contact information can be found at http://www.oklahomaworks.gov/about/.](http://www.oklahomaworks.gov/about/)