

INSTRUCTION LETTER

INSTRUCTION NUMBER: 17-04

TO: All Grantees

SUBJECT: Wagner-Peyser Reporting Requirements and Activity Codes

DATE	DATE	DATE
ISSUED: <u>October 24, 2017</u>	EFFECTIVE: <u>Immediately</u>	EXPIRES: <u>Indefinitely</u>

PURPOSE: The purpose of this guidance is to clarify the difference between a reportable individual and a participant in Wagner-Peyser (WP) for federal reporting purposes.

BACKGROUND: WP services are available to any person who wishes to access them without regard to eligibility, employment or income status. Previously, any engagement with the labor exchange system and/or WP staff (e.g. using SCWOS to look for work, receipt of basic information from staff, or referrals to partners or services) would make an individual a WP participant. The Workforce Innovation and Opportunity Act (WIOA) now requires States to collect information and report individuals based on their level of engagement with the workforce system. The category of reportable individual allows the Department of Labor (DOL) to identify the individuals who engaged with the workforce development system on an initial level, but who do not receive a significant staff-assisted service that would make them participants. Outcomes of reportable individuals are not included in performance. Only individuals who meet the definition of “participant” are included in performance indicators.

Note: Since Wagner-Peyser staff are not on site in Union for most days of the week, we have asked how individuals will access the services as a ‘participant’. There are several services that may be needed by an individual that require staff assistance by DEW staff. We have asked DEW management if a volunteer may provide these services and be trained by a DEW staff person so all customers have access to all Wagner-Peyser services in Union. Union is the county in our workforce area with the highest unemployment rate and the one most in need of services. We are also copying the DEW management on this instruction letter. We will re-issue an amendment to the letter once we receive solutions from DEW on this issue.

POLICY: WIOA now defines two categories of individuals accessing the workforce system:

- Reportable individual; and
- Participant.

A *Reportable Individual* is one who only uses the self-service system or receives information-only services or activities. *Reportable Individuals* are **not** included in WP performance.

Self-service occurs when individuals independently access any workforce program’s information and activities in either a physical location, such as an SC Works Center, or remotely via the use of electronic technologies. Self-service does not uniformly apply to all virtually accessed services. For example, virtually accessed services that provide a level of support beyond independent job or information seeking on the part of an individual would not qualify as self-service. Information-only services or activities are those that provide readily available information that does not require an assessment by a staff member of the individual’s skills, education or career objectives.

A *Participant* is a reportable individual who receives an individualized career service or a basic career service that is neither self-service nor information-only. Participants are included in WP performance.

WP activity codes are recorded in South Carolina Works Online Services (SCWOS) to track services for reportable individuals and WP participants. The WP activity codes have been revised, to include the addition of the following codes, in accordance with federal reporting requirements:

- 137: WP Initial Assessment;
- 138: Referral to Veterans’ Affairs VR&E Program;
- 139: Staff-Assisted UI Claim Assistance;
- 140: Provision of Financial Aid Eligibility Assistance; and
- 141: Provision of Financial Literacy Services.

Additionally, because the Federal bonding process at the local level is informational and does not require significant staff involvement, WP activity code 124: *Federal Bonding Assistance* will now be entered by State Level staff only. Local staff will continue to distribute the letter and brochure, but will no longer be required to enter an activity for doing so.

When a reportable individual becomes a participant by receiving a significant staff-assisted service, the WP application must be fully completed in order to record accurately the activities. Under new Federal reporting requirements, staff must complete additional demographic data screens in SCWOS to enroll fully an individual in the WP program as a participant. The following activities require significant staff involvement and therefore trigger participation and the additional data collection elements:

105: Job Finding Club	140: Provision of Financial Aid Eligibility Assistance
115: Resume Preparation Assistance	141: Provision of Financial Literacy Services
123: Job Development Attempt/Contact	202: Career Guidance/Planning/Counseling
124: Federal Bonding Assistance (State-Level)	203: Comprehensive Specialized Assessment
126: Tax Credit Certification (State-Level)	204: Testing
137: WP Initial Assessment	205: Development of Individual Employment Plan
139: Staff-Assisted UI Claim Assistance	500-502, 505: Job Referrals (System Set)

ACTION: All grantee staff are to be given a copy of this instruction letter. The Director of each Grantee will meet as soon as possible with their respective staff members to make sure they understand this policy and the revised WP activity codes.

INQUIRIES: Should you have any questions concerning this instruction, please contact Dana Wood at (864) 596-2028 (TTY: 711 or wood@upstateworkforceboard.org).



Ann Angermeier, Director

Source: State Instruction Letter 17-02.