

***WIA***  
***Documenting Service Delivery***  
***&***  
***Customer Contact***

***Definitions & Flowcharts***

**WIA**  
***Documenting Service Delivery & Customer Contact***

***Using These Charts***

**Intent of the Process**

The following flowcharts are meant to provide step-by-step guidance to Training Providers, One Stop Career Centers and the staffs of administrative entities. This guidance has the goal of delineating the respective responsibilities of each organization in the process of delivering a high quality service product that meets the training participant-customer's needs and expectations. The process flow as outlined below ensures that activities that document the delivery of services to training participant-customers are captured in a timely and effective way. This process is designed to ensure that the customer is making substantive progress on goals and that the training program is delivering the expected product. In the event that the outlined activities reveal that the training participant-customer is not making progress or that the training program is not delivering the expected service product, following the process outlined here also ensures that action can be taken to remediate this situation in an effective and time sensitive manner.

**Format**

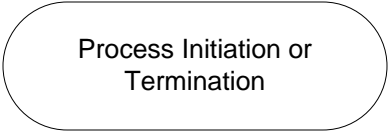
These documents use traditional flowchart symbols and format. A "Guide to Flowchart Symbols" used in these charts follows on page 2. A definition of the Acronyms used in the chart is on page 3. "Notes" to the charts are included as Attachment 1. A sample of the "Trainee Progress Report" referenced in the flowcharts is Attachment 2.

**Explanation of charts**

It is assumed that the steps in the flowchart are self-explanatory. Each flowchart activity box is numbered for discussion/reference purposes.

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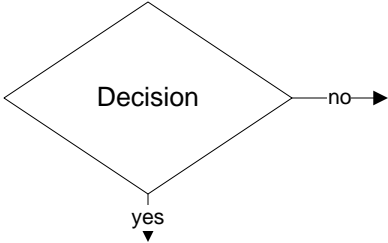
**Guide to Flowchart Symbols**



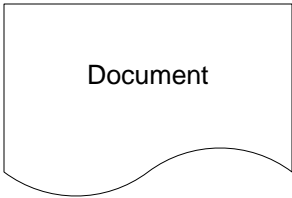
Oblong used to show the beginning or the end of a process.



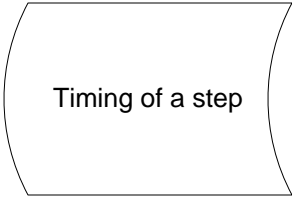
Rectangles used to indicate an action or activity.



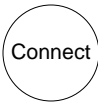
Diamonds used to indicate a decision point. The Decision point is usually framed as a question with actions indicated for "Yes" and "No" answers.



This shape is used to indicate that a document must accompany the step/activity.



This flowchart uses this shape as an alert that a deadline is occurring.



Small circle "connector" is used to indicate that a concurrent or related part of the process continues on another page.

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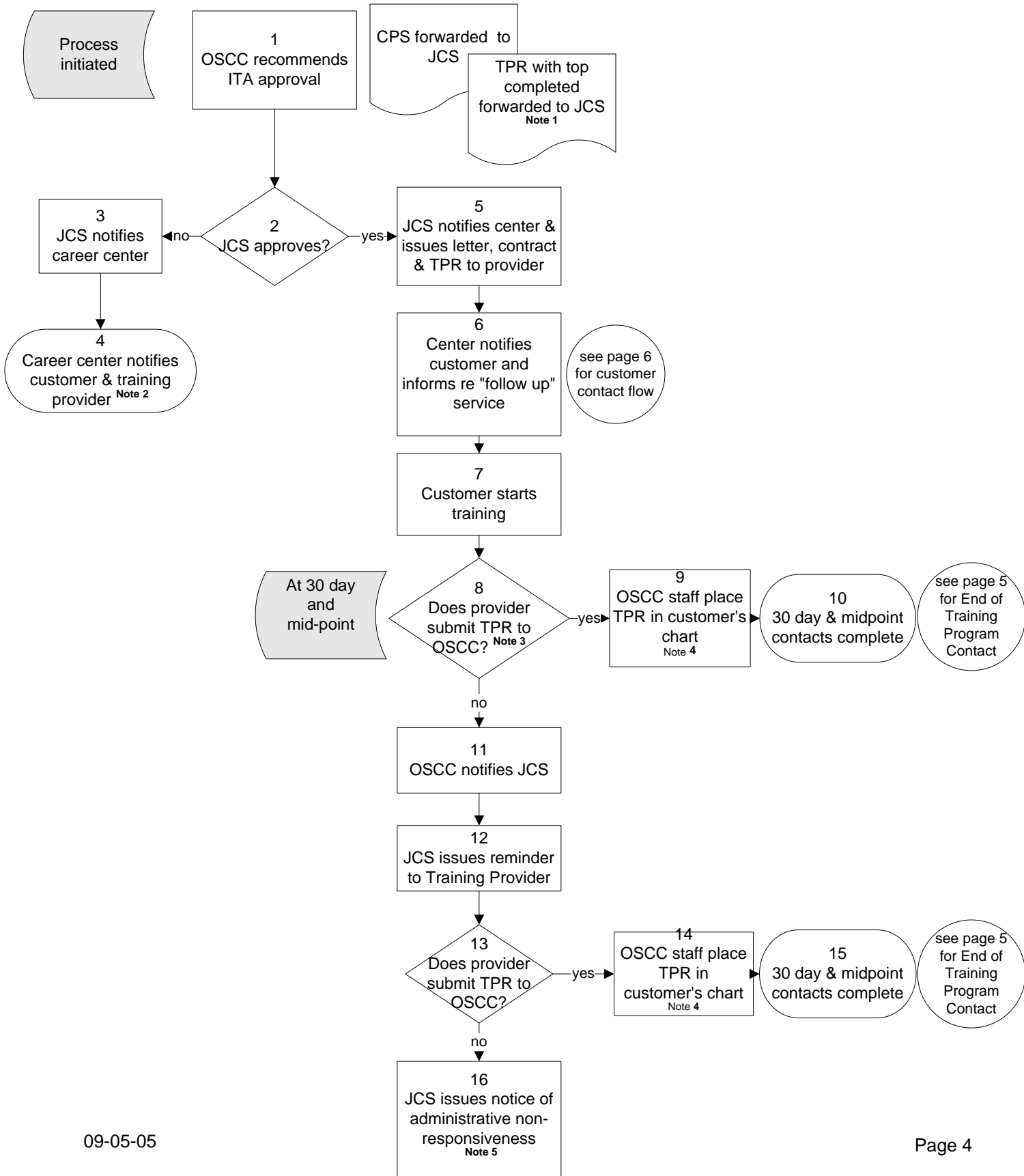
***Flowchart Acronyms***

(In order of appearance in the flowchart)

- WIA**      ***Workforce Investment Act***  
1998 legislation enabling the mechanism of Individual Training Accounts (ITAs) to pay for occupational skills training. Replaced the Job Training Partnership Act (JTPA).
- OSCC**      ***One Stop Career Center***  
Boston's three OSCCs are responsible for conducting an employability assessment that provides the information necessary for the administrative entity (see "JCS" ) to determine if the customer applying for WIA funds through an Individual Training Account is both eligible (i.e., meets income, residence and other guidelines) and appropriate (i.e., needs training to become employed) to receive an ITA.
- CPS**      ***Customer Portfolio Summary***  
Form used in Boston to summarize the information collected in the assessment of the applicant's eligibility and appropriateness for training.
- JCS**      ***Boston Mayor's Office of Jobs & Community Services***  
JCS is the administrative entity (formerly "SDA;" now "Workforce Investment Area") in Boston formally responsible for obligating, expending and monitoring the utilization of federal and state funds for training.
- TPR**      ***Trainee Progress Report***  
Form that must be completed and submitted to OSCC by Training Vendors to document the training participant/customer's progress
- MOSES**      ***Massachusetts One Stop Employment System***  
The state's MIS for documenting delivery of labor exchange and many workforce development services. Developed and administered by the Division of Employment & Training.

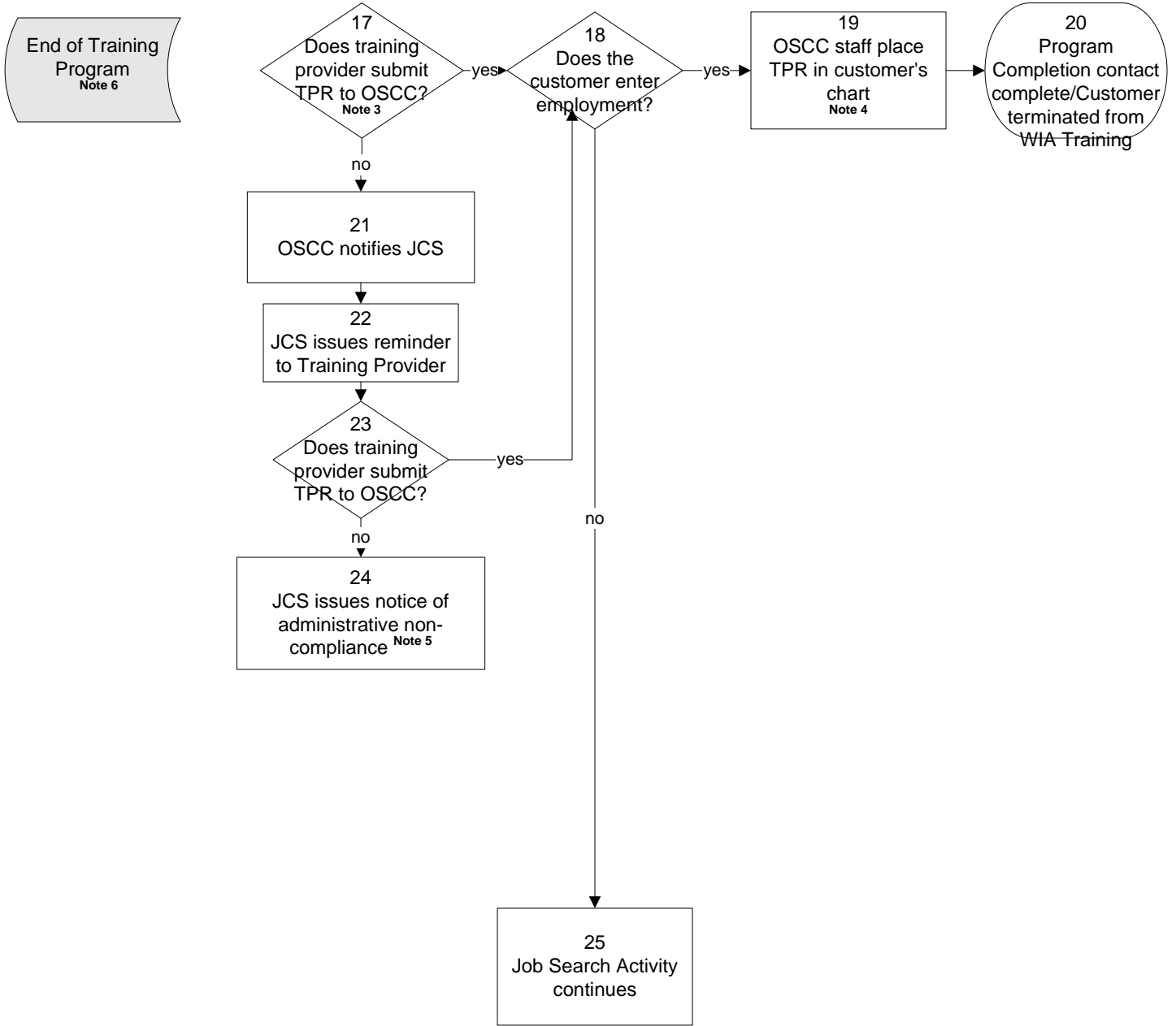
# WIA Documenting Service Delivery & Customer Contact

## Training Provider & One Stop Career Center Flow at 30 Days and Program Mid-point



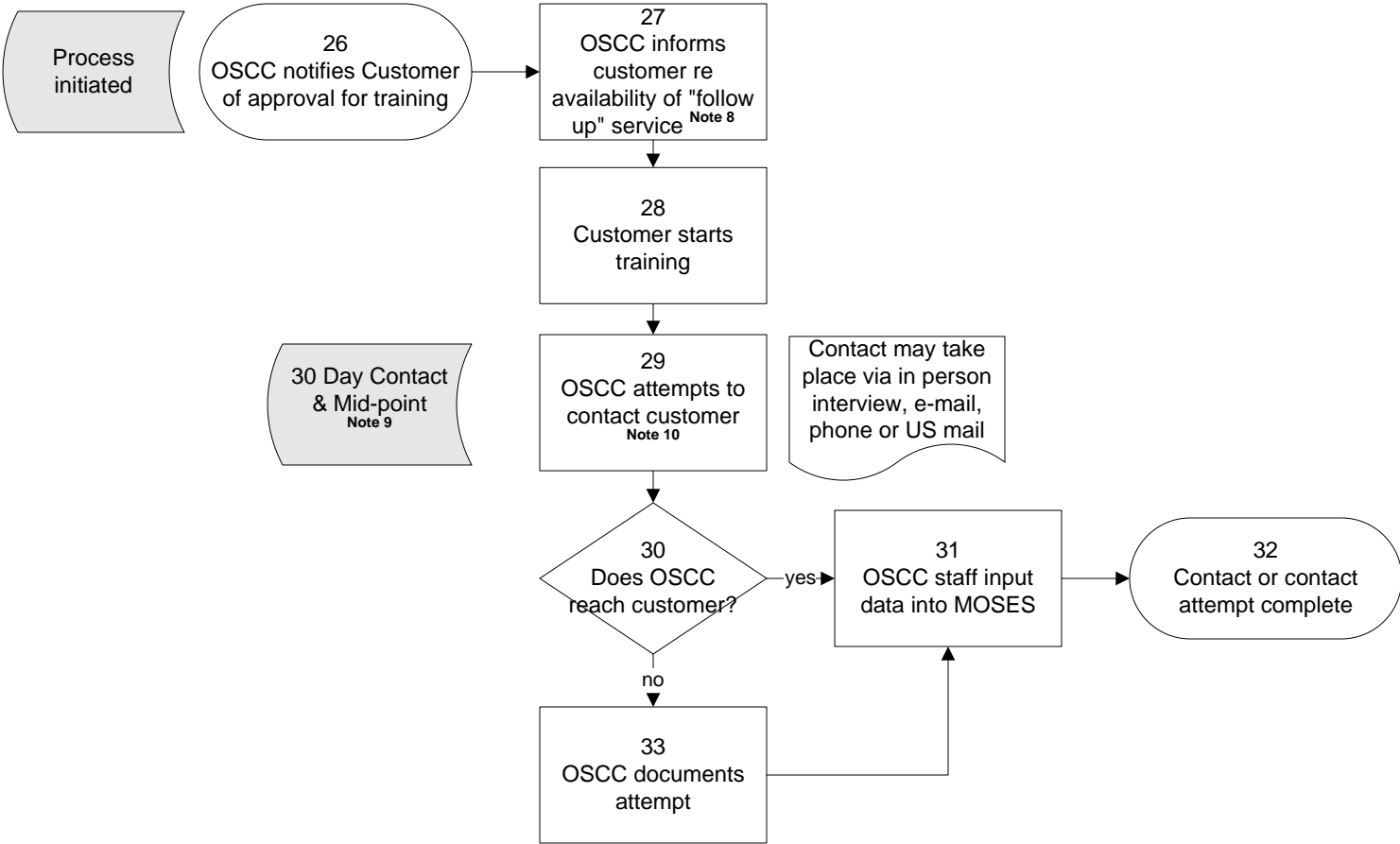
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**Training Provider & One Stop Career Center Flow  
at Program Termination**



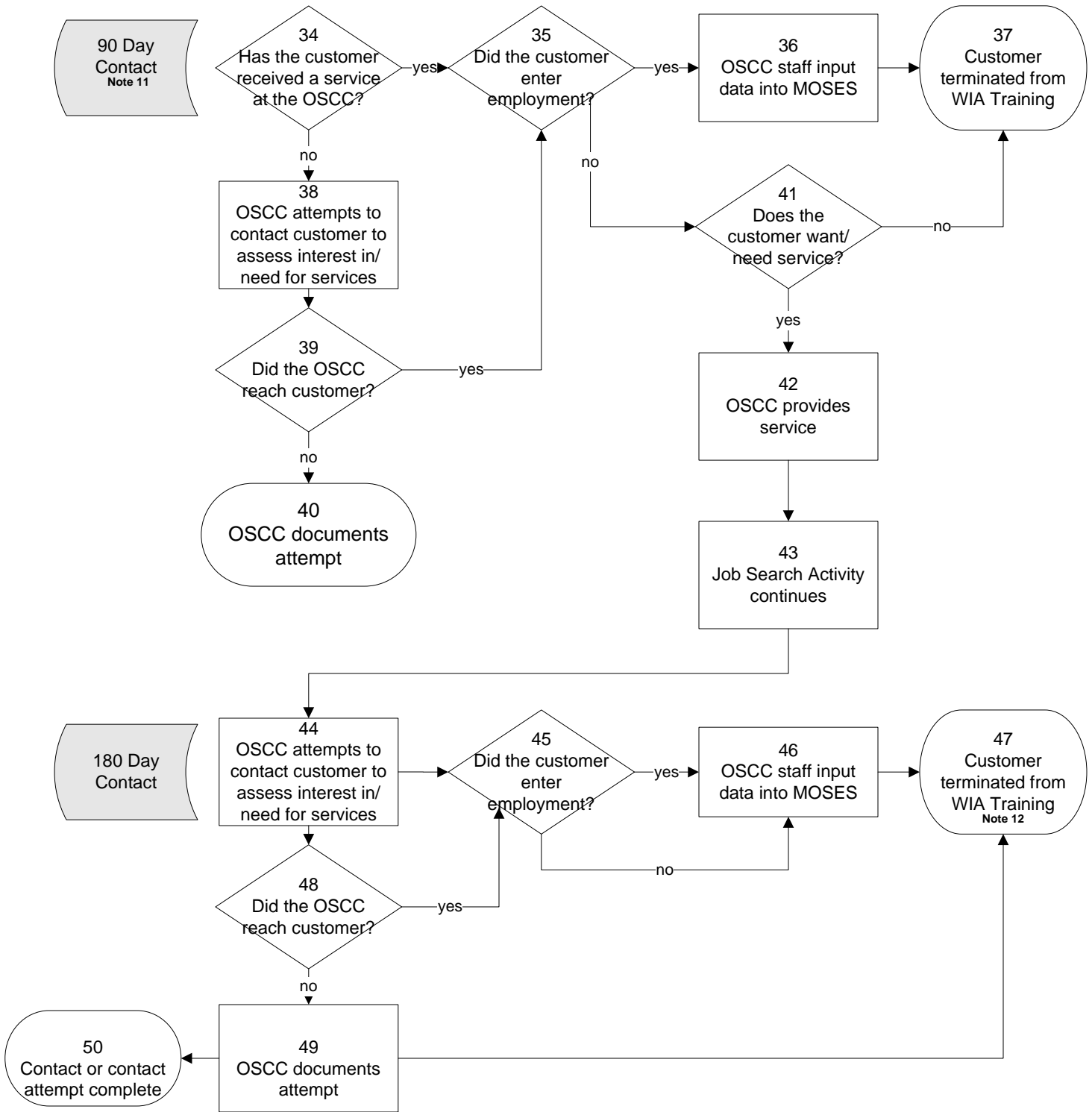
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**Customer Contact Flow<sup>7</sup>**



**WIA**  
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**Customer Contact Flow<sup>7</sup>**



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**Attachment 1: Notes**

**Note 1** (TPR document symbol): Career center counselor notes 30-day, midpoint and program completion dates as deadlines for the submission of the Trainee Progress Report (TPR - Sample is Attachment 2) by the Training Provider. TPR will be forwarded by JCS to Training Provider as part of contract/Participant Individual Training Account (PITA) package. For programs of less than 10 weeks duration, no "mid-point" contact is required.

**Note 2** (Box #4): Training Provider is notified of JCS' denial by career center staff in cases where the career center staff is aware of the training provider as the customer-participant's referral source. This information is best provided to the center by the Training Provider's completion of the first page of the Customer Portfolio Summary (CPS). In cases where the CPS is not available or has not been completed by the training provider when referring the customer-participant to the career center, the customer's report of the source of the referral or phone call by the provider to the career center prior to referral can be the source of information that may trigger OSCC staff to contact Training Providers regarding denial of an ITA. Using the CPS ensures such notification.

**Note 3** (Box #8,13,17): Submission of the TPR is a required activity of the Training Provider. Training Providers will be given a one week grace period to submit the TPR before career center staff notify JCS. Career center staff may choose to remind the Training Provider that the TPR is due, but this is not a required activity of the career center.

**Note 4** (Box #9,14,19): Career center failure to put TPR in customer's chart will appear during program monitoring. Appropriate administrative action will be taken at that time. Staff have the option of entering TPR data in MOSES.

**Note 5** (Box #16,23): If the training provider does not submit the TPR in response to the "reminder" from JCS, JCS will regard the program as administratively non-responsive, endangering the program's status on the Boston Approved Vendor list.

**Note 6** (End of Training Program symbol): The TPR will be completed by the Training Program at the end of the program. It is assumed that the customer-participant is engaged in job search and still largely using the staff and resources of the training program for initial job search support. If at the end of training, or at any point following program completion, the training provider becomes aware that the customer has secured a job, the program should notify the career center .

**Note 7** ("Customer Contact Flow" title box):The "Customer Contact Flow" begins when the career center is notified by JCS of the approval of an ITA for a specific customer. The flowchart box numbering continues from the previous page, but the process described is relatively concurrent with the Training Providers contacts with the OSCC. The goal of customer contact by the OSCC staff is to ascertain, from the customer's point of view, progress on goals and the extent to which the training program is meeting the need and expectations of the customer-participant.

**Note 8** (Box # 27): Once a customer has become a member of a OSCC, s/he may use career center services at any time. However, for customers referred to a training program, with the exception of programs of very short duration, it is assumed that over the course of the customer's participation in the program, it will be the responsibility of the program to provide services that contribute to the customer-participant's continuation and success in the program. As a matter of "best practice", but not as a matter of statute or regulation, career centers may offer to provide ongoing customer contact while a customer is attending a training program.

**Note 9** (30 Day & Midpoint Contact box): The second contact attempt with the customer-participant (the first having occurred after 30 days) may be initiated at the midpoint of the program or at any time between the training program mid-point and the end of the program.

**Note 10** (Box #29) : As a matter of "Best Practice," OSCC counselors have agreed that three attempts to reach the customer-participant are reasonable before documenting inability to contact.

**Note 11**(90 Day Contact box): If the customer remains unemployed for 90 days following program completion and has received no services at a career center, OSCC staff should initiate contact in order to assess whether the customer needs and/or is interested in services.

**Note 12** (Box #47) : If, after 6 months following training, the customer has not found a job, the case will be closed in WIA. The customer continues to be able to use career center services.

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**Attachment 2: Trainee Progress Report**

**TRAINEE PROGRESS REPORT**

Trainee Name: \_\_\_\_\_ Vendor Name: \_\_\_\_\_  
Program Contact: \_\_\_\_\_  
Course Name: \_\_\_\_\_  
Course MOSES ID#: \_\_\_\_\_  
Course Start Date: \_\_\_\_\_  
Course End Date: \_\_\_\_\_  
Career Center: \_\_\_\_\_  
C.C. Counselor: \_\_\_\_\_  
Telephone #: \_\_\_\_\_ Initial Progress Report due: \_\_\_\_\_  
E-mail: \_\_\_\_\_ Midterm Progress Report due: \_\_\_\_\_  
Fax #: \_\_\_\_\_ Completion Report due: \_\_\_\_\_

**Initial Progress Report:**

Attendance: Satisfactory:  Problematic:

Explain problematic:

Progress:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Midterm Progress Report:**

Attendance: Satisfactory:  Problematic:

Explain problematic:

Progress:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Completion Progress Report:**

Completed:  Did not complete

Comments:

Progress in job search and placement:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_