**WIOAB 07-21**

**DATE:** **February 24, 2022**

**TO:** **IDOL WIOA Providers**

**FROM:** **Summer MacDonald, Program Manager** *Summer MacDonald*

**SUBJECT:** **WIOA Participant Records clean up**

Moving carry-in and follow-up participant documents to IdahoWorks was the initial phase in the transition of WIOA participants out of SharePoint/Participant records. The final step is to exit participants in SharePoint/Participant records to permit the system to migrate files to OnBase automatically.

Career planners must continuously review program data for completeness to ensure compliance with WIOAP 01-21, Idaho's MIS Policy, and validate participant data accuracy. Career planners should visit SharePoint/Participant Records, follow the instructions below for each WIOA and NDWG participant, and confirm that all documentation has been uploaded into *IdahoWorks* based on the training provided on July 13, 2021.

**Please complete the activities below before the close of business** <mark>**Tuesday, March 8**</mark>

- Each Participant Record must present the last and first name only, without any other identifiers in front. Career planners are asked to remove any words, letters, etc., before each record's last or first name.

  For example:
    - (F) Parker, Peter should read as Parker, Peter
    - (Youth) Stark, Tony should read as Stark, Tony
    - (Launch) Banner, Bruce should read as Banner, Bruce

- Complete the following for all Adult, Dislocated Worker, Youth, and NDWG participants
    - Check Exit to Follow-up
    - Enter Exit date. **You must use 3/8/2022 for all WIOA participants.**
    - Check Final Exit

| Exit to Follow-Up | ☑ |
|---|---|
| | If Exit is checked, you must enter Exit Date.  If dual enrolled, exited from TAA & WIA? |
| Exit Date | 3/1/2022  📅 |
| | If Exit is checked, you must enter Exit Date |
| Final Exit | ☑ |
| | (Follow-up period after exit has ended; CM indicates all required docs are attached) |

If you have any questions regarding this process, please contact the WIOA/TAA mailbox

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