

WIOA FORMS & DOCUMENTS CHECKLIST

PARTICIPANT NAME:		PART ID:	
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This checklist is designed to help career planners/coaches with documentation required for the electronic file and enrollment/case management activities. In some cases, additional items may be necessary.

WIOA forms are found here: <https://idahoworks.gov/> (must be logged in)

Please use the most current forms available

(After retrieving the form, please "save as" to your personal or shared drive. This will preserve the original, blank form)

- To IW = Uploaded into IdahoWorks
- To Payroll = Copy forwarded to Idaho Dept. of Labor, WIOA Payroll, 317 W. Main St., Boise, ID 83735
- Done = Task is completed

To IW	To Payroll	Done	ENROLLMENT DOCUMENTS
			<u>WIOA 73</u> Verification Record - <i>complete one for each program for which the person is being made eligible. When uploading items in an enrollment packet, place all eligibility items behind the corresponding 73 form</i>
			<u>WIOA-73A</u> Adult Verification Record - with supporting documents
			<u>WIOA-73D</u> Dislocated Worker Verification Record – with supporting documents
			<u>WIOA-73Y</u> Youth Verification Record – with supporting documents
			<u>DD-214</u> <i>(if participant is a veteran)</i>
			<u>Social Security Number</u> <i>(required for any payments made to/on behalf of participant)</i>
			<u>W-9</u> <i>(required for any payments made to participants)</i>
			<u>IDOL-WIOA 130</u> Adult-DW or Youth WIOA Application <i>(if used)</i>
			<u>WIOA-03</u> Release of Information Form
			<u>WIOA-10</u> Information Pamphlet Review with participant, print and give hard copy or send email link to participant, and document in case notes it has been reviewed/provided; or Obtain signature page acknowledging receipt by participant
			<u>WIOA-74C</u> Determining Eligibility for Training Services <i>(only for <u>employed</u> adult and dislocated workers)</i>
			<u>IdahoWorks Signature Page</u> <i>(signed/dated by career planner/coach and applicant) OR</i> <u>Emailed attestation confirmation</u> <i>(Dates must match program enrollment date in IdahoWorks)</i>

To IW	To Payroll	Done	OTHER REQUIRED FORMS/ENROLLMENT ACTIVITIES
			<p>Enter services in <i>IdahoWorks</i></p> <p>Youth <u>must</u> have the following services when initially enrolled:</p> <p>WIOA ORIENTATION ELIGIBILITY DETERMINATION LMI* ASSESSMENT (40) ISS (Individual Service Strategy)**</p> <p><i>*Youth must have at least one of the 14 required elements. LMI is one.</i></p> <p>Adult and Dislocated Worker <u>must</u> have the following services when initially enrolled:</p> <p>WIOA ORIENTATION ELIGIBILITY DETERMINATION LMI INTENSIVE ASSESSMENT ISS (Individual Service Strategy)**</p> <p><i>**ISS service must remain open and in progress throughout the participant's active enrollment</i> <i>**ISS service must be in the S & T plan before entering any training services.</i></p>
			<u>Assessment Test Results</u> - Used to develop the Individual Service Strategy or identify basic skill or other needs
			<u>MSG</u> - Enter Measurable Skills Gain(s) in <i>IdahoWorks</i> for those participating in training activities during each Program Year (<i>See WIOAB 12-19, Change 2 for list of msg-related services</i>)
			<u>MSG Documentation</u> - To support attainment of all Measurable Skills Gains throughout enrollment
			Add participant to local office internal spreadsheets or other systems (if used)
			<u>Diplomas or Certificates</u> - Earned during participation (<i>upload and data enter into IdahoWorks</i>)
			<u>Case Notes</u> – Enter all Case Notes into <i>IdahoWorks</i> (Enrollment Details Page)
			<p><u>Individual Service Strategy:</u></p> <p>Employment Plan into <i>IdahoWorks</i> (Enrollment Details Page) Enter Training Plan into <i>IdahoWorks</i> (if applicable) (Enrollment Details Page)</p>
			<u>WIOA-04 Purchase Agreement</u> (with supporting documentation and case noted for every purchase or reimbursement)
To IW	To Payroll	Done	CLASSROOM TRAINING (OCCUPATIONAL SKILLS TRAINING)
			<u>WIOA-42 Student Financial Aid Transmittal Form</u> or other document(s) for each term of training that reflect financial aid coordination between WIOA and the training institution (<i>coordination requires an exchange of information between the school and WIOA</i>)
			<p><u>Verification that Occupational Skills Training is on the Eligible Training Provider List (ETPL).</u></p> <p><i>Idaho's published ETP list</i> – in <i>IdahoWorks</i>*</p> <p><i>Out of state with reciprocal agreement</i> - Career planners/coaches upload the program and school information from the ETP website of the reciprocal state at the time the training service is opened. *</p> <p>*Uploaded snapshots should include the date captured from the website to verify the program is on the list as of the service start date.</p>
			<u>Educational Grant in IW</u> - Enter ITA in <i>IdahoWorks</i> for those participating in training activities and receiving an Individual Training Account.
			<u>Signed WIOA Classroom Training Agreement</u> (<i>Required only when training is being provided</i>)

To IW	To Payroll	Done	WORK EXPERIENCE/ INTERNSHIP/JOB SHADOWING
			<u>Job Description</u> Work Experience/Internship <u>WIOA-40</u>
			<u>Memorandum of Agreement for:</u> Work Experience <u>WIOA-48</u> Internship <u>WIOA-51</u> Job Shadowing <u>WIOA-22</u> State of Idaho Employer Non-State of Idaho Employer
			<u>Operational Guidelines:</u> Work Experience <u>WIOA-48A</u> Internship <u>WIOA-51A</u> Job Shadowing <u>WIOA-22A</u> <i>For the worksite (check when given to the worksite)</i>
			<u>Participant Agreement:</u> Work Experience Participant Agreement Internship Participant Agreement
			<u>COVID-19 Forms (for all Work-Based Learning Activities)</u> COVID-19 Prevention Handout (<i>For the worksite (check when given to the worksite); and</i>) COVID-19 Acknowledgement Form
			<u>IRS Form W-4 and Idaho Form W-4</u> for Work Experience or Internship – <i>not needed for Job Shadowing</i>
			<u>INS Form I-9</u> U.S. Work Authorization - <i>Reminder: A Social Security card alone does not verify work authorization – not needed for Job Shadowing</i>
			<u>W-9</u> if not already submitted (<i>required for any payments made to participants</i>)
			Send to WIOA Payroll - Participant's hourly wage or wage change.
			Send to WIOA Payroll - If participant changes their address (<i>in addition to changing in IdahoWorks</i>)
			<u>WIOA-50</u> Weekly/Bi-Weekly Time Report
			<u>WIOA-175</u> Participant Evaluation Mid-Point Final
To IW	To Payroll	Done	ON-THE-JOB TRAINING
			<u>WIOA-19A</u> On-the-Job Training Contract/Modification Form
			<u>WIOA-19B</u> On-the-Job Training General Provisions <i>For the worksite (check done when given to the worksite)</i>
			<u>WIOA-19C</u> OJT/Customized Training Pre-Award Review – <i>only needed if employer has recently relocated to area</i>
			<u>WIOA-19F</u> On-the-Job Training Operational Guidelines <i>For the worksite (check done when given to the worksite)</i>
			<u>WIOA-19E</u> OJT Training Task Outline
			<u>WIOA-17</u> Timesheet/Invoice OR <u>WIOA-17M</u> Monthly Timesheet/Invoice
			IRS Form <u>W-9</u> -When the employer is not already in vendor list
			<u>COVID-19 Forms (for all Work-Based Learning Activities)</u> COVID-19 Prevention Handout COVID-19 Acknowledgement Form <i>For the worksite (check done when given to the worksite)</i>

To IW	To Payroll	Done	OUT OF AREA WORK SEARCH/ RELOCATION
			WIOA-130 Out-of-Area Work Search
			WIOA-130 Relocation
To IW	To Payroll	Done	EXIT AND POST EXIT
			Any additional documents or correspondence, not already uploaded, relevant to the participant's assessment or service strategy
			Diplomas or Certificates earned after exit, but before the end of the 4 th quarter after exit) <i>(upload and data enter in IdahoWorks)</i>
			<p><i>IdahoWorks</i> data entry upon completion of enrollment activities:</p> <p>Complete all services</p> <p>Youth only: Open 99 Follow-up service <i>(with expected end date one year out)</i></p> <p>Complete data entry on any outstanding MSG's</p> <p>Answer outcome questions for each quarter.</p> <p> "Save" even if there is no information entered Answer Exit Questions</p> <p>Enter any certificates received so far in 4th quarter outcomes</p>

Questions may be directed to your supervisor or to WIOA/TAA@labor.idaho.gov.

Remove any Personally Identifiable Information (PII)

Notes:

			NDWG WORK EXPERIENCE
To IW	To Payroll	Done	
			<u>Job Description</u> (NDWG) COVID Work Activity <u>WIOA-40</u>
			<u>Memorandum of Agreement</u> for: (NDWG) COVID-19 NDWG (State of Idaho Employer) (NDWG) COVID-19 NDWG (Non-State of Idaho Employer)
			<u>Operational Guidelines:</u> (NDWG) COVID-19 Work Activity Operational Guidelines (08/17/20) <i>For the worksite (check when given to the worksite)</i>
			<u>COVID-19 Forms (for all Work-Based Learning Activities)</u> COVID-19 Prevention Handout (<i>For the worksite (check when given to the worksite)</i>); and COVID-19 Acknowledgement Form
			<u>(NDWG) COVID-19 Participant Agreement</u>
			<u>IRS Form W-4 and Idaho Form W-4</u> for Work Experience
			<u>INS Form I-9 U.S. Work Authorization - Reminder: A Social Security card alone does not verify work authorization</u>
			<u>W-9</u> if not already submitted (<i>required for any payments made to participants</i>)
			Send to WIOA Payroll - participant's hourly wage or wage change.
			Send to WIOA Payroll - if participant changes their address (<i>in addition to changing in IdahoWorks</i>)
			<u>WIOA-50 Weekly Time Report</u>
			<u>WIOA-175 Participant Evaluation</u> Mid-Point Final