

O-02 Transfer of Cases

Updates

7/1/2015: Updated for WIOA

10/2004: Policy first created and first posted

Transfer within the WOW Area

When the Career Planner is informed by the participant that she/he is moving or has moved to another county within the WOW area, the Career Planner should notify the Program Manager. She will determine when the actual change in Career Planner will occur. In general, the Program Manager will ensure the case is transferred timely. The timeline will vary because some participants will notify the Career Planner that they intend to move well ahead of time and some will notify the Career Planner after they have already moved. The original case file will be sent to the new Career Planner. Career Planners will need to make any changes necessary in ASSET prior to the re-assignment of the case to new Career Planner.

Move Outside of the WOW Area

When a participant moves outside of the WOW area, we need to ensure that clients continue to be supported in their job search and that consideration is given the most appropriate course of action for performance outcomes.

For a participant staying in Wisconsin, the individual is not immediately exited but a transfer to the WIOA provider in the new area is attempted.

- The local Career Planner will contact the appropriate WIOA agency where the participant will be residing to get the contact information for a new Career Planner. The participant will then contact the new Career Planner to begin the transfer process.
- The local Career Planner should close out all service components in ASSET and contact the new Career Planner before mailing a copy of the file to him/her.
- It is the local Career Planner's responsibility to ensure that the case is successfully moved to the other county by checking if new service components are open within 30-calendar days after case is transferred. Because the case remains open for the transfer, new services need to be added or the case will soft exit in 90 days.
- Before closing a participant in a training component, the Career Planner should also enter the proper credential and/or measurable skills gain, if applicable, for any training that was completed. If applicable, the Career Planner should terminate any ITA that is approved for a future semester.
- If the participant has moved and left no forwarding information or does not follow-through on contacting the WIOA agency where the participant will be residing, the participant can be exited.

Outside of Wisconsin

A participant moving out of state has to be exited from the program; consequently it is imperative that the participant is employed after the move. Wisconsin participates in the Wage Record Interchange System with another 46 States. As with any exit, the Career Planner will still need to conduct follow-ups after exit so new address and phone information must be recorded. This is especially necessary if the participant becomes self-employed or works for a company that does not report to Unemployment, as earnings need to be verified through supplemental data