

Technical Assistance (TA) Guide – Closure/Program Exit

This TA Guide is to provide guidance for closing out and exiting a participant. This TA Guide is not meant to be all-inclusive but rather a guide to our service providers. It is the responsibility of the service provider to review all applicable policies.

An exit occurs when a participant has not received any services for 90 consecutive days and is not scheduled for future services. Exits are often triggered by completion of training, successful transition into employment or loss of contact. An exit will occur automatically with the date of exit applied retroactively to the last day in which the service was received.

Prior to a participant exiting, the career advisor must ensure the following:

* 1. All activities have been closed properly
  2. IEP/ISS including all goals and objectives have been closed properly
  3. Case closure case note with all required information has been recorded in NCWorks
  4. All Measurable Skill Gains and credentials earned during enrollment have been recorded and verification (documentation) has been scanned into NCWorks
  5. All means of contact attempted has been documented, *if applicable*
  6. Drop out form scanned, and program activity matches last date of attendance listed on from, *if applicable*

A closure request form should be completed and forwarded to program manager for approval. Once approved, the form must be scanned into NCWorks. If the participant is exiting to employment, the Career Advisor must also complete the Employment Verification Form and scan into NCWorks along with a paystub.

After the exit is posted in NCWorks, staff should complete the “Create Closure” section in NCWorks to capture the participant’s status.

Should a participant need to be excluded from performance, an exclusion request should be forwarded to the Local Area staff for approval. Exclusions must be documented in case notes, have verification scanned into NCWorks in the “Create Outcome” section.

Exclusions are:

* Institutionalized
* Health/Medical
* Deceased
* Reservist Called to Active Duty
* Retirement
* In foster care and moved from area by foster care system (Youth)

If technical assistance is needed to ensure proper closure and exit, please contact the Local Area.

Applicable policies:

* Program Exit, Follow Up, & Reenrollment
* NCWorks Service Activity Codes, Case Notes and Exit Dates