Adult/Dislocated Worker
Orientation, Intake & Enrollment Process Flow

1 **Initial Contact** (can be done by any CA)
- CA assists with NCWorks Online registration, completes WP enrollment and records 102 activity and case note.
- CA provides customer with next steps: Required Document Summary, NCCareers.org assessment, and next appointment/orientation session

Continue screening for eligibility up until this point

2 **Intake/Onboarding**
- Customer receives WIOA orientation (go over services and expectations)
- Review NCCareers.org assessment
- Assign Career and Training Research Worksheets
- Complete WIOA app, upload/scan/redact documents *don't trigger participation*
- Complete Intake Forms and upload
- Assign TABE test/obtain TEAs for nursing students, if applicable

3 **Audit Review**
CA presents file to Program Manager or designee to review and waits until approval to proceed

STOP

Continue screening for suitability up until this point

4 **Enrollment/Participation**
- CA and customer sign and date WIOA app, and upload to docs
- CA triggers participation and records 202 activity with case note detailing eligibility
- Complete Enrollment Forms and upload
- Complete Objective Assessment (OA) and record 203 activity with case note detailing barriers
- Complete Individual Employment Plan (IEP), sign, date and upload to docs, and record 205 activity with case note detailing plan for time in the program

5 **Case Management**
- Participant begins participation in program
- CA provides next appointment date
- CA records all activities and case notes as applicable
- If attending training, CA completes Training Justification tab
- CA and participant review IEP quarterly. If updates are made, sign, date and upload to docs, and record 20A activity with case note detailing changes. If no updates are required, just case note that it was reviewed.

3/2025