**WIOA Title I Orientation, Intake & Enrollment Process Flow**

*Screen for eligibility*

1. Initial Contact (can be done by any Career Advisor)
   1. Career Advisor assists with NCWorks Online registration
   2. Career Advisor completes Wagner Peyser application and records 102 activity with case note
   3. Career Advisor and customer sign and date Wagner Peyser application, Career Advisor uploads to documents
   4. Career Advisor provides customer with next steps: Required Document Summary, assigns NCCareers.org Interest Finder Assessment, and next appointment/group orientation session

*Screen for suitability*

1. Intake/Onboarding
   1. Customer receives WIOA orientation (customer is made aware of program services and expectations for their time in the program)
   2. Review NCCareers.org assessment, assign Career and Training Provider Research Worksheets
   3. Complete and upload Intake Forms and eligibility documents, redact
   4. Complete WIOA application \*do not trigger participation\*
   5. Assign TABE as applicable (required for Youth) or obtain TEAs for nursing students
2. Audit Review
   1. Send file to Program Manager or designee for a full review and approval
3. Enrollment/Participation (all done on the same day)
   1. Once approved, trigger WIOA participation
   2. Record 202 activity (A/DW) or 442 activity (Youth) and explain eligibility in the case note
   3. Career Advisor and customer sign and date WIOA application, Career Advisor uploads to documents
   4. Complete and upload Enrollment Forms
   5. Complete Objective Assessment and record 203 activity (A/DW) or 412 activity (Youth) with case note summarizing the barriers discussed while doing the OA
   6. Complete the IEP/ISS and record 205 activity (A/DW) or 413 activity (Youth) with case note summarizing goals and objectives, including “created jointly by participant and Career Advisor,” and that supportive services will be provided
   7. Career Advisor and customer sign and date the IEP, Career Advisor uploads to documents
4. Case Management *this order will vary significantly by participant* 
   1. Participant begins participation in program
   2. Career Advisor provides participant with next appointment
   3. If attending classroom training, Career Advisor completes the Training Justification tab, and Career Advisor records correct training activity
   4. Career Advisor and participant update IEP every 90 days, both sign and date, Career Advisor uploads to documents and records 20A activity (A/DW) or 41A activity (Youth) with case note summarizing updates made. For youth, a staff assisted activity must be recorded with IEP update to extend exit. Adult/DW staff should recorded a staff assisted activity if other services were provided during the meeting.
   5. If participant receives supportive services, Career Advisor records the appropriate CSS activity code. Supportive services should be paired with staff assisted activities to ensure participants receive financial assistance in conjunction with meaningful career advising.