

Attachment A  
Career Planning Tool

## CAREER PLANNING

The process undertaken by an individual customer and Career Center Staff to create an agreed upon Individual Employment Plan (IEP) including a specific mix of Career Center services and resources necessary to attain the customer's employment goal.

**ASSESSMENT:** The identification and analysis of the strengths and possible challenges in relation to the individual's education, work history, skills, knowledge, interests, abilities, labor market, aptitude, testing scores and any barriers to employment.

### **BASIC CAREER SERVICES:**

WIOA basic career services represent "front end" basic services to job seekers. Basic career services are universally accessible and must be made available to all individuals seeking employment and training services.

Services and activities include the following:

- Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
- Outreach, intake (including worker profiling), and orientation to information and other services available through the local workforce system;
- Initial assessment of skill levels, including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and support service needs;
- Labor exchange services, including:
  - Job search and placement assistance, and when needed by an individual, career counseling, including the provisions of information on nontraditional employment and in-demand industry sectors and occupations ; and

### **INDIVIDUALIZED CAREER SERVICES:**

Individualized career services assist WIOA eligible participants through the exploration of careers, training programs, and employment opportunities. The following individualized career services require registration and must be made available and are available in all one-stop centers, if determined to be appropriate, in order for an individual to obtain or retain employment. One-stop center staff may use recent previous assessments by partner programs to determine if individualized career services are appropriate.

These services shall be provided as appropriate:

- Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers;
- Development of a Career Action Plan to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve his or her employment goals, including the list of, and information regarding eligible training providers;
- Group counseling;
- Individual counseling;
- Career planning;
- Short-term pre-vocational services, including development of learning skills, communication services,

### **FOLLOW UP SERVICES:**

Follow-up services must be provided, as appropriate, for participants who are placed in unsubsidized employment for up to 12 months after the first day of employment.

Follow-up services could include, but are not limited to:

- Additional career planning and counseling
- Contact with the participant's employer, including assistance with work-related issues that may arise
- Peer support groups
- Information about additional educational opportunities, and referral to supportive services available in the community
- Case management administrative follow-up
- Other services

Follow-up services do not extend the date of exit in performance reporting.

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<ul style="list-style-type: none"> <li>➤ Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services not traditionally offered through the local workforce system;</li> <li>• Provision of referrals to and coordination of activities with other programs and services, including programs and services within the local workforce system and when appropriate, other workforce development programs (e.g. Partner Services including but not limited to SNAP, TANF, HUD, Mass Health Connector, etc.);</li> <li>• Provision of workforce and labor market employment statistics information, including information relating to local, regional, and national labor market areas: <ul style="list-style-type: none"> <li>➤ Job vacancy listings in labor market areas.</li> <li>➤ Information on job skills necessary to obtain the vacant jobs listed; and</li> <li>➤ Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.</li> </ul> </li> <li>• Provisions of performance information and program cost information on eligible providers of training services by program and provider type;</li> <li>• Provision of information about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system.</li> </ul>	<p>interviewing skills, punctuality, personal maintenance skills, and professional conduct services to prepare individuals for unsubsidized employment or training ;</p> <ul style="list-style-type: none"> <li>• Internships and work experience that are linked to careers;</li> <li>• Workforce preparation activities that help an individual acquire a combination of basic academic skills, critical thinking skills, digital literacy skills, and self-management skills, including competencies in utilizing resources, using information, working with others, understanding systems, and obtaining skills necessary for successful transition into and completion of postsecondary education, training, or employment.</li> <li>• Financial literacy services;</li> <li>• Out-of-area job search and relocation assistance; and</li> <li>• English language acquisition and integrated education and training programs.</li> </ul>	
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<ul style="list-style-type: none"><li>• Provision of information, in usable and understandable formats and languages, relating to the availability of support services or assistance, and appropriate referrals to those services and assistance;</li><li>• Provision of information and assistance regarding filing claims for unemployment compensation</li><li>• Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA.</li></ul>		
<b><i>There is no required sequence of services</i></b>		

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Element	Required Documentation Elements	Related MOSES Elements	Additional Staff Guidance
<b>Basic</b>	Complete the Basic tab	Populate or update customer's basic information	Ensure staff let customer know to keep contact info updated in both Job Quest and UIO.
<b>Full</b>	<ul style="list-style-type: none"> <li>• In school</li> <li>• Highest Degree</li> <li>• Career Objective</li> </ul>	Populate or update the full TAB	Staff should complete as much data as they can gather including, basic info, disclosure of a disability, Language, identification as long-term unemployed, family size, migrant status if disclosed/identified. The more complete the record is the better identification of resources that may be available to the person.
<b>Educational Background</b>	<p>Detailed summary of education history and attainment to include:</p> <ul style="list-style-type: none"> <li>• Degrees and diplomas</li> <li>• Industry-recognized Licenses/Certifications and issue and expiration dates</li> <li>• Continuing Education courses (not necessarily industry-recognized)</li> <li>• Specialized training or other credentials</li> <li>• If other or none explain</li> </ul>	Populate or update education history collected and update Education TAB	<p>During the course of providing career planning services the customer may achieve additional education or training. If so the Education Tab must be revised to document the achievement.</p> <p>In addition, on the General Services tab post an Outcome/Enhancement.</p> <p>A copy of appropriate documentation must be acquired for any industry-recognized credential obtained through training.</p>
<b>Work History</b>	<p>List relevant employment and include the following:</p> <ul style="list-style-type: none"> <li>• Name (do employer search)</li> <li>• Occupational Code</li> <li>• Job Title</li> <li>• Start/End date</li> <li>• Main Duties</li> <li>• Salary and Benefits</li> <li>• Reason for Leaving Prior Job(s)</li> <li>• NAICS</li> </ul>	<p>Populate or update (edit) the customer's work history on the MOSES Work Experience tab.</p> <p>If the employer is already visible on the screen EDIT the information to update.</p>	Best Practice: Include a minimum of five years (if available)

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<b>Skills and Abilities Testing:</b> <ul style="list-style-type: none"> <li>Basic Skills</li> <li>Occupational Skill/Abilities</li> <li>Aptitudes</li> <li>Career Interest Inventory</li> </ul>	<p>Testing tab in MOSES:</p> <p>Test results are placed in customers file</p> <p>Document completed assessments on the General Services tab</p>	<p>Assessments/Testing:</p> <ul style="list-style-type: none"> <li>Instrument name and version</li> <li>Date administered</li> <li>Score/Results</li> <li>Analysis (if applicable)</li> </ul> <p>If an assessment is not completed, explain and document why</p>	<p>Testing of basic skills is strongly recommended for customers.</p> <p>Reading and Math scores must be recorded for all customers (e.g. TABE) being considered for education/training.</p> <p>Individuals with post-secondary education may be exempted from testing.</p>
<b>Identify Barriers to Education/Employment</b> <ul style="list-style-type: none"> <li>Labor market for Current Skills</li> <li>Job Search Skills</li> <li>Other barriers including, but not limited to: transportation, housing, language skills, child care, etc.</li> </ul>	<p>Documentation of any impediments to successful participation in job search, training and sustained employment</p> <ul style="list-style-type: none"> <li>Barrier Name</li> <li>Brief Description</li> <li>Plan to address the Barrier</li> </ul>	<p>Check the appropriate barrier boxes on the Barriers TAB.</p> <p>Enter the specific barrier name, brief description, and plan to address the barrier in the Barrier Notes field.</p>	<p>The barriers TAB should be used to accurately record identified barriers and plans to address them.</p> <p>Do not delete a barrier once it has initially been recorded. If a customer eventually overcomes a specific barrier, record how it was done, date recorded and the staff member's initials.</p>
<b>Labor Market Information</b> <i>(Please note: local Labor Market Information must be used.)</i>	<ul style="list-style-type: none"> <li>Document why the customer can or cannot find suitable employment with his or her (current) skills in the current labor market</li> <li>If applicable, explain and justify why the customer will be likely to find suitable employment with newly acquired skills</li> <li>Substantiate the information with cited reliable sources</li> </ul>	<p>Document labor market conditions for both the prior job and future employment goal. Record information on the Career Plan (currently known as the Case Plan tab in MOSES); Assessment sub-tab.</p>	<p>Labor market information is required for all customers receiving career planning services, including those not changing occupations or receiving training as current market conditions could impact their job search.</p>
<b>ELIGIBILITY FOR INDIVIDUALIZED SERVICES CAN NOW BE DETERMINED FOR NEXT STEPS</b>			

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**GOAL SETTING:**

The process undertaken by (both) a customer and designated career center staff person to identify and mutually agree upon the customer's desired education/employment goals and the necessary intermediate goals to achieve the desired outcome.

Element	Required Documentation Elements	Required MOSES Elements	Additional Staff Guidance
Review Results of the comprehensive assessment with customer	Review: <ul style="list-style-type: none"> <li>• Labor Market Information</li> <li>• Wage Range desired</li> <li>• Skill match (e.g. TORQ)</li> </ul>	If any additional assessment tools are completed, document their completion under General Services	Best Practice: Tasks should correspond to goals
Identify and Discuss education/employment related goals		<ul style="list-style-type: none"> <li>• Description OF SHORT AND LONG TERM GOALS to achieve desired outcome</li> <li>• Clarifying and supporting NOTES should support goals</li> <li>• Record on Career Plan tab (currently known as the Case Plan tab)</li> </ul>	Staff must discuss with the customer if the goals are realistic and achievable
Set Goals	Goal Statement	The employment goal statement must be entered into the Goal Narrative on the Goals sub-tab	<p>Record Goals that both the customer and career center staff agree are realistic and attainable</p> <p>The employment goal narrative should be consistent with the customer's career objective in Job Quest</p> <p>Advise customer regarding consistency in career objective as customer can update.</p>

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**ON-GOING CAREER PLANNING:**

The regular, periodic contact with the customer and/or Career Center staff and program partners to review and determine progress toward the individual's employment goal, or to review and determine the customer's status with regard to a specific element of the employment plan.

Element	Required Documentation Elements	Required MOSES Elements	Additional Staff Guidance
<b>On-going career planning may:</b> <ul style="list-style-type: none"> <li>• Ascertain a customer's progress on the agreed upon Individual Employment Plan and update as necessary</li> <li>• Identify new or additional barriers or personal issues to be resolved</li> <li>• Evaluate a customer's participation in planned service components</li> <li>• Document a customer's entry into employment               <ul style="list-style-type: none"> <li>• Identify that a customer's status changed.</li> <li>• Revise and adjust services as necessary</li> <li>• Case conference with partners when necessary</li> </ul> </li> </ul>	<p>Record in a timely manner all status and/or outcome data provided by the customer or program and/or partner staff.</p> <p>WIOA customers must receive Career Planning Services at a minimum of <u>at least</u> every 60 days*.</p> <p>*Veterans must receive Career Planning services <u>at least</u> every 30 days</p>	<p>Services must be entered on the correct service tab with a corresponding MOSES note</p> <p>Ensure all related components are updated accordingly to reflect the provision of services</p> <p>If note is not entered on the actual day of service include the actual date of service in the note</p>	<p>Use MOSES notes for documentation. When prompted for a service, record the appropriate service.</p> <p>All services must be accompanied by a MOSES notes entry.</p> <p>Local policy required for loss of contact</p>

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**FOLLOW UP:**

Follow-up services must be provided, as appropriate, including counseling regarding the workplace for participants in adult or dislocated worker workforce investment activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment.

While follow-up services must be made available, not all of the adults and dislocated workers who are registered and placed into unsubsidized employment will need or want such services.

If a customer declines follow up services, it must be recorded in MOSES and explained why in the accompanying NOTE.

Element	Required Documentation Elements	Required MOSES Elements	Additional Staff Guidance
<p><b>Follow-up services could include, but are not limited to:</b></p> <ul style="list-style-type: none"> <li>• Additional career planning and counseling</li> <li>• Contact with the participant's employer, including assistance with work-related problems that may arise</li> <li>• Peer support groups</li> <li>• Information about additional educational opportunities, and referral to supportive services available in the community</li> <li>• Case management administrative follow-up</li> <li>• Other services</li> </ul>		<p>Document "after exit follow-up" service (<u>not</u> blue bold)</p>	<p>All services received must have an accompanying MOSES note to support. If there is a gap in services, explain in notes why this has occurred.</p>



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**CASE CLOSURE:**

The formal cessation of active service delivery and follow-up conducted in conjunction with the agreed upon elements and terms included in the customer's formal Individual Employment Plan.

Element	Required Documentation Elements	Required MOSES Elements	Additional Staff Guidance
<p><b>Formal Case Closure may occur:</b></p> <ul style="list-style-type: none"> <li>• After the required follow-up period and verification that a customer has achieved his/her employment goal as described in the Individual Employment Plan.</li> <li>• After verification from a customer that he or she has decided to no longer participate in the program of services described in the Employment Plan.</li> <li>• After the 90-day period following the case manager's last contact with a customer who has ceased to participate in the planned services as described in the Individual Employment Plan and who has not achieved his or her stated employment goal.</li> <li>• Other unanticipated circumstances may also warrant formal case closure</li> </ul>		<p>Update all goals so no goals are in the Pending status on the Career Plan, Goals sub-tab.</p>	<p>Record proper job entry category information (obtained employment, found employment) on the Services, Employment sub-tab.</p> <p>NOTE: For <i>entered employments</i>, MOSES will automatically record the appropriate outcome/enhancement service.</p> <p>Closure after a 90 day no contact period must be done in accordance with local policy regarding lack of contact.</p>