



Workforce Issuance

100 DCS 08.112.3

☒ Policy ☐ Information

To: Chief Elected Officials
MassHire Workforce Board Chairs
MassHire Workforce Board Directors
MassHire Career Center Directors
MassHire Fiscal Officers
MDCS Operation Managers

cc: WIOA State Partners

From: Diane Hurley, Acting Director
MassHire Department of Career Services

Date: October 30, 2023

Subject: **Career Planning Requirements for WIOA Youth, Adult and Dislocated Worker Customers**

Purpose: To provide guidance and clarification to MassHire Workforce Boards, (Local Boards), MassHire Career Center Operators (MCCO), MassHire Career Center (MCC) managers and staff related to interpretation and application of the elements that comprise WIOA career planning for job seeker customers under a formal Individual Employment Plan (IEP) and to ensure the integrity of reporting career planning activities and services through the Massachusetts One-Stop Employment System (MOSES).

Updates:

- The word “youth” was replaced with the word “appropriate” to clarify that staff must enter the required elements of the Youth ISS into the appropriate tabs in MOSES (page 3)
- Instruction on time frames for data entry of customer information into MOSES (Page 6)

- Guidance for correcting, or updating, participant records, when necessary (Page 6)

Background: WIOA requires that MassHire Career Centers provide services to individual customers based on individual needs, including the seamless delivery of multiple partner services to individual customers.

WIOA defines three types of “Career Services”: basic career services, individualized career services, and follow-up services.

Career Planning is the method of providing job seeker customers with a formal, structured plan of action designed specifically to identify an appropriate employment goal and to develop a schedule of activities and services that will empower the customer to overcome or mitigate barriers to attaining their goal(s).

Career Planning is an Individualized Career Service. The term “career planning” means the implementation of a person-centered approach in the delivery of services. Case management (career planning service) is in fact a two-way contact – communication – via person-to-person, email back and forth on the same date/day (in some instances occurring over a two-day period), or a two-way telephone conversation of substance that results in a more direct, personalized, and real customer service that is value-driven. The Career Planning delivery model is designed to prepare and coordinate comprehensive employment plans for participants to ensure access to appropriate workforce investment activities and supportive services, using, where feasible, computer-based technologies and to provide the appropriate job, education, and career counseling during program participation and after job placement.

To ensure the accurate and consistent interpretation, data entry, and reporting of service elements provided to job seeker customers within the context of Career Planning, it is important that career center management and staff know which customer groups have been designated as eligible for Career Planning. Management and staff also need to be knowledgeable of specific Career Planning functions and the service elements and actions that fall within those functions, and to know the correct method for recording those service elements and actions in MOSES.

Policy: Formal Career Planning will be the standard service delivery model for all job seeker customers, including youth.

Career planning for youth must be provided as part of required framework services and is based on objective assessments, career goals, and the needs of

each youth participant as evidenced by the development of an Individual Service Strategy (ISS) and documented in MOSES.

In accordance with WIOA Section 129 (c) (1) (B), all eligible WIOA youth will have an ISS developed as required for program participation. The ISS represents an individual service strategy that directly links to one or more indicators of performance and identifies career pathways that include education and employment goals, appropriate achievement objectives, and appropriate services.

Consistent with [100 DCS 19.107: WIOA Youth Individual Service Strategy](#) policy, staff must enter the required elements of the ISS into the appropriate tabs in MOSES. This includes documenting the following sections of the Youth ISS in MOSES:

- Participant identifying information, including name, and contact information
- Participant assessments administered, including assessment dates and results
- Educational and work experience background
- Identification of immediate participant needs with documented recommendations for solution
- Participant education goals
- Identification of an initial career goal, as well as employment goals, as applicable
- Strengths and Challenges
- Participant supportive service needs
- Participant personal goals
- Case Notes

Instructions for documenting sections of the Youth ISS in MOSES are found in Attachment B: Instructions for Documenting Youth ISS Sections in MOSES.

Each customer enrolled in the WIOA Title I Adult or Dislocated Worker program receiving individualized services, including career planning services, will have a formal Individual Employment Plan (IEP).

An Individual Employment Plan (IEP) is an individualized career service consisting of connected activities, jointly developed by the participant and career center staff. The plan includes an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the job-seeking customer to attain these goals and objectives. The Individual Employment Plan (IEP) is an effective tool to serve individuals with barriers to employment and to coordinate the various services including training services they may need to overcome these barriers.

To recap: Career Planning activity is documented in MOSES for all populations. The planning tool that is used for the youth population is the ISS and for adults or dislocated workers, the planning tool to be used is the IEP.

Career Planning as defined by WIOA is a customer-centered, goal-oriented process through which an individual staff person, or a team of career center staff, assists a job seeker customer with the development and coordinated delivery of a structured program of planned, interconnected services to achieve a specific employment goal. The career planning model implies a partnership between the MassHire Career Center staff and the customer. The partnership involves distinct responsibilities aimed at linking the customer to appropriate career center services and ultimately, moving the customer to suitable employment. Systematic and timely data entry of all career planning activities ensures program continuity for each customer.

For career planning to be effective, the designated MCC counselor must be fully responsible for monitoring the customer's progress throughout the entire service plan schedule, not only for those elements of the plan provided directly by the MCC counselor, but also for services provided by other career center staff or staff of other service organizations.

As a standard best practice, counselors should contact the customer within 30 days, but must contact them within 60 days, unless program requirements or contractual agreements stipulate shorter durations, such as the Veterans under the JVSG Program. This regular contact is to ensure timely identification and resolution of any issues that could either significantly impede or negate participation in, or successful completion of, any planned service activity (particularly in relation to key services such as assessment, counseling, training, job development, job referral, etc.) or jeopardize the overall attainment of the customer's employment goal. Regular contact with other direct service providers is also an important step in assessing progress and assuring the customer's overall success. Contact is defined as providing a recognized MOSES service and a detailed Note of said service in the Job Seeker record.

MassHire Career Center managers and staff must note that career planning can occur across geographic career center service areas. Given that customer choice is a cornerstone of the service delivery model under WIOA it is conceivable, and in some geographic areas, likely, that the development of a formal Individual Employment Plan (IEP) will involve the provision of services through more than one career center location. In such cases, the designated MassHire Career Center (MCC) counselor must maintain the overarching responsibility for assisting the customer with the development of an IEP with the optimal mix of services that will help the job seeker reach his/her employment goal(s)

regardless of the career center location. The designated MCC counselor must coordinate service delivery, conduct follow-up, and ensure that all necessary data and information is entered into MOSES in a timely manner, notwithstanding what individual, entity or career center is the actual service provider. For the benefit of the customer, communication among staff providing services through different MassHire Career Centers is essential.

If a MCC staff person is working with a customer who is receiving services through a different career center location, the staff person should ensure that services being provided are consistent with the customer's IEP and that the designated MCC counselor is informed of the customer's intent and/or actions. All services must be data entered in MOSES on a timely basis.

Consistent with established procedures, the MCC staff person must also seek and obtain the appropriate MOSES database access to make any modifications to the customer's IEP.

In some instances, a customer may choose to change career center locations entirely. It will be the responsibility of the MassHire Career Center Director to ensure that the designated MCC counselor formally transfers the individual's IEP to the new career center location and to a newly designated MCC counselor. The transfer should be accomplished according to established protocols and practices.

The purpose of the Career Plan in MOSES is to record and report services and activities developed and undertaken under the auspices of an IEP and within the context of a career planning service model.

The MOSES Career Plan supports all career planning functions from an individual's initial assessment and program eligibility determination through service delivery documentation, follow-up, and case closure. MOSES provides a "tickler" system to aid the designated counselor in monitoring the customer's

progress in carrying out their IEP and in conducting timely follow-up activities. MOSES provides the functionality for staff to effectively record, manage, and track all career planning services for each customer assigned to their case load.

Local areas must have procedures in place to collect information from service/training providers and record services in MOSES within 30 days of customer activity and participation in programs and services. Staff must ensure data entry for customer participation in career center activities, including workshops, seminars, etc., is entered in MOSES as close to the actual date of participation as possible.

Please note, late data entry impacts federal performance. Local areas must have procedures in place to update customer data entry prior to the end of the fiscal year to ensure information on customer performance is captured for WIOA annual reporting.

Customer records in MOSES must be updated accordingly, e.g., attainment of a credential, data entry correction, change of address, etc. Data entry for customer eligibility purposes must not be changed during participation.

Career Planning Elements (Attachment A) outlines career planning elements for job seekers including, Assessment, Goal Setting, Strategy/Plan Development, Service Delivery Coordination, Follow-Up, and Case Closure. Attachment A also provides general guidance regarding the documentation requirements related to recording career planning services for job seekers in MOSES. Staff must ensure career planning services are provided in accordance with the career planning elements outlined in Attachment A.

During program monitoring, staff must be prepared to provide a justification as to why any element of career planning is not utilized/addressed with the customer or documented in MOSES.

Action

Required: MassHire Workforce Boards and MassHire Career Center Operators must ensure that the above elements related to the provision of career services by required career center partners is incorporated into career center operations.

Effective: Immediately

Attachment: A- Career Planning Elements – NO UPDATES
B- Instructions for Documenting Youth ISS Sections in MOSES – NO UPDATES

Inquiries: Please email all questions to PolicyQA@mass.gov Also, indicate issuance number and description.

References: WIOA Section 3(8)(A)&(B)
WIOA Section 129 (c) (1) (B)
WIOA Final Rules: 20 CFR §681.420