Oklahoma Employment and Training Issuance #7-2002

To: WIA Grant Recipients

From: Terry Watson

Date: April 22, 2002

Subject: Transferring WIA Customers

Background: Basic to the Workforce Investment Act (WIA) is to facilitate an efficient transition for qualified individuals through core, intensive, and training services. Customers should be able to easily enter and re-enter the system at any point, from any area.

Purpose: To establish procedure for transferring WIA customers from area to area.

Message: In the event that a WIA customer moves from one Workforce Investment Area to another, the *original* area case manager will:

- Update the participant's files on Oklahoma Service Link within 5 working days of notification of transfer
- Contact the assuming case manager through OSL
- Document the reason for transfer in "Case Notes"
- Terminate the participant from caseload
- If a case folder exists, send a *copy* of it to the assuming case manager, maintaining all original case folder records
- Maintain financial responsibility for costs of other programs that the customer has been enrolled in when the assuming area does not have adequate funding (until the end of the program year)

The *receiving* area case manager will:

- Contact the transferring customer within 10 working days from the date of the transfer
- Accept the eligibility determination of the original area without liability
- For reporting purposes – "If the individual was jointly served by two or more local areas, record the code for the local area in which *the individual resides*."
  TEGL 14-00, Change 1, Attachment E, Page 12

Action Required: Please follow these procedures when transferring a WIA customer from one area to another area. If you have any questions, please contact Robyn Coman, 405-557-5318.