Service Provider WEX Procedure and File Checklist

- LWIB should be contacted by emailing boffice@so14lwib.com on or before the start of the Work Experience and provided with the First Name, Last Name, Customer Phone Number, Last 4 of Social, Worksite Name, Start and End Date, and Supervisor Name and Contact Information. Failure to comply will result in a monitoring finding.
- The Work Experience Participant should have the following UPLOADED in IWDS 2.0 in addition to all other WIOA file requirements:

<table>
<tr><th>Uploaded:
Y/N/NA</th><th>DOCUMENT LIST FOR
(Customer Name)__________________</th></tr>
<tr><td></td><td>• <u>Work Experience and OJT Pre-Award Survey</u>
o Completed by Service Provider BEFORE any other documents can be completed
o If participant is under 18 and there is no background check completed for the worksite's supervisor then a sex offender search is attached to the survey uploads</td></tr>
<tr><td></td><td>• <u>Work Experience Contract</u> with modifications as needed</td></tr>
<tr><td></td><td>• <u>Supervisor Orientation</u>
o Don't forget to give the Supervisor the Worksite Supervisor Handbook</td></tr>
<tr><td></td><td>• <u>Participant Orientation</u></td></tr>
<tr><td></td><td>• <u>Work Experience (WEX) Outline/Plan</u> with modifications as needed
o Job Description should be attached to the WEX Outline/Plan
▪ Job Description can be written with the Employer (see page 3 of WEX Outline/Plan for more information on how to do this)
o Career Planner should establish "SPECIFIC SKILLS FOR THE TRAINEE TO LEARN" on the WEX Outline/Plan Section 3. These will have estimated hours to learn skill, start and completion date and an assessment method</td></tr>
<tr><td></td><td>• <u>Universal Career Plan</u> signed in IWDS 2.0 with modifications as needed
o Skill Gaps are addressed and services added as appropriate as outlined in Policy 22 Section 3.e.a.iv and given in example 1 and 2.</td></tr>
</table>

	• ***Work Experience (WEX) Progress Report (REPORTING PERIOD START DATE AND REPORTING PERIOD END DATE)*** o Section 1 and 3 MUST BE completed by Career Planner o Section 2 MUST BE completed by the Worksite Supervisor o Should have at a minimum two WEX Progress Reports ▪ These should have ESTABLISHED REPORTING PERIODS with dates listed on page 1 of WEX Progress Report next to "Report for the Period Ending". We suggest picking 2 pay periods during the duration of the contract and utilizing those. ▪ Note those dates are the REPORTING PERIOD START DATE AND REPORTING PERIOD END DATE that is needed as part of the file naming for the file upload process that can bee seen below in the HOW TO section below. o Section 3 of the WEX Progress Report will evaluate those "SPECIFIC SKILLS FOR THE TRAINEE TO LEARN" in Section 3 of the WEX Outline/Plan (please review those and transfer those exact skills to the WEX Progress Report). Again, this section MUST BE completed by the Career Planner
	• ***On The Job (OJT)/Work Experience (WEX) Local Monitoring Report*** o Completed by Career Planner/Service Provider once per month for the duration of the contract. ▪ Can be done for your 30 day contacts o Initial On The Job (OJT)/Work Experience (WEX) Local Monitoring Report MUST BE completed within 30 days of the Start Date of the Work Experience. Monitoring findings will be issued if this is not completed within the time frame. ▪ Ex: Start 1/1 must be completed before 1/30
	• ***LWIA Request for Work Experience Increase*** o Only if needed
	• ***Participant Time Sheets*** o A Running Total Each Pay Period Showing total hours worked and amount paid should be attached to each Participant Time Sheet. This is to assist Service Providers with staying within established policy of no more than 1040 total hours over 6 months and no more than $15,600 spent per employee unless LWIA Request for Work Experience Increase has been approved and on file. Fiscal may have a report for this, or you can simply keep a running total. Monitoring findings will be issued if this is not included with the Participant Time Sheet uploads.
	• ***Final Cost Report*** from fiscal showing total hours worked and amount paid

HOW TO UPLOAD:

1. In the Customer Profile select Access Case Management Tools
2. In the Quick Links Side Bar select Plan
3. Navigate to the WBL Service Line (regular allocated funding) or Training Paid by Non WIOA (state funding)
4. Select the Eyeball (Action Item) to the right of the WBL Service Line (regular allocated funding) or Training Paid by Non WIOA (state funding)
5. Scroll down and select the blue Add File button in the Service Files section
6. Select the blue Select File button
7. Navigate to the desired file to upload and select Open
8. In the Alternate File Name Box type the ***<u>BOLD/ITALIC/UNDERLINED</u>*** to match the document name listed above next to each bullet point for the desired file
    a. NOTE: take care to verify that the ***<u>BOLD/ITALIC/UNDERLINED</u>*** document name matches the list above. Failure to have the correct name will result in monitoring finding.
9. In the Document Type drop down select Other
10. If you have any notes such as updates or changes to the document, you can add this in the Notes section
11. Do #5-10 for EACH document listed above that is ***<u>BOLD/ITALIC/UNDERLINED</u>***