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July 11, 2005

To: Program Managers. Sacramento Works Career Centers (SWCCs), Site Supervisors, SETA-funded WIA/WtW Subgrantees

From: Kathy Kossick

RE: Job Retention Services  
Revised WIA Directive #02-09  
Revision #4

Beginning July 1, 2005, case managers and/or their delegates will be responsible Job Retention services and for contacting customers during the prescribed follow-up periods. Attached is the revised directive #02-09 which provides guidance on Job Retention Services.

***“Preparing People for Success: in School, in Work, in Life”***

July 15, 2005

To: Program Managers, SETA-Funded WIA Service Providers,  
Site Supervisors, Sacramento Works Career Centers (SWCCs)

From: Kathy Kossick, SETA Executive Director

**RE: Job Retention Services  
REVISED WIA DIRECTIVE #02-09  
REVISION #4**

**JOB RETENTION SERVICES: SWCC Case Managers**

The following procedures will assist case managers in providing a system of supports that ensures customers maintain primary contact with the same case manager from enrollment through Job Retention. The purpose of contact is to ensure that customers have the resources needed to succeed, to assist customers in achieving wage gains and upward mobility, and to let them know that we care.

1. Every time a customer is contacted, update the customer's contact information and alternate contact information in the case file and SMARTware.
2. Contact customers within one week of employment, regardless of whether the customer has exited, to address any issues that may adversely impact work. Assess whether there are issues that will affect attendance at work, job retention, and possible advancement (e.g., childcare, transportation, housing, health/medical, legal, family emergencies, conflicts at work, etc.).
3. Contact customers after one month of employment, regardless of whether they have exited, to address any issues that may adversely impact work.
4. Contact customers within the first week of the first Quarter after Exit to ensure they remain employed. If the customer is unemployed, work directly with the customer to obtain employment and address any issues that resulted in loss of employment. **(Performance Measure Affected: Entered Employment Rate)**
5. For all customers exited, complete a Follow-up Form (WIA EWIF) at the end of each quarter, and forward with updated contact information to the SWCC staff person responsible for entering the information into the JTA System. For older youth, effective July 1, 2005, complete a Follow-up Form (WIA EWIF) at the end of each quarter and forward with updated contact information to the SETA MIS staff person responsible for entering information into the JTA system.
6. Contact customers within the first week of the third Quarter after Exit to ensure they are employed. If the customer is unemployed, work directly with the customer to obtain employment and address any issues that resulted in the loss of employment. **(Performance Measure Affected: Employment Retention Rate)**
7. Contact customers monthly, until the end of the third Quarter after Exit (nine months after Exit).

8. Utilize the attached Job Retention Chart as a guide.
9. Record all customer contact in SMARTware and print a copy for the case file.
10. SMARTware statuses will be established to track and record the progress of customers (see attached SMARTware Activity Breakdown Table).
11. SWCC Case Managers and/or Site Supervisors may utilize “Timer Alerts” in SMARTware to remind them that some action/contact is required.

### **POST EXIT FOLLOW-UP**

The purpose of Post Exit Follow-up is to gather Supplemental Employment information. It can also be an opportunity to collect Customer Satisfaction information, provide Survey Response Awards.

To complete Post Exit Follow-up Services, staff should:

1. a. During the first Post-Exit Quarter – contact each exited customer by phone, email or letter. Staff may use the Employment Status Update letter/survey. After collecting follow-up information, staff should:
  - b. Input any changes in customer status or contact information into SMARTware and the JTA system
  - c. Mail the customer a survey response award or incentive, Address any additional service needs indicated by the customer on the letter/survey by referring customers to the SWCC, providing information about community resources and/or providing job referrals,
  - d. Attempting to contact Non-responsive customers (employment status update letter/survey not returned) at least three times.

### **ADDITIONAL INFORMATION:**

1. SETA MIS staff will provide case managers and Site Supervisors with quarterly Follow-up Due rosters. SWCC staff will use the reports to complete and enter quarterly Follow-up forms on a timely basis.
2. SETA will allow for Flex Schedules to provide Job Retention services, and allow Site Supervisors to delegate appropriate customer contact activities (i.e. updating alternate contact person, verifying employment status) to clerical staff.
3. Wages of customers employed in the following areas may not be reported in the EDD base wage file: Federal employment, Postal service, Military,. Railroad, Out of State employment, and some employment where earnings are primarily based on commission. It is important SWCC staff maintain regular contact with these customers and collect written verification of supplemental employment data in the first and third quarters after Exit. (e.g. W2, pay stub, 1099, employer verification letter)

## Sacramento Employment and Training Agency Post-Exit Job Retention Chart

**1<sup>st</sup>  
Quarter**

<p><b>Month 1</b></p> <ul style="list-style-type: none"> <li>During <b>the</b> first week, contact customers who exited in the previous quarter.</li> <li>Regular Monthly contact</li> </ul>	<p><b>Month 2</b></p> <ul style="list-style-type: none"> <li>Regular Monthly contact</li> </ul>	<p><b>Month 3</b></p> <ul style="list-style-type: none"> <li>Regular Monthly contact</li> <li>Complete Follow-up Form (WIA EWIF)</li> </ul>
<p><b>1<sup>st</sup> Quarter after Exit – Entered Employment Quarter (Customer <u>must</u> work at least 1 day for a positive outcome.) Non-cash <i>Benchmark</i> Incentives available</b></p>		

**2<sup>nd</sup>  
Quarter**

<p><b>Month 1</b></p> <ul style="list-style-type: none"> <li>During <b>the</b> first week, contact customers who exited in the previous quarter.</li> <li>Regular Monthly contact</li> </ul>	<p><b>Month 2</b></p> <ul style="list-style-type: none"> <li>Regular Monthly contact</li> </ul>	<p><b>Month 3</b></p> <ul style="list-style-type: none"> <li>Regular Monthly contact</li> <li>Complete Follow-up Form (WIA EWIF)</li> </ul>
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**3<sup>rd</sup>  
Quarter**

<p><b>Month 1</b></p> <ul style="list-style-type: none"> <li>During <b>the</b> first week, contact customers who exited in the previous quarter.</li> <li>Regular Monthly contact</li> </ul>	<p><b>Month 2</b></p> <ul style="list-style-type: none"> <li>Regular Monthly contact</li> </ul>	<p><b>Month 3</b></p> <ul style="list-style-type: none"> <li>Regular Monthly contact</li> <li>Complete Follow-up Form (WIA EWIF)</li> </ul>
<p><b>3<sup>rd</sup> Quarter after Exit – Employment Retention Rate Quarter (Customer <u>must</u> work at least 1 day for a positive outcome.) Non-cash <i>Benchmark</i> Incentives available</b></p>		

## SMARTware Adult/Dislocated Worker Activity Breakdown Table

Activity Name	Activity Department	Activity Category	Activity Status	Role	*Common JTA Codes	Notes
<b>Core</b>	▶ Intake Pool	Active in Pool	Active	Intake Pool Manager	NA	Default status of customers entered into SMARTware.
		Employed	Complete	Intake Pool Manager	NA	Customers employed from Core Services. Would <u>not</u> show in Pool.
		Inactive	Complete	Intake Pool Manager	NA	Customers removed from Intake Pool. Would <u>not</u> show in Pool.
<b>Intensive</b>	<ul style="list-style-type: none"> <li>▶ 11 Intensive Departments</li> <li>▶ One department for each career center</li> <li>▶ e.g. (S,DLP) Intensive</li> </ul>	Active	Active	Case Manager	Enrollment Codes: 15, 30, 41, 42	Customers receiving Intensive Services. Implies pre-employment.
		Employed	Active	Case Manager	Enrollment Code: 10	Customers employed from Intensive Services. Implies pre-exit.
		Exited	Active	Case Manager	Exit Codes: 1, 2, 5, 6, 7	Customers exited from Intensive Services. Implies post-exit. Follow-up time frame begins.
<b>Intensive/ Training</b>	<ul style="list-style-type: none"> <li>▶ 11 Intensive/Training Departments</li> <li>▶ One department for each career center</li> <li>▶ e.g. (S,DLP) Intensive/Training</li> </ul>	Active	Active	Case Manager	Enrollment Codes: 54, 55, 59, 60, 61	Customers receiving Intensive/Training Services. Implies pre-employment.
		Employed	Active	Case Manager	Enrollment Code: 10	Customers employed from Intensive/Training Services. Implies pre-exit.
		Exited	Active	Case Manager	Exit Codes: 1, 2, 5, 6, 7	Customers exited from Intensive/Training Services. Implies post-exit. Follow-up time frame begins.