



INDIANA
WORKFORCE
DEVELOPMENT
AND ITS **WorkOne** CENTERS
FORMAL COMMUNICATION

TO: Indiana's Workforce Investment System

FROM: Doug Martin, Director
Field Systems

DATE: January 27, 2010

Technical Assistance Bulletin
TAB 2009-01

Protocol for Transferring a Participant from a Workforce Region or Marion County

Purpose

To update the protocol to follow when transferring a participant from one workforce region or Marion County to another

Rescission

Track One – Technical Guidance Bulletin (TTGB) 2006-16 entitled, “Update to Protocol for Transferring Clients between Regions,” issued February 7, 2007

Content

A participant can be transferred from one workforce region or Marion County to another if both Regional Operators and One-Stop Operator (both referred to now as “director”) agree. In this case, the two directors should document their agreement and instruct the transferring master user to make the change in the participant’s case notes. The case note should include the date of agreement and the text of the directors’ agreement when possible. The preferred documentation for the case note would be to cut and paste the e-mail or other correspondence regarding the agreement between the two directors into the body of the case note.

Once this process is completed, the participant will only appear in the receiving area’s performance and will be eliminated from the transferring area’s performance. The transferring director should retain the records for the client being transferred. The receiving director will create new records for the participant.

Special Note

The participant will not be a new enrollment for the receiving region or Marion County. The receiving region or Marion County will assume case managing the participant and the original participation date will not change.

Contact Person

Doug Martin, Director of Field Systems
Indiana Department of Workforce Development
10 N. Senate Avenue, Indianapolis, IN 46204
Email: DWMartin@dwd.in.gov

Previously issued Technical Assistance Bulletins can be reviewed on the Indiana Department of Workforce Development’s website at <http://www.in.gov/dwd/2554.htm>.