

WAI 2 Technical Assistance Session

Date: Monday, August 4, 2025

Time: 11:00am – 12:00pm

- A. Welcome
- B. ASSET Data Entry Error Resolution
 - a. The ASSET data entry error has been resolved.
 - b. Please submit staff requests to correct any inaccurate service entry dates.
- C. Staff Requests
 - a. WAI staff requests follow a different process than WIOA program requests.
 - b. You will not need to select an approver, and the request will not appear under "My Staff Requests" after submission.
 - c. Once received by staff, requests will reflect a status of: **Completed, Denied, or Needs More Info.**
- D. Follow-Up: Low-Income Criteria for Targeted Population Barriers
 - a. Use the [2025 Federal Poverty Guidelines and Lower Living Standard Income Level Guidelines](#)
 - b. Follow [WIOA Low-Income Guidance](#). 100% FPL or 70% LLSIL **family** income
 - c. **Do not use the 200% threshold used for unemployed worker program eligibility*
- E. Transitioning Participants Between Programs
 - a. End/Start Dates: Ensure the end date of the first grant's services and the start date of the second grant's services are clearly documented in both case notes and service entries.
 - b. Service Closure and Re-Entry: Close out all active services under the initial grant before initiating new services under the second grant—even if the service type is the same (e.g., WEX or training).
 - c. Funding Source in Case Notes: Clearly indicate in the case note when the funding source changes, and specify any shift in responsibilities (e.g., which program covers training costs vs. support services).
 - d. Update the Individual Employment Plan (IEP) to reflect the new funding stream, including rationale for the transition and any adjustments to goals or timelines.

- e. Supporting Documentation: Upload any new eligibility documentation required by the receiving program. Don't assume materials from the original grant will automatically suffice.
- f. Ensure proper cost allocation and tracking and alignment with program end/start dates.

F. ESS Acknowledgement Sections

- a. Question: Should ESS remain in "Created" status, or be marked as "Acknowledged" outside of CEPT?
- b. Answer: Mark as "Acknowledged" with a case note indicating that CEPT acknowledgment is not necessary.

Acknowledgment Section

This calculation was acknowledged by the career planner and participant outside of the CEPT application.

G. Ensure demographics entered into Program tab align with those attested to on application

- a. Question: "If a case is already in ASSET (open for WIOA) – should we update entries made by the Career Planner. In our example during the WIOA enrollment process he identified as Asian, but on WAI application it is listed as OTH – do we make the change or leave it as it is in ASSET?"
- b. Answer: Do not change entries made by prior career planners.
 - i. Instead, ensure that demographic information under the WAI program reflects the participant's self-attested information at the time of WAI enrollment.

H. Additional questions from the group

I. Upcoming Sessions

- a. WAI Technical Assistance sessions will be taking a pause while I am out on maternity leave.
- b. The WAI mailbox will continue to be monitored; please submit any technical assistance requests there for individual follow-up.
- c. Next scheduled session: Monday, October 13, 2025 @ 11:00am