West Central Region Local Policy	
Subject: Case Management Policy	**Release Date:** 1/22/2025
Reference:	**Revision:**

Case Management

Staff who provide case management have the following expectations:

- Ensure customers receive the best customer service
- Ensure customers receive prompt, courteous service.
- Provide customers with the full array of available services including basic, individualized, and training services according to participant need.

Electronic File Management

Case managers are expected to upload all applicable documentation (with the exception of medical, legal, and confidential information) into the statewide case management system (Mo Jobs). Documents should be uploaded with the appropriate naming convention and in the applicable file type. Confidential, medical, or legal information should be uploaded to Sharefile in a confidential folder.

Case Notes

Case managers are expected to follow the case noting requirements set forth in the current issuance from the Office of Workforce Development (OWD). This issuance requires that case notes are entered on the date of contact or the date services were provided. If time does not allow, case notes may be entered the next business day.

Monthly Contact

Case managers are expected to maintain monthly contact with all WIOA participants. At a minimum, two contact attempts must be made and different contact methods should be utilized. Contact or contact attempts must be documented in case notes in MO Jobs.

Participants in training services must be contacted to determine training progression. Case managers can utilize the monthly contact to determine progress in training and offer additional services and resources if needed.

Youth participants enrolled in work experience, attending high school, or working on obtaining their HISET/GED must be contacted to determine progress and offer additional services and resources if needed.

Follow Up

Expectations and requirements for follow up can be found in the local follow up policy for WIOA participants.