	New Mexico Workforce Connection SW NM	**SOP #**	2
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SOP Owner	One-Stop Operator	**Approval**	Peter Martinez

Standard Operating Procedure

New Mexico Workforce Connection Customer Flow Process

Purpose

This Standard Operating Procedure (SOP) provides information to revise current customer flow process at New Mexico Workforce Connection (NMWC) centers in Southwest New Mexico. The SOP will ensure we are assessing and referring customers through a uniform and consistent process.

Policy

Per the stipulations of WIOA and the contract between SAWDB and EWS the development of procedures and processes must be consistent with that of customer focused services. This requirement encompasses the use of a formal triage system that determines the needs and resources available to the customer. The creation of referrals should stem from this initial assessment process.

Who Is Involved

New Mexico Workforce co-located partners.

Procedure

Section 1: Initial greeting

Sub-Section A: NMWC front desk personnel responsibilities

1. The front desk personnel are responsible for greeting customers and determining the services the customer requires. As well as determining if the customer is registered in the New Mexico Workforce Connection Online System (NMWCOS).
    a. The font desk personnel will use the New Mexico Workforce Connection Visitor Form to sign in all customers.
    b. The front desk personnel should ask probing questions to determine the customer reason for visiting the NMWC center. Once the front desk personnel have determined the need of the customer, the front desk personnel will notify a Title III Career Consultant to triage the customer needs in further detail.

Section 2: Customer triage and referral process

Sub Section A: NMWC Title III Career Consultant Responsibilities

1. Once the Career Consultant assesses the customer and determines the customer only requires Employment Services the Career Consultant will:
    a. Ensure NMWCOS registration is completed.
    b. If NMWCOS account exists Career Consultant will ensure customer account is up to date.
    c. Ensure Wagner-Peyser application is completed.
    d. Career Consultant will provide all necessary employment services and maintain case management until customer employment needs are met.

2. If the Career Consultant determines the customer requires a referral to Adult/Dislocated Worker or Youth programs the Career Consultant will:
    a. Complete Eligibility Explorer application via NMWCOS and ensure the 211-activity code is entered in NMWCOS.
    b. When Adult/ Dislocated Worker staff or Youth staff are available, the Career Consultant will provide a warm hand off to either Adult/Dislocated Worker staff or Youth staff.
    c. If either Adult/Dislocated Worker staff or Youth staff are unavailable the Career Consultant will complete the provider referral via NMWCOS. **Note: no email should be sent to Adult/ Dislocated Worker Manager or Youth Manager. Referrals will be managed via 211 activity report.**

Sub Section B: WIOA Title I Adult/Dislocated Worker and Youth responsibilities

1. Adult/Dislocated Worker and Youth programs will pull the 211 activity report daily, customers will be assigned to a Talent Development Specialist (TDS) to assist the customer. Customers can except to be contacted by a TDS within 72 hours.
2. If TDS determines the customer meets eligibility requirements the TDS will review Eligibility Explorer queue and convert the Eligibility Explorer application. If customer does not meet eligibility requirements the TDS will delete the Eligibility Explorer application from the queue.
3. Customers who meet eligibility requirements for Adult/ Dislocated Worker or Youth will be assisted by the assigned TDS until the duration of the program.
4. If the TDS determines the customer requires assistance from another partner program the TDS will complete the provider referral via NMWCOS.

Sub Section C: All other co-located and required WIOA partners responsibilities

1. All other co-located and required partners who have access to NMWCOS will complete the provider referral via NMWCOS when making a referral to another partner program.
2. Partners who do not have access to NMWCOS will send an email to the point of contact (POC) of the referral receiving partner.
3. Warm hand off should be initiated if partner staff is available. In the event partner staff is unavailable the provider referral will be completed for partners who have access to NMWCOS. For partners who do not have access to NMWCOS an email will be sent to partner POC.