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Emailed 03/14/07 (cg)

**Bureau of Workforce Programs (BWP)**  
**Policy Issuance (PI) No. 06-30**

**Date:** March 14, 2007

**To:** Michigan Works! Agency (MWA) Directors

**From:** Brenda C. Njiwaji, Director, Bureau of Workforce Programs **SIGNED**

**Subject:** Participant Transfer Guidelines

**Programs Affected:** Workforce Investment Act (WIA)  
Trade Adjustment Assistance (TAA)  
Work First

**References:** WIA of 1998  
The Trade Act of 1974, as amended  
The TAA Reform Act of 2002  
Deficit Reduction Act of 2005  
Public Act 345

**Rescissions:** None

**Background:** The One-Stop Management Information System (OSMIS) has been altered to include a participant transfer utility for use by local MWAs. This PI provides guidelines for the use of this utility.

**Policy:** Due to the implementation of the Common Measures, it is no longer possible for an MWA to exit an individual from the OSMIS simply because that individual wishes or needs to complete their program participation with another MWA. As a result, a utility has been added to the OSMIS to allow for a transfer of record ownership between two MWAs.

Prior to the occurrence of any participant transfer in the OSMIS, authorized representatives of **both** MWAs must agree to the transfer. In addition, both MWAs must maintain documentation in their files indicating that the completed transfer was agreed upon. This requirement can be met in one of three ways:

1. By completing the *OSMIS Participant Transfer Authorization Form* attached to this PI; or
2. By completing a similar form of local design; or
3. By retaining copies of electronic correspondence (i.e., e-mails)

At this time, the BWP is not establishing policy concerning the actual **physical** transfer of participant records from one MWA to another. That issue will need to be resolved by the MWAs involved in the transfer **prior** to the use of the transfer utility.

MWAs requiring documentation of provided services for audit trail purposes for participants who have transferred from one MWA to another should contact [implementation@michworks.org](mailto:implementation@michworks.org) to request any necessary information.

**Action:** MWAs shall ensure that the requirements outlined in this PI are immediately incorporated into their local programs.

**Inquiries:** Questions regarding this PI should be directed to Ms. Dell Alston, Director, Workforce Training & Development Division, at (517) 335-5858.

This PI is available for downloading from the Internet system. Call Ms. Cynthia Grostick at (517) 335-7418 for details. The information contained in this PI will be made available in alternative format (large type, audio tape, etc.) upon special request to this office.

**Expiration  
Date:**

Continuing

BCN:KJ:cg  
Attachment

**Michigan Department of Labor & Economic Growth  
Bureau of Workforce Programs**

**OSMIS Participant Transfer Authorization Form**

Participant Information

**First Name:** \_\_\_\_\_

**Last Name:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_

**Registration Date:** \_\_\_\_\_

**Affected Program(s):** \_\_\_\_\_

Originating MWA Information

**Originating MWA:** \_\_\_\_\_

**Printed Name of  
Authorized  
Representative:** \_\_\_\_\_

**Signature of Authorized  
Representative:** \_\_\_\_\_

**Date of Signature:** \_\_\_\_\_

Receiving MWA Information

**Receiving MWA:** \_\_\_\_\_

**Printed Name of  
Authorized  
Representative:** \_\_\_\_\_

**Signature of Authorized  
Representative:** \_\_\_\_\_

**Date of Signature:** \_\_\_\_\_