

Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

OPERATIONAL DIRECTIVE

FRWIB OD # 06-16

Date Released: July 1, 2016

To: All Fresno Regional Workforce Development Board AJCC Partners and Service Providers

From: Blake Konczal, Executive Director

Effective Date: July 1, 2016

Subject: America's Job Centers of California (AJCC) Partner Referral Process

Applicable Program: All

Revision History: Initial Release

This Operational Directive (OD) replaces the referral process described in OD 35-05, Partner Co-Enrollment and Referral Process. This OD obsoletes Form REG-102, Universal Referral Checklist and adds updated referral forms.

Partners may be required to use their own Release of Information form, instead of the Universal Release of Information (Form REG-100) when making referrals to other Partners. Those Partners are required to identify the approved form to be used when referring clients from their organization.

Purpose

As mandated by the Workforce Innovation and Opportunity Act (WIOA), each Local Workforce Development Area (LWDA) is required to have a documented process for referrals between partner agencies, as defined by WIOA (mandated partners) and the local Board as AJCC partners (local one-stop partners).

The intent of a referral activity is to ensure that needed services for a client are provided through the most appropriate funding stream in the most efficient manner and are not duplicative. The client should have an experience that is as seamless as possible.

This OD describes, on page 2, the steps to be taken to facilitate a referral between any Partner agency, including any of Fresno County's WIOA-funded programs, and to track the outcome of those referrals.

Each partner is required to identify all departments that provide the services described in their individual Partner Memorandum of Understanding (MOU) with the Fresno Regional Workforce Development Board. Additionally, each partner and sub-contracted provider of service is required to identify a single point of contact (SPOC) for all referrals to their agency and their full contact information (telephone number and email address). The FRWDB Quality Systems Manager will be responsible for maintaining and disseminating this information.

PROCESS

Level I – Referrals to other partners or community services for perceived or stated needs of clients. Use Form REG-108. There will be no follow-up for Level I Referrals. Referrals will be counted and reported, when appropriate.

Level II – Direct referral between partners for specific services. Use Form # REG-109. Referring partner will fill out the form, contact the referred to agency single point of contact (SPOC) and make appointment for client if

appropriate. Referral to be scanned to referred agency and copy given to client. Review the referral with the client. Referring Partner will file the original referral form.

If any questions, please contact the FRWDB Program Manager.

Forms: [REG-100](#) – Universal Release of Information (Partners may require the use of their own Release of Information form in order to release client specific information).

[REG-101](#) – Agency Summary of Services Checklist

[REG-104](#) – Interest Checklist

[REG-108](#) – AJCC Partner Referral – Level I

[REG-109](#) – AJCC Partner Referral – Level II

