

# Fresno County Workforce Investment Board

3302 N. Blackstone Ave., Suite 221 • Fresno, California 93726 • 559.490.7100 • Fax 559.490.7199 •  
www.workforce-connection.com

Blake G. Konczal, Director

## OPERATIONAL DIRECTIVE

FCWIB OD # 09-06

Date Released: February 2, 2006

To: All Fresno County Workforce Investment Board (FCWIB) Providers of Services and Partners

From: Blake G. Konczal, Director

Effective Date: February 2, 2006

Subject: Provider Co-Enrollments

Applicable Program: All

This Operational Directive (OD) documents the allowed provider co-enrollment scenarios and the criteria for co-enrolling clients between contracted providers of services and/or into multiple funding streams. This OD also releases Work Instruction PGM-REG-002, Provider Co-Enrollment Process.

Providers of services are to implement this OD immediately.

### Workforce Investment Act (WIA) Co-Enrollments that are allowed:

- Older Youth and Adult or Dislocated Worker (same provider or different provider);
- Any non-85% WIA formula grant and either the Adult or Dislocated Worker 85% formula funds grants (same provider or different provider);
- Any WIA funding streams that are awarded to the same provider, except Adult and Dislocated Worker,
  - i.e.: Dislocated Worker and Veterans Assistance
- Any other co-enrollment strategy directed by the FCWIB Assistant Director, as documented.

### Criteria for Co-Enrolling clients involving 2 or more providers:

- Primary (initiating) provider cannot provide the services needed by the client that are available from the co-enrolled (receiving) provider;
- Client must meet any eligibility requirements for the services provided by the co-enrolled provider;
- Initiating provider wants to remain as primary service provider to the client;
- Client wishes to have primary provider to remain as primary service provider.

### Critical Points:

- Services can not be duplicated between providers and/or funding streams, with the following exception:
  - In almost all cases, both providers or funding streams would have case management activities opened at the same time. This is not considered duplication of service since the case management performed by the co-enrolled provider or funding stream deals strictly with the service(s) they provide only.

Overall management of the client's program is the responsibility of the primary provider.

- The co-enrolled agency must document the activities and services they provide to the client utilizing the I-Train case management system.
- The co-enrolled agency will maintain a separate hardcopy case file for the client that holds only that supporting documentation related to the co-enrollment.
  - In the case where both providers are co-located, they may agree to maintain one hardcopy case file.
  - In the event that either provider is asked to produce a co-enrolled client's hardcopy case file by FCWIB staff, state, or federal authorities, they are required to produce both case files within 24 hours.

If you have any questions, please contact your contract administrator.

Attachment:

[PGM-REG-002](#), Provider Co-Enrollment Process