Fresno Regional Workforce Investment Board

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OPERATIONAL DIRECTIVE

FRWIB OD # 12-13, Revision B **Date Released: April 17, 2014**

To: All Fresno Regional Workforce Investment Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: April 17, 2014

Subject: Adult/Dislocated Worker OJT Follow-up Process and Supplemental Data Collection

Applicable Program: Adult, Dislocated Worker

Revision History: Initial Release – 7/10/13

This Operational Directive (OD) documents the process for conducting follow-up for On the Job Training activities and Supplemental Data Collection.

This Revision B adds guidance for retention caseload management and obsoletes OD 05-05, Retention Caseload Creation Management.

Follow-up Activity

- This activity begins after the customer has been exited from WIA.
- Follow-up is only required for all Customers who have successfully completed an OJT and exited as placed with the OJT employer.
- Follow-up is optional for job seekers who are placed with employers who do not report to the State Base Wage Table or are self-employed at exit, for the purpose of collecting supplemental data.
- All Follow-up activities are to be completed by the end of the first, second, third, and fourth quarters after exit for each respective quarter.
- When performing follow-up with job seekers or employers, if it is determined that a job seeker is no longer working, providers of services staff are required to document the reason the job seeker is no longer working in the case notes.

Follow-up Guidelines

Whichever staff member(s) are given responsibility for post exit follow-up, that person must enter their ID into the "Retention ID" field on the Workforce Investment Act (WIA) application in I-Train.

Retention Specialist is defined as the staff member(s) responsible for conducting post exit follow-up activities.

Once the job seeker has been exited from the WIA program, the ERS (or designated staff) is to conduct regular follow-up contacts as follows:

- Quarter 1, Quarter 2, Quarter 3 and Quarter 4
    - In the event that a job seeker cannot be located after three attempts, the results are to be case noted for each quarter.
    - There is no activity code associated with Post-Exit Follow-up
    - Complete the form in I-Train to show the activity has taken place
    - When contacting the job seeker, the ERS (or designated staff) is to also document any changes in contact information.
- After the Quarter 4 contact is made, the case file is to be closed and archived per Operational Directive 10-12, Record Retention and Storage.

FOLLOW-UP CONTACT DOCUMENTATION

Within the follow-up screen on I-Train is a hyperlink entitled “Contact Attempts.” This “Contact Attempts” screen is used to assist retention staff with documenting each contact and when the next contact attempt should be made. The screen also provides the contact information that is currently in I-Train.

Any changes in contact information must be documented on the WIA application in I-Train. Provider staff is to use the Contact Attempts screen for this purpose. Each contact attempt and results must also be documented in case notes.

The color codes on the I-Train follow-up screen are as follows;

- Gray means the follow-up does not need to be completed.
- Red means the follow-up is not completed.
- Yellow means a contact attempt has been documented and three days have not yet passed since that last attempt.
- Pink means that three days have passed since the last contact attempt.
- Green means that the follow-up has been completed.

SUPPLIMENTAL DATA COLLECTION

Supplemental data is collected for the purpose of documenting employment with employers who do not report wages to the State Base Wage Table, including self-employment, schools and other government employers, and out-of-state employment.

Supplemental Data Collection Guidelines

- Fields 7, 8, 9 on the I-Train follow-up form are for documenting employment status for this purpose, for each particular quarter.
    - Fields 7, 8, 9 – Use the following two choices when using supplemental data collection;
    - 1 – Employed – the participant was found to be employed in the particular quarter
    - 2 – Not Employed – the participant was not found to be employed in the particular quarter
- Documentation is required to verify the job seeker’s employment.
    - Employment information and status is to be case noted and must include at a minimum, the employer’s name and a period of time during the quarter during which the participant was employed.

Please address all questions to the FRWIB Program Manager.