

Fresno Regional Workforce Investment Board

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OPERATIONAL DIRECTIVE

FRWIB OD # 35-05, Revision B

Date Released: August 19, 2014

To: All Fresno Regional Workforce Investment Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: August 19, 2014

Subject: Partner Co-Enrollment and Referral Process

Applicable Program: All

Revision History: Initial Release – 11/30/05

This Revision B updates, incorporates and obsoletes work instruction PGM-REG-001, Partner Co-Enrollment and Referral Process; updates all linked forms and updates references and terminology to current usage.

Process Overview

This process describes the steps to be taken to facilitate a Co-Enrollment, Direct Referral or Case Management Referral between any Partner agency and any of Fresno County's Workforce Investment Act (WIA) funded programs.

The intent of a Co-Enrollment or Referral activity is to ensure that needed services for a customer are provided through the most appropriate funding stream, and are not duplicative.

This process begins when a Partner agency or a WIA-funded agency has identified a customer who can benefit from the services of another agency, in addition to the services provided by their own agency.

This process ends when the customer is enrolled into WIA Staff-Assisted or higher services, or is not enrolled for cause.

Definitions

Co-Enrollment – The process used to provide services from multiple funding streams simultaneously, without duplicating services or efforts. The referring agency maintains the primary case management responsibilities, and the referred-to agency has secondary case management responsibilities.

The referring agency has performed assessments and developed an Individual Employment Plan (IEP). The referred-to agency will accept those assessment results and work with the referring agency's IEP. All clients that are co-enrolled will be required to take the WorkKeys® assessments. The referred-to agency does not have to accept the client into the program based on cause.

Agencies who would use this process include (but not limited to): Department of Rehabilitation (DOR), Migrant Seasonal Farm Workers (MSFW), Older Youth, Fresno and County Department of Social Services (DSS) - CalWorks only.

Direct Referral – The process used to enroll clients into WIA when services such as case management and/or assessments are not available by the referring agency. The WIA Provider of Services has full ownership of the client, once accepted into the WIA program. The referring agency is no longer involved with the client at the point of enrollment into WIA. There is no formal co-management of a client (no exchange of data or other information after the referral is accepted).The referred-to agency does not have to accept the client into the program based on cause.

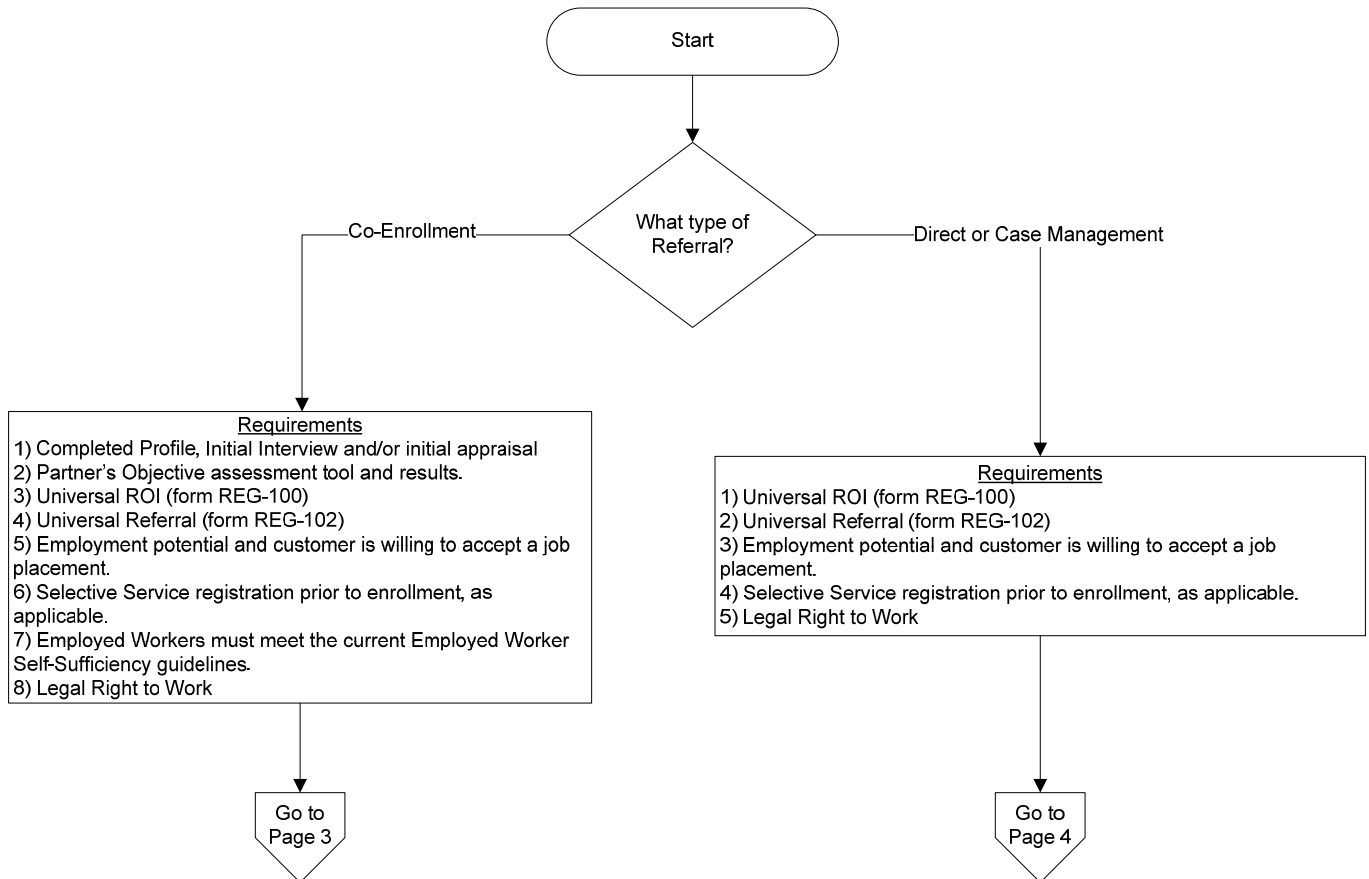
Case Management Referral – Same as Direct Referral with the following exception: The referring agency has secondary case management responsibilities, and the referred-to agency has primary case management responsibilities. Any partner agency could use this process.

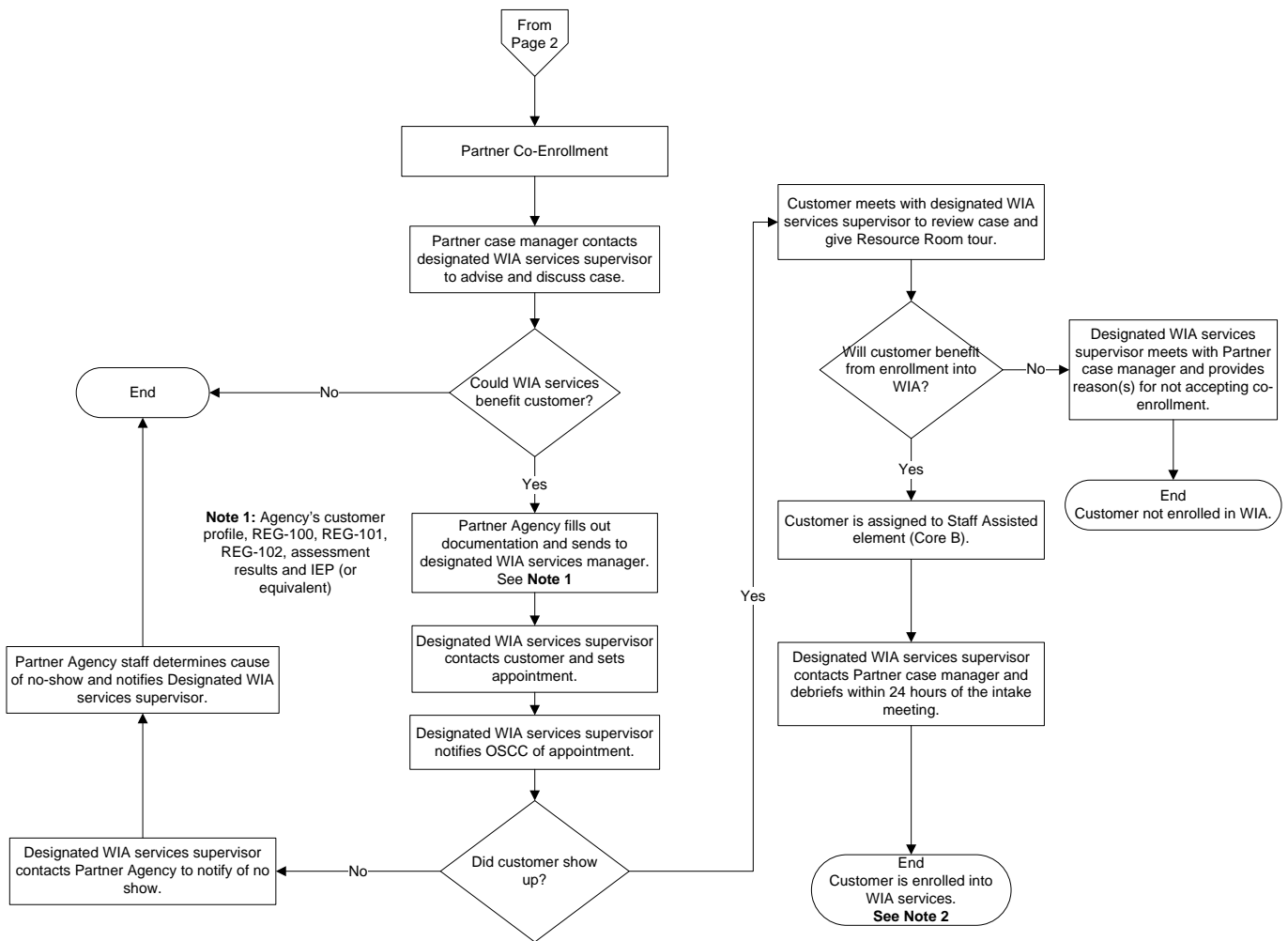
Agencies who would use this process include (but not limited to): Community Colleges or some departments within the Employment Development Department (EDD).

The process flow begins below and continues through page 4.

FORMS:

- 1) [REG-100](#) – Universal Release of Information
- 2) [REG-101](#) – Agency Summary of Services Checklist
- 3) [REG-102](#) – Universal Referral Checklist
- 4) [REG-103](#) – Customer Profile (to be used only when I-TRAIN is not available)
- 5) [REG-104](#) – Interest Worksheet





Note 1: Agency's customer profile, REG-100, REG-101, REG-102, assessment results and IEP (or equivalent)

Note 2: Partner case manager is lead case manager. WIA ERS/ACA is provides regular updates to Partner case manager.

