

# Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

## OPERATIONAL DIRECTIVE

FRWDB OD # 14-18

Date Released: May 29, 2018

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: July 1, 2018

Subject: CalJOBS Follow-up Process

Applicable Program: All

Revision History: Initial Release

This OD supersedes OD 05-15, Follow-up, effective July 1, 2018.

Providers of services are to implement this process effective immediately.

### Follow-up

Follow-up is required for all customers, with the exception of those categorized as Exclusionary exits.

Follow-ups are performed to capture outcome data that occurs during each of the post-exit quarters.

Each follow-up begins after the end of the applicable post exit quarter and must be completed 30 days after the end of the applicable post exit quarter.

Example for a participant exiting between January 1st and March 31st:

Exit Quarter		Follow-up Timeline			
Jan – Mar		1 <sup>st</sup> Quarter after Exit	2 <sup>nd</sup> Quarter after Exit	3 <sup>rd</sup> Quarter after Exit	4 <sup>th</sup> Quarter after exit
	Follow-up Periods	Apr – Jun	Jul-Sep	Oct-Dec	Jan-Mar
	Follow-up Dates	1 <sup>st</sup> follow-up due Jul 1-30	2 <sup>nd</sup> follow-up due Oct 1-30	3 <sup>rd</sup> follow-up due Jan 1-30	4 <sup>th</sup> follow-up due Apr 1-30

When performing follow-up with participants or employers, if it is determined that a participant is no longer working, providers of services staff are required to document the reason the participant is no longer working in the case notes.

Providers must ensure that exited participants receive appropriate services as identified and deemed necessary during the follow-up period. These services are to be documented in the case notes.

The final exit date may be different than the Closure Date if the participant has received any WIOA services during the 90 day closure period (see OD 15-18, CalJOBS Post-Closure Process).

**It is the provider's responsibility to monitor the participant's final exit date to identify when to begin post exit follow-up.**

### **Follow-up Guidelines**

Once the participant has been exited from the WIOA program, the designated staff is to conduct regular follow-up contacts as follows:

- Quarter 1, Quarter 2, Quarter 3 and Quarter 4
  - The follow-up data must be input into CalJOBS within 30 days of the follow-up due date.
  - At least 3 different attempts to contact participants must be made within the 30 day period or until contact has been established.
    - These attempts must be documented and reflect that they are made on different days and times.
  - In the event that a participant cannot be located, the results are to be case noted and entered in the follow-up section for each quarter.
- There is no service code associated with Post-Exit Follow-up
- Complete the follow-up section in CalJOBS to show that the follow-up has been completed.
- When contacting the participant, the designated staff is to also document any changes in contact information.

After the Quarter 4 contact (or attempt) is made, the case file is to be closed and archived per Operational Directive 10-04, Record Retention.

### **Follow-up Contact Documentation**

The Follow-Up Screen provides the contact information (address and prime phone) that is currently in CalJOBS. Any changes in contact information must be documented using the Edit Contact Information screen. Within the follow-up screen on CalJOBS is a hyperlink entitled "Contact Attempts." This screen is used to assist with documenting each contact. Provider staff is to use the Contact Attempts screen for this purpose. Each contact attempt and results must also be documented in case notes.

Please contact the FRWDB Program Manager with any questions.