

Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

OPERATIONAL DIRECTIVE

FRWDB OD # 19-18, Rev A1

Date Released: June 19, 2018

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: July 1, 2018

Subject: CalJOBS Participant "Plan"

Applicable Program: All

Revision History: Initial Release

This Operational Directive (OD) supersedes OD 18-05, Individual Employment Plan and OD 17-15, Youth Individual Service Strategy, effective July 1, 2018 due to the CalJOBS transition.

In CalJOBS, the **Individual Service Strategy (ISS)**, **Individual Employment Plan (IEP)** and **Objective Assessment (OA)** use the same document format and is now known as **The Plan**

This Operational Directive (OD) references the following:

OD 31-06	Participant Contact
OD 12-15	WIOA Adult Program Flow
OD 11-17	WIOA Youth Program Flow – Out-of-School (ages 18-24)
OD 13-15	WIOA Youth Program Flow – In-School (ages 14-21)
OD 18-18	Supportive Services Process
OD 23-05	Career Track Process
OD 06-18	Case File Security
OD 03-16	Youth Service Codes
OD 04-16	Adult Service Codes

Overview

The Plan is an individual strategy for academic, career exploration, training and placement services to participants under the Workforce Innovation and Opportunity Act (WIOA).

The Plan must include the appropriate combination and sequence of Goals and Objectives for the participant, based on the results of the objective, academic and other comprehensive career assessments. Services and referrals must be reflective of the Goals and Objectives in the Plan.

The ERS/ACA must schedule an in-person meeting with the participant to develop the initial Plan.

When completing this Plan, the ERS/ACA must be keenly aware of their responsibilities to advise, counsel, accommodate, coordinate, and disseminate information relative to the services available to meet the needs of the participant. The ERS/ACA must also be mindful of the concept of informed customer choice. All decisions concerning appropriate services must be participant-centered and must ensure that the participant is not excluded from their choice of career and training options, provided those options are locally defined demand occupations and supported by the results of the Objective Assessment. The participant must be active in the development of the Plan. It must be reviewed periodically to evaluate the progress of the participant in meeting the Objectives and Goals of the service strategy and the adequacy of the supportive services provided.

Development of the “Plan”

The “Plan” consists of 2 Sections, the Objective Assessment and the Individual Employment Plan/Service Strategy (IEP). Complete each section as follows:

1. Objective Assessment

The Objective Assessment (OA) Interview is a chance for staff to talk realistically with the participant about their specific needs, their current situation for the purpose of identifying appropriate services, skills, and career pathways.

Youth:

Once determined eligible for WIOA, the ACA must complete the OA interview.

Adult:

During the initial Plan meeting, conduct the OA Interview.

The OA itself is to be conducted by ACA/ERS. Additional provider or partner staff is recommended but not required.

Topics to be covered are:

- Basic Skills- Reading and Math Levels
- Occupational Skills
- Prior Work History
- Employability
- Vocational Interest
- Supportive Services Needs
- Developmental Needs
- Special Accommodations

These topics are covered in the tabs in CalJOBS for Objective Assessment.

These tabs are:

- General
 - This section is used to document participant information.
- Expectation
 - This section is used to document program expectations
 - If employment is an Expectation, all of the employment data must be completed.
- Education
 - This section documents Education history and Basic Skills data.
- Degree
 - This section documents degree information the participant already possesses.
- Certificate

- This section documents certificate information the participant already possesses.
- Employment
 - This section documents applicable skills and employment history.
- Work Readiness
 - This section documents various participant attributes that affect their ability (including soft skills) to obtain employment.
- Barriers
 - This section documents a variety of barriers and needs that the participant has.
- Tests
 - This section documents the various assessments the participant has taken.
 - Note: O*NET and WorkKeys results are to be input into the Testing Results comment box.
- Referrals
 - Not required to complete this section.

The ACA/ERS is required to document all OA Interview responses in the corresponding CalJOBS Objective Assessment Summary (all questions in the Summary must be answered) and case note the provision of the service. Also open/close the appropriate service codes: Objective Assessment Code (adult: 203; youth: 412); Plan Development (Adult – 205 Youth 413).

Management of the OA

As the participant's situations/barriers change, the OA must be updated. If a barrier or situation is resolved or removed, do not remove the issue from the OA.

2. Individual Employment Plan/Service Strategy (IEP)

The IEP consists of four (4) sections:

- Plan
 - Input the required information
- Goals
 - Select participant Goal Type
 - Employment
 - Training
 - Schooling
 - Select Term of Goal
 - Short Term
 - Long Term
 - Intermediate
 - Input appropriate date.
 - When goal is completed input completion date, status, and reason closed.
- Objectives
 - Tied to the documented Goal Types.
 - Complete the required fields.
 - Review Date is used to keep track of the objectives.
- Services
 - Displays the services the participant has received.

Youth Only

Youth are not considered enrolled in CalJOBS until a Service Code that starts the 90 day Clock, is entered.

- Objective Assessment (412) and Develop Service Strategies (413) DO NOT start the 90 "clock".

Plan Development Meetings

Initial Plan Meeting

Staff will meet with participant and complete objective assessment section and complete the initial IEP for the initial services provided (Academic Services, Job Ready Workshop and supportive services, if needed).

Follow-up Plan Meeting

After the completion of Job Ready Workshop, WorkKeys and O*Net assessments, staff will meet with participant to discuss next steps. ACA/ERS will provide the participant with the Career Track Application (see OD 23-05), and discuss career exploration process and schedule the next meeting to finalize the IEP.

The ERS/ACA will demonstrate for the participant the use of the following occupational research tools:

- O*Net (www.onetonline.org)
 - Enter Keyword or O*NET SOC Code in the search box
 - Click on the job title you want to research
 - On the Summary Report page click on the “Details” tab.
 - Under the “View report: row, click on “Wages & Employment” tab
 - Select a State and click “Go”
 - Print out Occupational Detail Reports
- EDD Occupational Guides (<http://www.labormarketinfo.edd.ca.gov/occguides/Search.aspx>)
 - Enter job title or key word
 - Choose the county
 - Click on the “View the Guide” button
- Careeronestop Industry Specific Videos
 - <https://www.careeronestop.org/Videos/NewCareerVideos/new-career-videos.aspx>

ERS/ACA will meet with the participant to review the completed Career Track Application with the participant. ERS/ACA uses this information to drive discussion with participant to determine appropriate career choice based on knowledge, skills and abilities. The discussion must include the areas of: emotional and physical abilities; and functional knowledge and skills that are required to be successful in their career choice. This discussion will include a review of the detailed job tasks, the “typical day in the life of...”, and specific questions that address the physical, emotional and functional requirements of the **participant’s** career choice.

If the participant is unable to resolve or lacks any of the emotional and physical abilities that are required to be successful in their career choice, staff must work with the participant to guide them to a more appropriate career. If they lack functional skills or knowledge, the staff should consider referral to appropriate remediation or training activities.

During this meeting, the ERS/ACA will finalize the IEP and obtain necessary signatures. A copy of the signed Plan is given to the participant and a PDF of the signed copy must be uploaded into CalJOBS in the case note section.

Management of the Plan

It is the responsibility of the ERS/ACA to review the Plan with the participant at least every 30 calendar days to ensure that the participant actively engages in program services successfully.

Results of these communications must be documented in case notes, describing changes, status of activities, etc. within 3 working days of the occurrence.

The ERS/ACA must ensure that goals and services provided are current and updated or reviewed every 30 days.

Please contact the FRWDB Program Manager if any questions.