

# Fresno Regional Workforce Development Board

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## OPERATIONAL DIRECTIVE

FRWDB OD # 24-18

Date Released: August 14, 2018

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: August 14, 2018

Subject: CalJOBS Fundable Activities

Applicable Program: All

Revision History: Initial Release

This Operational Directive (OD) provides guidance for CalJOBS-related processes for Fundable Activities.

This OD references the following documents:

OD 25-18	CalJOBS Skills Training Process
OD 23-18	CalJOBS On the Job Training Process
OD 20-18	Youth Work Based Learning Process
OD 03-18	Transitional Jobs
OD 18-18	CalJOBS Supportive Services Process
OD 15-12	CalJOBS Data Change Request Process

### Overall Direction

In most cases, fundable activities have the following general requirements for data entry:

- Create the activity
- Select a provider
- Update the Enrollment Costs
- Select a budget to allocate the enrollment costs
- Create a voucher – upload approved copy into CalJOBS
- Create a payment – upload approved copy into CalJOBS
  - Complete the final payment

- Deallocate remaining funds

These requirements apply to the following activities. Any specific conditions or changes to the overall direction are listed below:

- On the Job Training

- The provider that is selected is the Employer who is providing the OJT.
- If the employer does not exist the Service Provider must create the provider record for the employer. In CalJOBS go to;
  - Manage Providers
  - Create a Provider
    - Select Fresno Area Workforce Investment Corporation for LWIA/Region
    - Input the FEIN or SSN of the employer
    - Complete the name and contact information
    - Save the record
  - E-mail the name and provider number to Tim Giles & Nuvia Varela to complete creation of the employer and assigning the appropriate Program Services.
  - The Worksite must be input.
  - The voucher and payments are for the employer.

- Youth Work Based Learning

- The Provider of Service (your agency) is selected in the Provider field.
- The Worksite must be input.
- The costs include wages, payroll taxes, and worker's compensation combined as a total hourly amount.
- The voucher and payments are for your organization.

- Transitional Jobs

- The Provider of Service (your agency) is selected in the Provider field.
- The Worksite must be input.
- The costs include wages, payroll taxes, and worker's compensation combined as a total hourly amount.
- The voucher and payments are for your organization.

- Skills Training

- The provider is the school.
- The total enrollment costs must be broken out by tuition/fees, books, tools, and other
  - In the enrollment cost section, 3<sup>rd</sup> party and school are combined.
  - The division of 3<sup>rd</sup> party and school costs are found in the program listing at <https://www.it-frs.net/v2/pub/jobseeker/coursesearch.aspx>.

- If there are 3<sup>rd</sup> party expenses, two vouchers must be created. One voucher for the school costs and one voucher for the 3<sup>rd</sup> party expenses **paid for by** your organization.
- Payments will be made for each voucher if more than one voucher is needed.
- Where pay points are used, staff must calculate what the pay point amount is. The pay points are calculated on tuition/fees only.
- Supportive Services
  - Your organization is the provider.
  - The costs may be calculated (unit based or fee) differently depending on the type of supportive service.
  - Vouchers are not sent to FRWDB Fiscal as they only process supportive services payments. However, the signed voucher must be uploaded into the voucher record the same as all vouchers.
  - Payments may be made directly to the participant by checking participant when creating the voucher.

## **Common Fiscal Processes**

### Vouchers

For all training activities (On-the-Job Training, Skills Training, Transitional Jobs, Work Based Learning) the training voucher is signed by the appropriate signatories per the specific OD. The voucher must be emailed to FRWDB Fiscal Department at [trng-docs@wfc.co](mailto:trng-docs@wfc.co) within three (3) working days of the start date.

The final signed copy of the voucher is to be uploaded into the voucher via the Document Upload function.

Vouchers are not e-mailed to FRWDB Fiscal for Supportive Services.

### Payments

Payments are created for each voucher when needed. The payment must be approved by Service Provider management and e-mailed with backup documentation to [trng-docs@wfc.co](mailto:trng-docs@wfc.co) for training activities.

E-mail Supportive Services payments to [sus-docs@wfc.co](mailto:sus-docs@wfc.co). There is no requirement to send backup documentation for Supportive Services, as they are retained by the Service Provider for monitoring.

The final signed copy of the payment is to be uploaded into the payment via the Document Upload function.

If any questions, please contact the FRWDB Program Manager.

### **Attachments:**

TRN-OJT-002, CalJOBS Training and Reference Guide for On the Job Training

TRN-STA-002, CalJOBS Training and Reference Guide for Skills Training Accounts

TRN-SUP-002, CalJOBS Training and Reference Guide for Supportive Services

TRN-TJS-001, CalJOBS Training and Reference Guide for Transitional Jobs

TRN-WEX-002, CalJOBS Training and Reference Guide for Work Experience (Youth Work Based Learning)