

Fresno Regional Workforce Development Board

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OPERATIONAL DIRECTIVE

FRWDB OD # 25-18, Revision E

Date Released: March 15, 2019

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: March 15, 2019

Subject: CalJOBS Skills Training Process

Applicable Program: Adult, Dislocated Worker, Older Youth

Revision History: Initial Release – 8/14/18; Rev B – 8/31/18; Rev C – 10/25/18; Rev D – 2/14/19

This revision E communicates: a) removal of references to minimum required academic reading and math scores, b) further clarifies the School Research process, and c) clarifies required signatures on training voucher in TRN-STA-002.

Note that the process is the same for all training programs and training providers (private and public), except where noted.

This Operational Directive (OD) references the following processes:

Control #	Title
PB 01-06	Definition of Regular and Full Time Employment
PB 02-10	Customer Management
PB 04-10	Individual Training Account – Maximum Amount and Duration
OD 27-09	Waiver Request Process
OD 26-18	CalJOBS Data Entry Requirements and Data Changes
OD 03-16	Youth Service Codes
OD 04-16	Adult Service Codes
OD 18-18	CalJOBS Supportive Services Process
OD 24-18	Fundable Activities
IB 11-12	Communications with Providers of Training Services

All providers of services are to implement this OD and its supporting forms immediately.

The Skills Training Process is depicted on pages 7 and 8.

Due to the limited funding available for training and the high degree of need for vocational training in Fresno County, it is the Fresno Regional Workforce Development Board's (FRWDB) policy to provide only one (1) training scholarship to eligible participants. This is a lifetime limit. Under extreme circumstances, such as an industry or occupational collapse (this would apply to dislocated workers) or in the event the training is a skills upgrade in order to maintain current employment, this policy may be

waived. In these circumstances, a waiver request must be submitted to the FRWDB, prior to any commitment of training funds.

The training must be in an occupation that results in regular and full-time employment as defined by the FRWDB (see Policy Bulletin (PB) 01-06).

All participants must seek employment in the field for which they have been trained.

Training Opportunities

There are two categories of training:

1. ITA Training – This training must be approved by the state and as a result appears on the state Eligible Training Provider List (ETPL) in CalJOBS.
2. Pre-requisite and Remediation Training – This training may or may not have costs. These programs are reviewed, approved and placed on the state ETPL. In some cases pre-requisite training classes may be incorporated into the primary vocational training program.

Participants may enroll in only those training programs that are approved and have been listed on the Fresno local ETPL which can be found at:

<https://www.it-frs.net/v2/pub/jobseeker/coursesearch.aspx>.

In the event that a participant is interested in a training program that is on the State ETPL (CalJOBS) and not on the Fresno Local list, contact the FRWDB ETPL Coordinator for further guidance.

Programs that have been placed on HOLD are not eligible for referral. NOTE: Any training program on Hold will NOT be displayed on the Workforce Connection website.

All WIOA participants must be able to demonstrate competency in the skills associated with their program by passing each course and/or program with a minimum grade of 70 percent.

All reasonable accommodations required by law must be made available to all populations, and all participants must be provided with sufficient information regarding non-traditional training activities.

Eligibility Requirements For Training

Participants are eligible to receive an ITA, when they:

1. Have been determined to be in need of training services.
2. Can demonstrate they do not have the financial ability to pay for the training.
3. Have the skills and qualifications that would lead to successful participation and completion in the selected training program. WorkKeys assessments results must align with the training occupation.
4. For all training: submit a complete and accurate Scholarship Package (2 copies) to FRWDB staff and successfully interview with the FRWDB Scholarship Panel.
 - a. Remediation training does not require a scholarship package or panel interview.
 - b. If needed, any Pre-requisite training programs required to complete the primary training program, must be included in the scholarship package.

Maximum Amount Of An Individual Training Agreement Contract

The maximum dollar amount for skills training is set by the FRWDB. The current allowable training amounts can be found in PB 04-10.

All training must be necessary to obtain or retain employment and provide new and/or upgraded skills not already acquired. Any balance remaining in a skills training program where the participant has successfully completed 80 percent of the hours and 100 percent of the skills competencies, will be paid to the training provider. The participant must receive a Certificate of Completion in order for the provider to be paid in full. A copy of the certificate must be in the participant's case file.

In the event training is terminated prior to successful completion as defined above, the remaining balance will be credited back to the grant from which it originated. The Training Provider will only be paid for those hours the participant completed (per timesheets) and non-tuition expenditures actually incurred prior to termination. In the event of this occurrence, notify the FRWDB Quality Systems Manager to determine if a funding recapture process with the school is required.

Training Duration

It is recognized that the duration of training will vary according to the skill level of the participant, the particular training component, and/or the employment opportunity being pursued. The maximum duration of a skills training program shall not exceed 12 months from the first date of class enrollment, per PB 04-10.

School Research Process

All participants who are eligible to receive training are required to research a minimum of 3 training providers, if available, utilizing school websites and CalJOBS₇ prior to selecting a training program.

When the participant has made a decision on occupation and training programs available, the ERS/ACA and the participant is to arrange a date and time to visit each school. At a minimum, the participant is to visit the school they wish to attend. The ERS/ACA is required to email the point of contact for each school that is being considered to inform them of the participant's interest. Schools usually have enrollment requirements that a participant must meet before being eligible for enrollment. ERS/ACA must document in case notes which schools were visited.

In the event a participant has been referred to Workforce Connection by a public education entity (mandated partner of the FRWDB) for a training program, the school research and visit process is waived.

Training must be for an occupation on the Demand Occupation List. If it is not, a waiver request with LMI research attached demonstrating employment opportunities in that occupation must be submitted and approved prior to proceeding.

Scholarship Panel Process

All participants eligible to receive training are required to complete a scholarship application, scholarship package and successfully complete a panel interview except under those conditions specified elsewhere in this OD.

The Scholarship Package is to include a copy of the participant's "Job Interview Ready" resume. The resume must not include any reference to training prior to being awarded. The quality of the resume could affect the outcome of the Panel's decision to award a training scholarship.

The participant should come prepared for this interview as if they were interviewing for a job.

Documenting California Community College Promise Grants (CCC Promise Grant) (formerly known as BOG Fee Waiver)

In the event a participant is qualified for a CCC Promise Grant in support of an ITA activity, the amount of that financial assistance must be entered into CalJOBS.

Evidence of the award of CCC Promise Grant, other discounts or non-WIOA grants must be included in the Scholarship Package.

Documenting Pell Grant Awards and/or other types of Financial Aid

PELL Grants will be allocated to the participant to offset financial hardship as a result of participating in training. PELL Grant award amounts will be documented in CalJOBS in the Financial Aid tab, but will be applied towards the participant, not the service cost.

Participants who receive PELL Grants will not be eligible to receive WIOA funded supportive services until the PELL Grant funds have been exhausted. Once the participant has been awarded the scholarship, the participant must read and sign form # STA-216, PELL Grant Funds Participant Acknowledgment.

A copy of the PELL Grant award must be included in the Scholarship Package and emailed to the FRWDB Fiscal Unit at trng-docs@wfc.co.

The disbursement of PELL Grant funds to participants is not controlled by FRWDB. Each school has its own policy and process to follow in order to remain compliant with their Federal obligations. If there is an issue with timely PELL Grant disbursements, notify the FRWDB ETPL Coordinator and direct the participant to the school's Financial Aid officer or the director of the campus.

Veterans, who have access to training funds through the GI Bill, are not required to use these funds before the use of WIOA funds.

Public Education Entities Requirements

In the event a participant chooses to go to a Community College, Adult School or other public education entity, the following process is to be followed to confirm/verify enrollment and attendance:

Public Education Entity Bi-Weekly Time Sheet, Form STA-218

1. This timesheet is used to collect the hours the student was participating in class during a two-week period. This timesheet will be used to calculate any supportive services that are required as a result of the student's participation in class.
2. This time sheet is to be filled out by the student and the ERS/ACA.
3. The student is to fill in the number of hours they were in class, for the days they attended class.
4. The student is required to sign the self-certification. By signing the form, the student is stating that all information on the timesheet is true and accurate. If it is determined that the information is not true or accurate, the student could be held liable for any funds expended during the time period.
5. After the student has completed the time sheet, the ERS/ACA is required to fill in any supportive service amounts, as needed, and sign the certification statement.
6. The ERS/ACA will then process supportive services in CalJOBS as needed and upload the timesheet and other documentation in the participant's case file in CalJOBS.

Public Education Entity Monthly Enrollment Verification, Form STA-217

1. ERS/ACA to fill out Student Name, State ID#, Student School ID#, Month, and Course Name(s)
2. Student to fill out Name of the Instructor(s)
3. Student to request Instructor(s) to provide the # of classes missed, current progress status of student, and initial the line.
4. Student to initial each line.
5. Student to turn in completed form to ERS/ACA within 5 working days from the end of the previous month.

6. ERS/ACA to file the Enrollment Verification in the student's case file.

In the case where a student drops out of the training program, after the "drop period" (usually two weeks after the beginning of the training), the full tuition amount is still due to the school. Once the drop period has passed, the school is to invoice for the full tuition/fee amount for the semester or quarter only.

ITA Agreement

Once the Scholarship Panel has approved a participant to attend a training program, the ERS/ACA is to complete the ITA Agreement (form# STA-020), verify training costs and secure signatures of the participant and the ERS/ACA. The Agreement requires a school representative's signature. Once all signatures are secured, email a copy to trng-docs@wfc.co and upload the signed document to the case notes section for the training activity that has been created.

Skills Training Costs and Payments (See OD 24-18, Fundable Activities for further guidance)

The cost of an ITA includes all expenses directly related to the training program, as long as all of those expenses are charged to all students enrolled in the class. Some of these costs may be payable to third party vendors. In some cases, the costs will include pre and/or post training expenses such as background checks, state licensure prep activities and state testing.

Any other financial needs of the participant may be handled with Supportive Services, following the process in OD 18-18.

Vouchers and Payments

The provider of services will create vouchers per TRN-STA-002. Separate vouchers will be created for: 1) payments to the service provider for non-tuition expenses, and 2) tuition, fees and expenses owed directly to the school (payments to be made to a school bookstore are considered non-tuition expenses initially paid by the service provider).

The vouchers are used to obligate funds for the training. It is the Service Provider's responsibility to ensure that all cost allocations between the school (tuition and expenses paid to school) and provider of services (non-tuition expenses not paid directly to the school) are accurate. See TRN-STA-002, Section 4.

When the service actually begins and attendance is confirmed, create the activity and the voucher(s) using the Actual Begin Date. Refer to TRN-STA-002 for steps to create an activity and the voucher.

Payments to Schools

The Training Provider will submit an invoice to itainvoice@wfc.co. The Service Provider management will identify their participants and will review timesheets and school expenses against the invoice and will create a payment record against the appropriate voucher in CalJOBS. The Service Provider is to scan and email the payment record and approved time sheets to trng-docs@wfc.co, and copy the point of contact at the Training Provider. FRWDB will make payments directly to the Training Provider, provided there are no issues with the documents, within seven (7) to ten (10) business days. The FRWDB Fiscal Unit will document the payment in the payment record in CalJOBS.

Under no circumstance will a provider create a payment record and submit it to the FRWDB Fiscal Unit without an invoice from the school.

Tuition/Fees

Private training institutions are paid based on three (3) pay points (50% after completion of 1st timesheet, 25% at mid-point, 25% at completion and award of

Certificate of Completion). The school will submit invoices at each of these pay points.

Public training institutions (community colleges, adult schools, etc.), tuition and fees will be categorized as Other Expenses and paid as invoiced by the school.

For public training institutions payment purposes, all costs are categorized as expenses, split between books, tools and other.

Student Drops In the event a participant drops from the training program, the ERS/ACA is required to notify the FRWDB ETPL Coordinator in order to determine if there is pre-paid tuition funding that needs to be returned to the FRWDB.

Non-Tuition Expense Payments are paid as invoiced, following the process described above.

Service Provider Payments

Non-Tuition Expense Payments. When the service provider is ready to be reimbursed for non-tuition training expenses, provider staff must create a payment record against the appropriate voucher in CalJOBS. These costs will show in the respective (school or service provider) ITA voucher. In both cases, the provider of services will authorize payments to the School or Provider of Services. The reimbursement package must include a printout of the payment record from CalJOBS, receipts, proof of payment to the vendors (such as Sears, Target, Amazon, school bookstore, etc.). The reimbursement package is to be emailed to trng-docs@wfc.co. Upon receipt of a complete, accurate reimbursement package, the FRWDB will make payments directly to the School or Service Provider, within seven (7) to ten (10) business days.

ITA Voucher Changes after Initial Approval

A request for change to an ITA voucher to change costs or change cost allocation after the voucher creation, must be submitted to the FRWDB, following the Data Change Request process (See OD 15-12). FRWDB Data Services staff will then coordinate the change between CalJOBS, the FRWDB Fiscal Unit and the Provider of Services.

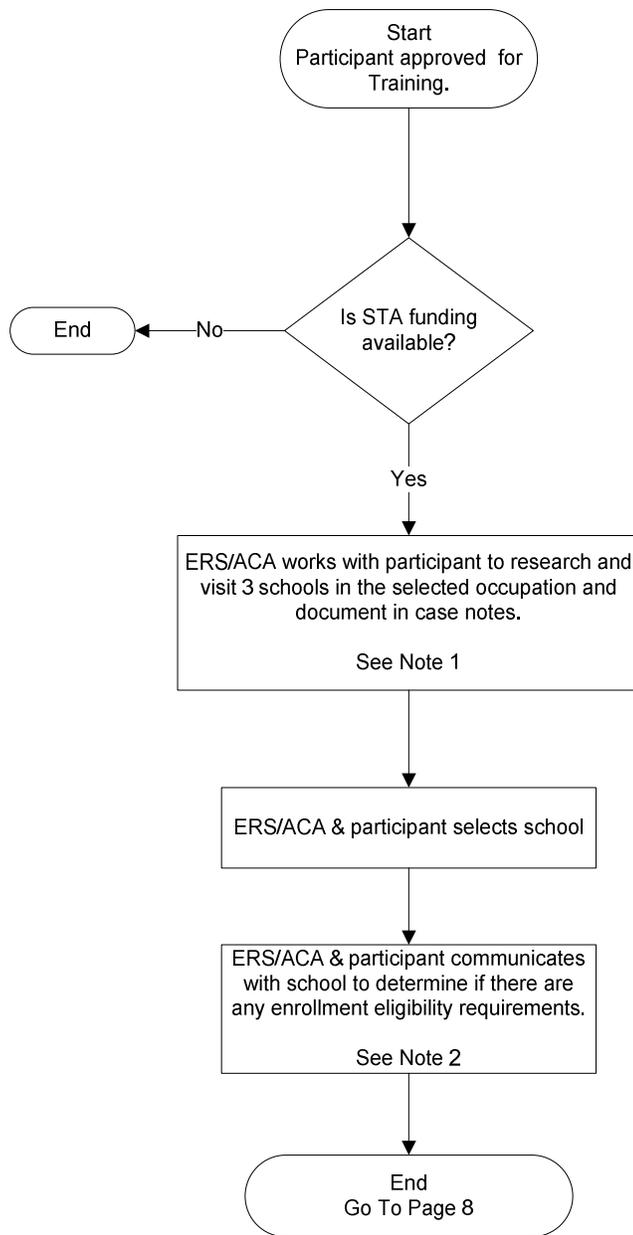
If any questions, please contact the FRWDB Program manager, unless otherwise directed in this OD.

Work Instructions:

TRN-STA-002, CalJOBS Training and Reference Guide for STAs

Forms:

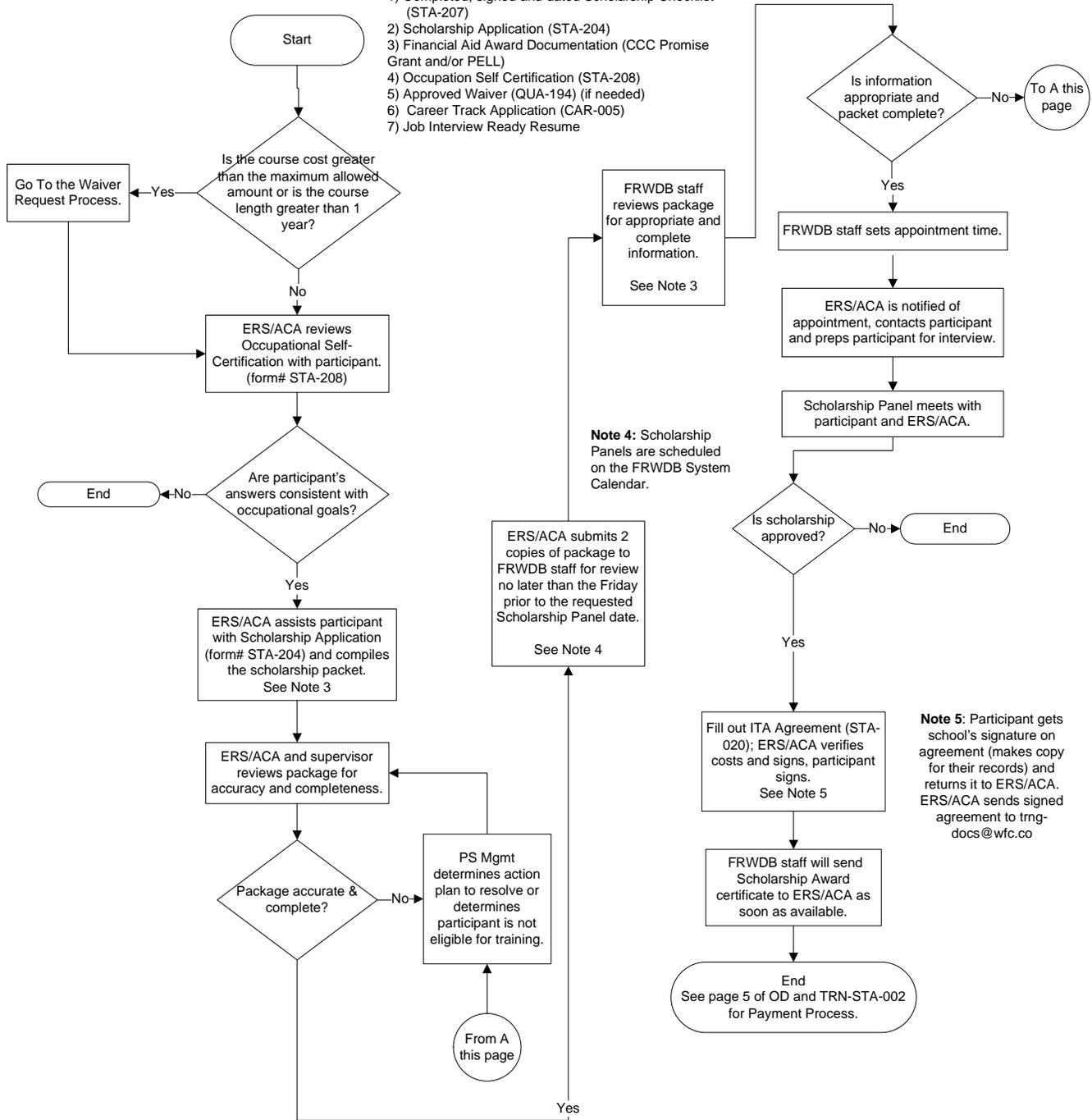
Control #	Description	Control #	Description
CAR-005	Career Track Application	CAR-005sp	Career Track Application (Spanish)
STA-204	Scholarship Application	STA-207	Scholarship Panel Checklist
STA-208	Occupation Self-Certification	GEN-002	Bi-Weekly Timesheet
STA-216	Pell Grant Funds Participant Acknowledgement	STA-220	ITA Agreement
STA-217	Public Education Entity Monthly Enrollment Verification	STA-218	Public Education Entity Bi-Weekly Time Sheet



Note 1: The participant should not sign any school documentation which could cause financial liability.

Note 2: If student does not meet the school's eligibility requirements, the participant must resolve the issues or select another training provider

Note 3: Use Form# STA-207 to compile in sequence:
 1) Completed, signed and dated Scholarship Checklist (STA-207)
 2) Scholarship Application (STA-204)
 3) Financial Aid Award Documentation (CCC Promise Grant and/or PELL)
 4) Occupation Self Certification (STA-208)
 5) Approved Waiver (QUA-194) (if needed)
 6) Career Track Application (CAR-005)
 7) Job Interview Ready Resume



Note 4: Scholarship Panels are scheduled on the FRWDB System Calendar.

Note 5: Participant gets school's signature on agreement (makes copy for their records) and returns it to ERS/ACA. ERS/ACA sends signed agreement to trng-docs@wfc.co