

Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

OPERATIONAL DIRECTIVE

FRWDB OD # 18-18 Revision H1

Date Released: March 13, 2020

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: March 13, 2020

Subject: Supportive Services Process

Applicable Program: All

Revision History: Initial Release – 6/6/18; Rev B – 7/5/18; Rev C – 8/14/18; Rev D – 5/16/19; Rev E – 12/5/19; Rev F – 12/20/20; Rev G – 2/25/20

This Revision H updates overall guidance by simplifying the Expenditure Process, increases payment process timing to 30 calendar days, and removes uploading proof of payment to CalJOBS and updates TRN-SUP-002.

This OD references the current Supportive Services Payment Schedule OD.

Supportive Services Expenditures Process:

- Follow the current Supportive Services Payment Schedule OD.
- To process the payment (see TRN-SUP-002):
 - When the completed timesheet is received or supportive service is provided to the participant:
 - Service code is opened.
 - Voucher/payment information is input.
 - Service code is closed the same day it is opened.
- It is recognized that the voucher approvals will occur after the service code is closed. CalJOBS will allow staff to manage voucher and payment after the activity is closed. However, the voucher payment must be approved and submitted to FRWDB Fiscal Unit no later than 30 calendar days after the service code is opened/closed.

As always, provider of service staff is required to ensure all appropriate supporting documentation is maintained in the participant file.

- Original, signed Supportive Services Self-Certification, Form# SUP-002.
- All supporting documentation and receipts.

Process Notes/Requirements

- 1) ERS/ACA must verify if the participant was previously enrolled in WIOA and if so, has the life time cap been exceeded.

- 2) ERS/ACA must verify that the participant is not receiving supportive services from another agency.
- 3) ERS/ACA must verify that the participant is not covered by an employer's benefit plan, either through their own employer or a family member's employer.
- 4) ERS/ACA must verify WIOA Supportive Services funds are available.
- 5) ERS/ACA must verify participant's need.

FISCAL PROCESS

Once the Supportive Service voucher (from CalJOBS) is signed by service provider management, it is to be uploaded into the voucher on CalJOBS via the Document Upload function.

Providers are required to submit the signed approved CalJOBS Supportive Service Payment voucher via email to sus-docs@wfc.co.

CalJOBS Documentation Process

The signed copy of the approved payment voucher and all supporting documentation (see below) is to be uploaded into the Payment Record via the Document Upload function.

Supporting Documentation to be uploaded:

- Signed CalJOBS Voucher Payment Request

See TRN-SUP-002 for supportive services data entry in CalJOBS.

If there are any questions, contact the FRWDB Program Manager.

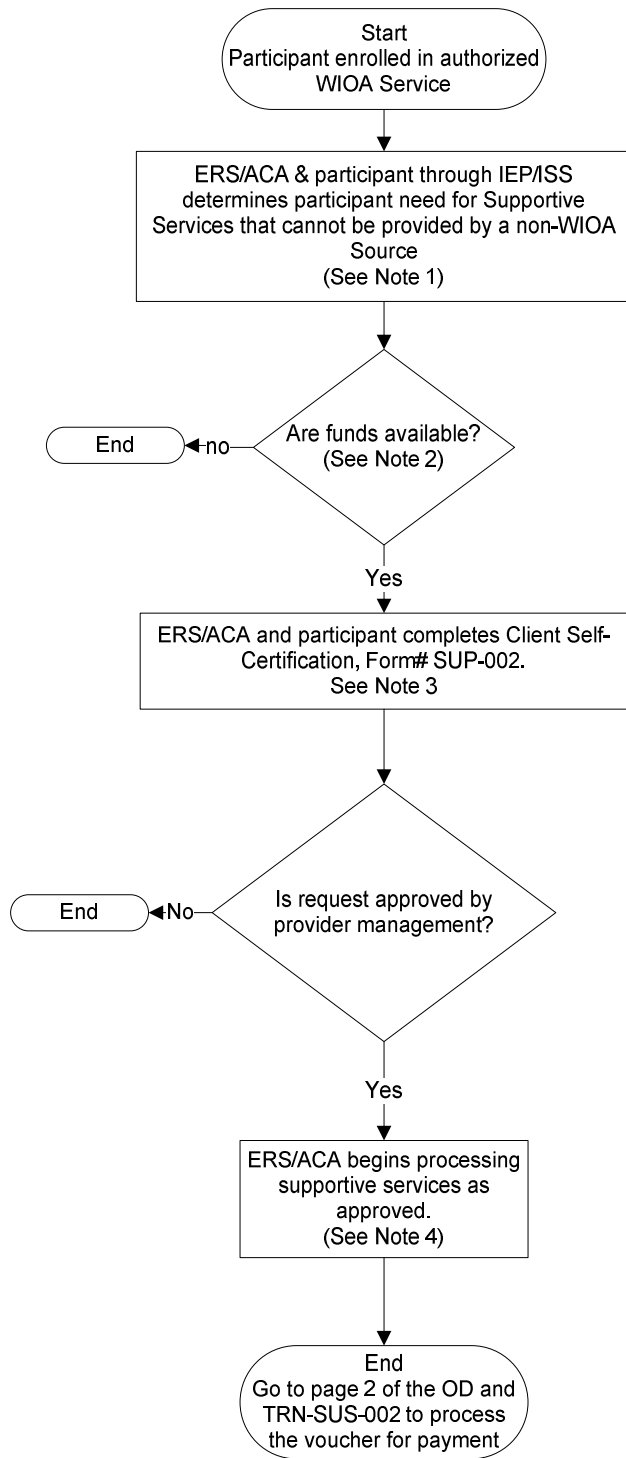
Forms:

<u>Document Number</u>	<u>Title</u>
SUP-001	Supportive Services Manual
SUP-002	Supportive Services Self-Certification
SUP-006	Needs Related Payment Request
SUP-008	Participant Pre-Employment Interview/Relocation Request
SUP-009	Pre-Employment/Relocation Expense Report
GEN-001	Applicant's Statement
GEN-002	Bi-weekly Time Sheet

Work Instructions

TRN-SUP-002	CalJOBS Reference Guide for Supportive Services
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Request and Approval Process Flow:



Note 1:

- a) ERS/ACA must verify if the participant was previously enrolled in WIOA and if so, has the life time cap been exceeded. See Supportive Services Manual for criteria.
- b) ERS/ACA must verify that the participant is not receiving supportive services from another agency.
- c) ERS/ACA must verify that the participant is not covered by an employer's benefit plan, either through their own employer or a family member's employer.

Note 2: Verify and approve use of funds via internal provider process

Note 3: If request is for or includes Needs Related Payment (NRP), Form SUP-006, NRP Request Approval must be completed at this time. If request is for NRP only, then fill out form SUP-006 only.

Note 4

Supportive Services to be kept in the participant's case file:

- 1) Original, signed Supportive Services Self-Certification, Form SUP-002.
- 2) All supporting documentation and receipts.

Supportive Services documentation to be uploaded to the voucher in CalJOBS :

- 1) Final signed copy of the approved voucher