

Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

Information Bulletin

FRWDB IB # 03-20

Date Released: October 2, 2020

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: October 5, 2020

Subject: Paperless Digital Eligibility Pilot

Applicable Program: Adult & Dislocated Workers

Revision History: Initial Release

The Fresno Regional Workforce Development Board (FRWDB) is currently in the process of transitioning to a paperless digital case file system.

Transitioning to digital case files:

- Eliminates the need for storage areas and storage costs associated with paper files
- Saves supply costs and decreases paper waste
- Provides for an easily accessible, single-point of access for file review
- Reduces staff time managing and accessing hard copy documentation
- Ensures more secure storage of sensitive information
- Eliminates lost or misfiled paper documents
- Increases the consistency of file documentation,
- Ensures complete verification for program eligibility, and
- Eases the burden of paper usage for monitoring participant activity both internally and externally.

The first phase in the transition to digital files will be the development of a fully digital Eligibility process that will expedite participant eligibility determination and WIOA enrollments. To begin the first phase of the process, FRWDB staff is implementing an eligibility pilot to evaluate the process prior to full implementation.

The following guidance provides instructions for the pilot process to be implemented by Provider staff at all Workforce Connection (WFC) locations.

Eligibility Process:

Beginning **October 5, 2020**, providers will use the following digital eligibility process for the completion of eligibility for the first 20 applicants scheduled for WIOA eligibility as follows: 10 urban and 5 rural East and 5 rural West. The pilot will end when the minimum number of 20 applicants has completed the eligibility process.

All Provider staff will complete the WIOA applications in CalJOBS, all documents/forms must have authorized original/electronic signatures and/or original/electronic initials with dates, where applicable. Eligibility staff will use electronic signature pads to obtain electronic signatures on the application and all required documents.

In the event a customer is unable to be scheduled for an in-person appointment, staff may use the following electronic or in person delivery process to send and receive required eligibility documents, i.e., Right-to-Work documents:

- **Electronic:**
 - Providers may use CalJOBS to send and receive eligibility verification documentation i.e., Right to Work documents.
 - Documents that do **not** include Personally Identifiable Information (PII), i.e. Application packets, may be sent and received via email, text messaging or other electronic options.
 - **UNDER NO CIRCUMSTANCE** can any documents or forms with PII be submitted via email, text messaging or any other electronic form via the internet.
 - i. CalJOBS is the only electronic methodology allowed for this type of information.
- **In Person Delivery:** Any individual that does not have the ability to utilize the electronic process must be provided the option to pick up and drop off all eligibility forms and documentation at the WFC location.

The only copy of the application that will be printed is to provide the participant with a copy of the application.

All documents and forms are to be uploaded to CalJOBS in the Documents (Staff) section and labeled accordingly under the “Document Tags” field (Keywords that will be indexed with this attachment) in CalJOBS.

Adult/Dislocated Digital Case File Naming Convention/Upload Process:

The digital case file standard includes the naming convention of all documents uploaded to CalJOBS. Provider staff must use the digital case file naming convention for eligibility documents as follows:

- Utilizing the CalJOBS Case Management System in the Documents (Staff) section
- Upload/Scan a document
- Input Document Tag name as identified in **bold and underlined** text below:

1. WIOA Eligibility Packet

Scanned packet order must be in the following sequence (Includes all documents below):

- Right to Work Documents:
 - Passport, CA ID or License, Birth Certificate, signed Social Security Card, Permanent Residency Card, etc.
- Selective Service Registration verification (if applicable)
- Fresno County Residency Verification
- Verification of Family Size (as applicable)
- Income Summary Sheet (as applicable)
- Income Verification
 - Verification of public assistance/CalFRESH
 - Check stubs prior 6 months for working individuals
 - Other verification of income (if applicable)

- Verification of Dislocated Worker Eligibility
- Applicant's Statement (if applicable)
- Media Release Form
- Universal Release of Information
- FRWDB Nepotism Policy
- WIOA Title I Programs Compliant Procedure /Discrimination Complaint Procedures
- WIOA UI-Data Consent Authorization Form

2. Waiver/ (Insert Document Tag Name Below)

- Name of Process being waived

Provider eligibility staff notifies their management (eligibility reviewer) that the Eligibility WIOA Application packet has been completed.

Eligibility Reviewer Staff (management) will review applicant's WIOA application packet in CalJOBS and must case note in CalJOBS that the WIOA application packet was reviewed and approved or disapproved for WIOA enrollment.

If you have any questions, please contact the FRWDB Adult Program Manager.