

Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

OPERATIONAL DIRECTIVE

FRWDB OD # 18-20

Date Released: December 14, 2020

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: December 14, 2020

Subject: Digital Eligibility Process

Applicable Program: Adult and Dislocated Worker

Revision History: Initial Release

The purpose of this directive is to establish guidance and instructions on the Digital Eligibility Process to be implemented by Provider staff at all Workforce Connection (WFC) locations.

This Operational Directive (OD) references OD 03-15 Fresno County Title I Eligibility Technical Assistance Guide (TAG).

The digital case files will:

- Eliminate the need for storage areas and storage costs associated with paper files
- Save supply costs and decreases paper waste
- Provide for an easily accessible, single-point of access for file review
- Reduce staff time managing and accessing hard copy documentation
- Ensure more secure storage of sensitive information
- Eliminate lost or misfiled paper documents
- Increase the consistency of file documentation,
- Ensure the completion of verification for program eligibility, and
- Ease the burden of paper usage for monitoring participant activity both internally and externally.

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. Authorized staff may reset the signature should the participant's signature be inappropriate at the discretion of the Reviewer. This will allow the participant to electronically re-sign the application. The participant's signature shall not be reset after the Reviewer approves the application.

In the event an applicant is unable to be scheduled for an in-person appointment, Eligibility 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 WIOA Pre-Application in CalJOBS.
 - Eligibility staff will meet with applicants prior to completing the pre-application to clearly inform the applicant what information is needed to upload.
 - 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.
 - CalJOBS is the only electronic methodology allowed for this type of information.

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

CALJOBS Application Errors:

In the event the applicant is unable to sign application remotely, the Eligibility Staff will schedule the applicant to come into the office to sign the WIOA Application. Once original signatures are obtained, the Eligibility staff will:

- Scan the CALJOBS WIOA Application and will include as the first document in the WIOA Eligibility Packet,
- Give original WIOA Application to the applicant, and
- Case note the Error.

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:

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

Waiver/ (Insert Document Tag Name Below)

- Name of Process being waived (if applicable)

Assessments/ (Insert Document Tag Name Below)

- CASAS Goals Pre-Assessment Results (if applicable)

Eligibility Reviewing Process

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 and the WIOA Eligibility packet in CalJOBS.

The Eligibility Reviewer Staff must case note in CalJOBS that the WIOA application and WIOA Eligibility packet was reviewed and approved or disapproved for WIOA enrollment in place of the reviewer signature on the paper application.

In the event the Eligibility Reviewer Staff (management) finds an error in the upload documents or additional documents are needed to complete WIOA application, the Eligibility Reviewer Staff is authorized to delete documents in CALJOBS and upload the correct documents. Eligibility Reviewer Staff (management) must case note the error and the justification of the deletion of the document.

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