

Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

OPERATIONAL DIRECTIVE

FRWDB OD # 02-20, Revision B

Date Released: May 19, 2021

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: May 19, 2021

Subject: WIOA Individual Participation Agreement

Applicable Program: Adult, Dislocated Worker

Revision History: Initial Release – 3/10/20

This Revision B adds the Digital Case File process.

This Operational Directive (OD) references OD 03-20, Workforce Connection Career Services Orientation, OD 38-08, Self-Reliance Team Process, OD 27-06, AJCC One-Stop Resource Room Guidelines, and OD 24-06, Resource Room Dress Code.

One Stop staff is to introduce the Individual Participation Agreement at the Workforce Connection Career Services Orientation and Self Reliance Team interview.

At the time of enrollment into Individualized Career Services, staff is to review the form with the participant and secure their signature. The signed form is to be maintained in the case file.

At the first meeting with the assigned Employment Readiness Specialist (ERS), the form is to be reviewed with the participant.

At any time during program participation, if the participant fails to comply with the agreement, the participant is to be exited from the WIOA program.

Digital Case File Naming Convention/Upload Process

All documents/forms must be uploaded to CalJOBS in the Document (staff) section and labeled accordingly under the "Document Tags" field (Keywords that will be indexed with the attachment) in CalJOBS.

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

- Utilizing the CalJOBS Case Management System in the Document (staff) section
- Upload/Scan a document
- Input Document Tag name below that is in **bolded underline text:**

Plan/ (Insert Document Tag Name Below):

- WIOA Individual Participation Agreement

Please address any questions to the FRWDB Adult Program Manager.

Form: REG-116e, Individual Participation Agreement