

Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

OPERATIONAL DIRECTIVE

FRWDB OD # 29-18, Revision B

Date Released: June 29, 2021

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: June 29, 2021

Subject: Participant Contact

Applicable Program: All

Revision History: Initial Release – 9/13/18

This Revision B updates general terminology and adds the digital case file process.

This OD references OD 10-21, Closure, Exit and Follow-up Process.

Providers of Services staff must have documented contact with participants no less than once every 30 days.

Contact is defined as a dialogue (2-way conversation) with the participant, using the methods below:

- Verbal – in-person, telephonic, or video conference
- Written – email, US Mail, or text message.

Each contact (or attempted contact) must be documented in the case notes in CalJOBS within 3 business days of the event.

Lost Contact/Can Not Locate

If contact has been lost, every effort is to be made to re-establish contact with the participant and resume participation in the program. In the event staff is unable to make at least one contact with a participant for more than 30-days, staff must continue to attempt to contact the participant each month for a minimum of 60-days.

To document each of the attempts to contact the participant during this 60-day period staff must open CalJOBS Service Code 106 - In Program Follow-up for Adult/Dislocated Worker participants and Code 435 - Career Counseling/Planning for Young Adults and document in the case notes.

If contact is re-established within 60 days from last date of documented contact, provider staff must document the reason for the participant's failure to maintain contact. If the participant is not able to provide a valid reason for not staying in touch with the provider staff, the enrollment for the participant should be

closed and staff must enter a closure form in CalJOBS following the process outlined in OD 10-21, Closure, Exit, and Follow-up process.

If the Provider deems that the reason for lack of contact is valid, the provider may continue to provide services and must open an appropriate service code prior to 90 days of the last activity documented in CalJOBS.

If contact has not been re-established within 60 days from last date of documented contact, the appropriate Notice of Intent to Exit letter must be completed (form # ADW-001 or YTH-008) and mailed to the participant's last known mailing address by certified mail with a return receipt requested. A copy of the letter, the certified mail receipt, and the return mail receipt if applicable, must be uploaded to the digital case file in CalJOBS and documented in case notes. Staff must open the last 106/435 dated the same day of the Intent to Exit letter.

If a participant is co-enrolled with a partner or other WIOA program, the appropriate staff of that partner shall be notified that the mutual participant is not complying with WIOA requirements.

If the participant fails to respond within fourteen (14) calendar days from the date of the letter, **they must be closed out of the program**. Staff must enter a closure form in CalJOBS within 15 days from the date the last 106/435 code was entered into CalJOBS.

If the letter is returned by the Postal Service, the returned letter and envelope must be uploaded into the digital case file.

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:**

Participant Contact/ (Insert Document Tag Name Below):

- Notice of Intent to Exit Letter
- Certified mail receipt
- Returned mail

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

Forms:

- ADW-001, Adult Notice of Intent to Exit Letter template
- YTH-008, Youth Notice of Intent to Exit Letter template