

# Fresno Regional Workforce Development Board

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2125 Kern Street, Suite 208 • Fresno, California 93721 • 559.490.7100 • Fax 559.490.7199 • www.frwdb.net

Blake Konczal, Executive Director

## OPERATIONAL DIRECTIVE

FRWDB OD # 31-05, Revision E

Date Released: June 10, 2021

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: June 10, 2021

Subject: Universal Release of Information Process

Applicable Program: All

Revision History: Initial Release - 11/10/05; Rev B – 8/29/08; Rev C – 2/16/12; Rev. D- 8/8/14

Revision E updates adds the Digital Case File process.

The Universal Release of Information Form (Form# [REG-100](#)) is to be used as follows:

- **Adult/Dislocated Worker Program:**

- The Universal Release of Information Form (UROI) is to be filled out and signed by authorized AJCC staff at the time of the Self-Reliance Team (SRT) appointment. For applicants referred to non-WIOA services, the UROI is to be uploaded to CalJOBS in the Document (staff) section and labeled accordingly under the "Document Tags" field in CalJOBS labeled **Non-WIOA UROI**. For applicants referred to WIOA will be uploaded to CalJOBS in the Document (staff) section and labeled **WIOA Eligibility (UROI)**.

- **Youth Program:**

- The Universal Release of Information Form (UROI) is to be filled out and signed by authorized YAS staff at the time of the Eligibility Appointment. The parent or guardian must also sign the form in the presence of provider of services' staff, if the applicant is under the age of 18. For applicants not being referred to WIOA services, the UROI is not required. For applicants referred to WIOA the UROI will be uploaded to CalJOBS in the Document (staff) section and labeled **WIOA Eligibility (UROI)**.

**All other programs under Fresno Regional Workforce Development Board responsibility:** To be filled out at the time of application. Authorized staff sign-off would be by the staff member conducting the application process.

When carrying out the requirements of the Workforce Innovation and Opportunity Act (WIOA) in providing services to all WIOA participants, provider of services' staff shall comply with federal and state statutes and regulations applicable to a participant's right to privacy. WIOA participants have the legal right to informed consent, in writing, prior to the release or the obtaining of any written or verbal information. Additionally, all participant records, including data, must be maintained in a secure environment that safeguards a participant's information.

All WIOA participant information, whether verbal or written, is considered “confidential.” This includes, but is not limited to, (1) information and/or data contained in CalJOBS forms and other case management tools/notes, (2) assessment test(s)/tools and their results, (3) photocopies or originals of any personal documents (e.g., birth certificate, driver’s license, Social Security card, invoices or receipts, and (4) any document(s) obtained from another agency or third party.

Further information related to Confidential Information can be found in Operational Directive 32-02.

If there are any questions, please contact the FRWDB Quality Systems Manager.