

Fresno Regional Workforce Development Board

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OPERATIONAL DIRECTIVE

FRWDB OD # 03-10, Revision D

Date Released: July 1, 2021

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: July 1, 2021

Subject: EDD WIOA CTB TEV PROCESS

Applicable Program: Adult, Dislocated Worker, Older Youth

Revision History: Initial Release – 3/24/10; Rev B – 4/3/20; Rev C – 4/7/20

This Revision D adds the digital case file process.

This OD references EDD Information Notice WSIN 11-5, CTB Program Changes

This OD documents the process to be followed when notifying EDD of a participant's enrollment into an approved WIOA-funded training activity.

This process requires each Provider of Service to identify a management staff member to be responsible for the successful processing and follow-up of each Training Enrollment Verification (TEV). The provider of service is to notify the FRWDB Adult Program Manager or Youth Program Coordinator who this person is.

The designated management staff member will be responsible for:

- verifying that each TEV is complete and accurate,
- the participant has begun training, and
- submitting the completed and signed TEV to EDD via FAX.

Any incomplete or inaccurate forms sent to EDD will not be processed until EDD can resolve issues. This could result in the participant having their benefits stopped temporarily.

Any time after a participant has expressed interest in training, ERS/ACA shall review the TEV form in advance with the participant and inform participant that the form will be completed upon the start of the training:

1. Section A - Review participant information
2. Section A - Verify social security number
3. Section C – Verify date participant applied to this program (initial date expressed interest in training)
4. Section C - WIA (aka WIOA) box will be checked later during the completion of the form

When the scholarship process has begun:

1. ERS/ACA is to review all documents with the participant.
 - a. EDD CTB Fact Sheet (form # DE8714U)
 - b. Tips For Qualifying For CTB (form # DE 23322)
 - c. Rights & Responsibilities (form # DE3442D RR)
 - d. Training Provider Letter (form # DE3100A streamline)

When the participant has started training:

1. The ERS/ACA must verify the participant has started training and complete the TEV as instructed per attached instructions.
2. The designated management staff verifies the TEV is completed accurately and faxes the TEV to the FAX number on page 2 of the TEV instructions.
 - a. **ONLY the designated management staff will have the FAX number. This number is NOT to be used for any other purpose or given to any participant.**
 - b. Upload to CalJOBS in the Document (staff) section, labeled accordingly under the "Document Tags" field, provide original to the participant, and document the completion in the case notes within 3 days of the event.

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:**

EDD (CTB)/ (Insert Document Tag Name Below):

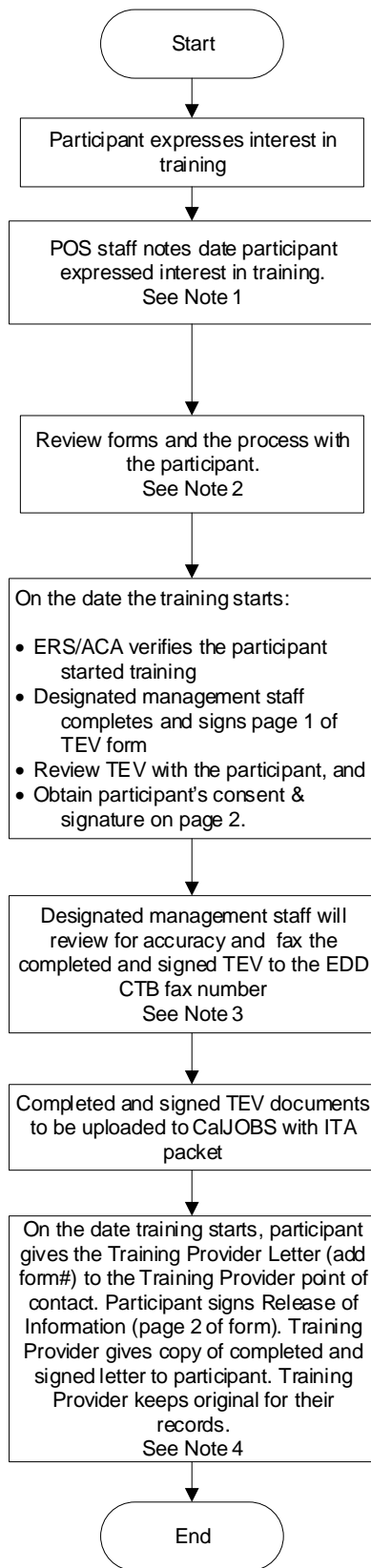
- Signed TEV
- TEV fax confirmation

The Process Flow is depicted on Page 3.

Attachments:

- TEV (form # DE 3422D Rev 4)
- Tips For Qualifying For CTB (form # DE 23322 Rev 3)
- EDD CTB Fact Sheet (form # DE8714U Rev 16)
- Spanish EDD CTB Fact Sheet (form # DE8714U/S Rev 16)
- Rights & Responsibilities (form # DE3442D RR)
- Spanish Rights & Responsibilities (form # DE3442 RR/S)
- Training Provider Letter (form# DE 3100CTB)
- WSIN 11-5, CTB Program Changes

Process Flow



Note 1: This can happen at any point in the process from the point of initial WFC contact, forward.

Note 2: Copy of TEV documents to be given to participant:
 • TEV (form # DE 3422D Rev 4)
 • Tips For Qualifying For CTB (form # DE 23322 Rev 3)
 • EDD CTB Fact Sheet (form # DE8714U Rev 16)
 • Rights & Responsibilities (form # DE3442D RR)
 • Training Provider Letter (form# DE 3100CTB)

Note 3: The FAX number is not to be on any speed dial and not to be distributed to any other staff or participant

Note 4: The Training Provider Letter and ROI is not required to be returned to provider staff.