

Fresno Regional Workforce Development Board

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OPERATIONAL DIRECTIVE

FRWDB OD # 18-18 Revision J

Date Released: October 20, 2021

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: October 20, 2021

Subject: Supportive Services Process

Applicable Program: All

Revision History: Initial Release – 6/6/18; Rev B – 7/5/18; Rev C – 8/14/18; Rev D – 5/16/19; Rev E – 12/5/19; Rev F – 12/20/20; Rev G – 2/25/20; Rev H1- 3/13/20; Rev I – 6/16/21

This Revision J updates general terminology, updates the CalJOBSSM Work Instructions (TRN-SUP-002) to remove the requirement to print, sign, and upload the initial CalJBOSSM Voucher to allocate the supportive services funds into CalJOBSSM, and removes the “lifetime” limit a participant may receive supportive services.

This OD references the current Supportive Services Payment Schedule.

All Providers of Services are to implement this OD and its supporting forms immediately.

Supportive Services Expenditures Process:

- Follow the current Supportive Services Payment Schedule OD.
- To process the payment (see TRN-SUP-002):
 - When the completed timesheet is received or supportive service is provided to the participant:
 - Service code is opened.
 - Voucher/payment information is input.
 - Service code is closed the same day it is opened.
- It is recognized that the voucher approvals will occur after the service code is closed. CalJOBS will allow staff to manage voucher and payment after the activity is closed. However, the voucher payment must be approved and submitted to FRWDB Fiscal Unit no later than seven (7) business days after the service code is opened/closed.

As always, provider of service staff is required to ensure all appropriate supporting documentation is maintained in the participant's digital case file.

- Original, signed Supportive Services Self-Certification, Form# SUP-002.
- All supporting documentation and receipts.

Process Notes/Requirements

- 1) ERS/ACA must verify that the participant is not receiving supportive services from another agency.
- 2) ERS/ACA must verify that the participant is not covered by an employer's benefit plan, either through their own employer or a family member's employer.
- 3) ERS/ACA must verify WIOA Supportive Services funds are available.
- 4) ERS/ACA must verify participant's need.

FISCAL PROCESS

Providers are required to submit the signed approved CalJOBS Supportive Service Payment voucher via email to sus-docs@wfc.co.

CalJOBS Documentation Process

The signed copy of the approved payment voucher and all supporting documentation is to be uploaded into the Payment Record via the Document Upload function, with the file name of Supportive Services (insert type of SUS) Voucher or SUS- (insert type of SUS) Payment Voucher.

Supporting Documentation to be included with the uploaded voucher:

- Signed CalJOBS Voucher Payment Request
- Receipt (s) (insert name/type of SUS provided)
- Supporting Documentation (insert name/type of SUS provided)
- Bi-Weekly Timesheet (insert time period)
- Applicant's Statement
- Participant Self-Certification
- Needs Related Payment Approval
- Pre-Employment Interview/Relocation Request
- Pre-Employment/Relocation Expense Report

See TRN-SUP-002 for supportive services data entry in CalJOBS.

Electronics Signatures

FRWDB encourages the use of electronic signatures in all internal and external activities, documents, and transactions where it is operationally feasible to do so, where existing technology permits, and where it is otherwise appropriate.

The use of electronic signatures is permitted and shall have the same force and effect as the use of a wet signature, utilizing the following methods:

- Signature pad for replacement of physical signatures
- Adobe Sign/DocuSign for replacement of physical signatures
- Individuals that cannot make it into the office, staff verifies the receipt of electronic signature and case notes verifying that the participant has signed the document electronically.

If there are any questions, please contact the appropriate FRWDB Program Coordinator.

See Process Flow on Page 4.

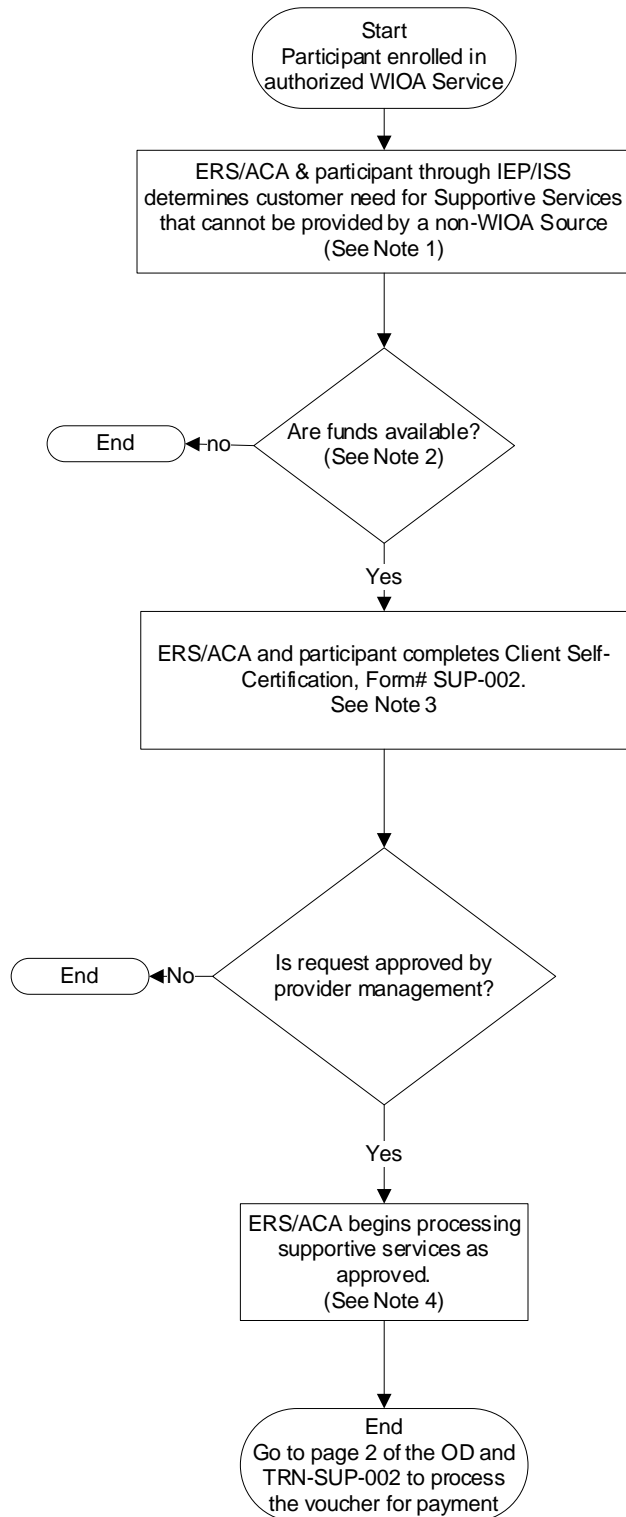
Forms:

<u>Document Number</u>	<u>Title</u>
SUP-001	Supportive Services Manual
SUP-002	Supportive Services Self-Certification
SUP-006	Needs Related Payment Request
SUP-008	Participant Pre-Employment Interview/Relocation Request
SUP-009	Pre-Employment/Relocation Expense Report
GEN-001	Applicant's Statement
GEN-002	Bi-weekly Time Sheet

Work Instructions

TRN-SUP-002	CalJOBS Reference Guide for Supportive Services
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Request and Approval Process Flow:



Note 1:

- a) ERS/ACA must verify that the participant is not receiving supportive services from another agency.
- b) ERS/ACA must verify that the participant is not covered by an employer's benefit plan, either through their own employer or a family member's employer.

Note 2: Verify and approve use of funds via internal provider process

Note 3: If request is for or includes Needs Related Payment (NRP), Form SUP-006, NRP Request Approval must be completed at this time. If request is for NRP only, then fill out form SUP-006 only.

Note 4

Supportive Services to be kept in the participant's digital case file:

- 1) Signed Supportive Services Self-Certification, Form SUP-002.
- 2) All supporting documentation and receipts.

Supportive Services documentation to be uploaded to CalJOBS following the Digital Case File Process

- 1) Signed CalJOBS Voucher payment request.