Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

OPERATIONAL DIRECTIVE

FRWDB OD # 18-18 Revision L   **Date Released: April 20, 2023**

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: April 20, 2023

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; Rev J – 10/20/21; Rev K 1/26/22

This Revision L provides data entry requirements, and updates Forms SUP-001, Supportive Services Manual and SUP-002, Supportive Services Self-certification, and increases the maximum total supportive service limit to $2,000, increase childcare limits, clothing/uniform limits.

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^{sm} will allow staff to manage voucher and payment after the activity is closed. However, all timesheets must be documented and the Payment Voucher entered in CalJOBS^{sm} within four (4) business days from the end of the training timesheet period. 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 of 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^{sm} Supportive Service Payment voucher via email to sus-docs@wfc.co.

CalJOBS^{sm} Documentation Process

The signed copy of the approved payment voucher and all supporting documentation is to be uploaded into the Document (staff) section 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.

Digital Case File Naming Convention/Upload Process

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

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

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

Supportive Services/ (Insert Document Tag Name Below):

- Childcare
- Transportation Assistance
- SUS-Other

Scan Supportive Services packet order must be sequence from top to bottom:

- Payment Voucher
- Participant Self-Certification
- Supportive Services supporting documentation and receipts
- Bi-Weekly Timesheet (insert time period) o Applicant Statement (if applicable)
- Needs Related Payment Approval (if applicable)
- Pre-Employment Interview/Relocating Request (if applicable)
- Pre-Employment/Relocating Expense Report (if applicable)

Waiver/ (Insert Document Tag Name Below):

- Name of Process Waiving

See TRN-SUP-002 for supportive services data entry in CalJOBS^{sm}.

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.

See Process Flow on Page 4.

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

Forms:

Document Number	Title
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^{sm} Reference Guide for Supportive Services

Request and Approval Process Flow:

```
            ┌─────────────────────┐
            │       Start          │
            │ Participant enrolled │
            │      in              │
            │ authorized WIOA      │
            │      Service         │
            └──────────┬──────────┘
                       │
            ┌──────────▼──────────────────┐
            │ ERS/ACA & participant        │
            │ through IEP/ISS              │
            │ determines customer need for │
            │ Supportive Services that     │
            │ cannot be provided by a      │
            │ non-WIOA Source              │
            │ (See Note 1)                 │
            └──────────┬──────────────────┘
                       │
                  ◇ Are funds available?
   End ◄── no ──   (See Note 2)
                       │ Yes
                       │
            ┌──────────▼──────────────────┐
            │ ERS/ACA and participant      │
            │ completes Client Self-       │
            │ Certification, Form# SUP-002.│
            │ See Note 3                   │
            └──────────┬──────────────────┘
                       │
                  ◇ Is request approved by
   End ◄── No ──   provider management?
                       │ Yes
            ┌──────────▼──────────────────┐
            │ ERS/ACA begins processing    │
            │ supportive services as       │
            │ approved.                    │
            │ (See Note 4)                 │
            └──────────┬──────────────────┘
                       │
            ┌──────────▼──────────────────┐
            │          End                 │
            │ Go to page 2 of the OD and   │
            │ TRN-SUP-002 to process       │
            │ the voucher for payment      │
            └──────────────────────────────┘
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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^{sm} following the Digital Case File Process
 1) Signed CalJOBS^{sm} Voucher payment request.