

**WORKFORCE DEVELOPMENT DEPARTMENT**

**Desk Manual**

**Workforce Development Specialist**

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# Section 1

## Workforce Innovation and Opportunity Act (WIOA) Services

### Overview

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#### Introduction

The Workforce Innovation and Opportunity Act (WIOA) is landmark legislation designed to strengthen and improve our nation's public workforce system and help Americans, including youth and those with significant barriers to employment, into high-quality jobs, careers, and help employers hire and retain skilled workers.

The San Bernardino County America's Job Centers of California (AJCC's) accomplishes this by providing no cost services that lead to gainful employment, skilled workers, job retention, and improved earnings potential to individuals and employers.

This improves the quality of the workforce, reduces welfare dependency, and bolsters the productivity and competitiveness of the residents in San Bernardino County.

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#### WIOA Services

WIOA services for Adults and Dislocated Workers are provided primarily through San Bernardino County America's Job Centers of California (AJCC). Listed below are the key reportable service indicators:

- Basic career services (self-service) are informational services available to any member of the public.
  - Basic career services (staff-assisted) are available to enrolled WIOA customers.
  - Individualized career services are an increased level of staff-assisted, skill building services available to enrolled WIOA customers.
  - Training services include employment-related training programs offered through the AJCC's.
  - Supportive services are available to enrolled WIOA customers to enable them to participate in careers services and training activities.
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#### Priority of Service (POS)

WIOA established a priority requirement with respect to funds allocated to serve adults. Under WIOA, Local Workforce Development Boards (LWDB) must give priority to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient. Applicants not meeting the POS criteria will be WIOA enrolled on a case-by-case basis. Enrolled veterans receive veterans' priority.

**Note:** Dislocated Workers & Youth are not subject to POS.

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## Overview, Continued

### Key Reportable Service Indicators

The Workforce Development Specialist (WDS) actions/standards are goals set to achieve positive results for program services. These results are reported to the Board of Supervisors, to WDD management, as well as quarterly and annually to the state for WIOA performance outcomes. The indicators are:

1. Enrollments
2. Employments
3. Training Enrollments
4. Program service documentation and quantitative measures (CalJOBS)
5. Follow-ups

### Workforce Development Specialist (WDS)

The Workforce Development Specialist (WDS) provides services to customers seeking employment and training assistance through funding provided by WIOA, special grants, and contracts. The duties of the WDS include, but are not limited to:

- Interviewing, screening, and counseling customers regarding employment barriers and challenges
- Advising customers on training and employment opportunities
- Monitoring and documenting customer services in CalJOBS
- Providing vocational counseling
- Developing Individual Employment Plans (IEP)
- Providing job referrals to customers
- Facilitating orientation and job search related workshops
- Engaging in public outreach regarding program services
- Attending meetings and community events on behalf of the Workforce Development Department and San Bernardino County

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# Eligibility Determination

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## Introduction

In order to enroll a customer into the Workforce Innovation and Opportunity Act (WIOA) program to receive services beyond basic career self-service, a customer must meet the eligibility requirements as set forth in the law. This section provides information on eligibility requirements and the documents needed to verify eligibility.

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## Registration and Orientation

WIOA requires Adults, Dislocated Workers, and Youth who wish to receive WIOA services to self-register in CalJOBS. Customers can register at [www.caljobs.ca.gov](http://www.caljobs.ca.gov) or download the mobile application for Android or Apple devices to register.

At the point of self-registration, the customer becomes a reportable individual. A reportable individual is a customer who is not enrolled in WIOA but is still able to access basic self-services.

Customers are invited to watch the Orientation video to introduce AJCC services available to them. WIOA orientation is documented in the WP Registration Only Application. The video is available at: <https://www.youtube.com/watch?v=E02tKtC-KgA&feature=youtu.be>.

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## Eligibility Documentation

A customer's eligibility for WIOA services must be collected and documented for each eligibility criterion. The eligibility source documentation must be reviewed and approved by the Workforce Development Supervisor and filed/scanned in the customer's case folder.

The WDS should refer to:

- I-9 list of right work documents,
  - Dislocated Worker Matrix, and
  - Priority of Service Groups Matrix to guide the eligibility determination.
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# Selective Service

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## Introduction

It is required all males born after December 31, 1959 must be registered for Selective Service in order to be enrolled for Workforce Innovation and Opportunity Act (WIOA) services. This requirement may be waived with management approval.

**Note:** Refer to the WDD Intranet Forms and Manuals section>open the handbook accordion>select the “Guide for additional information”>open Selective Services.

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## Verification

Selective Service status must be verified using either [www.sss.gov](http://www.sss.gov) or through another form of acceptable verification (i.e. Registration card).

When a male is *not registered* for Selective Services, the Workforce Development Specialist (WDS) will use the following table:

If the customer is...	Then the customer needs to ...
Under the age of 26,	Complete registration at <a href="http://www.sss.gov">www.sss.gov</a>
Over the age of 26,	<ul style="list-style-type: none"><li>• The customer must:<ul style="list-style-type: none"><li>– Obtain a Status Information Letter from Selective Service,</li><li>– Write an explanation (Selective Service Failure to Register Self-Atestation Statement form) explaining the reason for not registering, and</li><li>– Provide substantiating documentation (i.e. proof of incarceration, entry into U.S., etc.), if applicable.</li></ul></li><li>• WDS will submit the letter, statement, and proof to the America’s Job Center of California (AJCC) Manager or Supervisor for review.</li></ul>

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## Manager / Supervisor Review

The AJCC Manager or Supervisor reviews the Selective Service documents to determine customer’s WIOA eligibility and enters a detailed case note regarding Selective Service status in CalJOBS. The decision to waive the Selective Service requirement resides with the AJCC Manager or Supervisor.

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# Resource Room Duties

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**Introduction** Each America's Job Center of California (AJCC) provides customers with resources to engage in self-directed employment services in the resource room.

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**VOS Greeter** All customers who wish to receive services through the AJCC's must be check-in through VOS Greeter. In cases where the customer did not check in through VOS Greeter at the front desk, WDSs may enter the check-in in CalJOBS.

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**Resource Room** Resource Room staff members may:

- Enter case notes,
- Schedule customers to attend informational workshops and enter appropriate case notes,
- Answer customer inquiries and/or make referrals to:
  - Workshops,
  - Training,
  - Veterans services, and
  - Other services.
- Post and maintain job openings on bulletin board and reception counter,
- Assist customers with system registration in CalJOBS,
- Provide assistance with job search,
- Generate job referrals through CalJOBS, and
- Advise management when computer equipment/software issues occur to ensure computers are available to customers during office hours.

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# Workshops

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## Introduction

Workshops are available at an America's Job Center of California (AJCC) to assist customers with job search and career exploration activities. A Workforce Development Specialist (WDS) may be assigned to:

- Create materials,
  - Facilitate and evaluate workshops, and
  - Provide data on attendance and outcomes of workshop attendees.
- 

## Topics

The AJCC conducts workshops covering, but not limited to, the following topics:

- Professional Edge,
  - Steps to Economic and Personal Success (STEPS),
  - Journey to Employment,
  - Resume online/virtual workshop, and
  - Therefore, you want to be a Truck Driver.
- 

## Preparation & Presentation

Preparation and presentation are vital to the success of workshops. Staff members are required to:

- Create and/or identify appropriate materials for assigned presentation
- Schedule classrooms
- Provide information to advertise and promote workshops and/or recruitments
- Manage audio/visual equipment and room set-up
- Provide materials for attendees
- Verify attendance

**Note:** Facilitators should promote the full range of services available at the AJCC.

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## CalJOBS Entries

The WDS will review case notes to verify the workshop facilitators noted workshop attendance

In cases where the WDS identifies case notes were not entered, he/she will inform the workshop facilitator to complete the entry.

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# Initial Visit

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## Introduction

The initial visit is critical to identifying a customer's needs, goals, barriers, and should serve as a foundation to a fruitful relationship. Subsequent counseling appointments are scheduled as needed to provide the customer continued support and assist the customer in completing activities and obtaining employment.

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## Initial Appointment

At the initial appointment, the Workforce Development Specialist (WDS) may perform some of the following activities:

- Obtain the necessary documentation to make a determination on the customer's eligibility
- Identify possible employment barriers
- Review case notes and documentation
- Schedule customer for workshops
- Refer customer to other agencies and resources
- Advise customer of services available (e.g. On-The-Job Training, customized training, employment opportunities, etc.)
- Determine customer skill level
- Schedule customer for comprehensive assessment, such as the Comprehensive Adult Student Assessment Systems (CASAS), if appropriate
- Evaluate the need for supportive services with the customer
- Listen and respond to customer's concern regarding their employment needs in a positive manner
- Identify if customer would benefit from a partner service and make the referral

For customers seeking training, explain the following:

- Labor market research
  - Eligible Training Provider List (ETPL) research
  - Requirement to complete Free Application for Federal Student Aid (FAFSA)
  - Self-sufficiency requirement
-

# Assessment

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## Introduction

There are two (2) types of assessment tools available for the America's Job Center of California (AJCC) staff to access when determining if a customer is eligible for training services. The types of assessments are:

- Comprehensive Assessment, and
  - Desk Side Assessment.
- 

## Comprehensive Assessment

The Comprehensive assessment identifies the customer's grade level equivalency in reading and math. The online Comprehensive Adult Student Assessment Systems (CASAS) is currently being used staff. The Workforce Development Specialist (WDS) will:

- Schedule customer for the CASAS assessment and
- Review assessment scores with the customer.

**Note:** The Workforce Development Technician (WDT) who proctors the assessment will case note the assessment results and enter the 203 activity into CalJOBS.

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## Desk Side Assessment

A desk side assessment is a one-to-one discussion with the customer to identify the customer's strengths, skills, and work values. A desk side assessment may be used in lieu of a comprehensive assessment.

The use of a desk side assessment is determined by the WDS on a case-by-case basis and requires additional case note. Some examples of customers who may be excluded from the comprehensive assessment are:

- Customers with advanced degrees from the United States (e.g. Associate or Bachelor Degrees)
- Students already enrolled in advanced health care or teacher credential programs (e.g. Registered Nurse (RN), radiology, physical therapy, elementary school teacher)
- Customers seeking advanced certifications or credentials (e.g. Licensed Vocational Nursing (LVN) to RN)
- Customers seeking specialized training, such as On-the-Job Training
- Customers with special circumstances as determined by WDS

When conducting a desk side assessment, staff must ask probing questions, follow Eligibility Training Provider (ETP) pre-requisites and utilize the Desk Side Assessment Tool located in the WDD Forms/Manuals website.

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## Assessment, Continued

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### Desk side Assessment tool

Some probing questions to assist with the desk side assessments are, but not limited to:

- What classes have you taken in High School in relation to English and Math?
- What grade did you receive?
- Have you or are you taking any college courses? If yes, what type of courses?

In addition to probing questions, a Desk Side Assessment Tool was developed to assist staff.

During the WDS conversation with the customer if it is determined, there is a need for vocational training, the WDS will ask the customer to provide a verbal response to the desk side assessment tool (questions). The desk side assessment tool is used to help ensure the customer is evaluated and able to make the best decision towards employment.

**Note:** Refer to the WDD Intranet Forms/Manuals website>Training>Desk Side Assessment Tool for the appropriate questions to ask the customer.

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### Eligible Training Provider List (ETPL)

The Eligible Training Provider List (ETPL) programs may include a list of pre-requisite for students to have prior to enrolling in the training. As part of the desk side assessment, AJCC staff will:

- Review the pre-requisites,
  - Discuss the pre-requisites with the customer, and
  - Determine if the customer meets the requirement for enrolling into the training course.
- 

### Desk side assessment disputes

Customers who disagree with the desk side assessment provided by the WDS will be directed to contact the school to take their test and obtain approval for enrolling into the class. Statement of approval from the school must be provided to the WDS prior to getting a Managers approval for training.

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### Case note

AJCC staff will complete a detailed case note regarding assessments. When completing a desk side assessment case note label the subject line "Desk Side Assessment". Case notes should include but not limited to the following information:

- Explain in detail why comprehensive assessment was waived
  - Right to Work documents verified, copied, and placed in file
  - Selective Service Registration Number (males born after 12/31/1959),
  - Highest grade level achieved by the customer,
  - The results of the desk side assessment tool,
  - Work history (as it applies to the training),
- 

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## Assessment, Continued

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### Case note, continued

- Employment history, including type of lay off and job end date, as well as specific skills from past and current experiences
  - Unemployment insurance status
  - Dislocated Worker (including likelihood of returning to same industry or occupation) or Adult
  - Education
  - Employment Barriers
  - Individual Employment Plan summary to customer
  - Copies of Complaint/Grievance Procedures (181, 188.1, 188) given to customer, original retained in file
  - Workshops assigned and/or attended
  - Veteran status
  - Name of training course the customer is interested in and the requirements for admission as listed on the ETPL,
  - Customers dispute of the desk side assessment, if applicable,
  - Justification statement for how it was determined the customer will succeed in the training, and
  - Any other information to help in the determination for training.
- 

### Case note Example

To assist staff, here is an example case note when completing a desk side assessment.

**Example:** Due to the [reason], CASAS testing is not available to [*customer's name*] at this time. A desk side assessment was conducted to determine [*customer's name*] ability to benefit from the requested training.

[*Customer's name*] has a high school diploma and had successfully answered all 4 questions of the verbal desk side assessment tool. [*Customer's name*] has 2 years of recent customer service experience in food service. [*Customer's name*] would like to obtain his Class A driver's license. Per the ETPL listing for Pilot Trucking School, Truck Driving course, the applicants must be 18 years of age or older, good driving record, ability to pass physical exam and drug screen testing, comply with all other DMV and school compliance. [*Customer's name*] meets all of the requirements listed. Based on my desk side assessment, [*customer's name*] will be able to successfully complete this course and obtain employment in this field.

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# Case Management

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## Introduction

The Workforce Development Specialist (WDS) will provide case management services to customers enrolled in Workforce Innovation and Opportunity Act (WIOA) programs based on needs. Case management ensures the provision of appropriate program services to maximize customer success and goal attainment. Case notes are of the utmost importance; above anything else, these case notes evidence the services that were provided to a customer. The following services can be considered individualized:

- Assisted job search
  - Resume critique
  - Mock interviews
  - Comprehensive assessment or Desk side assessment
  - Additional resource referrals
  - On-the-Job Training (OJT)
  - Supportive services
  - Discussions about vocational training
  - Individual Employment Plan (IEP)
- 

## Job Search

Job search occurs when an individual is either unemployed or dissatisfied with his/her current position. As job search services continue the WDS completes the following actions:

Step	Action
1	<ul style="list-style-type: none"><li>• Meet regularly with customer,</li><li>• Open activities accordingly, while providing continued job search assistance, such as:<ul style="list-style-type: none"><li>– Resume Assistance</li><li>– Job search advice</li><li>– Job referrals</li></ul></li></ul>
2	Update CalJOBS entries as needed.
3	Enter <b>Case note</b> on any correspondence or actions taken and enter manual scan as appropriate.

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## Case Management, Continued

### Individualized Service

When it is determined a customer requires individualized services the following actions will be completed by the WDS:

Step	Action
1	Develop IEP with customer.
2	Open and close IEP activity code 205.
3	Enter detailed case note summarizing appointment and activities created.

### WIOA Funded Vocational Training

WIOA funded vocational training enables a customer to obtain key industry skills via the AJCC (One Stop) system. When the WDS determines a customer would benefit from this service, complete the Training Guidance Packet and complete the following:

Step	Action
1	<ul style="list-style-type: none"> <li>Assess training needs of customer using information obtained from previous interviews, questionnaire, and comprehensive or desk-side assessment results, and</li> <li>Develop/amend IEP, and</li> <li>Create activity code 205.</li> </ul>
2	<ul style="list-style-type: none"> <li>Review occupational and labor market information to determine career interest is in demand, and</li> <li>Assist customer with provider selection using the Eligible Training Provider List (ETPL). Encourage customer to visit schools to ask questions and review the training process.</li> </ul>
3	Complete the: <ul style="list-style-type: none"> <li>Self Sufficiency Forecasts and enter results clearly <b>in case note</b>,</li> <li>ITA Form,</li> <li>Program Referral Form,</li> <li>Client Release of Information, and</li> <li>Training Customer Commitment.</li> </ul>
4	Provide the: <ul style="list-style-type: none"> <li>ITA and Program Referral forms to customer for school/provider signatures, and</li> <li>Training checklist with completed case to manager for training case approval.</li> </ul>
5	Submit case file, ITA, Program Referral, and Training checklist to the Manager for review and approval once the ITA and Program Referral are received from the school/provider.
6	<ul style="list-style-type: none"> <li>Determine need for supportive services, and</li> <li>Verify attendance on the 1<sup>st</sup> day of training.</li> </ul>
7	Fax training enrollment verification form (TEV) to the Employment Department (EDD) if customer is receiving Unemployment benefits, if applicable.
8	Enter the following after verifying attendance on the first day of training: <ul style="list-style-type: none"> <li>300 activity code in CalJOBS,</li> <li>Upload Training bundle in CalJOBS,</li> <li>Set calendar control for the training start and end dates, and</li> <li>Case note detailing training information, and all actions taken.</li> </ul>

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## Case Management, Continued

### Benchmarks & Monthly Review

Benchmarks are submitted by training providers to demonstrate the customer's completion of the first two (2) weeks of training and the overall completion.

A monthly case review is conducted by the WDS to ensure training progress is satisfactory and documented.

**Required:** The customer **MUST** be contacted once a month during training and during the last week of training, and activities must be case noted. During this time, the WDS is required to:

Step	Action
1	Verify customer's commencement of training.
2	<ul style="list-style-type: none"> <li>• Review/sign the 1<sup>st</sup> benchmark (invoice for payment).</li> <li>• Communicate with training providers and/or fiscal unit to resolve invoice and payment issues, if applicable, and</li> <li>• Forward to Supervisor.</li> </ul>
3	Maintain monthly contact with customer – case note specifics.
4	Receive monthly progress and attendance reports <ul style="list-style-type: none"> <li>• Gather program and customer data, if requested, and</li> <li>• Provide employment referrals to customer.</li> </ul>
5	Update/extend activities as needed by submitting an amendment to the Supervisor and changing the date in CalJOBS.
6	Verify customer's training is completed.
7	<ul style="list-style-type: none"> <li>• Review/sign the 2<sup>nd</sup> benchmark (invoice for payment).</li> <li>• Communicate with training providers and/or fiscal unit to resolve invoice and payment issues, if applicable,</li> <li>• Forward 2<sup>nd</sup> benchmark invoice to Supervisor, and</li> <li>• Forward completion certificate to CDU for entry of the Measurable Skills Gain.</li> </ul>
8	Enter case note on any correspondence or actions taken.

# Supportive Services

## Introduction

Supportive Services may be considered for customers who are not receiving assistance from other programs and have no other available resources. These services are available to those enrolled in at least one Workforce Innovation and Opportunity Act (WIOA) service.

## Available Services

Available services may include, but are not limited to the following items:

Services	Items
Transportation	<ul style="list-style-type: none"> <li>• Gas Cards</li> <li>• Bus Passes</li> <li>• Reimbursements for transportation claims</li> <li>• Other specialized transportation needs as approved by management</li> </ul>
Ancillary	<ul style="list-style-type: none"> <li>• Training                             <ul style="list-style-type: none"> <li>– Books</li> <li>– Educational Supplies</li> <li>– Parking Passes</li> </ul> </li> <li>• Physical Exams</li> <li>• Drug Testing</li> <li>• Immunizations</li> <li>• Certificates for: Food Handling, Forklift Operation, etc.</li> </ul>
Job Search	Interview Clothing
Employment (items related to specific types of work)	<ul style="list-style-type: none"> <li>• Uniforms</li> <li>• Work Boots</li> <li>• Tools</li> <li>• Gloves</li> <li>• Protective Eye Wear</li> <li>• Background Checks</li> </ul>

**Note:** See *Chapter 3, WIOA Supportive Services* of the Workforce Development Department (WDD) Program Guide for a more detailed list of supportive services and the required authorization levels.

## Supportive Services Processing

**All supportive services require supervisor/manager approval.**

For customer reimbursement, gas cards, bus passes and transportation claims complete the following:

Step	Action
1	Complete Form 804 "Request for Services".
2	Enter the appropriate supportive service code, open and closed on date of service.
3	<b>Enter detailed case note.</b>

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## Supportive Services, Continued

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### Voucher Processing

**All vouchers require supervisor/manager approval.**

Complete the following actions when processing vouchers:

Stage	Description
1	Customer will: <ul style="list-style-type: none"><li>• Obtain a "Mock Receipt" from approved Vendor for requested items, and</li><li>• Submit voucher to WDS.</li></ul>
2	Vendor will: <ul style="list-style-type: none"><li>• Complete voucher, and</li><li>• Return voucher to WDD administration for payment.</li></ul>
3	WDS will: <ul style="list-style-type: none"><li>• Prepare the WDD 804 form,</li><li>• Forward to Supervisor/Manager for approval, and</li><li>• Complete a detailed case note.</li></ul>
4	Supervisor/Manager will: <ul style="list-style-type: none"><li>• Review case, document and mock receipt,</li><li>• Approve WDD 804, and</li><li>• Forward to WDT for processing.</li></ul> <p><b>Note:</b> Refer to the WDT manual for processing.</p>

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# CalJOBS Activity Codes

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## Introduction

The CalJOBS system became the federally recognized “system of record” for tracking and reporting of California’s Workforce Innovation and Opportunity Act (WIOA). The CalJOBS provides a unified and streamlined intake and case management system that enables co-enrollment across programs, and consistent recording of data elements for reporting to the Department of Labor (DOL).

The use of activity codes has a direct relationship to federal reporting and WIOA performance indicators, and should be evaluated closely to ensure the service provided aligns with the definition of the activity code selected for entry into CalJOBS.

CalJOBS provides four (4) separate lists to use when entering activity codes; this section will provide the links for the 4 separate lists.

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## Activity Codes Dictionary

The Activity Codes dictionary list provides the definition, which clearly reflects the intent behind the service provided, and meet the requirements of the program(s). The list includes the following activity codes:

- 002 through 590
- Follow-up activity codes F01 through F22
- Employer Activity Codes E01 through E92

The [Activity Code](#) is located in the Intranet Website under the CalJOBS folder

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## Activity Codes and Performance Crosswalks

To assist with understanding how CalJOBS activity codes impact WIOA performance indicators, the CalJOBS Activity Codes and Performance Crosswalk indicates, with an “x,” the activity codes that trigger inclusion in the Measurable Skill Gains (MSGs) and/or Credential Attainment performance measures. The crosswalk is intended to aid staff in identifying the inclusion of a participant in the measure.

The [Activity Code and Performance Crosswalk](#) list is located in the Intranet Website under the CalJOBS folder.

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## Individual Activity Codes

The CalJOBS Individual activity code provides additional information about each activity code, including which program(s) and reporting category it is associated with, as well as whether or not it extends the exit clock.

The [Individual Activity Code](#) list is located in the Intranet Website under the CalJOBS folder.

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## CalJOBS Activity Codes, Continued

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### CalJOBS Participant Reporting

All local areas are required to report individual participant data via the CalJOBS system, the State's system of record. Participant data cannot be entered more than 30 days in arrears.

Upon discovery of missing or incomplete data, staff should complete the WDD Helpdesk form to request a data change via the ISD Helpdesk.

Failure to Meet Submissions Requirements, late submission of participant data is considered noncompliance with the General Provisions and Standards of Conduct.

**Note:** The WDS will refer to [WSD 13-11](#) for the guidelines regarding timeliness of data.

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### Activity Closure

An exit will automatically (soft exit) occur 90 days after the last date of service. Once 90 days passes, the exit date will show as the last known date of service.

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## Section 2

### Training/Employment

#### Overview

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**Introduction** Training services provide a customer with job skills to obtain employment. In order to ensure the customer achieves a positive outcome the customer must continue to receive case management services, have his/her efforts documented, and have his/her employment information obtained.

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# Completion of Training

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## Introduction

The completion of training marks the participant's attainment of a post-secondary credential. The Workforce Development Specialist (WDS) verifies the customer has completed vocational training successfully.

Once he/she completes training, the customer is given job search assistance until he/she obtains employment.

---

## Required Customer Contact

All customers attending training MUST be contacted within two (2) business days of completion of the program. Multiple attempts must be made and case noted to set an appointment with the customer. Add appropriate activity code when contact is made.

---

## Processing the completion of training

The Workforce Development Specialist (WDS) will complete the following actions when the customer has completed his/her training:

Step	Action
1	Ensure attendance records are on file (customer is required to provide monthly attendance).
2	<ul style="list-style-type: none"><li>• Request Certification of Completion from Training Provider.</li><li>• Add <b>case note details</b> regarding completion of training.</li></ul>
3	<ul style="list-style-type: none"><li>• Close 300 with successful completion code</li><li>• Ensure date of closure matches certification:<ul style="list-style-type: none"><li>– If actual completion date is after the original, planned date of completion written on the ITA, amend the ITA.</li><li>– If customer is not yet employed, provide continued job search assistance, such as:<ul style="list-style-type: none"><li>✓ Resume Assistance</li><li>✓ Job search advice</li><li>✓ Job referrals</li></ul></li></ul></li><li>• Add <i>Certificate of Completion</i> to the case file as soon as possible, and</li><li>• Scan copy to CDU for entry of Measurable Skills Gain. However, it can be entered in the system through the 4<sup>th</sup> quarter follow-up, if necessary.</li></ul>

**Note:** Refer to the *Job Search after Training* section in this chapter for additional details.

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# Job Search after Training

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**Introduction** Once the customer completes training, he/she is given job search assistance until employment is secured or the individual opts out of the program.

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**Required Action** It is a required action to meet with the customer shortly after his/her training has concluded. **MANDATORY:** Set an appointment with the customer within two (2) weeks of training completion to provide job search assistance.

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**Job Search Appointments** The Workforce Development Specialist (WDS) will set Job Search appointments on a bi-weekly or monthly basis with the customer until he/she is employed.

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**Customer contact** There are a variety of methods used for contacting customers; no one method alone should be used exclusively and all methods should be attempted more than once. A productive combination of customer contact consists of:

- Phone calls,
- Emails, and/or
- Letters.

**Case notes** should reflect the number of attempts made to contact the customer as well as the method for the contact.

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**Recommended Process** While it is mandatory to work closely with training customers on his/her job search (i.e. first appointment within two weeks of training and subsequent appointments at least monthly), the process by which this happens is up to the case manager.

The following is a recommended process:

Step	Action
1	Contact the customer to schedule the first appointment, remind them to: <ul style="list-style-type: none"><li>• Update resume in CalJOBS, and</li><li>• Update his/her preferences in CalJOBS (i.e. hours, pay, job preference, etc.).</li></ul>

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*Continued on next page*

## Job Search after Training, Continued

### Recommended Process (continued)

Step	Action
2	<p>Discuss the following during the customer's appointment:</p> <ul style="list-style-type: none"> <li>• Ensure training attendance sheets are on file,</li> <li>• Update the IEP,</li> <li>• Review resume (in CalJOBS and MS Word version), make suggestions as appropriate,</li> <li>• Review preferences set in CalJOBS and other job search engines,</li> <li>• Schedule a follow-up appointment,</li> <li>• Match resume to jobs in CalJOBS and provide referrals,</li> <li>• Provide customer an OJT eligibility certificate and explain the program,</li> <li>• Ensure all customer contact information is correct,</li> <li>• Conduct mock interviews,</li> <li>• Schedule attendance at a workshop (even if he/she has attended before, a refresher is beneficial),</li> <li>• Discuss techniques learned at workshops, and</li> <li>• Work on the 30-second commercial</li> </ul> <p><b>Note:</b> This should be a series of appointments and some items can be repeated at multiple appointments</p>
3	<ul style="list-style-type: none"> <li>• Discuss the plan to assist him/her;</li> <li>• Ensure the customer understands and anticipates phone calls and follow ups.</li> </ul>
4	Continue to make appointments with the customer until he/she is employed.
5	<ul style="list-style-type: none"> <li>• Explain to customer the importance of sharing employment information, and</li> <li>• Request he/she contact the WDS as soon as employment is offered.</li> </ul>
6	Enter visit into the VOS Greeter.
7	Enter all services in CalJOBS with corresponding case notes.

# Employment

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## Introduction

A customer who becomes employed will have the information entered onto the Employment Tracking Sheet. There are two (2) options available in the Employment Tracking Sheet.

When the customer ...	Then ...
<ul style="list-style-type: none"><li>Has completed services, and</li><li>Will no longer be receiving services,</li></ul>	Closure information must be entered into CalJOBS and all activities must be closed.
Will continue to receive services,	A 106 activity should be entered to capture the employment in CalJOBS.

---

## Completing the closure

To close the case, take the following actions:

Step	Action
1	Gather employment information from customer.
2	Close any open activities with "Successful Completion," code 01.
3	Enter employment information, and create closure in CalJOBS. Refer to IIN 17-005 for additional information.
4	Follow up with customer once per quarter for four quarters after the exit quarter (the last quarter in which services were provided).
5	Enter <b>case notes</b> on all actions completed.

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## Employment Tracking Sheet

Each America's Job Center of California (AJCC) has an employment spreadsheet used to track employments. Every employment should be added to the Employment Tracking spreadsheet.

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# Follow-Up

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## Introduction

The Workforce Innovation and Opportunity Act (WIOA) requires that follow-up services must be made available to Adult and Dislocated Workers for a period up to 12 months following exit from the program. The goal of follow-up services is to ensure job retention, wage gains and career progress for participants who have entered unsubsidized employment.

**Note:** Refer to Program Guide, Chapter 2 – Adult and Dislocated Worker for additional guidelines related to Follow-up Services.

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## Frequency

Follow-up on WIOA cases must be conducted for four (4) consecutive quarters starting in the quarter following the exit date (last date of service).

**Example:** The customer exits on 11/15/2021, the follow up periods are as follows:

- 1<sup>st</sup> Quarter: 1/1/2022 to 3/31/2022
  - 2<sup>nd</sup> Quarter: 4/1/2022 to 6/30/2022
  - 3<sup>rd</sup> Quarter: 7/1/2022 to 9/30/2022
  - 4<sup>th</sup> Quarter: 10/1/2022 to 12/31/2022
- 

## Follow-up Activity Code

Adult and Dislocated Worker customers are eligible for follow-up services, but **not for supportive services** during the follow-up period.

**Note:** Refer to the CalJOBS Activity Codes for details on services allowable in the follow-up portion of the WIOA program.

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## Data Entry and Case Note

The Workforce Development Specialist will key in follow-up results in CalJOBS for each quarter and complete detailed case note on each follow-up effort and outcome.

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## Performance Measure

There are six (6) performance measures in WIOA. Local Areas, such as San Bernardino County, are graded based on how they well they do in these areas. The six (6) performance measures are as follows:

1. Percentage of program participants in unsubsidized employment during the 2<sup>nd</sup> quarter after exit.
2. Percentage of program participants in unsubsidized employment during the 4<sup>th</sup> quarter after exit.
3. Median earnings during the 2<sup>nd</sup> quarter after exit from the program.
4. Percentage of program participants who obtained a postsecondary credential or diploma during participation within one year of exit.
5. Percentage of participants achieving measurable skill gains.
6. Effectiveness in serving employers

**Note:** Refer to Program Guide – Chapter 1, WIOA for complete information regarding Performance Measures.

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# Section 3

## Quick Reference

### Overview

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**Introduction** This section provides quick references to assist the Workforce Development Specialist.

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**In this section** This section contains the following topics:

Topic	See Page
Overview	3-1
Activity Flow	3-2
Glossary of Terms	3-3

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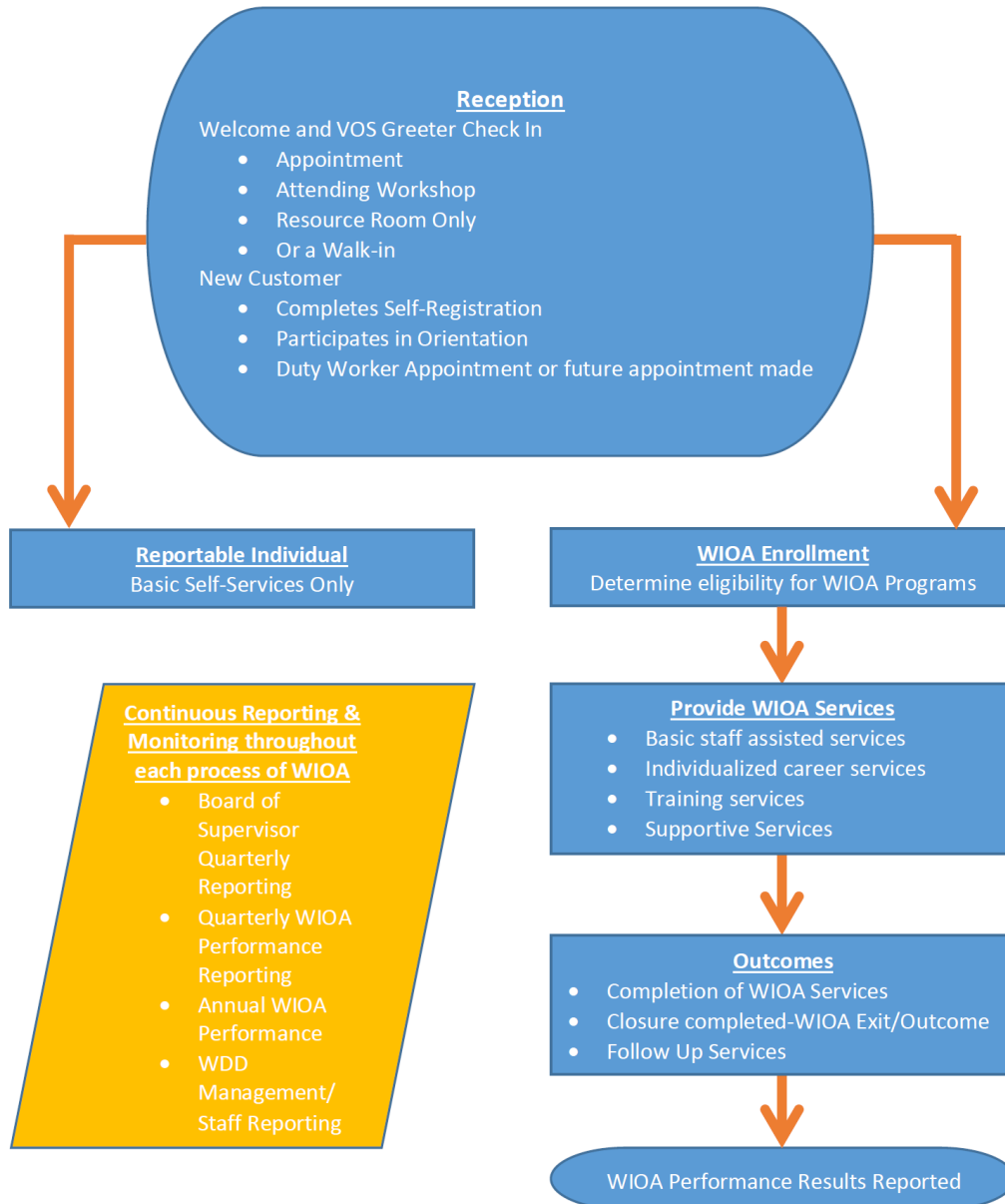
# Activity Flow

## Introduction

The activity flow or movement of a customer within a Workforce Innovation & Opportunity Act (WIOA) program includes some key services/activities and proper documentation. WIOA does not require progression of services; however, there is significant benefit to the customer, in moving through the program in a logical and sequential manner.

## Flow of Services

The following chart outlines the flow of services from enrollment through exit.



# Glossary of Terms

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<b>Introduction</b>	This section provides definition/terms used throughout this chapter.
<b>Adult Customer</b>	A customer enrolled in Workforce Innovation and Opportunity Act (WIOA), 18 or older, not identified as a Dislocated Worker.
<b>Dislocated Worker</b>	Refer to <i>Dislocated Worker Categories Documentation Matrix</i> in AJCC Resources and Forms folder.
<b>Assessment</b>	A review of basic educational skill levels, occupational skills, prior work experience, employability, interests, aptitudes (including interest in non-traditional jobs) and/or supportive service needs.
<b>Case Note or Narrative</b>	All actions taken by the AJCC Staff from registration to exit for the customer must be documented in CalJOBS. Case notes entered must reflect the full scope of activities and services received by the customer.
<b>Basic Career Services</b>	Staff assisted and Self-Service skill-building services available through the Workforce System.
<b>CalJOBS</b>	CalJOBS system is the state recognized “system of record” for tracking and reporting of California’s Workforce Innovation and Opportunity Act (WIOA) program.  <b>Website:</b> <a href="http://www.caljobs.ca.gov">www.caljobs.ca.gov</a>
<b>Eligible Training Provider (ETP)</b>	An Eligible Training Provider (ETP) is a provider, whose program has been approved and made available to WIOA customers through the State Eligible Training Provider List (ETPL).  For information regarding the ETPL, visit <a href="https://wp.sbcounty.gov/workforce/job-seekers/etpl/">https://wp.sbcounty.gov/workforce/job-seekers/etpl/</a>
<b>WIOA Enrollment</b>	The point at which determination is made to enroll a customer into the WIOA program.
<b>Individual Employment Plan (IEP)</b>	Is a plan jointly developed by the customer and the WDS, the plan outlines the customer’s employment goals and maps the services to be provided to achieve the goal.

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## Glossary of Terms, Continued

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**Individualized Career Services** In-depth and staff-assisted skill building services available to enrolled WIOA customers.

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**On-the-Job Training (OJT)** A subsidized position in which the County reimburses a percentage of wages paid to an employee for an agreed upon amount of time. Depending on training need. Eligible customers are those enrolled in WIOA.

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**Self-Sufficiency Calculator** A web-based software program that determines how much income is needed for a given family composition to adequately meet criteria such as:

- Shelter,
- Food,
- Child care,
- Taxes,
- Transportation,
- Health care, and
- Other miscellaneous costs without public or private assistance.

The Self-Sufficiency calculator can be found at: <https://insightcced.org/2018-family-needs-calculator/>.

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**Training Services** Employment related training programs offered through WIOA.

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**Individual Training Account (ITA)** An expenditure account established on behalf of a participant provides for vocational training for enrolled WIAO customers. The ITA amount for each customer varies and is set when the WDS, the ETPL provider, and customer mutually agree.

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## Glossary of Terms, Continued

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**Wagner Peyser Act**

The Wagner-Peyser Act of 1933 is a U.S. federal law established a nationwide system of public employment offices known as the U.S. Employment Service. The Act was amended by the WIOA of 2014. The amendment made the Employment Service part of the One-Stop services delivery system.

The Wagner-Peyser Act is an employment program run by State Employment Development Division (EDD) employees in coordination with the local One-Stop system. Wagner-Peyser services include labor exchange activities similar to WIOA basic and individualized services. Customers who exclusively use Wagner-Peyser services are not required to register for the WIOA program.

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**Workforce Development Board**

Local board members are appointed by the chief elected official (CEO). Workforce Development Boards (WDBs) have the role of strategic planning, policy development and oversight of the local workforce development system. Like the state WDB, the local WDBs require 51% business membership with a minimum of two (2) labor representatives.

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# Section 4

## Best Practices

### Overview

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#### Introduction

The purpose of Best Practices at the San Bernardino County Workforce Development Department (WDD) is to:

- Set fundamental standards that guide us in our work
- Maintain flexibility to meet the special needs of the three diverse regions we serve
- Review our effectiveness and “raise the bar” whenever possible.

Our focus is results-driven so:

- Local employers find employees to meet their business needs;
- The unemployed and underemployed find work; and
- Customers receive the appropriate internal and external training to overcome the barriers preventing them from sustaining employment.

Our goal is to:

- Enlist and engage the support, expertise and experience of WDD’s employees toward continuous improvement, efficiency and results,
  - Promote career development of the WDD staff to ensure attainment of our mission, and
  - Track our progress and provide management with the tools to demonstrate our effectiveness to local, state and federal governments and to the communities at large.
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#### In this section

This section contains the following topics:

Topic	See Page
Overview	4-1
Guiding a Job Seeker	4-2
Helping Customers Build a Resume	4-3
Workshops	4-4

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# Guiding a Job Seeker

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## **Introduction**

In order to assist a job seeker, a Workforce Development Specialist (WDS) first determines a course of action based on individual need(s). The following Best Practice discusses how to connect and make a plan for each customer.

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## **Initial Assessment of Job Seeker**

Perform an informal assessment of the job seeker to determine his/her needs, barriers, and current skills (including lacking and transferrable) to help initiate the Individual Employment Plan (or Action Plan) to be developed. As barriers are identified during the Initial Assessment, refer to partner agencies if needed (e.g. Department of Behavioral Health, State Vocational Rehabilitation and/or the Transitional Assistance Department).

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## **Job Search Techniques**

Job search techniques enhance the customer's job search, and, include but are not limited to:

- Reviewing customer's résumé or discussing the importance of résumé completion.
  - Determining and discussing options for finding employment and make suggestions regarding search techniques.
  - Demonstrating how to use Labor Market Information to find employers in the field/industry of interest.
  - Encouraging the customer to "think outside of the box," perhaps discussing options for certification or upgrading skills.
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# Helping Customers build a Résumé

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## Introduction

An integral part of a customer's job search is the résumé he/she presents to employers. Workforce Development Specialists (WDS) assist customers with building the best possible resume.

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## Resume workshops

The Workforce Development Department (WDD) offers several workshops designed to help customers with creating a résumé:

- **Professional Edge:** Four day workshop to help develop skills for job seekers that include, strength finders, develop resume formats, cover letters, how to use social media for contemporary job searching skills (LinkedIn), discovering the best attitudes for job search, interview strategies, practicing mock interviews, communicating effectively, and providing a career forum with employers.
  - **Steps to Economic and Personal Success (STEPS):** Two day workshop, a guide to self-sufficiency, tools are provided for ways to improve work or personal life relationships, motivate self-beliefs in achieving goals, and how to find confidence while job searching.
  - **Journey to Employment:** Two (2) hour workshop assisting job seekers with developing networking skills, how to find labor market information, explain soft skills, application tips, develop resumes, dress for success, understanding a power statement.
  - **Résumé online/virtual workshop:** Workshop is one and half-hour, a live virtual workshop to assist with developing and answering questions about creating a résumé for use during job search activities.
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## WinWay Resume Writer

WinWay is a computer format program available in the Resource Room. Customer enters his/her information and the program formats the résumé.

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# Workshops

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**Introduction** Workshop topics may vary in each America's Job Center of California (AJCC). The following Best Practice covers setting an engaging tone and provides an outline for facilitators to follow.

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**Setting the tone** Setting the tone in workshops creates an atmosphere of friendliness, openness, and respectful behavior. Open workshop discussion with an introduction and facilitator credentials.

**Example:**

- I have facilitated Job Search related workshops since 1993...
- I have extensive experience in writing and creating résumés...
- I am a certified Global Career Development Facilitator...
- Education background, other certifications etc.”

As a best practice, offering experience establishes a solid foundation and lends credibility to the facilitator's ability to provide information and guidance to the workshop attendees. Make a “last call” for the workshop 5 minutes after the scheduled start time. This allows time for customers who are running late.

Begin a discussion regarding the importance of attending all of the different workshops offered at the AJCC. This further reinforces the idea the audience (job seekers) should be fully prepared prior to embarking on his/her job search.

Offer a question and answer time prior to the presentation to ensure the customers' objectives are met. This provides for light conversation and “breaks the ice”.

Be improvisational and use passion (and other emotions) to achieve desired results to keep the audience engaged and give the tone of the presentation a “real life” effect.

Offer anecdotes and success stories to demonstrate other people who have “bought in” to the technique have used it successfully.

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