

CHAPTER 12

Special Grants

Overview

Introduction Under Workforce Innovation and Opportunity Act (WIOA), local workforce boards have the opportunity to apply for discretionary grants that are awarded by the Secretary of Labor to respond to assist with recovery efforts during national emergencies.

These grants have established guidelines regarding eligibility and services. This chapter contains information regarding special grants available through WIOA.

References This handbook chapter contains mandates and guidelines stated in:

- WIOA regulations, signed into law in 2014,
- The Code of Federal Register (CFR), Title 20 Part V and Part VI, and
- State directives received from the Department of Labor (DOL) and/or Employment Development Department (EDD) as outlined in the table below.

DOL	EDD
Training and Employment Guidance Letters (TEGL):	Workforce Service Directives (WSD):
• TEGL 1-17	• WSD 18-08
• TEGL 2-15	• WSD 17-08
	• WSD 16-16
	• WSD 16-10

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Overview, Continued

Forms

The forms discussed in this Chapter are available on the Intranet or through the WDD Fiscal Assistant.

Form	Location
WDD 804: Request for Services	WDD Intranet>Forms and Manuals>Supportive Services tab
WDD Customer Statement	WDD Intranet>Forms and Manuals>Enrollment forms tab
America’s Job Center of California (AJCC) Partner Referral	WDD Intranet>Forms and Manuals>Partner Referral Tracking tab
Advisor Appointment Information (AAI)	WDD Intranet>Forms and Manuals>Enrollment forms tab

Trade and Economic Transition National Dislocated Worker Grant (TET NDWG)

Introduction The Trade and Economic Transition National Dislocated Worker Grant (TET NDWG) is designed to address ongoing workforce and economic challenges by assisting Dislocated Workers (DWs) to re-enter the workforce.

This section provides information and guidance for America’s Job Center of California (AJCC) staff regarding career and training services available only to DWs through the TET NDWG.

Grant allotment San Bernardino County Workforce Development Board (WDB) agreed to serve 136 customers under the “**TET NDWG**” and provide training services as outlined in the table below.

Training	Total Customers	Average Cost Per Customer
On-the-Job Training (OJT)	50	\$4,000
Individual Training Account (ITA)	106	\$3,958

Timeline Enrollment into the “**TET NDWG**” was effective February 21, 2019 and customers are required to complete training by September 30, 2021. Customers scheduled to complete training after September 30, 2021 will not be funded by this grant.

Eligible customers To be eligible for services under this grant, customers must:

- Be Dislocated Workers (DW), and
- Meet the eligibility requirements for dislocation as described in the **Dislocated Worker Categories** block in this section.

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Trade and Economic Transition National Dislocated Worker Grant (TET NDWG), Continued

Dislocated Worker categories

The table below outlines the various categories and descriptions under which DWs may qualify.

Category	Description
1	<ul style="list-style-type: none"> Terminated or laid off, or Received notice of termination or layoff, and Is eligible for or has exhausted entitlement to Unemployment Insurance (UI), and Is unlikely to return to previous industry or occupation.
2	<ul style="list-style-type: none"> Terminated or laid off, or Received notice of termination or layoff, and Has been employed for sufficient duration (based on state policy) to demonstrate workforce attachment but is not eligible for UI due to insufficient earnings, or the employer is not covered under the State UI law, and Is unlikely to return to previous industry or occupation.
3	<ul style="list-style-type: none"> Individual is terminated or laid off, or Received notice of terminating or layoff, from employment as a result of the permanent closure of or substantial layoff at a plant, facility or enterprise.
4	Individual is employed at a facility and the employer has announced the facility will close.
5	Individual was previously self-employed (including farmers, ranchers and fisherman), but is unemployed due to general economic conditions in the community of residence or because of a natural disaster.
6	<p>Displaced Homemaker</p> <ul style="list-style-type: none"> An individual who has been providing unpaid services to a family member in the home and has been dependent on the income of another family member but is no longer supported by that income, or Is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, or a call or order to active duty, or a permanent change of situation, or the service-connected death or disability of the family member, and Is unemployed or under employed and is experiencing difficulty obtaining or upgrading employment.
7	The spouse of a member of the Armed Forces on active duty, and who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member.
8	The spouse of a member of the Armed Forces on active duty who is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.
9	<p>Dislocated Worker Grant (DWG) Eligibility- Individual does not meet criteria outlined for Dislocated Worker in categories 1 – 8 above, but is eligible under WIOA Law:</p> <ul style="list-style-type: none"> WIOA Title ID National Programs, Sec. 170 National Dislocated Worker grants, relating to Sec 170(b)(1)(A) workers affected by major economic dislocations, or Sec. 170(b)(1)(B) workers affected by an emergency or major disaster.

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Trade and Economic Transition National Dislocated Worker Grant (TET NDWG), Continued

EMACS time coding

Time spent providing “**TET NDWG**” career and training services must be coded proportionally in the Employment Management and Compensation System (EMACS) to Program Code **0100**.

Example: Workforce Development Specialist (WDS) completed 4 TET NDWG OJTs in 1 week, and each OJT took 3 hours to complete; time coded to 0100 for the week would be 12 hours.

Reporting

DW customers enrolled in training activities and On-the-Job Trainings (OJT) must be tracked on a monthly basis using the existing month-end report.

The following staff are responsible for submitting the month-end report to the Staff Analyst II for Adult Programs:

- America’s Job Center of California (AJCC) Managers are responsible for providing the number of TET NDWG customers enrolled in training activities and entering information on budget reports.
 - The Business Services Technician (BST) is responsible for providing the number of TET NDWG customers enrolled in OJT.
-

Individual Training Account

ITAs must be completed and approved as indicated below:

- The Workforce Development Specialist (WDS) checks the box for **Other (specify)** and enters “**TET NDWG**” in the box titled **Funding Category** when completing an ITA.
 - The AJCC Manager uses the **Approved ITA Contract #** from the newly-created **NDWG tab** of the Monthly Services Budget Tracking sheet for their respective AJCC when approving ITAs.
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On-the-Job Training contracts

OJTs are tracked in real time. To ensure the contract number coincides with the appropriate grant, when requesting a contract number, the BST must indicate the funding source as “**TET NDWG.**”

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Trade and Economic Transition National Dislocated Worker Grant (TET NDWG), Continued

CalJOBS entries

Staff must use code “**National Dislocated Worker Grant NDWG**” in CalJOBS under the WIOA Grants Eligibility Section for DWs when entering:

- The training activity, including every activity provided **after** training through completion of the case.
 - Basic and individualized services received **prior** to training are coded to DW per the normal process.

Refer to the **User Guide** for instructions when entering the “**TET NDWG**” code to the WIOA Application and activities in CalJOBS. The User Guide is located on the **WDD Intranet site>forms and manuals>guide, how to & field description folder tab**.

Case notes

Case notes are an important tracking system for capturing historical records of customer services provided by AJCC staff.

The table below provides guidelines, specific subject titles and content required when entering case notes and submitting the case to the AJCC Manager for training review and approval.

Subject Title: TET NDWG -	Case Note Contents
Referral	Provide a brief summary of the training referral.
Training Type	<ul style="list-style-type: none"> • Complete upon entry of the 300 or 301 activity in CalJOBS. • Provide the training type in the subject line: <ul style="list-style-type: none"> – TET NDWG – Training OJT, or – TET NDWG - Training ITA. • Enter the training activity code, projected training dates, and the training provider name.
Supportive Services	<ul style="list-style-type: none"> • Enter the supportive service activity code. • Provide the total amount, a justification for the supportive service, and • Explain how it relates to the training or employment activities.
No Show	Customer did not show up to a scheduled appointment, meeting, or training.
Check-In	<ul style="list-style-type: none"> • Provide a summary of the monthly or quarterly check-in. <ul style="list-style-type: none"> – Face-to-face meeting or over the phone. • Document unsuccessful attempts.
Site Visit	<ul style="list-style-type: none"> • Entered by the WDS for all OJT invoices/progress reports received. • Provide the purpose of the visit (e.g. collect timesheets, first day of training, check-in with the employer/training provider, etc.). • Provide customer progress updates and any observations.
Completion	<ul style="list-style-type: none"> • Provide a summary of the results of the services.
Dropped Activity	<ul style="list-style-type: none"> • Provide the activity code the customer dropped out of, • The reason for the drop, and • Any attempts by staff to mitigate the activity drop.

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Trade and Economic Transition National Dislocated Worker Grant (TET NDWG), Continued

Case notes, continued

Subject Title: TET NDWG -	Case Note Contents
Employment	<ul style="list-style-type: none"> • Enter unsubsidized employment, • Include job title, employer, wage per hour, date of employment, and • If the employment is training related, WDS must create a CalJOBS outcome and enter the customer's unsubsidized employment information.
Exit	<ul style="list-style-type: none"> • Provide a status update when an: <ul style="list-style-type: none"> – Exit occurs, or – Is about to occur (90 calendar days of no CalJOBS activity).
Follow-Up	<p>Provide a summary of any follow-up contacts made with the customer.</p> <p>Note: If a customer has exited, a follow-up activity or case note will not re-open the customer's WIOA application.</p>
Other	<p>For all other case notes that do not meet the Subject Title categories, "TET NDWG – Other" may be used as the subject title.</p>

COVID-19 Employment Recovery National Dislocated Worker Grant (ER NDWG)

Introduction This section provides information and guidance for America’s Job Center of California (AJCC) staff regarding the COVID-19 Employment Recovery National Dislocated Worker Grant (ER NDWG) under the Coronavirus Aid, Relief and Economic Security (CARES) Act.

The ER NDWG provides career and training services to Dislocated Workers (DWs) only and is designed to augment DW formula funds after large-scale layoff events to assist DWs in re-entering the workforce.

Grant allotment The San Bernardino County Workforce Development Board (WDB) was awarded \$250,000 for the “**ER NDWG**”, which includes \$44,500 towards administrative costs, calculated by the Fiscal Unit.

The San Bernardino County WDB agreed to serve 57 customers for the “**ER NDWG**” and provide \$10,000 in supportive and training services as outlined in the table below.

Training	Total Customers	Amount	Average Cost Per Customer
On-the-Job Training (OJT)	19	\$76,500	\$4,026
Individual Training Account (ITA)	38	\$119,000	\$3,131

Timeline Enrollment for the “**ER NDWG**” was effective April 10, 2020. All customers must complete training by March 31, 2022. Customers scheduled to complete training after March 31, 2022 will not be funded by this grant.

Eligible customers To be eligible for services under this grant customers must be:

- DWs who meet the eligibility requirements for dislocation as described in the **Dislocated Worker Categories** block in this section.
- Members of the United States Armed Forces who:
 - Were on Active Duty or National Guard activation, and
 - Are involuntarily separated from duty or accepts early release, and
 - Are not entitled to retirement or retained pay.

Performance measures The following performance indicators must be reported in CaJOBS for DW customers enrolled in training or education activities:

- Measurable Skill Gains
- Credential Attainment

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COVID-19 Employment Recovery National Dislocated Worker Grant (ER NDWG), Continued

EMACS time coding

Time spent providing “**ER NDWG**” career and training services must be coded proportionally in the Employment Management and Compensation System (EMACS) to Program Code **0145**.

Example: Workforce Development Specialist (WDS) completed four (4) ER NDWG OJTs in one (1) week, and each OJT took three (3) hours to complete; time coded for the week would be 12 hours to 0145.

Reporting

DW customers enrolled in training activities and On-the-Job Trainings (OJT) must be tracked on a monthly basis using the existing month-end report.

The following staff are responsible for collaborating on the month-end report:

- America’s Job Center of California (AJCC) Managers are responsible for entering information on budget reports.
 - Centralized Data Unit Analyst is responsible for providing the number of ER NDWG customers enrolled in training activities to the Administrative Supervisor II (Admin. Sup. II).
 - The Business Services Technician (BST) is responsible for providing the number of ER NDWG customers enrolled in OJT.
-

Individual Training Account

Individual Training Accounts (ITAs) must be completed and approved as indicated below:

- The Workforce Development Specialist (WDS) checks the box for **Other (specify)** and enters “**ER NDWG**” in the box titled **Funding Category** when completing an ITA.
 - The AJCC Manager uses the **Approved ITA Contract #** from the newly created **ER NDWG tab** of the Monthly Services Budget Tracking sheet for their respective AJCC when approving ITAs.
-

On-the-Job Training contracts

OJTs are tracked in real time. To ensure the contract number corresponds to the appropriate grant, when requesting a contract number, the Business Services Representative (BSR) must indicate the funding source as “**ER NDWG**”.

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COVID-19 Employment Recovery National Dislocated Worker Grant (ER NDWG), Continued

CalJOBS entries

Staff must use code “**ER NDWG**” in CalJOBS for DW’s when entering:

- The training activity, including every activity provided **after** training begins through completion of the case.
 - Basic and individualized services received **prior** to training are coded to DW per the normal process.
- Eligibility for WIOA Application

Refer to the **User Guide** for instructions when entering/adding “**ER NDWG**” code to the WIOA Application and activities in CalJOBS. The User Guide is located on the **WDD Intranet site>forms and manuals>guide, how to & field description folder tab.**

Activity code

The “**ER NDWG**” grant code is **1194** and the activities provided include, but are not limited to:

- Job placement assistance in high-demand sectors,
- Training, including work-based learning, and
- Follow-up services to ensure participant success and receipt of supportive services.

Case notes

Case notes are an important tracking system for capturing historical records of customer services provided by AJCC staff.

The table below provides guidelines, specific subject titles and content required when entering case notes and submitting the case to the AJCC Manager for training review and approval.

Subject Title: COVID-19 ER NDWG -	Case Note Contents
Referral	<ul style="list-style-type: none"> • Provide a brief summary of the training referral. • Include all of the training information.
Training Type	<ul style="list-style-type: none"> • Complete upon entry of the 300 or 301 activity in CalJOBS. • Provide the training type in the subject line: <ul style="list-style-type: none"> – ER NDWG - Training OJT, or – ER NDWG - Training ITA, and • Include the training activity code, projected training dates, and the training provider name. <p>Example: ER NDWG - Training ITA or ER NDWG - Training OJT.</p>
Safety Training	<ul style="list-style-type: none"> • Provide the details of the safety training in the subject line. • Include the training activity code, projected training dates, training provider name, location, participants’ attendance, and completion of the training.

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COVID-19 Employment Recovery National Dislocated Worker Grant (ER NDWG), Continued

Case notes, continued

Subject Title: COVID-19 ER NDWG -	Case Note Contents
Supportive Services	<ul style="list-style-type: none"> • Enter the supportive service activity code. • Provide the total amount, a justification for the supportive service, and • Explain how it relates to the employment, career, or training activities.
No Show	Customer did not show up to a scheduled appointment, meeting, or training.
Check-In	<ul style="list-style-type: none"> • Provide a summary of the monthly or quarterly check-in. <ul style="list-style-type: none"> – Face-to-face meeting or over the phone. • Document unsuccessful attempts.
Site Visit	<ul style="list-style-type: none"> • Enter OJT invoices/progress reports received. • Provide the purpose of the visit (e.g. collect timesheets, first day of training, check-in with the employer/training provider, etc.). • Provide customer progress updates and any observations.
Completion	Provide a summary of the results of the services.
Dropped Activity	<ul style="list-style-type: none"> • Provide the activity code the participant dropped out of, • The reason for the drop out, and • Any attempts by staff to mitigate the activity drop.
Employment	<ul style="list-style-type: none"> • Enter unsubsidized employment • Include job title, employer, wage per hour, date of employment • If the employment is training related, create a CalJOBS outcome and enter customer's unsubsidized employment information.
Exit	Provide a status update when: <ul style="list-style-type: none"> • An exit occurs, or • Is about to occur (90 calendar days of no CalJOBS activity).
Follow-Up	Provide a summary of any follow-up contacts made with the customer. Note: If a customer has exited, a follow-up activity or case note will not re-open the customer's WIOA application.
Other	For all other case notes that do not meet the Subject Title categories, " <i>ER NDWG – Other</i> " may be used as the subject title. This should be used by AJCC Managers for training approvals.

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COVID-19 Employment Recovery National Dislocated Worker Grant (ER NDWG), Continued

Case note examples

Case notes help tell the story of the “who, what, when, where, and how” of an individual’s WIOA participation. All cases notes should end with the WDS name and title, location and phone number.

The table below provides three (3) case note examples.

Scenario	Case Note Examples
1	<p>Customer is enrolled into an Eligible Training Provider List (ETPL) training course, activity 300 entered into CalJOBS and includes the managers approval:</p> <p>Subject line: COVID-19 ER NWDG – New WIOA Program Referral/ITA Description: Per manager [manager name], customer approved for new training program at HealthStaff Training Institute. Prepared WIOA Program Referral and ITA as follows:</p> <p>ETPL Provider: HealthStaff Training Institute ETPL Program: Computerized Office and Accounting Hybrid ETPL Cost: \$4,295 WIOA Cost: \$4,295</p> <p>Completed ITA Bundle, Review Checklist forwarded to manager for approval.</p>
2	<p>Logs the activity for record keeping purposes, updates customer’s training status and the documents uploaded into CalJOBS.</p> <p>Subject: COVID-19 ER NDWG – Other: School Report 03/2019 Description: Received school report for March 26, 2019. Period covered: February 24 to March 02 Mon-Thu present, Fri online Period covered: March 03 to March 09 Mon-Thu present, Fri online.</p> <p>School report scanned/uploaded to CalJOBS.</p>
3	<p>Supportive services activity code. The case manager provided notes on Activity 181, the type of participation that created the eligibility (attending training funded through the grant), and the need which warranted the supportive service (low income).</p> <p>Subject: COVID-19 ER NDWG – Supportive Service Description: Activity Code #181 – Transportation Assistance open/close successfully this date.</p> <p>Customer is attending WIOA/COVID-19 ER NDWG Funded Training. Customer’s only source of income is UIB. Customer is low income and in financial need of transportation assistance to help them get to/from training.</p> <p>Prepared 804 for \$50.00 gas card issuance 804 Forwarded to supervisor for approval 804 Forwarded to WDT for issuance</p>

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COVID-19 Employment Recovery National Dislocated Worker Grant (ER NDWG), Continued

Fiscal reporting The Fiscal Unit must submit completed expenditure reports (cumulative) and narrative reports (successive) to the state by the 20th of each month through CalJOBS, including reports with \$0.00 expenditures. The first month's report is due May 20, 2020.

In addition to the monthly reports, the state requires a closeout and an end- -of- project report. The report is due 60 days after the project end date for performance period 4/10/2020 through 3/31/2022.

Note: If a due date falls on a weekend or holiday, the reports are due on the last business day prior to the due date.

WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals

Introduction

This section provides information and guidance for America's Job Centers of California (AJCC) staff regarding supportive services available to customers under the Workforce Innovation and Opportunity Act (WIOA) Dislocated Workers (DW) funds for underserved COVID-19 impacted individuals.

The eligibility requirements and use of funds differs from the traditional WIOA 25% DW worker funds and does not apply to other WIOA funds.

This section contains information regarding the eligibility criteria for individuals to receive funds, in addition to the allowable use of funds for supportive services.

Underserved populations

Workforce Development Department (WDD) identifies underserved populations who are in need of supportive services as, including but not limited to:

- Veterans
 - Displaced Homemakers
 - Low-income individuals
 - Homeless individuals
 - English Language Learner (ELL), Foreign Born Refugees
 - ELL Navigator programs' participants
 - The Disabled
 - Youth who aged out of Foster Care
 - Elderly individuals (age 55)
 - Ex-offenders
-

COVID-19 eligibility criteria

DW customers are still evaluated for WIOA Title I eligibility and must satisfy all of the following criteria to be eligible for supportive services funds:

- Enrolled in Title I DW services
 - Have not received wages above 400% of the Federal Poverty Level (FPL) for the last six (6) months of income:
 - Household Annual Salary for 400% FPL is as follows:
 - ✓ Family of 1: \$51,040
 - ✓ Family of 2: \$68,960
 - ✓ Family of 3: \$86,880
 - ✓ Family of 4: \$104,800
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WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals, Continued

COVID-19 eligibility criteria, continued

- Meet one of the following criteria:
 - Laid off due to COVID-19.
 - Experienced a reduction in hours and/or pay due to COVID-19.
 - Unable to work for any of the following COVID-19 related reasons:
 - ✓ Subject to quarantine,
 - ✓ Caregiver for someone who is subject to quarantine,
 - ✓ Need to care for children because of school closure or closure of other childcare provider.
 - At higher risk of getting seriously ill from COVID-19, or lives with someone at higher risk, as outlined on the [California Department of Public Health COVID-19 website](#).
 - Required to telework, but does not have the necessary equipment.

Notes:

- An individual who is not eligible for the DW program can be enrolled into the Title I Adult program and be provided the tiered supportive services, as long as he/she meets all of the COVID-19 related eligibility criteria listed above.
 - Staff will enroll the Adult using the participant Grant Code 2051.
 - Supportive services funds will still be charged to Grant Code 1187.
- Individuals may self-attest (WDD Customer Statement form) to his/her income and the COVID-19 related eligibility criteria. Staff must enter detailed case notes.

Types of supportive services

Supportive services may be provided to customers who are impacted by COVID-19, with an emphasis on serving the underserved populations. The supportive services may include, but are not limited to:

- Equipment necessary to telework (e.g. computer, internet, etc.)
- Housing assistance (rent/mortgage)
- Utility assistance
- Childcare
- Transportation (e.g. car repairs, tires, etc.)

Notes:

- Per Federal regulations - Groceries and on-site meals for program participants are beyond the scope of WIOA. Supportive services cannot be used for food or groceries.
- WIOA does not allow for paying late fees or penalties. **Example:** If a customer owes \$335 on a utility bill and \$35 of that is a late fee/penalty, staff can only pay the \$300.
- Any WIOA Adult or DW funds used to provide supportive services are not counted towards the \$800 limit of tier two (2) supportive services.

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WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals, Continued

Supportive services tiers

The San Bernardino County Local Workforce Delivery Area (SBC-LWDA) was awarded \$315,000 for WIOA 25% DW grant Fund 1187 to provide supportive services to 472 customers impacted by COVID-19 by December 31, 2020.

Supportive services are available in two (2) tiers:

- **Tier 1** – A customer who is receiving at least 50% of his/her previous wages either from his/her employer directly or with Unemployment Insurance (UI) payments, may receive supportive services totaling \$400.
 - Requested dollar amount - \$63,000
 - Number of participants receiving supportive services – 157
- **Tier 2** – A customer receiving less than 50% of his/her wages from his/her employer directly or with UI payments, may receive supportive services totaling \$800.
 - Requested dollar amount - \$252,000
 - Number of participants receiving supportive services – 315

Performance measures

Performance measures only apply to customers co-enrolled with WIOA funds. Customers enrolled solely under this grant will not be included in WDD's performance measures.

Gas cards, vouchers, and reimbursements

AJCC staff will continue following the current process for issuing gas cards/vouchers and processing reimbursements through the Fiscal Unit. Staff will obtain all required signatures and documentation from the customer when issuing gas cards or when processing reimbursements.

Note: An alternate County building location may be designated for the issuance of gas cards/vouchers. Refer to the **Customer pickup locations** block in this section for additional instructions.

Gift cards

WDD will not be issuing gift cards for customers under this special grant.

Customer pickup locations

During emergency situations (i.e. COVID-19, etc.), the AJCC locations will have two (2) options for customers who need to pick up gas cards/vouchers or purchased items by appointment only.

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WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals, Continued

Customer pickup locations, continued

The following options are for in-person appointments only:

Option One:

Customers may go to one of the following government locations where a security guard is present to ensure staff safety:

- [San Bernardino County Government Center](#) (map included in link)
385 N. Arrowhead, San Bernardino
- [High Desert Government Center](#) (map included in link)
15900 Smoke Tree Street, 1st floor, Hesperia

Option Two:

Customers may go to the AJCC. Two (2) AJCC staff must be present during the in-person appointment for safety reasons. Supervisors/Managers will determine who will be present, if this option is selected.

Notes:

- Each staff member is expected to bring his/her own Personal Protective Equipment (PPE) and wipe down the area after each appointment and at the end of the day when going to one of the Government Centers.
- Refer to the **Service delivery of items at the Government Center** block in this section for guidelines when going to the Government Centers.

Service delivery of items at the Government Center

Workforce Development Technician (WDT) will follow the process below for issuing supportive services at the Government Center:

Stage	Description
1	<p>WDT:</p> <ul style="list-style-type: none"> • Arrives at the designated County building, • Shows his/her County identification, • Checks in with the security desk personnel, and • Signs-in no fewer than 10 minutes prior to the customer arriving at the center.
2	Customer checks in with security giving the name of the WDT with whom the appointment is scheduled.
3	<p>Security personnel refers the WDT and customer to a designated area where the supportive services will be issued.</p> <p><u>Note:</u> WDD staff will bring his/her own Personal Protective Equipment (PPE) and wipe down the area after each appointment and at the end of the day.</p>

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WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals, Continued

Service delivery of items at the Government Center, continued

Stage	Description
4	<p>WDT:</p> <ul style="list-style-type: none"> • Checks the customer’s photo identification to verify identity, • Obtains the customer’s signature on the appropriate document(s) and hands the goods or services to the customer, • Engages the customer to ensure he/she has received the necessary services, and • Escorts the customer out, while also letting the security guard know he/she is leaving as well. <p>Note: Depending on the location, both the WDT and customer may need to sign out on the visitor log.</p>

Staff process for purchases

The following table outlines the temporary process for AJCC staff when reviewing and issuing supportive services for the payment of utilities, rent, childcare, and/or purchases needed for customers to telework.

Stage	Description
1	<p>Customer contacts the AJCC via phone or submits an email through the WDD website.</p> <p>Note: The Communications/Website Administrator will email the appropriate AJCC Supervisor/Manager of any emails received through the website for any customer requesting WIOA services.</p>
2	<p>AJCC Office Assistant (OA) or Workforce Development Technician (WDT):</p> <ul style="list-style-type: none"> • Monitors the AJCC phone lines. • Responds to any phone calls received throughout the day. • Verifies if the customer is enrolled in CalJOBS, if: <ul style="list-style-type: none"> – Yes, confirms all the information is current and provides name of the Workforce Development Specialist (WDS) who will be contacting them for services. – No, informs the customer he/she must be registered and enrolled prior to receiving supportive services.

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WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals, Continued

, continued

Stage	Description				
3	<p>WDS:</p> <ul style="list-style-type: none"> • Contacts the customer to determine if he/she is an Adult or DW, • Checks CalJOBS and case notes for services the customer is currently receiving or has previously received prior to the stay-at-home order, • Obtains income verification or the self-attestation (WDD Customer Statement form) regarding income to determine what tier of supportive services will be provided, • Discusses with the customer what supportive services are needed, <table border="1" data-bbox="298 625 1446 1171"> <thead> <tr> <th data-bbox="298 625 607 688">If the supportive service is for...</th> <th data-bbox="607 625 1446 688">Then WDS...</th> </tr> </thead> <tbody> <tr> <td data-bbox="298 688 607 1171">Utility payment, rent or childcare,</td> <td data-bbox="607 688 1446 1171"> <ul style="list-style-type: none"> • Obtains a copy of the utility, rent, or childcare bill, and • Verifies the name on the account matches the customer's name. <ul style="list-style-type: none"> – Bills where the name does not match the customer's name will only be accepted and paid if the address on the WIOA application and driver's license/identification card match the address on the bill. • Inform the customer he/she must provide an original wet signature on the WDD 804: Request for Services or any other documents once the office resumes normal operation. <p>Reminder: WIOA does not allow payment for late fees or penalties.</p> </td> </tr> </tbody> </table>	If the supportive service is for...	Then WDS...	Utility payment, rent or childcare,	<ul style="list-style-type: none"> • Obtains a copy of the utility, rent, or childcare bill, and • Verifies the name on the account matches the customer's name. <ul style="list-style-type: none"> – Bills where the name does not match the customer's name will only be accepted and paid if the address on the WIOA application and driver's license/identification card match the address on the bill. • Inform the customer he/she must provide an original wet signature on the WDD 804: Request for Services or any other documents once the office resumes normal operation. <p>Reminder: WIOA does not allow payment for late fees or penalties.</p>
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4	<p>Supervisor/Managers:</p> <ul style="list-style-type: none"> • Reviews the supportive service requests submitted, • Signs the WDD 804 form, and <p>Informs the WDS if approved or if corrections are needed prior to emailing the purchase request to the designated AJCC WDT for processing.</p>				
5	<p>WDS:</p> <ul style="list-style-type: none"> • Enters the following information in CalJOBS: <ul style="list-style-type: none"> – Activity codes along with the assisted service provided on the date of issuance, and – Grant code 1187 for DW customers in the application and under the activity (Refer to User Guide, <i>WDD-location of User Guide</i>) for the process on how to enter the grant code information in CalJOBS). • Emails request with all the documentation and information to the designated AJCC WDT who will either pay or purchase the goods and service for the customer. <ul style="list-style-type: none"> – Completes a detailed case note of the supportive services and when the request was sent to the AJCC WDT. <p>Enter participant grant code 2051 for Adult customers and supportive services grant code 1187.</p>				

Continued on next page

WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals, Continued

Staff process for purchases, continued

Stage	Description						
6	<p>WDT:</p> <ul style="list-style-type: none"> Reviews documents to determine if a utility/rent/child care bill is being paid or if it is a request for a purchase of goods and services. <table border="1" data-bbox="298 464 1458 968"> <thead> <tr> <th data-bbox="298 464 607 533">If the supportive service is for...</th> <th data-bbox="607 464 1458 533">Then WDT...</th> </tr> </thead> <tbody> <tr> <td data-bbox="298 533 607 716">Utility payment, rent or childcare,</td> <td data-bbox="607 533 1458 716"> <ul style="list-style-type: none"> Calls utility company, childcare provider, or landlord to pay the bill using the county's Cal-Card <ul style="list-style-type: none"> Obtains receipt of payment completed for the utility bill or rent, and Forwards receipt of payment to the WDS. </td> </tr> <tr> <td data-bbox="298 716 607 968">Goods and services,</td> <td data-bbox="607 716 1458 968"> <ul style="list-style-type: none"> Purchases the goods and services requested by the WDS <ul style="list-style-type: none"> Has the goods and services delivered to the WDD Administration office for WDS to pick up, Informs the WDS what date the goods and services will be delivered, and Forwards payment receipt to the WDS to retain with the WDD 804 form. </td> </tr> </tbody> </table> <p>Reminder: Payment for late fees or penalties is not allowed by WIOA. If late fees or penalties are included in the bill, subtract the amount before paying the bill.</p>	If the supportive service is for...	Then WDT...	Utility payment, rent or childcare,	<ul style="list-style-type: none"> Calls utility company, childcare provider, or landlord to pay the bill using the county's Cal-Card <ul style="list-style-type: none"> Obtains receipt of payment completed for the utility bill or rent, and Forwards receipt of payment to the WDS. 	Goods and services,	<ul style="list-style-type: none"> Purchases the goods and services requested by the WDS <ul style="list-style-type: none"> Has the goods and services delivered to the WDD Administration office for WDS to pick up, Informs the WDS what date the goods and services will be delivered, and Forwards payment receipt to the WDS to retain with the WDD 804 form.
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7	<p>Admin:</p> <ul style="list-style-type: none"> Notifies the WDS when the purchase is delivered to WDD Administration office, and Arranges pick-up date with the WDS. 						
8	<p>WDS:</p> <table border="1" data-bbox="298 1226 1458 1682"> <thead> <tr> <th data-bbox="298 1226 558 1295">If the supportive service is for...</th> <th data-bbox="558 1226 1458 1295">Then WDS ...</th> </tr> </thead> <tbody> <tr> <td data-bbox="298 1295 558 1360">A bill,</td> <td data-bbox="558 1295 1458 1360">Contacts the customer via phone call, text, or email to inform him/her the utility/rent or childcare bill has been paid.</td> </tr> <tr> <td data-bbox="298 1360 558 1682">Goods and services,</td> <td data-bbox="558 1360 1458 1682"> <ul style="list-style-type: none"> Picks up the purchased goods and services from Administration Office, Contacts the customer via phone call, text, or email to set up an appointment to meet at the AJCC or designated location to provide the goods and services, <ul style="list-style-type: none"> Some coordination with the supervisor/manager will have to take place when completing the issuance. Meets the customer on the designated day/time to deliver goods, </td> </tr> </tbody> </table>	If the supportive service is for...	Then WDS ...	A bill,	Contacts the customer via phone call, text, or email to inform him/her the utility/rent or childcare bill has been paid.	Goods and services,	<ul style="list-style-type: none"> Picks up the purchased goods and services from Administration Office, Contacts the customer via phone call, text, or email to set up an appointment to meet at the AJCC or designated location to provide the goods and services, <ul style="list-style-type: none"> Some coordination with the supervisor/manager will have to take place when completing the issuance. Meets the customer on the designated day/time to deliver goods,
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Continued on next page

WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals, Continued

Staff process for purchases, continued

Stage	Description	
8, Cont.	If the supportive service is for...	Then WDS ...
	Goods and services (continued),	<ul style="list-style-type: none"> • Obtains the customer’s signature on the appropriate documents before giving the goods and services to the customer, • Completes the regular process for CalJOBS and Fiscal requirements (i.e. upload documentation and/or forward documentation to Fiscal, and • Completes a detailed case note. <p>Note: Each AJCC has a designated WDT who received a Cal-Card to use for paying bills and purchasing goods and services during the closure of the AJCC.</p>

Case notes

AJCC staff must complete detailed case notes for any supportive services issued related to funds for underserved COVID-19 impacted customers.

Case notes should include, but are not limited to:

- Type of supportive service requested,
- Tier level eligibility,
- Income verification or the self-attestation (WDD Customer Statement form) regarding income,
- Approval information,
- Date request was submitted to the designated AJCC WDT for payment or purchase,
- Discussion with customer regarding coordinating payment or pick-up of good and services, and
- Informing the customer original signatures will be required after offices resume services.

Tracking log

Tracking of the supportive services issued under this grant is captured on the Supervisors/Managers current tracking log.

The Fiscal Unit will review the AJCCs tracking logs and on a monthly basis provide ADMIN (Assistant Director/Director) with an update on the dollar amount spent and remaining balance on this grant.

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WIOA Dislocated Worker Funds for Underserved COVID-19 Individuals, Continued

Reporting

The Fiscal Unit should submit completed expenditure reports to the State by the 20th of each month through CalJOBS, including reports with \$0.00 expenditures. The first month report is due May 20, 2020.

In addition to the monthly reports, the state requires a closeout and end-of-project report to be submitted as follows:

- Closeout due date for funds ending 6/30/2020 are due 7/30/2020,
- Closeout due date for funds ending 9/30/2020 are due 11/25/2020, and
- End of project due date is 12/31/2020.

Notes:

- If a due date falls on a weekend or holiday, the report is due the last business day prior to the due date.
 - For the purposes of this grant, supportive services should only be charged to line item: **Other (Program)**.
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