WORKFORCE INVESTMENT BOARD OF TULARE COUNTY WORKFORCE INNOVATION AND OPPORTUNITY ACT TITLE 1	DATE: March 2, 2023
	SUBJECT: Guidance on Remote Service Delivery of WIOA Title I Career and Youth Services

WIB POLICY MEMORANDUM **TUL PM 23-02**

To: WIB WIOA Title I Subrecipients
  WIB Staff

Subject: Guidance on Remote Service Delivery of WIOA Title I Career and Youth Services

This memo provides guidance on the provision of virtual services for WIOA Title I Eligibility, Youth, Career, and Training Services. On March 31, 2020, and July 23, 2020, the Workforce Investment Board of Tulare County (WIB) established temporary guidance to prioritize virtual services to assist individuals who had an urgent and immediate need for enrollment during the COVID-19 pandemic. This memorandum supersedes the guidance titled *Maximizing Distance Technology for WIOA Title I Registration,* dated March 31, 2020, and guidance titled *Activities and Service Delivery for Remote Services,* dated July 23, 2020.

Over the past three years, we have found innovative ways to accommodate customers through the pandemic and provided a customer-centered approach to service delivery. The use of technology has allowed us to expand services and reach customers during shelter-in-place mandates. We will continue to use best practices to streamline the use of virtual activities to provide meaningful and engaging services to our community.

Definition of Remote Services
For the purpose of this policy, remote service involves the exchange of information through a virtual platform such as Zoom, Google Meet, Teams, or other platforms. Remote services should be meaningful, engaging, and equivalent to receiving in-person services.

Customer Focused Service Delivery
All aspects of service delivery must be designed with the needs and interests of customers in mind. Customers may access WIOA Title I program services remotely or in person based on their preferences or needs. In addition, when in-person or remote services are not viable for WIOA Title I customers due to lack of transportation or technology, subrecipients must consider meeting customers "where they are at" by meeting at an alternative location. ***Reference PY***

Remote CalJOBS Eligibility Explorer Application

When conducting remote eligibility, refer to the attached *CalJOBS How to use the Eligibility Explorer Application* to assist customers in completing a pre-application and uploading eligibility documents remotely. Intake staff must protect customers' Personal Identifiable Information (PII); therefore, eligibility documents must be uploaded to CalJOBS through the Eligibility Explorer Application or schedule an in-person appointment to submit documents. Staff will enter a case note of the customer's request for a remote eligibility appointment.

Remote Electronic Signatures

The WIOA application enables individuals and staff to sign the CalJOBS program applications remotely. Refer to the attached *CalJOBS Remote Electronic Signature User Guide* to assist customers in signing the WIOA application remotely.

In addition, electronic applications may be used to obtain signatures for worksite agreements, timesheets, and other related documents.

Coordinated Enrollment

Upon completing the eligibility in person or remotely, customers shall have access to a career coach the same day for an initial assessment, objective assessment, and My Action Plan.

Remote Services for Youth and Adult Career Services

Subrecipients may offer remote services equivalent to receiving in-person services via engaging, interactive platforms (Zoom, Google Meet, Teams, etc.) for career services.

Access to remote Youth and Adult Career Services shall include, but is not limited to:

- Career services, coaching, and guidance
- Work readiness workshops
- Job fairs and industry-specific recruitment
- Business Engagement and outreach
- Signing work-based training documents and other types of documents via electronic applications

Access to remote workshops shall include, but is not limited to:

- Interviewing skills
- Career Exploration
- Resume development
- How to apply for jobs online and in-person
- Finance and budgeting

Evaluation of Remote Services

Subrecipients will regularly evaluate the effectiveness of remote services by collecting customer satisfaction surveys. The customers' evaluations will assist the Employment Connection staff in continually improving and refine remote service delivery.

TeleSupport Services vs. Remote Services

Subrecipients may offer customer support over the telephone, although telesupport should not be relied upon as the sole source of an engagement or career services. Acceptable examples of telesupport services to customers include:

- Providing new job leads or program updates
- Reengaging customers or checking-in
- Following up with customers enrolled in a training program
- Mandatory program follow-ups

Please direct questions regarding this memo to Mary Rodarte, Workforce Services Program Manager, at mrodarte@tularewib.org.

Thank you,

Adam Peck
Executive Director

AP:mr:llg

Attachments

1. CalJOBS Help Sheet – How to use the Eligibility Explorer Application Manual
2. CalJOBS How to use the Eligibility Explorer Application User Guide
3. CalJOBS Remote Electronic Signature Guide

E:\Analyst-Program\Directives\1. Local Policy Memos\Memo Guidance Virtual Delivery of WIOA Title I Career and Youth Services\3.2.23 Memo Guidance on Remote Service Delivery of Title I Career and Youth Services.docx

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CalJOBS User Guide

How to use the Eligibility Explorer Application (WIOA Pre-application)

How to use the Eligibility Explorer Guide (WIOA Pre-Application)

This guide will outline how a registered individual can access and create an Eligibility Explorer Guide (WIOA pre-application) in CalJOBS, as well as how an WIOA Title I Adult and Youth staff member can convert the pre-application into a formal WIOA application.

The Eligibility Explorer Guide allows individuals to answer basic questions related to the WIOA application and upload documents without having to physically be present. A career coach or case manager can then convert the pre-application and complete the enrollment with the documents supplied by the individual.

How an Individual Creates a WIOA Pre-Application

To create a pre-application, the individual must first register in CalJOBS. Once they have registered, they can follow the steps below.

As an Individual:

1. Log into the system by going to *www.employmentconnect.org* using your internet browser. The website works best with Google Chrome.

2. Click "**Sign In**" to enter the login page. Enter your '**User Name**' and '**Password**' and complete the **reCaptcha** before clicking "**Sign in**".

3. Once you're logged in, on the left navigation **Menu >** access **Quick Menu > My Portfolio > My Individual Plan > Benefits Plan Profile.**
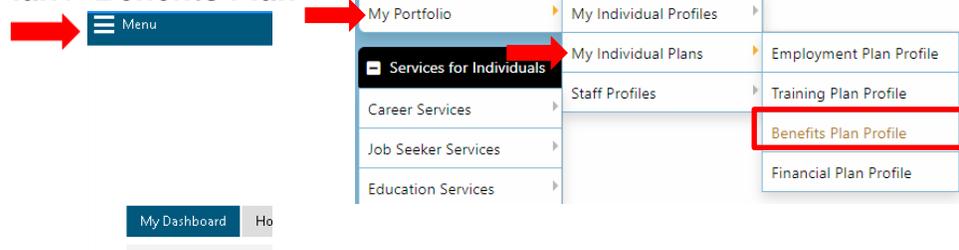
4. Navigate to the bottom of the following page and click the **Eligibility Explorer Application** link.

Fill out the **Eligibility Explorer Application** to determine if you may be eligible for the program.

5. On the following Eligibility Explorer **Intro** page, there are **Available Programs** listed with Program cards that describe a program that you may be eligible for.
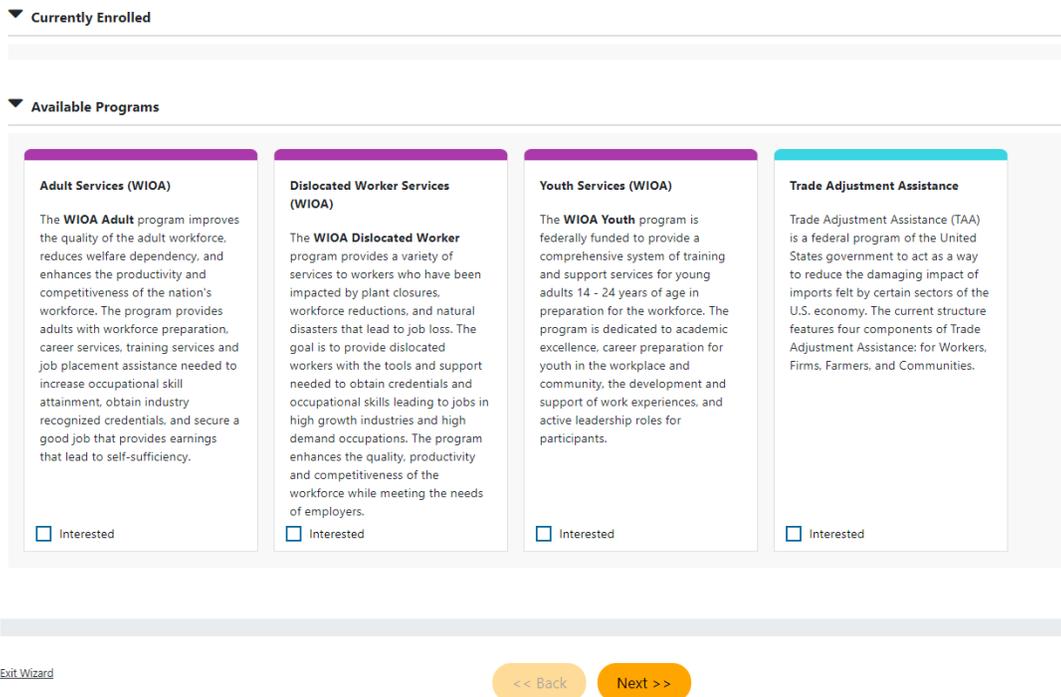
Check the box next to "**Interested**" under each WIOA program that you would like to apply for and click "**Next**" to continue.

6. Confirm that the information pre-populated from your registration is correct in all the tabs of the pre-application and enter any required information if needed.

You will see that the Eligibility Explorer application has 12 tabs in total:

1. Intro (the Available Programs page you just completed)
2. Contact
3. Demographic
4. Education
5. Farmworker
6. Employment
7. Public Assistance
8. Factors
9. Household And Income
10. Veteran
11. Documents
12. Eligibility Review

Confirm, update or add the required information in the **Contact, Demographic, Education, Farmworker, Employment, Public Assistance, Factors, Household And Income,** and **Veteran** tabs. If you did not enter information for those areas in registration, there may be no information displayed. You may simply click the orange "**Next**" button to save and continue.

Uploading Documents

One of the key features of the WIOA Pre-application is the ability to upload documents, to assist case managers with determining your WIOA eligibility.

In the **Docs** tab, a **Documentation Required** list will be displayed.

1. Under the **Action** column on the right, click on the **Upload** link to upload a document that fulfills the requirement.

Eligibility Explorer

Veteran	Documents	Eligibility Review
✅	⬤	✖

Intro	Contact	Demographic
Education	Farmworker	Employment
Public Assistance	Factors	Household And Income
Veteran	Documents	Eligibility Review

▲ **Hide All Steps**

Lee, Michelle

👤 Individual Detail | Case Notes | Comments | ⬇ To Bottom

Documents

You are missing documentation required for eligibility. Please upload the necessary files listed. If you are unable to upload your documents, you may skip this step and bring them when you meet with staff.

Documentation Required	Uploaded?	Action
Social Security Documentation	❌	Upload
Address Documentation	❌	Upload
Citizenship Documentation	❌	Upload
Education Level Documentation	❌	Upload
Education Status Documentation	❌	Upload
Family Size Documentation	❌	Upload
Date of Birth Documentation	❌	Upload

Exit Wizard

<< Back | Next >>

2. In the pop-up page that appears, select the type of document you are uploading.

Please select the type of document you are uploading. Then click the "Browse" or "Choose File" button to select a file for upload:

○ DD-214 Report of Transfer of discharge

○ Employment Records

○ IRS Form Letter 1722

○ Letter from Social Service Agency

○ Unemployment Wages Records

◉ Social Security Benefits

○ Social Security Card

○ W-2 Form

○ Letter/Printout from Social Security Office

○ Public Assistance Record/Printout

○ Agency Award Letter

○ Unemployment Wage Records

3. Click "**Select File**" to browse your computer for the appropriate document and then click "**Upload File**" to upload the file.

4. If successful, the file will display as uploaded.

File Name	Upload Date	Action
test_doc.txt	6/24/2021 5:08:59 PM	Delete
		Select File	Upload File

5. Click the yellow **Close** button to close the dialog box and the corresponding document should now show a green check mark under the **Uploaded?** column.

Documentation Required	Uploaded?	Action
Social Security Documentation	✓	Upload
Address Documentation	✗	Upload
Citizenship Documentation	✗	Upload
Education Level Documentation	✗	Upload
Education Status Documentation	✗	Upload
Family Size Documentation	✗	Upload
Date of Birth Documentation	✗	Upload

6. You do NOT have to upload a document for every documentation required in order to complete the Eligibility Explorer. **If you do not have the documents with you at the time of completing this application, you may skip this step and bring them when you meet with staff. However, uploading as many of the required documents as possible will assist case managers in determining your eligibility and will prevent you from having to bring any of the documents to an AJCC.**

7. Once you are finished uploading documents, click the orange "**Next**" button at the bottom and you will be taken to the final **Eligibility Review** tab.

   Here, you can view for which programs you may be eligible for, and the list of contact information for the closest office locations in your area.

8. Click "**Finish**" to save your application. Your Eligibility Explorer application will now be available to the workforce development area that corresponds to the address you entered.

9. Contact the nearest AJCC listed on this page and let them know that you have completed a WIOA Pre-Application and a case manager will contact you.

Converting an Eligibility Explorer Guide

Once an individual creates an Eligibility Explorer application, a case manager can access the individual's record to convert and complete the WIOA application. The information entered by the individual upon registration and through the pre-app will be available, along with any documents the individual uploaded.

Please note that an Eligibility Explorer application can only be converted if there is NO ACTIVE WIOA application for the participant in the same workforce area.

How to Convert an Eligibility Explorer Application: Staff Instructions

1. Log in to CalJOBS and access the individual's record by going to **Services for Workforce Staff > Manage an Individual > Assist an Individual.**

2. Once you've accessed the individual's case file, access **Staff Profiles > Case Management Profiles > Programs.**

3. Under the **Eligibility Explorer Application** section with the black banner, click the **Convert Application** link.

4. Check the programs to use the existing Eligibility Explorer Application data to pre-populate and create a program application.

5. Click on "**Create Applications**" after selecting the programs to create the application. The WIOA application should automatically be created as **Incomplete** in the Title I – Workforce Development (WIOA) section of the individual's programs tab.

Title I - Workforce Development (WIOA)				Apps: 1

Create Title I - Workforce Development (WIOA) Application

WIOA #2248358 - Incomplete

LWDB:	13 - Los Angeles County WDACS	Application Date	06/24/2021
Onestop:	2703 - LAO Community and Senior Services	Participation Date:	N/A
Open/Total Activities:	0 / 0	Closure Date:	N/A
		Exit Date:	N/A
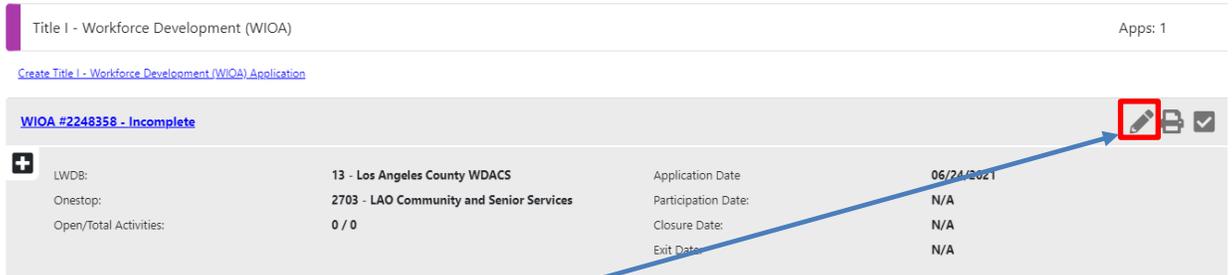
6. Click the top right pencil icon to finish completing the WIOA application. The first tab of the converted WIOA application will appear and you can proceed with completing the WIOA application as normal.

7. Documents that were uploaded by the participant during pre-application should already verified and noted within the WIOA application, but you can also view, access and link any of those documents by going to **Staff Profiles > General Profile > Documents (Staff).**
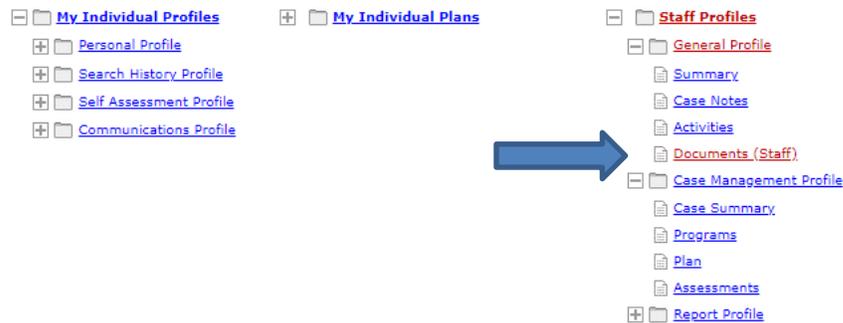
CalJOBS^{SM} WIOA Pre-Application

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I.   WIOA Pre-Application Description

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Job seekers who may be eligible for *Workforce Innovation and Opportunity Act* (WIOA) services can start a WIOA Pre-Application in the CalJOBS system after registration, and check their WIOA eligibility at any time. CalJOBS will allow individuals to create a "self-service" WIOA Pre-Application after they have registered in the system. The WIOA Pre-Application wizard that is launched helps individuals to determine if they are qualified for services under WIOA and provides the ability to provide WIOA information and verification documents before contacting AJCC staff for case management assistance. This will improve efficiency of in person services, as well as virtual services and saves time for both the job seeker and one-stop staff.

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II.   Individual: Creating a WIOA Pre-App

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Create WIOA Pre-Application

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Click on the **"Create WIOA Pre-Application"** link within the "My Benefits Plan" widget on your dashboard.

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WIOA Pre-Application – Start Page

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Review the information on the WIOA Pre-Application start page, and click **Next** to start the WIOA Pre-Application.

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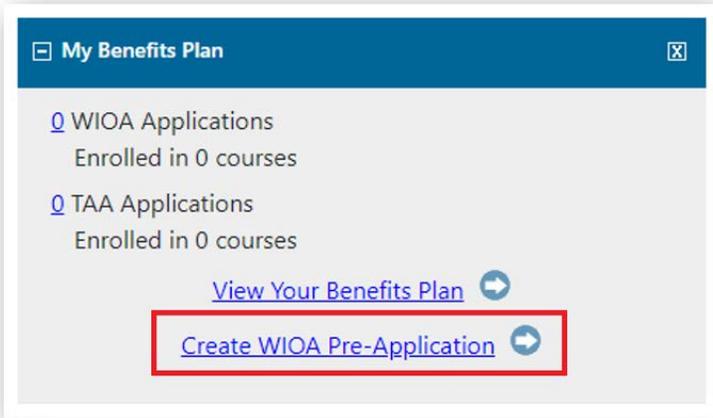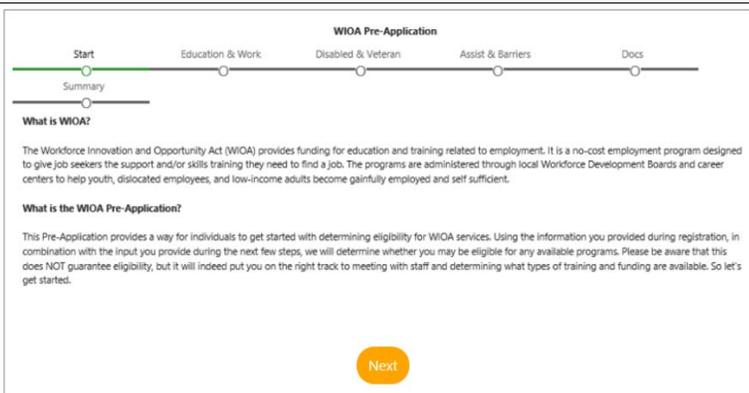
3

 WIOA Pre-Application – Education & Work Page	**Education & Work** Populate the required fields under "Your Education" & "Your Employment" and click Next.

WIOA Pre-Application – Disabled & Veteran Page
	Disabled & Veteran
	    a. **Disabled and/or Military Experience -** If you stated that you have a disability or have military experience in your registration, this information will appear on the "Disabled and Veteran" page. Make sure that the information is correct and click **Next**.
	
	    b. **Not Disabled and/or No Military Experience -** If you stated that you do not have a disability or do not have military experience in your registration, you will be presented with the page shown to the left. Once you have completed reading the information on this screen, click **Next**.

WIOA Pre-Application – Assist & Barriers Page

Assist & Barriers
Populate the required fields under "Your Income", "Public Assistance" & "Individual Barriers" and click **Next**.

WIOA Pre-Application – Docs Page

Docs (Optional)
This section is optional. Click on **Upload** next to associated "Documentation Required" to upload an image or document for the chosen option.

Citizenship Documentation

View the documents you have uploaded for the selected category. To upload more documents click the browse/choose file button to locate a file on your computer. Then click "Upload" to send your file.

Please select the type of document you are uploading. Then click the "Browse" or "Choose File" button to select a file for upload:

○ Alien Registration Card (USCIS Forms I-151, I-551, I-94, I-668A, I-197, I-179)

○ Baptismal Certificate with Place of Birth

● Birth Certificate

○ DD-214

○ Food Stamp Records

○ Foreign Passport Stamped Eligible to Work

○ Hospital Birth Record

○ Naturalization Certification

○ Public Assistance Records

○ United States Passport

○ Native American Tribal Document

○ Alien Registration Card Indication right to work

○ Voter Registration Card

File Name	Upload Date	Action
No Files Uploaded		

Choose File   Birth Cert.PNG   Upload File

WIOA Pre-Application – Docs Upload Page

Type of Document (Optional)

Select the type of document you are uploading. Then click the **Choose File** button to select a file for upload. Finally, click the **Upload File** button to upload the file.

WIOA Pre-Application

Start   Education & Work   Disabled & Veteran   Assist & Barriers   Docs   Summary

You are missing documentation required for eligibility. Please upload the necessary files listed. If you are unable to upload your documents, you may skip this step and bring them when you meet with staff.

Documentation Required	Uploaded?	Action
Social Security Documentation	⊗	Upload
Address Documentation	⊗	Upload
Citizenship Documentation	✓	Upload
Education Level Documentation	⊗	Upload
Education Status Documentation	⊗	Upload
Homeless Documentation	⊗	Upload
Selective Service (Draft Status) Documentation	⊗	Upload
Temporary Assistance for Needy Families (TANF) Documentation	⊗	Upload
Date of Birth Documentation	⊗	Upload

Back   Next

WIOA Pre-Application – Docs Page

Click **Next** on the Docs page to continue to the final page of the WIOA Pre-Application.
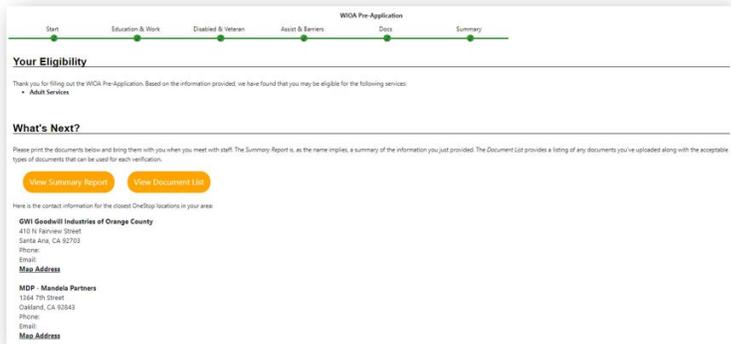
WIOA Pre-Application – Summary Page

Once you have completed the questions and uploaded any related documents, your preliminary eligibility information will display at the top Summary screen.

From the summary screen, you can view a summary report by clicking on **View Summary Report**.

You can also view a list of any uploaded documents by clicking on **View Documents List**.

You can also print these summaries if needed.

This screen also displays the contact information for the nearest one-stop office(s).

The final step is to submit the WIOA pre-application by clicking on **Finish**.

III.   Staff: Viewing / Approving WIOA Pre-Applications Via the Navigation Menu
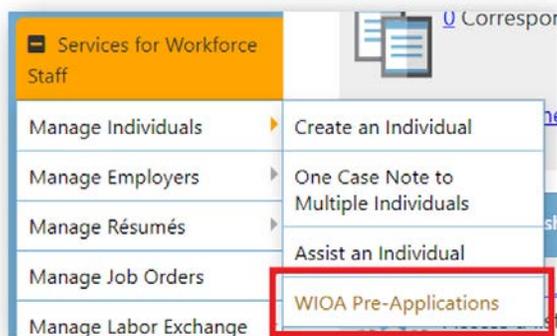
Manage Individuals > WIOA Pre-Applications

Go to **Manage Individuals** under "Services for Workforce Staff" from the navigation menu on the left side, and click **WIOA Pre-Applications.**

 WIOA Pre-Application (Listed by LWIA and or Office/OneStop)	(Optional) Select the appropriate search criteria and click **Filter**. (Optional) You can see a summary of the individual's WIOA Pre-Application by clicking **Summary** or delete the WIOA Pre-Application by clicking on **Delete**. From the display of pre-applications, click **Approve** under "Action" for the associated username that you would like to approve.
 Convert Application Button	Review the WIOA information screen and populate the required fields, and then click **Convert Application** to convert the WIOA Pre-Application in a traditional Title I application.
 WIOA Wizard Progress Bar	Once the application has been converted, complete the Title I application as you normally would.

IV.	**Staff: Viewing / Approving WIOA Pre-Applications Via the Programs Tab**
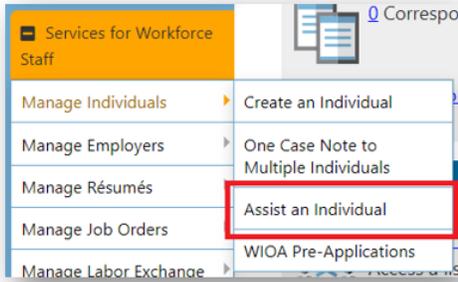
\n\n*Assist An Individual*	Go to **Manage Individuals** under "Services for Workforce Staff" from the navigation menu on the left side and then click **Assist an Individual.**
\n\n*Assist An Individual Search Criteria*	Input the appropriate search criteria
\n\n*Assist An Individual Search*	Click on the blue **Search link** or scroll to the bottom and click the orange **Search button.**
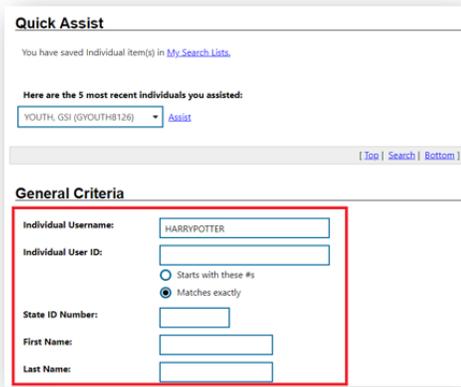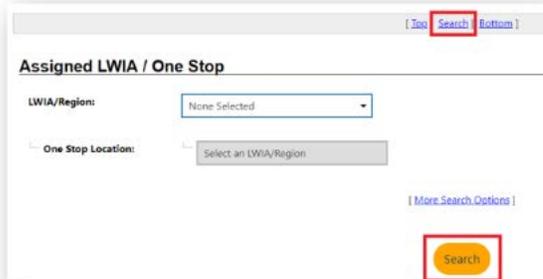
Assist An Individual Search Results

Click on the individual's user name to assist the individual.

Individual Navigation Lists

Navigate to the individual's Programs Tab by expanding the "Staff Profiles" list at the top of the page and clicking on **Programs** under "Case Management Profile."

WIOA Pre-Application Link on Programs Tab

Scroll down to Title I – Workforce Development (WIOA) or use the filters to only show Title I – Workforce Development (WIOA).

Click on **Convert WIOA Pre-Application** under Title I – Workforce Development (WIOA)

Convert Application Button	Review the WIOA information screen and populate the required fields. Click **Convert Application** to convert the application
WIOA Wizard Progress Bar	Once the conversion has been completed, complete the WIOA application as you normally would.

CalJOBS^{SM} Remote Electronic Signature

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I.	**Locating the Signature Section**	

Manage Individuals ▸ Create an Individual One Case Note to Multiple Individuals Assist an Individual WIOA Pre-Applications Manage Employers ▸ Manage Résumés ▸ Manage Job Orders ▸ Manage Labor Exchange ▸	Start the normal process of assisting an individual. Manage Individuals > Assist an Individual
Individual Detailed　　　　　　　　　　**Action** User Name: User ID:　　　　　created on 09/22/2016 Individual Name: SSN (last 4 digits):　　2009 Date of Birth:　　03/23/1972 - Age: 48 State ID: Summary Tab Case Notes Tab Activities Tab Programs Tab Reset	Go to the programs tab of the searched individual
Title I - Workforce Development (WIOA) Create Title I - Workforce Development (WIOA) Application Convert WIOA Pre-Application	Select the federal program you wish to enroll the individual in: Title III Wagner-Peyser, Title I WIOA, Trade Adjustment Act (TAA), and National Farmworkers Job Program
Title I - Workforce Development (WIOA) Create Title I - Workforce Development (WIOA) Application Convert WIOA Pre-Application	Go through the application process until you get to the signature piece

II.   Using the Remote Electronic Signature

	The application signature section of the federal program applications will initially look like this with no signatures
	When staff click the Staff Signature/Capture Signature link, they will get these 2 options: Mouse and Message. Staff will use the mouse for their signature and message to obtain the applicant signature.
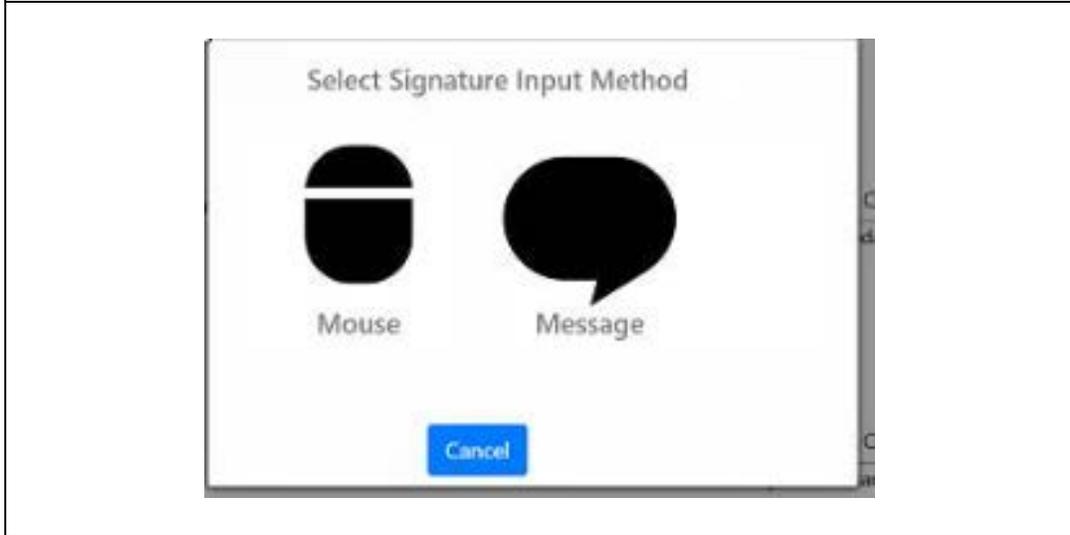
CERTIFICATION OF UNDERSTANDING: I understand, acknowledge, agree and certify that: • I accept my responsibilities in the use of electronic signatures as described on this form. • My execution of an electronic signature performed on this system is the legally binding equivalent of my traditional handwritten signature, and I am accountable and responsible for actions performed under such an electronic signature • I may not share components of my electronic signature such that my signature could be executed by another individual. Such components may include, but are not limited to, computer passwords and/or unique identification tokens. Apply Clear Cancel	If staff select Mouse, they will see this screen where they can use their mouse to create a signature.
Signature Applicant Signature: _____ ✍ Capture Signature Staff Signature: _____ *B Dossey* _____ ✍ Capture Signature bonnie dassing WIOA #160382453	Application will look like this once the mouse is used and signature applied.
Send Text Send Email Cancel	When staff click the Applicant Signature/Capture Signature link, they will see the same 2 options. When applicants are not in the offices, staff will select message, so that they can either text or email a link to the applicant.

5

Please select your preferred method of signing this document, using any of the e-signature methods constitutes a legal signature confirming that you acknowledge and warrant the truthfulness of the information provided in this document.	Applicants will get a link via text or email. When clicked, this link will bring them to a page in the system with their signature options and a link to view the application PDF. For the early rollout, we will only have the Mouse signature method available. We will add other options as they become available.
Signature Applicant Signature: _____ *Allyson* Capture Signature Herbert, Yolanda WIOA #163215514 Staff Signature: _____ *Allyson* Capture Signature Allyson Guzman WIOA #163215514	Completed applications will look like this for staff. Individuals will get confirmation in the CalJOBS message center that the application was signed.