

WORKFORCE DEVELOPMENT DEPARTMENT

AJCC Desk Manual

Office Assistants

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Section 1

Office Assistant Responsibilities

Overview

Introduction

The Office Assistant (OA) position in the Workforce Development Department provides clerical support to staff providing services at the America's Job Centers of California (AJCCs). The OA is the first person a customer or visitor sees when he/she go to an AJCC office. The OA:

- Fosters excellent customer service with all interaction with customers of the AJCC.
 - Provides support to the Workforce Development Manager, the Supervisor, and other Workforce Development staff.
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General Duties

Introduction	This section provides information on the general duties the Office Assistants complete at the America's Job Center of California (AJCC).
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Duties	The Office Assistants duties may include but are not limited to the following:
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- Answering customer inquiries and/or make referrals to:
 - Workshops,
 - Veterans' services, and
 - Other services.
- Scheduling Intake appointments for the Workforce Development Technician (WDT)
- Providing general information to the public
- Ordering, storing, and distributing office supplies and printed materials
- Mail processing and distribution
- Maintaining the county vehicle log
- Checks in participants for Comprehensive Adult Student Assessment Systems (CASAS) test and any scheduled appointments with advisor
- Assist with Job Fairs
- Perform clerical work in support of department staff
- Post and maintain job openings on bulletin board and reception counter
- Reviewing Workforce Innovation & Opportunity Act (WIOA) applications

Note: In some of the AJCC offices, the OA assists customers in the resource room with equipment (fax, scanner, copy machines, etc.) and/or is the back-up for Work Experience (WEX) worker or Employment Development Department (EDD) staff.

Additional duties	Some additional duties completed by the OA but is unique to the AJCC office are:
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- Turns on all the computers in the resource room
- Checks if customer is registered in CalJOBS and if not, sets them up in the resource room to register
- Reviews the ITA invoices, scan them into CalJOBS, case note in CalJOBS, and forwards the invoices to the appropriate WDS
- Hands out customer check-in cards to complete rather than using Kiosk
- Enters customer into the VOS Greeter
- Screens the participant and attaches the dislocated worker form and emails the form and information to the WDT and rotates the Intake Process assignment based on the next available WDT (paper control log).

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General Duties, Continued

Additional duties, continued

- New customer:
 - Comes in as a walk-in, the OA hands the customer complete a form (created by the OA) regarding basic questions. Based on response schedules an appointment with the WDT after customer completes registration in CalJOBS
 - Calls, sends them the customer questionnaire, income worksheet (only as a tool for the OA, not saved in CalJOBS) and enrollment forms for customer to complete
 - Requests to speak to someone today, the OA reaches out to the Duty Worker to assist the customer
 - Logs into CalJOBS and links the KIOSK to CalJOBS and has it set-up for customers to access
 - Checks in all customers with the KIOSK before going to the receptionist
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Office Support

Introduction

The Office Assistants (OA) provide office support to the America's Job Center of California (AJCC) with:

- Customer service,
 - Order supplies, and/or
 - Community outreach.
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Customer service

The OA may provide customer service assistance as follows:

- Assist customers and answering questions
 - Review Workforce Innovation and Opportunity Act (WIOA) applications to ensure form is complete if paper document is used
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Supplies

The OAs are in charge of ordering office supplies for the AJCC. The OA's duties include:

- Store and distribute office supplies
 - Keep a record of supply orders and distribution
 - Compare bills and invoices against purchase orders
 - Confer with vendors as needed
 - Generate supply orders
-

Community outreach

In some situations, the OAs may be assigned to attend and participate in:

- Committee meetings,
 - Job fairs, and
 - Specialized support groups.
-

Resource Room

Introduction

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

Resource Room

Resource room staff members may:

- Schedule customers to attend informational workshops and enter appropriate case notes,
 - Assist customers with system registration in CalJOBS,
 - Advise management when computer equipment/software issues occur to ensure computers are available to customers during office hours,
 - Assist resource room customers with equipment (fax, scanner, copy machines, etc.) and answer inquiries,
 - Provide general information, instructions and assistance regarding Workforce Innovation and Opportunity Act (WIOA) programs and services to the public,
 - Direct customers efficiently to his/her destination,
 - Check- in customers for workshops,
 - Notify Advisors of customer arrival for appointment via E-mail, phone, or VOS Greeter,
 - Monitor customer time on the computers to ensure equipment is used properly and customers are rotating if resource room is crowded,
 - Maintain copier/printer/fax machine paper level,
 - Assist in the training of other staff members as needed, and
 - Maintain copies of office forms needed (registration logs, resource room logs, workshop logs, registration slips, password reset slips, workshop appointment slips, CalJOBS slips, etc.).
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Resource Room equipment

The resource room is designed to provide equipment and software that a job seeker needs for an effective job search, including:

- Personal computers
 - Printers
 - Fax machines
 - Telephones
 - Scanners
 - Internet access
 - Library of print materials including books, periodicals, and directories
 - Resume paper
 - Typing tutorial software
 - Resume assistant software
 - Assistive Technology
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Closed Files

Introduction

Customers who have exited the Workforce Innovation and Opportunity Act (WIOA) program and all required Follow-up services has been completed, the case is sent to closed files.

Preparing files for on-site storage

Closed files are maintained on-site at the America's Job Center of California (AJCC) for three (3) years. To prepare files for on-site storage the Office Assistant (OA) completes the following:

Step	Action
1	Transfer file contents to a manila folder.
2	Verify closure date in CalJOBS.
3	Verify Workforce Development Specialist (WDS) case note regarding case being sent to closed files is completed.
4	Label folder with last name, first name, last 4 of social security number (SSN) and exit date.
5	Complete case note indicating file stored on-site, include exit date, in customers case file.
6	File alphabetically by date in storage location.

Preparing files for off-site storage

After three (3) years of on-site storage, files are sent off-site to the Central Closed files in San Bernardino where the files are stored until destruction date. To prepare files for shipment to Central Closed files, the OA completes the following:

Step	Action
1	Box case files in alphabetical order.
2	Enter case note indicating case is being sent to Central Closed Files (include box # and destruction year)
3	Create an Inventory Log / Transmittal with the following information: <ul style="list-style-type: none">• Case names• Case numbers• Year case closed• Box number
4	<ul style="list-style-type: none">• Place a copy of the log in the box, and• Save a copy for office record
5	<ul style="list-style-type: none">• Attach a "carton contents" label to the front and back of box, and• close the box with tape.
6	Contact Central Closed Files for pick up

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Closed Files, Continued

Requesting files from off- site storage

When files have been sent to Central Closed Files and files are needed for audit or other purposes, the following steps are taken to retrieve the file:

Step	Action
1	Confirm request from WDS for closed file retrieval contains: <ul style="list-style-type: none">• Customer's full name,• Last 4 of SSN,• Box #, and• Exit date.
2	E-mail requested file retrieval information to "Central Closed Files".
3	<ul style="list-style-type: none">• Forward file to WDS when file is received from Central Closed Files, and• Enter case note

Section 2

Receptionist

Overview

Introduction

The first impression of the America's Job Center of California (AJCC) begins at the front desk; services provided there are invaluable to customers of the Workforce Development Department (WDD). As an extension of the front desk, the resource room is equally important.

America's Job Center of California (AJCC) Reception/Front Desk staff will follow the procedures outlined in this chapter regarding customers and/or visitors who come to the AJCC for services/visits. Reception/Front Desk policy includes the following:

- Customer check-in card,
 - Visitor Sign-in log,
 - Conflict/Resolution, and
 - Lost and forgotten badge.
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General Guidelines

Introduction	This section provides general guidelines when dealing with the customers when he/she first enters the America's Job Center of California (AJCC).
First impressions	<p>Creating a comfortable atmosphere at the front desk and in the resource room may seem even more challenging than providing excellent customer service. The following are simple rules to remember and apply:</p> <ul style="list-style-type: none">• Create an open and welcoming environment. The first impression of the AJCC, the Department and the Program begins at the reception desk or on the reception phone.• View things from the customer's perspective; smiles and acknowledgment set the tone.• The reception and resource room staff areas should be pleasing. Think about sight, smell, and sound.• Maintain a professional workstation free of food, drinks, and cell phones.• Staff should maintain a pleasant and positive outlook.• Be solution-oriented if there is a problem or a concern.• Find someone to assist with any difficult questions that arise (such as duty Workforce Development Specialist (WDS), Supervisor and/or Manager).
Guidelines	<p>Front Desk/Reception and Resource Room Staff should...</p> <ul style="list-style-type: none">• Dress appropriately; look neat, professional, and presentable. Always practice good personal hygiene and modesty.• Have resource phone numbers handy (i.e., co-workers, employers, contractors, vendors, community resources, emergency contact numbers, Employment Development Department (EDD) numbers etc.).• Be courteous and respectful with a positive attitude; smile.• Leave personal matters at home.• Keep small talk with visitors to a minimum so it doesn't interfere with phone calls or other duties.• Diffuse difficult situations by being an active listener and keeping calm. Speak clearly, without raising your voice and ask for assistance as needed.• Give good directions and thoroughly explain next steps or processes• Acknowledge customers with pleasant greetings when they arrive.• Always get a first, last name, and name of the organization before calling the staff member.• Relay staff member instructions, inform the visitor of next steps (i.e., "Mr. Smith will be with you shortly; please have a seat").• Answer the phone politely and with standard greeting, identify your AJCC. Make sure the phone is answered on the first or second ring and keep hold time brief• Direct calls politely with a standard phrase such as "One moment please or I will transfer you now." Politely thank the caller and direct the call accordingly• Prepare needed materials prior to opening office

Customer/Visitor Sign-in

Introduction	<p>This section provides information about the customer check-in card and visitor sign-in log.</p>
Customer check-in card	<p>Customers visiting the America's Job Center of California (AJCC) complete a check-in card for staff to determine the purpose for the customer's visit, if the KIOSK is not used. Customers do not need to sign-in on the Visitor Log. The card is used for:</p> <ul style="list-style-type: none">• New customers applying for Workforce Innovation and Opportunity Act (WIOA) services,• Safety and security purposes,• Identifying customers who are already enrolled and need to utilize the AJCC for WIOA services,• Determining if a customer is here to attend a workshop, and/or• Determining if the customer has an appointment with an Advisor.
Visitor Sign-In log	<p>Each AJCC must have a log for visitors to sign in/out for each day. The log is used:</p> <ul style="list-style-type: none">• To identify the number of visitors visiting the AJCCs,• To determine the purpose for the visit (i.e., Employer visit, tour of the AJCC etc.), and• For safety and security purposes. <p>Visitors can consist of one (1) of the following individuals, but not limited to:</p> <ul style="list-style-type: none">• Workforce Development Department (WDD) staff who is visiting another AJCC, including administrative staff,• Business representative or Employer,• Community Based Organization (CBO) representative,• Outside partner,• Visitors for co-located partners, and/or• College representative. <p>Note: Customers visiting the AJCC to utilize the services is not considered a visitor and is not required to sign-in or check out on the visitor log.</p>
Exceptions	<p>WDD Administrative staff and/or partners with badge to access an AJCC office is not required to sign-in or check out on the visitor's log.</p>

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Customer/Visitor Sign-in, Continued

Process The table below outlines the procedures the Reception/Front Desk staff will follow when a customer or visitor enters the AJCC.

Step	Action										
1	<ul style="list-style-type: none"> Greet the customer/visitor with a smile, in a positive and courteous manner, and Ask if he/she served in the "United States Military". <p>Note: If the customer has served in the US Military, he/she has the option to see the Veteran Services Navigator to complete a screening to see if he/she meets the priority guidelines to see a Veteran Representative from EDD.</p>										
2	<p>Inquire the reason for the visit at the AJCC:</p> <table> <tr> <th>If the individual is here as a ...</th><th>Then ...</th></tr> <tr> <td>Customer,</td><td> <ul style="list-style-type: none"> Provide the check-in card for customer to complete, and Go to step 3. </td></tr> <tr> <td>Visitor,</td><td> <ul style="list-style-type: none"> Instruct visitor to sign-in and check-out on the Visitor's Log, Provide him/her with a visitor's badge, Contact the person the visitor is wanting to meet with, or Escort visitor to contact person or conference room, if applicable. </td></tr> </table>	If the individual is here as a ...	Then ...	Customer,	<ul style="list-style-type: none"> Provide the check-in card for customer to complete, and Go to step 3. 	Visitor,	<ul style="list-style-type: none"> Instruct visitor to sign-in and check-out on the Visitor's Log, Provide him/her with a visitor's badge, Contact the person the visitor is wanting to meet with, or Escort visitor to contact person or conference room, if applicable. 				
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3	<p>Research customer in the CalJOBS to determine if he/she is a new or existing customer.</p> <table> <tr> <th>If the individual is ...</th><th>Then ...</th></tr> <tr> <td>A new customer,</td><td>Customer needs to register.</td></tr> <tr> <td>Here for a(n): <ul style="list-style-type: none"> Personalized Job Search Assistance (PJSA), or Reemployment Services and Eligibility Assessment (RESEA), or Other services, </td><td>Follow current process for assisting the customer.</td></tr> <tr> <td>Here for an appointment,</td><td>Contact the appropriate staff to notify him/her the customer is here for the appointment.</td></tr> <tr> <td>Here: <ul style="list-style-type: none"> To utilize the Resource room, or For a workshop, </td><td> <ul style="list-style-type: none"> Allow customer to enter the Resource room, or Instruct customer where to go for the workshop. </td></tr> </table>	If the individual is ...	Then ...	A new customer,	Customer needs to register.	Here for a(n): <ul style="list-style-type: none"> Personalized Job Search Assistance (PJSA), or Reemployment Services and Eligibility Assessment (RESEA), or Other services, 	Follow current process for assisting the customer.	Here for an appointment,	Contact the appropriate staff to notify him/her the customer is here for the appointment.	Here: <ul style="list-style-type: none"> To utilize the Resource room, or For a workshop, 	<ul style="list-style-type: none"> Allow customer to enter the Resource room, or Instruct customer where to go for the workshop.
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Note: Refer to the Conflict/Resolution section if any conflicts occur with a customer or visitor.

Lost or forgotten badge

The Receptionist/Front Desk staff will provide a visitor badge to staff when the badge is lost or forgotten. If the badge is not found the Supervisor or Manager will email the WDD Administration Office Assistant (OA) for replacement badge to be issued.

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Conflict/Resolution Process

Introduction

In certain situations, front desk receptionist area can encounter conflict between customers and America's Job Center of California (AJCC) staff. This section provides information regarding conflicts and resolutions to assist staff.

Conflict/ Resolution

Situations where a conflict may arise between staff and a customer may require staff to seek a resolution by contacting the Supervisor or designated In-charge person, or Manager for assistance.

Example:

- Customer refused to complete the check-in card; however, would like to utilize the resources available at the center even after the Reception/Front Desk staff provided explanation.
- Customer still refuses to follow Reception/Front Desk procedures.
- Reception/Front Desk staff should follow chain of command for a resolution. Chain of command should be:
 - Supervisor, or
 - Designated In-charge person, and/or
 - Manager.

Customer who do not receive services or refuse to follow office procedures the Reception/Front Desk Staff or management will provide a resource list, if available, to assist the customer with his/her needs.

Kiosk/VOS Greeter

Introduction	<p>The CalJOBS VOS Greeter is a virtual check-in system. The VOS Greeter is designed to assist America's Job Center of California (AJCC) staff with recording visitor traffic electronically in-lieu of a paper sign-in sheet. The VOS Greeter allows AJCC to track the number of individuals visiting an AJCC, and the purpose of his/her visit.</p> <p>Reference: Workforce Services Directive (WSD) 17-09.</p>
VOS Greeter	<p>All customers who wish to receive services through the AJCC, he/she must check-in through the VOS Greeter. In cases where the customer did not check in through the VOS Greeter at the front desk, the Workforce Development Specialist (WDS) will enter the check-in in CalJOBS.</p> <p>The VOS Greeter is not a replacement for entering services or activity codes into the individual's account within CalJOBS. Staff will need to enter activity codes for services provided in the appropriate Title I or Title III program applications.</p>
Kiosk	<p>The Kiosk is a dedicated computer located at the front of the office. The Kiosk displays a welcome screen and asks for the visitor's identification information. Once their information is entered, the Local-level Visit Reasons configured for that office will display for selection.</p> <p>Each AJCC logs into CalJOBS from the kiosk using the AJCC Kiosk Credentials specific to your office.</p>
Reports	<p>Reports are available to view the results of VOS Greeter. AJCC staff are able to log into CalJOBS under Detailed Reports to generate one or more of the following reports:</p> <ul style="list-style-type: none">• List of all visitors,• Summary by visit reason,• Visits by hour, and• Visits by weekday.
Kiosk/VOS Greeter guides	<p>CalJOBS Kiosk instructions and VOS Greeter user guide are located on the WDD Intranet>Resources>Quick Reference Guide tab.</p>