

WORKFORCE DEVELOPMENT DEPARTMENT

AJCC Desk Manual

Workforce Development Technician

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Section 1

Workforce Development Technician

Responsibilities

Overview

Introduction

The Workforce Development Technician (WDT) support the operations and goals of the Department by executing administrative and technical duties. The Workforce Development Technician may be assigned to various duties. The WDT:

- Fosters excellent customer service with all interaction with customers of the AJCC.
 - Provides support to the Workforce Development Manager, the Supervisors, and other Workforce Development staff.
 - Enters data into the Virtual One-Stop (VOS) system.
 - Assists with eligibility and intake of Workforce Innovation & Opportunity Act (WIOA) customers.
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General Duties

Introduction	<p>This section provides information on the general duties the Workforce Development Technician (WDT) completes at the America's Job Center of California (AJCC).</p>
Duties	<p>The WDTs duties may include but are not limited to the following:</p> <ul style="list-style-type: none">• Answering customer inquiries and/or make referrals to:<ul style="list-style-type: none">– Workshops,– Veterans' services, and– Other services.• Scheduling appointments for the Workforce Development Specialist (WDS)• Data entry (VOS Greeter, case notes, registrations)• Administers the CASAS test based on who the WDS signed up for testing• Daily transmittals to Fiscal (amendments, benchmarks, and Cal-card reconciliations)• Cal-Card purchases – meet participants at store or purchase items for participants and customer pick-ups at the office• Issues the supportive services to participants (804)• Completes the application in CalJOBS and enters appropriate activity codes• Sends the customer the enrollment forms via email; scan documents into CalJOBS once the customer returns the forms• Maintaining county vehicle log• Attend and participate in services committee meetings, job fairs, and to specialized support groups.
Additional duties	<p>The following is a list of additional duties a WDT may complete, but is not common with all three (3) AJCC offices:</p> <ul style="list-style-type: none">• Sends application to supervisor/manager for approval before assigning a WDS (process can take up to 1-3 days before getting assigned to a WDS)<ul style="list-style-type: none">– If application is rejected by supervisor/manager, he/she is responsible for contacting customer and notifying them of not being qualified and offer any other resources• Assigns the customer to a WDS based on rotation and is scheduled based on WDS calendar availability<ul style="list-style-type: none">– WDS has phone or in-person slots for scheduling• Assists with scheduling workshops for WDS when someone is absent• Updates KIOSK and VOS Greeter when customer is seen• Sees all walk-in customers for Intake process• Assists WDS with Follow-up services calls when needed

Intake Process

Introduction	The initial visit is critical to identifying a customer's needs, goals, barriers, and should serve as a foundation to a fruitful relationship. This section outlines the Intake process the Workforce Development Technician (WDT) completes with the customer after he/she registered in CalJOBS.
Intake Process	<p>At the initial appointment, the WDT completes an Intake process with the customer. The Intake process includes, but is not limited to the following:</p> <ul style="list-style-type: none">• Verify customer completed his/her registration in CalJOBS• Complete the online WIOA application in CalJOBS• Provide information about eligibility requirements• Determine if the customer who is between the ages of 18-26 will benefit for the Adult/Dislocated Worker Services or Youth Service.• Refer customer to a contracted Youth Provider for Youth Service, if applicable.• Obtain the necessary documentation to make a determination on the customer's eligibility, if applicable.• Identify possible employment barriers.• Assign a WDS for the customer.• Advise customer of services available.• Determine customer skill level.• Listen and respond to customer's concern regarding his/her employment needs in a positive manner.• Identify if customer would benefit from a partner service and make the appropriate referral.

Assessment

Introduction

Assessments provide valuable information to determine the skill level for a participant towards his/her training and/or employment goal. Assessments are given to the adult and dislocated worker population when a participant wants to enroll into training, and he/she does not have an associate degree or bachelor's degree.

Assessment

Customers receiving Workforce Innovation and Opportunity Act (WIOA) and/or Grant funding may be required to take an assessment. The Workforce Development Technician (WDT) will proctor the assessment testing. The WDT will complete the following steps:

Step	Action
1	Prepare room with required assessment materials and/or computer set-up for participants.
2	<ul style="list-style-type: none">• Take attendance, and• Verify participants Identification.
3	<ul style="list-style-type: none">• Proctor, and• Grade assessments.
4	<ul style="list-style-type: none">• Complete a case note regarding the participants score,• Upload the scores into CalJOBS under the assessment tab if customers score is below 8.9 grade level (Basic Skills Deficiency), and• Send the results to the WDS.

Note: Refer to the Program Guide Chapter 2 – WIOA Eligibility under Priority of Service section regarding Basic Skills Deficiency and entering information into CalJOBS.

Request for Services

Introduction

This section provides information on assisting the America's Job Center of California (AJCC) staff with requests for services such as:

- Gas cards,
- Reimbursements,
- Bus passes,
- Vouchers, and
- CalCard purchases.

Note: Refer to Chapter 3 – Supportive Services of the Program Guide for the allowable limits that can be issued to a customer.

Supportive Services

The Workforce Development Department (WDD) Supportive Services form (WDD 804 form) is used to request for supportive services for customers enrolled in the Workforce Innovation and Opportunity Act (WIOA) program to support customers on a case-by-case basis. The Workforce Development Specialist (WDS) completes the WDD 804 form, obtains supervisor approval, and forwards the WDD 804 form to the Workforce Development Technician (WDT) for issuance and processing the following:

- Reimbursements
- Gas cards
- Bus passes
- Vouchers
- CalCard purchases

The WDD 804 form is located on **WDD Intranet>Forms> Supportive Services tab**.

Reimbursement

In certain situations, a customer may submit a reimbursement claim for his/her travel expense. The WDT will complete the following steps for a customer reimbursement request.

Step	Action
1	Verify the following information on the WDD 804 form: <ul style="list-style-type: none">• Service level box,• Funding source,• Attachments match entries,• Period Covered, and• Signatures of the WDS and Supervisor.
2	Transfer information from WDD 804 form onto to the Daily Transmittal Sheet.
3	<ul style="list-style-type: none">• Obtain customers signature on form,• Make copies of documentation, and• File in designated cabinet.
4	Send information for payment to the Admin Fiscal Unit.
5	Complete a case note in the customers file in CalJOBS.

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Request for Services, Continued

Gas card issuance

To issue gas cards to a customer, the WDT will complete the following steps:

Step	Action
1	Verify the following sections are completed on Form 804 by WDS: <ul style="list-style-type: none">• Service Level box• Funding source• Period Covered• Signatures of the WDS and Supervisor
2	Remove the required number of cards from the safe/locked file cabinet.
3	Enter the following information on the Gas Card Control Log next to designated card number: <ul style="list-style-type: none">• Date issued,• Customer name,• Last 4 digits of social security number,• Adult, Dislocated, etc.,• Service Level,• Balance on hand,• WDS name and staff ID#, and• First initial and last name of support staff.
4	Enter the last 6 digits of the first card and the last 6 digits of the last card issued on the WDD 804 form, in the transportation section.
5	<ul style="list-style-type: none">• Issue the gas card(s), and• Obtain customers signature on the WDD 804 form to confirm receipt.
6	Sign and date on Issued By line.
7	<ul style="list-style-type: none">• Complete a case note and• Enters the appropriate Supportive Services activity code in the customers file in CalJOBS.
8	Give a copy of the WDD 804 form to the WDS for customer file and file original by month in designated file.

Bus pass issuance

The WDT, as the authorized card custodian completes the following steps to issue a bus pass to a customer.

Step	Action
1	Verify the following sections are completed on Form 804: <ul style="list-style-type: none">• Service Level box• Funding source• Period Covered• Signatures of the WDS and Supervisor
2	Remove the bus pass from the safe/locked file cabinet.

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Request for Services, Continued

Bus pass issuance, continued

Step	Action
3	Enter the following information on the Bus Pass Control Log: <ul style="list-style-type: none">• Date issued• Customer name and last 4 digits of social security number• Adult, Dislocated, etc.• Service Level• Bus Pass Number(s)• Balance on hand• WDS name and staff ID#• First initial and last name of issuing WDT
4	Enter the bus pass number in the transportation section of the WDD 804 form.
5	<ul style="list-style-type: none">• Issue the bus pass,• Have customer sign the WDD 804 form to confirm receipt.
6	Sign and date on Issued By line.
7	<ul style="list-style-type: none">• Complete a case note, and• Enter appropriate Supportive Services activity code in the customers file in CalJOBS.
8	<ul style="list-style-type: none">• Give a copy of the WDD 804 form to the WDS to show customer picked up bus pass, and• File original by month in the designated file.

CalCard

Each America's Job Center of California (AJCC) has been issued CalCards to use for purchasing items used as supportive services when vouchers are not used. The Supportive Service Authorization Levels will apply to the process. Any purchases of \$500.00 or more requires three (3) quotes to be included prior to using the CalCard.

Note: Refer to the Program Guide, Chapter 3 – Supportive Services for the process.

Voucher issuance

The WDT completes the following steps when issuing a vendor voucher:

Step	Action
1	<ul style="list-style-type: none">• Ensure receipt/invoice is attached, and• Verify amounts.
2	Verify the following sections are completed on the WDD Supportive Services 804 form: <ul style="list-style-type: none">• Service Level box• Funding source• Period Covered• Payable to – Vendor Name and Address• Signatures of the WDS and Supervisor

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Request for Services, Continued

Voucher issuance, continued

Step	Action
3	<ul style="list-style-type: none"> Remove a Voucher from the safe/locked file cabinet
4	<ul style="list-style-type: none"> Ensure the voucher # matches, and Enter the following information on the Voucher Control Log: <ul style="list-style-type: none"> Issue date Number issued and Voucher number Customer name Last 4 digits of social security number Dollar Amount issued Funding source - Adult, Dislocated, etc. Service Level Balance on hand Name of WDS in "authorized by" column First initial and last name of issuing WDT in "card custodian" column
5	Enter the following information on the voucher: <ul style="list-style-type: none"> Last 4 digits of social security number Date issued Funding Source (Adult or DW) Participant name (customer name) Activity (service level) WDS name/staff ID #/WDS phone number Vendor information Void date – enter 10 business days from issuance date Maximum Amount Payable – amount approved on the WDD 804 form (ensure receipt matches) Item – enter "Items per attached only" or list each item Amount – no entry in this column is necessary Issuance Clerk - sign and date Stamp voucher with AJCC address in the "forward" box
6	<ul style="list-style-type: none"> Make a copy of the receipt or invoice, Have customer sign and date for receipt of voucher, Explain to customer the voucher is only valid until the void date and can only be used for items listed on the receipt/invoice, and Obtain customers signature on voucher upon receipt of items/service.
7	<ul style="list-style-type: none"> Detach pink copy of voucher, staple to original receipt/invoice with the WDD 804 form, and Staple copy of receipt/invoice to white and yellow voucher copies and give to customer.
8	Complete a case note and appropriate Supportive Services activity code in the customers file in CalJOBS.
9	<ul style="list-style-type: none"> Provide copy to WDS, originals (with pink) in pending file, and Enter info on the daily transmittal under "Voucher to Vendor".

Note: Actual amount payable may vary by 4% based upon sale or cost increase of item.

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Request for Services, Continued

Returned vouchers by vendor

The vendor returns the white portion of the voucher after providing the customer with purchased items. The following steps are taken to start the payment process:

Step	Action
1	Match original white voucher to pink copy.
2	Review vendor certification signatures and amounts.
3	Log information on the Daily Transmittal sheet using the "Voucher to Fiscal" section.
4	Send originals (pink and white, WDD 804 form, and receipts) to fiscal.
5	Complete a case note in the customer's file with the following information: <ul style="list-style-type: none">• Voucher #,• Dollar amount, and• Date sent to fiscal.

Section 2

Workforce Development Technician

Administrative Functions

Overview

Introduction

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

- Set fundamental standards that guide us in our work.
 - Maintain flexibility to meet the special needs of the three (3), diverse regions we serve
 - West Valley,
 - East Valley, and
 - High Desert).
 - Review our effectiveness and “raise the bar” whenever possible.
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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

The Workforce Development Technician (WDT) and/or Employment Development Department (EDD) staff assists customers in the Resource room. List of tasks staff members may perform in the Resource room are as follows:

- 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 WIOA programs and services to the public,
 - Monitor customer time on the computers to ensure equipment is used properly and customers are rotating if resource room is crowded,
 - Maintain copiers, printers, and fax machine paper levels,
 - 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.).
-

Resource Room equipment

The resource room is designed to provide equipment and software for a job seeker needs for an effective job search. The equipment includes:

- 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
-

Transmittals/Fiscal Reporting

Introduction

Fiscal reporting is completed on a daily, weekly, and monthly basis. Documents must be processed and sent to Workforce Development Department (WDD) Administration (ADMIN) for payment.

Daily transmittal

On a daily basis, all Invoices, Vouchers, and Reimbursements are tracked and reported to the Workforce Development Manager and Fiscal unit. The Workforce Development Technician (WDT) will complete the following steps:

Step	Action
1	Enter all document information in the corresponding columns of the transmittal spread sheets.
2	<ul style="list-style-type: none">• Make a copy of the transmittal sheets, WDD 804 form (vouchers and reimbursements), and• Send originals to Fiscal.
3	File copy of the transmittal and voucher information in the America's Job Center of California (AJCC) Fiscal folder.

Weekly reconciliation reports

On a weekly basis, a report is sent from Fiscal for reconciliation; the WDT is responsible for reconciling the report. The following steps are completed:

Step	Action
1	Retrieve report from Fiscal.
2	Reconcile report; ensure daily transmittals match the Fiscal report.
3	E-mail, deliver, or Inter-office mail the results to Fiscal.

Monthly reporting request for services

On a monthly basis, the control logs for vouchers, gas cards, and bus passes issued are sent to Fiscal. The month end report will include the following:

- Original Control Logs for current month
- Original WDD 804 form documents for all bus passes and gas cards

Note: Do not send the monthly report in same envelope as daily transmittal.
