

Section 5

Business Services Technician

Overview

Introduction

The Workforce Development Department (WDD) administers the Workforce Innovation and Opportunity Act (WIOA) program for San Bernardino County. The focus of work for Business Services is to build partnerships for the development and expansion of industry sector strategies and to meet the needs of employers, workers, and job seekers within San Bernardino County.

This section provides information on the responsibilities of the Business Services Technician (BST) who provides support to the Business Service Unit (BSU).

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Business Services Technician

Introduction

The focus of work for the Business Services Unit (BSU) is to administer the department's:

- Business retention and expansion program, and
- Collect and disseminate economic data to businesses, community organizations, education, and other government agencies.

The Business Services Technician (BST) provides support to the Business Services Unit in various job duties. This section outlines the various duties completed by the BST.

Administration tasks

The BST is responsible for the following tasks:

- On-the-Job Training (OJT) contracts
 - Help to process the contracts,
 - Log, and
 - Submit invoices.
 - Collecting Business Services Stats
 - Meeting minutes
 - Workshop assistance/attendance
 - Job Fair assistance/attendance
 - Monthly reports
 - Requisitions and submissions
 - Assisting the business services team
 - SmartSheets/Tracking logs
-

Business Services stats

The BST is responsible for compiling and submitting monthly, quarterly, and annual stats reports to the Business Service Supervisor (BSS) and Manager (BSM). The information is posted on the business services SmartSheets portal by the Business Service Representative (BSR) and Business Service Specialist (BSS). The business stats are on:

- OJT counts, program information, and sector
 - Job order and opening counts
 - Incumbent Worker counts
 - Business visits
 - Job Fair attendance and employments
 - Recruitment attendance and employments
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Workshop

Business Services offers a variety of workshops to assist businesses to reduce layoffs, or business closures. A workshop is a corporate event where skills and knowledge can be shared in a group. BSU conducts workshops throughout the year and the BST assists the team with:

- Developing flyers (utilizing approved templates),
 - Conducting reminder calls to registered attendees, and
 - Submitting printing services request through the 003 process.
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Business Services Technician, Continued

Job Fair/ Recruitment

Each year Business Services plans and presents numerous job fairs throughout the County and at the three (3) America's Job Center of California (AJCC). The BST assists the team, whenever possible, with:

- Employer registration, and
 - Set up at job fair and recruitment events.
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Flyers and brochures

Approved flyers for Business Services to utilize are saved in the Business Services Share Drive. The flyers and brochures will get updated whenever a workshop or event is taking place. Flyers are also uploaded onto the Workforce Development Board website and included in the Eventbrite invitation.

When a new flyer or brochure needs to be created and BST is not using an existing flyer, the BST will send the information to the WDD Administrative Secretary II to create. All flyer/brochure must be approved for County branding following the guidelines outlined in the Administration Handbook, Chapter Media

All BSU flyers and brochures are saved on the **WDD Intranet**.

Meeting minutes

The BSU meets on a regular basis with the BSS and BSM. The BST is responsible for:

- Taking meeting minutes, and
- Providing written meeting minutes to the BSS and BSM.

Copy of the meeting minutes are saved in the **WDD-Share drive>Business Services>Business Services Meeting Minutes folder**.

Monthly reports

The BST is responsible for the following three (3) Business Services monthly reports obtained through the SmartSheets portal:

- Business visit report,
- Survey Retention report, and
- Business Services event information

The monthly reports are saved in the following **WDD Share Drive>Business Services >Admin folder**.

Requisitions and submissions

Requisitions and submissions for the following are completed by the BST:

- 003 purchases and printing services requests,
- Chambers of commerce,
- Special events,
- Food for events,
- Rentals (chairs/tables), if needed, and
- Business cards.

Note: Refer to the WDD Administration Handbook, Section 7 – Fiscal for information on the 003 process. All 003's for BSU is saved in the **WDD Share drive>Business Services>003**.

OJT Contracts

Introductions

An employer provides On-the-Job Training (OJT) to a paid participant engaged in productive work and enrolled in the Workforce Innovation and Opportunity Act (WIOA) Title I Adult, Dislocated Worker, or the Youth programs.

This section provides information the Workforce Development Department (WDD) Administrative Business Services Technician (BST) completes regarding the OJT process.

OJT administration

As the OJT administration, the BST is responsible for the following:

- Review OJT contracts and invoices,
 - Inform Business Services Representative (BSR) of errors for correction,
 - Process OJT contracts and invoices,
 - Track contracts and invoices in the Unit's SmartSheets tracking log,
 - Scan/upload contracts, business documents, invoices, and certificate of completions to SmartSheets and CalJOBS,
 - Verify all business documentation is obtained and complete,
 - Verify OJT trainees are registered and enrolled in CalJOBS,
 - Reconcile OJT logs with fiscal to align with budget reporting and system reporting,
 - Log OJT obligation and deobligation into Business Service Budget (SmartSheets),
 - Process OJT contracts and invoices for submission to fiscal unit, and
 - Report information on how many OJT trainees is retained for employment.
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OJT tracking log

The OJT tracking log (SmartSheets) is used to assign OJT contract number and to capture the following data information:

- | | |
|-----------------------------------|-----------------------------------|
| • Request date | • Provider hourly rate |
| • Start date | • Allowable training hours |
| • End date | • Actual obligation amount |
| • Modification date | • Percentage reimbursement |
| • Contract number | • WIOA hourly rate |
| • Status | • 1 st payment hour |
| • Employer name | • 1 st payment amount |
| • Employer count | • 2 nd payment hour |
| • Industry sector | • 2 nd payment amount |
| • BSR | • Cumulative hours |
| • Client source | • Cumulative Year-to-date payment |
| • Employer location | • Outstanding hours balance |
| • District | • Outstanding obligation |
| • AJCC | • Deobligate amount |
| • Funding Source | • Received certificate |
| • Client Last Name | • Notes |
| • Client First Name | • Fiscal notified to deobligate |
| • Social Security Number (last 4) | |
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OJT Contracts, Continued

OJT tracking log, continued

In addition to the data information, the OJT tracking log includes the following tabs the BST completes:

- Dashboard Graphs
- Dashboard data
- FY(2-digit number for year)AD
- FY(2-digit number for year)DW
- Graphs special funding
- Dashboard special funding
- FY(2-digit number for year)P2E
- FY(2-digit number for year)Youth
- Special Grant 2
- Special grant
- Data validation

Note: The OJT Contract number begins with fiscal year (FY), the 2-digit year, and whether the client is an adult or dislocated worker. Each FY the contract number begins with 1 (**example:** FY22AD1) and is in a sequential numbering system.

OJT tracking log location

The [OJT Tracking log](#) is located in the SmartSheets portal and only the BST, BSS and BSM have access to the log.

OJT contract number

The BST will provide an OJT contract number to all OJT's received by the Business Services Unit (BSU). The table below outlines the process the BST completes.

Step	Action
1	Receives an email from the BSS via DocuSign, stating: <ul style="list-style-type: none">• The contract has been approved,• The OJT contract needs a contract number, and• CalJOBS registration confirmation is attached.
2	Verifies the CalJOBS registration confirmation is attached in the email along with the OJT contract.
3	<ul style="list-style-type: none">• Receives the OJT Contract through the DocuSign process, and• Reviews OJT contract for completeness.
4	Accesses SmartSheets OJT tracking log. Note: Do not assign the OJT Contract number, without entering the information into the OJT Tracking Log.
5	<ul style="list-style-type: none">• Verifies if the customer is an adult or dislocated worker,• Opens the appropriate tracking log, and• Enters customer and employer information along with dates into the OJT tracking log on the appropriate SmartSheets (FYAD or FYDW).
6	Saves copy of the approved email from the Director and/or BSM in the employer's folder on the Business Services share drive.

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OJT Contracts, Continued

OJT contract	<p>BST will receive the completed OJT contract with all signatures obtained through the DocuSign process. The BST will:</p> <ul style="list-style-type: none">• Review contract to ensure all the information is completed along with verifying the signatures and initials are complete.• Verify the start and end dates with the information entered on the OJT tracking log. Information doesn't match, update OJT tracking log with the new dates.• Scan a copy of the OJT Contract in the Customer's physical file in CalJOBS.• Uploads documents into SmartSheets.
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OJT Invoices

Introduction

The On-the-Job Training (OJT) invoice is sent to the employer at the completion of the contract. This section provides guidance for the processing of the OJT Invoice and ensure the customer has completed the OJT requirements per the contract.

OJT Employer Invoice

The OJT Employer Invoice is pre-populated with the Employer's information and the employer is required to submit one (1) final invoice to the Business Service Representative (BSR) at the end of the contract.

The OJT Employer Invoice includes the maximum reimbursable caps for hours per day and month as follows:

- Maximum reimbursable hours per day = 8 hours
- Maximum reimbursable hours per month = 160 hours

The employer is to continue entering training hours in the 31-day table and tabulate the total hours for the invoicing period.

The invoice is reviewed and processed by the Business Service Technician (BST) who ensures the hours credited for the invoicing period adheres to the reimbursable cap requirements as follows:

1. Convert entries exceeding 8 hours to the reimbursable cap of 8 hours.
 2. Calculate total hours for the month.
 3. Submit invoice to fiscal for reimbursement:
 - If total hours exceed 160 hours – adhere to maximum reimbursable cap per invoice before submitting reimbursement for payment.
 - If total hours are less than 160 hours, submit the equivalent hours for reimbursement.
 - In either scenario, the available balance of reimbursable hours needs to be identified to ensure the contract amount is not exceeded.
 4. Scan a copy of the invoice in the participants case file in CalJOBS and to the contract on SmartSheets.
 5. Complete a case note about the receipt and process of the invoice in the employer's and participant's case file in CalJOBS.
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OJT tracking log

Once the OJT Contract is completed, the BST will update the OJT Tracking log in SmartSheets to complete the following data information:

- Change status to complete or incomplete.
 - Enter total training hours from the invoice to the 1st payment hours column.
 - Verify the total is the same as is written on the Invoice for total reimbursement amount.
 - Complete columns:
 - AG: Received Certificates,
 - AH: Notes, and
 - AI: Fiscal notified to deobligate.
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Fiscal

BST will give a copy of the completed OJT invoice to the fiscal unit for processing the payment for the employer.

OJT Close-out Process

Introduction

This section provides information regarding the On-the-Job Training (OJT) close out process the Business Services Technician (BST) completes when an OJT is completed.

Close-out packet

The BST is responsible for ensuring the close-out of an OJT is completed, documents received and are uploaded (i.e. SmartSheets, share drive, CalJOBS, etc.). The close-out packet consists of the:

- OJT Invoice (including back-up documentation: payroll reports, pay stubs, etc.,
- OJT Performance Review, and
- OJT Certificate of completion.

These documents are fillable PDFs and are not included in the OJT DocuSign process due to formulas that are embedded in the document to ensure appropriate hours and totals are entered. The BSR will email the close-out document to the employer at the appropriate time. Once the close-out documents are returned to the BSR, he/she will forward the documents to the BST for processing.

Note: Refer to the Training for the OJT process in the Program Guide, Chapter 4 – Training for additional information.

Certificate

The BSR will email the Certificate of Completion to the employer to complete if the participant completed a successful OJT. The completed Certificate of Completion is emailed to the BST for uploading document in CalJOBS and completing a case note and measurable skills gain.

Reminder: The BSR will continue to inform the employer to leave the date blank on the certificate.

CalJOBS

Once the BST receives the invoice that the participant has completed his/her OJT contract, the BST is responsible for the following to be completed in CalJOBS:

Step	Action
1	Closes the 301 activity code.
2	Completes the entry for the measurable skills gain and credentials.
3	Scans the participants certificate of completion and/or credentials into the CalJOBS case file.
4	Completes a detailed case note.

Note: BST will send an email to the WDS letting he/she know copies of the invoice, Performance Review, and certificate have been uploaded in the participants case file in CalJOBS.

Incumbent Worker Training

Introduction	<p>Incumbent Worker Training (IWT) provides both workers and employers with the opportunity to build and maintain a quality workforce and increase both participants' and employers' competitiveness. This section provides an overview for the process the Business Services Technician (BST) completes for the IWT.</p> <p>Note: Refer to the Program Guide Chapter 4 – Training for complete details of the IWT process.</p>
IWT employer code /application	<p>Once the employer is approved for the IWT program, the Business Services Specialist (BSS) will begin the participant process and notify the BST to enter the employer code immediately in CalJOBS. The BSS will forward the employer application to the BST so all documents can be saved in the IWT SmartSheets tracking log.</p>
IWT participant questionnaire	<p>Once the IWT is approved and the employer code is completed, the IWT Participant Questionnaire, which is completed by the participant(s) is used as the application to enroll the participant into the program. The IWT participant questionnaire is uploaded into SmartSheets and CalJOBS by the BST.</p> <p>The BST will receive the completed IWT Participant Questionnaire along with the Supplemental questions through the DocuSign process. The BST will review the Questionnaire regarding the Selective Services question. If the question is not answered by the male participant, the BST will search the Selective Services website to verify the participant is registered. A case note is required to be completed in CalJOBS regarding the registration.</p> <p>The completed and signed IWT Participant Questionnaire will be uploaded into CalJOBS under the participant's case file and in the IWT SmartSheets tracking log.</p>
Enrollment	<p>The BST is responsible for ensuring the participants are enrolled in CalJOBS prior to starting the IWT. Any participant who is not enrolled, the BST will enroll each participant of the IWT in CalJOBS, utilizing the IWT participant questionnaire.</p>

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Incumbent Worker Training, Continued

Attendance and progress reports	<p>The BSS is required to obtain attendance and progress reports and forward the documents to the BST. The BST will upload the attendance and progress reports into the participants case file in CalJOBS, complete a detailed case note and upload document to the IWT SmartSheets tracking log.</p> <p>Reminder: Any attendance and progress report submitted with multiple names will need to be separated out prior to the BST uploading documents into CalJOBS. This is important to avoid any Personally Identifiable Information (PII) from another participant from being included erroneously into another participant's case file (monitoring finding).</p>
Close-out	<p>The BST is responsible to close-out the 308 activity code in CalJOBS one the BSS notifies them the IWT has ended.</p>

CalJOBS Activity Code

Introduction

The CalJOBS system is the federally recognized “system of record” for tracking and reporting California’s Workforce Innovation and Opportunity Act (WIOA) Title I participants.

As the system of record, CalJOBS provides a unified and streamlined intake and case management system that enables co-enrollment across programs, and consistent recording of data elements for reporting to the Department of Labor (DOL).

This section provides guidance for the Business Services Technician (BST) on entering the appropriate On-the-Job Training (OJT) and Incumbent Worker Training (IWT) activity code in CalJOBS

OJT Activity code

The CalJOBS activity code for an OJT is 301. The BST is required to create an activity in CalJOBS for the OJT contract. The start and end dates must match the dates listed on the OJT contract. The table below provides the steps the BST completes in CalJOBS to create the activity code.

Step	Action
1	Log into CalJOBS
2	<ul style="list-style-type: none">• Search CalJOBS for the customer’s WIOA application,• Look up customer by:<ul style="list-style-type: none">– First name,– Last name, and– Last 4 social security number for the customer.• Select the appropriate customer to create activity code.
3	<ul style="list-style-type: none">• Select the programs link from the customer’s case,• Locate the active WIOA application for the customer,• Click the “+” under the WIOA application; this will expand the case to allow user to add information to the customer’s case file.
4	<ul style="list-style-type: none">• Click the “+” icon under the Activities tab,• Select the create activity link,• Enter all the information for all required fields (* next to the data element represents the required fields to complete),
5	<ul style="list-style-type: none">• Enter 10B – adult individualized services/training or 30 Dislocated Worker under the Customer program group,• Select the appropriate AJCC location (based on the contract) for the Office Location:<ul style="list-style-type: none">– SBO East Valley AJCC– SBO High Desert AJCC– SBO West Valley AJCC• Enter Activity Code 301 for OJT under the Activity Code data field,• Enter the Actual Begin date (this is not a required field but needs to be entered.• Enter the date under the Projected End Date field

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CalJOBS Activity Code, Continued

OJT Activity code, continued

Step	Action
6	<ul style="list-style-type: none"> Select No for the Participant has been issued an ITA & the ITA will pay for this service question, Complete the following data fields: <ul style="list-style-type: none"> Service, Course or Contract – select the appropriate data based on the AJCC office, Occupational Training code – search for the appropriate training code based on the contract Job Title, and Click Next; a red box appears stating “Required fields - Please correct the following: This service requires worksite information to be recorded. Please enter a worksite name” (this is just a notification to enter the employer information).
7	<ul style="list-style-type: none"> Enter the following employer information based on the information on the OJT Contract: <ul style="list-style-type: none"> – Worksite name, – Address, city, state, and zip code, – Contact person name, – Contact person phone number, – Hourly wage, and – Weekly wage, Click Next.
8	<ul style="list-style-type: none"> Enter the following enrollment cost information: <ul style="list-style-type: none"> – Hourly amount of wage – Wage type – hourly – Duration of the contract (i.e. 320, 480, or 600 hours, etc.) Compare the total OJT wage cost to the total amount of the contract to ensure the amounts match, and Click Next.
9	<ul style="list-style-type: none"> Verify on the Enrollment Budget that the Total enrollment costs match the OJT Contract amount, Click Next (twice), and Complete a case note.

AJCC advisor

Once the OJT Contract is completed and the activity code is entered into CalJOBS, the BST will email the America’s Job Center of California (AJCC) advisor and WDS Supervisor to inform them of the participants OJT Contract is complete.

IWT CalJOBS codes

The IWT program requires specific codes the BST needs to enter into CalJOBS; these codes are as follows:

- E68 – IWT employer code
- 308 – Activity code for IWT participation
- 2284 – Grant code for funding stream (included in the 308-activity code)

SmartSheets/Tracking Logs

Introduction	<p>The Business Service Unit (BSU) utilizes the SmartSheets portal and/or Tracking logs for tracking the following:</p> <ul style="list-style-type: none">• Employers• Title I Programs (Adult, Dislocated Worker (DW), and Youth)• Participants (Title I programs, Prison to Employment (P2E), homeless, etc.)• Trainings (On-the-Job Training, Incumbent Worker Training, etc.)• Weekly Reports
SmartSheets	<p>The Business Services Technician (BST) collects, enters, and saves data to the following list in the SmartSheets portal:</p> <ul style="list-style-type: none">• Title I Programs for On-the-Job Training (OJT)• OJT contract number• OJT contracts (includes invoices and any other supporting documents)• Incumbent Worker Training (IWT) contracts and supporting documents• Business Services Budget• How many OJT trainees are retained for employment
Meeting minutes	<p>The BSU meeting minutes are not tracked in SmartSheets, but rather are saved in the Business Services share drive.</p>