CHAPTER 14

Technology Tools

Overview

Introduction

This chapter provides information about various technology tools Workforce Development Department (WDD) staff use to improve customer service for our participants, employers, and providers.

In this section

This section contains the following topics:

Scanning Guide

Introduction

Imaging is the process of scanning a document and converting the paper image to an electronic image stored in CalJOBS. The purpose of scanners is to allow users to correctly scan documents and streamline the process in real time. This section provides guidelines for the Adult and Dislocated Worker Scanning Policy about the following information:

- Timeframe
- Scan Guide
- Image quality
- Responsibilities
  - Workforce Development Technicians (WDT)/Office Assistants (OAs)
  - Workforce Development Specialist (WDS)
  - Business Service Technician (BST)
- Case Note
- Fiscal
- Trouble shooting
- CalJOBS process
- Monitoring

Timeframe

Staff is required to scan documents into CalJOBS the same day data entry is completed and the moment the document is created or processed.

Scan Guide

The Scan Guide provides information on the various documents imaged into CalJOBS based on the service the customer receives. Staff will refer to the Scan Guide to determine the naming convention and document tags to use when uploading documents into CalJOBS.

All documents referenced in the Scan Guide are required to be uploaded into CalJOBS.

Note: Refer to the Scan Guide for a detailed list of documents and naming convention. Scan Guide is located in the **Intranet>Resources and Reference tab>Quick Reference Guides.**

Image quality

The Kodak system has nine (9) different settings, but it defaults the scan images in color. Staff should not change the setting, as this will allow blank documents to be deleted. Staff are required to ensure quality images are scanned into CalJOBS.

Unable to scan into CalJOBS

In the event a user is unable to upload into CalJOBS, a Helpdesk ticket must be submitted.

Note: Refer to *Administration Handbook, Section 16, Computer and MIS Policy* for additional information.

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Scanner software

The scanner software features available for programming is Smart Touch. Documents are scanned based on the Scan Guide Document tags and all users have the Smart Touch software programmed on the scanners.

Case review

The Supervisors/Managers and Admin staff will incorporate reviewing scanned images into their monthly case review process. This will supplement the review efforts conducted by AJCC staff and ensure documents are legibly scanned into CalJOBS.

Disability information

Any documents containing disability related information must be encrypted and scanned into CalJOBS. This includes program specific documents and supporting documentation.

The Supplemental Disclosure Form (SDF) will only be obtained if the CalJOBS system is down for a long period of time or if it is in the best interest for the customer. If the SDF is obtained, the form is required to be encrypted and saved in the designated AJCC share drive folder and does not need to be scanned into CalJOBS.

When creating a case note regarding ability or eligibility staff should consider the following statements:

- Ability – the case note can state the customer’s skill set is compatible or not compatible with the job requirements without referencing a disability.
- Eligibility – the case note can state scanned documentation explains or provides the information about the customer’s eligibility.

WDT/OA/BST responsibilities

The WDT and OA will be responsible for scanning the following documents into CalJOBS:

- Workforce Innovation and Opportunity Act (WIOA) Application bundle, and
- Comprehensive Adult Student Assessment Systems (CASAS)

The BST is responsible for scanning and uploading the On-the-Job Training (OJT) Questionnaires and the OJT Certificates into CalJOBS.

Note: Refer to the Scan Guide for detailed descriptions.

WDS responsibilities

Once a case is assigned to a WDS, it will be his/her responsibility to ensure the images scanned by the WDT/OA were captured and are legible in CalJOBS. The WDS is responsible for scanning the following documents into CalJOBS:

- Resume,
- Partner Referrals,
- Individual Employment Plan (IEP),
- Self-sufficiency bundle,
- College degrees (i.e., Associate of Arts, Bachelor of Arts, etc.) in lieu of CASAS,
- Training Guidance Packet,

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WDS responsibilities, continued

- Individual Training Account (ITA),
- Non-ITA bundle,
- ITA Amendment,
- Training Certificates,
- School progress and attendance reports,
- Training benchmarks 1 & 2 (Supervisor initial not required for scan), and
- OJT skills gap bundle.

Note: Refer to the Scan Guide for detailed descriptions.

Miscellaneous documents

Miscellaneous documents are not unique to the America's Job Center of California (AJCC). They are necessary, supportive documents and must be case noted. If a staff member is unsure whether a document qualifies as miscellaneous, a Supervisor/Manager will provide guidance. The staff member who obtains/processes the document will scan the document into CalJOBS.

Fiscal Admin

Fiscal will scan documents into the System Applications and Products (SAP) platform for payment processing of internal and external items, such as, but not limited to:

- Contracts,
- 003 forms,
- Vendor quotes/invoices,
- Receipts and other supporting documentation, and
- Purchase orders.

Help Desk

In the event a scanner loses functionality, or a document was uploaded in error and requires deletion from CalJOBS, staff will submit a help desk ticket.

Note: Refer to the "Help Desk" section in this chapter or the *Administration Handbook, Section 16, Computer and MIS Policy* for additional information.

Signatures on documents

As a rule, all documents are required to include the necessary signatures on them prior to uploading them into CalJOBS. The **Exception** is the Reimbursements, where final signatures from Admin personnel is required; staff will upload these documents without the final signatures.

Individual Training Account (ITA) and On-the-Job Training (OJT) contracts will obtain signatures following the DocuSign process.

Note: Refer to the DocuSign section in this chapter and the Program Guide, Chapter 4 – Training for additional information.

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Scanner process

Once the Smart Touch software program is completed, the user will have a Kodak Scanner icon appearing on his/her computer desktop. The table below outlines the steps staff completes for scanning documents.

Step	Action
1	Click on the Kodak scanner icon to start the scanning process.
2	Scan documents as: • Color PDF, and • Double-sided. **Note**: The Super User will program the scanners to default to the Color PDF, double-sided feature as well as delete any blank pages from the scanning process.
3	Load documents: • Top-edge, and • Face down. **Note**: Documents can be rotated if scanned incorrectly prior to saving documents in the user's data folder.
4	Save document directly into CalJOBS. **Note**: Refer to the Scan Guide for detailed list of documents and naming convention.

CalJOBS process

The table below outlines the steps staff completes for uploading documents into CalJOBS should the direct scanning not be available.

Step	Action
1	Access CalJOBS.
2	• Locate customer in the CalJOBS system, and • Select Documents under Staff Profile Menu.
3	• Select the Add a Document button, and • Complete the following entries: − Document Association: ✓ Program – Title I ✓ Application – select appropriate WIOA application ✓ Verification Item & Type – leave blank − Document Information: enter appropriate document tag, refer to the Scan Guide, − User Accessible – response is No − Attach document: ✓ Select Browse ✓ Locate the saved file ✓ Click Insert or Open button ✓ Click Save • Verify documents are legible.
4	Case note all actions completed.

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Hard copies

All scanned documents (except, ITAs and Program Referrals) can be shredded after 30 days from the point of creation. However, scanned documents must be verified the images are scanned and legible in CalJOBS prior to shredding.

Monitoring

Scanned documents will be monitored and reviewed monthly for compliance and accuracy. When scanning irregularities are identified through the case review process by the supervisor, manager or administrative staff, corrective action will be required.

Review files in preparation for any upcoming program monitoring. In this scenario, should it be uncovered documents were not scanned and/or improperly scanned; supervisor/manager will have staff take corrective action immediately.

Additional uses

Additional uses for scanners will be limited to scanning:

- Documents for customers (i.e., resumes, etc.), and
- Flyers, Brochures, and/or other documents provided in hard copy form.

Scanning is only used for WDD related purposes to assist customers or scanning documents into CalJOBS. Scanners are not for personal use.

Help Desk

Introduction

This section provides guidance and information for America's Job Center of California (AJCC) staff on submitting Help desk tickets through the Workforce Development Department (WDD) website.

Link

The link to access the Help desk ticket website is as follows:

https://sbcounty.service-now.com/esc

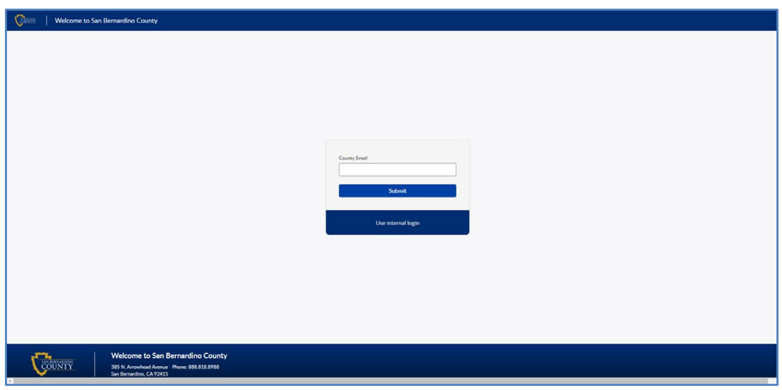
AJCC staff should retrieve the link and add the link as a "favorite" in his/her web browser for easy access.

Help desk ticket form

AJCC staff will be required to complete the Help Desk form,, which is located on the **Intranet>Forms>Referral Forms & Miscellaneous tab** in addition to submitting a request through the Help Desk website.

Help desk website

Help desk tickets can only be submitted via the website. Staff will use his/her WDD email address to enter the site:



How can we help?

Once staff has entered into the website, he/she will be taken to the "How can we help?" platform.

The platform includes the following information:

- Recommended for you:
  - Submit a Request
  - Telecom Request
  - Report an Issue
- Popular topics
  - Innovative & Technology
  - Employee Services
  - IT Infrastructure
  - Service Desk
  - Business Solutions
  - Telecom

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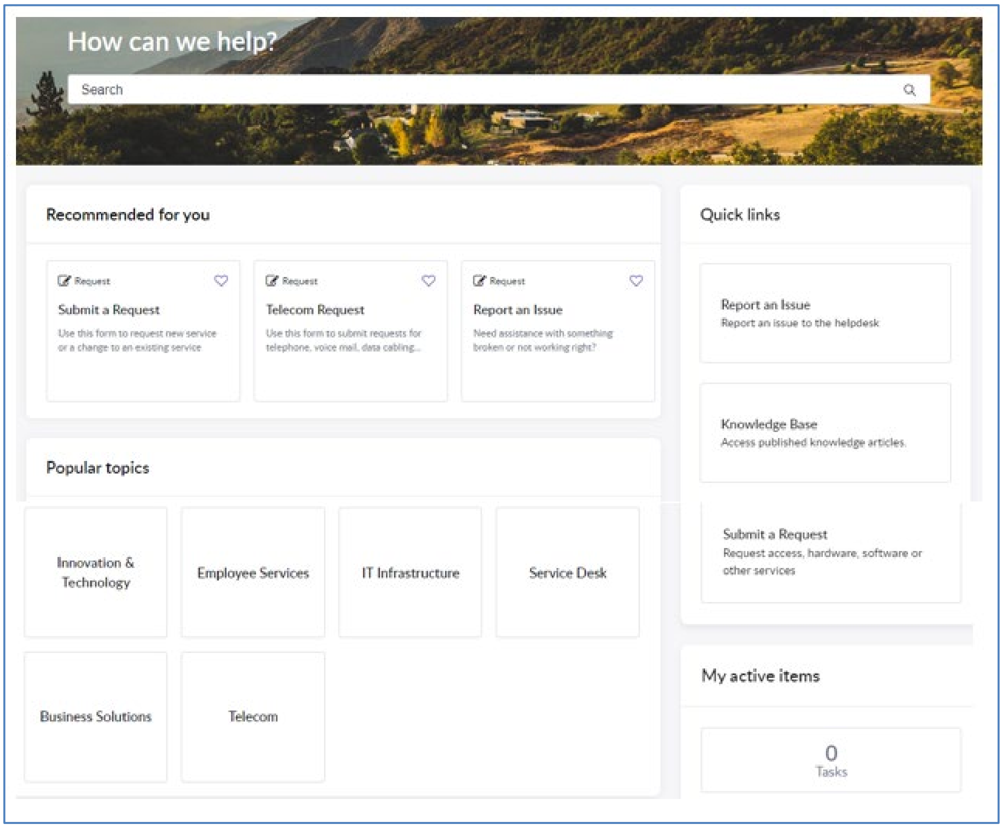
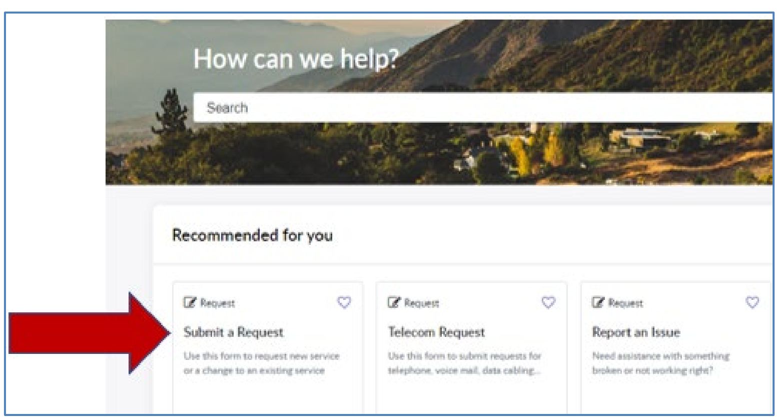
How can we help?, continued

- Quick links
  - Report an Issue
  - Knowledge Base
  - Submit a Request



Data correction

To request a data correction, staff will select “Submit a Request” from the website to initiate the Help desk ticket.



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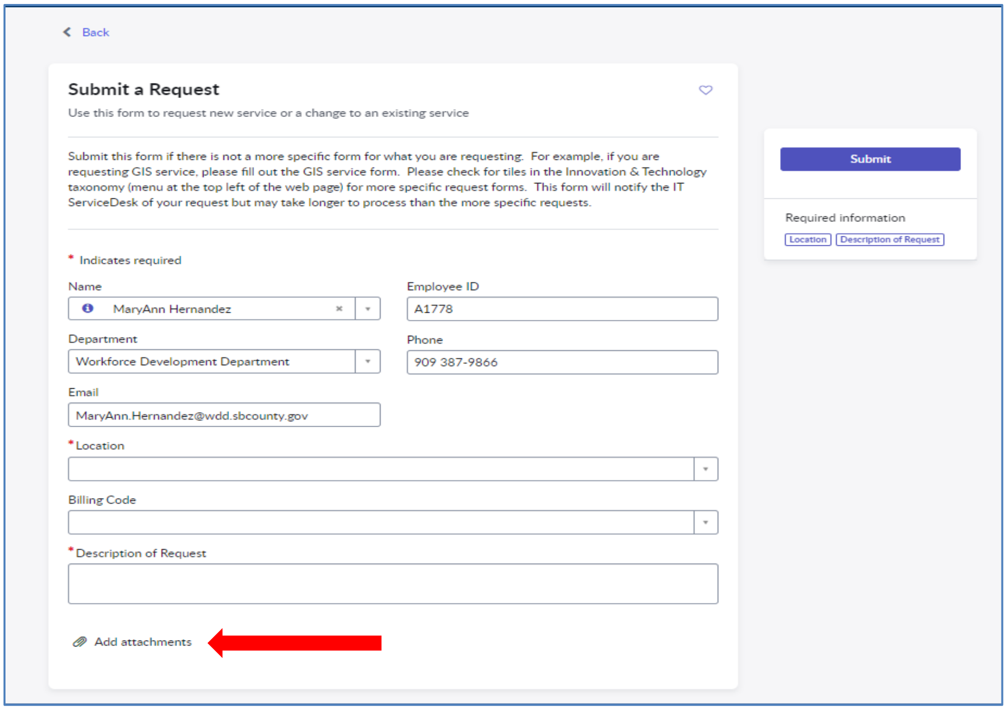
Data correction, continued

A “Submit a Request” template will appear, and staff will be required to complete all the required fields.

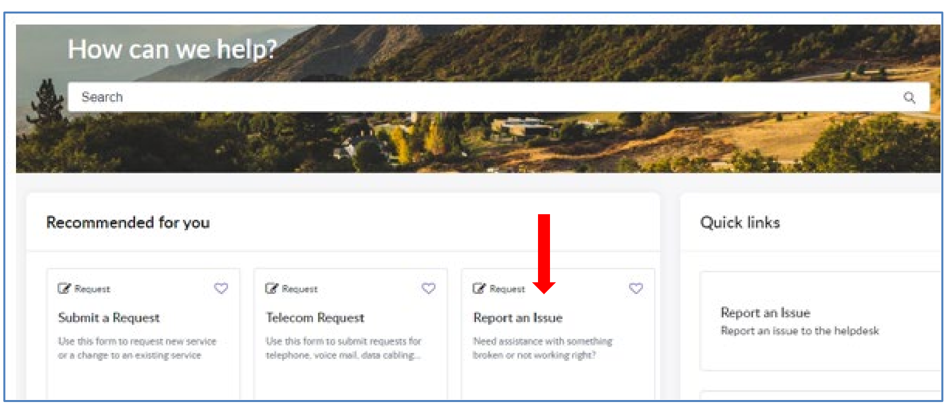


In the “Description of Request field” staff must type **“Route to WDD, see attached document”** to ensure the ticket is sent to the appropriate team member to review and assist with the data correction. Staff will attach the completed Help Desk form to the request prior to selecting the “Submit” button.

Once the “Submit” button is selected, the request is complete, and staff will be notified when the data correction is completed.

CalJOBS issue

To report a CalJOBS System issue, such as unable to reach a page, or a functionality issue (i.e., drop down menu missing) staff will select “Report an Issue” from the How can we help platform.



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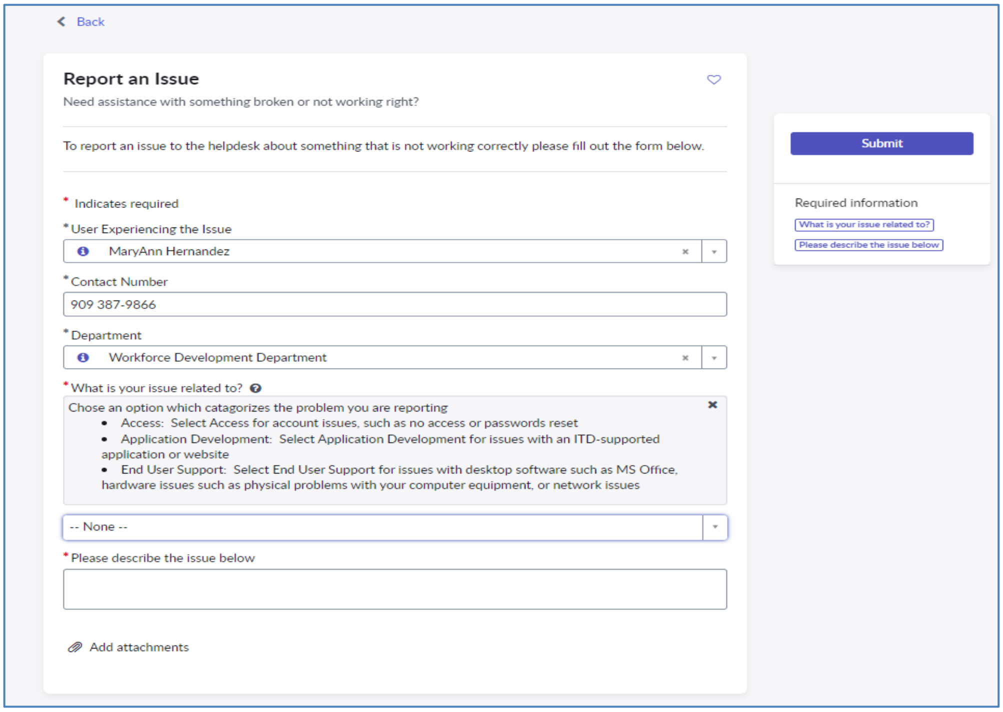
CalJOBS issue, continued

The “Report an Issue” template will appear, and staff must complete all the required data fields.



In the “Please describe the issue below field” staff must type **“Route to WDD”** and include the description of the issue to ensure the ticket is sent to the appropriate team member to review and assist with the CalJOBS issue.

Staff will attach the completed Help Desk form to the request prior to selecting the “Submit” button. Once the “Submit” button is selected, the request is complete, and staff will be notified when the data correction is completed.

DocuSign

Introduction

The purpose of DocuSign is to allow various individuals to sign documents in a more streamlined process in real time and to reduce the use of transmittals to Workforce Development Department (WDD) Administration. This chapter provides guidelines for the *WDD America's Job Center of California (AJCC)* and Business Services staff who will use DocuSign to:

- Send documents to staff, providers, employers, and customers for signatures, and
- Expedite approvals and amendments.

What is DocuSign?

DocuSign is an agreement management application that enables users to create, send, and automate a wide variety of forms and contracts enabling signees to sign documents electronically, thereby eliminating the need for hard copies of documents.

DocuSign ensures the security, mobility, reliability, and ease needed to digitally transmit documents to customers, training providers, employers, and staff for signature.

DocuSign allows organizations to manage electronic agreements, offers eSignature, and a way to sign electronically on different devices.

DocuSign allows WDD to assign different roles, allow for multiple signers to access and complete an agreement, and access beyond signing permissions.

Website

The DocuSign website link staff will use are as follows:

- Active account: https://app.docusign.com
- Developer account: https://appdemo.docusign.com

Forms

The following forms are available in DocuSign for staff to use when requiring signatures from customers, training providers, employers, supervisors, managers, and fiscal:

- Individual Training Account (ITA) Contract
- ITA Contract Amendment
- On-the-Job Training (OJT) Contract
- OJT Contract Amendment
- Supportive Services – *Reimbursement Only*
- 003 & 003 Staples Order

<u>Note</u>: Additional forms will be added as they are developed and created in DocuSign. Any form in DocuSign **will not** be made available on the Intranet.

Templates

Templates of the forms have been created by the WDD DocuSign Administrator for staff to use. The templates include field validation logic embedded into the forms, including who completes each input field and workflow.

Staff **will not** be allowed to edit or create templates in DocuSign; all templates must be created and edited by the WDD DocuSign Administrator.

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Templates, continued

Staff is no longer required to select “send envelope” to start the template process; staff will be able to attach the required documents directly from the template by clicking on the **Attachment Icon** (see below for icon image). Attaching documents is a mandatory step, and staff will be unable to proceed without doing completing the step. **Attachment Icon**:

Recipient page

The Recipient page is where staff will complete the information regarding:

- Staff,
- Customer,
- Training Provider/Employer,
- Email address, and
- Messages.

Once the template is sent, DocuSign initiates emails to the individuals listed on the page. The documents will not go to the next recipient until the prior recipient completes his/her action.

From the Recipient page, under the “Message to all Recipient section” staff will edit the subject line to enter the customers information.

Based on the template selected, the subject line will include the form name along with parenthesis asking for the customers first name and initial of his/her last name

Example:

- Staff selects the ITA template.
- Subject line will be pre-populated as “Individual Training Account (ITA) – (First name, Last name initial)”.
- Staff will enter the participants’ name after the word ITA (e.g., Individual Training Account (ITA) Jane S).

Reminder: Due to Personally Identifiable Information (PII), a customer’s full name cannot be listed in the body of the email or subject line of the email.

Language

Under the “Message to all Recipient section”, staff has the option to select a language for the recipient to receive. To select a language for a specific individual, staff will check the box for individual messages, which is located directly under the words “Message to all Recipient”.

Language selection is good to use when email needs to be sent to an individual in a different language. However, only the DocuSign instructions are translated not the field description, or any message typed in the message text box.

Example: The email to the recipient informing them to “Review Documents” will be translated in the language selected, but a message staff entered in the text box letting customer know this is the training contract will not be translated.

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Sign Now or Sign Later

Once staff selects the **Hit Send** button, he/she will be prompted to "Sign Now or Sign Later".

Sign Now – Allows staff to finalize, sign, and date the document so DocuSign can initiate emails to the prospective individuals to review and sign.

Note: Once Sign Now is selected, the document will open, staff must first select the appropriate AJCC before tabbing through the document and before signing/dating.

Sign Later – Allows staff the opportunity to complete his/her portion of the ITA document at a later time. When this option is selected, DocuSign will send an email to the WDS letting them know he/she needs to complete his/her portion of the ITA document. The routing process will **NOT** occur until the WDS completes their sections.

Finish Later

Once staff has the document opened to review, sign, and date the ITA contract and determines he/she needs to step away; staff can select "other actions" and select "Finish Later" from the drop-down menu. Once "Finish Later" is selected, DocuSign will send reminders to the WDS to complete his/her portion of the ITA document.

Tips

User can hover over a data field, which requires information to be entered, and a tip pop-up window appears. The tip pop-up window provides information of what needs to be entered in the data field. If a different language was selected for an individual only the field description is translated, not the information to be entered.

Create an Account

The individual receiving the email is not required to create an account in DocuSign to open, review, or sign the documents sent to them. Individuals only need to click on "No Thanks" to view the documents and complete the required entries before clicking on Finish for submission.

Manage documents

Once staff selects "finish" after signing and dating the document, he/she can go to the Manage tab to see the status of any document. The Manage tab is staff's Inbox, staff can click on the document to view the status, as to:

- Who has the document currently?
- Who has completed the review?
- Have all the signatures been obtained and form is completed.

Merge PDF Documents

Once the ITA contracts are completely signed and approved by all, the system automatically sends an email with two Portable Document Format (PDF) files:

- Completed signed contract, and
- Terms and Conditions.

Staff will be required to merge the two (2) PDF documents into one (1) document before uploading into CalJOBS by completing the following steps:

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Merge PDF Documents, continued

Step	Action
1	• Access DocuSign account, and • Go to the **Manage** tab.
2	• Find document to merge, • Click on the word **Download**; pop-up window will appear: – Check the **Combine all PDFs into one file** box, – Uncheck “Certificate of Completion”, and • Click **Download** button.
3	• Go to **File Explorer** folder on the computer, • Locate the **Download folder** to retrieve merged documents, and • Move document to an appropriate folder to save in CalJOBS.
4	• Upload merged document into the participant’s case file in CalJOBS, and • Complete a detailed case note.

Note: Staff is not allowed to use any outside websites to merge any documents, unless approved or issued by WDD. Use of other websites is considered a breach of a customer’s PII, as the websites may not be secure.

Workforce Compass

Introduction

Workforce Compass is an innovative career navigation and learning platform launched by the National Association of Workforce Boards and FutureFit Artificial Intelligence (AI) to better support local workforce boards across the country.

Workforce Compass is a human-centered approach to workforce development with an emphasis on:

- Career exploration
- Technology access
- Person-centered services
- Future of work

The Workforce Development Department (WDD) Workforce Compass site is called **"San Bernardino County Career Navigator"**. This section will provide guidance and policy regarding the platform for WDD.

Links/access

The link to access the **San Bernardino County Career Navigator** website is as follows:

https://app.futurefit.ai/sign-up

Staff will create two (2) accounts:

1. **Coach account**
   - Employees WDD email account is used
   - Helps staff manage customers who are interested in learning more about Workforce Innovation and Opportunity Act (WIOA) services and how to assist customer to reach his/her goals.
2. **User account**
   - Employees will use his/her WDD email account plus the testuser identifier (Firstname.lastname+testuser@wdd.sbcounty.gov).
   - Staff can log in as a user and can see what the customer sees when he/she is attempting to access the system and unsure where to locate or research information.

However, Workforce Development Technician (WDT) **will not** create a **user account**, but rather will create an **Admin account** to access reports as follows: Firstname.lastname+admin@wdd.sbcounty.gov.

Purpose

The San Bernardino County Career Navigator is a user-friendly interface that:

- Provides insights into the job seekers background to have more meaningful and focused conversations, and
- Helps to identify what skills may be needed for the job seeker to reach his/her goals.

San Bernardino County Career Navigator is a tool used to enhance the user experience and for outreach opportunities for staff when participating in any WDD public events, job fairs, as a workshop, or career exploration for training. In addition, customers who come to the office for utilizing the resource room for self-service can use San Bernardino County Career Navigator as a career exploration and job search.

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What is Workforce Compass

San Bernardino County Career Navigator (aka. Workforce Compass) is one consistent and personalized exploration to employment to journey experience for job seekers. Based on the employment and education information entered or the individuals uploaded resume the system provides six (6) key coach/staffing support tools:

- Onboarding Flow – Set of forms and rules to streamline customer intake.
- Tags – Terms/keywords used to identify and manage users.
- Roadmap steps – “To do” steps to guide the user journey.
- Career Passport & Recommenders – Job profile used to recommend careers, learning, and jobs.
- Resources/Learning – Catalog of resources and training options for jobseekers in San Bernardino County.
- Notes – Customer contact management as a brief record of facts (this is not linked to CalJOBS).

Career Exploration options

The Career Exploration portion of the San Bernardino County Career Navigator is a great tool for customers who just want to use the self-serve process to explore his/her career options, job search, and/or education.

Customers who decide he/she would like to explore WIOA training and education opportunities and has enrolled into CalJOBS, staff can discuss with the customer the career opportunities he/she identified in the San Bernardino County Career Navigator platform.

WDT responsibilities

The WDT is responsible for the following:

- Reviewing the monthly Job Fair reports to determine the customers who wish to be contacted for potential WIOA services:
  - Answered yes to the question about wanting to be contacted by text or email, and
  - Assigns customers to themselves as a coach (must be in his/her Admin account to complete this task).
- Contact the customers within three (3) working days using the appropriate template for the method of contact.
- Document the contacts by assigning appropriate tags:
  - Contact 1: first attempt to reach the customer.
  - Contact 2: second attempt taken to reach the customer.
  - Contact Closed: after two (2) unsuccessful attempts contact can be closed.
  - Email/Text: select appropriate method used for contact.
  - Assisted: spoke to the customer and provided information or enrolled
  - WIOA Refer:
    - ✓ Customer wants to be enrolled and an appointment was scheduled for a later date for WDT to complete WIOA application, or
    - ✓ Customer is already enrolled and assigned to a WDS.
  - WIOA Enrolled: WDT enrolled customer for WIOA Services and completed the application in CalJOBS.
- Assign customer to a WDS if it is WIOA Refer and/or WIOA Enrolled.

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WDS responsibilities

Once the WDT assigns a customer to the WDS, the WDS can use the San Bernardino County Career Navigator to work with the customer on Career Exploration for training.

WDS will receive a notification when a customer has been assigned, but only if the notification alert is activated.

Note: Refer to the WDD Intranet for User Guide on how to activate the Notification alert and Career Exploration.

Managers/ Supervisors responsibilities

Managers/Supervisors should randomly check to determine if the:

- WDS is utilizing the San Bernardino County Career Navigator platform for customers who want training and will provide Career Exploration, and
- WDT is receiving the reports and completing outreach to the customers who responded yes to wanting to be contacted for additional services.

Business Services

Business Services staff utilizes the San Bernardino County Career Navigator platform for all job fairs, including the monthly AJCC job fairs. All job fair flyer must include the Quick Response (QR) scan for customers to access the platform and register.

User guides

Various user guides were developed to help staff navigate the San Bernardino County Career Navigator platform with:

- Assigning staff to a customer
- Career Exploration (tasks for customers to complete)
- Contact tags (creating and assigning tags to a customer)
- Enable notification alerts
- Outreach reports

Note: User Guides are located on the WDD Intranet>Resources & References>Quick Reference Guides.

Tags

The tags in the San Bernardino County Career Navigator is used to:

- Track new participants who registered into the platform during one of the AJCC's monthly job fairs,
- Document the contact attempts by the WDTs to enroll potential participants, or
- Set tasks for participants to complete.

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Workforce Compass, Continued

Workflows

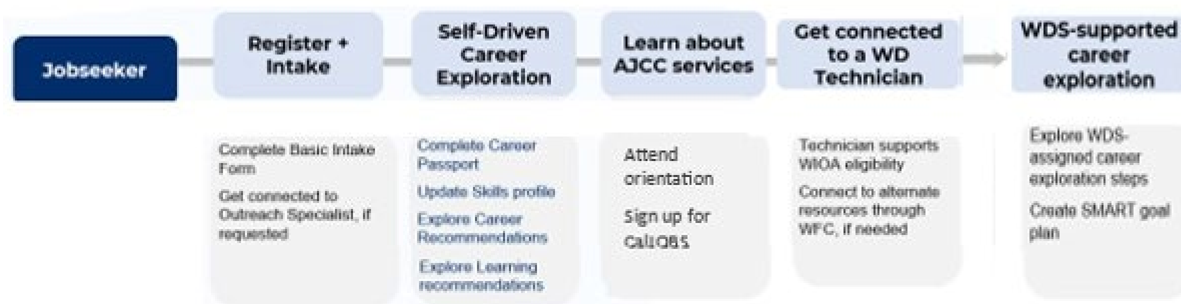
Three (3) workflows are available for staff to assist with the flow working in the Workforce Compass, the:

- Jobseeker,
- WDT, and
- WDS.

<u>Note</u>: The workflows are a general overview of the process; staff will refer to the User Guides for the specific steps needed to be completed.

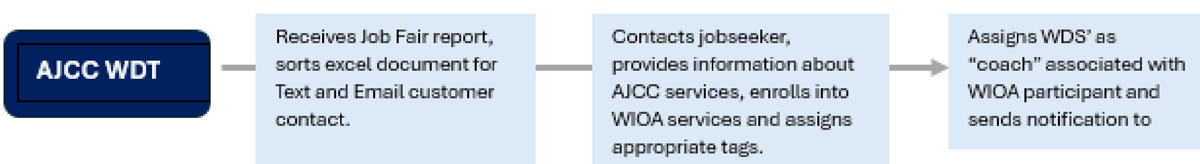
Workflows

The following is the workflow a User could follow within the San Bernardino County Career Navigator platform:



WDT workflow

The following is the workflow the WDT follows within the W San Bernardino County Career Navigator:



WDS workflow

The following is the workflow the WDS follows within the San Bernardino County Career Navigator: