COUNTY OF LOS ANGELES
WIOA ADULT, DISLOCATED WORKER and YOUTH PROGRAMS DIRECTIVE

NUMBER: **WIOA RS 01-2017-REV**	SUBJECT: **CalJOBS Document Imaging Pilot Project**
DATE: **07/21/2016**	EFFECTIVE DATE: **July 21, 2016**

TO: WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) ADULT, DISLOCATED WORKER, AND YOUTH SERVICE PROVIDERS

"This Directive supersedes Directive WIOA RS 01-2017"

PURPOSE

The purpose of this directive is to provide policy and instructions to Los Angeles County America's Job Centers of California (AJCC) Service Providers on document scanning procedures required when using the Document Imaging and Scanning Module in the CalJOBS system. The use of document imaging will take effect on July 1, 2016 through a pilot project with selected AJCCs. Following the completion of the pilot project, all AJCCs will be held to the policies and procedures as described herein, and in any subsequent directive(s), should the policies and procedures change as a result of the outcome of the pilot project.

REFERENCE

- Workforce Services Information Notice (WSIN) 15-7

BACKGROUND

On August 28, 2015, Employment Development Department (EDD) issued an Information Notice (WSIN 15-7) which advised on a new method of collecting and storing supporting documents used for various program verification purposes within the CalJOBS system. This new scanning system will eliminate Participants' need to provide documents multiple times when co-enrolling between programs that are supported in CalJOBS or co-enrolling between different AJCCs. In addition, the use of document imaging will eventually lead to other efficiencies such as a reduction in the reliance on hard copy files and the ability for monitoring of files electronically.

The scanned documents will be stored online in a secure central database. Staff and Supervisor accounts at the pilot sites have been granted access to upload, view and/or download scanned documents. CalJOBS tech Support staff will modify the user ID request form to include a column to request access to the Document Management Module. Privileges will be assigned according to the staff level access to CalJOBS, please see chart below:

Staff Access Level	Privilege
LWIA Partner Supervisor	Upload, View, Search, Edit, Download, and Delete documents
LWIA/CBO Staff	Upload, View, Search, Edit and Download Documents

The scanners have been set-up in the seven (7) Service Providers located within the following American Job Centers of California (AJCCs) that are participating in the pilot project as follows:

American Job Center of California	Service Provider
Compton/South LA AJCC	Community Career Development - Compton
	Community Career Development - So. Central
	Housing Authority of the City of LA (Youth)
East LA AJCC	AYE Catholic Charities (Youth)
	ResCare - East LA
Hub Cities AJCC	Hub Cities - Huntington Park
	Hub Cities - Huntington Park (Youth)

POLICY AND PROCEDURES

The fields within CalJOBS that require document verification, along with their location and description within the WIOA case record, are listed in Attachment A: *CalJOBS Scanned Documents Naming Conventions Revised*. Please note that the standardized document names are set to ensure a consistent naming convention per field. Service Providers shall make sure that they adhere to the naming conventions provided so that all document names follow the format in Attachment A. Service Providers are also required to add tags to be able to locate their own files.

Step by step directions on scanning and uploading documents are outlined in Attachment B: *CalJOBS Help Sheet 9: Document Imaging*. Document management and searching for documents are also highlighted in Attachment B. For the purposes of this pilot project, please keep hard copies of stored images in addition to the scanned verification documents saved within the CalJOBS system. Note that the *electronic* form of confidential information is not be stored outside of the CalJOBS system. While scanning the original document is preferred, scanning legible verified documents provided by Partners may serve as sufficient documentation.

All scanners involved in this pilot project are the property of Community and Senior Services (CSS). All flatbed scanners must remain at their originally installed facility. These scanners cannot be transferred from one facility to another without prior authorization from CSS. In addition, the portable scanners cannot be reallocated to another AJCC or agency outside of its original assignment. Staff must observe the proper care and use of equipment. Furthermore, AJCC Service Providers must inform CSS of any new staff members' use of the scanning equipment.

Los Angeles County AJCC Service Providers that participate in this pilot should ensure that the requirements described herein are communicated throughout operations.

If you have any questions regarding the procedures on scanning documents in CalJOBS or are having technical issues with the scanners, please contact our CalJOBS Tech Support Team, at caljobstechsupport@css.lacounty.gov.

Josie Marquez, Assistant Director
Workforce and Community Services Branch

Attachments:
CalJOBS Scanned Documents Naming Conventions Revised (Attachment A)
CalJOBS Help Sheet 9: Document Imaging (Attachment B)

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CalJOBS Scanned Documents Naming Conventions Revised (Attachment A)

Area	Field	Short Description	Document Naming Format	Note
WIOA Application- Contact Tab	SSN	Social Security Number	SSN LAO	
WIOA Application- Contact Tab	Address on Date of Application	Individual's address	Address LAO	
WIOA Application- Demographics Tab	Date of Birth	Date of birth	DOB LAO	
WIOA Application- Demographics Tab	Registered for Selective Service	Selective Service	SS LAO	
WIOA Application- Demographics Tab	Authorization to Work in US	Authorization to work in the US	Citizen LAO	
WIOA Application- Demographics Tab	Considered to have a disability	Disability	Disability LAO	
WIOA Application- Veteran Tab	Eligible Veteran Status	Veteran status	Vet Stat LAO	
WIOA Application- Employment Tab	Employment Status	Employment status	Emp Stat LAO	
WIOA Application- Employment Tab	Dislocated Worker Category	Dislocated Worker category	DW Cat LAO	
WIOA Application- Employment Tab	Receiving Unemployment Compensation	Is individual receiving unemployment compensation	Unemp LAO	
WIOA Application- Education Tab	Federally Reported Highest School Grade Completed	Highest school grade completed	Schl Grade LAO	
WIOA Application- Education Tab	School Status	Current school status	Schl Stat LAO	
WIOA Application- Education Tab	(WIOA) Attending any School (per state definition)	Attending any school per state definition	Attend Schl LAO	
WIOA Application- Education Tab	Within compulsory school age and did not attend the most recent complete school year calendar quarter	Individual is within compulsory school age but did not attend most recent school year calendar quarter	Comp Schl Age LAO	
WIOA Application- Public Assistance Tab	TANF	TANF	TANF LAO	
WIOA Application- Public Assistance Tab	Supplemental Security Income (SSI)	SSI	SSI LAO	
WIOA Application- Public Assistance Tab	State or Local Income-Based Public Assistance (General Assistance)	General assistance	Gen Assist LAO	
WIOA Application- Public Assistance Tab	Supplemental Nutrition Assistance Program (SNAP)	SNAP	SNAP LAO	
WIOA Application- Public Assistance Tab	Refugee Cash Assistance (RCA)	Refugee Cash Assistance	RCA LAO	
WIOA Application- Public Assistance Tab	Receiving Social Security Disability Insurance Income (SSDI)	SSDI	SSDI LAO	
WIOA Application- Public Assistance Tab	Foster Child (State or local payments are made for applicant)	Payments are made for Foster Child applicant	Foster Pay LAO	
WIOA Application- Public Assistance Tab	Youth currently living in a high-poverty area	Youth currently living in a high-poverty area	Poverty LAO	Staff would need to upload a screenshot of the map (Youth)
WIOA Application- Public Assistance Tab	Youth currently receives, or is eligible to receive, free or reduced lunch	Youth currently receives, or is eligible to receive, free or reduced lunch	Lunch LAO	
WIOA Application- Barriers Tab	English language learner	ESL learner	ESL LAO	
WIOA Application- Barriers Tab	Basic Skills Deficient/Low Levels of Literacy	Basic skills deficient	BSD LAO	
WIOA Application- Barriers Tab	Homeless	Homeless	Homeless LAO	
WIOA Application- Barriers Tab	Runaway	Runaway youth	Runaway LAO	
WIOA Application- Barriers Tab	Youth in, or aged out of, Foster Care	Youth in, or aged out of, Foster Care	Foster Care LAO	
WIOA Application- Barriers Tab	Ex-Offender - individual has been arrested/convicted of a crime	Individual has been arrested/convicted of a crime	Exoff LAO	

CalJOBS Scanned Documents Naming Conventions Revised (Attachment A)

Area	Field	Short Description	Document Naming Format	Note
WIOA Application- Barriers Tab	Pregnant/Parenting youth	Pregnant/Parenting youth	Parent Yth LAO	
WIOA Application- Barriers Tab	Youth Requires Additional Assistance to complete an educational program or to secure/hold employment	Youth Requires Additional Assistance to complete an educational program or to secure/hold employment	Yth Add Assist LAO	
WIOA Application- Barriers Tab	Out-of-Home Placement	Individual is out-of-home	Out of Home LAO	
WIOA Application- Barriers Tab	Eligible under Section 477 of the Social Security Act	Eligible under Section 477 of the Social Security Act	Section 477 LAO	
WIOA Application- Barriers Tab	Displaced Homemaker	Displaced Homemaker	Homemaker LAO	
WIOA Application- Barriers Tab	Within 2 years of exhausting TANF lifetime eligibility	Is individual within 2 years of exhausting TANF lifetime eligibility	TANF Life Exhaust LAO	
WIOA Application- Family Income Tab	Family Size	Family size	Fam Size LAO	
WIOA Application- Family Income Tab	Annualized Family Income	Annualized family income	Fam Income LAO	
Participation	Employment Status at Participation	Employment status at participation	Emp Stat Part LAO	
Participation	UC/UI Status	Unemployment Compensation/Unemployment Insurance status at participation	UCUI Stat LAO	
Participation	School Status at Participation	School status at participation	Schl Stat Part LAO	
Activity	Credential Type- Credential Verification	Verification of credential type for activity 300	Credential Ver LAO	
Activity	School Status on Last Day of Service- School Status Verification	School Status on Last Day of Service- School Status Verification	Schl Stat Ver LAO	
Measurable Skills Gains	Type of Achievement	Type of achievement acquired based on the skill type	Achvmt LAO	
Case Closure	Credential Attainment	Credential attainment	Credential Closure LAO	
Case Closure	School Status at Exit	School status at exit	Schl Stat Closure LAO	
Case Closure	Attained Diploma, GED/High School Equivalency Diploma or Certificate	Attained Diploma, GED/High School Equivalency Diploma or Certificate	Certificate Closure LAO	
Case Closure	Youth Placement at Exit- Placement Date	Youth Placement at Exit- Placement Date	Place Closure LAO	
Case Closure	Employer Name	Employer name	Emp Closure LAO	
Follow Ups	Employer Name	Employer name	Emp FU LAO	
Follow Ups	Current Credential	Current credential at follow up	Credential FU LAO	
Follow Ups	Current Placement (WIA)	Current placement at follow up (Youth, WIA)	Yth WIA Place FU LAO	
Follow Ups	Current Placement (WIOA)	Current placement at follow up (Youth, WIOA)	Yth WIOA Place FU LAO	
Follow Ups	Attained Diploma, GED/High School Equivalency Diploma or Certificate (Not previously recorded)	Attained Diploma, GED/High School Equivalency Diploma or Certificate (Not previously recorded)	Certificate FU LAO	
Case Notes	Document Attachment	Any type of document attachment for the case note	(Attachment Name) CaseNote LAO	Any document being attached to the case note

CalJOBS Help Sheet 9

Document Imaging

Prepared by: Research and Statistics Division

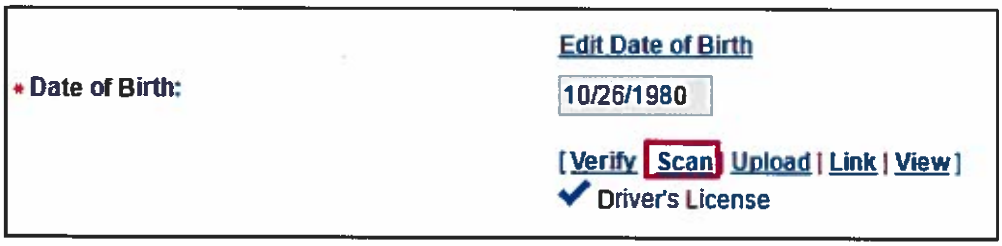
Document Imaging in CalJOBS

The Document Imaging Module enables staff to scan and upload any type of document into CalJOBS.

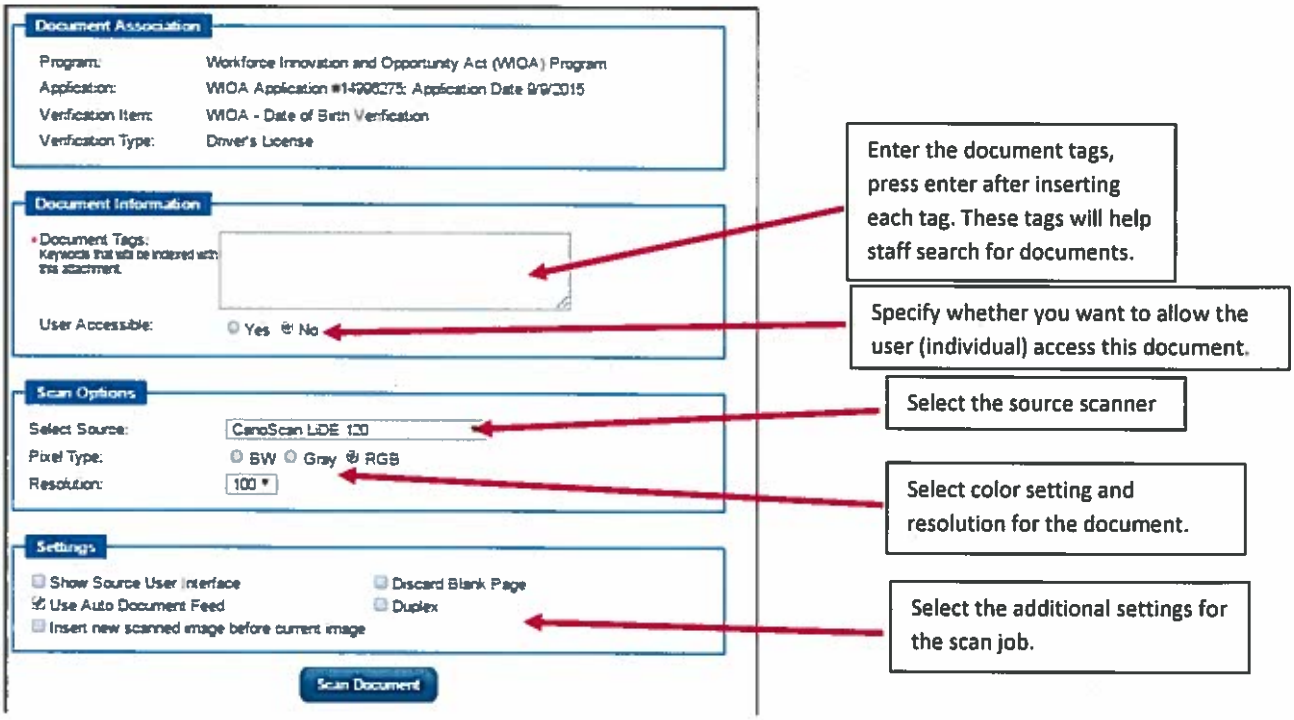
This section describes step by step how to scan and upload documents in CalJOBS. There are two options in which staff can scan and upload documents directly to CalJOBS:

Option 1: While completing any type of form (i.e. WIOA Application)

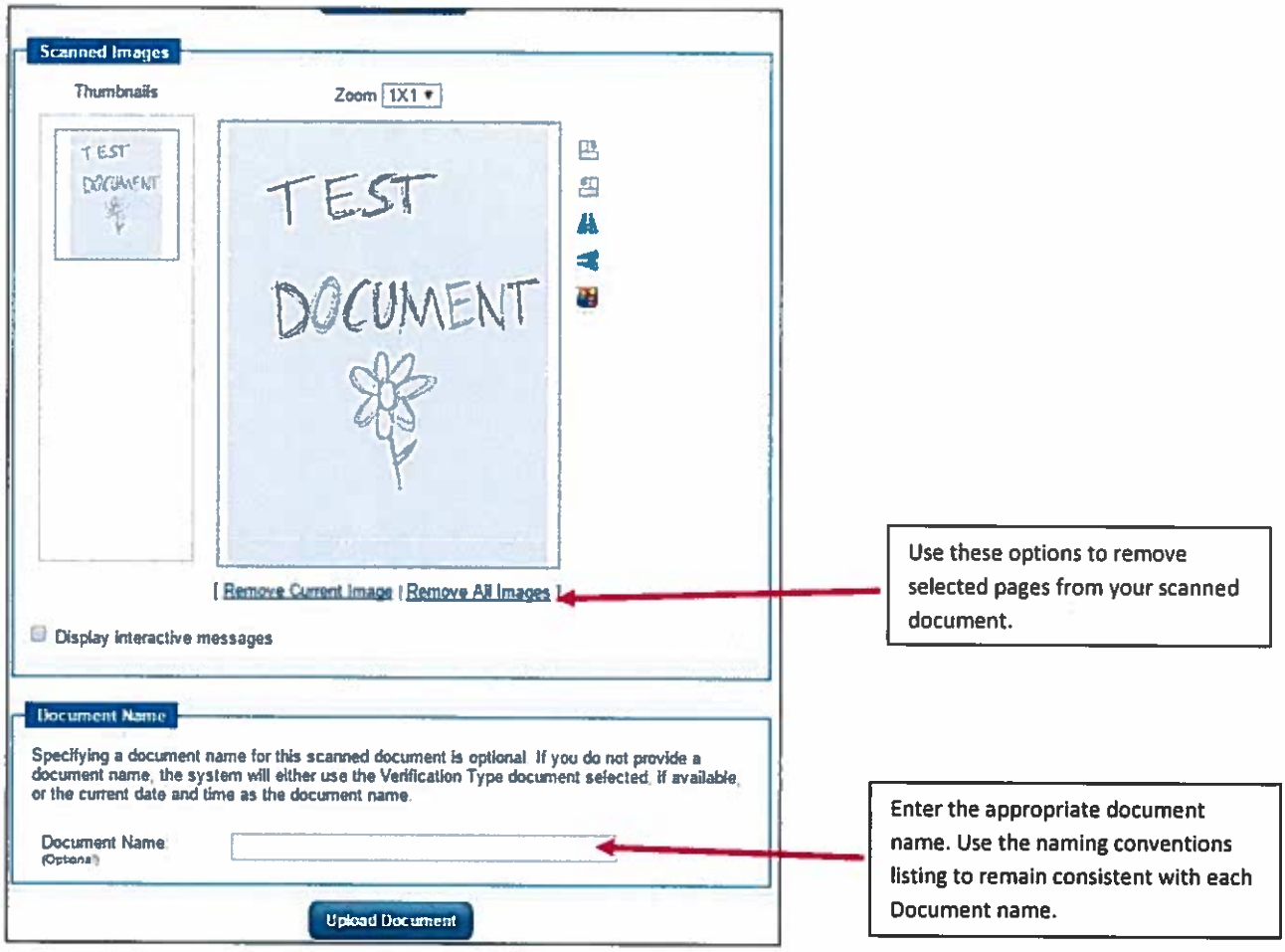
When completing a form like the WIOA application, you will notice many fields in which the "Verify" link is presented as an option. CalJOBS allows staff to scan and upload documentation by using the "Scan" link in these areas. See image below:



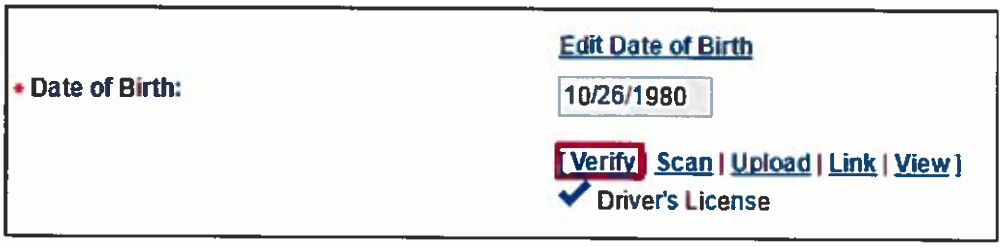
To use this function, simply click on the Scan link. CalJOBS will then show the following screen:



Once you enter the information above, click on the Scan Document button. CalJOBS will then generate a preview and a thumbnail of the newly scanned document.



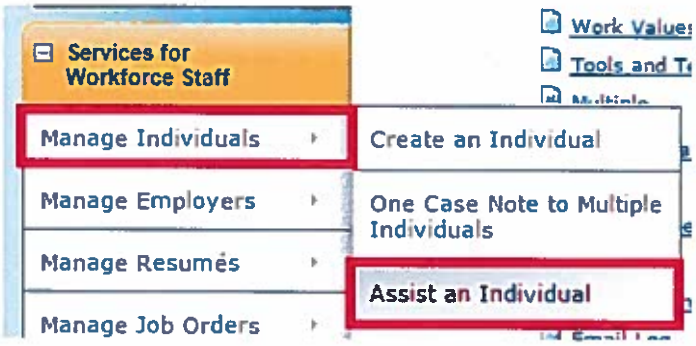
After you are satisfied with your scan job, click on the Upload Document button. Your scanned document will now be uploaded to CalJOBS. Once this is done, make sure to select the type of documentation being verified by clicking on the Verify link.



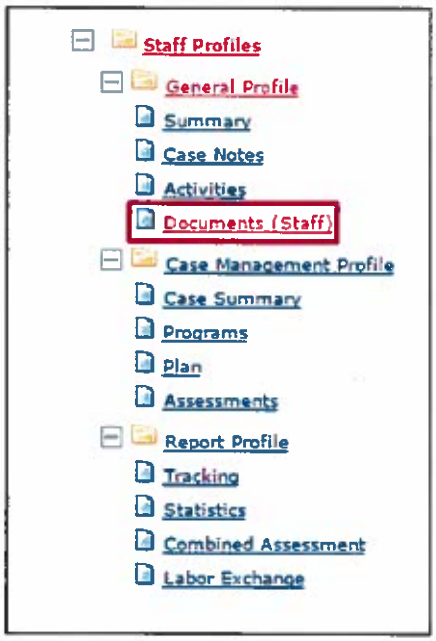
Option 2: By going to the Documents (Staff) section under Staff Profiles

1. Log in to CalJOBS using the account provided by the LA County CalJOBS tech support staff.

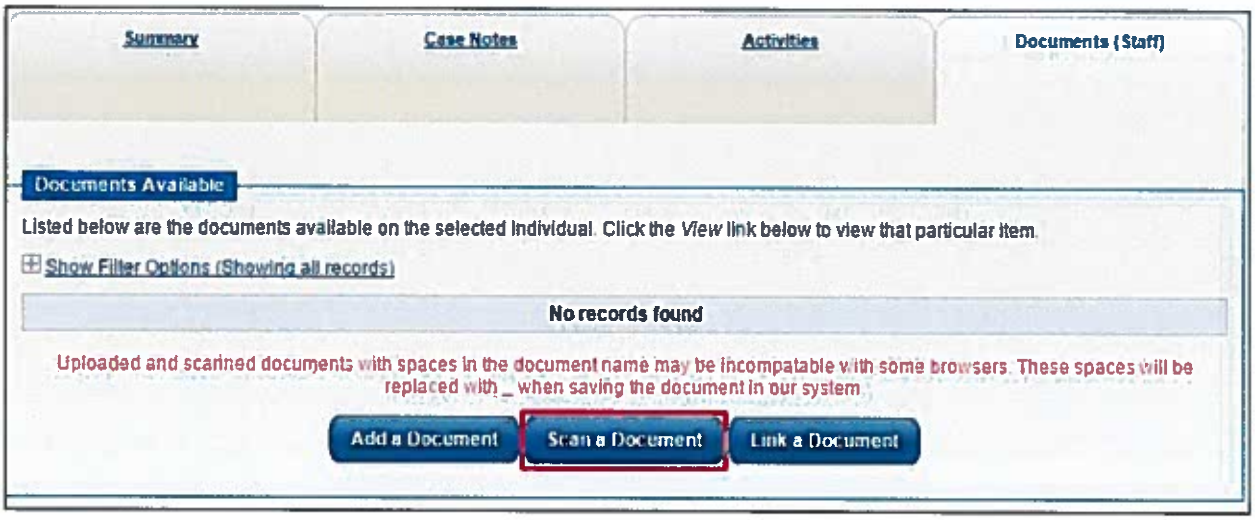
2. Locate your participant by navigating to "Manage Individuals", then click Assist an Individual under the Services for Workforce Staff tab in the left navigation panel.



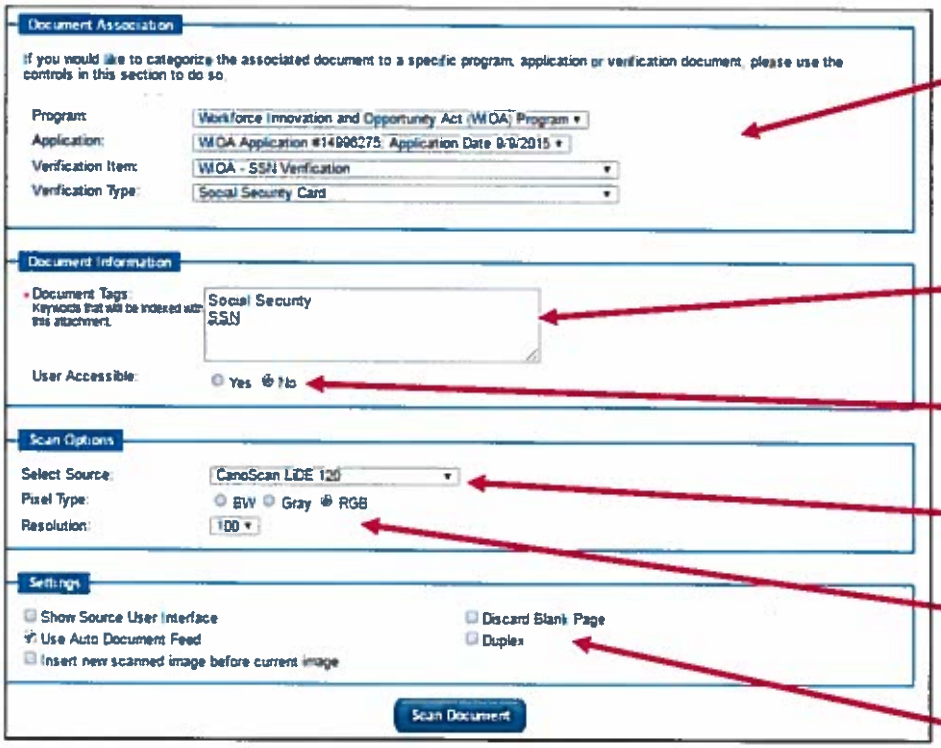
3. Once you locate your individual, click on the Documents (Staff) link under Staff Profiles/General Profile in the Staff Portfolio section located on top of the page.



4. To scan a new document, click on the Scan Document button at the bottom of the page.



5. CalJOBS will display the following form:



Complete the Document Association section by selecting the appropriate choices from the dropdowns.

Enter the document tags, press enter after inserting each tag. These tags will help staff search for documents.

Specify whether you want to allow the user (individual) access to this document.

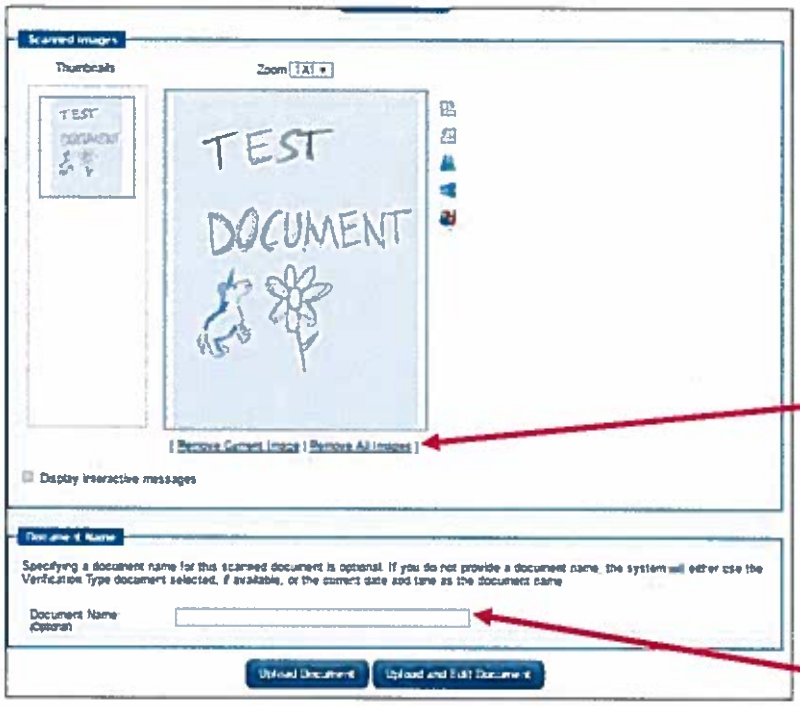
Select the source scanner

Select color setting and resolution for the document.

Select the additional settings for the scan job.

Once you make your selections, click on the "Scan Document" button.

6. CalJOBS will generate a preview and thumbnail of the document.



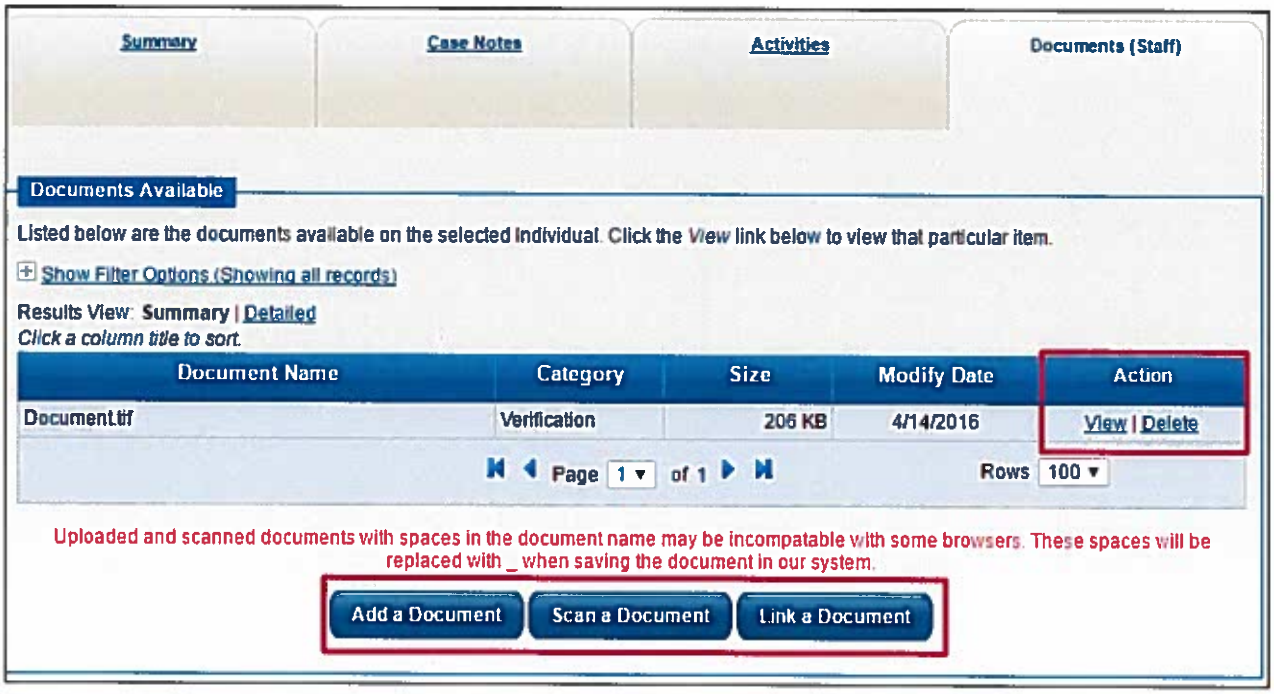
Use these options to remove selected pages from your scan job.

Enter the appropriate document name. Use the naming conventions listing to remain consistent with each Document name.

If you are satisfied with your scan job, click on the "Upload Document" button. If not, you may click on the "Upload and Edit Document" button to upload the file and edit the document (i.e. crop, rotate, resize, etc.).

Document Management

When staff scan and upload documents in CalJOBS, those documents can be found in the "Documents (Staff)" section. CalJOBS allows staff to manage these files.



Use this link to view, edit, and download the document.

Use this link to delete the document.

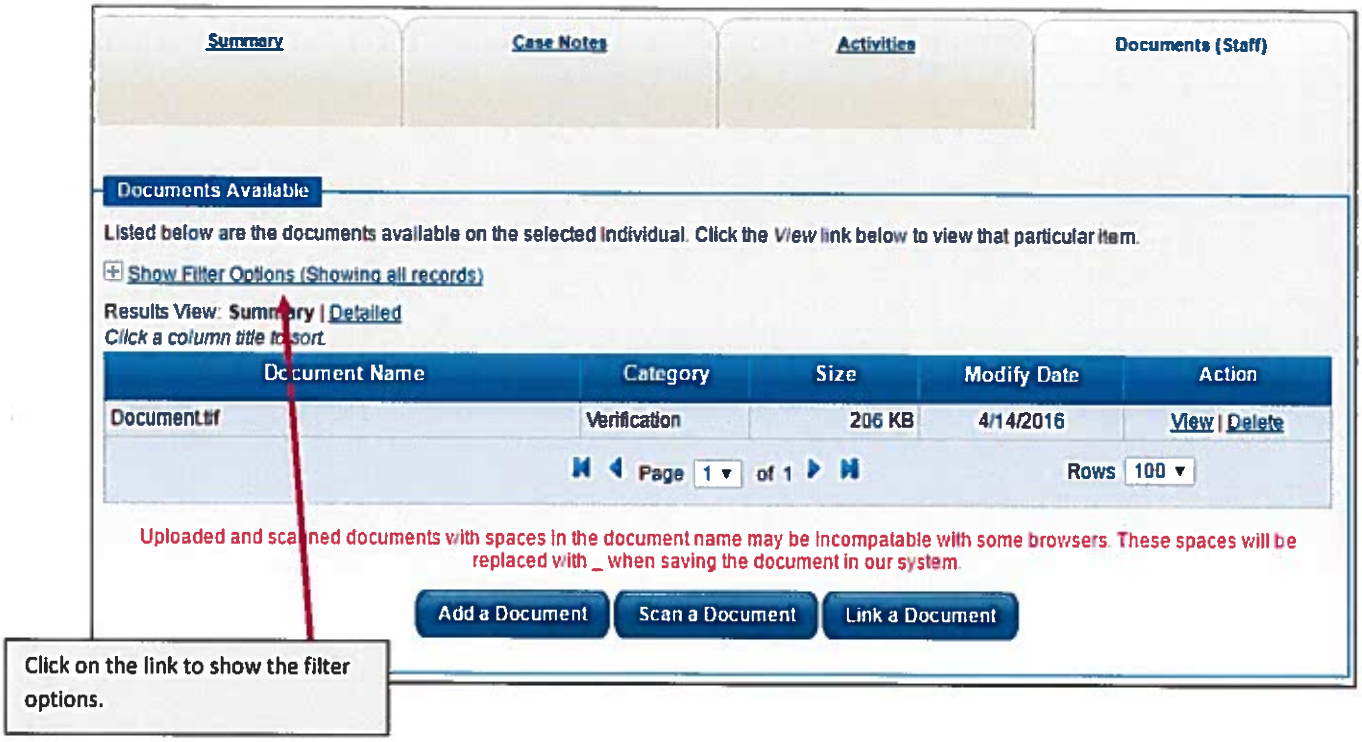
This button allows the user to upload a file stored on the PC.

Click here to scan a new document.

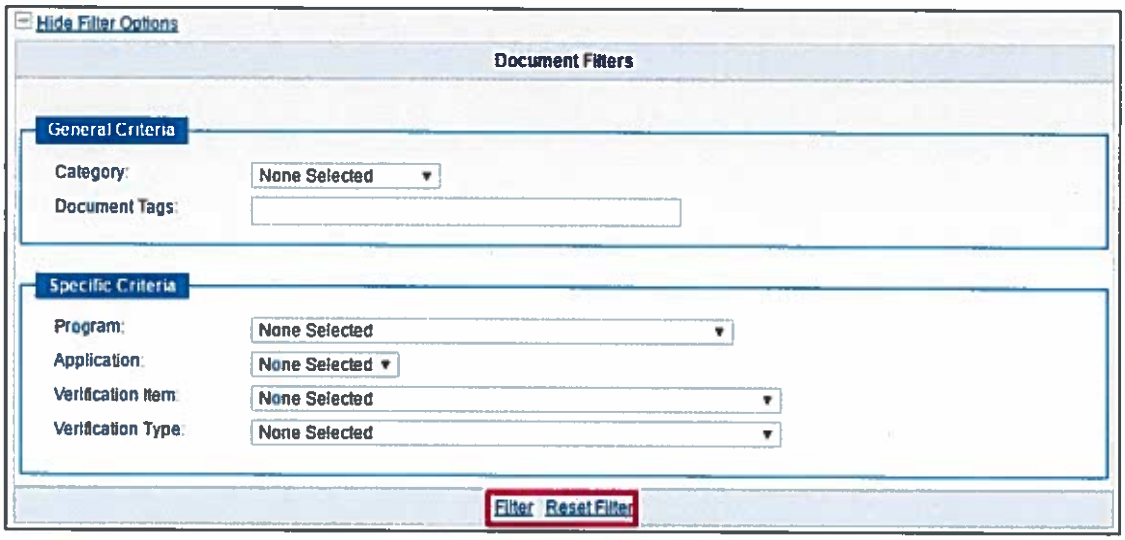
This button allows the user to associate an existing document with another type of verification.

Searching for Documents

CalJOBS allows staff to search for uploaded documents for a particular participant case file. Simply locate your desired participant case file and go to the "Documents (Staff)" area located under Staff Profile/General Profile.



Enter the desired filters for your search and click on the "Filter" link at the bottom. To reset your search, click on the "Reset Filter" link.



Important note: *In order to be able to scan documents in CalJOBS, your IT department must download the proper set-up for the hardware to work with the website.*