

**OPERATIONS MANUAL CHAPTER 11:
BUSINESS SERVICES POLICY AND PROCEDURES**
Revised July 2023

TABLE OF CONTENTS

I. Introduction	3
II. Partner Portal	3
A. Scope	3
B. Licensing	3
C. Active Accounts (Businesses)	3
D. Job Postings	4
E. Career Portal (Job Seeker Enrollment)	4
1. Dual-Enrollments	4
2. Career Portal Enrollment	4
3. Reserving Jobs For Enrolled Candidates	4
F. Chatter	5
1. Home Page Chatter Feed	5
2. Record Chatter Feed	5
G. Match Records	5
1. Job Seeker Match	5
2. Partner Match	5
H. Match Approval Process	5
I. Hire Records	6
III. Business Engagement Data	6
A. Services	6
B. Business Services Performance Tracking Requirements	7
IV. Technical Assistance	7
V. Attachments	7

I. INTRODUCTION

The purpose of this chapter is to provide direction and requirements to San Diego Workforce Partnership (Workforce Partnership) subrecipients on data entry policies and procedures for Business Services. The goal is for Workforce Partnership subrecipients to provide a coordinated approach and consistent, high-quality experience to business customers in San Diego County.

II. PARTNER PORTAL

A. SCOPE

The system of record for all business services activities performed by the subrecipient will be the Partner Portal Salesforce Platform, developed and maintained by the Workforce Partnership. All business services activities, outreach, internal job postings, matches, and other relevant data input elements will be recorded by the subrecipient in the Partner Portal within one business day of the activity taking place.

Subrecipients must adhere to the provisions and guidelines as outlined. Failure to make good-faith efforts to use this system of record and follow operations manual guidelines may result in corrective action. Subrecipients must agree to the [Terms of Agreement](#).

B. LICENSING

All subrecipient staff who participate in the employment placement process (e.g., case managers, career agents, business services representatives (BSR), hybrid roles, special projects) should request a Partner Portal License within their first week of employment. Requests are made from the [Partner Portal home page](#).

Subrecipients are responsible for submitting a request to deactivate license upon separation with the employee. Requests to deactivate accounts should be submitted to business@workforce.org.

C. ACTIVE ACCOUNTS (BUSINESSES)

An Active Account is a relationship with a business, measured by ongoing reciprocated communication between a BSR and business partner (NOT a recruitment agency, not a third-party, etc.). Reciprocation can occur through different types of communication (e.g., face-to-face, over the phone, email, etc.). However, “cold” calling, mailing a letter, or emailing a customer does not qualify as an Active Account unless the individual returns the call, responds to the letter or email, or visits the subrecipient and acknowledges the correspondence.

A BSR should enter their Active Accounts in the Partner Portal, and/or assign themselves as an account owner within one business day of establishing the relationship. If the account is already active in the Partner Portal, the BSR should inform the other account owner(s) of their partnership and coordinate to deliver a cohesive customer experience.

An account may have multiple account owners. When a business chooses to source an eligible candidate for a subsidized opportunity, the respective job owner will take priority and own the job posting. For example: KRA job owners will take priority for On-the-Job Training positions. A Workforce Partnership job owner will take priority for TechHire opportunities.

For detailed instructions on how to create an active account, refer to **PARTNER PORTAL USER GUIDE**.

D. JOB POSTINGS

The BSR will aim to develop a referral process with each Active Account, to post jobs and refer candidates to the business account. The BSR shall post each job opening in the Partner Portal within one business day of receiving the job order from their business partner. The person who posts the job is assigned as the job owner. Should a job posting already exist for a BSR's active account, the BSR shall coordinate with the existing job owner to deliver a cohesive customer experience to the business partner.

A job posting shall be posted with an application deadline set in 14 days, unless otherwise expressed by the business. When the application deadline lapses, the job will automatically be removed from the portal. The BSR shall confirm that the opportunity is still active before re-posting to the portal. If the job is no longer active, BSR shall update the status to "closed."

The job owners are responsible for keeping their job postings accurate and the job status current. For detailed instructions on how to post a job, refer to **PARTNER PORTAL USER GUIDE**.

E. CAREER PORTAL (JOB SEEKER ENROLLMENT)

The Partner Portal allows subrecipient staff and job seekers to review developed jobs on a shared job board.

1. Dual-Enrollments

Job Seekers may be dually enrolled in WIOA and Workforce Partnership Direct Services Programs. A Workforce Partnership Case Manager will default as the assigned approver for Match Records created by dually enrolled clients in the Career Portal. Please refer to Chapter 7. Part 1 and 2 for the Dual-enrollment process.

2. Career Portal Enrollment

Upon enrollment, the subrecipient staff shall create an account for their job seeker. Job seeker(s) can access the Career Portal for self-guided job search, and request to be considered for developed opportunities in the Partner Portal. For detailed instructions on how to give access to job seekers, refer to **PARTNER PORTAL USER GUIDE**.

3. Reserving Jobs for Enrolled Candidates

Subrecipient BSR's have an option to limit viewability of their jobs to only their organization and the job seekers they manage. The BSR can reserve the job for three (3), five (5), or seven (7) days. After this duration passes, the job will be viewable by all job seekers in the Partner Portal.

To ensure that only WIOA-eligible clients can view a job meant for a subsidized opportunity (e.g., On-the-Job Training) the BSR may also reserve the job for an unlimited duration.

F. CHATTER

Chatter is a communication function that allows a user to tag people and records when making comments.

A Chatter feed is a window that displays Chatter comments, with the most recent comments at the top. Chatter feeds are sortable, filterable, and searchable, providing easy access to whichever updates are most important to the user. There are two types of Chatter feeds in the Partner Portal:

1. Home Page Chatter Feed

This has updates on records and comments that the user is tagged in. Other members of the Partner Portal will only see these updates if they are tagged in the comment or “following” the user.

2. Record Chatter Feed

Any Chatter feed that is located on a record (e.g., Job, Event, Match, etc.). A comment on this type of Chatter feed will automatically be linked to the record it is associated with. All Partner Portal users can view Chatter feeds on records they have access to.

For detailed instructions on how use the Chatter feature, refer to **PARTNER PORTAL USER GUIDE**.

G. MATCH RECORDS

A “Match Record” is a record in Salesforce that indicates that a job seeker and a job are a potential Match. Match Records can be created two ways:

1. Job Seeker Match

Job seekers with a Career Portal account can view the job board and self-select as interested in the position. This creates a Match Record to indicate that the job seeker may be a good fit, and Case Manager should review for approval.

2. Partner Match

Subrecipients shall regularly review job postings in the Partner Portal and make referrals for qualified job-ready candidates. A referral in the Partner Portal creates a Match Record. For detailed instructions on what to include in a Match Record, see **COMPONENTS OF AN IDEAL MATCH RECORD**.

H. MATCH APPROVAL PROCESS

The job owner and the case manager are assigned as approvers in the Match Approval Process. Both approvers are notified within the system and via an automated email notification. The job owner is responsible for communicating with the business customer, and the case manager is responsible for communicating with the job seeking customer throughout the process.

Each actor must review and approve the candidate if they look to be a good match to the job posting. When both the case manager and the job owner have deemed the match to be a good fit, they individually approve the Match Record, and the status is auto updated to “Waiting to Hear Results.” The BSR is responsible for acting on all Match Records related to their open job

posting within one business day (i.e., refer the candidate to the employer or send the Match back to case manager for edits).

The job owner will then refer the candidate to their business partner. The business may reach out to the candidate directly to schedule an interview or may rely on the job owner as an intermediary. The job owner should chat with the case manager to support with coordinating an interview as appropriate.

The job owner and the case manager should follow up with their business and job seeking customers, respectively, to learn if candidates in "Waiting to Hear Results" statuses have been interviewed and/or hired.

Either approver may indicate on the Match card if an interview was granted.

If the candidate was hired, either actor may approve the Match to auto-create a hire record.

For an overview of the Match approval process, refer to [MATCH PROCESS MAP](#)

For detailed instructions on how to navigate the Match approval process, refer to [PARTNER PORTAL USER GUIDE](#)

I. HIRE RECORDS

If either the case manager or job owner learns that the candidate has been hired for the position, they should approve the Match to move the stage from "Waiting to Hear Results" to "Hired" and automatically create a Hire Record.

Both the job owner and the case manager are notified in the system and via email that a hire record was created. They are each prompted to update the hire record with relevant information such as start date and wage.

All hires related to jobs in the Partner Portal shall be recorded via a Hire Record within one (1) business day of learning of the hire. See Match Process Above.

III. BUSINESS ENGAGEMENT DATA

A. SERVICES

A service (also known as a service type or service intervention) is a data element documenting progress toward an outcome or service offering. A service should benefit an employer: what did the partner gain from participating/receiving the service (i.e., receiving/submitted paperwork from the business is not a service).

All services must be tracked by establishment. An establishment is considered one physical location and predominantly one economic activity.

For a complete list of services and definitions, refer to [EFFECTIVENESS IN SERVING EMPLOYERS DATA TEMPLATE](#).

B. BUSINESS SERVICES PERFORMANCE TRACKING REQUIREMENTS

Subrecipients must submit a quarterly report of recorded business services activities in **EFFECTIVENESS IN SERVING EMPLOYERS DATA TEMPLATE**.

This report is to be downloaded from the attachment below and then submit the excel document to business@workforce.org every quarter by the 15th of the month following the quarter end (i.e., for Q1, July through September, this report should be uploaded by October 15).

Any questions about this report can be sent to business@workforce.org. For more details, refer to **EFFECTIVENESS IN SERVING EMPLOYERS DATA TEMPLATE**

IV. TECHNICAL ASSISTANCE

The Workforce Partnership will provide ongoing technical assistance for the Partner Portal Salesforce Platform.

For questions about business process or procedures, email business@workforce.org

To report a technical error, email SalesforceSupport@workforce.org

V. ATTACHMENTS

[Components of an Ideal Match Record](#)

[Effectiveness in Serving Employers Data Template](#)

[Match Process Map](#)

[Partner Portal User Guide](#)