TRANSITIONAL JOB POLICY AND PROCEDURES

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I. INTRODUCTION

The Workforce Innovation and Opportunity Act (WIOA) (Pub. L. 113-128) is a transformative law designed to strengthen our nation's public workforce system, helping Americans, particularly youth and those with barriers to employment, access the education, training, and support services they need to obtain and advance in quality jobs and careers, and to help businesses hire and retain the skilled workers they need to succeed in a global economy. WIOA ensures that the needs of businesses and workers drive workforce solutions, and it increases and aligns coordination among key employment, education, and training programs.

Work-based learning activities involve building worker skills and establishing pathways to higher wages and career opportunities. Work-based learning strategies emphasize business engagement, incorporate training objectives while job-seeking participants are working, and lead to unsubsidized employment. A key advantage of work-based learning is that job seekers and participants can “earn while they learn” and achieve improved employment and earnings outcomes.

Local boards may use up to 10 percent of their combined total allocation of adult and dislocated worker funds to support transitional jobs.

II. PURPOSE OF TRANSITONAL JOB SERVICES

Transitional jobs (TJ) are a type of work-experience local workforce development boards can offer as an individualized career service under WIOA. Transitional jobs are time-limited, wage-paid work experiences that are subsidized up to 100 percent. These jobs can be in the public, private, or nonprofit sectors and are only available for individuals with barriers to employment who are chronically unemployed or who have an inconsistent work history, as determined by the local board. Transitional jobs provide individuals with work experience and an opportunity to develop important workplace skills within the context of an employee-employer relationship, in which the program provider generally acts as the employer, and with an opportunity to develop important workplace skills.

1. Transitional Job requirements:

- Must be combined with comprehensive career and supportive services.
- Must be designed to establish a work history for the individual, demonstrate success in the workplace, and develop the skills that lead to entry into and retention in unsubsidized employment.
- Unlike on-the-job training (TJ), with transitional jobs the training provider may be the employer of record and there is no requirement that the employer retains the individual upon completion of the transitional job, however, job retention is an ideal outcome.

III. TRANSITIONAL JOB POLICIES AND PROCEDURES

The San Diego Workforce Partnership may use up to 10 percent of their combined total allocation of adult and dislocated worker funds to support transitional jobs.

A. TRANSITIONAL JOBS POLICIES

1. **Part time vs. Full time:**
   Transitional Jobs may be full-time or part-time employment.
2. **Duration**: A Transitional Job relationship may be established for a duration of up to and not to exceed one year as determined applicable to the degree of barriers to employment, and additional factor’s which should play a part in the decision-making process, as relevant to include:
   - The type of employers to be served as TJ sites, their needs and the time needed to establish an applicable work history

- Level of current Job skills upon entry and the level needed to generate a positive outcome
- The need and type of program support and or access to career and supportive services that will be needed during the TJ relationship.
- Program staff may provide eligible Transitional Jobs program participants Support Services as identified allowable within the local Support Services Policy and Procedure.
    - Example: 1,040 hours x hourly wage x reimbursement rate = amount of reimbursement
    - Only hours worked and trained on the job shall be reimbursed. Vacations, holidays, sick leave, personal leave, union dues, jury duty, commissions, bonuses, and overtime compensation for work in excess of the maximum hours per week authorized by law will not be reimbursed.

3. **Funding Limits:**
    - Up to **90%** of the participants wages, for the extraordinary costs of providing the training and additional supervision related to the TJ.
    - In limited circumstances, the reimbursement may be up to **100%** of the participants wages upon approval of the Manager of Training Services.
4. **Wage Requirement:**
   TJ should strive to meet the Workforce Partnership's approved target self-sufficiency wage as determined by the Workforce Partnership; however, a TJ must pay the current minimum wage as dictated by the state of California.

B. EMPLOYER PRE-SCREENING FOR TJ

TJ is provided under an agreement with an employer in the public, private non-profit, or private sector. Prior to entering into a TJ agreement, a pre-screening should be conducted to ensure that the employer meets the minimum standards and can provide both training and employment to a TJ participant. If additional training is needed, Business Services should ensure that a third-party training provider is included in the agreement.

1. Employer checklist must include at a minimum:

- The employer is a valid company in the State of California
    - The BSR must check the business entity's status on the Secretary of State's webpage.sos.ca.gov
    - The BSR must check that the employer is not debarred or suspended www.sam.gov Click the "Search Records" button
- The business has not exhibited a pattern of failing to provide participants with continued employment;[1]
- The business verifies WIOA funds will **not** be used to relocate operations in whole or in part[2];
- The business has operated at its current location for at least 120 days. If less than 120 days and the business relocated from another area in the U.S and individual(s)/employees were not laid off at the previous location as a result of the relocation;[3]
- The business is not utilizing TJ participants to fill job openings as a result of a labor dispute;[4]
- TJ funds will not be used to directly or indirectly assist, promote, or deter union organizing;[5]
- The TJ will not result in the full or partial displacement of employed workers;[6]
- Participant wages to be paid are:[7]

[1] 20 CFR 680.700(b)
[2] 20 CFR 683.260(a)(1)
[3] 20 CFR 683.260(a)(2)
[4] 20 CFR 680.840
[5] 20 CFR 680.830
[6] 20 CFR 683.270

    - At the same rate, including periodic increases, as other participants or employees who are similarly situated in comparable occupations with the same employer, and who have equivalent training, experience, and skills;
    - In any event, no less than the higher of the rate specified in section 6(a)(1) of the Fair Labor Standards Act of 1938 (29 U.S.C. 206(a)(1) or the applicable Federal, State, or local minimum wage;
- Participants must be provided benefits (*e.g.*, workers' compensation, health insurance, unemployment insurance, retirement benefits) at the same level and to the same extent as other participants or employees working a similar length of time and doing the same type of work;[8]
- The employer will comply with the non-discrimination and equal opportunity provisions of WIOA law and regulations.[9]

2. Equal Opportunity

Training provider must comply with all Equal Opportunity (EO) Policies and Procedures as outlined in **Chapter 9: Nondiscrimination & Equal Opportunity Policy and Complaint Procedures**. This includes compliance with grievance and criminal activity reporting requirements. Training Provider may be monitored by SDWP or a third-party monitor each year and must complete **ATTACHMENT - EO WIOA SECTION 188 COMPLIANCE CHECKLIST** found in **Chapter 8: Monitoring** during each annual review period.

3. Conflict Of Interest

No grantee, contractor, sub-grantee, or sub-contractor will engage in any conflict of interest, real, implied, or apparent, in the selection, award or administration of a WIOA funded contract or grant. TJ Contracting must be conducted by training professionals and Employers in a manner that is objective and independent of personal interests.

A TJ-related conflict of interest can arise in several ways:

a) The business owner or the trainee's direct supervisor is a member of the trainee's immediate family. In this instance, it is not advisable to approve the training plan;
b) The business owner or the trainee's direct supervisor is a member of a WIOA staff person's immediate family. In this instance, the WIOA staff person should declare the conflict in writing and should have no involvement with the execution, oversight, reimbursement or monitoring of the TJ contract or related training plans;
c) A WIOA participant receiving TJ may be a member of a WIOA-funded staff person's immediate family. In this case, refer to the above-cited policy letter. It is impermissible for a publicly funded employee to favor or appear to favor a family member;
d) Similar issues arise when a close relationship exists between the trainee, an employer, the trainee's direct supervisor or a WIOA-funded staff person. The close relationship could be a "significant other" or a business partner. These types of close relationships are hard to define precisely. The key is to preserve public trust and to avoid the appearance of favoritism. When in doubt, declare the conflict to your supervisor and handle the situation in a way that removes any hint of favoritism,

[7] 20 CFR 683.275(a)
[8] 20 CFR 683.275(c); 20 CFR 683.280(b), 20 CFR 680.700(b)
[9] 20 CFR 683.285

C. TRANSITOINAL JOB PARTICIPANT ELIGIBILITY

Under the WIOA there are two levels of services: Basic and Individualized services. A determination that a participant needs individualized and/or training services can be made without regard to how long the individual has been receiving services at each level. Participants in Adult programs must meet eligibility requirements, before being provided training services. Eligibility for services is found in **Chapter 7. Part 1: WIOA Title I Adult Program Eligibility**.

The participant has barriers to employment, is chronically unemployed, or has an inconsistent work history, and has needs to be placed in subsidized, time-limited work within the public, private, or nonprofit sector. The participant must concurrently receive comprehensive employment and supportive services. Transitional jobs are designed to assist participants with establishing a work history, demonstrate success in the workplace, and develop the skills that lead to entry into and retention in unsubsidized employment.

1. Target Populations

- Long-term unemployed
- Ex-offenders
- Individuals who are currently receiving or have exhausted TANF benefits
- Individuals with disabilities

D. CAREER ASSESMENT

The Career Navigator shall guide the participant with conducting the following prior to approving a TJ service.

Career Assessment and Training Research Process

1. The participant shall create a profile on Career Coach and complete the career assessment to explore local careers and educational programs that match their assessment results and interests. The Career Navigator shall attach the participants results to CalJOBS activity code 204 (Interest and Aptitude Testing).

2. The Career Navigator will enter one of the following standalone case notes in CalJOBS:
   a. If the participant is completing a TJ as a new hire and is NOT a reverse referral, please enter the following:

> Subject line: Career Assessment
> Content: The participant completed [**Name of Assessment**] and researched [**Name of Occupation**]. The participant is a good fit for the training because [list how the assessment results support the training program]. The participant meets all requirements for this training and is eligible to begin.

E. TJ SETUP

The Business Service Representative (BSR) shall be responsible for the following to ensure the employer and the occupation are entered into CalJOBS and that the training agreement has been assigned prior to submitting the training agreement.

1. REQUEST TJ AGREEMENT NUMBER

Once a TJ opportunity has been identified for the participant, an agreement number shall be requested from the Workforce Partnership's finance department.

The following shall be used to assign Training Agreement numbers:

- Region Code (1 digit) + Funding Code (1 digit) + Employer ID (4 digits) + sequence (3 digits)

Region Codes	***Funding Codes***
E *- East*	***A*** *- Adult*
M *- Metro*	***D*** *- Dislocated Worker*
N *- North*	*Special Grants TBD*
S *- South*	

Example Agreement Number: EA-1234-001

New TJ Employers
For new employers, an employer ID shall be requested from the Business Service Representative via email to newvendorsetup@workforce.org by sending a completed ATTACHMENT – NEW VENDOR REQUEST FORM, found in ***Chapter 6. Financial Management***. Please allow up to three (3) business days to receive a new employer ID.

A new vendor request MUST include the following:

- ATTACHMENT – NEW VENDOR REQUEST FORM;
- W9; and
- Attachment - EO WIOA Section 188 EEO Compliance checklist, found in the Workforce Partnership's Operations Manual, Chapter 8. Oversight and Monitoring.

Existing TJ Employers
For existing employers, the Business Service Representative must request a new agreement number via email to newvendorsetup@workforce.org (what to include in email) Please allow up to two (2) business days to receive a new agreement number. Attachment - EO WIOA Section 188 EEO Compliance checklist is **required once per program year (July – June).**

2. CREATE A PROVIDER PROFILE IN CALJOBS

The Business Service Representative is responsible for creating a profile for the employer in CalJOBS prior to the training start date.

Create a Provider Profile for the Employer in CalJOBS

a) Search for Existing Provider (Employer)

The Business Service Representative is responsible for the following:

- Log into CalJOBS with your provider access
- Select **Manage Providers** from the **Services for Workforce Staff** section of the navigational menu
- Select **Assist a Provider**
- Using the **Provider Name 1** field, search the name of the employer
  - Complete a thorough search to verify if the employer already exists prior to creating new provider profile

If the provider (employer) is found there is no need to create a provider profile. If the provider (employer) is not found follow the next steps to create a provider profile.

b) Create a New Provider Profile (Employer Information) – if applicable

The Business Service Representative is responsible for the following:

- Log into CalJOBS with your provider access
- Select **Manage Providers** from the **Services for Workforce Staff** section of the navigational menu
- Select **Create a Provider**
- Enter all the required (*) fields in the Provider Information section

- For the following fields use these selections:
  - Status: Active
  - LWIA Region: San Diego Workforce Partnership
  - Type of Entity: Other
  - This provider is an accredited postsecondary education institution: No
- Ensure that the billing address entered is the remittance address for the employer.
- Select Save

The next page will be the **Provider Type Details** page.

- Select the checkbox for PS – Transitional Job
- Select Save

After the page saves successfully, CalJOBS will automatically navigate to the **Provider Profile**, **General** tab.

- Next, select the **Locations** tab
- If the participant will be working at a location other than the one listed, use the **Add Location** button
  - Enter all the required (*) fields for an additional Main Address, Billing Address and Mailing Address
  - Select Save
- Next, select the **Contacts** tab
- Add a contact by selecting the **Add Contact** button
- Enter the following fields:
  - First Name
  - Last Name
  - Title
  - Telephone Number
  - Email Address
- In the **Contact Locations** section, select a **Contact Type** from the available drop-down menu.
- Check the box for **Selected** next to the address at which the participant will be training
- Select Save

3. CREATE THE PROVIDER PROGRAM (OCCUPATION INFORMATION)

A Provider Program can be created for each contracted TJ within the Provider Profile.

The Business Service Representative is responsible for the following:

- Log into CalJOBS with your provider access
- From within the Provider Profile, select the **Program Services** link beneath the **Provider Programs** folder
- Select the **Add Program Services** button
- Select PS – Transitional Job (TJ) for Service Type
- Enter the following fields:
  - Status: Active
  - Program/Service Names: Fill in the TJ job title
  - Program/Service Description: TJ skills and responsibilities
  - This program of study or training services has the following potential outcome(s):
  - Employment
  - This is a Pay for Performance Contract: No
  - Job Title: Fill in the TJ job title
  - Wage per Hour: Fill in the hourly wage
    - Required Format: XX.XX (include two decimal places)

- Hours per Week: Fill in the planned hours per week
  - Required Format: XX.X (include one decimal place)
- Track Enrollment Costs: Yes
- Worksite Required: No

- Skip the **Acceptance Information** section
- Select Save
- Scroll down to **Program/Service Customer Group**
  - Select Edit **Customer Group Details** link
  - Check the box for:
    - Adult, Dislocated Worker, and National Dislocated Worker Grant (NDWG)
- Select the Save button at the bottom of the page
  - Scroll down to the Program/Service Occupation
- Select **Occupation Details link**
- Select Add **Occupation link**
  - Search for the appropriate SOC Code
  - Select the Save button
- Scroll down to the **Program/Service Cost Details**
  - Select **Edit Cost Details** link
  - Select **Add Cost Items** link
  - Select **Total TJ Wage Costs** link
    - Enter **Wage** with contracted hourly wage
      - Required Format: XX.XX (include two decimal places)
  - Select **Hourly** for **Wage** Type from drop-down menu
    - Enter **Duration**
      - Total number of contracted hours
    - Enter **Wage Reimburse Rate**
      - Percentage of reimbursement
  - Select Save button
- Scroll down to the **Program/Service Locations**
  - Select **Edit Location Details**
    - Check the box for **Selected** for the location at which the participant will be training
    - Select Save
- **Program setup is now complete**
  - Logout of CalJOBS

F. TJ AGREEMENT AND REQUEST FOR TRAINING FUNDS

The Business Service Representative shall be responsible for the following training request documentation and data entry processes. Approved training requests will require the appropriate training activity code be entered into CalJOBS, generation of the CalJOBS Activity Enrollment Form (Training Agreement), obtaining all the necessary signatures on the Training Agreement, uploading documentation to CalJOBS, and submission of participant information no less than five (3) business days prior to the start date of training.

Request Training Funds

1. CalJOBS Activity Code Data Entry

The Business Services Representative is responsible for the following:

- Log into CalJOBS with your personal case management staff account
- Navigate to an individual participant profile
- Add appropriate training activity code in CalJOBS
  - 321– Transitional Jobs

- Enter the required (*) fields on each of the following tabs:
  - General Information
  - Service Provider
  - Enrollment Cost
- On the **General Information** tab:
  - Projected Begin Date (participant cannot start prior to the projected begin date but may start after the projected begin date)
  - Projected End Date (the Training Agreement should always reflect the accurate end date. However, after the Training Agreement has been submitted to the employer, change the Projected End Date in CalJOBS one month past the actual end date in effort to allow time to close out the activity before the system closes)
  - **DO NOT** enter the Actual Begin Date
  - In the *Comments* field text box include:
    - Training Agreement Number:
      - Type just the agreement number (See Training Agreement Number above for format)
    - Priority Sector:
      - On the next line type "Priority Sector:"
      - Type the priority sector name, refer to (Priority Sectors - San Diego Workforce Partnership)

EXAMPLE:

MA-1234-001 **Priority Sector: Healthcare**

- On the **Service Provider** tab:
  - Use the Select Provider link to search the employer's name and make a selection
  - Use the Select Services, Course or Contract link to select the appropriate training program name
- Use the Select Occupational Code link to select the appropriate SOC code
- Select the Next button at the bottom of the page to save selections
- On the **Enrollment Cost** tab:
  - Verify data is correct in the following fields:
    - Total TJ Wage Costs
    - Wage
    - Wage Type
    - Duration
    - Wage Reimburse Rate
      - Applicable box is checked

If all fields are correct, no data entry is required on this tab. If any errors exist in any of the fields mentioned above, please correct them on this tab.

  - Select the Next button at the bottom of the page
  - Navigate to the **Closure Information** tab.
  - Select Finish button
  - Click Print Form

2. CALJOBS ACTIVITY ENROLLMENT FORM

The Business Service Representative is responsible for the following:

- Generate the Activity Enrollment Form (TJ Agreement) PDF
- Review the Training Agreement for errors
  - Verify the following information:
    - Customer information
    - Funding/Grant
    - Activity code
    - Projected start and projected end dates

        - Agreement number
        - Comments Box is formatted correctly and complete
        - Provider and program selections
        - Training costs
- Obtain signatures
    - Activity Enrollment Form PDF
        - Applicant Signature Line
            - Signed by the participant
        - Staff Signature Line
            - Signed by the Business Services staff/manager
- Enter attached case note to training activity code.
    - Case note to include:
        - Subject Line: Activity Code – Activity Code Description + "Agreement Uploaded"
          Example: "321 – Transitional Jobs – Agreement Uploaded"
    - Case note text: "A TJ Agreement has been completed and signed by all parties. All documentation has been uploaded to CalJOBS."
    - Upload TJ Agreement to case note
    - Add TJ Agreement to the participants folder in SharePoint
    - Notify Training Funds Coordinator via shared document link

NOTE: No changes can be made to a signed TJ Agreement. If there is an error found on the signed Training Agreement, a new Training Agreement must be created, and new signatures obtained after corrections have been made.

3. TRAINING AGREEMENT APPROVAL

The Training Funds Coordinator will review the CalJOBS data entry and signed TJ Agreement of those participants with a 321-activity code and assigned budget in CalJOBS.

The Training Funds Coordinator is responsible for the following:

- Navigate to the 321-training activity code in the participants program profile
- Use the (W) wizard icon to enter the activity code in edit mode
- Enter the **Enrollment Budget** tab
    - Select the correct budget
        - Example: TJ DW FY24
    - Add the TJ training amount to the Fund Amount field
- Navigate to the **Closure Information** tab
- Enter attached case note to training activity code
- Case note to include:
    - **Subject Line**: Activity Code – Activity Code Description + "Request for Training" Example: "321 – TJ Request for Training"
    - **Case note text**: "TJ Training Agreement reviewed and approved by the Training Funds Coordinator."
- Forward approved TJ Training Agreement to the Finance department via email.

In the event the CalJOBS data entry and/or Training Agreement has missing or incorrect information, the Training Funds Coordinator will notify the Business Service Representative via the Training Document Correction log. The Training Agreement will not be approved until the necessary modifications requested are completed. Any change to signed Training Agreement will require a new form to be generated and new signatures obtained from all signees. Any changes to the CalJOBS data entry of training provider and/or program, office location, or customer group will require the submission of a Data Change Request (DCR).

The BSR will run CalJOBS reports to identify approved training. The Business Services Representative shall notify the training provider of the approval via e-mail and attach the Training Agreement.

a) Activity Enrollment Summary (TJ Agreement)

The Business Service representative shall confirm that the participant started training and shall document the confirmation by entering into the CalJOBS training code the Actual Begin Date. An attached case note will also be added to the activity indicating the participant has begun training.

b) Case Notes

In the 321 Transitional Job Activity Code navigate to the Closure Tab. The following sample case note shall be used:

> On [**Date**] I called [**Name of Training Provider**] to verify I [**Name of Participant**] started working on [**Date**]. I spoke with [**Name of Contact**] and [**Contact's Title**]. [**Name of Contact**] verified that [**Name of Participant**] attended work on the [***intended start date**].

c) Projected Start Date

If the participant's actual start date is different than the "projected start date" noted on the signed Agreement do not make any changes to the projected start date in CalJOBS, instead an additional case note should be entered to document the change of start date, and the reason for the change. Notify the Training Funds Coordinator of the new projected start date.

G. TJ VOUCHER

A voucher in CalJOBS will function as a request for payment to the training provider. The Training Funds Coordinator must enter a voucher for training in CalJOBS at monthly or midpoint and completion of training.

1. Voucher Processing

Vouchers are submitted through CalJOBS in the Budget Planning tab of your training activity code and are to be completed by the Business Service Representative, Training Funds Coordinator, and Finance Analysis.

Voucher Process

The Business Services Representative is responsible for collecting necessary documents from the TJ business partner and uploading them to participants folder in SharePoint and will notify the Training Funds Coordinator via shared document link.

These documents include:

- Hours of verification (applicable only when nearing the fiscal year end and projecting hours is necessary)
- Payroll Records (Identify Payment Schedule when notifying the Training Funds Coordinator)
    - Example: "Mid-Point Payroll for Jane Doe"

a) Generating the Voucher

The Training Funds Coordinator is responsible for the following:

- Generate TJ Voucher

- Navigate to the 321 – Transitional Job activity code in the participants program profile
- Use the (W) wizard icon to enter the activity code in edit mode
- On the Budget Planning tab:
  - Select the Add a Voucher link
  - Approval Status field
    - Pending approval
  - Reference No field
    - Enter the Training Agreement Number
  - Date field
    - Enter the current date as the voucher request date
  - Beginning Date field
    - Enter the start date of the payroll period as entered on the Clarification of Hours Form
  - Ending Date field
    - Enter the end date of the payroll period as entered on the Clarification of Hours Form

  Cost Details Section
  - Duration field
    - Enter the total number of hours worked.
      - CalJOBS will auto calculate the total amount based on the hourly wage that was provided.
  - Comment Box
    - Enter the payment schedule type following this format:
      "Payment Schedule: Schedule Type"
      Schedule Type Options:
      - For monthly payments: "Monthly (invoice #)"
      - For mid-point payments: "Midpoint"
      - For end of the fiscal year payments: "End of the Fiscal Year"
      - For final payments: "Completion"

      Examples:
      Payment Schedule: Monthly 1
      Payment Schedule: Midpoint
      Payment Schedule: End of Fiscal Year
      Payment Schedule: Completion
      Only enter one payment schedule type
  - Select the Save button when complete
  - Select the Print link to generate the Program Service Voucher PDF
- Upload the Voucher into the participant folder in SharePoint and notify the BSR
- Once notified by BSR, check participant folder for signed Voucher
- Verify signatures on signed voucher
- Merge required documentation to create the TJ Voucher packet
- Required documentation
  - Signed TJ Voucher
  - Clarification of Hours Form
  - Payroll Records
  - Discontinuance Memos are to be uploaded in Caljobs as a separate document *(when applicable)*
  - Review the TJ Voucher packet for accuracy and completeness
  - Enter the 321 activities to upload and approve the TJ Voucher
  - Navigate to the **Budget Planning** Tab
  - Expand the Voucher Link

- Click Edit Link
  - Manage Voucher Field
    - Update Approval Status to Approved
    - Select the Save button when complete

Once approved, the voucher status will be updated to "Approved."

- Navigate to the **Closure Information** Tab
- Enter attached case note to training activity code
  - Case note to include:
    Subject Line: Activity Code – Activity Code Description + "Voucher - payment schedule" Example: "321 – TJ Training Voucher - Midpoint"
  - Case note text: "Voucher entered and approved by the Training Funds Coordinator"
  - Attached the TJ Voucher packet to the Case note

The Workforce Partnership Finance Department will run the CalJOBS Payment Report weekly for approved vouchers. Payment will be mailed directly to the training provider within 30 days of the report date. Once the Workforce Partnership Finance Department has prepared the payment, the check number, check amount, and check print date will be entered into CalJOBS.

b) Payment Processing

The Finance Specialist is responsible for the following:

i. Printing Training Vouchers
   - In the Menu section
     - Select Manage Funds
   - Click the IFT Fund Management link
     - Select Manage Obligations
   - Enter Participant's First Name & Last Name in the fields
     - Select Search
     - Select View
     - Select Print and Save the Voucher

ii. Adding payment information to the participants profile in CalJOBS.
     - Select Add a Payment
   - Manage Payments Section
     - Select Processed
   - Paid Date Field
     - Enter the payment date
   - Check No. Field
     - Enter the check number
   - Details Section
     - Other Costs Box
     - Enter the amount that was paid
   - Final Payment Section
     - Select the Number of Further payments will be made against the obligation
     - Select Save
     - Send weekly payment reports to the Training Services and Business Experience teams

2. Employer Responsiveness

The BSR must collect payroll documents from the employer's and submit to the TFC within 14 days from the invoice deadline. If the employer is unresponsive for 30 days past the invoice due date the BSR must send a letter as a final attempt to collect the supporting documents in order to invoice for the participants wages. If the employer continues to be unresponsive for 60 days the TJ Agreement must be discontinued, and no payments will be reimbursed.

3. Closing Activity Code

Once the Completion Voucher has been approved for payment, the Business Service representative is responsible for inputting the close-out activity and entering appropriate case note.

- Navigate to the **Closure Information** Tab
- Enter attached case note to training activity code
    - Case note to include:
      Subject Line: Activity Code – Activity Code Description + "Completion"
      Example: "321 – TJ Voucher Completion"
      Case note text: "Participant successfully completed training"

H. DATA CORRECTIONS, VOIDS, AND DISCONTINUATIONS

Participants, at their right, may discontinue training at any point during the program. It is the responsibility of the Career Navigator, BSR and Training Provider to work with each participant and ensure their training needs are met. However, a participant may not switch to a different program and/or provider under the same Training Agreement and may not be eligible for another TJ if they discontinue. Discontinuations will be evaluated on a case-by case basis by the Manager of Career Center Services (training).

1. Data Corrections

The Training Funds Coordinator is responsible for submitting Data Change Requests.
A TJ correction occurs when the data in CalJOBS needs to be corrected and/or data needs to be inputted after a system closure in CalJOBS and staff cannot make the correction with their current account privileges.

2. Training Void

A TJ Void occurs when a participant decides to forego training: a participant does not start training and no costs are incurred.

Void Process

Voids can only be submitted if no actual start date was entered, and no voucher was submitted through CalJOBS.

1. A Training Void requires a Data Change Request (DCR) be submitted to The Operations team via the DCR system for the completion status of the training code to be set to void. Reference ***the Workforce Partnership Operations Manual, Chapter 5: CalJOBS Data Entry Policies and Procedures*** for required fields and procedures.
2. Employer Driven Training DCR's must be approved and submitted by the Manger of Business Experience to the Trainings Funds Coordinator via email at OJT-Documents@workforceorg. Email must contain the following:
    - Participant's First and Last Name:
    - State ID#
    - Request Description:
    - Reason for correction (be specific):
    - Steps taken to avoid recurrence (be specific):
    - Data correction or Void:
    - Provide correct dates if it is a data correction:
3. Once submitted the TFC must enter an attached case note to the training activity code. Case note must include the following:
    - Subject Line: Activity Code – Activity Code Description + "VOID"

Example: "321 – Transitional Job Service VOID"
- After your DCR has been submitted enter an attached case note to the training activity code explaining the reason for void and include that the DCR has been submitted.

3. Training Discontinuation

A TJ Discontinuation occurs when a participant starts training and discontinues training. If the participant's discontinuance is due to an unforeseeable emergency (i.e., documented illness) then the participant is eligible for reinstatement, based on approval.

Discontinuation Process

1. The Business Services Representative shall enter the correct last date of training and completion status.
   - If a start date was entered and no voucher submitted, update the completion status to drop out of activity.
   - If a start date was entered and a voucher was submitted, update the completion status to unsuccessful completion.
2. The Business Services Representative shall enter an attached case note to training activity code; case note must include the following:
   - Subject Line: Activity Code – Activity Code Description + "Discontinuance"
     Example: "321 – Transitional Job Service Discontinuance"
   - Case note text explaining the reason for discontinuance and the last day the participant attended training.
3. The Business Service Representative shall provide the discontinuance explanation to The Training Funds Coordinator.
4. The Training Funds Coordinator will create and submit the discontinuance/dis-encumbrance memo and will dis-encumber funding that was not completely spent outcome end of training. This applies for successful (Disencumber) or unsuccessful (Discontinuance) completions.
   - Enter the Enrollment Budget tab
     - Manually update the Funded amount to match the final reimbursement amount
   - Enter the Enrollment Cost tab
     - Manually update the Duration field to the actual hours worked
       - In the Wage Reimbursement Rate field, check off the Applicable box
       - Select next to save
5. The Training Funds Coordinator shall enter an attached case note to training activity code; case note must include the following:
   - Subject Line: Activity Code – Activity Code Description + "Discontinuance or Disencumbrance Memo" Example: ""321 – Transitional Job Service Discontinuance Memo"
   - Case note text: Memo to disencumber remaining funding has been uploaded by the Training Funds Coordinator and provided to finance.
   - Attached the Discontinuance/Disencumbrance memo to the case note.

   Note: A DCR to remove a training activity code cannot be submitted for a discontinuance once payment has been received by the training provider unless a full refund has been received and processed by the Workforce Partnership Finance Department. Any partial payment to the training provider also disqualifies the training activity code from being removed in CalJOBS.

I. PROGRESS REPORT & ATTENDANCE

The training provider must provide **ATTACHMENT – PARTICIPANT EVALUATION &**

PROGRESS REPORT FORM on the participant's progress and attendance to the Business Service Representative at midpoint of training or before the program year ends (June 30th) whichever comes first. In the event that the participant fails to attend training, quits, or is terminated the employer must inform the Career Center staff within three (3) days.

J. REFERENCES

WIOA Regulations at 20 CFR, parts 680.200, 700, 710, 720, 730
TEGL 2-15, "Operational Guidance for National Dislocated Worker Grants, pursuant to the Workforce Innovation and Opportunity Act (WIOA or Opportunity Act)."
TEGL 19-16, "Guidance on Services provided through the Adult and Dislocated Worker Programs under the Workforce Innovation and Opportunity Act (WIOA) and the Wagner-Peyser Act Employment Service (ES), as amended by title III of WIOA, and for Implementation of the WIOA Final Rules."