

1611TSK Digital Documentation Uploading

Effective Date: July 2020

Last Modified: August 2021

Local Workforce Development Board (LWDB) must maintain documentation to ensure credibility of eligibility determinations and support Data Element Validation requirements in alignment with this policy and *WorkSource System Policy 1003 (Rev6) Data Element Validation and 1600POL Records and Documentation*.

All physical documentation is required to be uploaded in the applicable Efforts to Outcomes (ETO) TouchPoint (TP) location. If specific documentation was not required or obtained case notes are required to explain why documentation is missing or unnecessary.

TRIGGER: Case worker receives documentation from participant, training/school, support service, or internal accounting department.

TARGET: All participant documentation uploaded correctly into MIS (currently ETO).

Subrecipients for WIOA Adult and Dislocated Worker opted for online application delivery system, provided by Kitsap County's Cognito Forms. Deletion of all entries will be performed by OWDC staff on a quarterly basis.

OWDC Internal Deletion Procedure/Task:

1. Log into Cognito Forms → OWF
 - a. Two separate forms, one for ESD and one for KCR. Both require the same actions
 - b. Hover mouse over one of the applications (ESD or KCR)
 - i. Click Entries
 - c. List of entries will populate, click on check box at top to select all.
 - d. Click Actions
 - i. Export → All Fields
 - ii. Excel file will download
 1. Email file to supervisor
 - e. Back in Cognito → Click Actions
 - i. Delete
 - ii. Delete Entry window → Select Delete
 - f. Complete steps c – f for the second form (ESD or KCR)
 - g. Log out of Cognito

Immediately upon receiving all WIOA eligibility documentation.

1. Separate documentation by type.
2. Scan documentation to computer.
3. (At computer) Rename documentation using naming convention.
4. Upload documents into corresponding TP in ETO.
5. Shred physical documents (*or* follow subrecipient policy for file documentation requirements).
6. Delete documentation on computer.

Uploading documentation into ETO TP's.

TouchPoint

WIOA Eligibility Application

Documents:

All application fields need to be completed; the following are document upload fields:

Demographics Tab:

- Date of Birth Verification

- Driver's License or Birth Certificate
- Legally Entitled to Work Attachment I9 documentation
- Selective Service Information Tab
 - Selective Service Printout
- Veteran Information Tab
 - Veteran Verification Attachment DD-214
- Employment Tab
 - Employment Attachment
 - Dislocated Worker Verification
- Income Information Tab
 - TANF Verification Attachment
 - Other Public Assistance
 - SSI/SSCI Attachment
- Barriers Tab
 - Basic Literacy Deficiency Verification

Program Enrollment Complete the Program Enrollment
If co-enrolling, two separate TPs for each program are required.

Individual Participant Plan Fill in completely
YOUTH – Goals Tab
Upload Paper Version of Plan
ISS
Objective Assessment

Individual Training and Support Service ***Development of Individual Employment Plans (2.0)***

- Upload Files
- Signed and dated:
Equal Opportunity Notice of the Right to File Discrimination Compliant
Notice of Right to file WIOA Complaint and Grievance
Data Sharing Notice
 - WIOA Enrollment Application
 - Labor Market Information
In-Demand or Not In-Demand
 - Financial Worksheet
- *Program Enrollment Case Notes*

Basic Service ***Basic Assessment (2.0)***

TRAINING SERVICES

- Apprenticeship Training***
- Customized Training***
- Entrepreneurial Training***
- Incumbent Worker***
- Occupational Skills***
- On-The-Job***
- Training Paid by Other***
- Workplace Training (WEX)***

- Upload Files
- Eligible Training Provider (Career Bridge Printout)
 - Employer Contract
 - Course Schedule
 - Commissioners Approved Training
 - Individual Training Account
 - Valid and Applicable correspondence
 - Invoice / Receipt
 - Purchase Order/ A19
 - Time Sheets

- Any documentation of other resources explored FASFA/Worker Retraining/etc.

SUPPORT SERVICES

Program Support Services (Other)

Program Support Services (Transportation)

Upload Files

- Invoice/Receipt
- A19 or Purchase Order
- All supporting documentation of services provided.

CAREER SERVICES

Upload Files

- Any career services documentation

MEASURABLE SKILLS GAINS

Tests and Measures

Upload Files

- CASAS Testing Results
- Progress Reports
- Transcriptions
- Report Cards
- Diplomas
- Certifications

OUTCOMES

Upload Files

- All application outcome documentations

Uploaded Documents

All other documentation not listed above.

NAMING CONVENTION: Participant last name, first name initial, document name, date (ex. SmithJ WIOA App 2020SEPT20).

REFERENCES

Data Element Validation, [WorkSource System Policy 1003 \(Rev6\)](#)

OWDC Records and Documentation [1600POL](#)