

# CITY OF LOS ANGELES

CALIFORNIA

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1200 W. 7TH STREET  
LOS ANGELES, CA 90017

**DATE:** October 24, 2018

**TO:** LA's Workforce Development System

**FROM:** Gerardo Ruvalcaba, Director   
Workforce Development System

**SUBJECT: WDS DIRECTIVE NO. 19-07**  
*(Supersedes WDS Directive No. 18-14)*  
**"LOS ANGELES RECONNECTIONS CAREER ACADEMY 2.0"**  
**CALJOBS AND INVOICING GUIDELINES**

## EFFECTIVE DATE

This directive is effective upon date of issue.

## PURPOSE

The purpose of this directive is to set forth the CalJobs Management Information System (MIS) and new invoicing guidelines for the City of Los Angeles "Los Angeles Reconnections Career Academy (LARCA) 2.0" contracts. Compensation of expenditures in the following service modules: (1) Outreach, Enrollment, Evaluation and Assessment; (2) Case Management Sessions is retroactive to July 1, 2018 (Reference Expenditure Table).

## BACKGROUND

LARCA 2.0 will provide members of the plaintiff class in the case of "Rodriguez vs. the City of Los Angeles" with a Jobs and Education Program including work readiness and employment services in preparation for entering the workforce, apprenticeship programs, and vocational training opportunities leading to available employment in high demand industries. Participants may receive career counseling, case management, support services, employment readiness, vocational training and education, subsidized employment and employment services through the program administered by the EWDD. All eligible participants must be pre-approved through the court-designated claims administrator. The initial contract term for LARCA 2.0 will be retroactive from June 1, 2017 to June 30, 2019.

The City will contribute a minimum of \$1.125 million and up to a maximum of \$7.5 million per year, over a four-year period. The LARCA 2.0 service providers include procured City of Los Angeles Workforce Innovation and Opportunity Act (WIOA) Workforce Development System providers and the Los Angeles Regional Initiative for Social Enterprise (LA:RISE) service providers. The average estimated expenditure per participant is approximately \$10,000. Participants may receive up to \$1,000 in the form of stipends pursuant to

This WIOA Title I financially assisted program or activity is an equal opportunity employer/program.  
Auxiliary aids and services are available upon request to individuals with disabilities.

completion of their educational and training milestones and up to \$1,000 in support service funds to address barriers to employment or retention of current employment.

The program will be reviewed annually by a third-party evaluator, California State University Northridge, to ensure it is providing appropriate services to program participants.

## MIS GUIDELINES

As the source of monies are City General Purpose funds, participants are **NOT** to be co-enrolled into the City's WIOA programs nor other special grant-funded programs without the express written pre-authorization of the City. However, if the participant is already receiving services through a City-funded grant, such as the LA:RISE or WIOA Programs, that participant is still eligible to receive additional services through this program.

The participant should not receive duplicate services; nor should the service provider seek reimbursement for services already provided through other programs. Co-enrollment will require pre-approval from the City.

For purposes of tracking participant activities and outcomes, service providers (LARCA 2.0 providers) shall use **Grant Code 554** for the LARCA 2.0 program in CalJobs.

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Local Funded Grant	564	LARCA 2.0	LAI554		<a href="#">Add</a>

As delineated in the instructions below, LARCA 2.0 provider case managers must input the following five specific activities that are required in order to enroll LARCA 2.0 participants.

- 101 – Orientation
- 102 – Initial Assessment
- 226 – Reading and/or Math Testing
- 205 – Development of Individual Education and Employment Plan (IEEP)
- 311 – Placed in Job Corps (*supersedes activity code 202 Career Guidance/Planning*)

**Please note:** The IEEP must be completed within 30 days of the start of the enrollment process, and “Placed in Job Corps” activities must be provided to prevent the record from “soft exiting” during the life of the program. The end date of May 31, 2021 must be used for Activity Code 311 – Placed in Job Corps.

Please use the following instructions onto properly report the Local Grant Code and related LARCA 2.0 program activities into the CalJobs system. Please see the attached “LARCA 2.0 CalJobs Reporting Screenshots” to be used as a reference for these instructions.

### 1. Search for / Assisting an individual.

- a. If the individual is already enrolled in the system, please contact the LARCA 2.0 Unit staff for further instructions.
- b. If the individual does not match your search criteria, complete the registration form by following these steps:
  - Return to “Services for Workforce Staff”
  - Select “Manage Individuals”

- Select "Create an Individual"
- Complete the Registration Form

## **2. Create the WIOA application**

Once the Registration Form is complete, staff should "Create the WIOA application" by following these steps:

- Return to the "Services for Workforce Staff"
- Select "Manage Individual"
- Select "Assist an Individual"
- Go to WIOA Program tab
- Click on "Create WIOA Application"
- Complete the required fields of the application

## **3. Add the Local Grant Code**

To add the Local Grant Code to the drop down menu, follow these steps in the "Eligibility and Grants:"

- Go to "Non-WIOA Grants"
- Select "Local Funded Grants" then select "Yes"
- Scroll to the Grants Section and select "View Available Grants"
- All the Local Grants will be available. Click "Add LAI554 LARCA 2.0"
- Scroll down and click "Finish"

## **4. Create an Activity**

From this point on, you will be able to select Local Grant when creating an activity.

- Go to "Create Activity," and under General Information click on "Customer Program Group"
- Select "98 Local Funded"
- Scroll down to "Enrollment Information"
- Click on the "Grant" drop down menu to select LAI554 LARCA 2.0
- Click on the "Select Activity Code" link
- **Note:** Selecting this link allows the user to access a pop-up window to select an activity code for this enrollment.
- Select the assigned activity code
- Enter an Actual Begin Date and Projected End Date
- **Note:** While each Activity Code should accurately reflect a Projected End Date, four of the required initial Activity Codes must have a Closed Date that matches the Begin Date.
- Continue to complete the rest of the fields
- Scroll down and select "Next" at the bottom of the page

**Reminder:** Please verify that in addition to selecting the local grant code, the required five Activity Codes are entered as well:

- 101 – Orientation
- 102 – Initial Assessment
- 226 – Reading and/or Math Testing
- 205 – Development of IEEP/ISS/EDD
- 311– Placed in Job Corps (*must use end date of May 31, 2021*)

## 5. Activity Closure Information

Under "Last Activity Date" enter the same date as the begin date of the activity you selected. Under Completion Code, select "Successful Completion" then select "Finish."

## MIS REQUESTS

For any needed MIS requests (such as data correction, assigning a pseudo social security number, or provider transfers), providers must use the attached "**LARCA 2.0 CalJobs Request for Correction & Transfer Form**" and email it to [LARCA2.0MIS@lacity.org](mailto:LARCA2.0MIS@lacity.org) with the subject heading "LARCA 2.0 MIS Request, [provider name] and [contract number]."

Co-enrollments: If the participant is already in the CalJobs system, providers are required to contact the EWDD MIS Unit via [LARCA2.0MIS@lacity.org](mailto:LARCA2.0MIS@lacity.org) to secure pre-approval and prior to co-enrolling the participant.

Provider Transfers: If the participant goes to another LARCA 2.0 provider to request services, the new provider, upon verifying participant enrollment with the provider of record, should proceed to submit the "**LARCA 2.0 CalJobs Request for Correction & Transfer Form**," select "provider transfer" and email the EWDD MIS Unit at [LARCA2.0MIS@lacity.org](mailto:LARCA2.0MIS@lacity.org), as well as notify the previous service provider. The new transfer provider will need to review the participant's file and continue servicing the client based on the participant's outlined IEEP and progress to date.

## REQUIRED SERVICE ACTIVITY CODES

The following service activity codes must be reported in CalJobs.org:

MIS REQUIRED SERVICE ACTIVITY CODES			
SERVICE MODULE	SERVICE ACTIVITY	CALJOBS CODE	DOCUMENTS/FORMS TO UPLOAD TO CALJOBS
<b>Outreach, Enrollment, Evaluation, &amp; Assessment</b>	CalJobs Enrollment: <i>Orientation</i>	101	<ul style="list-style-type: none"> <li>➤ Copy of approval letter</li> <li>➤ Basic Needs &amp; Skills Assessment Worksheet</li> <li>➤ Skills Assessment Tool (e.g. CASAS):</li> <li>➤ IEEP Form</li> </ul>
	<i>Initial Assessment</i>	102	
	Skills Assessment: <i>Reading and/or Math Testing</i>	226	
	<i>Development of IEEP</i>	205	
	<i>Placed in Jobs Corps</i> ( <i>Note: Code 311 supersedes code 202</i> )	311*	<i>Note: To keep record from soft exiting, use end date of: 05-31-2021</i>
<b>Case Management (CM) Sessions</b>	CM Sessions & Supports: <i>Individual Counseling</i> <i>Note: Enter service activity code up to 36 times (per contract period) to reflect face-to-face CM sessions / active communication exchanges)</i>	200	<ul style="list-style-type: none"> <li>➤ Case Management Sessions Update Form</li> </ul>

## MIS REQUIRED SERVICE ACTIVITY CODES

SERVICE MODULE	SERVICE ACTIVITY	CALJOBS CODE	DOCUMENTS/FORMS TO UPLOAD TO CALJOBS
<b>Career Services and Employment Readiness Workshops</b>	Pre-employment skills training or workshop(s) to support a participant's IEEP: <i>Short-Term Pre-vocational Services</i>	215	➤ Workshop flyer, sign-in sheet or certificate of completion. <i>Note: Enter activity code up to seven (7) times to reflect completed workshops.</i>
	<i>Financial literacy education (MANDATORY)</i>	221	➤ Same as other workshops
<b>Career Services and Employment Readiness Workshops</b>	Job Readiness Assessment: <i>Interest and Aptitude Testing</i>	204	➤ Copy of participant's resume <i>Note: list name; you may redact other personal information)</i> ➤ Completed Job Readiness Assessment Tool
<b>Vocational Training &amp; Education</b>	<i>Education and Training to support the participant's IEEP:</i> 300 Occupational Skills Training (ETPL Provider) 301 On-the-Job Training 302 Entrepreneurial Training 304 Customized Training 305 Skills Upgrading and Retraining 313 Placed in State/ Local Training (non-TAA, non-WIOA) 320 Private Sector Training 324 Adult Education with Training Services 325 Apprenticeship Training 328 Occupational Skills Training (non ETPL provider) 330 Local Board Determination Training	Any of the following: 300,301 302,304, 305,313, 320,324, 325,328, 330	➤ Education and Training agreements ➤ Attendance record or Sign-in sheets ➤ Certificate of completion <b>Tuition:</b> ➤ Proof of academic good standing (ie: transcripts, progress reports) ➤ Financial aid award letter
<b>Training and Education Stipends</b>	Stipends: <i>Supportive Services: Incentive/Bonuses</i> (Enter service activity code up to 2 times to reflect the two \$500 stipend milestones)	183	➤ Stipend Verification Form with participant signature
<b>Transitional Employment Wages</b>	Transitional Employment: <i>Work Experience</i>	219	➤ Transitional Employment agreement ➤ Paystubs with name of participant and employment dates (redact other personal information)
<b>Job Placement and Follow-up Services</b>	<i>Follow-up Services After Employment</i> (Enter service activity code up to 12 times to reflect face-to-face follow-up meetings)	106	➤ Follow-up Services Update Form
<b>Support Services</b>	<i>Supportive Services:</i> 180 Supportive Service: Child/Dependent Care 181 Supportive Service: Transportation Assistance 182 Supportive Service: Medical 184 Supportive Service: Temporary Shelter 185 Supportive Service: Other 186 Supportive Service: Seminar /Workshop Allowance 187 Supportive Service: Job Search Allowance	Any of the following: 180,181, 182,184, 185,186, 187,188, 189,190,	➤ Supportive Services Verification Form with participant signature

**MIS REQUIRED SERVICE ACTIVITY CODES**

SERVICE MODULE	SERVICE ACTIVITY	CALJOBS CODE	DOCUMENTS/FORMS TO UPLOAD TO CALJOBS
	188 Supportive Service: Tools/Clothing 189 Supportive Service: Housing Assistance 190 Supportive Service: Utilities 191 Supportive Service: Educational Testing	191	

MIS Required Service Activity Codes: Providers shall enter only the service activity codes outlined in this directive; however, providers should capture all services being provided to customers in the participant's case notes.

Documents to Upload to CalJobs: Providers shall request a copy of the participant's Approval Letter, and use the following LARCA 2.0 standardized forms: Basic Needs and Skills Assessment Worksheet, Individual Education and Employment Plan; Case Management Sessions Update; Job Readiness Assessment; Support Services Verification; Education Stipend Verification; Transitional Employment Notification; and Follow-up Session Update.

**INVOICING GUIDELINES**

For the LARCA 2.0 program, contracted providers shall be paid for service expenditures up to the maximum amount specified in the Expenditure Table below.

***All service activities must be reported in CalJobs to receive payment.***

<b>EXPENDITURE TABLE</b>		
SERVICE MODULE	UP TO MAXIMUM AMOUNT	REQUIRED ELEMENTS AND DOCUMENTATION
<b>Outreach, Enrollment, Evaluation &amp; Assessment</b>  <b>1. Outreach</b>  <b>2. Enrollment, Evaluation &amp; Assessment</b>	\$1,000 Outreach activities  \$300 per participant/enrollment  (One-time expense per participant)	<b>1. Outreach: (retroactive to July 1, 2018)</b> <i>Outreach and recruitment activities (\$25/hour; maximum of 4 hours per outreach activity or event;</i> <ul style="list-style-type: none"> <li>• Contractor must submit the "LARCA 2.0 Outreach Activity Report" (using template provided) and provide copies of outreach event flyer and sign-in sheets.</li> </ul> <b>2. Enrollment, Evaluation, &amp; Assessment (All of the following are required to receive payment):</b> <ul style="list-style-type: none"> <li>• CalJobs Program Enrollment/Registration</li> <li>• Completed Basic Needs and Skills Assessment Worksheet</li> <li>• Completed Skills Assessment Tool (CASAS equivalent)</li> <li>• Detailed Individual Education and Employment Plan (IEEP) that clearly identifies the participant's barriers to employment, the plan of action to address those barriers, and the participant's education and employment goals</li> </ul>
<b>Case Management (CM) Sessions</b>  <b>1. CM Sessions</b>	CM Sessions/ Supports \$3,600	<b>1. CM Sessions:</b> <i>Up to 36 CM sessions per contract period to address barriers to employment and/or education as identified in the IEEP.</i> <ul style="list-style-type: none"> <li>• At a minimum, one (1) "active communication" exchange per month (e.g. in person meeting, video conferencing, telephone calls).</li> <li>• Payment will be based on the number of delivered CM sessions as documented and detailed in the "<b>Case Management Sessions &amp; Support Activities Update</b>" at a</li> </ul>

EXPENDITURE TABLE		
SERVICE MODULE	UP TO MAXIMUM AMOUNT	REQUIRED ELEMENTS AND DOCUMENTATION
<p>2. CM Supports</p> <p>3. Performance Reporting</p> <p>4. Collaboration Sessions and Training</p>	<p>Performance Reporting &amp; Collaboration Sessions/ Training Attendance</p> <p>\$1,000</p>	<p>rate of \$100/CM session.</p> <p><b>2. CM Supports: (retroactive to July 1, 2018)</b></p> <ul style="list-style-type: none"> <li>Payment will be based on the number of CM support activities as documented and detailed in the “<b>Case Management Sessions &amp; Support Activities Update</b>” Form at a rate of \$25/CM support (maximum of 4 CM Supports/month, for a total of \$100)</li> </ul> <p><b>3. Performance Reporting: (retroactive to July 1, 2018)</b></p> <p>Performance reporting, summaries, and success stories and other supplemental reports as requested by EWDD including (a) CalJobs “Monthly Online Characteristics Report” and scanned uploads (grouped by participant); (b) fiscal reporting “Data Entry Spreadsheet Tab” detailing services rendered; and (c) success story. Compensation is at a rate of \$25/monthly supplemental report (maximum \$75/month).</p> <p><b>4. Meeting Attendance (retroactive to July 1, 2018)</b></p> <p>Attendance by LARCA 2.0 primary public contact at collaboration meetings, training, and best practice sessions as scheduled by the City as evidenced by sign-in sheets at a rate of \$50/session.</p>
<p><b>Career Services and Employment Readiness Workshops</b></p>	<p>\$500</p>	<p><i>Payment will be based on the number of workshops completed (at \$60 per workshop; however, actual costs are required to be reported for any “contracted” workshops)</i></p> <ul style="list-style-type: none"> <li>Up to seven (7) pre-employment skills training or workshops (ex. job search skills, resume-writing, interviewing skills, computer basics, money management, personal accountability, stress solutions, research and preparation, soft skills training, customer service, and work etiquette)</li> <li>Financial literacy certificate of completion (MANDATORY course)</li> <li>Workshop flyer and sign-in sheet or certificate of completion</li> <li>CalJobs summary case notes outlining skills training workshops completed by participant</li> <li>Participant’s Resume</li> <li>Completed Job Readiness Assessment Tool compensated at \$80/assessment, provided participant has completed a minimum of one (1) job readiness workshop.</li> </ul>
<p><b>Vocational Training &amp; Education</b></p>	<p>\$5,000</p>	<ul style="list-style-type: none"> <li>Training agreement (payment for actual cost of training; for total hours completed by participant)</li> <li>Attendance record or certificate of completion</li> <li>Jobs LA summary case notes confirming the successful completion of IEEP training and education goals</li> </ul>
<p><b>Training and Education Stipends</b></p>	<p>\$1,000</p>	<ul style="list-style-type: none"> <li>Stipend Verification Form with participant signature</li> <li>Jobs LA case notes confirming successful completion of IEEP education and training milestones (one-time only, up to \$1,000)</li> </ul>
<p><b>Transitional Employment Wages (*payroll related)</b></p>	<p>\$6,500*</p>	<ul style="list-style-type: none"> <li>Transitional Employment Agreement, Up to 400 hours at the City’s minimum hourly wage (payment for wage reimbursement based on actual number of hours worked)</li> <li>Copy of the Participant’s Paystubs</li> </ul>

EXPENDITURE TABLE		
SERVICE MODULE	UP TO MAXIMUM AMOUNT	REQUIRED ELEMENTS AND DOCUMENTATION
taxes, fees, and insurance costs may also be billed)		<ul style="list-style-type: none"> <li>Completed Job Readiness Assessment Tool (at midpoint and at conclusion)</li> <li>CalJobs case notes confirming successful completion of transitional employment</li> </ul>
Job Placement and Follow-Up Services	\$900	<ul style="list-style-type: none"> <li>Proof of employment (e.g. Employment Verification Letter or copy of participant pay stub)</li> <li>CalJobs summary case notes clearly documenting Contractor's role in securing job placement for the participant (e.g. job referral, facilitated interview with an employer, brokered placement after completion of transitional employment, targeted recruitment)</li> <li>CalJobs summary case notes documenting the follow-up meetings and services provided and the Follow-Up Services Update Form. <i>Payments will be for individuals placed in competitive employment and will be based per follow-up meeting (at \$75 per meeting).</i></li> <li>Up to twelve (12) monthly face-to-face/active communication exchange follow-up meetings to assist with employment retention (e.g. in person meeting, video calling, telephone calls).</li> </ul>
Support Services	\$1,000	<ul style="list-style-type: none"> <li>Supportive Services Verification Form with participant signature (one-time only, up to \$1,000)</li> </ul>

#### REQUEST FOR APPROVAL FORM (FOR EXCESS AMOUNT):

On average, \$10,000 may be allocated per participant based on services provided. The costs for services are inclusive of all programmatic and administrative costs. Any cost in excess of that amount or in excess of the identified maximum amount per service module (*Case Management Sessions, Career Services and Employment Readiness Workshops, Vocational Training and Education, Transitional Employment, Follow-up Services, or Support Services*) must be pre-approved by the City using the attached LARCA 2.0 Request for Approval Form. The request form must be e-mailed to the LARCA 2.0 Unit at [LARCA2.0Approvals@lacity.org](mailto:LARCA2.0Approvals@lacity.org) with subject heading "LARCA 2.0 Request for Approval, [provider name], [contract #]." LARCA 2.0 Program Staff will review and approve the submitted requests.

#### INVOICE TEMPLATE

Contracted providers shall submit the attached financial reporting forms electronically to LARCA 2.0 program operations staff for review and approval before payment processing. *Please attach a cover letter on official letterhead signed by an authorized provider representative.*

The financial reporting forms (invoice/cash request, detailed expenditure report, and data entry spreadsheet) shall be submitted on a monthly basis **by the 15<sup>th</sup> of the month**. The forms must be e-mailed to the LARCA 2.0 Unit at [LARCA2.0Approvals@lacity.org](mailto:LARCA2.0Approvals@lacity.org) with subject heading "LARCA 2.0 Monthly Invoice, [provider name], [contract #]."



To receive payment:

1. LARCA 2.0 Service Module minimum required service elements must be met.
2. All required service activities must be reported in [CalJobs.org](http://CalJobs.org). Attach a copy of the “**CalJobs Monthly Online Characteristics Report**” (in Excel) to the financial reporting forms (Please reference attached LARCA 2.0 CalJobs Reporting Instructions for step-by-step instructions and the sample service activity report).
3. All support documents outlined in the LARCA 2.0 CalJobs/MIS Required Service Activity Codes table must be:
  - Scanned and grouped by participant,
  - Attached to the monthly invoice, and
  - Uploaded to the CalJobs system.
4. All expenditure support documentation must be kept in the participant’s file.
5. All costs billed to the City must be accounted for and recorded separately in the provider’s general ledger.

#### **ZERO EXPENDITURES FISCAL REPORT:**

Providers must submit an invoice on a monthly basis even if no services were rendered nor costs incurred during a particular month. The provider should indicate zero expenditure on the fiscal reporting forms and invoice. This will allow the City to ensure the accuracy of obligations or expenditures and to have positive confirmation that no subsequent charges will follow.

#### **WDS CONTACT**

Questions and/or concerns should be addressed to the LARCA 2.0 Unit, Attention: Monica Walters at 213-744-9709 or Elizabeth Macias at 213-744-7196, TTY (213) 744-9395.

#### Program requests:

Address all questions and/or concerns regarding the CalJobs MIS to: [LARCA2.0MIS@lacity.org](mailto:LARCA2.0MIS@lacity.org).

Address all questions and/or concerns regarding program and fiscal approvals to: [LARCA2.0Approvals@lacity.org](mailto:LARCA2.0Approvals@lacity.org).

GR:JPO:MW:EM:cg

Attachments:

1. LARCA 2.0 MIS CalJobs Request for Correction Form & Transfer Form
2. LARCA 2.0 MIS CalJobs/MIS Reporting Instructions (Step-by-Step Screenshots; Recommended Activities; LARCA 2.0 On-line Characteristics Report instructions; Sample Report)
3. LARCA 2.0 All Standardized Program Forms Revised OCT 2018
4. LARCA 2.0 Request for Approval Form Revised OCT 2018
5. LARCA 2.0 Financial Reporting Forms and Instructions Revised OCT 2018
6. LARCA 2.0 Outreach Activity Report