

CITY OF LOS ANGELES

CALIFORNIA

JAN PERRY
GENERAL MANAGER




ERIC GARCETTI
MAYOR

ECONOMIC AND WORKFORCE
DEVELOPMENT DEPARTMENT

1200 W. 7TH STREET
LOS ANGELES, CA 90017

DATE: January 24, 2018

TO: LA's Workforce Development System

FROM: Gerardo Ruvalcaba, Director 
Workforce Development System

SUBJECT: WDS DIRECTIVE NO. 18-14
(Supersedes WDS Directive No. 18-06, dated September 15, 2017)
"LOS ANGELES RECONNECTIONS CAREER ACADEMY 2.0"
MIS AND INVOICING GUIDELINES

EFFECTIVE DATE

This directive is effective upon date of issue.

PURPOSE

The purpose of this directive is to set forth the MIS and invoicing guidelines for the City of Los Angeles "Los Angeles Reconnections Career Academy (LARCA) 2.0" contracts.

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 will 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. 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.

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 WorkSource Centers (WSC) and 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 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. All eligible participants will 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 May 31, 2018.

MIS GUIDELINES

As the source of monies are local funds, participants are **NOT** to be co-enrolled into the City's WIOA Adult and Dislocated Worker programs nor other special grant-funded programs without the express written 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 individual should not receive duplicate services; nor should the service provider seek reimbursement for services already provided through other programs. Co-enrollment will require approval from the City.

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

As discussed in MIS training sessions and as delineated in the instructions below, LARCA 2.0 agency 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)
- 202 – Career Guidance/Planning

Please note: *The IEEP must be completed within 30 days of the enrollment date, and "Career Guidance/Planning" 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 202 – Career Guidance/Planning.*

The MIS Unit has provided the following instructions on how to properly report the Local Grant Code and related LARCA 2.0 program activities into the JobsLA system. Please see the attached "LARCA 2.0 JobsLA 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 (namely, 101 – Orientation; 102 – Initial Assessment; 226 - Reading and/or Math Testing; and 205 - Development of an IEEP/ISS/EDD) 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
- 202 – Career Guidance/Planning (*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 required MIS requests (such as data correction, assigning a pseudo social security number, or agency transfers), agencies must use the attached **LARCA 2.0 JobsLA Request for Correction Form**. The form must be e-mailed to the LARCA2.0MIS@lacity.org with subject heading "LARCA 2.0 MIS Request, provider name and contract number."

Co-enrollments: If the participant is already in the JobsLA system, agencies are required to contact the EWDD MIS Unit via LARCA2.0MIS@lacity.org to secure approval and prior to co-enrolling the participant.

Agency Transfers: If the participant goes to another LARCA 2.0 provider to request services, the new provider, upon verifying participant enrollment with another provider, should proceed to submit the LARCA 2.0 JobsLA Request for Correction Form "selecting agency transfer" to the EWDD MIS Unit and notify the previous service provider. The new transfer site will need to review the participant's file and continue servicing the client based on their outlined Individual Education and Employment Plan (IEEP) and progress to date.

REQUIRED SERVICE ACTIVITY CODES

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

MIS REQUIRED SERVICE ACTIVITY CODES			
SERVICE MODULE	SERVICE ACTIVITY	JOBSLA CODE	DOCUMENTS/FORMS TO UPLOAD TO JOBS LA
Enrollment, Evaluation, & Assessment	JobsLA Enrollment / Orientation	101	<ul style="list-style-type: none"> ➤ Copy of approval letter ➤ Basic Needs & Skills Assessment Worksheet ➤ Skills Assessment Tool (e.g. CASAS): ➤ IEEP Form
	Initial Assessment	102	
	Skills Assessment Reading and/or Math Testing	226	
	Development of IEEP	205	
	Career Guidance/Planning	202*	Note: To keep record from soft exiting, use end date: 05-31-2021
Case Management Sessions	Case Management Sessions: Individual Counseling (Enter service activity code up to 12 times to reflect face-to-face CM sessions)	200	<ul style="list-style-type: none"> ➤ Case Management Sessions Update Form
Career Services and Employment Readiness Workshops	Pre-employment skills training or workshop to support the participant's IEEP: <i>Short-Term Prevocational Services</i>	215	<ul style="list-style-type: none"> ➤ Workshop flyer, sign-in sheet or certificate of completion Note: Enter activity code up to 7 times to reflect completed workshops.
	Financial literacy education	221	<ul style="list-style-type: none"> ➤ Same as other workshops

MIS REQUIRED SERVICE ACTIVITY CODES			
SERVICE MODULE	SERVICE ACTIVITY	JOBSLA CODE	DOCUMENTS/FORMS TO UPLOAD TO JOBS LA
Career Services and Employment Readiness Workshops (continued)	Job Readiness Assessment: <i>Interest and Aptitude Testing</i>	204	<ul style="list-style-type: none"> ➤ Copy of participant's resume (Note: list name; you may redact other personal information) ➤ Completed Job Readiness Assessment Tool
Vocational Training & Education	<i>Education and Training</i> to support the participant's IEEP:	Any of the following: 300,301 302,304, 305,313, 320,324, 325,328, 330	<ul style="list-style-type: none"> ➤ Education and Training agreements ➤ Attendance record or Sign-in sheets ➤ Certificate of completion Tuition: <ul style="list-style-type: none"> ➤ Proof of academic good standing (ie: transcripts, progress reports) ➤ Financial aid award letter
Training and Education Stipends	Stipend: <i>Supportive Services: Incentive/Bonuses</i> (Enter service activity code up to 2 times to reflect the two \$500 stipend milestones)	183	<ul style="list-style-type: none"> ➤ Stipend Verification Form with participant signature
Transitional Employment Wages	Transitional Employment: <i>Work Experience</i>	219	<ul style="list-style-type: none"> ➤ Transitional Employment agreement ➤ Paystubs with name of participant and employment dates (redact other <i>personal information</i>)
Job Placement and Follow-up Services	<i>Follow-up Services After Employment</i> (Enter service activity code up to 12 times to reflect face-to-face follow-up meetings)	106	<ul style="list-style-type: none"> ➤ Follow-up Services Update Form
Support Services	<i>Supportive Services</i>	Any of the following: 180,181, 182,184, 185,186, 187,188, 189,190, 191	<ul style="list-style-type: none"> ➤ Supportive Services Verification Form with participant signature

MIS Required Service Activity Codes: Agencies are to enter only the service activity codes outlined in this directive. However, agencies should capture all services being provided to customers in the participant's case notes.

Documents to Upload to JobsLA: Agencies 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 agencies shall be paid for service expenditures up to the maximum amount specified in the Expenditure Table below.

EXPENDITURE TABLE		
SERVICE MODULE	UP TO MAXIMUM AMOUNT	REQUIRED ELEMENTS AND DOCUMENTATION
Evaluation & Assessment	\$300	<p><i>All of the following are required to receive payment:</i></p> <ul style="list-style-type: none"> • JobsLA Program Enrollment/Registration • Completed Basic Needs and Skills Assessment Worksheet • Completed Skills Assessment Tool (CASAS equivalent) • 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 (One-time expense per participant)
Case Management Sessions	\$1,200	<ul style="list-style-type: none"> • Up to 12 monthly face-to-face case management sessions to address barriers to employment as identified in the IEEP. <i>Note: Payment will be based on the number of delivered case management sessions (at \$100 per session).</i> • JobsLA case notes documenting the case management session and services provided and Case Management Sessions Update Form.
Career Services and Employment Readiness Workshops	\$500	<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"> • 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) • Financial literacy certificate of completion (MANDATORY course) • Workshop flyer and sign-in sheet or certificate of completion • JobsLA summary case notes outlining skills training workshops completed by participant • Participant's Resume • Completed Job Readiness Assessment Tool (at \$80)
Vocational Training & Education	\$5,000	<ul style="list-style-type: none"> • Training agreement (payment for actual cost of training; for total hours completed by participant) • Attendance record or certificate of completion • Jobs LA summary case notes confirming the successful completion of IEEP training and education goals

EXPENDITURE TABLE		
SERVICE MODULE	UP TO MAXIMUM AMOUNT	REQUIRED ELEMENTS AND DOCUMENTATION
Training and Education Stipends	\$1,000	<ul style="list-style-type: none"> • Stipend Verification Form with participant signature • Jobs LA case notes confirming successful completion of IEEP education and training milestones (one-time only, up to \$1,000)
Transitional Employment Wages (*payroll related taxes, fees, and insurance costs may also be billed)	\$5,000*	<ul style="list-style-type: none"> • 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) • Copy of the Participant's Paystubs • Completed Job Readiness Assessment Tool (at midpoint and at conclusion) • JobsLA case notes confirming successful completion of transitional employment
Job Placement and Follow-Up Services	\$900	<ul style="list-style-type: none"> • Proof of employment (e.g. Employment Verification Letter or copy of participant pay stub) • JobsLA 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) • JobsLA 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> • Up to twelve (12) monthly face-to-face follow-up meetings to assist with employment retention.
Support Services	\$1,000	<ul style="list-style-type: none"> • Supportive Services Verification Form with participant signature (one-time only, up to \$1,000)

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, or Follow-up 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 with subject heading "LARCA 2.0 Request for Approval, name of your agency, contract #." LARCA 2.0 Program Staff will review and approve the submitted requests.

INVOICE TEMPLATE

Contracted agencies shall use the attached financial reporting forms to request payment for delivered services. Please include cover letter in official letterhead signed by an authorized agency representative.

The financial reporting forms (invoice/cash request and detailed expenditure report) shall be submitted on a monthly basis on the 15th of the month. The forms must be e-mailed to

the LARCA 2.0 Unit at LARCA2.0Approvals@lacity.org with subject heading "LARCA 2.0 Monthly Invoice, name of your agency, contract #."

All financial reporting forms will be submitted to LARCA 2.0 program operations staff for review and approval before payment processing.

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 JobsLA.org.
Attach a copy of the JobsLA Service Activity Report to the financial reporting forms. Please reference attached MIS Instructions On-line Characteristics Report for step-by-step instructions and the sample service activity report.
3. All support documents outlined in the MIS Required Service Activity Codes Table must be scanned, attached to the monthly invoice and uploaded to the JobsLA 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 agency's general ledger.

Agencies must submit an invoice on a monthly basis even if no services were rendered nor costs incurred during a particular month. The agency 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, 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 JobsLA Management Information System to: LARCA2.0MIS@lacity.org.

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

GR:JPO:MW:EM:cg

Attachments:

1. LARCA 2.0 MIS JobsLA Request for Correction Form
- 2A. JobsLA Reporting LARCA 2.0
- 2B. LARCA 2.0 MIS JobsLA Recommended Activities
- 2C. LARCA 2.0 Online Characteristics Report - Revised Jan 2018
- 2D. LARCA 2.0 MIS JobsLA Sample Characteristics Service Activity Report
3. LARCA 2.0 Standardized Program Forms - Revised Jan 2018
4. LARCA 2.0 Request for Approval Form
5. LARCA 2.0 Financial Reporting Forms and Instructions - Revised Jan 2018