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### Directions:

*Offices should use this template as a starting point to create their own standard operating procedure (SOP) document. A standard operating procedure document should include clear-cut directions and instructions to the necessary steps to complete a specific task or process. SOPs include important background and overview information as well as policy related to the procedures. Items in this document that are universal to the digital intake form have been completed for you. Items that need to be added based on your specific office have been highlighted with directions included in green font in this document. Please add your office specific information to the editable SOP document. Because this is meant to be a comprehensive tool for your office, please feel free to add content where your office sees fit.*

# Purpose of the Standard Operating Procedure Manual

**Purpose:** This manual outlines the standardized processes and procedures for the digital intake form and serves as a comprehensive reference for staff to navigate intake form operations in their office.

**Audience:** This document is a guide for all PA CareerLink® staff including Operators, Site Administrators, BWPO Supervisors, Partner Program Supervisors, BWPO staff and Partner Staff.

**Definition of Process:** For the purpose of this Standard Operating Procedure Manual, process is identified as the series of actions or steps taken by PA CareerLink® office staff to conduct PA CareerLink® intake for new and returning job seekers. This does not cover the processes for intake into specific programs.

**Definition of Policy:** For the purpose of this Standard Operating Procedure Manual, policy is identified as the set of guidelines to be used by PA CareerLink® office staff when entering information for a job seeker into CWDS. This document also includes links to existing office specific policies.

**Definition of Procedure:** For the purpose of this Standard Operating Procedure Manual, procedure is identified as specific course of action taken by office staff when collecting information from job seekers coming into a PA CareerLink® office by using outlined process and programmatic guidance.

## Digital Intake Form Background

The PA Department of Labor & Industry (DLI) and PA State Workforce Development Board seek to better understand the demographics and barriers of individuals (job seekers) that enter their PA CareerLink® offices or engage with their offices looking for career related support – regardless of the individual’s enrollment in eligibility-based programs and services received. Creating a common intake form was also a priority outlined in PA’s WIOA Combined State Plan, which was approved by the State Workforce Development Board, and approved by DLI’s federal funders and the Governor’s office. The digital intake form project supports the Customer Service Transformation Plan to standardize and centralize user data and create a one-stop customer service experience.

This section includes a summary of the purpose of the digital intake form.

### Purpose

- Creates a standardized intake process to provide all job seekers with a consistent, valuable experience regardless of the PA CareerLink® office
- Increases PII protection and data security for job seekers by eliminating a paper trail of job seeker information
- Improves the job seeker experience in each office by minimizing job seekers repeatedly answering the same questions
- Provides insight into the demographics of job seekers that engage with the PA CareerLink® whether or not individuals enroll in eligibility-based programs and receives services
- Helps staff collect information they need upfront from job seekers to better understand how they can provide support and future services

- Improves how DLI and the and the LWDAs support individuals in remediation of barriers and to continuously improve service delivery strategies

## Digital Intake Form Functionality Overview

This section includes a summary of the functionality and structure of the digital intake form.

### Job Seeker Functionality

- Collects demographic and barrier information from job seekers for staff to use in identifying services and supports for the job seeker
- Includes questions specific to job seekers who are veterans or their eligible spouses and caregivers and helps identify priority of service for these individuals
- Saves information for returning job seekers' future visits
- Provides staff easy access to all information collected on the intake form through a set of staff-facing screens
- Includes the ability to translate the form, request staff assistance and more information function

### Staff Facing Functionality

- Improved foot traffic reports to better understand in-office customer activities
- Two new crystal reports provide both a summary and detailed view of the information collected from job seekers on the digital intake form as well as total job seeker counts to help with foot tracking
- Time saving process to collect customers' intake information
- Easy access to customer's information across the PA CareerLink® system to leverage workforce services and support
- Insight into each customer's barriers/workforce needs to use in the existing referral and IEP process
- Reduces the number of paper intake forms and data entry
- Access to customer survey data to improve office operations
- Added Staff Screens
  - Left Hand Menu updates
  - Intake Summary Screen
  - Digital Intake Search Screen
  - Case Management Dashboard Widget

### Structure

- Web-based tool through CWDS that can be accessed on any laptop, computer, and/or tablet regardless of whether or not you are on a commonwealth network
- PA CareerLink® registration process at the beginning of the form for job seekers without a PA CareerLink® account or provides opportunity for job seekers to sign into already existing account
- Separated into two sections of questions for job seekers to fill out; section 1 demographics; section 2 barriers to employment

- Customer service questions at the end of the form to collect feedback on the intake form experience for job seekers.

## Digital Intake Form Usage Guidance

This section includes guidance on the usage of the digital intake form provided by workforce leadership. To confirm this is the most updated version of the workforce guidance, please follow this link [Workforce Policies and Forms \(pa.gov\)](#)

### Will my PA CareerLink® office be required to implement the digital intake form?

The PA CareerLink® Digital Intake Form accessed through the Commonwealth Workforce Development System (CWDS) is the official method for collecting customers' demographic and barrier information upon intake in all PA CareerLink® offices across the Commonwealth. The PA CareerLink® Digital Intake Form will provide a standardized, targeted way to gather pertinent customer information for PA CareerLink® staff to utilize so the customer can have a consistent and productive experience when they visit any PA CareerLink® office.

This digital questionnaire will replace paper intake processes/triage forms and must be used for conducting an intake on new and returning customers at any PA CareerLink® site. Data collected from this form is regarded as WIOA Title III – Wagner Peyser data and as such, it is subject to [Pennsylvania's Workforce System of Record Policy \(No. 01-2015\)](#). This data is housed and is accessible in CWDS to PA CareerLink® partners with corresponding roles that have access to view participant summary screens. In addition to data integration into participant summaries, the PA CareerLink® Digital Intake Form will inform a staff dashboard screen and generate reports that include but are not limited to a Summary Report that aggregates key demographics and barriers and a Detailed Report that provides individual response details.

Furthermore, any PA CareerLink® office that currently requires customers to complete an intake form – regardless of whether the site is considered a mobile, comprehensive, affiliate site or other – must transition to the use of the PA CareerLink® Digital Intake Form, in accordance with their phase assignment in the project implementation timeline outlined in Attachment A. Failure to complete this transition according to the schedule would be a violation of the Workforce System of Record Policy. The Pennsylvania Department of Labor & Industry reserves the right to monitor and evaluate adequate implementation of the PA CareerLink® Digital Intake Form and strongly encourages self-monitoring. It is important to note the potential that PA CareerLink® staff from all partners/roles may be required to fulfill responsibilities related to the implementation and delivery of the PA CareerLink® Digital Intake form.

### Should Unemployment Compensation (UC) customers complete the CWDS Digital Intake Form?

Visitors to a PA CareerLink® office seeking Unemployment Compensation services are PA CareerLink® customers, and therefore, must complete the PA CareerLink® Digital Intake Form.

### When is it appropriate to use the paper version of the digital intake form?

The expectation is that the digital intake form will be the official standard and default method of collecting demographic and barrier information of customers visiting PA CareerLink® sites as first-time or returning customers with few exceptions.

Discretion should be used in deciding when extenuating circumstances exist that necessitate the substitution of the paper form. It is recommended that you refer to your site's Standard Operating Procedures and/or Operational Checklist for other considerations. Every effort should be made for customers to complete the digital intake form on their own and when requested, with technical assistance.

In some cases, it may be necessary to complete the digital intake form in an interview format as a one-on-one accommodation to support a customer's individual needs. The use of the paper form is to be reserved for when all other efforts have been exhausted. Extenuating circumstances may include:

- During an internet or power outage, or any other similar situation where significant barriers to accessing the online intake form exists.
- While conducting off-site service activities for which you may want to capture data, but logistical constraints exist that prevent the utilization of needed technology.
- Large on-site events where the volume of participants would create an undue hardship or a significantly negative impact on operations; for example, lack of devices to support each customer attending the event.

The scenarios above are examples of when discretion should be used to use the paper version of the digital intake form, and it is, by no means, an exemption from the required method of collecting this data.

### What are the tracking and timeliness requirements if a paper form must be used to gather customer information?

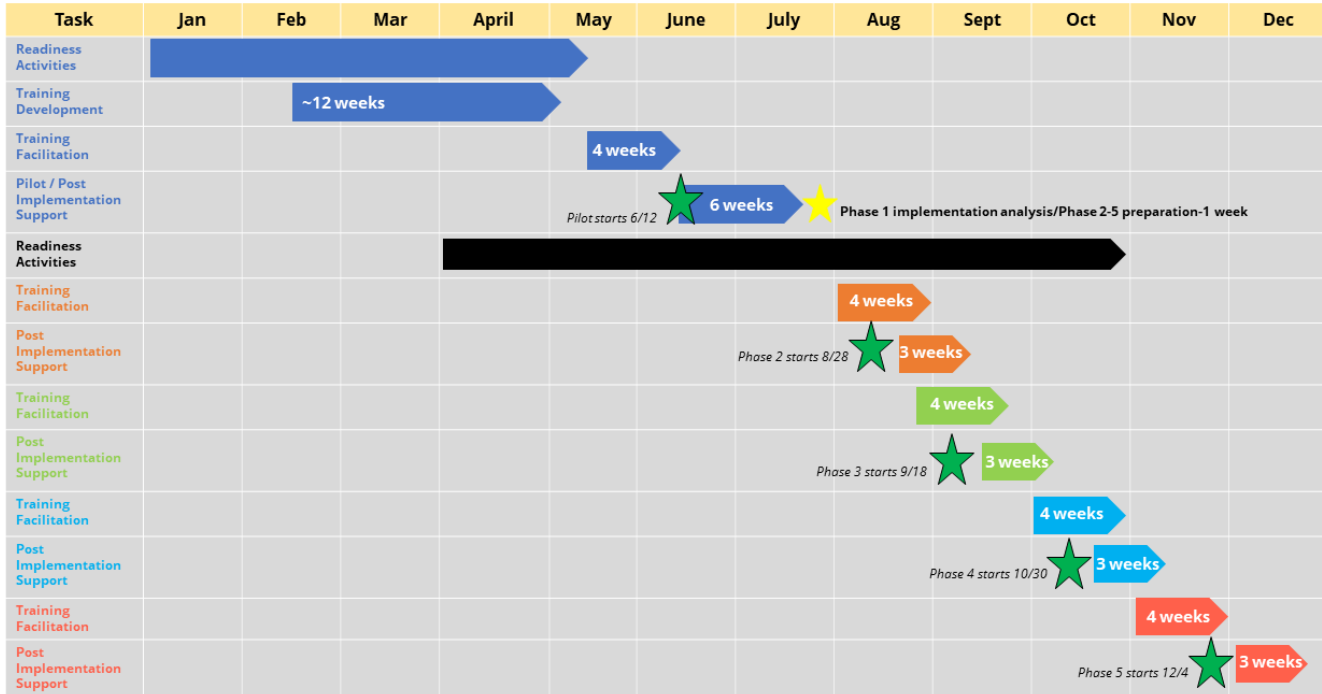
CWDS/PA CareerLink® is the system of record for tracking WIOA Title III – Wagner Peyser participant data. It is critical that the PA CareerLink® Digital Intake Form, whether the digital or paper version, be completed prior to services being rendered.

As per System of Record Policy directive, all workforce development data and activities must be entered into CWDS/PA CareerLink® to ensure compliance with federal and state statutes, regulations, and policies within 30 days of actual date of occurrence. For best practices, we strongly recommend that data collected on the paper version of the PA CareerLink® Digital Intake Form be entered into CWDS within 10 business days of paper form completion.

Upon data entry of the paper form information into CWDS, paper forms must be shredded immediately. This practice ensures maximum safekeeping of customers' personal identifiable information, or PII.

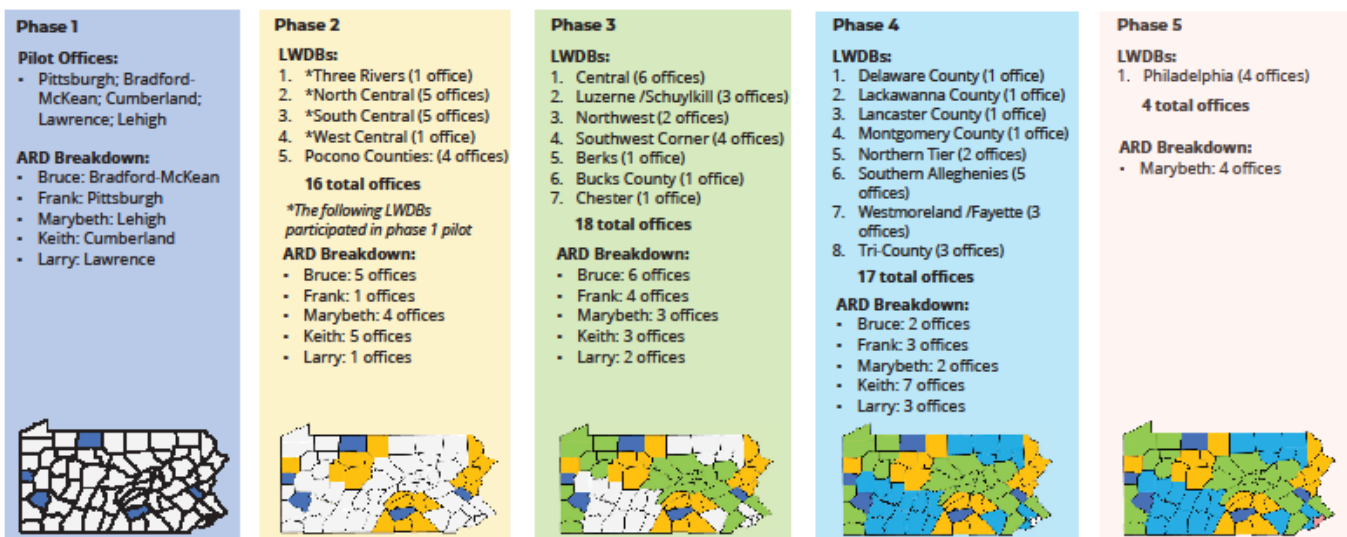
## Digital Intake Phases Statewide Roll-Out Timeline

Phase 1 Activities Phase 2 Activities Phase 3 Activities Phase 4 Activities Phase 5 Activities



## Digital Intake Phased Roll-Out Approach

The following approach outlines the strategy for moving forward with implementing the CWDS digital intake form to all PA CareerLink® offices across five phases.





# Policy

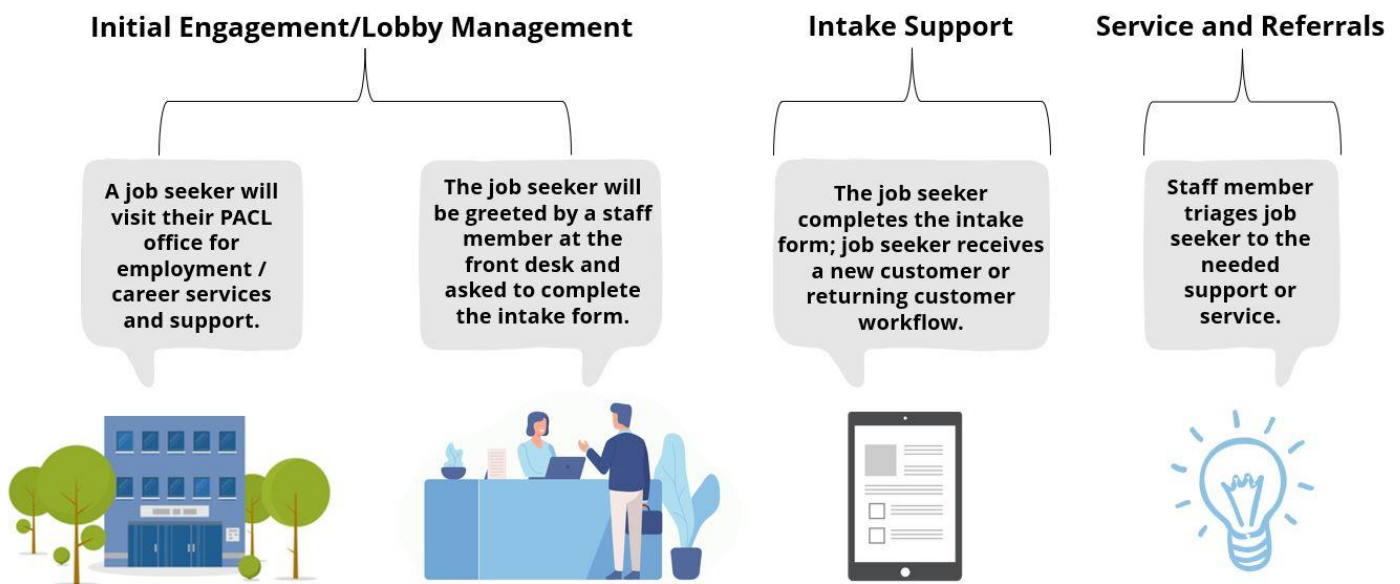
Below is a list of federal, state, and local statutes, regulations, and policies that support and are referenced in the Standard Operating Procedure

*Staff should be mindful of the Facility Operating Procedures when working with customers to complete the DIF.*

Pennsylvania's Workforce System of Record Policy.

## Process and Procedure

This section includes a detailed narrative of the processes and procedures to implement the digital intake form. The following shows a preview of how a job seeker engages with the digital intake form including initial engagement and lobby management, job seeker intake support, and services and referrals.



*Directions: Offices can complete this section by adding step-by-step instructions to gain a documented, consistent manner of procedures for their office staff. Think of this as a playbook for how staff should complete a task. This list is not exhaustive, and offices are encouraged to add any topics related to routine operations surrounding the implementation of the digital intake form. Offices should personalize this portion of the document with operations that already occur in their office and the operations they thought through and included on the Operations Checklist document. One of the tasks has been completed as an example. Please edit as necessary.*



## Initial Engagement/ Lobby Management

This section focuses on the tasks during the initial engagement and lobby management of the job seeker.

- Device Assignment
- Questions to ask job seeker
- Onsite accessibility and accommodations
- Accommodations when filling out the form
- Request assistance

### Initial Engagement/ Lobby Management Task 1: Device Assignment *Example*

1.	Customers will have access to the following devices when filling out the DIF for the first time: <ul style="list-style-type: none"><li>• Any of the 14 CRC computers</li><li>• 2 stand-alone computers (purchased specifically for the DIF)</li><li>• 8 iPads – 4 of which are in Kiosks or 4 of which are in portable cases (otterbox)</li></ul>
2.	<p>**If filling out the DIF for the first time (and/or if the customer does not know or remember their KID/PW – they will be directed to the CRC complete the DIF b/c of the extended time frame it will take to complete).</p> <p>**Returning customers will be directed to a Kiosk or portable device b/c the process is shorter. Returning customers can complete the DIF in the lobby or the CRC.</p>

### Initial Engagement/ Lobby Management Task 2: Questions to ask job seeker

*What questions will your office need to ask job seekers before they fill out the digital intake form?*

	<ul style="list-style-type: none"><li>• Is this your first visit to our office?</li><li>• Do you have a PA CareerLink account?</li><li>• Do you have a KID and/or password? (If communicating with customer by phone prior to being on-site, staff will remind job seeker to be sure to bring their KID/password with them)</li><li>• Do you need assistance completing the form (e.g. special accommodation)?</li><li>• Do you remember your KID and password?</li></ul>
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### Initial Engagement/ Lobby Management Task 3: Onsite accessibility accommodations

*What types of onsite accessibility accommodations will need to be in place to support job seekers?*

1.	PACL Chester County is fully ADA accessible and has an ADA accessible computer customers can utilize to complete the DIF. The ADA provides accommodations for the hearing and sight impaired as it includes a large print keyboard, trackball mouse, privacy screen, JAWS and Zoom Text Software and an adjustable desk.
2.	Additionally, an Ubi Duo device has been purchased recently and will be helpful in communicating to individuals who are hearing impaired.

Initial Engagement/ Lobby Management Task 4: Accommodations when filling out the form

*If a job seeker identifies they need accommodations when filling out the form, the intake form instructs them to visit the front desk. How will your office be prepared to provide support to these job seekers?*

1.	PACL Chester County has staff and SCSEP participants assigned to the general/CRC area to assist customers. If assistance is needed, staff will assist as appropriate.
2.	Title I and BWPO Career Advisors will provide necessary support to customers on a needed basis as well.
3.	
4.	

Initial Engagement/ Lobby Management Task 5: Request assistance

*If a job seeker requests staff assistance in helping complete the form, where in your office can you provide a private space for the job seeker and staff member?*

1.	PACL has private meeting rooms where customers can complete the intake forms if needed. There are two rooms adjacent to the reception desk and 3 small meeting rooms adjacent to the CRC.
2.	
3.	
4.	

Initial Engagement/ Lobby Management Task 6: Device Scenarios-all devices in use

*If all available devices are in use, how will additional job seekers fill out the digital intake form?*

1.	If all devices are in use, customers will be directed to the CRC to use one of those computers to complete the intake.
2.	If all 8 iPad devices and all 14 CRC computers are in use, Job Seekers will be asked to complete a paper intake form
3.	
4.	

Initial Engagement/ Lobby Management Task 7: Device Scenarios-large groups

*How will your office navigate scenarios when large groups of job seekers enter your office and need to engage with the digital intake form?*

1.	When large groups of individuals enter the office, we will make use of all of the devices and have paper DIF available for customers who have already completed the initial DIF intake.
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2.	CRC and Assigned Staff will then be required to enter DIF info into Job Seeker's PACL profile
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Initial Engagement/ Lobby Management Task 8: Loss of Power/Wi-Fi

*If your office loses power/Wi-Fi is down, how will job seekers complete the digital intake form?*

1.	PA CareerLink will make use of the paper DIF available to assist customers if the wi-fi goes down.
2.	During power outages, county policy (due to safety requirements) requires the facility to close and re-open when power is restored.
3.	
4.	

Initial Engagement/ Lobby Management Task 9: *Add topic here; add as many task charts as necessary.*

1.	<i>Add as many rows to the chart as necessary to create step by step directions for each task.</i>
2.	
3.	
4.	

## **Job Seeker Intake Support**

This section includes tasks that would occur during the time the job seeker is completing the digital intake form.

- Retrieval of account information
- Paper version considerations
- Device considerations
- Digital Intake form guidance consideration
- *Add additional tasks here*

Job Seeker Intake Support Task 1: Retrieval of account information

*Since registration / PA CareerLink® account sign-in is the first step of the digital intake form, how will your office manage providing job seekers KID recovery and/or password reset support before starting the intake form? Note: Password recovery is the preferred method for staff to take to avoid duplicate accounts for a job seeker.*

1.	Customers who do not remember or who need support in retrieving the KID and/or password will be directed to the CRC for staff assistance.
2.	Staff assigned to the CRC will provide the necessary assistance in retrieving their KID/password if needed. Once complete the customer may compete the DIF at the CRC computer.
3.	Staff will instruct job seekers to retain their KID and password information by using either a KID/PW card provide by PACL staff and/or by taking a photo of it for future use/return visits to the office.
4.	

#### Job Seeker Intake Support Task 2: Guidance consideration

*After reviewing the formal guidance provided by workforce leadership on the use of the digital intake form, how will your office incorporate this guidance into your daily office operations?*

1.	Any/all guidance received thru the CCN, Labor and Industry and local leadership will be shared with staff on a regular basis thru email updates, at regular staff meetings and thru established training sessions for staff on how to use the DIF.
2.	Staff have been directed to web-based training videos found in the CWDS help center
3.	Local Leadership will provide a series of staff trainings which includes a local demo of the DIF and the process for a number of different scenarios
4.	Leadership and front line staff will visit PACL Lehigh to see the DIF in action
5.	

#### Job Seeker Intake Support Task 3: Paper version considerations

*If a job seeker filled out the paper version of the intake form, who in your office will input the information into CWDS?*

1.	PACL Chester Count will utilize SCSEP participants assigned to the CRC to assist as well as an intern thru the Title I programs.
2.	Staff will also be available to input information into CWDS on an as needed basis.
3.	
4.	

#### Job Seeker Intake Support Task 4: Device considerations

*How will your team keep track of devices / make sure devices do not leave the office?*

1.	The iPad Kiosks are secured to the wall and cannot be accessed without a key.
2.	The iPad otter box devices will be managed by the Receptionist, or the individual assigned to the front desk for the day. These staff will be asked to manage the distribution/collection of the portable devices when the customer is finished with the DIF.
3.	At the end of the day, all devices will be locked in the charging cabinet purchased specifically for this initiative.
4.	

#### Job Seeker Intake Support Task 5: Device considerations

*Where will job seekers return their devices after completing the form (if applicable)?*

1.	Job Seekers will return their devices to the staff member at the front reception desk.
2.	
3.	
4.	

Job Seeker Intake Support Task 6: *Add topic here; add as many task charts as necessary.*

1.	<i>Add as many rows to the chart as necessary to create step by step directions for each task.</i>
2.	
3.	
4.	

## **Service and Referrals.**

This section includes tasks that are necessary for staff to use the information gathered on the digital intake form to support job seekers in the next steps to connecting them with the needed support or services.

- Tracking and monitoring completion of intake form
- Using the information collected to make referrals
- Actions to take if job seeker selects “prefer to discuss with a staff member”
- *Add additional tasks here*

Service and Referrals Task 1: Tracking and monitoring when a job seeker completes the intake form

*After job seekers complete the digital intake form, how will your front desk staff manage the lobby (i.e., track when the job seeker completes the intake form, monitor job seekers who are waiting to be helped, etc.,)?*

1.	CRC staff and the receptionist will monitor foot traffic and direct customers to the appropriate DIF devices when they enter our facility.
2.	All customers will have use of the standing kiosks, the portable iPad devices or use of one of the CRC computers to complete the DIF. We have ADA compatible computers that can assist in the event a customer needs a specific accommodation.
3.	CRC staff and scheduled staff will provide necessary assistance in the event a customer needs assistance or an accommodation. These same staff will track when a job seeker completes the DIF and monitor job seekers if they require assistance or need to be helped.
4.	

Service and Referrals Task 2: Use the information collected to make a referral

*How will your office use the information collected on the intake form to connect the job seeker with the needed support or service? (i.e., make a referral, determine appropriate program)?*

1.	Upon completion of the DIF, Staff will review the intake forms and make any necessary referrals to programs.
2.	As a best practice, customers who need information on specific programming or partner resources, will be encouraged to attend one of our Orientations which they can register and attend either on Tuesday or Thursday.
3.	These orientations provide a thorough overview of programs and are helpful in having our job seekers understand the full array of services.
4.	As a means of a best practice, PACL will be discussing this very topic and the manner in which other counties make a referral to a program – what process works the best? What process is the most timely, etc.

Service and Referrals Task 3: Job seeker selects “prefer to discuss with a staff member”

*If a job seeker selects the “prefer to discuss with a staff member” response option for any of the questions on the form, who in your office will review these questions and reach out to this job seeker?*

1.	PACL Chester County has an established schedule to tend to customers that need staff assistance. The organization (Title I or BWPO staff) will be available to discuss the questions on the form with a staff member and to provide any information or assistance as requested by the customer.
2.	For topical information and general guidance, a PACL staff member will be available to provide such information.
3.	For more programmatic information, staff will encourage the customer to sign up for one of the orientations (held Tuesday or Thursday) so they can get a full overview of all the employment/training and supportive services that can be accessed by job seekers.
4.	

Service and Referrals Task 4: Digital Intake form reports

*How can your office use the digital intake form reports to increase transparency of the job seekers being served in your office?*

1.	The DIF reports will be shared with all PACL committees, staff and the LWDB to help understand the demographic of the job seekers and their needs as they enter into our office.
2.	We anticipate using this information to help develop future programming, whether it be workshops, availability of training grants/OJT's, and any necessary supportive service as requested by the customer.
3.	The form will also assist in ‘managing and coordinating’ referrals to other PA CareerLink partners.

Service and Referrals Task 5: *Add topic here; add as many task charts as necessary.*

1.	<i>Add as many rows to the chart as necessary to create step by step directions for each task.</i>
2.	
3.	
4.	



## Details of Duties

Each of the staff members in the PA CareerLink® offices has a distinctive set of responsibilities that contribute to supporting the job seeker. The following is a list of those roles and their determined responsibilities as it pertains to the operational tasks surrounding this digital intake form.

*Directions: Offices should use this section to include the different roles within their office and the responsibilities of that person as it pertains to digital intake form operations. The responsibilities in this section should reference the tasks that were described in the process/procedure section. Offices can add rows as necessary to the chart. An example has been provided. Please edit as necessary.*

Role	Responsibilities
RECEPTION	<ul style="list-style-type: none"> <li>• Greets customers entering the office; asks about their reason for visit</li> <li>• Provides overview of the digital intake form to the customer and directs them to complete the intake form</li> <li>• IF a KID/PW retrieval or new a new job seekers job seeker will be sent to CRC to complete required enrollment</li> <li>• After customer completes the enrollment/ digital intake form, Reception will determine the correct place to refer the customer (e.g. Orientation, UC, EARN,GED, etc.)</li> </ul>
CRC/SCSEP Staff	<ul style="list-style-type: none"> <li>• Will assist customer who need help with completing DIF</li> <li>• Will assist customer who require assistance with KID/PW setup or KID/PW retrieval.</li> <li>• Will assist customer with new customer PACL registration</li> <li>• Ensure referrals are made to correct staff/partners as needed</li> </ul>
Title I and BWPO Career Advisors	<ul style="list-style-type: none"> <li>• On an as-needed basis perform the same duties as outlined above – depending upon each partner’s coverage day.</li> </ul>
Title I and BWPO Leadership	<ul style="list-style-type: none"> <li>• Will ensure staffing is appropriate to ensure appropriate coverage is available for job seekers should they require assistance</li> </ul>
CareerLink Supervisor and CareerLink Administrator	<ul style="list-style-type: none"> <li>• Run Ad-Hoc repots to support to assist in determining future programming</li> <li>• Run reports per request for LWDB</li> <li>• Implement necessary protocol and process</li> <li>• Provide necessary training for all staff</li> </ul>
Customer Service Engagement Coordinator - Possible new position	Work as the lead on the DIF project for PACL Chester County to ensure DIF process is running effectively, referrals are made in timely manner, staff coverage is sufficient, ensure timely entry of paper DIFs

## Appendix

### List of Abbreviations

*Directions: The following are a list of abbreviations used in the document. Your office can add to this list if any further abbreviations or additional terms the staff would need to know to effectively complete the tasks described in this document.*

Abbreviation	Terminology
SOP	Standard Operating Procedure
CWDS	Commonwealth Workforce Development System
PII	Personally Identifiable Information
DLI	Department of Labor & Industry
LWDA	Local Workforce Development Area
WIOA	Workforce Innovation and Opportunity Act
RESEA	Reemployment Services and Eligibility Assessment
TES	Talent Engagement Specialist
TAA	Trade Adjustment Assistance
PACL	PA CareerLink
DIF	Digital Intake Form
KID	Keystone ID
PW	Password
CRC	Computer Resource Center
SCSEP	Senior Community Service Employment Program
UC	Unemployment Compensation

## Additional Resources

*Directions: Your office can use this section to include any additional resources such as frequently used documents or links that staff would need to effectively complete the processes mentioned in this document.*

Document	Use & Purpose
Digital Intake Form Training Videos	To view web-based digital intake form training videos: a) Overview, b) About Me and Personal History, c) CWDS Staff Screens, d) Maintenance of DIF Data, e) Virtual Led Instructional Training Recording. *These videos will be stored on our local PACL webpage in the staff access section for future usage/viewing
CWDS Help Section	<a href="http://www.cwds.pa.gov">www.cwds.pa.gov</a>

## Detailed Process Flow

*Directions: Your office can use this section to include your detailed office flow that was created as part of the readiness activities to implement the digital intake form.*

**SEE ATTACHMENT**