



DWFS OPPORTUNITY PROCESSING OUTLINE: ONLINE ELIGIBILITY

DWFS TEAM MEMBER Tony New Hire	JOB POSITION CSRT	DAYS WITH THE COMPANY 60 days
STEP 1: TONY'S INTRODUCTION <ul style="list-style-type: none"> • WHO ARE YOU? • WHAT'S YOUR POSITION? • WHAT'S YOUR QUESTION? 	STEP 2: PARTICIPANT FEEDBACK <ul style="list-style-type: none"> • CLARIFYING QUESTIONS • TONY'S IDEAL OUTCOME • BARRIERS & CHALLENGES • SOLUTIONS 	STEP 3: BEST-PRACTICE SPEAKER ODETTE FLORES TALKS ABOUT BEST-PRACTICES BEHIND ONLINE ELIGIBILITY.

HOW DO I: (PRESENTED BY TONY)

- How do I accurately capture program eligibility online while working remotely?

CLARIFYING QUESTIONS: (ASKED BY PARTICIPANTS)

- What is online eligibility?
- What programs?
- What do you mean by "capture"?
- Does your project already have a remote process in place?
- Do you have electronic signature capability?
- How familiar are you with your program's eligibility requirements?
- Is eligibility the same as suitability?
- Do you have a scanner?
- Do you have Google Voice?
- What methods of contact are you currently employing?
- What process(es) did you have in place previously to determine eligibility?
- Has your leadership provided any guidance on what is expected during this time?
- Which documents are difficult for you to obtain?
- Do you have adequate technology? Reliable internet, scanner, printer, electronic version of application...
- How connected are your customers with technology?

MY IDEAL OUTCOME IS: (PRESENTED BY TONY)

- Generate a steady volume of online enrollments and maintain an accuracy rate of 95% or better.

WHY IS IT SIGNIFICANT TO ANSWER TONY'S QUESTION? (ANSWERED BY PARTICIPANTS)

- To meet performance goals
- Everyone is working remotely now
- Unemployment rate is increasing
- To stay compliant
- To help people
- Writing is on the wall – will most likely be moving to online enrollment and more online services
- To perfect our craft
- To service the community
- To position us better for when we return to the office
- Maintain continuity during the current health crisis
- To ensure our applicants of the services we can provide
- To pat ourselves on the back

BARRIERS & CHALLENGES – WHAT ARE TONY’S BARRIERS & CHALLENGES? (ANSWERED BY PARTICIPANTS)

- Technology, unreliable internet
- Customer lack of tech tools and/or knowledge
- Complying with PII policy/requirements
- E-signature capability
- Takes time to learn the programs completely
- Customers may not have reliable methods of getting the information to him
- Marginalized groups who do not have documents
- Time lags leading to problems connecting to potential customers
- Lack of personal touch
- Customers do not know how to get involved/contact us
- Customer uncertainty, in survival mode, do not have the energy nor time for paperwork
- Marketing of online services
- Lack of customer drive
- Language barriers

SOLUTIONS – WHAT ARE SOLUTIONS TO TONY’S POTENTIAL BARRIERS AND CHALLENGES?

- Mail paper application
- Find out what other projects are doing
- Create WIOA checklists for documentation
- Create a JotForm that lists all the documents needed with pics that convert to PDF
- Make the process as simple as possible
- Obtain fillable forms/docs to get to customers
- Find out what technology your customers have or have access to
- Create instruction forms for customers
- Encourage customers to enlist help of friends/family that are tech savvy
- Communicate with participants to share how to contact staff, how to access online services, and how to contact via phone to build or maintain relationships and address concerns or needs
- Utilize community partners
- Determine tech capabilities early on/in the beginning

BEST PRACTICE SPEAKER: (ODETTE FLORES ANSWER TONY’S QUESTION)

- **BACKGROUND:**
 - Two years in Workforce Development
 - Human Resources background
 - Transportation operations, dispatching and safety
 - Instructor at 2 local colleges for 9 years
- **CURRENT ROLE:**
 - Street Team Lead in El Paso (Borderplex)
- **WHAT MAKES YOU AN EXPERT?**
 - 2008: chosen to work with IT to develop the *entire* online program (brand-new) for the college
 - Turned all curriculum, assignments, attendance, and grading to virtual
 - Trained all the other instructors
 - Continued to update online curriculum until the college closed in 2015
- **WHAT IS THE BEST PRACTICE?**
 - Communication! Talk to the customer, really get to know the person, then gauge how to conduct eligibility, what steps to take, etc.
 - Ensure customers have a valid email address and share documents needed so they have them ready when necessary (do this *prior* to the eligibility appointment)
 - Prescreen customers to ensure they have all the necessary documentation *prior* to scheduling the appointment. Ask if their documents are unexpired and let them know they will need to provide digital copies of each document. Walk them through the process of taking pictures of their documents and emailing them.

- Brainstorm possible scenarios your customers might experience. Do they have a smartphone? A computer? Must have several methods of obtaining signatures (Adobe Fill & Sign) (DocUSign) – find out from your Board what “type” of signatures are allowed/accepted
- Schedule appropriately (this is different for a virtual environment). Give yourself ample time to complete the eligibility. It takes longer virtually!
- Discuss timeframes and expectations of virtual eligibility with the customer; ensure the customer has the time to complete it without interruptions (recommended: 2 hours)
- Be thorough!! Don’t rush, answer customers’ questions
- Be flexible!! Like you, the customer is venturing into the unknown. Be prepared to answer even the simplest questions
- **ADDITIONAL QUESTIONS / QUESTIONS FROM THE AUDIENCE:**
 - Do you have any tips on earning customers’ trust while using Google Voice?
 - Be friendly and patient, answer all questions
 - Are there any easy-to-use, secure systems for sending personal documents?
 - Currently, we’re using our work email and then reassuring our customers that we will delete their email as soon as we are done with it
 - When customers send in applications, is there a secure location to upload it?
 - Use a VPN and upload to your electronic case management system
 - Do you walk customers through the process of password protecting their email with documents?
 - Have not yet because I don’t want to make it harder for those with tech issues
 - How are you completing TABE testing?
 - We do it *after* eligibility – plus, we’re still waiting on the State’s response; however, we’re also exploring other options (i.e., Connexia or Provelt)
 - What apps/websites can you recommend for online apps?
 - Adobe Fill & Sign (Board preferred), but also DocUSign (staff tested with each other – DocUSign is easier for Android devices than Apple ones)
 - What do you do about missing information on the application when the customer refuse to answer certain questions (i.e., SSN)?
 - Staff fills the entire application out (asks all the questions), then provides it to the customer to sign
 - What do you suggest we do to overcome the difficulty of gaining participants’ trust in a remote setting?
 - Explain even the simplest questions, take as much time as needed, answer all questions no matter how big or small
 - Is DocUSign free?
 - Yes
 - What is an alternative to staff completing the application? To ensure nothing is left blank?
 - JotForm – just send the link to your customer and include mandatory categories (then it can’t be submitted if any of those categories are left blank)
 - Do you video conference with customers?
 - Yes, if customers are comfortable with it and have the capability; however, most eligibility is done over the phone
 - If participants have trouble accessing internet, is it our responsibility to keep following up or do we put ownership on them to see if they really want to participate?
 - We should provide as many options as possible to make it easier for customers; it’s our responsibility to eliminate as many barriers as possible
 - Are projects lowering enrollment requirements due to COVID-19?
 - Not currently (ours has not and I don’t know of any others who have). Our number of enrollments has slowed down, but our requirements have not changed
 - Do you ever help with a free referral or free service before eligibility is complete for those with no technology while you are trying to find the right resources for them?
 - We refer customers to a state service that offers free cell phone as well as always refer to other community programs if WIOA is unable to assist
 - How do you let people know, or market yourself, for virtual enrollments?
 - Lot of contact with local CBOs, constant flow of referrals, use UI list

- How do you capture demographic info in the state system?
 - We ask! Intake questions are part of application, so just ensure all are answered.
- Customers have to be logged in *and* staff has to be logged in, how do you suggest assisting customers who are unable to log in?
 - Print the IEP and demographics info, then have the customer e-sign PDF versions
- Since there isn't currently any foot traffic or partner visits, where should we recruit?
 - Reach out to CBOs for youth (i.e., foster youth), UI list for adults. Work closely with BES to fill positions and/or set up work-based learning (businesses reach out to BES and/or Board).
- Is it appropriate to run reports for people who didn't positively exit to re-enroll them since we already have a lot of their information?
 - Depends. Why did they exit? Unforeseen circumstances or choice? You don't want double negatives, but *do* want to help the community – so don't do it *just* because it's easier, do it because it makes sense
- What other ways are there to conduct outreach during the current health crisis?
 - Social media
- Is it appropriate to ask for reverse referrals from employers we know are hiring?
 - Absolutely!