# NEWDB MEMO 05-2021

**Date:** December 8, 2021

**To:** Dynamic Workforce Solutions

**From:** NEWDB

**Subject:** Virtual Enrollment Procedures

# Message

The procedures outlined in this memo are an effort to extend the reach of WIOA Title-I services by leveraging technology resources to allow enrollments to be conducted virtually when a participant is unable to access the American Job Center network through traditional methods. These methods are reserved for individuals unable to access resources and are not intended to become the normal method of operations.

# Technology Resources

The resources below are examples of tools that may be utilized for virtual communications.

* Tiny Scanner – see here for [Apple](https://apps.apple.com/us/app/scanner-app-scan-pdf-document/id595563753); see here for [Android](https://play.google.com/store/apps/details?id=com.appxy.tinyscanner&hl=en); Tiny Scanner enables staff or clients to take a picture of a document and convert the picture into a PDF. This is a free app on both the Android and Apple platforms.

# Security

Documents with participant Personal Identifiable Informationmust be transmitted in a secure way. This security will be ensured by the following processes:

* Navigators will inform client that:
  + The information they are sending, such as their Eligible to Work documents and their Demographic Snapshot information, contains Personally Identifiable Information;
  + This sending and receiving of this information relies on basic email security, and is not encrypted;
  + The participant must inform the Career Navigator that they are aware of the risks associated with transmitting this information via email or text message, and that they grant consent.
* Verification of this message will be uploaded by uploading a signed “Virtual Enrollment Agreement”.

# Process Requirements

The Career Navigator will inform the individual that the enrollment will be provided virtually and provide a clear explanation of the process before the virtual enrollment meeting is scheduled.

The Career Navigator will verify that the individual understands that the enrollment will be completed virtually (i.e. phone, Skype, Zoom, FaceTime, Facebook Messenger, etc.). The Career Navigator will verify that that the participant has the applicable technology to receive, electronically sign, and return all applicable paperwork in a clear format during the enrollment. The Career Navigator will schedule a meeting and ensure that there will be adequate time to complete the enrollment process. The participant must be provided with the Virtual Enrollment Agreement and provide a signed copy to the Career Navigator confirming that they are aware of the risks associated with the transmission of the Personal Identification Information via email before the enrollment meeting takes place.

During the virtual enrollment meeting, all eligibility, enrollment, IEP/ISS, and demographic snapshot documentation must be completed and reviewed with the individual while on the virtual platform to ensure that information is true and accurate. While it is preferential to utilize screen share capacity during the virtual meeting to allow for a digital signature, when it is not possible to do so a signed “printed” copy of the Demographic Snapshot and IEP will be acceptable. Documentation must be uploaded into OKJobMatch within 48 hours of receipt.

All coordination must be emailed from the assigned email address of [enrollments@northeastworkforceboard.org](mailto:enrollments@northeastworkforceboard.org). Each Career Navigator will be responsible for retrieving and uploading documentation to OKJobMatch after the virtual interview. The email must be deleted from the email inbox and the deleted folder by 5pm the following day.

# A “Virtual Enrollment” program note must be entered and must include the following:

* Document why the virtual enrollment was necessary and the client was not able to meet with the CN in person at any of the offices in the Northeast Workforce area.
* The date documentation was emailed to participant, received from the participant, and uploaded to OKJM.
* List of documentation included in email (Driver’s License, Social Security Card, Selective Service verification, local forms, and any other required documentation.)
* Confirmation that email has been deleted.

# Uploads:

* Virtual Enrollment Agreement
* Authorization to Work, Age documentation, Selective Service documentation, Veteran’s documentation, etc.
* Eligibility Packet: Eligibility form, eligibility documentation
* Demographic Snapshot: OKJM - PDF printout
* IEP development packet or Youth ISS packet
* OKJM IEP/ISS - PDF printout