

**Department of Economic Opportunity (DEO) America's Job Centers of California (AJCC)**  
**Technical Assistance Checklist PY 2022-23 HOME LA:RISE Program**

AJCC: \_\_\_\_\_ Participant Name \_\_\_\_\_ SSN: \_\_\_\_\_

CaJJOBS #:	Enrollment Date:	Exit Date:
<b>File Type</b>		
<input type="checkbox"/> Yes <input type="checkbox"/> No Electronic File (If electronic file, uploaded documentation will be reviewed via CaJJOBS for all program requirements)		
<b>Program Eligibility</b>		
<input type="checkbox"/> Yes <input type="checkbox"/> No Program Eligibility Checklist on file, signed and dated by Social Enterprise partner and participant <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A If electronic file, was documentation appropriately uploaded into CaJJOBS <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A If so, was the correct naming convention used for document.		Requirement Met: <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>
<b>CaJJOBS Application</b>		
<input type="checkbox"/> Yes <input type="checkbox"/> No Staff /Case Manager Signature <b>Date:</b> _____ <input type="checkbox"/> Yes <input type="checkbox"/> No Application Reviewer Signature <b>Date:</b> _____ <input type="checkbox"/> Yes <input type="checkbox"/> No Participant Signature <b>Date:</b> _____ <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Application is reviewed and approved prior to providing services <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Reviewer is not same as staff/case manager <input type="checkbox"/> Yes <input type="checkbox"/> No Homeless status marked as "Yes" in Application <input type="checkbox"/> Yes <input type="checkbox"/> No Medical and Disability related questions have been redacted from Application (Applies to hard copy files only) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Was documentation appropriately uploaded into CaJJOBS		Requirement Met: <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>
<b>Case Notes and Documentation</b>		
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Are case notes detailed, clear, and fully developed? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Do case notes detail co-case management engagement with SE partner(s)? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Do Activity codes match information in the case notes? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Do case notes include a plan of activity for the customer? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is confidential health information & Participant PII secured and kept out of file? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is documentation supporting services provided on file? (i.e. Job Referrals, IEP) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Was documentation appropriately uploaded into CaJJOBS		Requirement Met: <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>
<b>Training Services</b>		
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is training need and benefit clearly documented? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is local LMI used to link training to in demand occupations? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is a comprehensive assessment used to identify training course? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is training provider performance data on file? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Are attendance records on file? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is the course Certificate of Completion on file? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is customer choice requirement met? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is link to employment established? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Are case notes acceptable? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Is a complete, signed, and dated ITA on file? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Are documentation of payments on file?		Requirement Met: <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No  Cohort Training: <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>
<b>On the Job Training (OJT)</b>		
<b>Employer Name:</b> _____ <b>Address:</b> _____		Requirement Met: <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>
<b>OJT Info:</b> Job Title: _____ Total Training Hrs.: _____ Start Date: _____ End Date: _____ Hourly Wage \$ _____ Reimbursement Rate: _____ % Maximum Reimbursement \$ _____		
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A OJT need and benefit established and documented through assessment? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Participant has the skills and qualifications to successfully complete the OJT? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Business meets the requirements of OJT? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A If business previously participated in OJT, do they meet employee persistency rate of 75% over a 12-month period? (If no, waiver is required) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A OJT contract signed/dated prior to OJT start and uploaded to CaJJOBS? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A OJT training plan completed, signed/dated prior to OJT start, and uploaded to CaJJOBS?		

<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> IEP supports the OJT and is developed and signed prior to OJT start? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Employer is committed to hiring participant upon successful OJT completion? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> AJCC is monitoring OJT progress to ensure goals are met? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Progress report & invoice submitted every pay period & uploaded to CalJOBS. <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Final evaluation completed and uploaded to CalJOBS? MUST include whether participant satisfactorily met the training objectives. <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> OJT does not exceed one year? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was the participant hired after OJT completion? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> If AJCC is providing a 90% reimbursement rate, is DEO/EBD approval on file? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Are case notes acceptable?	
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Supportive Services	
<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Are Sup. Services provided for participation in LA:RISE career and/or training activities? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Are Supportive Services provided reasonable? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Are Supportive Services provided in a timely manner? (3-day turnaround timeframe) <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> If not, has the agency case noted why the 3-day timeframe was not met? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is support documentation uploaded into CalJOBS? (e.g. receipts) <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Are appropriate Supportive Services activity codes opened in CalJOBS? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was documentation appropriately uploaded into CalJOBS?	<b>Requirement Met:</b> <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>

Incentives	
<b>Employment Retention</b> <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Documentation, such as a paystub was used to verify attainment of employment? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> First paycheck <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Documentation uploaded into CalJOBS for verification  <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> First month on the Job <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Documentation uploaded into CalJOBS for verification  <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Second month on the Job <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Documentation uploaded into CalJOBS for verification  <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Third month of Employment and participation in an AJCC Employment <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Retention Support Activity <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Documentation uploaded into CalJOBS for verification  <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Six months of Employment and participation in an AJCC Employment <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Retention Support Activity <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Documentation uploaded into CalJOBS for verification  <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Retention milestones were recorded, and Tracking Log completed  <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was documentation appropriately uploaded into CalJOBS	<b>Requirement Met:</b> <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>

Performance Outcomes	
<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is documentation supporting unsubsidized employment during exit on CalJOBS? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is participant placement in a training related occupation? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Has participant attained a recognized postsecondary credential or secondary school diploma, or equivalent, during participation or within 1 year after exit? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> If yes, has Credential Attainment been reported accurately and uploaded to CalJOBS? (Codes requiring CA: 225, 300, 302, 305, 306, 322, 323, 324, 325, 328, 330) <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is documentation supporting Credential Attainment uploaded to CalJOBS? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Has participant advanced in or completed a training or educational program where advancement or completion qualifies as a Measurable Skills Gain? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> If yes, has Measurable Skills Gain been reported accurately in CalJOBS? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is documentation validating type of Measurable Skills gain uploaded CalJOBS? (Codes requiring MSG: 225, 300, 301, 304, 305, 306, 320, 322, 323, 324, 325, 328, 330)	<b>Requirement Met:</b> <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>

<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is 1 <sup>st</sup> Quarter Follow-Up Completed and is Supplemental data uploaded to CalJOBS to support Follow-up status (Employment verification, check stubs, etc.) for all applicable quarters?	
<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is 2 <sup>nd</sup> Quarter Follow-Up Completed and is Supplemental data uploaded to CalJOBS to support Follow-up status (Employment verification, check stubs, etc.) for all applicable quarters?	
<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is 3 <sup>rd</sup> Quarter Follow-Up Completed and is Supplemental data uploaded to CalJOBS to support Follow-up status (Employment verification, check stubs, etc.) for all applicable quarters?	
<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Is 4 <sup>th</sup> Quarter Follow-Up Completed and is Supplemental data uploaded to CalJOBS to support Follow-up status (Employment verification, check stubs, etc.) for all applicable quarters?	
<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> If participant was employed during follow-up, was employer information added for each applicable quarter?	

Case Closure	
<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was this file a positive case closure? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> If participant was exited as employed, was employer information added? Employer Name: _____ Start Date: _____ <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was case closure completed with appropriate documentation (i.e. school status, employment verification)? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was the participant exited as a global exclusion? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> If so, is documentation supporting a Global Exclusion on file (i.e. incarceration, institutionalization, death etc.)? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was documentation appropriately uploaded into CalJOBS	Requirement Met: <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>

Follow-Up Services	
<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Were Follow-Up Services offered to participant upon employment & program exit? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Are any Follow-up services provided? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> If so, are Follow-up services fully documented in CalJOBS, in case notes, with appropriate CalJOBS codes? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was documentation appropriately uploaded into CalJOBS?	Requirement Met: <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>

Co-Enrollment: <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>	
Program Enrolled: _____ Agency: _____ Co-Enrolled Into: _____ Agency: _____ <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> Is need documented? (Customer choice, customer benefit, funding) <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> Are separate files kept per funding stream? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> Are services provided without duplication between programs? <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b> Was documentation appropriately uploaded into CalJOBS	Requirement Met: <input type="checkbox"/> NA <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Comments:</b>

<b>Certification of Review</b> DEO REPRESENTATIVE NOTES:		
All Requirements Met: <input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <b>NOTES:</b>		
_____ <b>AJCC REPRESENTATIVE PRINT NAME</b>	_____ <b>SIGNATURE</b>	_____ <b>DATE</b>
_____ <b>DEO REPRESENTATIVE PRINT NAME</b>	_____ <b>SIGNATURE</b>	_____ <b>DATE</b>