MANDATED USE OF VOSGREETER MODULE IN CALJOBS^{SM}

EXECUTIVE SUMMARY

This policy provides the guidance and establishes the procedures regarding the use of the VOSGreeter module within the CalJOBS system. This policy applies to all comprehensive and affiliate America's Job Center of California (AJCC) locations, and is effective October 1, 2018.

This policy contains only state-imposed requirements.

This Directive finalizes Workforce Services Draft Directive *Mandated Use of VOSGreeter Module in CalJOBS* (WSDD-174), issued for comment on December 16, 2017. The Workforce Development Community submitted 13 comments during the draft comment period. A summary of comments, including all changes, is provided as Attachment 1.

 Retain this Directive until further notice.

REFERENCES

- WIOA (Public Law 113-128)
- Workforce Services Directive WSD16-23, Subject: *Mandated Use of One Integrated Data System – Direct Data Key Entry Into CalJOBS* (June 20, 2017)

BACKGROUND

The VOSGreeter Module is designed to assist AJCC staff with recording visitor traffic electronically in-lieu of a paper sign-in sheet. The module allows offices to track the number of individuals visiting an AJCC, and the purpose of their visit. In September 2016, the Central Office Workforce Services Division (COWSD) launched the VOSGreeter module as a pilot program to eight volunteer Local Workforce Development Areas (Local Area). The eight Local Areas were Imperial County Workforce Development Office, Los Angeles County Workforce Development Aging and Community Services, Workforce Alliance of North Bay, Merced County Department of Workforce Investment, Orange County Community Services Agency Special

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The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.

Programs, County of San Benito Community Services and Workforce Development, San Joaquin County Employment and Economic Development, and the Santa Ana WORK Center.

Through the pilot program, the module has been developed to capture data at a state and Local Area level. The module was implemented to enhance customer service and improve service integration for the AJCCs, and obtain data that can potentially assist with cost allocations within respective offices. The EDD, the California Workforce Development Board, and the California Labor and Workforce Development Agency have seen the module, and how it functions in the AJCCs. A collaborative decision was made to make the module mandatory after an extensive review of functionality and the available data.

POLICY AND PROCEDURES

The phased statewide implementation of VOSGreeter will begin in April 2018. The COWSD CalJOBS Operations Unit will begin transitioning the AJCCs in phases by Local Area. This Directive provides definitions related to VOSGreeter, the implementation process, as well as detailed user guides and additional reference tools.

DEFINTIONS

A. **Local-level Visit Reason**
   Local-level Visit Reasons are created by Local Areas for display on the Visitor Kiosk (see definition below). Local-level Visit Reasons are customizable to meet the Local Area's needs at an office level. These visit reasons are displayed after the visitor enters their identification information into the kiosk. The Local-level Visit Reasons should be easy to understand and represent the most common reasons people visit the office.
   Local Areas are responsible for creating, and maintaining the Local-level Visit Reasons for each of their offices.

   Tip – When setting up VOSGreeter for the first time, start with a small number of visit reasons (around five reasons), as too many choices may confuse visitors. As time progresses and Local Areas are able to assess their VOSGreeter data, Local-level Visit Reasons can be added, removed, or modified to fully support the office's service delivery model.

B. **State-level Visit Reason**
   State-level Visit Reasons are associated to each Local-level Visit Reason. The State-level Visit Reasons provide Local Areas with complete autonomy over their Local-level Visit Reasons, while allowing the state to gather and aggregate data based on standardized visit reasons. Local Areas are not required to have a Local-level Visit Reason for each of the State-level Visit Reasons.

   Tip – The CalJOBS system identifies State-level Visit Reasons as "Default Visit Reasons."

C. Visitor Kiosk
The Visitor Kiosk is a dedicated computer located at the front of the office. The Visitor Kiosk displays a welcome screen and asks for the visitor's identification information. Once their information is entered, the Local-level Visit Reasons configured for that office will display for selection.

Tip – The Visitor Kiosk can be any type of computer or tablet that has access to the internet. It is recommended that the Visitor Kiosk is touchscreen, but it is not required.

IMPLEMENTATION OF VOSGreeter

A. Initial Setup
All Local Areas that were not part of the pilot will go through a one-time set up process. A VOSGreeter Visit Reason Intake Form (Attachment 5) will be sent to associate Local-level Visit Reasons with the State-level Visit Reasons. The VOSGreeter State-level Visit Reasons Descriptions document (Attachment 3) contains a definition for each State-level Visit Reason, as well as examples of Local-level Visit Reasons that would be associated. Once the Visit Reason Intake Form has been completed, it will be submitted to the CalJOBS Operations Unit for review. Once reviewed, the form will be returned to the Local Area, which can then begin creating the Local-level Visit Reasons in the system. This process is a one-time event. However, the CalJOBS Operations Unit will conduct a monthly review to ensure all Local-level Visit Reasons are associated to the appropriate State-level Visit Reasons.

If at any time the Local Area determines that their Local-level Visit Reasons need to be associated to a different State-level Visit Reason, the VOSGreeter Visit Reason Re-Association Form (Attachment 4) should be completed. This form is designed to connect a previously created visit reason to a different State-level Visit Reason to ensure proper reporting of office visit reasons.

B. Visitor Kiosk Setup
After the completion of the visit reason association process, a Visitor Kiosk will need to be set up in CalJOBS to begin the tracking of visitors. AJCCs will be able to set up their kiosks with visit reasons submitted through the intake process outlined above, and establish their VOSGreeter service delivery model (staff-assisted versus self-assisted).

The VOSGreeter module is not a replacement for entering services or activity codes into the individual's account within CalJOBS. Staff will need to enter activity codes for services provided in the appropriate Title I or Title III program applications.

C. Reports
Reports are available to view the results of VOSGreeter. AJCC staff are able to log into CalJOBS under Detailed Reports to generate one or more of the following reports:

- List of All Visitors

- Summary by Visit Reason
- Visits by Hour
- Visits by Weekday

D. Equipment

The equipment necessary to use the module is any computer or tablet able to connect to the internet and connect to CalJOBS. Funds have been allocated to all Local Areas via their subgrants for the purchase of the necessary equipment to be used with VOSGreeter. Comprehensive and affiliate AJCCs will need to go through the normal procurement process to procure the equipment by September 30, 2018. Questions regarding procurement should be directed to your Regional Advisor.

E. Training

Training for the Visitor Kiosk setup, and use of the VOSGreeter module will be available through webinar based trainings. The COWSD Capacity Building Unit (CBU), and the CalJOBS Operations Unit will work together to send out phased training date(s) to coincide with the phased implementation of the VOSGreeter module. If a scheduled training date cannot be attended, a recorded webinar will be made available by CBU. As an additional resource, the CalJOBS^{SM} VOSGreeter User Guide (Attachment 2) is attached to this Directive.

ACTION

Bring this Directive to the attention of all affected staff.

INQUIRIES

If you have any questions, contact the CalJOBS Operations Unit at 916-653-0202, or by email at caljobsadmin@edd.ca.gov.

/S/ JAIME L. GUTIERREZ, Chief
Central Office Workforce Services Division

Attachments are available on the internet:

1. Summary of Comments
2. CalJOBS^{SM} VOSGreeter User Guide
3. VOSGreeter State Level Visit Reasons Descriptions
4. VOSGreeter Visit Reason Re-association Form
5. VOSGreeter Visit Reason Intake Form