

Guidance on the Use of the PA CareerLink® Digital Intake Form

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.

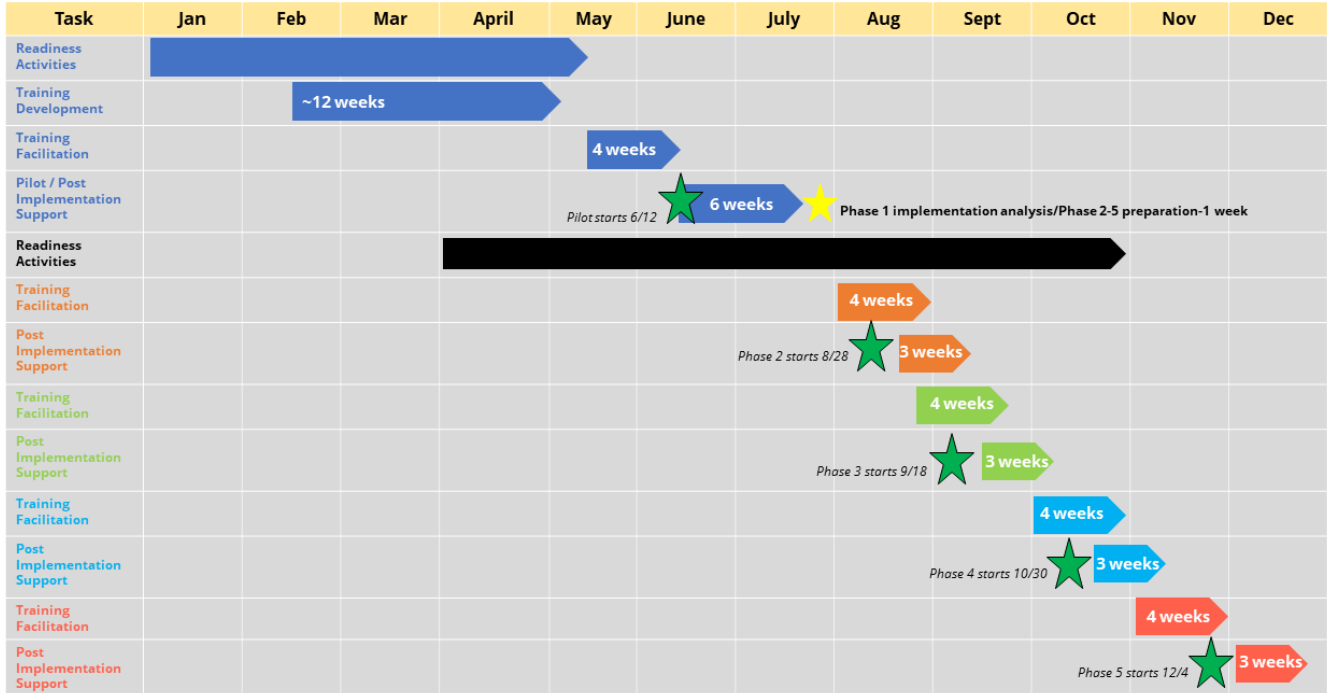
As per [System of Record Policy directive](#), all workforce development data and activities must be entered into CWDS/PA CareerLink® to ensure compliance with federal and state statutes, regulations, and policies within 30 days of actual date of occurrence. For best practices, we strongly recommend 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.

Attachment A

Digital Intake Phases Statewide Roll-Out Timeline

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



Digital Intake Phased Roll-Out Approach

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

Phase 1

Pilot Offices:

1. Pittsburgh
2. Bradford-McKean
3. Cumberland
4. Lawrence
5. Lehigh




Phase 2

LWDBs:

1. *Three Rivers
2. *North Central
3. *South Central
4. *West Central
5. Pocono Counties

**The following LWDBs participated in phase 1 pilot*



Phase 3

LWDBs:

1. Central
2. Luzerne /Schuylkill
3. Northwest
4. Southwest Corner
5. Berks
6. Bucks County
7. Chester



Phase 4

LWDBs:

1. Delaware County
2. Lackawanna County
3. Lancaster County
4. Montgomery County
5. Northern Tier
6. Southern Alleghenies
7. Westmoreland /Fayette
8. Tri-County



Phase 5

LWDBs:

1. Philadelphia

