# Texas Workforce Commission Adult Education and Literacy



# Fall Institute 2020 Handout

September 16, 2020

Day 2, Session 7

# Secure Remote Intake Process Using DocuSign

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Session Description: Grayson AEL has created a more than 30-page internal SOP regarding the process of remote intake. It includes: scheduling the intake appointment; conducting the intake appointment over zoom, using DocuSign; completing the assessment w/detailed steps for each assessment (TABE, CASAS, & Best Oral), a link to a living class schedule document,

community WIFI, Data entry steps, languages spoken by staff, and step by step PIRL instructions. We will also cover using zoom as a "remote" office.

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#### Introduction

Ashley Trevino, Director of Adult Education and Literacy - Grayson College

- Serves Cooke, Grayson, and Fannin counties
  - o Total population ~ 200,000
- Also serves Collin county
  - o Total population ~ 1,035,000

# **Remote Intake Process Goals**

- Information security (PII)
- Collect all grant-required documentation
- Simple as possible for team and participants
- Create PASES Policy and Procedure document as a step by step "one stop shop"
- Create framework of support for team

#### **Zoom Virtual Office**

- Staffed M-Th 8am-8pm
- Lobby
- Breakout rooms

- Intake/Assessment appointments
- Leadership/IT help
- Meetings
- Classes

#### **Remote Intake Process Overview**

- Participant contact
  - o Pre-screened for remote intake
  - Scheduled for intake and/or assessment
  - o Given information about intake process
  - o Sent intake appointment reminder e-mail
- Intake
  - o Send email with Zoom link and intake process reminders
  - o Zoom "virtual office"
  - Intake done through DocuSign
  - o Assessment completed, or appointment made
- After assessment
  - o Participant class assignment
  - o Results sent to data coordinator/instructor, encrypted by 7zip
  - o Teacher sends "Welcome" email
- Data collected
  - o PIRL sent by DocuSign
    - Includes signature, ID, and staff determined eligibility

Minors only: court order, ISD withdrawal form, guardian signature lines

## **Remote Intake Screening**

- 19 years or older
  - If no, schedule appt with guardian, check for ISD withdrawal form
- Technology
  - o Laptop, desktop, phone\*, or tablet\*?
    - \*Cannot be used for TABE or CASAS
- Internet
  - o If no, refer to free community wifi list
- Email address
  - o If no, help participant create @gmail.com account

# **Intake Preparation Information**

- Participant-Given Information
  - o SSN or ITIN
  - o Picture of ID ready
  - o Computer on
  - o Email pulled up
- Information provided 3 times
  - When scheduling intake
  - o On intake appointment reminder email
  - o On Zoom link email

## Intake Schedule - Google Doc

8/31 -- Monday http://intake.gcael.com/ Intakes Please include: Time; IS name; participant name, phone number, and email; and service needed (intake, BPO, CASAS, TABE, ect) 9:30 AM Carmen & Gisell- ESL Intake+BPO- Elsa ( 469 Domail.com DocuSign Sent.Rescheduled for 11 am today NO SHOW x2 9:30 AM Fatima(no show) - Saira - ESL Intake+BPO- Sherien Serien -214 436 7055 DocuSign Sent 9:45 am (TEXOMA-Debbie-GED)- Ange (903 @gmail.com)--no show 10:00 AM Saira (switched with Carmen) -ESL Intake+BPO-Xia (Sophia @vahoo.com -214 DocuSign Sent 11:15 am (TEXOMA-Debbie)- Michelle @gmail.com Just needs to test GED)-- ✓ Gainesville ABE AM/PM 12:00 PM - Fatima (Gisell took the appointment) TABE-Keumyong 469 മgmail.com 12:00 PM Mariella/Plereah - Vallejo . Rocio TABE Reading Only -469 Canceled rocio 1:15 pm (TEXOMA-Esmeralda)-ESL Azucena (214-Cancelled appt on 8/27/20 due to a computer part not arriving on time. ★ ✓ SHA Bridge AM 2:45 pm (TEXOMA-Esmeralda)-Math TSI Ashley (903) @gmail.com) She rescheduled due to a teacher conference with her child's teacher last Thursday. \*--Completed paperwork but had to abort test due to internet connection 3:00 Angela Aguirre - Intake + BPO - Zonia @gmail.com zonia DocuSign Sent \* 5- Saira- TABE READING Only- Fei Yu-@gmail.com-1019 6:00 pm - Fatima-TABE Only - Erla agmail.com ELAZO4 SOAP5793 5:45 pm Beatriz - Intake + HSE Francisco @vahoo.com 2144 DocuSign Sent Helpful link(s): https://wbte.drcedirect.com/TABE/#portal/tabe/595219/adminId=59521 \*Beatriz will start Intakes, BPO & TABE @ 5:45pm \* Fatima will be out today

#### **Intake Process**

- Intake appointment reminder sent
  - o Day and time
  - o Prep information
  - o Program contact information
- Zoom link to registration/assessment
  - o Instructions for Zoom
  - o Prep information
  - o Zoom virtual office
- DocuSign link ready
- Put in Zoom breakout room
- Before starting, verify participant has picture of ID and SSN/ITIN available
- PIRL, staff determined eligibility completed
  - o Intake Specialist
- Signature, ID uploaded
  - o Participant
- Sent to Data Coordinator

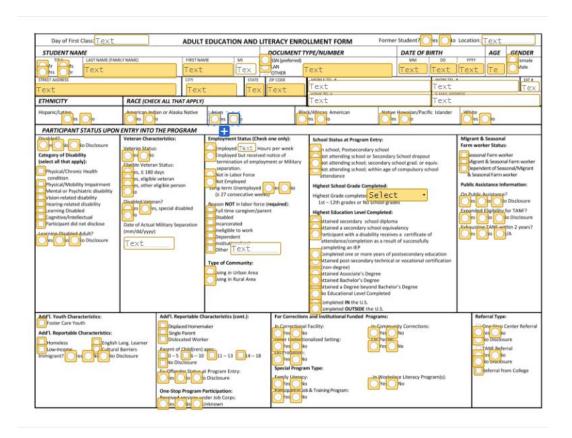
# **DocuSign Templates**

#### **Templates**

- 19+ and minor
- Both include:
  - o PIRL
  - o Staff determined eligibility
  - o Participant ID upload
- Participant signature

#### Minor includes:

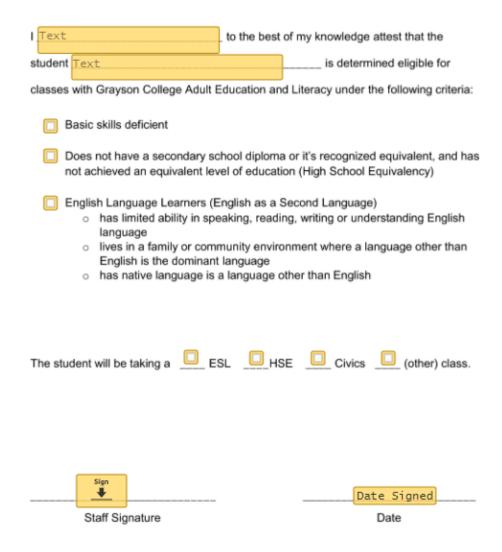
- Court order upload
- ISD withdrawal form upload
- Guardian signature



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PARTICIPANT ACKNOWLEDGEMENT AND RE	LEASE OF INFORMATION								
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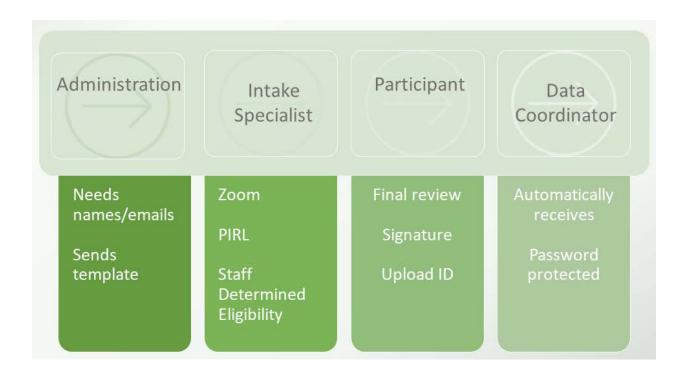
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#### Staff-Determined Eligibility



# **DocuSign Envelope Path**

- Administration starts process
- Intake Specialist
- Participant
- Participant's guardian (minor only)
- Data Coordinator

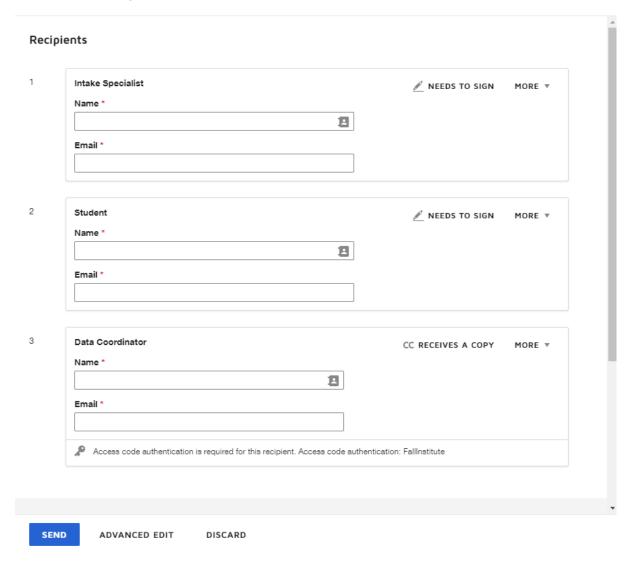


# Intake scheduling?

#### **Administration**

- One account
- Selects appropriate envelope
- Enters names/emails of recipients
- Last name in header of email

#### Fall Institute Template

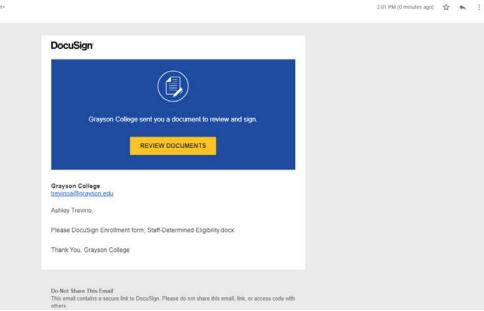


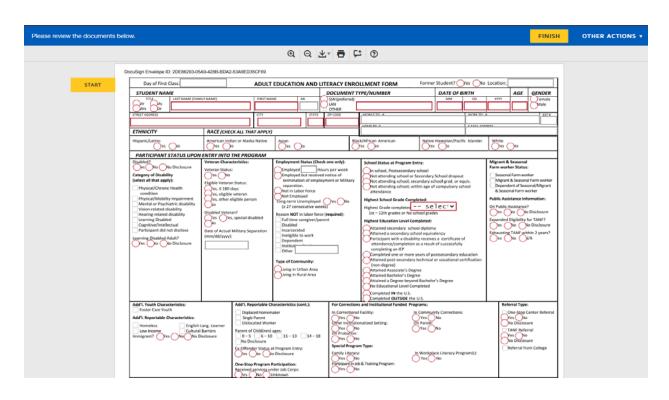
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# **Intake Specialist**

- Receives all envelopes in morning
- Shares screen via Zoom
- Completes PIRL and Staff Determined Eligibility
- Clicks "Finished", automatically sent to participant





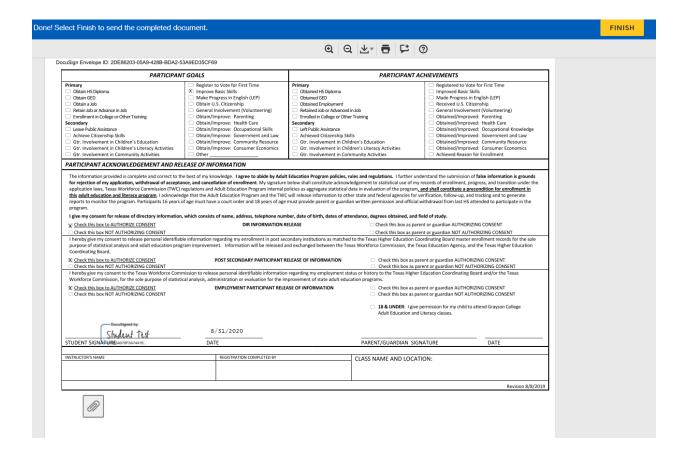


# **Participant**

- Verify data accuracy
- Electronically sign
- Upload ID
- Click "Finished", automatically sent to Data Coordinators

DocuSign Envelope ID: 2DE86203-05A9-428B-BDA2-53A9ED35CF69

Day of First Class: ADULT EDUCATION AND LITERACY ENROLLMENT FORM Former Student? ☐ Yes ☑ No. Location: ☐														
STUDENT NAME			DOCUM	DOCUMENT TYPE/NUMBER DATE			DATE OF E	DATE OF BIRTH			GENDER			
X Mr	LY NAME)	Stud		МІ	X: SSN (pref		111-11-1111		01	01	1980	40	☐ Female ☑ Male	
555 Main Street		Plano TX			75074 214-222-2222				# EXT II					
ETHNICITY	RACE (CHECK ALL THAT APPLY)				HOME TEL.#					DRESS				
Hispanic/Latino ☐ Yes ☒ No	American Indian or Alaska Native						Native Hawaiian/Pacific Islander ☐ Yes ☐XNo		White   ☐ No					
PARTICIPANT STATUS UPON	ENTRY INTO THE PRO	OGRAM									·			
Disabled? Yes X No No Disclosure Category of Disability (select all that apply): Physical/Chronic Health condition Physical/Mobility Impairment Mental or Psychiatric disability Vision-related disability Learning Disabled Cognitive/intellectual Participant did not disclose Learning-Disabled Adult? Yes X No No Disclosure	Veteran Characteristics: Veteran Status:	ics: Employment Status (Check of X) Employed 32 Hours   Employed but received not termination of employments an an person   Not in Labor Force   Not Employed   Long-term Unemployed   (2:27 consecutive weeks)   Reason NOT in labor force (not bisabled   Full time caregiver/paren   Disabled   Disabled			Hours per wed red notice of loyment or M d Yes X eeks)	ek ilitary No	School Status at Program Entry:  In school, Postsecondary school  Not attending school secondary School dropout  Not attending school secondary School grad. or equiv.  Not attending school; within age of compulsory school attendance  Highest School Grade Completed:  Highest Grade completed 9th grade  1st - 12th grades or No school grades  Highest Education Level Completed:  Attained secondary school diploma  Attained a secondary school diploma  Attained a secondary school equivalency  Participant with a disability receives a certificate of attendance/completion as a result of successfully completing an IEP  Completed one or more years of postsecondary education  Attained post-secondary technical or vocational certification (non-degree)  Attained Bachelor's Degree  Attained Bachelor's Degree  Attained Bachelor's Degree  X Mordicational Level Completed  X Completed IN the U.S.				Farm wor  Season  Migran  Dependent Season  By Season  Public Ass  On Public  Yes  Expanded  Yes  Exhaustin	Migrant & Seasonal Farm worker Status: Seasonal Farm worker Public Assistance Information: On Public Assistance? Yes No No No Disclosure Expanded Eligibility for TANF? Yes No No No Disclosure Exhausting TANF within 2 years? Yes No No N/A		
Add'l. Youth Characteristics:  Soster Care Youth			naracteristics	(cont.):	- 1		s and Institutional Funded Prog		ity Corrections			erral Type	: Center Referral	
Add'l. Reportable Characteristics:    Homeless		gle Parent ocated Work of Child(ren) 5 (X) 6 – 10	t Vorker ren) ages: – 10			In Correctional Facility:  Yes  \overline{X}  No Other Institutionalized Setting:  Yes  \overline{X}  No On Probation:  Yes  \overline{X}  No		In Community Corrections:  ☐ Yes ※ No On Parole: ☐ Yes ※ No			00 00	Vne-Stop ( Yes (X) No No Disclos TANF Refe Yes (X) No No Disclos	ure rral	
Ex-Offender Status at Program Entry:  Yes   X No   No Disclosure  One-Stop Program Participation: Received services under Job Corps:  Yes XI No   Unknown				Family  Particip				In Workplace Literacy Program(s):  ☐ Yes X No			Referral fr	om College		



#### **Data Coordinators**

- Envelope with all attachments included (ID, withdrawal, court order)
- Password protected
- Download and store in secure cloud server
- Receives encrypted assessment results by email

#### **PASES Process and Procedures Document**

- Step-by-step instructions for
  - o Participant screening
  - o Creating appointment
  - o Intake
  - o Assessment (CASAS, TABE, & Best Plus Oral)

- Links for
  - Class times/days/content schedule
  - o Free wifi services in every major city of service area
  - o Email templates
- Languages spoken by AEL team
- Detailed PIRL instructions

https://drive.google.com/file/d/1h5We8pYWRBru 7UyGKVA-Mui7No1zav8/view?usp=sharing

#### Remote Intake Rollout

- Internal practice (LOTS)
- Administration started
  - Director support
- Administration independently
- Administration trained hand-picked Intake Specialists
  - IS shadowing
  - Admin support
- Intake Specialists alone
- Intake Specialists trained others
- Training continued

### **DocuSign Setting Changes**

- Changed "sent by" from Ashley Trevino to Grayson College
- Set signing order to be sequential
- Turned off "attached documents to completion" email for PII concerns

#### **Lessons Learned**

- Price
  - o Business Pro
  - o Enterprise per envelope
- Set permission to share information fields to be completed by IS and not participant
- Google doc rather than google calendar
- Difficulty uploading ID, screenshot taken

# **Discussion and Questions**

For additional questions you can contact the team at <a href="mailto:collinael@grayson.edu">collinael@grayson.edu</a>.