



PROCEDURE TRANSMITTAL

SUBJECT: Soft Exit Report

Procedural/Guidance No.:

APPLIES TO: All Career Centers

Effective Date:
12/14/2017

Revised Date:
none

Expiration Date:
Indefinite

REFERENCE:

POLICY

It is the policy of Career Source South Florida to provide a tool to manage the “Soft Exit” process, which is the automatic process in the EF System that exits jobseeker’s who have not received a reportable staff assisted service (services with three asterisks) within the prior 90 consecutive days.

PURPOSE

The Soft Exit Report is intended to assist staff in identifying jobseekers who have not received a reportable staff assisted service within the prior 90 consecutive days. Staff must use this information to determine whether additional staff assisted services need to be provided, and update the EF system accordingly.

PROCEDURE

I. Run the Report

- A. Visit www.careersourcesfl.com and scroll down to the bottom of the webpage and click on the “Links” hyperlink



Employ Miami-Dade



Business Incentive Roundtables



Brickell CityCentre Project



Job Clearing House / Community Workforce



A proud partner of the **AmericanJobCenter** network

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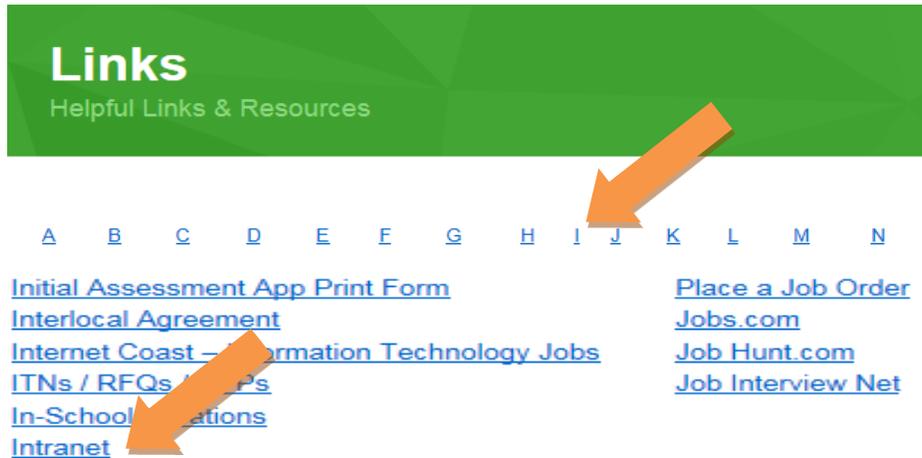
EFM | WFMS | OSST | IAA | LINKS | SITEMAP

Approved By:
Rick Beasley, Executive Director

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- B. On the Links (Helpful Links & Resources) click on the letter “I”. Then click on the Intranet link.

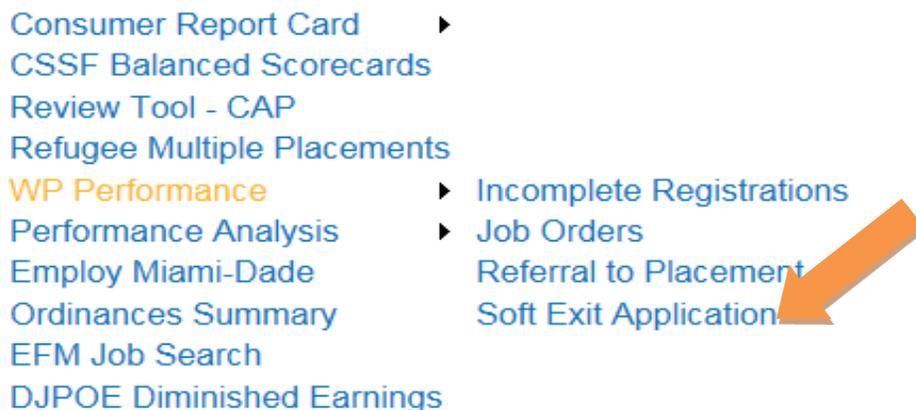


- C. Once the Intranet page loads, look at the right hand side to find a list of “Links” and select the one that reads “CSSF Reports”



When the Reports Page loads, save the link as a favorite by clicking on the star on the top right of your screen as it will used to view several reports on a regular basis

- D. Hover your cursor over the “WP Performance” link and select “Soft Exit Application” link.



E. Log in with your WFMS credentials.

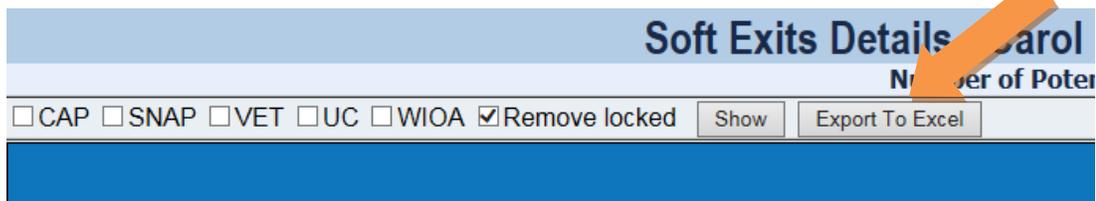


F. The Report for your Center will open up (see Screen Shot below):

1. Click the "Remove Locked" box to conceal Job Seekers with placement already posted.
2. Click "Show", this creates a Soft Exit Report with potential negatives only.
3. To create reports specifically for targeted categories such as VET, WIOA, SNAP, CAP, or UC, click on the desired filter(s) and click "Show".
4. Filter results of "Employed at Participation". Job Seekers Employed at Participation does not affect the WP Entered Employment Rate.

	Days Before Exit Date	# of Days Active in FFM	EFM User Name	First Name	Last Name	Employed at Participation	Program	Phone Number	E-mail Address	Contact Status	Incomplete Registration (YES/NO)	Incomplete Registration Type (Education, Resume, Work History)
Edit	5	92	10415749	IRMA	GONZALEZ JIMENEZ	No		786-320-1349	iglez630923@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	5	108	11050145	Teresa	Perez	No		786-406-3014	terepmendez@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	5	87	WARRENJ6033	JERALD	WARREN	No		999-999-9999			YES	<input checked="" type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	6	136	10219286	Morgan	Hartman	No		202-468-9450	olivia255@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	6	86	10710022	ANDRO	PINEDA	No		786-340-2223	andropineda@live.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	18	155	BRYANT1036	BRITTANEY	BRYANT	Yes		954-667-2384	brittaneybryant01@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	19	164	10917976	Xiomara	Robles	No		786-468-6048			NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	20	91	10896938	MILAGROS	BONILLA RODRIGUEZ	No		786-590-6263	elizetmex@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	20	141	BREZZY	Monta	Howard	No		786-316-8676	howard.montay@yahoo.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	20	72	MARSHALL4766	XAVIER	MARSHALL	No		786-318-8421	paperchaser777.pc@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	21	71	AVILAV9770	VICTOR	AVILA	Yes		786-663-5283	victoravilarealtor@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	21	73	EDUARDOGARCIA48	EDUARDO	GARCIA	Yes		305-780-9318	eagarcia1158@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History
Edit	22	72	11076367	Andrea	Altamiranda	No		305-515-0429	andrea.alt.r@gmail.com		NO	<input type="checkbox"/> Education <input type="checkbox"/> Resume <input type="checkbox"/> Work History

G. Once you have the report you want, Click Export to Excel.



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Rick Beasley, Executive Director

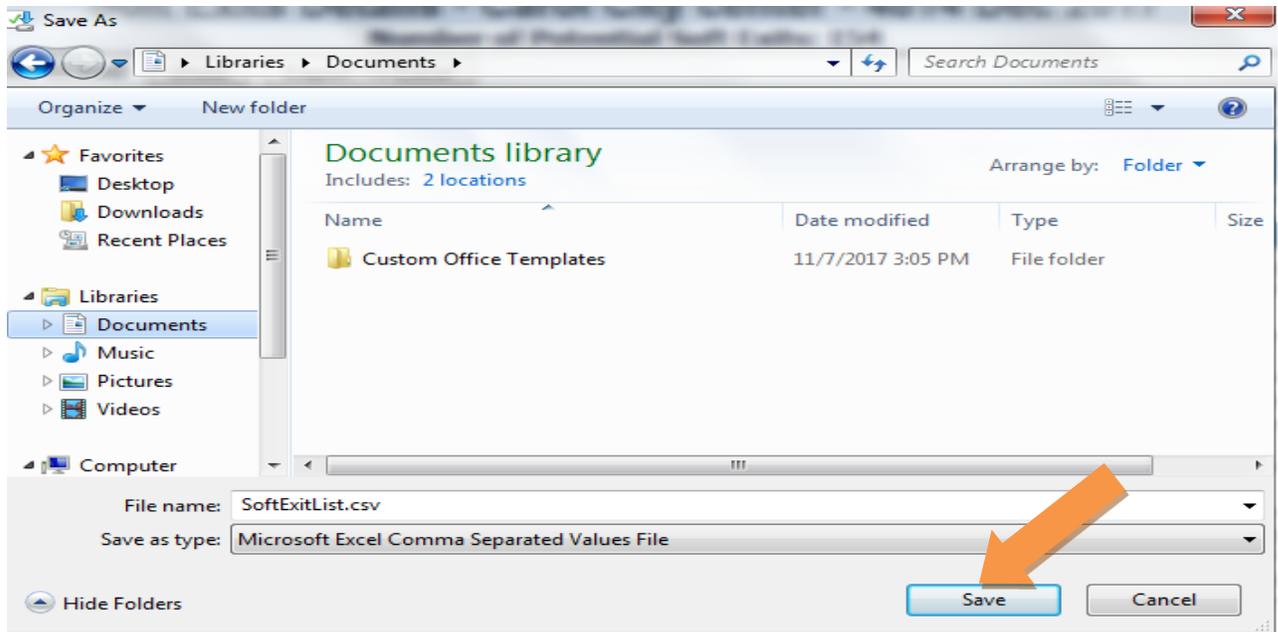
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H. Use the drop-down box and select save as to Excel.



1. Under the Libraries Folder, select Documents, click the save button.
2. If you created reports you must export them and save them to excel separately as you create them.



II. Manage the Report

- A. Run the reports at the end of the month for cases soft exiting the next month ("monthly reports").
- B. Save the monthly report to Excel, add a column to the far right and title it "Comments." As you make contact with each job seeker, record your interaction in the comments section, limiting your record to one or more of the following comments:
 1. Sent e-mail (date of call);
 2. Phone Call (Left a message or Disconnected or Wrong Number or No Answer or Busy);
 3. Employed (supporting documentation to verify employment: received or pending);
 4. Extended with Service (service code provided); or
 5. Allow to Soft Exit.
- C. The "Days before Exit Date" displays the number of days before a jobseeker will exit the report. (See chart below). It must be managed daily and must account for weekends and holidays.
- D. Prioritize by jobseekers that will soft exit first; then work them in the following order of priority: VET, CAP, SNAP, and UC.

- E. The “Days Active in EFM” identifies the total number of days a jobseeker has been a Participant in the EF system. Be ready when you get the job seeker on the phone to question why the job seeker has been receiving Job Seeker Services for a prolong period of time without success, maybe they are not really engaged or interested in Job Search-

Number of Potential Soft Exits: 23

CAP SNAP VET UC Remove locked

	Days Before Exit Date	# of Days Active in EFM	EFM User Name	First Name	Last Name	Employed at Participation	Program	Phone Number	E-mail Address	Contact Status	Incomplete Registration	Incomplete Registration Type			
											(YES/NO)	Education	Resume	Work History	
Edit	5	92	10415749	IRMA	GONZALEZ JIMENEZ	No		786-320-1349	iglez630923@gmail.com		NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	5	108	11050145	Teresa	Perez	No		786-406-3014	terepmendez@gmail.com		NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	5	87	WARREN6033	JERALD	WARREN	No		999-999-9999			YES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	6	136	10219286	Morgan	Hartman	No		202-468-9450	olivia255@gmail.com		NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	6	86	10710022	ANDRO	PINEDA	No		786-340-2223	andropineda@live.com		NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	18	155	BRYANT1036	BRITTANEY	BRYANT	Yes		954-667-2384	brittaneybryant01@gmail.com		NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	19	164	10917976	Xiomara	Robles	No		786-468-6048			NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	20	91	10826938	MILAGROS	BONILLA RODRIGUEZ	No		786-590-6263	elizetmex@gmail.com		NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- F. “Summary” (see screen shot below) provides a snap-shot of the “Follow up Log” with results of the Soft Exit Process. A summary is provided to review the services that were provided.

- G. Extended with Services” is an active link that takes you to the Job Seeker’s information, including the service that extended participation.

Soft Exit Application

Home Summary

Career Center: Carol City center - 4614

December 2017

Data as of: 12/5/2017

Potential Soft Exits	199	Workable Soft Exits	173
WP EER	22.22 %		
EER Numerator	4		
Direct Placements	4		
Obtained Employment	0		
EER Denominator	18		

Follow Up Log

Monthly Follow-Up Conducted: 13

Follow Up Day	Left Message/Sent Email	%	Disconnected/Wrong Number	%	Employed	%	Extended w/ Service	%	Other	%	Obtained Employment	%	Confirmed Soft Exit	%	Scheduled Appointment	%	# Calls
01 Dec	3	43 %	1	14 %	0	0 %	1	14 %	1	14 %	0	0 %	1	14 %	0	0 %	7
04 Dec	1	33 %	0	0 %	0	0 %	0	0 %	0	0 %	1	33 %	1	33 %	0	0 %	3
05 Dec	1	33 %	0	0 %	0	0 %	1	33 %	1	33 %	0	0 %	0	0 %	0	0 %	3
Totals:	5	38 %	1	8 %	0	0 %	2	15 %	2	15 %	1	8 %	2	15 %	0	0 %	13

III. Soft Exit Follow-up Process

The Soft Exit Report is intended to assist staff in identifying jobseekers who have not received a reportable staff assisted service within the prior 90 consecutive days. The report must be managed daily to provide meaningful Reportable Staff Assisted Services that will help a jobseeker to become gainfully employed as follows:

- A. First: Soft exit process should be started, at least 5 days before the expected Exit Date to allow time to call back. Consider weekends, holidays, and staff’s days off to make sure cases do not soft exit during those days un-worked.

Approved By:
Rick Beasley, Executive Director

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[How Filter Criteria](#) (Showing all records)

o Sort, click Column Title

Office	Service Code	Program	Scheduled Date/Time	Actual End Date	Completion Code	Action
CareerSource South Florida - 4862 - Refugee	101 - ***Orientation, Staff Assisted	WP #162139566 (Wagner-Peyser)	11/19/2017	11/19/2017	Successful Completion	View Delete
CareerSource South Florida - 4862 - Refugee	007 - Self Service Resume	WP #162139566		11/14/2017 2:40:00 PM	Successful Completion	View Delete
CareerSource South Florida - 4862 - Refugee	120 - Use Of One-Stop Resource Room / Equipment	WP #162139566 (Registration-Only)	11/14/2017	11/14/2017	Successful Completion	View Delete
CareerSource South Florida - 4862 - Refugee	107 - ***Provision Of Labor Market Research	WP #162139566 (Registration-Only)	11/14/2017	11/14/2017	Successful Completion	View Delete
DEO Help Desk - Email and Phone Contact	881 - Obtained Employment Automated	WP #161500857 (Wagner-Peyser)		6/26/2017 6:03:00 PM	Successful Completion	View Delete
CareerSource South Florida - 4862 - Refugee	880 - Obtained Employment Manual	WP #161500857 (Wagner-Peyser)	5/19/2017	5/19/2017	Successful Completion	View Delete
CareerSource South Florida - 4862 - Refugee	136 - Follow-up Contact	WP #161500857 (Wagner-Peyser)	5/3/2017	5/3/2017	Successful Completion	View Delete
CareerSource South Florida - 4862 - Refugee	114 - ***Staff assisted job search	WP #161500857 (Wagner-Peyser)	5/3/2017	5/3/2017	Successful Completion	View Delete
DEO Help Desk - Email and Phone Contact	881 - Obtained Employment Automated	WP #161500857 (Wagner-Peyser)		3/29/2017	Successful Completion	View Delete

- C. If there are Placements or Obtained Employments in the last 90 days and there are no reportable services (staff services with three asterisks) after a Placement or Obtained Employment was posted, allow the case to exit as positive. Enter code 136 in EF to indicate that it was already part of the soft Exit Process and the jobseeker exit.
- D. If there are only Self- Services after the Placement or Obtained date, enter a code 136 in EF to indicate that it was already part of the Soft Exit Process and let the jobseeker exit as a positive.
- E. If there are only Self-Services for the last 90 days, and you are unable to reach the jobseeker to provide meaningful staff assisted services to start participation, allow the jobseeker to exit. Staff must record at least three verbal contacts, and three e-mail attempts (EF and Excel Spreadsheet) before the allowing the job seeker to exit.
- F. If there are Staff Referrals that have not been resulted in the last 90 days, inquire if the person started working on the job when you get them on the phone. Written verification of employment is needed to enter placements in EF.
- G. Determine if the EF registration is complete. A complete EF Registration includes: General Information, Background—including Work History and Education, and an Active Résumé.

General Information



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1. Log-In information

Confirm the job seeker has filled out the User Name, Password, Security Question and Response.

Login Information

* User Name: Enter Username (3 - 20 characters, and must include characters, letters or numbers. Allowable characters are + @ _ -

* Password: **Very strong!** Enter Password (8 - 16 characters, and must include at least one uppercase letter, one lowercase letter, one number and one special character. Allowable characters are # @ \$ % ^ . ! * _ +).

* Confirm Password:

* Security Question:

* Security Question Response: Special characters are not allowed.

2. Social Security Number

Confirm the job seeker has filled out the social security number. The social security number must be entered twice without dashes.

Social Security Number

* Social Security Number (SSN): Do not enter dashes (for example, 999001111)

* Re-enter Social Security Number:

3. Primary Location Information

The next section requires the residential zip code and asks if the job seeker is authorized to work in the United States. Check to see if the job seeker entered the country, zip code and are they authorized to work in the United States. If the job seeker recently moved to a new area or if they have forgotten their zip code, there is a link next to the zip code field. Click the find zip code link and it takes you to the US Postal Service website where you can look up their zip code.

Primary Location Information

* Country:

* Please enter your zip code: [Find zip code](#)

* Are you authorized to work in the United States? Yes No

4. E-mail Address

Check to see if Job Seekers has entered a Primary E-mail and confirmed the Primary E-Mail address.

E-mail Address

Primary E-mail:

[Read Our E-mail Security Policy](#)

Confirm Primary E-mail Address:

5. Demographic Information – Check to see if the job seeker answered all demographic questions including their date of birth, gender, selective service and have they been arrested/convicted of a crime?

Demographic Information

* Date of Birth: (mm/dd/yyyy)
You indicated your date of birth as September 9, 1989.

Age: 28

* Gender: Female Male I do not wish to answer.

Have you registered with the Selective Service?
[\[Selective Services web site \]](#)

* Have you been arrested / convicted of a crime? Yes No I do not wish to answer.

6. Scan Card Information -The Scan Card Information is not applicable in this region. Click the next button to proceed.

Scan Card Information

Scan Card ID:

Next >>

7. Name – Check to see if the job seeker has entered their first and last name. Click the next button to proceed.

Name

* First Name:

Middle Initial:

* Last Name:

8. **Residential Address** – Check to see if the Job Seeker entered their Residential Address and confirm they still live at that address. Click the next button to proceed.

Residential Address

This is where you live.

* Address Line 1:

Address Line 2:
Apt #, Lot #, Building #, Suite #

* Zip Code: [Find zip code](#)

* City:

* State:

* County / Parish :

* Country:

9. **Mailing Address** – The Job Seeker may have a mailing address that is different from their residential address. If it's different, the job seeker will have to manually enter it here. If it's the same the job seeker will click the checkbox and the information will pre-fill. Check to see if they have filled out their mailing address. Click the next button to proceed.

Mailing Address

This is where you receive your mail.

Address has NOT been standardized.

Use residential address

* Address Line 1:

Address Line 2:
Apt #, Lot #, Building #, Suite #

* Zip Code:

* City:

* State:

* Country:

10. **Phone Numbers** – Check to see if the job seeker enters their Primary Phone number and Primary Phone Type. The phone number type might be a cell phone, residential phone or a relative's phone. Click the next button to proceed.

* Indicates required fields.

For help click the question mark icon next to each section.

Phone Numbers

* Primary Phone: - - Ext:

* Primary Phone Type:

11. **Preferred Notification Method** - This section displays the job seekers Preferred Notification Method preference setting. Check to see if the job seeker has chosen a primary notification method from the drop down box.

* Indicates required fields.

For help click the question mark icon next to each section.

Preferred Notification Method 

* Please select a method in which you prefer to receive your notifications:

None Selected
Internal Message
Email
Text Message (If Available)
Text Message Notification (If Available)
Internal Message with Email Notification

12. **Site Access** - In the site access section check to see where the job seeker plans on accessing the system and how they heard about the website (our system).

Site Access

* From where are you accessing this website?

How did you hear about this website?

13. **Citizenship & Disability** - In this section check to see if job seeker selected their citizenship status from the drop-down menu. Next is a section displaying information about their disability status click the help icon if you need more information about the definition of disability. If the Job Seeker is a U.S. Permanent Resident - At the Citizenship field for Asylees & Refugees in addition to entering the Alien Card Number the Job Seeker must enter an expiration date. For those with “Indefinitely Status”, use expiration date 12/31/2069 (or whatever is the furthest date available in EF) this was suggested by the DEO.

Citizenship

* Citizenship

None Selected
 Citizen of U.S. or U.S. Territory
 U.S. Permanent Resident
 Alien/Refugee Lawfully Admitted to U.S.
 None of the above

Disability

* Do you have a disability?

Yes, I have a disability.
 No, I do not have a disability.
 I do not wish to answer.

Providing this information is optional and refusal to provide disability information will not subject you to any adverse treatment. Information regarding your disability status will be kept confidential as provided by law and will be used only in accordance with the law. Please note that for some programs, the information is needed to determine eligibility. Note too that you may be eligible for additional support services and programs if you have a disability.

<< Back Next >>

14. **Education**-Check to see if the job seeker has selected the highest education level achieved.

* Indicates required fields. For help click the question mark icon

Education Information

* Your Highest Education Level Achieved:

None Selected
 No School Grades Completed
 1st Grade Completed
 2nd Grade Completed
 3rd Grade Completed
 4th Grade Completed
 5th Grade Completed
 6th Grade Completed

* Indicates required fields. For help click the question mark icon.

Education Information

* Your Highest Education Level Achieved:

Associate's Degree
If you have a High School Diploma or High School Equivalency Diploma, please select the appropriate value of High School Diploma or High School Equivalency Diploma.

* Are you attending school?

None Selected
 Yes, Attending High School, Junior High, Middle, or Elementary School
 Yes, Attending An Alternative High School
 Yes, Attending College or a Technical or Vocational School
 No, Not Attending Any School

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15. **Employment Information** - This section asks for employment information. Check to see if the job seeker entered their current employment status, type of business they worked in, if they're receiving unemployment insurance, if they're currently looking for work, do they have any related licenses or certifications, has the job seeker recently relocated due to a recent major disaster and if they've received a notice of military termination or separation.

Employment Information

* Current Employment Status:

* Type of business worked in:

* Unemployment Eligibility Status?

* UI Referred by Status:

* Claimant has been exempted from work search Yes No

* Are you currently looking for work? Yes No

Do you have any related licenses or certifications? Yes No

Have you recently relocated due to a recent major disaster (e.g. hurricane)?

* Within the last 12 months, have you received a notice of termination or layoff from your job or received documentation that you are separating from military service?

Yes. I have recently received a notice of termination or military separation.

No. I have not recently received a notice of termination or military separation.

16. **Farm Worker Information** - Next is the Farm Worker Information - have they worked on a farm 12 months if they answer yes additional questions will appear regarding their farm work status. Fill out the necessary information and click the next button to proceed.

Farm Worker Information

The following questions do not pertain to work performed on a family farm, ranch, beekeeping, food processing or food manufacturing operation owned by yourself or close relatives.

* Have you worked as a farmworker in the last 12 months? Yes No

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Next >>

17. **Job Title** -If the job seeker is currently looking for work check to see if they have entered their desired job title. The System will autocomplete the occupation title and code based on the selected job title. If you do not see the correct occupation listed click the search for an occupation link to perform a detailed occupation search then click the next button.

* Indicates required fields.

 For help click the question mark icon.

Job Title

Please enter a job title below. As you are entering the job title, you may see a list of common job titles similar to what you are entering. If you see your job title in the list, select it.

* What is your desired job title?:

Cook

Cook

Cook (Dinner)

Cook (Elementary School)

Cook and Waitress/Waiter

Cook Apprentice

Cook at School

Cook Box Filler

can be changed at any time after registration.

Job Occupation

Please select the occupation that best describes your occupation. You may either select from the Suggested Occupations dropdown list, which is populated based on the job title entered, or you can search for an occupation using the search link.

None Selected

[[Search for an occupation](#)]

* Occupation Title:

* Occupation Code:

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Next >>

18. **Ethnic Origin** –Check to see if the Job Seeker entered information about their ethnic origin. Radio buttons allow only one choice while checkboxes allow multiple answers. Then click the next button to proceed to the next section.

Ethnic Origin

Are you of Haitian heritage? Yes No I do not wish to answer.

* Are you of Hispanic or Latino heritage? Yes No I do not wish to answer.

* Race - Please check all that apply:

- African American/Black
- American Indian/Alaskan Native
- Asian
- Hawaiian/Other Pacific Islander
- White
- I do not wish to answer.

<< Back
Next >>

19. **Military Service** -This section asks about their military status if they answered the first three questions by selecting the “no” radio buttons then click the finish button to proceed. However if the job seeker selects yes to the first three questions, the screen will expand with a number of questions concerning their military status. Check to make sure all items have been completed.

Military Service

Veterans and their spouses may be entitled to State and Federal Benefits. Please answer the following questions.

- * Are you a caregiver who is a spouse or family member to a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit? Yes No

20. **Public Assistance** - The next section is the Public Assistance Section. The Job Seeker needs to provide answers to the following questions if any apply within the last 6 months. Then click the finish button.

Public Assistance

Please provide answers to the following questions if any apply within the last 6 months.

- * Has your household received Temporary Assistance for Needy Families (TANF) payments? Yes No

Congratulations you have checked the general information section for accuracy and completion. **It's important to remember the job seeker must complete the Background Information and the Résumé to make it a complete registration.**

Background Information

Once you finished the General Information go to the Background (Go to My Individual Profile Folder, under the Personal Profile Information, click Background). **There are 18 steps in the background** - Focus on the following categories: Education & Training, Occupational Licenses & Certificates, Employment History and Résumé Items.



1. The First Step of the Background is Education and Training. Check to see if the Job Seeker has completed Qualification Level, Course of Study, Issuing Institution, Are they Currently Attending this School?

Education and Training

Do not complete for education levels of less than High School or High School Equivalency Diploma.

*Qualification Level: None Selected

*Course of Study: High School Equivalency Diploma

Educational Program Classification: High School Diploma

1 Year of College or a Technical or Vocational School

2 Years of College or a Technical or Vocational School

3 Years of College or a Technical or Vocational School

Certificate of Attendance/Completion (Diploma Equivalent)

2. This is step 18 for the Background. Click save to complete the Background.



Enter your information below. When you are finished click the Save button. To cancel your changes, click the Cancel button.

Typing Speed

Typing Speed

None Selected

Less than 20 wpm

20 + wpm

40 + wpm

60 + wpm

80 + wpm

Save

Cancel

Résumé

Once you finished the Background (Go to My Individual Profile Plans, under the Employment Plan Profile, click Résumés). Make any necessary updates to their Résumé.

My Individual Profiles

- [-] Personal Profile
 - [+] General Information
 - [+] Background
 - [+] Activities
 - [+] Memo
 - [+] Documents
- [+] Search History Profile
- [+] Self Assessment Profile
- [+] Communications Profile

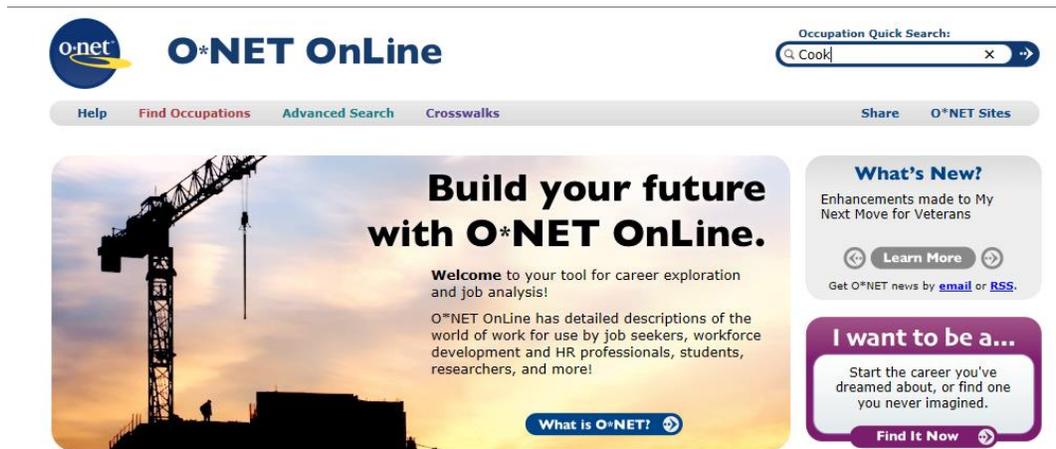
My Individual Plans

- [-] Employment Plan Profile
 - [+] **Résumés**
 - [+] Job Applications
 - [+] Online Application
 - [+] Virtual Recruiter
 - [+] Employment Goals
- [+] Training Plan Profile
- [+] Benefits Plan Profile
- [+] Financial Plan Profile

Review current Résumé – remember that Résumés expire automatically every 180 days and must be re-activated/updated. (See Screen Shot below).

Résumés must be up-dated and on-line, if reactivating Résumés, make sure to correct them.

1. The First Step: Go to www.onetonline.com. To help enhance the job seeker's Résumé do a quick search using the Title of the position held by the Job Seeker. In this example we are looking for a Cook Job Description. Type Cook in the Occupation Quick Search and push enter on the Key Board.



2. Now that you have conducted the quick search a list of Cook occupations will show on the webpage. The Job Seeker was a Cook in a Cafeteria in his previous job. Click on the Cooks, Institution and Cafeteria.

Quick Search for: Cook

Showing top 20 occupations for Cook. Closest matches are shown first.

How do they match?	Code	Occupation
	35-2011.00	Cooks, Fast Food
	35-2014.00	Cooks, Restaurant 
	35-2012.00	Cooks, Institution and Cafeteria
	35-2015.00	Cooks, Short Order 
	51-3093.00	Food Cooking Machine Operators and Tenders
	35-1011.00	Chefs and Head Cooks 

3. Once you have clicked the link you will see a Summary Report for Cooks, Institution and Cafeteria. Confirm which Tasks the Job Seeker has performed and add those tasks to their Résumé.

Tasks

All 15 displayed

- ⊕ Clean, cut, and cook meat, fish, or poultry.
- ⊕ Cook foodstuffs according to menus, special dietary or nutritional restrictions, or numbers of portions to be served.
- ⊕ Clean and inspect galley equipment, kitchen appliances, and work areas to ensure cleanliness and functional operation.
- ⊕ Apportion and serve food to facility residents, employees, or patrons.
- ⊕ Direct activities of one or more workers who assist in preparing and serving meals.
- ⊕ Wash pots, pans, dishes, utensils, or other cooking equipment.
- ⊕ Compile and maintain records of food use and expenditures.
- ⊕ Take inventory of supplies and equipment.
- ⊕ Bake breads, rolls, or other pastries.
- ⊕ Train new employees.
- ⊕ Monitor use of government food commodities to ensure that proper procedures are followed.
- ⊕ Monitor menus and spending to ensure that meals are prepared economically.
- ⊕ Determine meal prices, based on calculations of ingredient prices.
- ⊕ Plan menus that are varied, nutritionally balanced, and appetizing, taking advantage of foods in season and local availability.
- ⊕ Requisition food supplies, kitchen equipment, and appliances, based on estimates of future needs.

- A. Compare the Résumé to the O'Net Occupational Codes
- B. Up-date the Résumé and make corrections to be ready for a Quality Referral.
- C. Make sure the Résumé has all of the Job Seeker's skills.
- D. Make sure the email address is professional; if not, when you contact the jobseeker work with them to create a professional email or use one they already have that is professional.
- E. Conduct a job search in EF to identify potential job referrals to offer the job seeker when you get them on the phone or e-mail.
- F. Develop a communication plan prior to the initial contact with the jobseeker; by reviewing the jobseeker's registration in the EF system.
- G. If the jobseeker is recipients of SNAP or CAP determine if the jobseeker will benefit from dual enrollment in WIOA.
- H. Prior to calling the jobseeker, review the DCF FLORIDA System to collect eligibility documents for the dual enrollment into WIOA (WIOA Eligibility Documentation Checklist).
- I. Some additional documents that are not found in the FLORIDA System may be needed to complete the WIOA Eligibility such as:
 - 1) Social Security Number, which can be obtained from SUNTAX (employer record) if they had previous employment
 - 2) Proof of Highest Grade Completion, *which* can be obtained through a school record such as a high school diploma or equivalent, or transcript. The Applicant Statement may be used if these documents cannot be obtained.

J. Provide information to jobseekers in the Hard to Serve Categories; regarding the WIOA eligibility process when you get them on the phone, and schedule an appointment for the jobseeker to bring in the appropriate documents.

To Reactivate Résumés:

General Information
Background
Activities
Memo
Documents
Search History Profile
Jobs
Employers
Programs
Occupations
Industries
Areas
Self-Assessment Profile
Job Skills
Personal Skills
Workplace Skills
Work Interests
Work Values
Tools and Technology
Multiple
Communications Profile

Résumés
Job Applications
Online Application
Virtual Recruiter
Employment Goals
Training Plan Profile
Classroom Training
Online Training
Benefits Plan Profile
Workforce Innovation and Opportunity Act (WIOA)
Trade Adjustment Assistance (TAA)
Other Benefits
Financial Plan Profile
Financial Literacy
Overall Budget
Training Budget
Transition Budget

Summary
Case Notes
Activities
Documents (Staff)
Case Management Profile
Case Summary
Programs
Plan
Assessments
Report Profile
Tracking
Statistics
Combined Assessment
Labor Exchange

Applications	Online Application	Virtual Recruiter
<p>ally completed or deleted résumés or all résumés regardless of their status:</p> <p>View active résumés</p> <p>not displayed to employers. Click the Reactivate All Expired Résumés link to update all your résumés to today's date.</p> <p>0 Records Found</p> <p>[Tips on preparing your résumé Reactivate All Expired Résumés Cover Letter]</p> <p>Create new Résumé</p>		

Verbal interactions with the Job Seeker via telephone:

A. **If unable to reach Job Seeker, please leave the following message:**

- 1) “This is Career Source South Florida at ____ (location of your Center), you visited us/or used EF on ____” (use the last service/activity date on EF). “We are calling to find out if you were satisfied with the services” - “And to see if we can do something to assist you” – mention if you found a potential Job Order where you could refer this individual.
- 2) Invite them to call you back for excellent services and to see if they are interested in the vacancy.
- 3) Follow up must continue on different dates for a minimum of 3 calls and 3 emails. If all fails, enter code 136 in EF, enter case notes, and let the case exit negative.

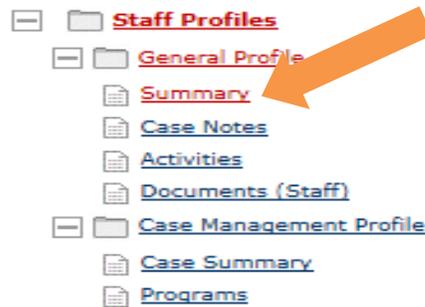
B. If able to reach the Job Seeker and they are interested in continuing services,

- 1) “This is Career Source South Florida at _____ (location of your Center), you visited us/or used EF on _____” (use the last service/activity date on EF). “We are calling to find out if you were satisfied with the services” - “And to see if we can do something to assist you” – mention if you found a potential Job Order where you could refer this individual.
- 2) If you find out that the Job Seeker started working:
 - a. If the Job Seeker found the job on their own, but there is a staff service provided in the prior 90 days, get necessary information to enter an “Obtain Employment” credit. Remember OE’s need verification of employment and Case Note. Include that information in the Excel Spreadsheet under Comments.
- 3) Staff must provide and enter at least one reportable service (Services with 3 asterisks) that leads to a potential referral and extends participation, if Job Seeker is interested in Job Search/Referrals.
- 4) Example of services that can be provided over the phone and engage/re-engage participation: Labor Market Information. 107*** . Requires a Case Note with specific details. Résumé Assistance 115***.
- 5) Critiquing their Résumé, offering suggestions, tips, etc. on Résumé writing over the phone is okay; however, there must be evidence that an EF Résumé was worked on. For example a case in which the Résumé remained expired, or there is no résumé, or the résumé is not high quality is not acceptable, and shows evidence that Résumé Assistance was not provided.
- 6) Staff will inform the Job Seeker of the vacancies found earlier to see if the Job Seeker is interested in applying for the job, or conducts the Job Search while talking to the Job Seeker after collecting the necessary information to complete the Registration and Résumé.
- 7) If able to do a Referral, it must be a Quality Referral (80% match or better) to that job order. Note: Not all Job Searches produce Referrals.

Conduct EF Job Search: Only Quality Referrals will be done (80% or better match). A detailed case note is required to explain a referral of a jobseeker that does not have the 80% skills match, or does not meet at least one of the qualifications on the job order.

A. How To Make A Quality Referral

- 1) Go to My Staff Profiles Folder, under the Case Summary Folder, click the Case Summary



- 2) Check to see if the Job Seeker has received a referral

A distinct referral to the **region** is defined as: a job seeker registered in Employ Florida that has not received a job referral by a career center. This will be the first time a job seeker receives job referral.

A distinct referral to the **career center** is defined as: a job seeker registered in Employ Florida that may have had a job referral from a different career center however, this is the first staff issued job referral from this Center.

In the example below: You checked the Case Summary and discover the Job Seeker has not received an Internal Job Referral. This job seeker is distinct to the region and career center.

Case Summary Panel

Activity Summary[[Hide/Show](#)]

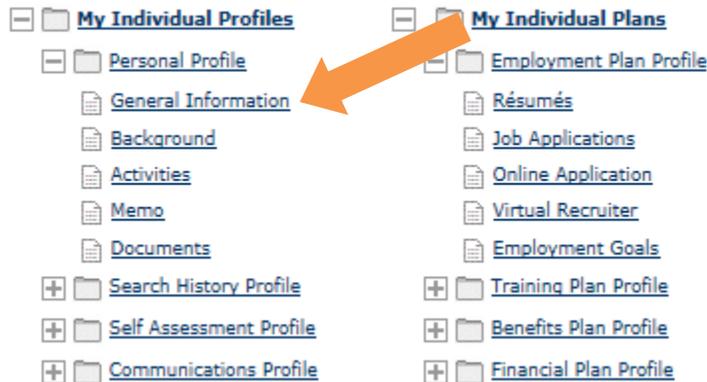
Item
0 Case Note(s)
1 Service Record(s)
0 Internal Job Referral(s)
0 Staff Referral(s) to Provider(s)
1 Résumé(s) (2 view(s)) 1 Résumé(s) available to employers 0 Résumé(s) offline
0 Letter(s)

The image shows a Case Summary Panel with an activity summary table. An orange arrow points to the '0 Internal Job Referral(s)' link.

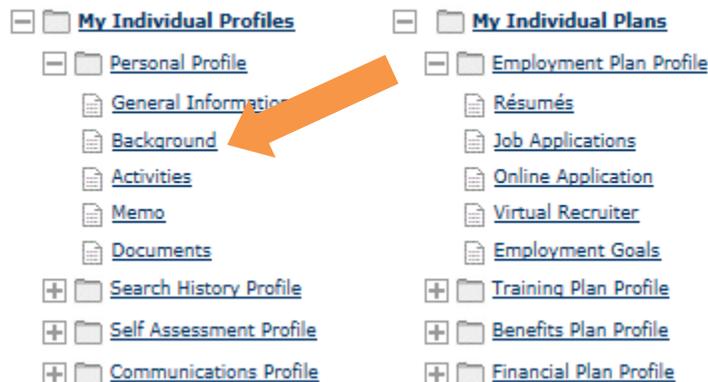
B. Complete Registration. The EF Registrations must be Complete before any Referrals are issued. Review the Job Seekers EF registration

- 1) Go to My Individual Profile Folder, under the Personal Profile Information, click General Information

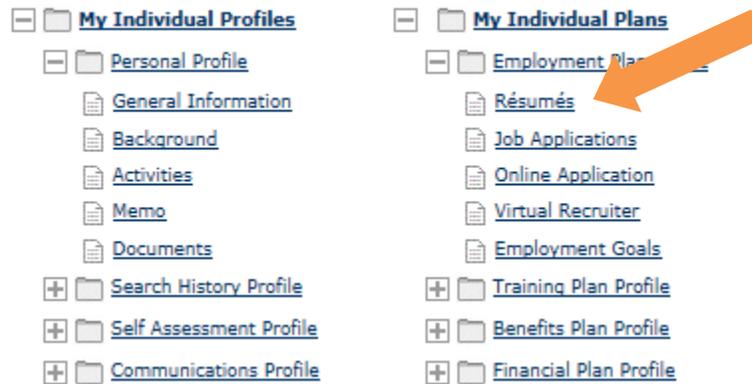
- 2) Check to see if all fields with a red asterisk are completed (the sections are Login Information, Email Address, Name, Residential Address, Mailing Address, Phone Numbers, Preferred Notification, Site Access, Demographic Information, Citizenship, Disability, Education Information, Employment Information, Farmworker Information, Job Title, Job Occupation, Ethnic Origin and Military Service)



- 3) Once you finished the General Information go to the Background (Go to My Individual Profile Folder, under the Personal Profile Information, click Background). Focus on the following categories: Education & Training, Occupational Licenses & Certificates, Employment History and Résumé Items.



- Once you finished the Background (Go to My Individual Profile Plans, under the Employment Plan Profile, click Résumés). Make sure the Résumé is active and online. Make any necessary updates to the Résumé.



- Select the check box and click the job search link

Résumé Status	Online Status	Number of Requests	Last Reviewed by	Review date	Online Until	Action	Select
Active	Online	10			5/27/2018	Job Search Copy Edit History	<input checked="" type="checkbox"/>

- Click on the search button

Search for jobs using your résumé

Click the Search button in this section after you have selected a résumé below.

Area (click to change): [Broward County and Miami-Dade County](#) Retail sales

Sources: Check All | Uncheck All

<input checked="" type="checkbox"/> Preferred Employer	<input checked="" type="checkbox"/> Private Job Board
<input checked="" type="checkbox"/> Corporate	<input checked="" type="checkbox"/> Recruiter
<input checked="" type="checkbox"/> Education Institution	<input checked="" type="checkbox"/> Social Media
<input checked="" type="checkbox"/> Government	<input checked="" type="checkbox"/> State Job Board
<input checked="" type="checkbox"/> Hospitals	<input checked="" type="checkbox"/> Volunteer
<input type="checkbox"/> National Labor Exchange	
<input checked="" type="checkbox"/> Newspaper	

Search Item	Value
Desired Occupation	Retail Salespersons
Desired Salary	\$12.00 hourly (\$25,000 annually) or more
Education Level	High School Diploma or Equivalent

Include jobs with no salary listed
 Include jobs with no education listed

[Change Job Search Criteria](#)

Search

- 7) Once a jobseeker has been determined to have met the required 80% skill match, click the Select Check Box and scroll to the bottom of the webpage and click the refer link.

Requirements Matched						
Location	Job Skills	General	Specialized	Salary	Source	Select
Miami, FL	100%	100%	No	\$12.03 per hour	★	<input type="checkbox"/>
Miami, FL	100%	100%	N/A	\$12.50 per hour (minimum)	★	<input checked="" type="checkbox"/>

[Refer](#)
[Map](#)

C. Inform the Employer. Inform employer of the candidate you just referred, either directly with the employer (if appropriate) or through the staff person who has the relationship with the employer.

D. Follow-up with Employer and Job Seeker is key. Follow up within two weeks from referral.

V. Up-date Soft Exit Application:

A. Once the follow-up is done, the information must be used to up-date the Soft Exit Report by using the “Edit” button on the Soft Exit Application.

	Days Before Exit Date	# of Days Active in EFM	EFM User Name	First Name				Incomplete Registration	Incomplete Registration Type						
Edit	1	91	10865781	Naomy											
Edit	2	181	10989019	Ruby											
Edit	2	270	10913758	Rames											
Edit	2	361	10514626	Joel											
Edit	2	95	11063925	Alexandra											
Edit	2	95	10297451	Aldys											
Edit	2	94	BELLOA3284	ARLETY											
Edit	2	90	11066540	Matteo	Orlita	No		914-334-3122							
Edit	2	90	9307330	RAVELO	RAVELO	No		305-244-3518							
Edit	2	90	RODRIGUEZC7834	CARLOS	RODRIGUEZ	No		786-870-3666							
Edit	3	181	10989062	Manuel	Amieva	No	UC	786-879-2543							
Edit	3	928	10357894	THOMAS	BERRYMAN	No	V	931-801-7053							

B. Click the radius button corresponding to the result of the follow-up and click the “Update” button.

Edit Job Seeker
 Username: 10741487
 WP Application: 161897732

Left Message/Sent e-mail
 Disconnected / Wrong Number:
 Employed:
 Extended with a Service:
 Other No Answer
 Obtained Employment:
 Confirmed to Soft Exit:
 Scheduled Appointment:

Approved By:
Rick Beasley, Executive Director

Update to

Issued by: Adult Programs

C. Use the Excel Spread Sheet to discuss the progress made, issues, pending's cases, etc. with the Center Manager or designee on weekly bases.

VI. Information this Report Provides

- A. Generates a list of cases due to Soft Exit in the EF System within the next 90 days, by Provider, and identifies (as an active link) how many cases will potentially Soft Exit during each of the next 3 months.
- B. Shows the number of days before cases exit from the date the report was pulled.
- C. Shows the number of days a Job Seeker has been active in EF receiving Job Seeker Services.
- D. Shows cases with placements. (Without active link on the "EFM User Name" column).These are Positive Exits.
- E. Shows if the Jobseeker was employed at Participation.
- F. Shows Jobseeker's with Incomplete Registration.
- G. Shows Jobseeker's phone number and e-mail address.
- H. Shows Follow up Log.

VII. Benefits of using the Report

- A. Allows for improved outreach and customer services
- B. Allows staff to identify job seekers who are a potential negative exit before the soft exit.
- C. Allows staff to follow-up with Job Seekers to find out whether they need/want additional services.
- D. Increases the opportunity to capture Obtained Employment Credits (Job seeker who became employed within 90 days of receiving Reportable Staff assisted Services).
- E. Increases the opportunity for a distinct referral
- F. Identifies jobseekers who were employed at participation (these job seekers do not affect the WP Entered Employment rate).
- G. Capability of filtering by Categories. (Hard to Serve)

VIII. Explanation of Report Fields

- A. The "Edit Field" allows documenting the result of follow-up in each case.
- B. The "Days before Exit Date" shows the number of days before cases exit from the date the report was pulled in.
- C. The "Days Active in EF" shows the number of days a Job Seeker has been active in EF receiving Job Seeker Services.
- D. The "EF User Name" shows cases with Placements. (Cases without an active link). These are Positive Soft Exits. These cases do not be to be worked nor any services entered.
- E. The "Employed at Participation shows if the Job Seeker was employed at Participation. Job Seekers who are employed at participation do not affect the WP Entered Employment rate. These cases do not need to be worked nor services entered.

IX. Performance Expectations

A. Complete Registration

- 100% of Participants extended with Staff Services.

B. Skills Match:

- In general, 80% or better.

C. Referrals to Placement Ratio:

- 30% Referral to Placement Ratio. Preferred number of referrals per Job Order (4 to 5)

D. Job Order fill rate:

- 65% Job Order fill rate.

X. Glossary of Terms

- A. **Active Résumé:** A Résumé posted in EF that is less than 180 days. Résumés in EF automatically become inactive in 180 days; however they can re-activate it by using the “Reactivate All Résumés” link.
- B. **CAP (Career Assistance Program):** Services for TANF recipients.
- C. **Complete Registration:** A Wagner Peyser participant who has a Full Registration. A full registration includes General Information; Background Information (including Education and Work History; and an active Résumé).
- D. **Hard to Serve Categories:** CAP, SNAP, UC program participants; plus Veterans and Homeless.
- E. **Job Seeker:** An individual who is registered in EF.
- F. **Negative Exit:** A Wagner Peyser or WIOA participant, who has not received a Reportable Staff Assisted Services (services with three asterisks) within the 90 days, exits the system as a negative.
- G. **O’Net:** The Occupational Information Network (O’Net) www.onetonline.org is a free on-line data base containing occupational definitions as well as skills and abilities required to perform those occupations.
- H. **Obtained Employment:** a WP Participant who secures employment within 90 days of receiving Reportable Staff Assisted Services.
- I. **Participant:** A Job seeker who is registered in EF and received a Reportable Staff Assisted services with 3 asterisks.
- J. **Placement:** A Job Seeker referred by Staff to a Job Order from a Preferred Employer. A Job Placement counts only once per WP application ID in EF and Distinct Social Security Number for a Program Year, unless a second placement comes about during that period that is a WIOA Placement.
- K. **Positive Exit:** A Wagner Peyser or WIOA participant referred by staff to a vacancy posted in an EF job order, who was hired into that vacancy and received no additional Staff Assisted services, exits the system as a positive (a Placement)
- L. **Preferred Employer:** Those employers with whom we made prior arrangements to post Job Order in EF and to refer potential candidates.
- M. **Reportable Staff Assisted Services:** Staff Assisted Services marked with 3 asterisks.

- N. SNAP (Supplemental Nutrition Assistance Program):** Provides food for low income individuals or families.
- O. SNAP E&T:** Training and Employment program for SNAP Recipients.
- P. Soft Exit:** The automatic EF process that exits a Wagner Peyser or WIOA Participant who have not received a Reportable Staff Assisted Service (services with three asterisks) within the 90 consecutive days.
- Q. TANF (Temporary Assistance for Needy Families):** Cash benefits for Needy Families.
- R. UC (Unemployment Compensation Benefits):** Monetary assistance program for Laid Off workers.
- S. WIOA (Workforce Innovation and Opportunity Act):** A program offering employment and training services.
- T. WP (Wagner Peyser):** Job Seeker Services Program.

XI. Services Coding

- 000 – System generated self-service or staff-generated
- 100 – Basic
- 200 – Individualized
- 300 – Training
- 400 – Youth
- 500 – Referral Information (System generated)
- 600 – System generated status changes (i.e., Change Claimant To Non-Claimant)
- 700/800 – Placement Information
- E – Employer Services

Services with the asterisk marks * will initiate or extend participation.**

100 Validate I-9

- Does not commence or extend participation but is necessary for performance of duties. (Not a reportable service)
- Allows staff to see if an I-9 has been validated for an individual and is on file in a one-stop center. (Not in order on “add services”).
- INS form 516 must be issue also.

101 *Orientation**

- A structured, on-site session designed to acquaint customers with the one-stop and other available services and programs that can assist participants to secure employment. The length of this session may vary and should be provided by, or in conjunction with, One-Stop Center staff. Orientations that include filmed or electronic presentations of the One-Stop Center’s services are acceptable but must be documented as such on the services screen.

102 *Initial Assessment**

- Job seekers receive an initial analysis of the strengths and weaknesses of their educational level, work history, and vocational skills; identification of employment barriers; and development of a plan (not necessarily a written employability plan) to utilize their strengths and reduce weaknesses.
- Assessment Interview Documentation: When this service is provided by one-stop staff, documentation consisting of specific assessment points (i.e., strengths/weaknesses) should be recorded in the “Notes” screen at the time of service entry.

103 *Information on Training Providers, Performance Outcomes**

- The provision of specific training related information that enables a customer to make informed choices relative to training opportunities and resources.
- Automatic system documentation.

104 *Job Search Workshop**

- A short seminar designed to provide participants with knowledge that will enable them to find jobs.
- Subjects are not limited to, but must include, labor market information,
- application/résumé writing, interviewing techniques and how to find job openings.
- Segments may be given at different times and this service can be taken once all mandatory components are completed.

105 *Job Finding Club**

- Encompasses all elements of the Job Search Workshop
- Encompasses a period of at least 1-2 weeks of structured, supervised individual and/or group support where participants attempt to obtain jobs

106 *Provided Internet Job Search Support/Training**

- Worked with a job seeker to train on using the internet for job search
 - Using a mouse
 - Using a search engine
 - Using EFM, etc.

107 *Provision of Labor Market Research**

- Providing a job seeker with information pertaining to the socio-economic forces influencing the employment process in the local labor market area.
- Includes information related to:
 - Occupational staffing patterns,
 - Hiring patterns,
 - Working conditions, and
 - Pay of firms or industries.
- Helps the job seeker plan and carry out a successful job search.
- Labor market information may be provided to job seekers in person or via the telephone and may be provided as often as necessary.
- Duplication of a specific LMI service should be avoided.

- **CASE NOTES MUST** be entered as to which kind of LMI was given: When this service is provided by one-stop staff, documentation should be recorded on the “Notes” screen at the time of service entry.
- Documentation should include the influencing force of the employment process, i.e., “Provided information on staffing patterns on ABC Corp.,” or “provided trade dispute information regarding XYZ Corp.”

109 *Case Coordinated Services**

- Veteran Program staff use this service to take credit for coordination with community agencies and other federal, state, and local governments who provide services.

111 TAP Workshop

- Not a reportable service
- Transition Assistance Program Workshop for Vets getting ready to leave the military

112 ***Job Fair

- A structured gathering and exhibition in an appointed place with individuals who are seeking employment with employers who are seeking workers.
- This assistance can be provided at the employer's business location, the one-stop center, or another designated location with prior arrangements made by or in conjunction with one-stop center staff.
- Logs or applications taken at a job fair should be retained for one year after the Program Year of the Job Fair.
- Referral to a job fair is not sufficient to obtain credit for this service.

113 ***Job Search Plan

- A plan that focuses on how to look for a job and may contain:
 - What do you want to do?
 - Where do you want to work?
 - What skills do you have that an employer would want?
 - How do you create a Résumé?
 - Where can you find out about open jobs?
 - Who can help you find a job?
- EXAMPLE: <http://www.education.umn.edu/ETCS/career/advanced/JobSearch.pdf>

114 ***Staff Assisted Job Search

- Staff can select this service when they have provided job search services to a job seeker either through EFM or any other job search mechanism.

115 ***Résumé Preparation Assistance

- A session with a job seeker that instructs him/her how to write a résumé and/or the one-stop staff will critique a written résumé.
- Providing a job seeker with a brochure on how to write a résumé is not sufficient to credit this as a service.

116 ***Received Service from Staff Not Classified

- Staff time is expended providing a service which is not listed in EFM
- **Case Note:** The service must be documented on the notes screen with the action and the result of the action.

117 Outreach Vet/MSFW

- Outreach performed on individual job seeker.
- Does not commence or extend participation but is necessary for performance of duties.

118 - Failed To Respond To Call-In

- Not a reportable service
- Can be used to note job seeker's failure to respond to an e-mail regarding a referral.

120 - Use of One-Stop Resource Room / Equipment

- Not a reportable service
- The job seeker comes into the resource room and makes copies of a résumé or uses telephone/fax machine.
- Use code 120 to record the service

123 *Job Development Contacts**

- A job development is the process of securing a job interview with a public or private employer for a specific job seeker for whom the one-stop center has no suitable opening in EFM. If there is no suitable opening on file in the center, staff should make job development contacts on behalf of the customer.
- **Case note:** A case note with the name of employer, name of contact person, interview dates, and potential position must be entered on the job seeker side.

124 *Received Bonding Assistance**

- The bonding program provides federal fidelity bonds to job seekers for whom commercial bonds cannot be obtained, such as offenders.
- Each local one-stop center should have an associate designated as the local bonding coordinator who is trained in procedures for providing bond coverage.
- Service can only be taken by the person writing the bond.
- Use when bond certificate actually issued, not just letter of intent

125 *Job Search/Placement Asst., including Career Counseling**

- May be used to identify Priority Re-employment Program Placement Services.

126 *Tax Credit Certification**

- The job seeker has been provided information regarding the Work Opportunity Tax Credit Program (WOTC).
- This service may be claimed for providing informational services regarding the program.
- **Case note:** Documentation of providing Tax Credit information must be documented on the “Notes” screen by providing the qualifying WOTC Tax Credit eligibility criteria.

128 *Assigned Case Manager - Vets Only**

- This is a service for veterans only.
- The name of the Veteran’s Representative should be identified in case notes.

129 *Assigned Case Manager and/or received Case Management Services**

- This is a service for veterans only.
- The type of case management services provided must be documented on the “Notes” screen. If a case manager is assigned, the name of the veteran’s representative should also be included.

130 *Proficiency Testing**

- This service can be taken if the one-stop center provides any type of proficiency testing such as keyboarding, computer skills, etc.
- Any testing an employer requires the one-stop center to provide.
- May be a specific aptitude test, personality test, interest, etc.
- Test type and any pertinent information should be listed on the “Notes” screen.

131 *Testing – Other**

- Must document test name, type of test, and result on the “Notes” screen.
- Testing must be done by one-stop center staff.

134 - *Employer Pre-Screening**

- Staff can take this service when screening for qualifications on a suppressed order does not result in a referral.

135 - Local Office Contact

- Not a reportable service
- Staff may want to note that the job seeker did appear at the one-stop center as a result of a call-in but there are other reportable services that may be more appropriate. Not a reportable service.
- Staff may add this service to denote that follow-up is being provided.

136 - Follow-up Contact

- Not a reportable service.
- Staff may add this service to denote that follow-up is being provided.

179 - *Outside Web-Link Job Referral**

- This service results when staff is assisting a job seeker with a job search and clicks on the “get more information” on a spider job.

160- *Meaningful RA Claim Assistance – Filed RA Claim**

161 - *Assistance Establishing Eligibility for Financial Aid – Adult**

162 - * TA Staff: Wagner-Peyser Initial Assessment’**

163 - * TAA Staff Individualized Education Plan (Training Plan)’**

164 - *Veteran Entered Federal Contractor Job**

165 - *Veteran Referred to Federal Contractor Job**

180 – 187 * Supportive Services**

- Credit can be taken in WP for referrals to these supportive services including:
 - Child/Dependent Care
 - Transportation Assistance
 - Medical
 - Temporary Shelter
 - Other
 - All customers can benefit from having the information necessary to obtain needed services provided by social and other service agencies operating in the community.
 - It is the customer’s choice whether or not to take advantage of these various services.
 - It is our responsibility to provide customers with specific information regarding the service provider, the type of service and how to access the services.
 - This information may be provided in person, by telephone, via e-mail or regular mail.
 - When this service is provided by one-stop staff, documentation of the type of supportive service and the agency the referral was given for should be recorded in the “Notes” screen at the time of service entry.

200 ***Individual Counseling

- Do not use in Basic Services.
- Individual employment counseling is the process whereby a one-stop center associate and a job seeker work together in order that the person may gain better understanding and knowledge of the world of work and more realistically choose, change, or adapt to a vocation.
- The “Notes” screen must be thoroughly documented with the vocational challenge and plan of each counseled customer.

201 ***Group Counseling

- Group counseling is the process whereby a one-stop center professional associate and job seekers work together in group activities in order that the job seekers may gain better understanding and knowledge of the world of work and more realistically choose, change, or adapt to a vocation.
- The “Notes” screen must be thoroughly documented with the vocational challenge and plan of each counseled customer.

202 ***Career Guidance/Planning

- Providing information regarding career opportunities which may include:
 - Occupational information
 - Training providers
 - Financial information
 - Steps to achieve the occupational goal
- **Documentation of the type of guidance/plan must be provided on the “Notes” screen.**

203 Objective Assessments

- A process that identifies service needs, goals, interests, academic levels, abilities, aptitudes, supportive service needs, and measures barriers and strengths.
- It includes a review of basic and occupational skills, prior work experience, the potential for employment, and developmental needs.
- **As a WP service, the objective assessment must be documented on the “Notes” screen.**

204 ***Interest and Aptitude Testing

- Individuals who are administered a standardized test. These tests measure the individual's possession of, interest in, or ability to acquire job skills and knowledge.
- This service can only be taken by the person administering the test.
- **Documentation of the name of the test and any pertinent information regarding the test results is required on the “Notes” screen.**

205 ***Develop Service Strategies (IEP/ISS/EDP).

- A document prepared by a staff person for a job seeker that identifies the strengths and weaknesses of the job seeker,
- includes a planned series of actions leading to employment, and specifies the employment, training and social services to be provided.
- The plan must be on file at the one-stop center for one year after the PY the service was provided, or, in the case of the automated ISS, the ISS must be available in the automated system.
- The job seeker must be provided with a copy.

206 – 211 and 214 -222 *Referral to Training**

- Referral to training includes:
 - Apprenticeships
 - Job Corps
 - Federal (non-WIA) Training
 - State and Local Training
 - Educational Services
 - WIA

206 – 211 and 214 -222 *Referral to Training**

- Referral to training includes:
 - Adult Literacy, Basic Skills or GED
 - Short Term Pre-Vocational Services
 - English as a Second Language
 -

212 *Other Intensive Services Not Otherwise Classified**

- If WP staff time is used to provide an intensive service, 212 may be used.
- **This must be documented on the “Notes” screen with the type of service provided.**

226 *Reading or Math Testing**

- Staff time is used to administer a reading or math test.
- **The name of the test and any other pertinent information must be provided on the “Notes” screen.**

300 – 324 *Enrolled in Training**

- Enrolled in training includes:
 - Job Corps
 - Other federal training
 - State and local training
 - Apprenticeship training
 - OJT
 - Customized training

306 - * Transitional Jobs**

307 - * Job Shadowing**

308 - * Prerequisite**

370 *Completed Training WP/Vets**

- Prerequisite “referred to training” before service can be taken.
- **Document on notes with name of completed program and institution.**
- Not in sequence and will not appear unless there has been a prior “referred to training.”

880 - Obtained Employment Manual

- Not a reportable service
- There is no report that uses this code.
- **If used, must document on the case notes the company, the person with whom the employment was verified and the date the job seeker started working.**