



# One Stop Service Tracking

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## Module 1: Overview

### Introduction to Module 1: Overview

Welcome to training for the One Stop Service Tracking system! For short, the system may be referred to as OSST throughout the course (**O**ne **S**top **S**ervice **T**racking). This course will span three days, and will focus on:

- Familiarizing you with how to operate in a web-based, case tracking environment.
- Familiarizing you with the customer management and caseload management functions within OSST
- Demonstrating the functionality within OSST
- Demonstrating how to access field, process and policy level help

This training guide is for your personal use. Please take notes throughout the course and keep this guide for your future reference.

- **What is the One Stop Service Tracking system?**
- **Who designed OSST?**
- **How will OSST help you do your work?**
- **How does OSST address some currently common challenges?**



### **What is the One Stop Service Tracking system?**

The One Stop Service Tracking system (OSST) is the new case tracking system that is being rolled out for the Welfare Transition and FSET programs. Soon you will use OSST instead of WAGES MIS to track case management activities and to provide data for state and federal level reporting.

The goal of the OSST project is to develop a system that enables local Workforce Development Boards and Service Providers to:

- more effectively track Welfare Transition and FSET customers and
- provide better access to customer information

### **Who designed OSST?**

Your Peers! One of the key teams assembled to define OSST was the OSST User Group. This group represents local WAGES users, WAGES supervisors, and WAGES and FSET policy makers from across the state and across various roles and levels of

responsibility. This group has been key in helping to define the requirements of the system, including how to provide enhanced case management capabilities for Career Managers.

System design began in May, 2000 and OSST is being piloted beginning January, 2001 within three Regional Workforce Boards, including: Region 12 (Workforce Central Florida), Region 15 (Hillsborough County Workforce Board) and Region 20 (Workforce Development Board of the Treasure Coast).

### **How will OSST help you do your work?**

OSST has been designed to help eliminate some of the challenges that you currently face, such as:

- Duplicate data entry
- High learning curve
- Difficulty tracking customer outcomes
- Losing customers in the pipeline (both in the FLORIDA batch interface and from a case management perspective)

### **How does OSST address some currently common challenges?**

Here are some examples...

#### Duplicate Data Entry

- You can use OSST to complete work registration for ODDS. The information required for work registration can be recorded in OSST and will be sent nightly to the ODDS system. As well, performance indicators previously entered via the ODDS H screen are captured in OSST and are sent to ODDS nightly.

#### High learning curve

- OSST provides three levels of help: 1) field level help provides context for specific fields throughout the system, 2) application help includes procedures and guidelines for completing a page or a set of related pages and 3) policy help provides links to current Welfare Transition policies, online
- Intuitive, easy to use interface that guides a Career Manager through the steps needed to start, update and manage various aspects of the case
- Eliminates codes. Instead, services and activities are spelled out. For example, instead of calling a Childcare service a 640, it is listed as "Childcare" in the system. Instead of calling Transitional Childcare a 650, it is listed as "Transitional Childcare."

#### Difficulty tracking customer outcomes

- In the example of a service ending, there is an outcome page that captures specific information such as the reason for the service ending and customer satisfaction with that service. There are similar outcome pages for training and other skill development activities.

Losing customers in the pipeline (both in the interface and from a case management perspective)

- (FLORIDA Interface) OSST provides the ability to view an “exception report” which lists cases that did not come through the FLORIDA batch interface due to a specific error. This report lists the case and the error that caused it not to come through correctly. While errors cannot be corrected via OSST, knowing the root cause of an error will assist with communications between Career Managers and the Department of Children and Families, who work together to resolve the issue.
- (Case Management) In OSST you view your cases on a Caseload page. In addition to customer identification information, this page includes a column that indicates the last date the customer’s case was updated. You will also receive to-do’s (reminders) that are triggered by specific events in a customer’s case. Examples of to do’s include: services or activities are anticipated to end, previously scheduled assessments are approaching and reminders to request a penalty to be imposed or lifted.



## Additional Benefits

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- Puts the World at Your Fingertips**
- Enhanced Case Tracking Functionality**
- Provides Accountability for Actions**
- User Friendly Environment**
- Skill Match Component**





Let's take a look at some more benefits of the system:

### **It Puts the World at your Fingertips**

Because it is a web-based tool, OSST provides you with access to the World Wide Web while you are performing case management activities. Want to check out the want ads on your on-line local paper to see if any of your employers are advertising available jobs? Maybe check out the website of a local training provider to see if any new courses are being offered? Just type in the web site address and you're there!

Additionally, being web-based allows jobseekers and employers to interact with the system. A core function of this system is a skill match component that allows your customers and unassisted jobseekers to seek employment opportunities. Jobseekers are able to create and maintain online resumes, search for employment opportunities and contact employers. Employers are able to post job orders to the system, search for qualified employees and contact jobseekers. Because OSST is a web-based system, it is accessible 24 hours a day, 7 days a week. Unassisted jobseekers and employers will not have access to case management capabilities within OSST.

### **Enhanced Case Tracking Functionality**

- Ability to add applicant cases to the system and track applicant services provided.
- Ability to capture the information that helps to better manage a customer's case. For example, you can now capture a customer's goals, barriers and steps to self-sufficiency online.
- Automatically generate a customer's Individual Responsibility Plan (IRP)
- Improved management reporting with drill down capabilities that allows you to view reports at the state, region, unit and Career Manager levels

### **Provides Accountability for Actions**

- All transactions in the system are stamped with a date, time and user ID. This means that you are able to view who has made what kind of changes to a case and when those changes were made.

### **User Friendly Environment**

- Access to field level, application level and policy level help
- Intuitive, easy to use interface that guides a Career Manager through the steps needed to start, update and manage all aspects of the case

### **Skill Match Component**

- Skill match provides an automated tool for matching jobseekers with employers based on skills instead of job title only.
- The application contains a "Guide Me" function to create online resumes for your customers. A component of the resume creation includes creating an objective related to a particular Occupational Employment Skills (OES) classification, which best describes the customer's previous work history or employment goal. Based on the job classification, you are presented with a list of skills that have been determined common for that job classification. You can indicate which skills customers have in relation to the skill set indicated for the particular occupation. The resume feature is available for customers too, from any browser, potentially one in your resource room.
- Customers can also search for available jobs that match their resume objectives and skill set.
- Employers can post job orders on the system, and are able to categorize their open jobs according to OES classifications. Part of the job order creation process requires the employer to identify the required and/or desired skills and level of skill for the job.
- Employers can search for available jobseekers based on their desired OES classification and pre-qualify jobseekers based on how the jobseeker matches with the employer's requirements.

**This course is intended to do the following:**

- ✓ **Familiarize you with how to operate in a web-based, case tracking environment**
- ✓ **Familiarize you with the customer management and caseload management functions within the One Stop Service Tracking system**
- ✓ **Demonstrate the enhanced functionality within the One Stop Service Tracking system**
- ✓ **Demonstrate how to access field, process and policy level help**



This course will focus on:

- Familiarizing you with how to operate in a web-based, case tracking environment
- Familiarizing you with the customer management and caseload management functions within OSST
- Demonstrating the enhanced functionality within OSST
- Demonstrating how to access field, application and policy level help

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**Introductions**

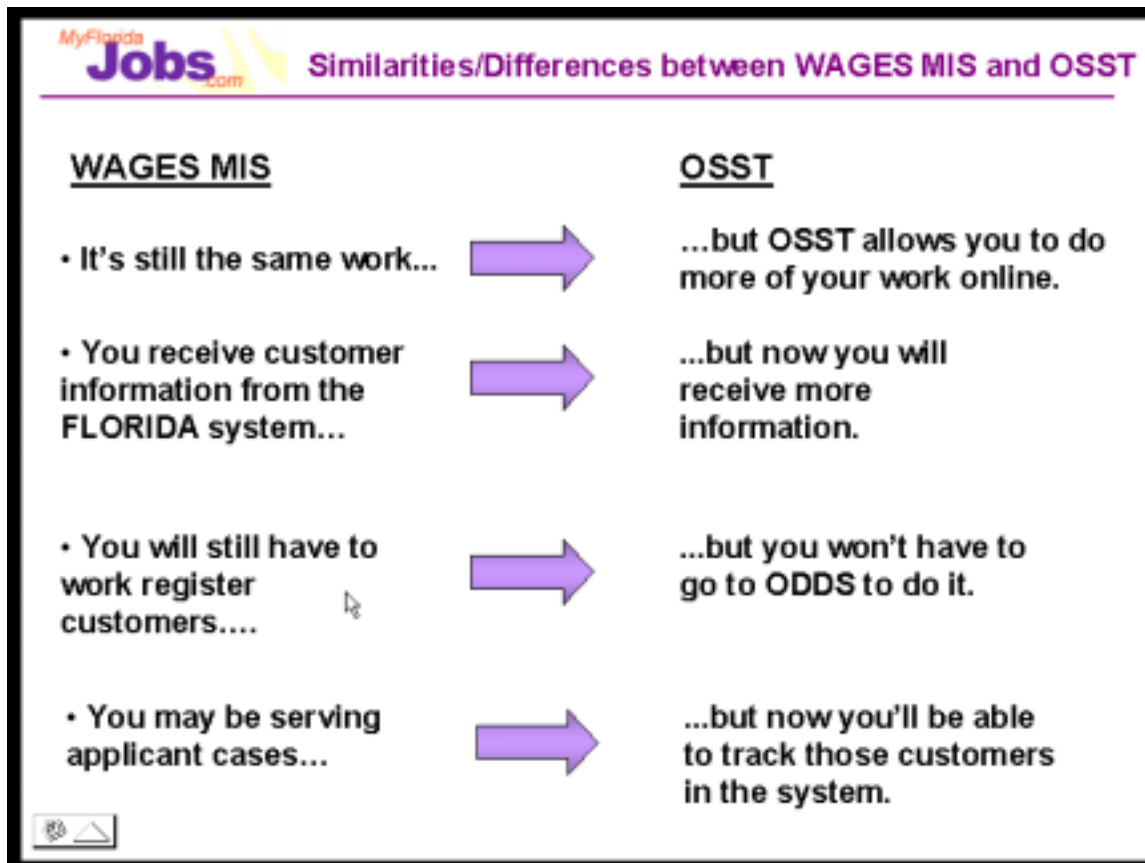
- **Name**
- **Location**
- **Job Title**
- **Expectations for this course**





**At the end of this module, you will be able to:**

- ✓ **Explain the differences between WAGES MIS and the One Stop Service Tracking system (OSST)**
- ✓ **Explain the benefits of using OSST to complete tasks**
- ✓ **Understand the General Navigation of OSST**
- ✓ **Login to the system**



**It's still the same work....but OSST allows you to do more of your work online.**

OSST has been designed with your business processes in mind. Examples of some of the functions you will now be able to capture online include: Goals and Interests, Needs and Barriers, Steps to Self Sufficiency, Hardships, Deferrals and Individual Responsibility Plans.

**You receive customer information from the FLORIDA system....but now you will receive more.**

In addition to the information that you receive from the WAGES MIS benefit (BEN) screen, OSST will now provide you with additional Household Member Information (all children, including those over the age of 12 and the registration status of Household Members).

**You will still have to work register customers....but you won't have to go to ODDS to do it.**


OSST has an interface with the ODDS system, which means that the work registration information that is added for a customer is automatically populated to the ODDS system. This information is completed when you add a new customer to the system.

**You will be creating applicant cases....but now you'll be able to track those customers in the system.**

OSST has the ability to add new customers to the system. This allows the Career Manager to track applicant services online.

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.com**General Navigation**

- **Clicking and Pointing**
- **General Layout**
- **Desktop Functions**
- **On Line Help**
  - **Field Level**
  - **Application Level**
  - **Policy Level**
  - **Wizards**
  
- **Common Features**

A collection of browser navigation icons arranged in a circular pattern. The icons include: Back (left arrow), Forward (right arrow), Stop (red X), Refresh (circular arrow), Home (house), Print (printer), and Reload (circular arrow with refresh symbol).

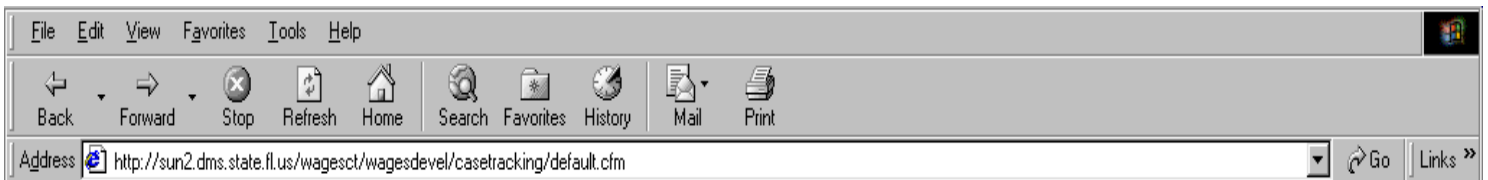
## Clicking and Pointing

Because we are using a web-based application, using the mouse is your main tool for navigation. This is different from WAGES MIS where you typically use the 'Tab' key to navigate through the system. Much of the navigation within OSST requires you to click on hyperlinks. Hyperlinks are easy to spot, since they appear in a different color from the rest of the text (usually blue, although this is a setting you can control through your browser settings) and always underlined.

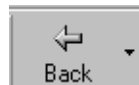
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## General Layout

### • Browser Tool Bar



The most useful buttons on your browser toolbar include:



**Back:** Returns you to the previous page.



**Forward:** Returns you to a page you have backed up from.



**Home:** Takes you to the home page specified in the browser settings.



**Refresh:** Downloads the web page from the server again.



**Stop:** Stops the browser from loading the current page.



**Print:** Allows you to make a hard copy of the current web page or active frame in the browser.

While browser toolbar functions are operational in OSST, it is recommended that you use the application navigation buttons in the top right corner to perform the following functions:



**Home**

**Home:** Returns you to the Login page for OSST



**Back**

**Back:** Returns you to the previous page



**Desk**

**Desk:** Returns you to the OSST Desktop



**Help**

**Help:** Takes you to the application level help



**Note**

**Note:** Allows you enter a case note



### • **Control Panel**

The Control Panel is located along the left side of the page and allows you to navigate to your Open Customer Cases, your Closed Customer Cases, Job Search Functions and Management Reporting.

### • **Main Work Area**

The Main Work Area is the area in which you view the page that you are working on at any given time.

## On Line Help

OSST provides you with four levels of help. They are:

- **Field Level Help:** Help at the individual field level. Many fields have red help bubbles next to them. You can click the help bubble and read the associated text at the top of the page to gain a better understanding of the intent and requirements of a field.

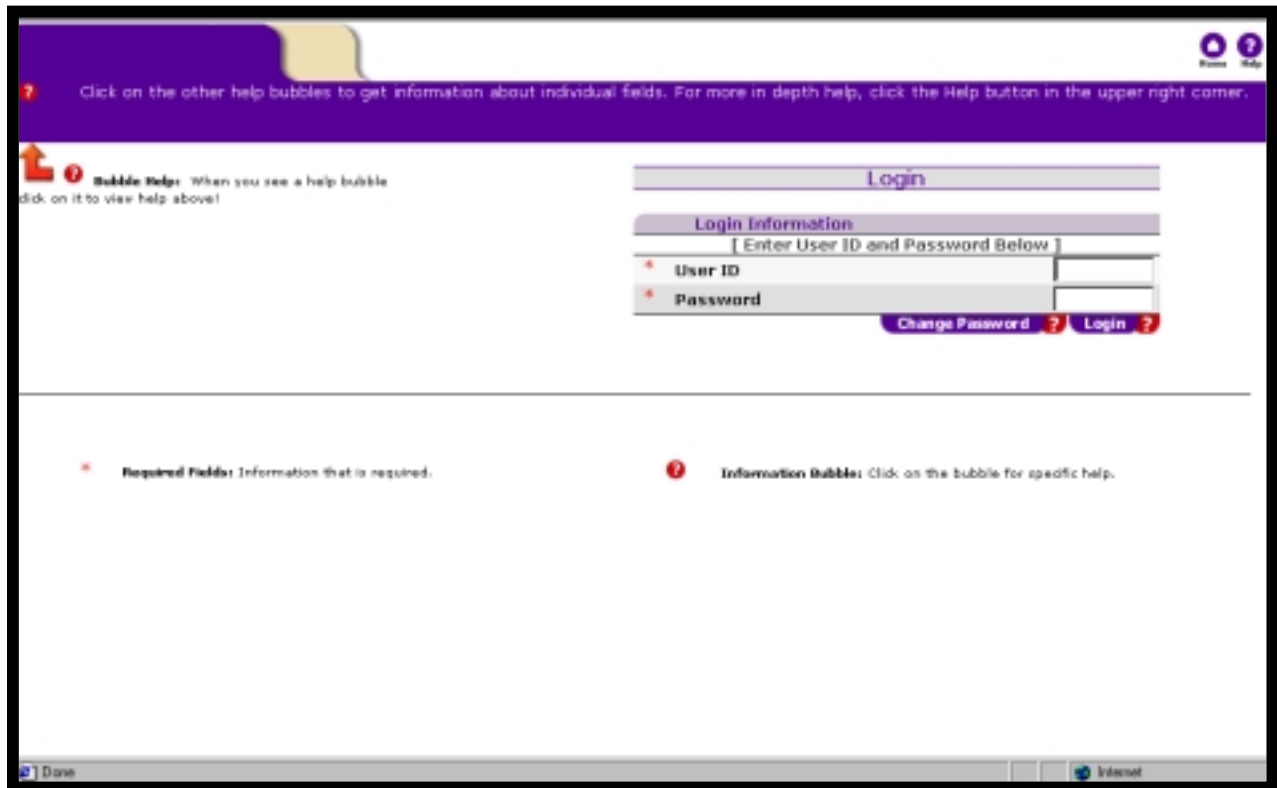
- Application Level Help: Help at the page level. You can click the help icon at the top right of any page in the application to navigate to application level help. You can then search on a specific topic to read the associated help text.
- Policy Level Help: Guidance provided by state policies. These policies are currently found on the Workforce Florida Inc. website. You can click on a link within the application level help text to navigate to the related policy on Workforce Florida's site.
- Wizards: OSST also includes several wizards to help guide you through business functions. The system includes the following wizards: Resume, Close Case, Personal Budget, Work Registration, Management Reports, Individual Responsibility Plan, Correspondence and the Penalty process.

## Common Features

Here are a handful of common features available throughout OSST.

- Red asterisks on a given page signify fields that must be completed before continuing on to another page. These fields are required.
- Red question marks are Help bubbles that provide point-of need help is available when clicked.
- **'Save'** button: Stores any changes that have been made to the information on a page since the last time the 'Save' button was clicked.
- **'Clear Changes'** button: Clears any changes that have been entered since the last time the 'Save' button was clicked.
- **'Cancel'** button: Allows you to get out of the current page and not store any of the informational changes that have been made.
- **'Sort'** button: Allows you to view information according to a specific parameter.
- **'Add'** button: Allows you to add new information that is not currently in the system.
- **'Edit'** button: Allows you to make changes to information that is currently in the system.
- **'Search'** button: Allows you to search for information based on specific search parameters.





## Your New User ID and Password

Your user ID and password will not be the same in OSST as they are in WAGES MIS. You will be receiving your new password before your region is scheduled to begin using OSST. You will still be required to change your password every 30 days. User IDs and passwords can be alpha or numeric. Passwords can range between 1 and 10 characters and are case sensitive.

### Associated Procedures:

#### I. Login to OSST

**ENTER** your User ID and Password

**CLICK** 'Login' (or press the 'Enter' key on your keyboard)

The result of completing these procedures takes you to the OSST Desktop.

The screenshot shows a web browser window with a purple header bar. The header contains the text "Service Tracking" on the left and "Home" and "Help" icons on the right. Below the header is a purple banner with a red question mark icon and the text: "Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner." The main content area is white and contains a form titled "Change Password" with a subtitle "[ Enter a new password below ]". The form has four rows, each with a red asterisk icon on the left and a red question mark icon on the right. The first row is labeled "User ID" and contains the text "STARLUR". The second row is labeled "Current Password" and contains a series of asterisks. The third row is labeled "New Password" and is empty. The fourth row is labeled "Confirm New Password" and is empty. At the bottom right of the form is a purple button labeled "Continue" with a red question mark icon. The browser's taskbar is visible at the bottom, showing a mouse cursor, a lock icon, and the text "Internet".

## Changing your Password

You may change your Password by clicking the 'Change Password' button located next to the Login button. The Change Password page appears that prompts you to enter your old Password, and to type and verify your new Password. Once you have completed the fields, click the 'Continue' button to return to the main OSST Login page.

### Associated Procedures:

#### II. Change OSST password

From the OSST Login page,

**ENTER** your User ID and current password

**CLICK** 'Change Password'

**ENTER** your new password

**REENTER** your new password

**CLICK** 'Continue' (View message box that tells user the password has been updated)

**CLICK** 'OK'

**Helpful Tips:**

**Tip 1:** Memorize your OSST User ID and password, you will need them each time you log onto the OSST system.

**Tip 2:** If you need your password reset, you should contact your local Security Officer to request a password reset.

In this module we discussed some of the key differences between WAGES MIS and OSST. We also mentioned some of the benefits of OSST, general navigation techniques and how to login in to OSST. The next module covers the processes and procedures involved in the intake of a customer.

