Introduction to Module 6: Generating the Individual Responsibility Plan

The One Stop Service Tracking System provides you with the ability to create and maintain an online Individual Responsibility Plan. The plan is automatically generated from the customer information that you enter in other parts of the application.

For example, entering the details related to a customer’s long term employment goals or needs and barriers are automatically generated in the Individual Responsibility Plan. The career manager has control over which parts of the Individual Responsibility Plan should be generated, and to what level of detail. Let’s take a look at how this works…
Module 6: Generating the Individual Responsibility Plan

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

✓ View a customer’s Individual Responsibility Plan
✓ Edit portions of a customer’s Individual Responsibility Plan
✓ Preview and print a customer’s Individual Responsibility Plan
✓ Complete the Budget Planner Wizard

To understand the procedures associated with generating a customer’s Individual Responsibility Plan, we will go through the following functions:

• Viewing a customer’s Individual Responsibility Plan
• Editing portions of a customer’s Individual Responsibility Plan
• Previewing and printing a customer’s Individual Responsibility Plan
• Completing the Budget Planner Wizard within OSST
Selecting the Sections to include on the customer’s Individual Responsibility Plan

The Individual Responsibility Plan is populated with information from many other sections of the application. Prior to the plan being generated, you are prompted with this “Select” page, which allows you to choose the specific sections of the Individual Responsibility Plan that you wish to see. You may choose to view one or all of the following:

- Short Term Employment
- Long Term Employment
- Barriers
- Deferrals
- Countable Work Activities
- Other Activities
- Supportive Services
- Steps to Self Sufficiency
Click the check box to the right of the text to select the information you wish to view. After selecting the information you wish to view, click the ‘Continue’ button at the bottom of the page to go to preview the resulting plan.

Associated Procedures:

CLICK ‘View’ on the Individual Responsibility Plan tab to begin

CLICK the check boxes next to the sections that you DO NOT want included on the generated plan. (The system defaults to select all sections.)

CLICK ‘Continue’ to preview the resulting plan
Generating the IRP

As of 01/01/01

Viewing the Plan

This page displays the information for the sections that you selected from the previous page. From here, you can view and edit specific information from any of the subheadings before printing the display.

Clicking on the hyperlinks under each section takes you to the specific pages where the detail is kept for those goals, activities, services, etc. You can edit the associated detail and then click the ‘Save’ button to return to the Individual Responsibility Plan. These changes are saved, and the Individual Responsibility Plan view page will automatically show your updated information.

The IRP Completion/Last Plan Update section was not listed as an option on the selection page. This section is always displayed. The date the IRP is initially created and signed by both the customer and career manager is captured in the IRP Completion Date field. Updates to the IRP are also captured in this section.

Click the ‘View to Print’ button once you are satisfied with the information listed. This gives you a print preview of the plan.
Clicking the ‘Change Layout’ button takes you back to the ‘Select section’ page where you can change the selected areas that generate to the plan.

**Associated Procedures:**

I. **Adding the IRP Completion Date and Last IRP Update**

**ENTER** the date the IRP was completed and signed by the Customer and Career Manager

**ENTER** the date the IRP was last updated by the Career Manager (system defaults to the current date, but you can overwrite this if appropriate)

**CLICK** ‘Save’

II. **Changing the Layout of the Individual Responsibility Plan**

**CLICK** ‘Change Layout’ (message box to confirm this actions appears)

**SELECT** the sections you would like to be generated to the plan

**CLICK** ‘Continue’
Generating the IRP

As of 01/01/01

Printing the Individual Responsibility Plan

Clicking the ‘View to Print’ button presents you with a printable version of the Individual Responsibility Plan. From here, you can click the ‘Print’ button on your browser tool bar or select ‘File’ then ‘Print’ from your menu options in your browser.

The customer’s plan will be printed out, complete with the required acknowledgements and the signature areas for the career manager and the customer.
Associated Procedures:

Prior to printing the IRP, you must first make sure that your margins for the page are correct. The margins must be set to zero to ensure that nothing on the page is cut off when printed.

I. Setting Page Margins:

CLICK ‘File’ from your browser menu

SELECT ‘Page Setup’ from your menu options

MAKE the ‘Top’, ‘Bottom’, ‘Left’ and ‘Right’ margins equal to zero

CLICK ‘OK’

II. Printing the Individual Responsibility Plan using the ‘Print’ icon

CLICK the ‘Print’ icon from your browser tool bar

CLOSE the printable version of the plan by clicking the ‘X’ in the top right hand corner of the page

III. Printing the Individual Responsibility Plan using your menu options

CLICK ‘File’ from your browser menu

SELECT ‘Print’ from the menu options

CLOSE the printable version of the plan by clicking the ‘X’ in the top right hand corner of the page
Completing the Budget Planner Wizard

OSST contains a budget planner wizard that can be used to develop a personal budget plan for your customers. The budget planner takes into account the number of adults and children in the family, the monthly current and projected expenses and the monthly current and projected income. The outcome of completing the budget planner wizard is a one page summary that can be printed for future reference. The key information displayed on the summary is the projected net hourly wage needing to be earned for the budget to remain balanced between income and expenses.

Associated Procedures:

I. Defining number of people in household:

CLICK on the Budget Planner hyperlink on the Control Panel

ENTER the number of adults in the household

ENTER the number of children in the household
**II. Defining all sources of income:**

- **ENTER** the dollars and cents amount for each potential income source listed
- **CLICK** the ‘Add’ button
- **CLICK** the ‘Continue’ button
III. Defining all sources of expense:

**ENTER** the dollars and cents amount for each potential expense listed

**CLICK** the ‘Add’ button

**CLICK** the ‘Continue’ button
Now it’s your turn to practice using the system! Let’s start by taking your sample new case and performing the tasks associated with the following scenarios:

- Selecting the sections that will be generated to the customer’s Individual Responsibility Plan
- Viewing a customer’s Individual Responsibility Plan
- Printing an Individual Responsibility Plan
- Complete the Budget Planner Wizard
Questions?