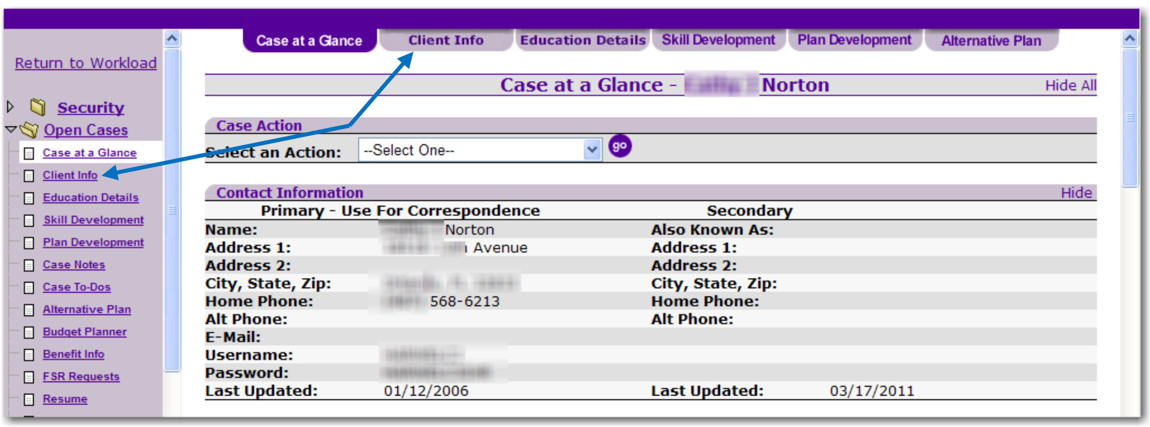
Client Information

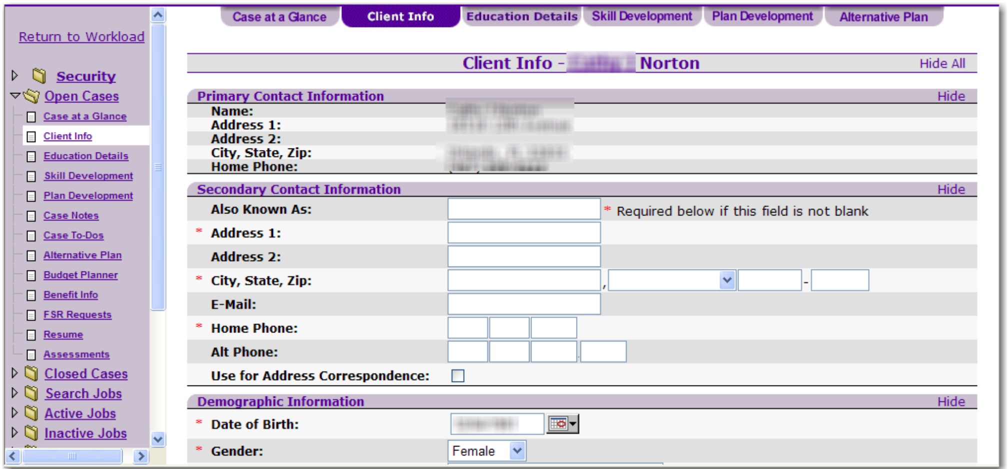
To access the ***Client Information*** (Client Info) page you must first log into the One Stop Service Tracking (OSST) system. To log into the system, you must have an OSST user account, user ID and password. If you do not have an account, User ID and password, please contact your Regional Security Officer (RSO). If you are a Regional Security Officer and do not have an account, please contact the Department of Economic Opportunity's (DEO's) Internal System Security Officer (ISSO).

The ***Client Info*** page in OSST allows you to record and update customer information. Data recorded on the ***Client Info*** page will be displayed on the participant's *Case at a Glance* screen. To learn more about the Case at a Glance screen, please review the *Case-at-a Glance* User Guide.

1. To access the participant's ***Client Info*** page, you must navigate to their case. You can do this by typing in the customer's OSST ID, SSN, or their FLORIDA Case Number. Learn more about Navigating to a Case. Once you have navigated to the participant's case, you will be able to select Client Info from the overhead folder tab or on the left hand navigation menu.



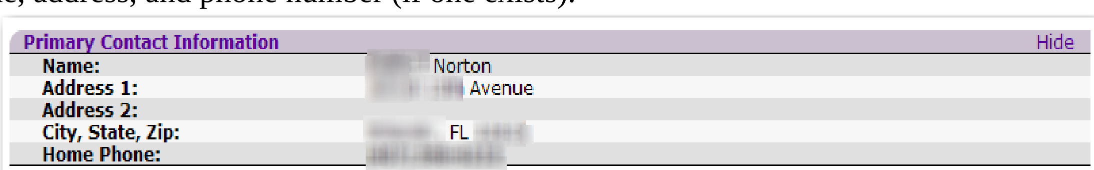
2. The customer's ***Client Info*** page will display after selecting from either the left-hand navigation menu or overhead tab. The ***Client Info*** page contains customer information which may be edited, as needed. Saved changes made on the Client Info page will display on the customer's Case at a Glance page.



3. The following illustration shows the type of information that can be found on the ***Client Info*** page. This illustration shows the screen in collapsed mode. This means that all of the specific information about the participant is hidden and just the screen sections are displayed.

Primary Contact Information

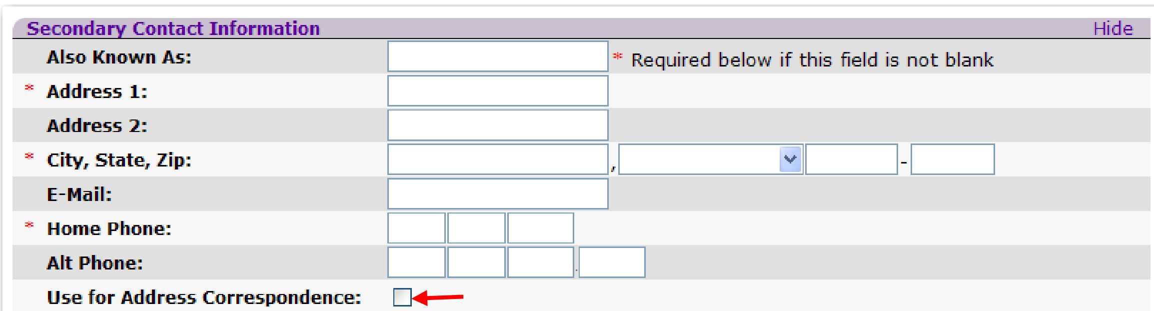
4. The first section on the ***Client Info*** page is "***Primary Contact Information***." This is the customer's primary contact or correspondence information. It contains the participant's name, address, and phone number (if one exists).



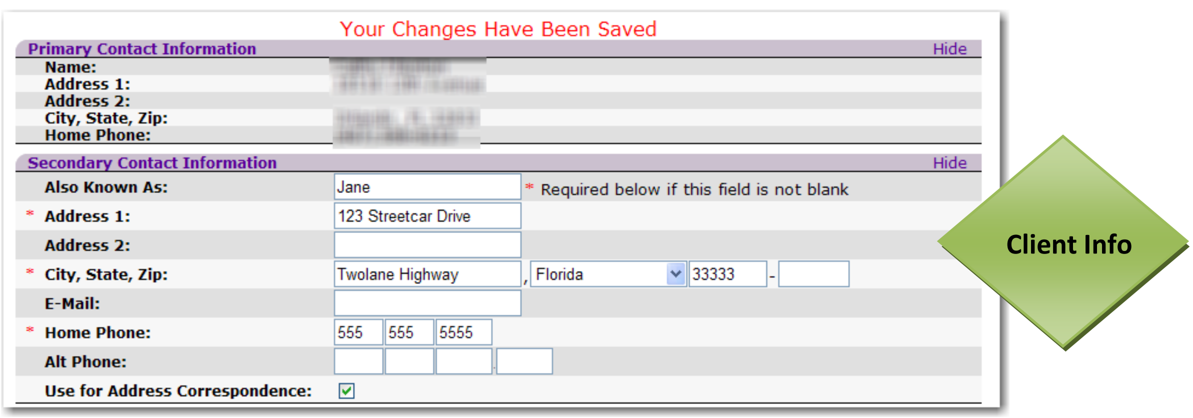
Note: If the case was created by the system's interface with the Department of Children and Families system, FLORIDA, the primary contact information will not be editable.

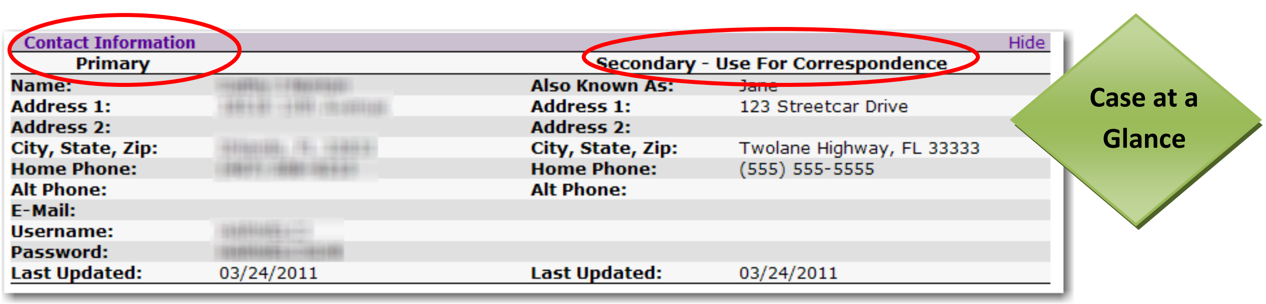
Secondary Contact Information

5. The ***Secondary Contact Information*** section can be used to record any secondary contact information for the participant. A red asterisk (*) means that the field is required. If you enter information in the address field in the Secondary Contact Information section, the system will require the customer's city, state, zip code, and home phone number. You may also use the secondary contact information for correspondence by checking the "*Use Address for Correspondence*" box.



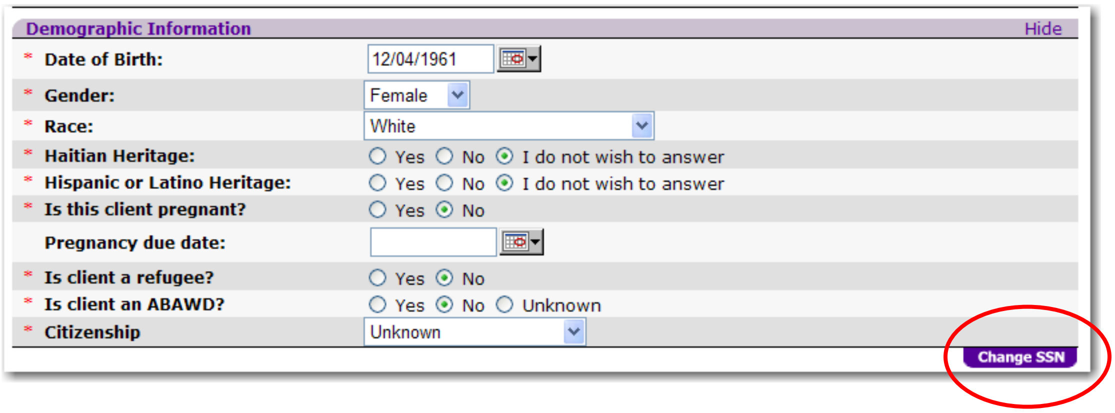
Below is an illustration of the updated ***Client Info*** page and the Display on Case at a Glance after the information has been edited.



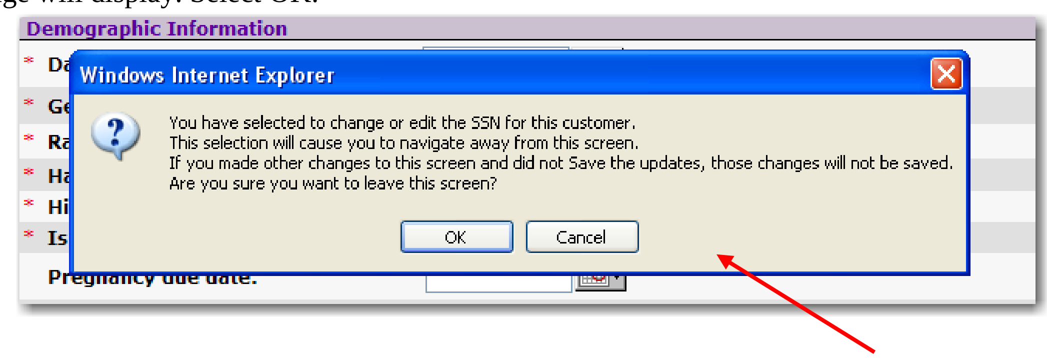


Demographic Information

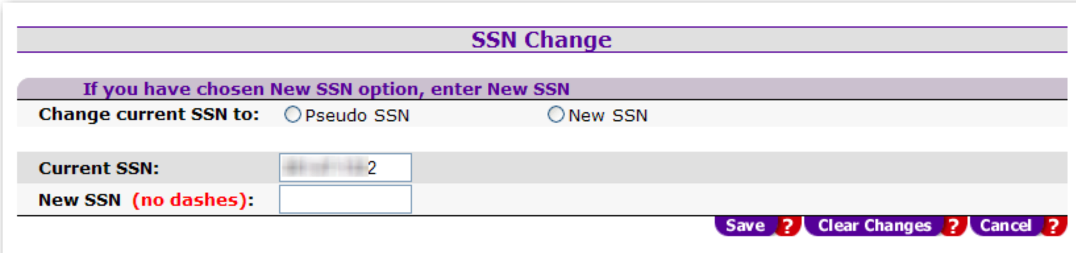
6. The ***Demographic information*** section provides specific information about the participant (e.g. date of birth, gender, race, heritage, and citizenship status). If the participant is in the Supplemental Nutrition Assistance Program (SNAP) the system will inform the user whether or not the customer is an Able Bodied Adult without Dependants (ABAWD). Remember, anything with a red asterisk (*) is a required field. If the case is created via the FLORIDA to OSST interface, most of this information will have been automatically completed by that interface. Additionally, OSST will automatically set most of these answers to a default response.



7. You can also change the participant's Social Security Number (SSN) at this level. The change SSN button is available at the bottom right hand corner of the **Demographic Information** section. Click the change SSN button to take steps to change the participant's SSN. When you click it, the following message will display. Select OK.

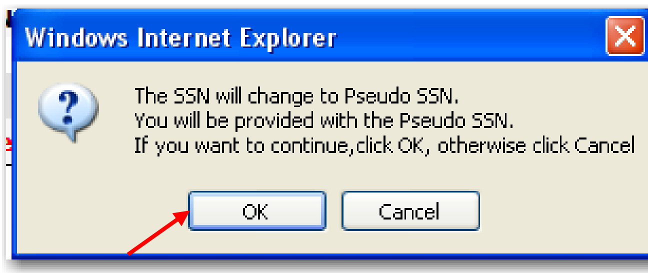


8. Once you have selected OK, a new screen will appear displaying the participant's current SSN and gives you the option to select a *Pseudo* or fake SSN or enter a new SSN.

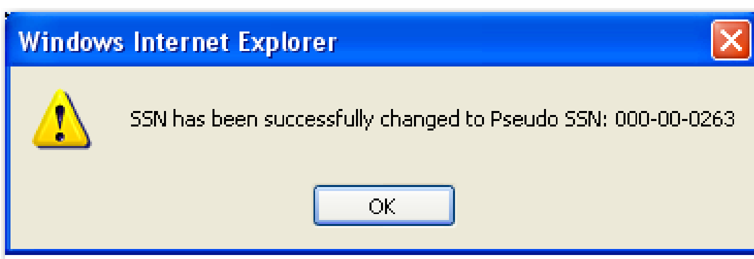


9. To assign a Pseudo SSN to the case, you will select the Pseudo SSN radio button and click Save.

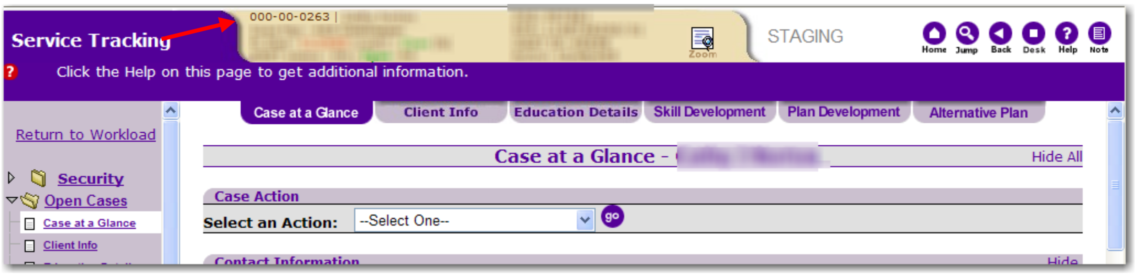
10. After you click save, the following message will display. Select OK.



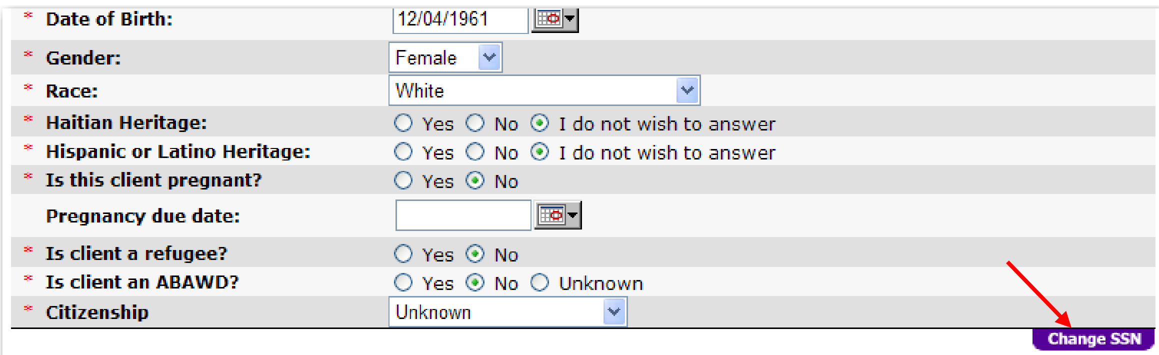
11. Once you have selected OK, the system will confirm that the action was successful and provide you with the *Pseudo* or fake SSN. Select OK.



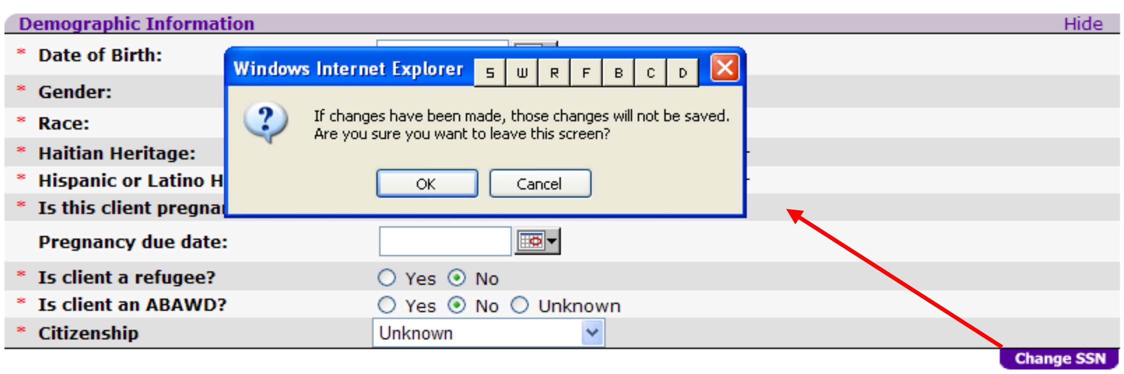
12. Now that you have selected OK to the confirmation message, you will go back to the participant's Case at a Glance page. The participant's Pseudo SSN will now be displayed on the manila tab.



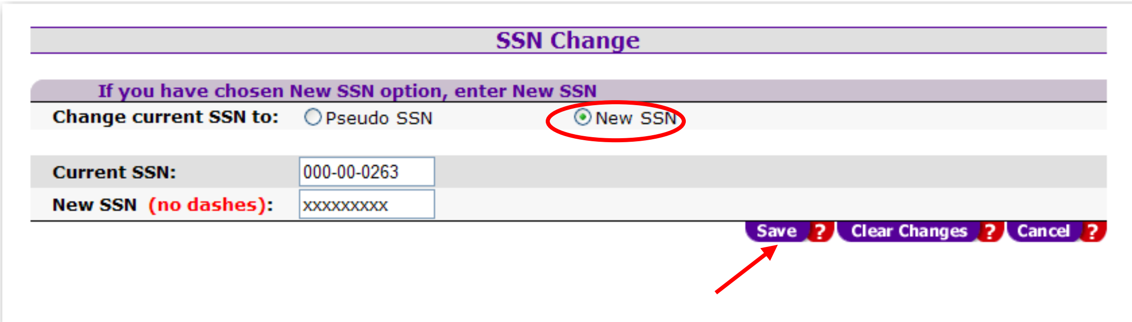
13. To change the SSN to a new SSN, you will click on the change SSN tab at the bottom of the **Demographic Information** section on the **Client Info** page.



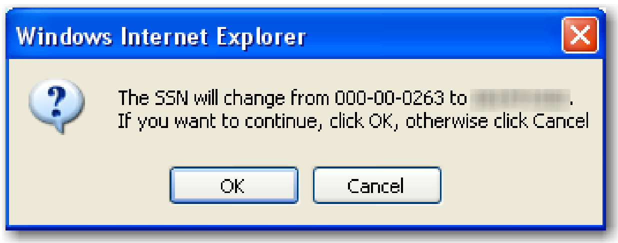
14. Once again, when you click on the Change SSN button, the following message will display. Select OK.



15. Next, the following screen will display and you will enter the desired SSN (without dashes). For illustration purposes, we typed in a series of the letter "X" in the New SSN field on the screen.



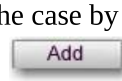
16. After selecting Save, a notification will inform you that the SSN will change from the old SSN to the new SSN. If the information is correct, select OK.

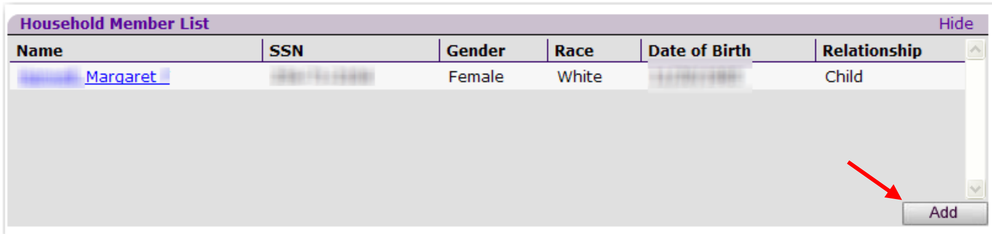


17. After you have selected OK, a confirmation message will display stating that the action was successful.

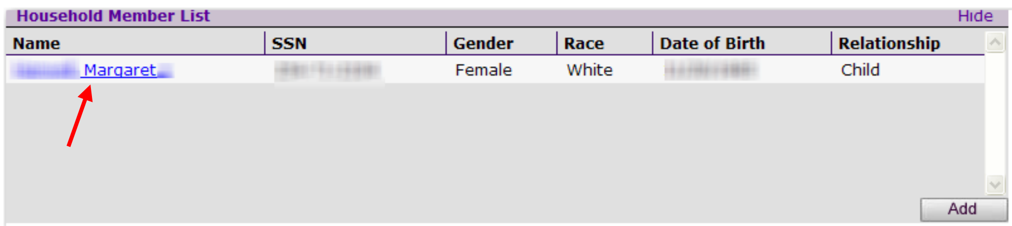
<u>Household Member List</u>

18. The next section on the Client Info page is the ***Household Member List*** section. It gives information about the people in the household associated with the participant's case. This section contains the name, SSN, gender, race, date of birth and relationship the individual has to the participant. You can view specific information about household members on the case by clicking on the hyperlinked name.

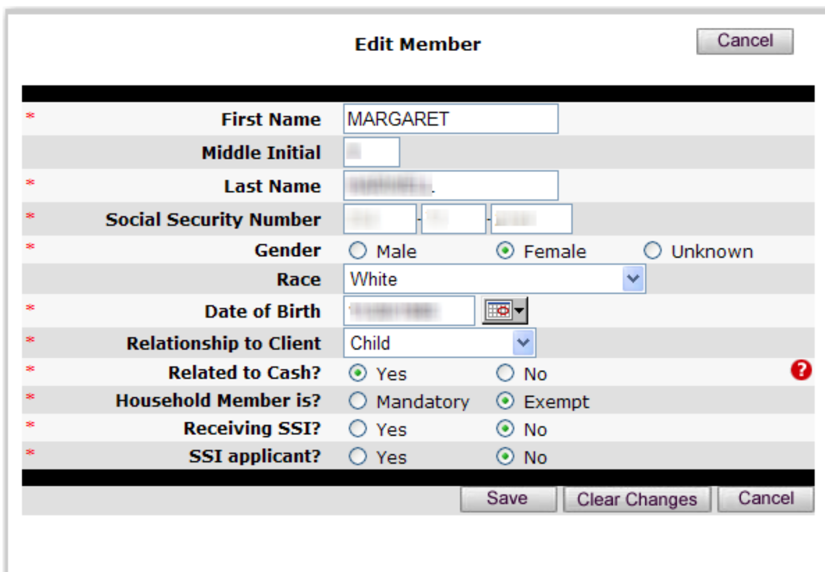
    You can also add members to this section by clicking the  button at the right hand corner of the ***Household Member List*** section.



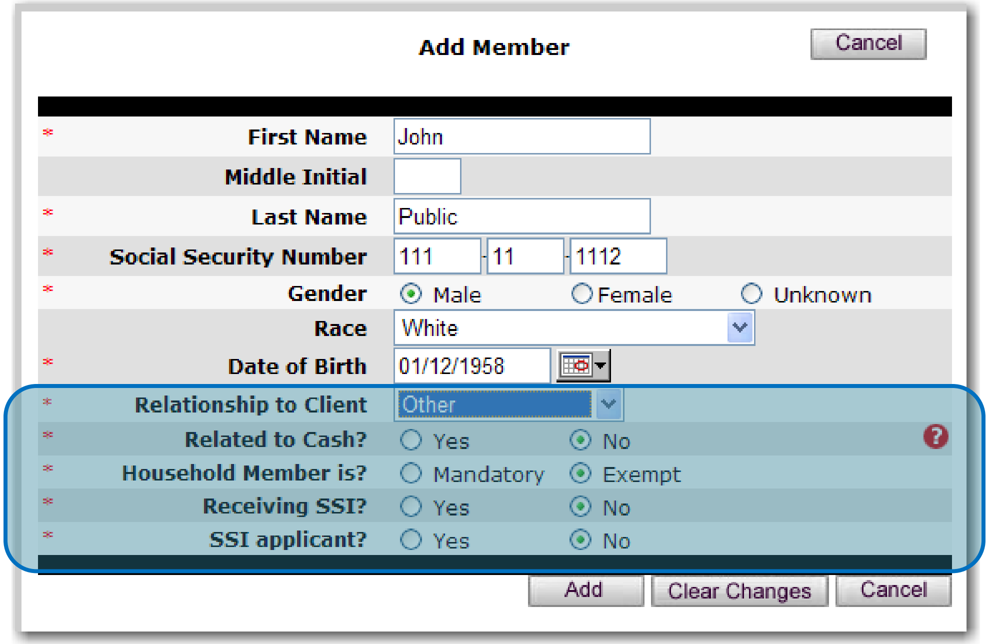
19. To see specific information about a household member, you will click on the hyperlinked name.



20. Once you have clicked on the household member's name, the system will display information about the household member.

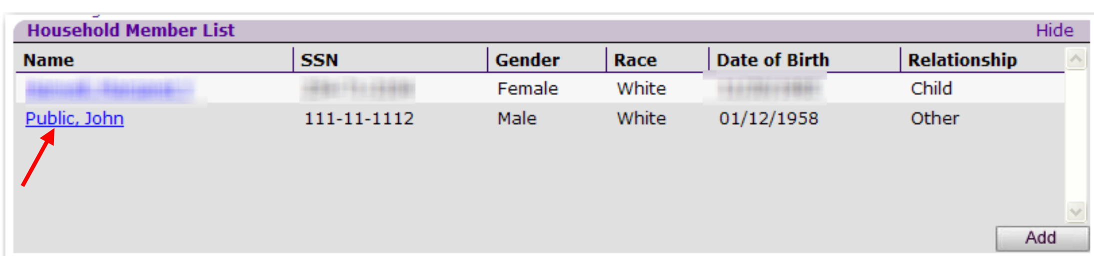


21. To add a household member, click on the Add button on the bottom right hand corner of the ***Household Member List*** section. After you have selected the add button, the following screen will display. We entered information about John Public and selected his relationship with the participant as "*other*." The shaded questions have to be answered if you are adding a new person to the Household Member List. The system sets them to the default displayed below. To save this entry, you will click the Add button on bottom of the box.

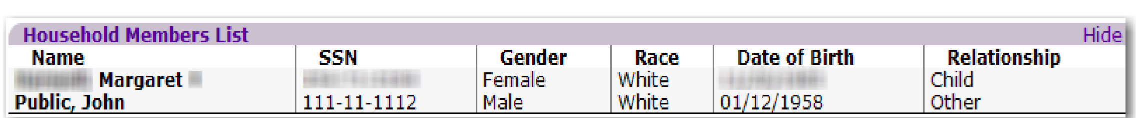


Note: If the case is created by the system interface, any household member already on the case will have defaults established depending on the participant's program and the relationship of the household member to the participant. To learn more about Household Member information, review the Case-at-a Glance step guide.

22. After clicking the Add button, the new entry will display on the Client Info page.

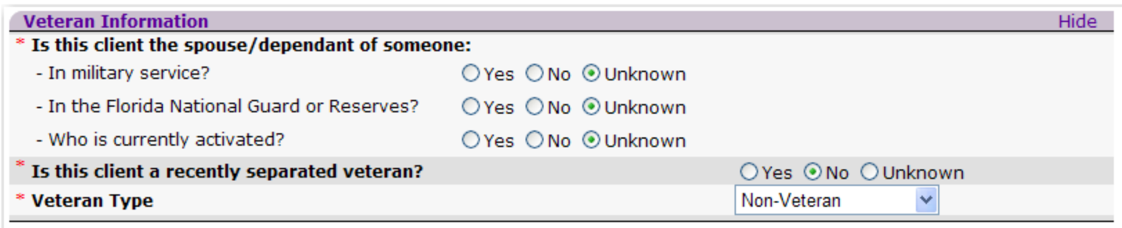


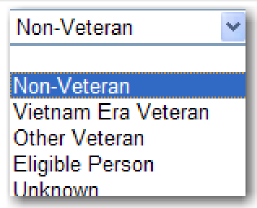
Remember: Information edited on the Client Info page will display on the *Case at a Glance* screen. Below is a screen shot of the Demographic Information from the ***Case at a Glance*** screen.



Veteran Information

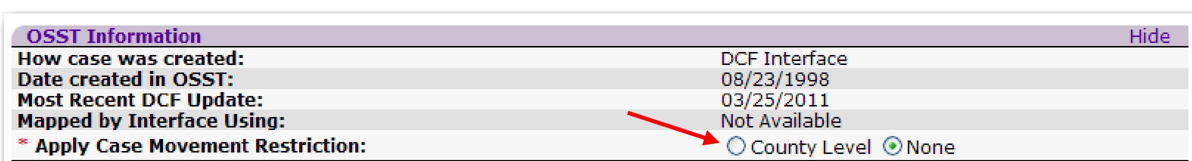
23. The ***Veteran Information*** section provides information on the customer's veteran status or whether the customer is the spouse or dependant of someone in military service. Answers to these questions default to *unknown*. You may change the information if the SNAP or WT participant is a veteran or is the dependant or spouse of someone in the military. Changes made here will also on the participant's *Case at a Glance* screen.





OSST Information

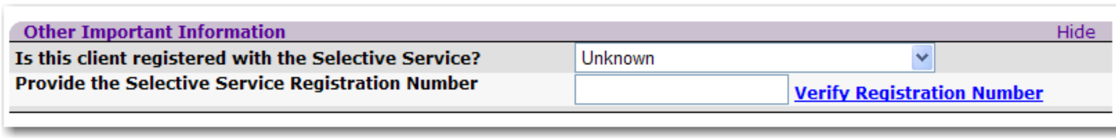
24. The ***OSST Information*** section is page is informational with the exception of the "*Apply Case Movement Restriction*" field. Some regions have specialized units for certain populations. For example, a region may have a specialized unit in which all of their medically deferred participants are assigned regardless of the participant's zip code. Cases are referred to a particular region/county/unit or RCU based on regional mapping instructions for each zip code in the region. The *Apply Case Movement Restriction* will allow case managers to send the customer's case to the specialized unit and if the radio button for ***County Level*** is selected, the case will stay in that unit through any open/closure iteration for the participant in the specialized unit. If ***none*** is selected and the case closes and opens again, the case will be mapped based on the region's zip code mapping requirement.



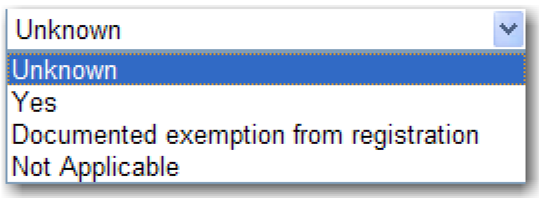
The information displayed in the OSST Information section is how the case was created, the date the case was created in OSST, the most recent DCF update, and mapping information. See Case-at-a Glance guide for more detail.

Other Important Information

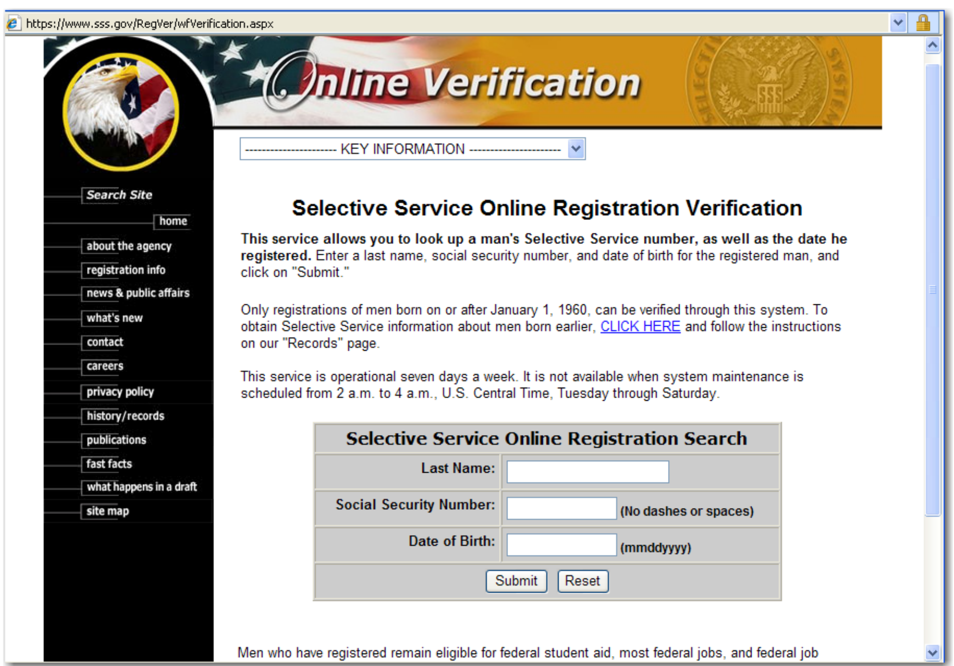
25. The ***Other Important Information*** section specifically addresses whether the customer is registered with the **Selective Service**. These are not required fields.



The question, "Is this client registered with the Selective Service?" defaults to *unknown*. You have a choice of the following options if you wish to change the response.



Additionally, if you want to record and verify the Selective Service Registration Number, you can click the Verify Registration Number hyperlink on the screen and it will take you to the website to verify this information. See illustration below.

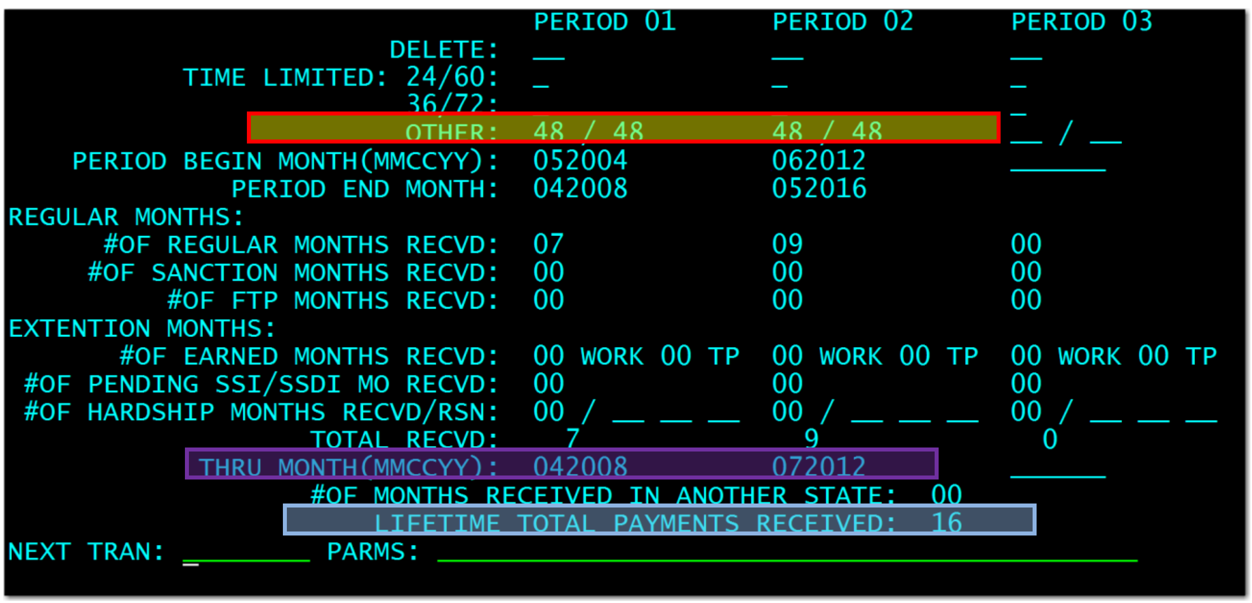


After verifying the information, you may record the number in the appropriate field.

Cash Assistance Time Limit Information

26. The ***Cash Assistance Time Limit Information*** section provides information about the participants Temporary Cash Assistance (TCA) time limits, if applicable. This information comes from FLORIDA, but can be edited by Regional Workforce Board (RWB) staff. The information that comes over from FLORIDA is information from the system's ARCA screen, where information about time limits is housed. Since the DCF worker must update this information, the data that comes over from FLORIDA is based on the last update made by the DCF Economic Self-Sufficiency Specialist or ESS. If the information is available, the ARCA update date, time limit, number of months used and through date will be populated. Again, RWB staff may edit this information in OSST. To update this section, staff is encouraged to review the information on FLORIDA's ARCA screen.

    After logging in to FLORIDA, the case manager should go to the ARCA screen to review the most up-to-date information based on DCF. Staff will use the information in the highlighted sections to update the Cash Assistance Time Limit Information in OSST.



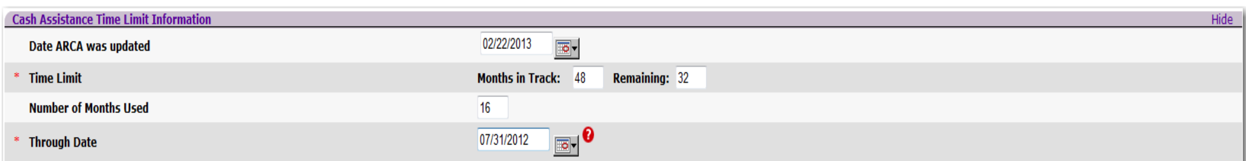
To update the Time Limit field in OSST, staff will review information on the ARCA screen next to the "Time Limited" information (highlighted in yellow) on ARCA. As illustrated in the example, the user will see 24/60, 36/72 and other. In the past, time limited cash assistance recipients were assigned a duration of time that they could receive cash assistance or "periods" of time they could receive cash assistance. Someone with a high school diploma or GED and work skills would receive 24/60, which meant that they could receive 24 months of cash assistance in a 60 month time period. A person who received 24 months of cash assistance without a break would be required to wait 36 months before becoming eligible again to receive the remaining 24 months of their time limited assistance.

Staff will not use 24/60 or 36/72 to update the time limit field in OSST. The time limit is 48 and staff will select the 48 radio button next to this field if the information in FLORIDA reads 48/48. If the field in

FLORIDA reads beyond 48 months, staff would select the "other" radio button and enter the number of months from the ARCA screen. For example, if the ARCA screen shows 60/60, staff will select other and enter 60 in the text field.

To determine what to enter in the **Number of Months Used** field, staff will need to look at the last line on the ARCA screen (highlighted in blue): LIFETIME TOTAL PAYMENTS RECEIVED. In the above example, it is 16.

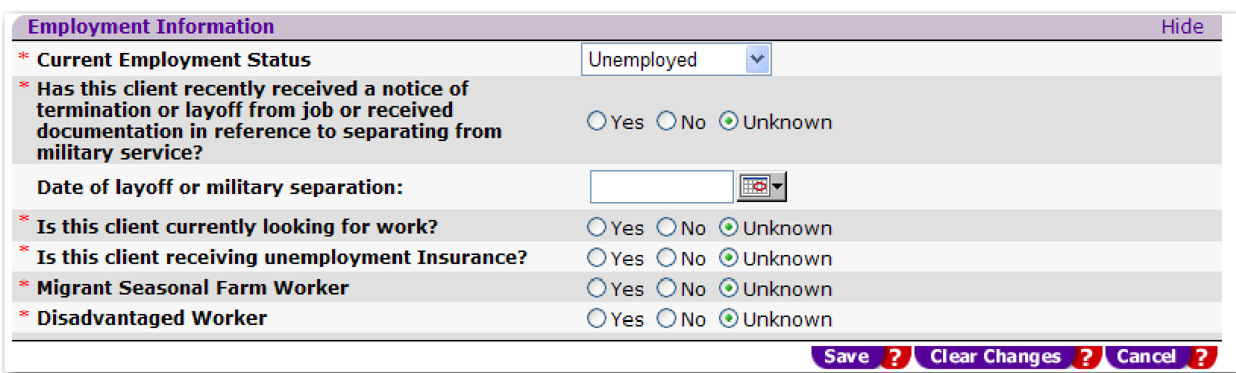
To determine the "**Through Date**", staff will review the "**THRU MONTH**" on the ARCA screen (highlighted in purple). Staff would use the most recent date as the through month. In the example, the most recent THRU DATE is 7/2012. A completed example follows.



Cash Assistance Time Limit Information	Hide
Date ARCA was updated	02/22/2013
* Time Limit	Months in Track: 48 Remaining: 32
Number of Months Used	16
* Through Date	07/31/2012

Employment Information

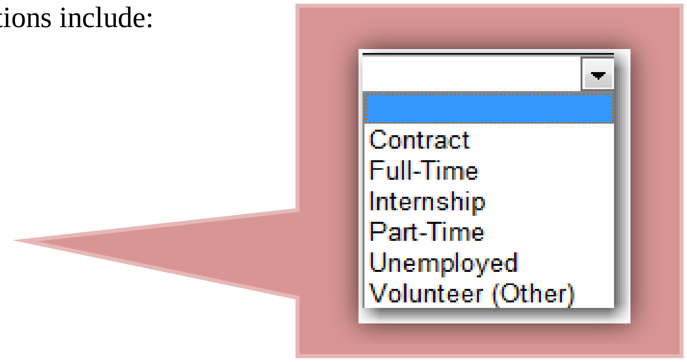
27. The last section on the Client Info page is the ***Employment Information*** section. This section focuses on the participant's employment status including: did the participant received a notice of layoff or separate from the military, is the participant looking for work, is the participant receiving unemployment compensation, is the participant a migrant seasonal farm worker, or is the participant a [i]disadvantaged worker.



Employment Information	Hide
* Current Employment Status	Unemployed
* Has this client recently received a notice of termination or layoff from job or received documentation in reference to separating from military service?	Yes No Unknown
Date of layoff or military separation:	
* Is this client currently looking for work?	Yes No Unknown
* Is this client receiving unemployment Insurance?	Yes No Unknown
* Migrant Seasonal Farm Worker	Yes No Unknown
* Disadvantaged Worker	Yes No Unknown
	Save ? Clear Changes ? Cancel ?

Remember, a red asterisk (*) next to a field means that the information in the field requires a response.

- **<u>Current Employment Status</u>** – this field requires the user to identify the customer's employment status. The options include:
    - Contract
    - Full-time
    - Internship
    - Part-time
    - Unemployed
    - Volunteer (Other)



- **<u>Notice of Layoff or Military Separation</u>** – this field asks if the participant has recently received a notice of termination or layoff from a job or received documentation in reference to separating from military services. This response options in this field are ***yes, no, or unknown.***

  If the response is "yes", the user should also enter the date the participant was either laid off or separated from military service using the date picker .

- **<u>Currently looking for work</u>** – the user must indicate whether or not the participant is looking for work. The response options are ***yes, no, or unknown***
- **<u>Receiving Unemployment Insurance</u>** – the user must indicate whether or not the participant is receiving Reemployment Assistance, previously known as Unemployment Insurance. The response options are yes, no, or unknown.
- **<u>Migrant Seasonal Farm Worker</u>** – the user must indicate whether or not the participant is a Migrant Seasonal Farm Worker. The response options are yes, no, or unknown.
- **<u>Disadvantaged Worker</u>** – the user must indicate whether or not the participant is a disadvantaged worker. The response options are ***yes, no, or unknown***.

[i] The term disadvantaged worker is used to describe individuals with varying obstacles that may make finding or obtaining employment more difficult than those who don't have the same obstacles or barriers. Someone without a high school diploma or lacks formal education can be considered disadvantaged.