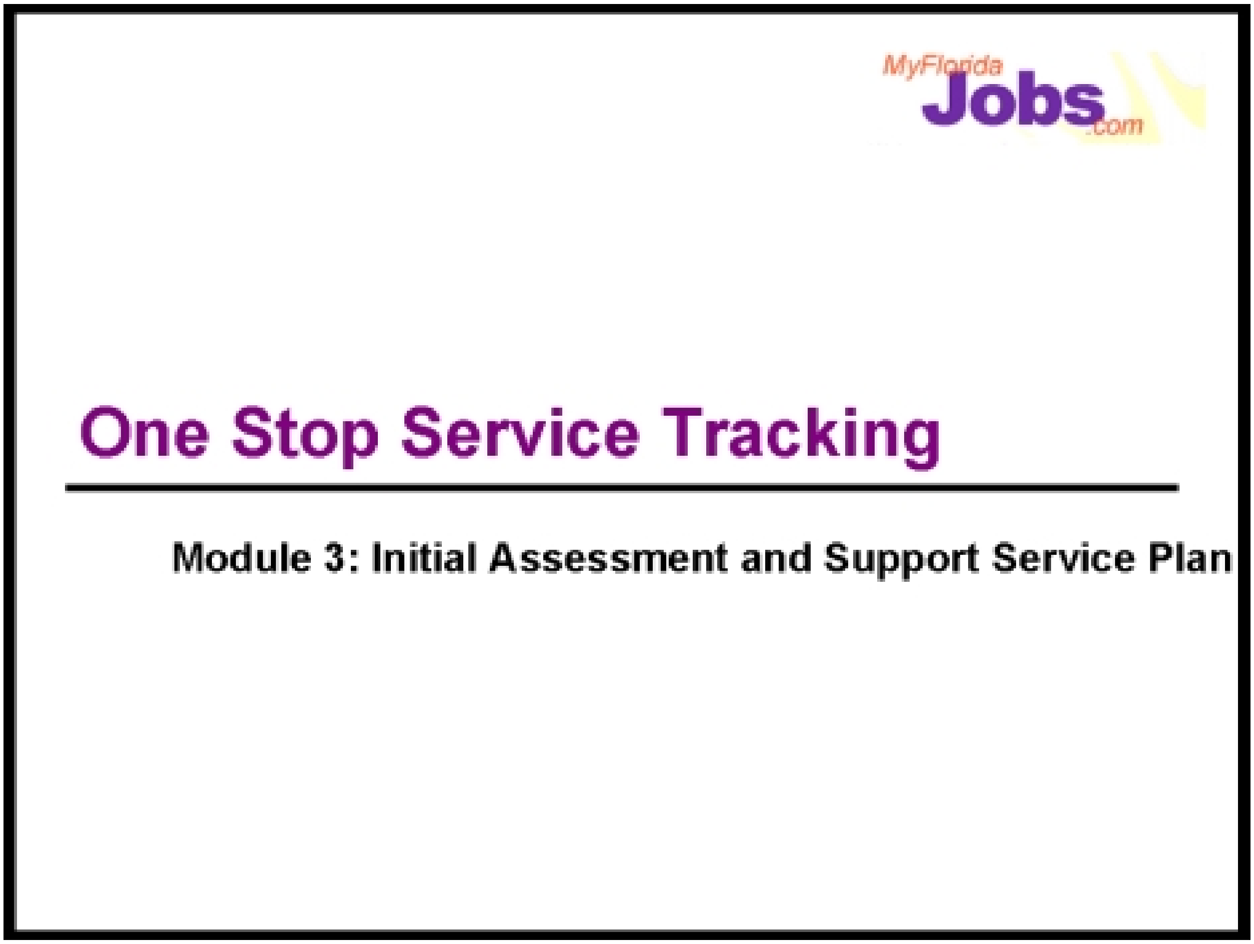
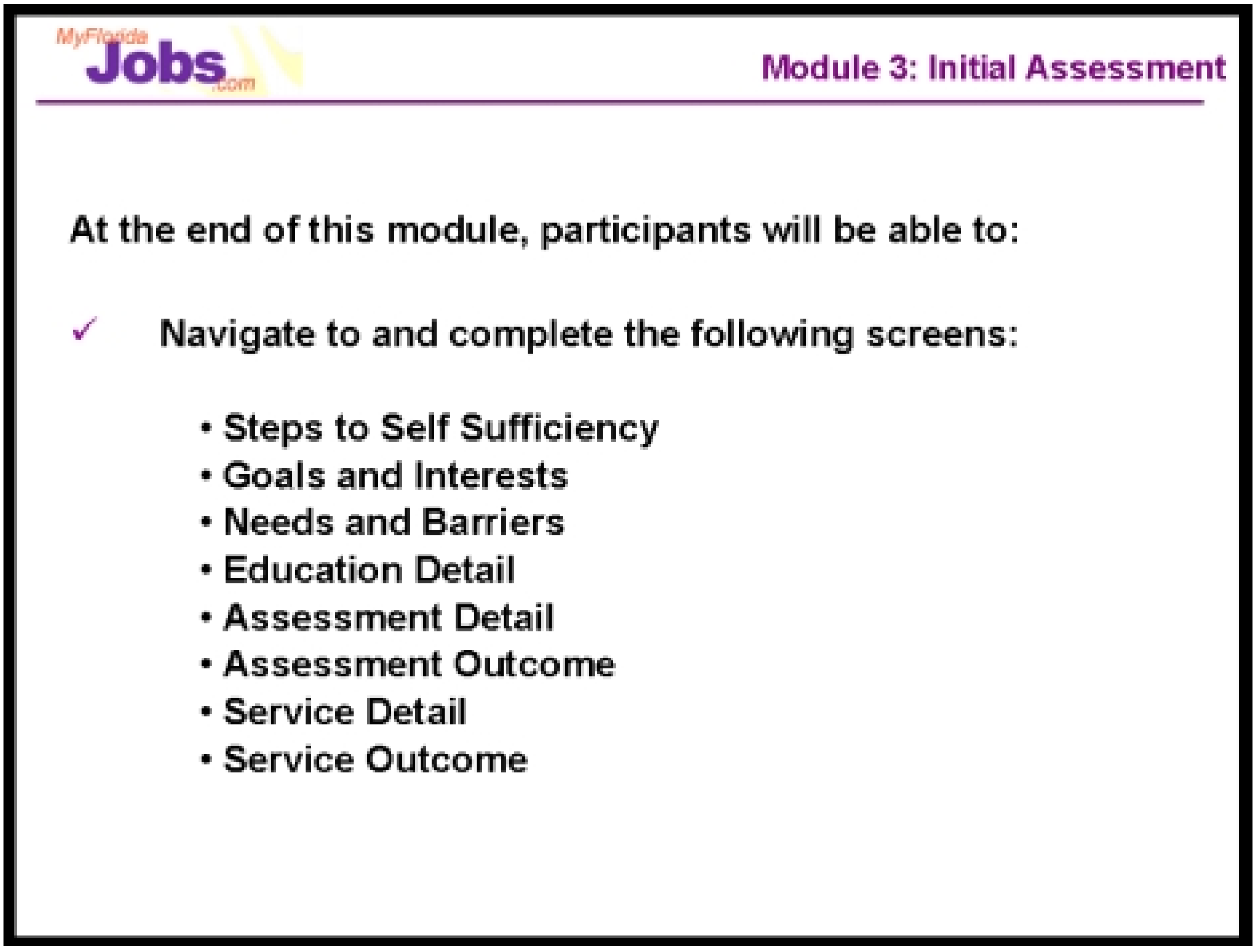


Introduction to Module 3: Initial Assessment and Support Service Plan

Now that we've practiced entering in a customer's background information, let's continue by going through the pages that will help us perform an initial assessment.



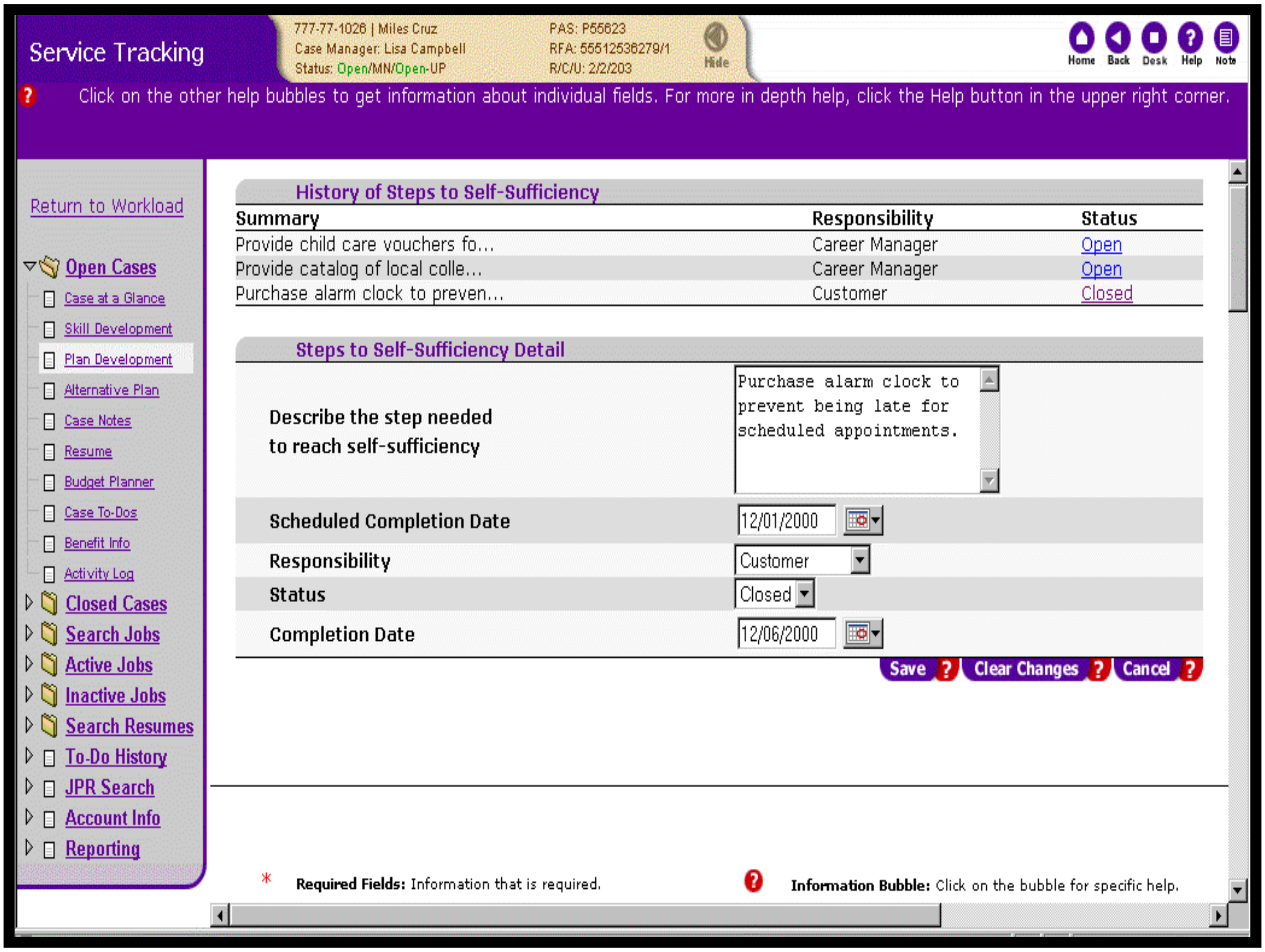
By initial assessment, we are referring to the pages that allow us to capture a customer's:

- Steps to Self Sufficiency
- Education Detail
- Goals and Interests
- Needs and Barriers

Additionally, we will go through pages that will be used to capture details for a customer's:

- Assessment tests
- Assessment test outcome
- Services
- Service outcomes

Let's start by taking a look at the Steps to Self Sufficiency.



Entering Steps to Self Sufficiency:

This page is used to capture the step by step actions that a customer and a career manager will be responsible for in order to help the customer become self-sufficient.

This page includes:

- An area for entering the details of a specific step
- A running history of all open and closed steps
- The ability to navigate to the detail for any of the listed steps

The data that is captured for each step includes:

- A description of the step
- The scheduled completion date
- Who is responsible to complete the step
- The status of the step
- The actual completion date (most likely to be entered at a later time)

Historically, these steps have been documented as part of creating the Individual Responsibility Plan. The Steps to Self Sufficiency is a function that can be used as a tool from the very beginning of a customer's case. As you gather information about a customer (through conversations, assessments, etc.), this is the place to document the step by step actions that the customer and career manager are responsible for completing.

This module also includes pages that capture a customer's Goals and Interests and a customer's Needs and Barriers. Understanding a customer's goals, interests, needs and barriers will give us an idea of what services, activities or training (those steps to self sufficiency) are appropriate for that customer.

Using this page as a way to organize the steps you are going to take will provide you with a list of the services and/or activities that you have to track in the system. These steps are included on the customer's Individual Responsibility Plan.

Associated Procedures: (Navigating from the Case Detail page)

CLICK the 'Plan Development' tab on the Case Detail

CLICK 'Add' on the Steps to Self-sufficiency tab

ENTER a description of the step

ENTER the scheduled completion date

SELECT whose responsibility it is to complete the step (Career Manager, Customer or Both)

SELECT the status of the step

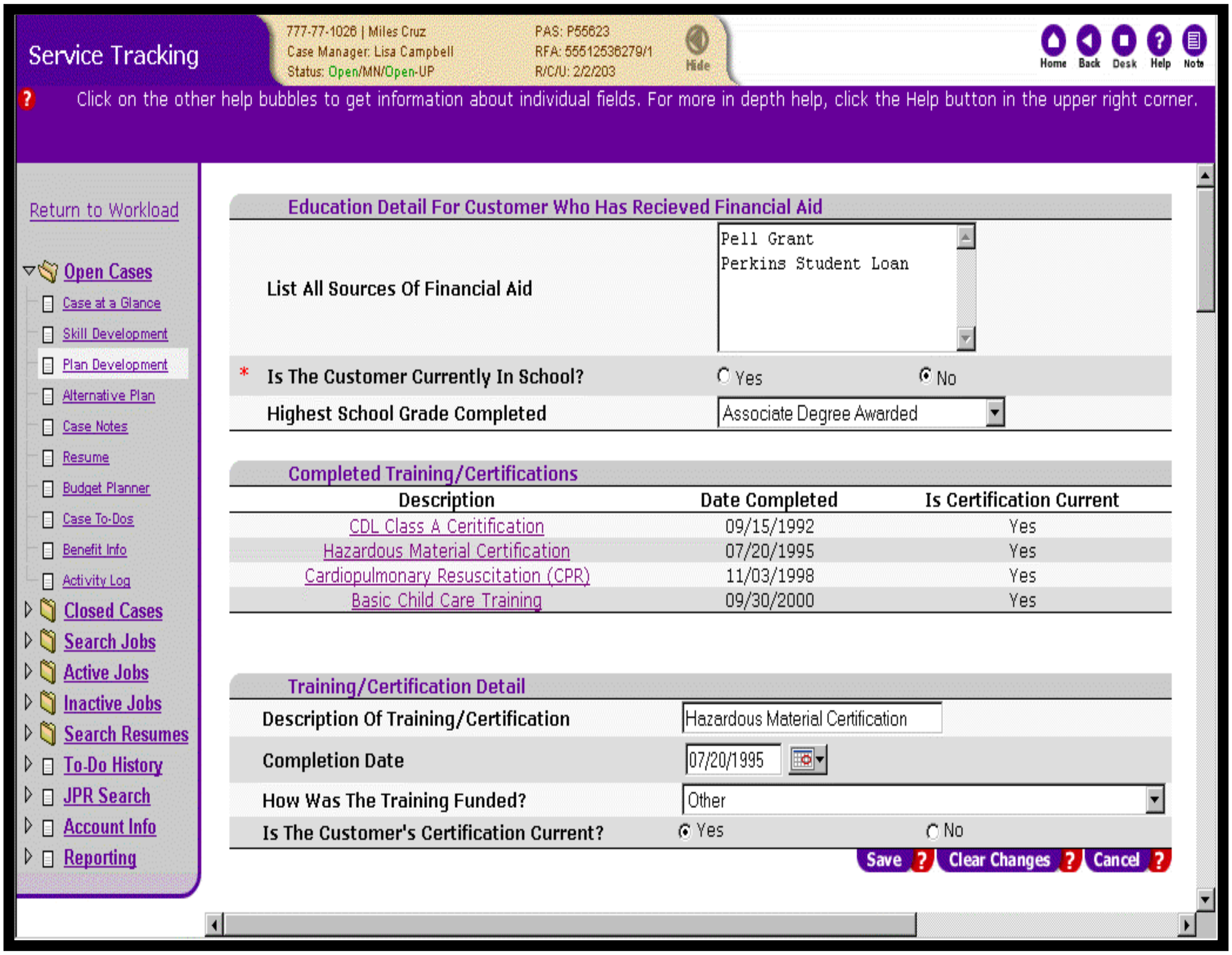
When this step to self-sufficiency has been closed, complete the following:

ENTER the actual completion date

CLICK 'Save' to update the information.

This step will now be listed as Closed in the History of Steps to Self-sufficiency.

CLICK 'Cancel' to return to the Case Detail screen.



Entering Education Information:

This page is used to capture information about the customer's educational background, including:

- If the customer has ever received financial aid
- If the customer is currently in school
- The customer's highest grade completed
- Any completed certifications/training to date

If the customer has previously received financial aid, you will be prompted to list all sources of financial aid received.

Associated Procedures (Navigating from the Case Detail)

I. Adding Education Detail

CLICK the 'Plan Development' tab on the Case Detail

CLICK the ‘Add’ or ‘Edit’ button under the Education Detail section to begin

CLICK the radio button that indicates whether the customer has ever received financial aid (if you indicate that the customer has received financial aid, then you must enter all their financial aid sources)

CLICK the radio button that indicates whether the customer is currently in school

SELECT the customer’s highest school grade completed from the drop down list

CLICK ‘Save’ to update

All completed training and certifications are listed in the Completed Training/Certifications table with the corresponding date of completion and certificate status.

<u>II. Adding Previous Training and Certifications</u>

CLICK the ‘Add’ or ‘Edit’ button under the Education Detail section to begin

ENTER a description of the training or certification that was completed

ENTER the date that the training or certification was completed

SELECT the funding source for the training or certification from the drop down list

CLICK the radio button to indicate if the customer’s certification is current

CLICK ‘Save’ to update the customer’s history of training and certifications

Should the certification expire, simply complete the following steps

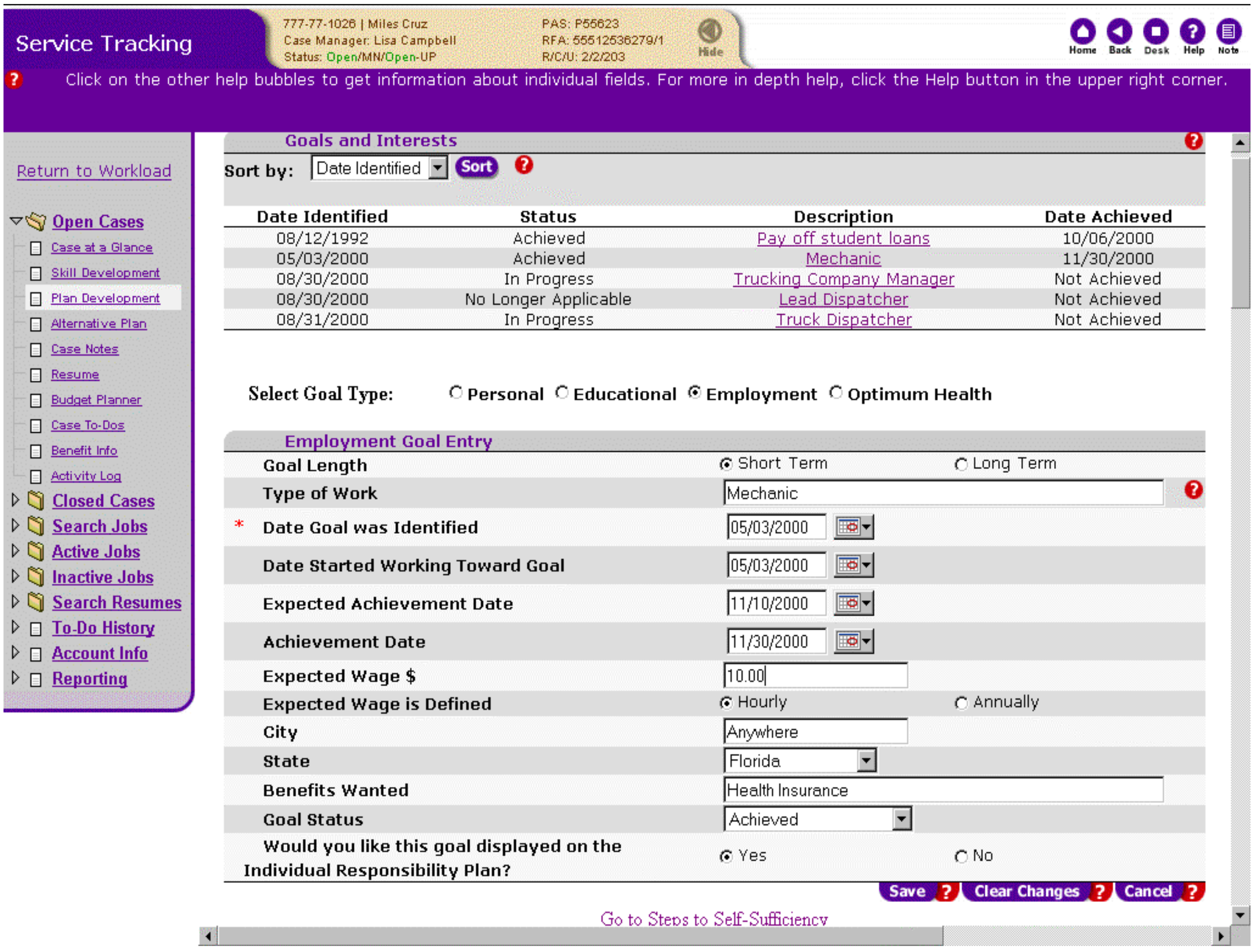
<u>III. Editing Existing Training and Certifications</u>

CLICK the hyperlink for the appropriate description

CLICK the radio button to indicate if the customer’s certification is no longer current

CLICK ‘Save’ to update the customer’s history of training and certifications

CLICK ‘Cancel’ to return to the Case Detail screen.



Entering Goals and Interests:

This page is used to capture a customer's personal, educational, employment and optimum health goals.

This page includes:

- An area for entering the details of a specific goal
- A running history of all goals
- The ability to navigate to the detail for any of the listed goals

The data that is captured for each goal varies depending on the type of goal it is. As an example, the data captured for an employment goal includes:

- Goal length
- Goal description
- The date the goal was identified (will default to current date)
- The date the customer started working towards the goal
- The expected achievement date
- The actual achievement date (most likely to be entered at a later time)

- The goal status
- Whether or not the goal should be displayed on the Individual Responsibility Plan

Associated Procedures: (Navigating from the Case Detail)

I. Entering Personal, Educational and Optimum Health Goal Detail

CLICK the ‘Plan Development’ tab on the Case Detail

CLICK ‘Add’ on the Goals and Interests tab to begin

CLICK the ‘Select Goal Type’ radio button that best describes the type of goal the customer wants to achieve

CLICK the radio button to indicate whether this is a short term or long term goal

ENTER a description of the goal

ENTER the date the goal was identified (the system defaults to the current date, but you can overwrite this if appropriate)

ENTER the date that the customer started working toward the goal

ENTER the expected achievement date

SELECT the appropriate goal status for the goal

CLICK ‘Save’ to add the goal to the customer’s running list of goals (at the top of the page)

CLICK ‘Cancel’ to return to the Case Detail screen.

II. Entering Employment Goal Detail

CLICK ‘Add’ on the Goals and Interests tab to begin

CLICK the ‘Employment’ radio button

CLICK the radio button to indicate whether this is a short term or long term goal

ENTER a description of the employment goal (type of work)

ENTER the date the goal was identified (the system defaults to the current date, but you can overwrite this if appropriate)

ENTER the date that the customer started working toward the goal

ENTER the expected achievement date

ENTER the expected wage and indicate whether this is an hourly figure or an annual figure

ENTER the city where the customer would like to be employed

SELECT the state where the customer would like to be employed

ENTER a description of the benefits wanted (e.g., medical, dental, life insurance, child care)

SELECT the appropriate goal status for the goal

The radio button indicates that this goal should display on the Individual Responsibility Plan (defaulted to 'Yes')

CLICK 'Save' to add the goal to the customer's running list of goals (at the top of the page)

CLICK 'Cancel' to return to the Case Detail screen.

<u>III. Editing Goal Detail</u>

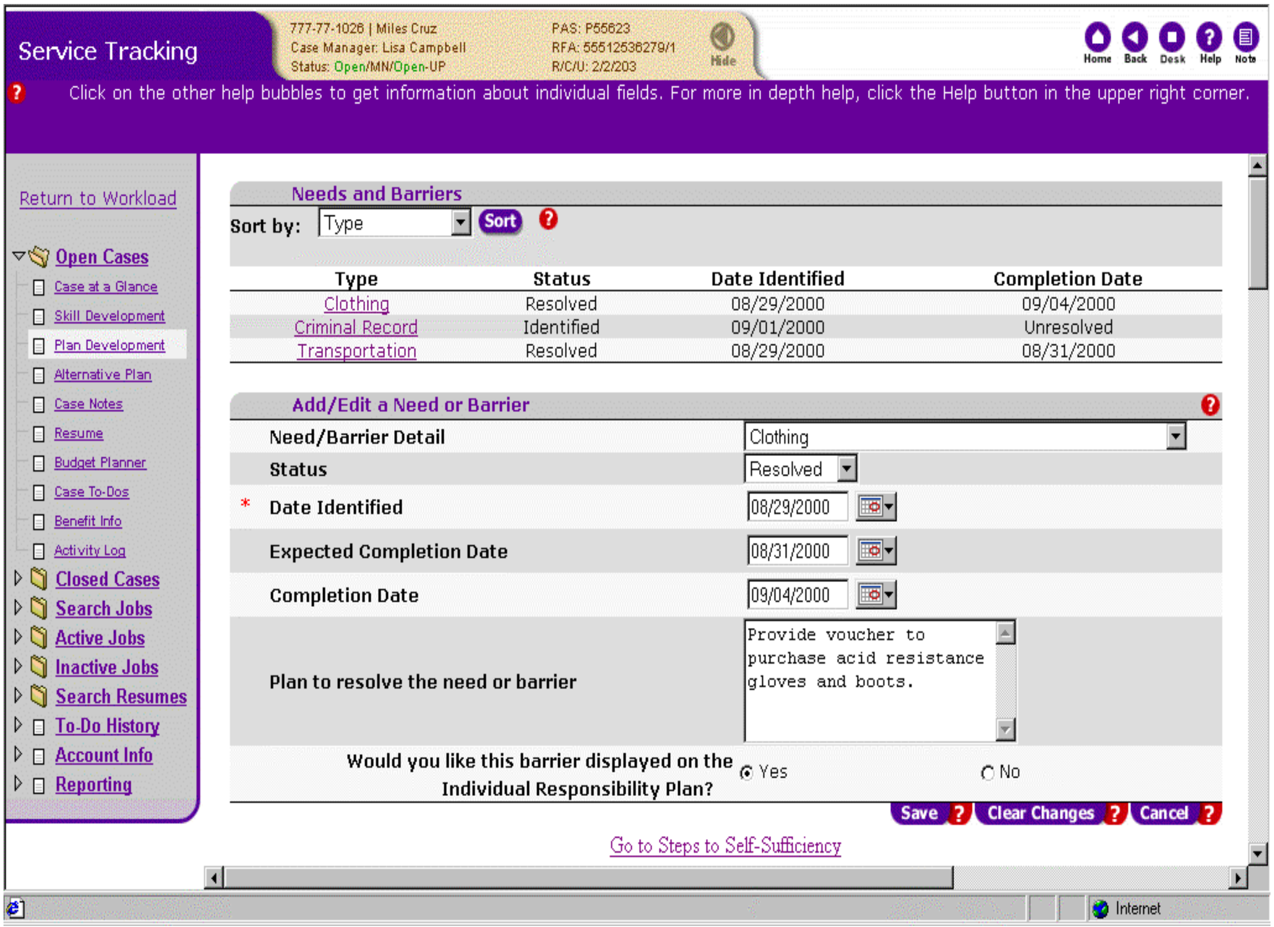
CLICK 'Add' on the Goals and Interests tab to begin

FROM THE GOALS AND INTERESTS LIST, CLICK the goal that you would like to edit (CLICK on the associated blue hyperlink under the 'Description' column- the detail for that particular goal is viewable in the 'Entry' portion of the page)

CLICK 'Cancel' to return to the Case Detail screen.

Helpful Tips:

Tip 1: A useful function on this page is the ability to link directly to the Steps to Self Sufficiency. As goals are identified, and while it is fresh in your mind, use this link to document the steps that the customer will have to take in order to minimize or eliminate any barriers which may exist which would cause these goals to not be achieved.



Entering Needs and Barriers:

This page is used to capture a customer's needs and barriers to self-sufficiency.

This page includes:

- An area for entering the details of a specific need or barrier
- A running history of all identified needs and barriers
- The ability to navigate to the detail for any of the listed needs and barriers

The data that is captured for each need or barrier includes:

- A description of the need/barrier
- The status of the need/barrier
- The date that the need/barrier was identified (defaults to current date)
- The expected resolution date
- A description of the approach to resolving the need/barrier
- Whether or not the need/barrier should be displayed on the Individual Responsibility Plan

Associated Procedures:

I. Entering Need/Barrier Detail

CLICK ‘Plan Development’ tab on the Case Detail

CLICK ‘Add’ on the Needs and Barriers tab to begin

SELECT a description of the need/barrier from the drop down list

SELECT the status of the need/barrier

ENTER the date the need/barrier was identified (the system defaults to the current date, but you can overwrite this if appropriate)

ENTER the expected completion date

ENTER the completion date (when known)

ENTER a description of how you and the customer will work to resolve this need/barrier

The radio button indicates that this need/barrier should display on the Individual Responsibility Plan (defaulted to ‘Yes’)

CLICK ‘Save’ to add the barrier to the customer’s running list of needs/barriers (at the top of the page)

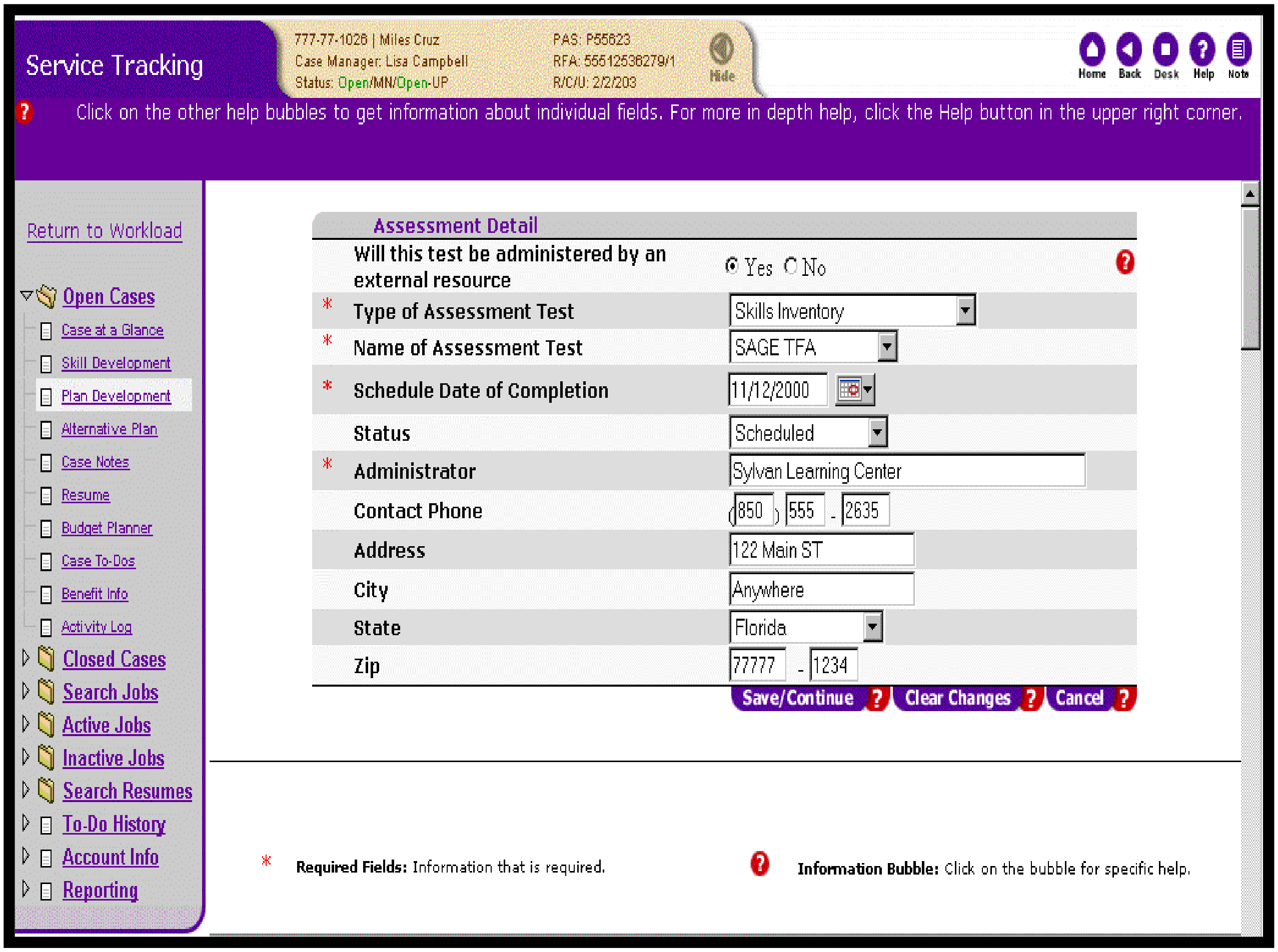
CLICK ‘Cancel’ to return to the Case Detail screen
II. Editing Need/Barrier Detail

CLICK ‘Add’ on the Needs and Barriers tab to begin

FROM THE NEEDS AND BARRIERS LIST, CLICK the need/barrier that you would like to edit (CLICK on the associated blue hyperlink under the ‘Type’ column- the detail for that particular need/barrier is viewable in the ‘Entry’ portion of the page)

Helpful Tips:

Tip 1: A useful function on this page is the ability to link directly to the Steps to Self Sufficiency. As needs/barriers are identified, and while it is fresh in your mind, use that link to document the steps that the customer will have to take in order to minimize or eliminate his/her barrier.



Scheduling a customer Assessment Test:

This page is used to track the details associated with scheduling an assessment test for a customer. This page "builds on itself" in order to lead the user through entering the required details. For example, the first question you are presented with is whether or not the assessment is being administered by an external resource. The fields that you see next will depend on how you answer this initial question.

The data captured on this page includes:

- Whether or not this test will be administered by an external resource
- The type of assessment
- The name of the assessment
- The scheduled date for completion
- The status

If the assessment is administered externally, the following information is also captured:

- The test administrator's name
- The administrator's phone number
- The administrator's address, city, state and zip

Later in this module, we will discuss "Assessment Outcomes." OSST includes specific templates designed to capture scores for specific assessment tests. Once a customer completes an assessment, the career manager has the ability to link to this score template to input the customer's scores. The template that the career manager sees is based on the assessment "name" that was originally entered as part of the Assessment Detail.

Associated To Dos:

- A Career Manager To Do will be generated on the day of the scheduled assessment as a reminder that the customer should be taking the scheduled assessment

Associated Procedures: (Navigating from the Case Detail)

<u>I. Entering Assessment Detail for an Internal Administrator</u>

CLICK the 'Plan Development' tab on Case Detail

CLICK 'Add' on the Assessments tab to begin

CLICK 'No' to indicate that the test will not be administered by an external resource (external resource means a provider other than the One Stop location)

SELECT the Type of Assessment from the drop down box (e.g., Skills Inventory)

SELECT the Name of the Assessment from the drop down box (e.g., SAGE TFA)

ENTER the scheduled date of completion for the assessment test

SELECT the status of the Assessment from the drop down box

CLICK 'Save/Continue'

<u>II. Entering Assessment Detail for an External Administrator</u>

CLICK 'Add' on the Assessments tab to begin

CLICK 'Yes' to indicate that the test will be administered by an external resource (external resource means a provider other than the One Stop location)

SELECT the Type of Assessment from the drop down box (e.g., Skills Inventory)

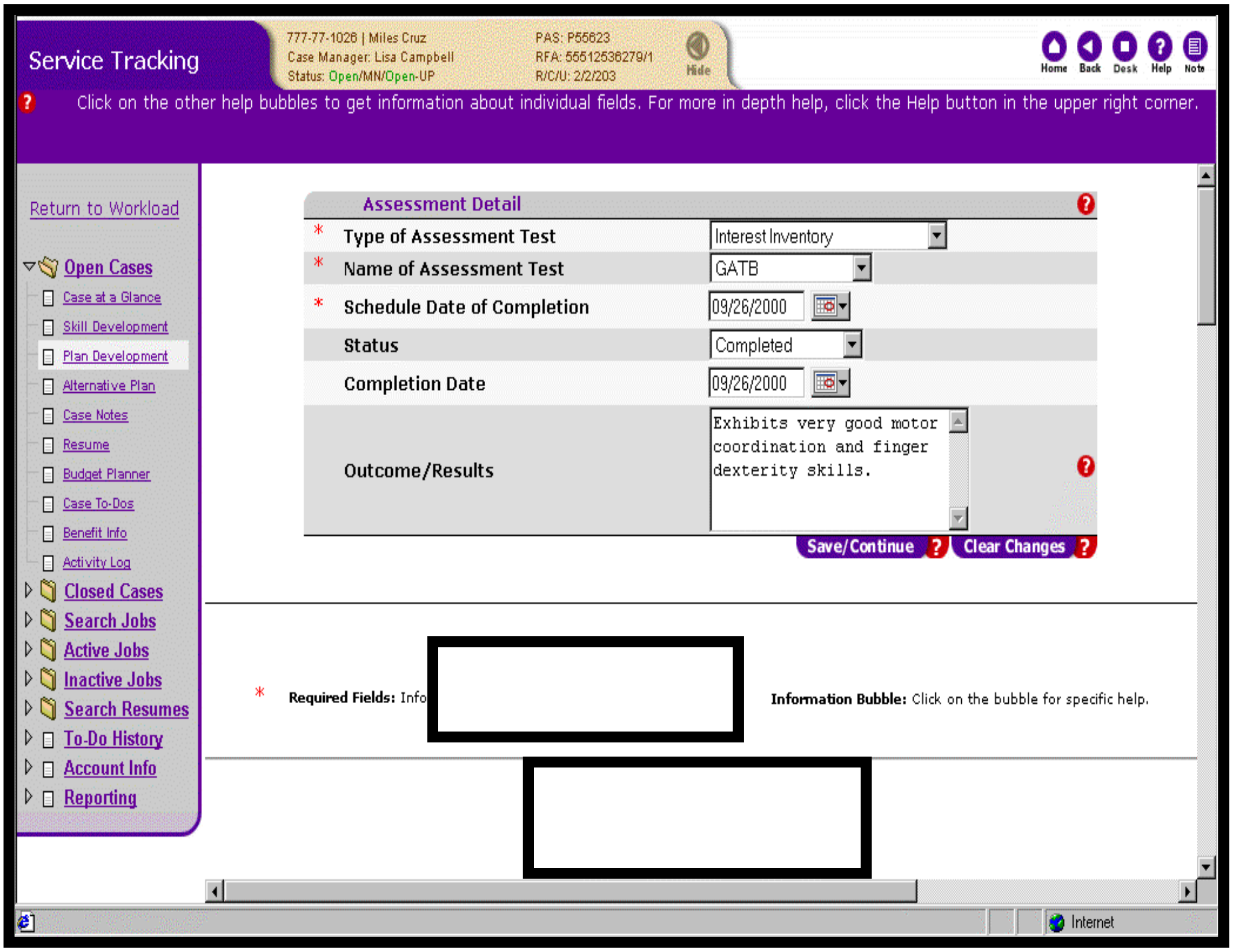
SELECT the Name of the Assessment from the drop down box (e.g., SAGE TFA)

ENTER the scheduled date of completion for the assessment test

SELECT the status of the Assessment

ENTER the administrator's information (name, phone number, address, city, state, zip)

CLICK 'Save/Continue'



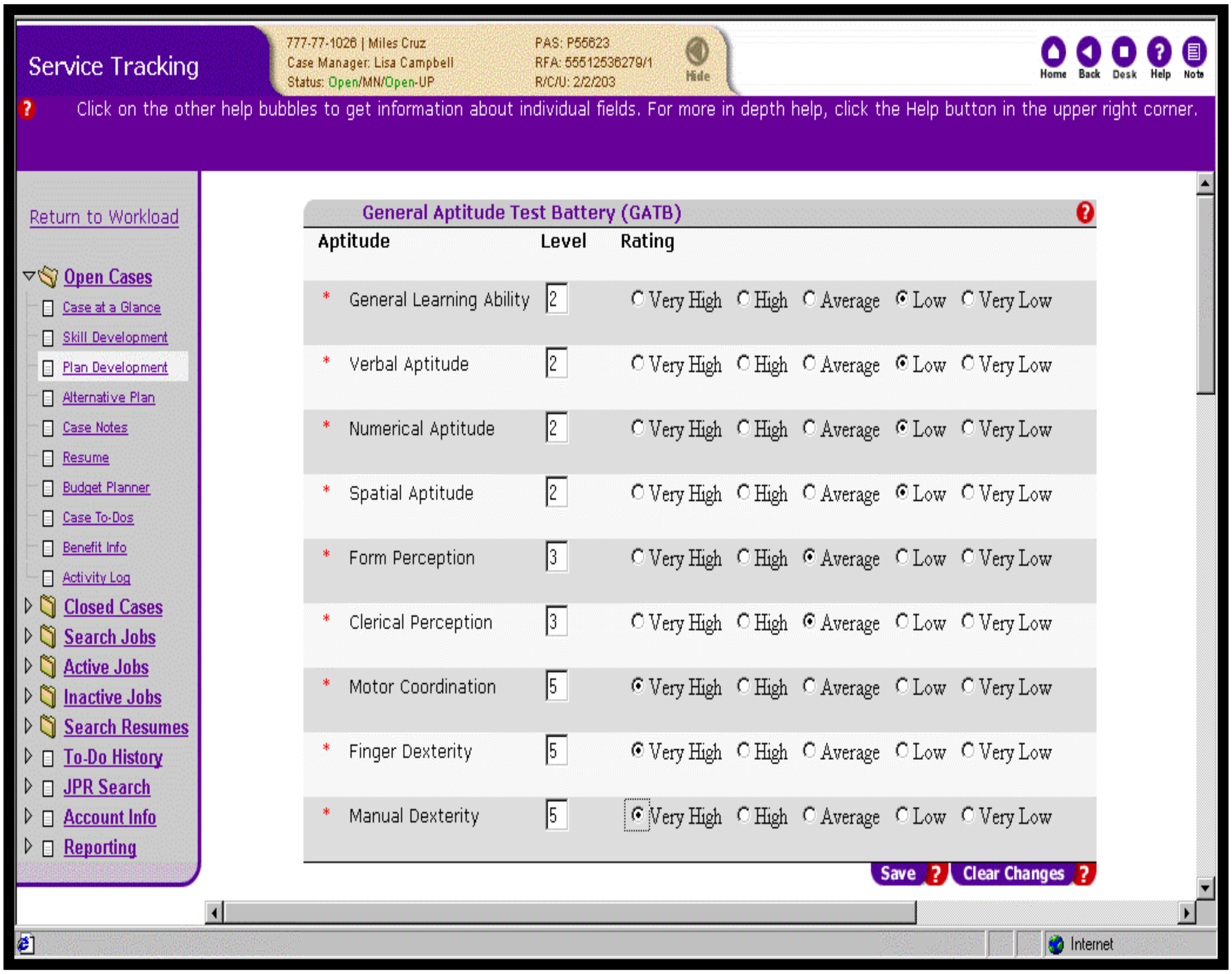
Entering Assessment Outcomes:

This page is used to track the outcomes associated with a specific assessment test. There are four templates in the system. They were built for the most commonly used assessment tests in the state of Florida. These templates are as follows:

- GATB
- SAGE TFA
- SDS Form 'E'
- TABE

There is also an "Other" template that should be used if an assessment other than these four are administered.

The data captured on this page is based on the assessment given. Let's take a look at each of the templates.



Entering the Assessment Outcome for the GATB

Associated Procedures: (Navigating from the Case Detail)

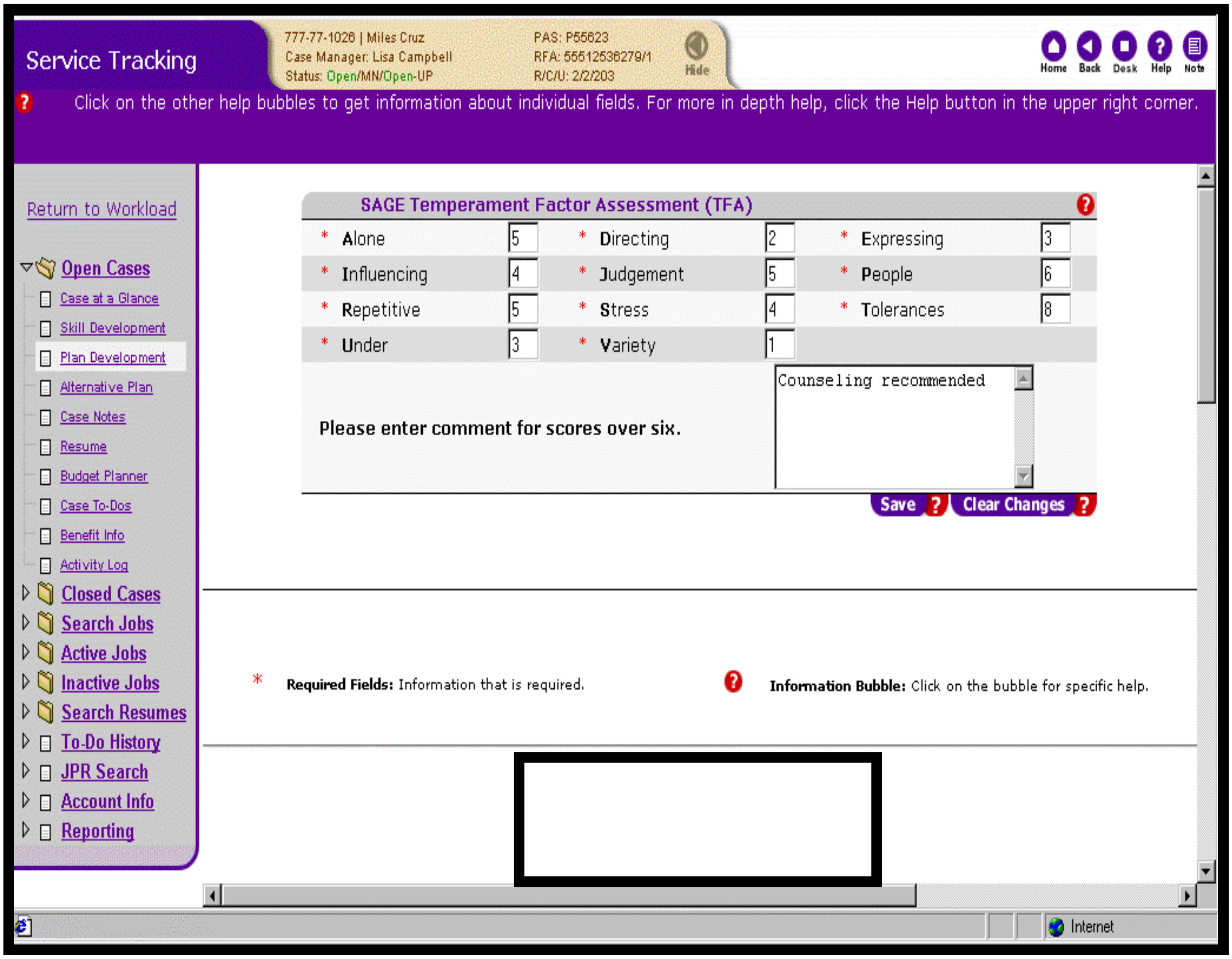
CLICK the appropriate hyperlink under the Test Detail column

SELECT a status of 'Complete' from the status drop down list

ENTER any comments you may have regarding the customer's assessment in the Outcome/Results area (this is not the area to enter the scores though- that will come next)

ENTER the date that the assessment was completed

CLICK 'Save/Continue' (this takes you to the Outcomes template where the scores should be entered)



Entering the Assessment Outcome for the SAGE TFA

Associated Procedures: (Navigating from the Case Detail)

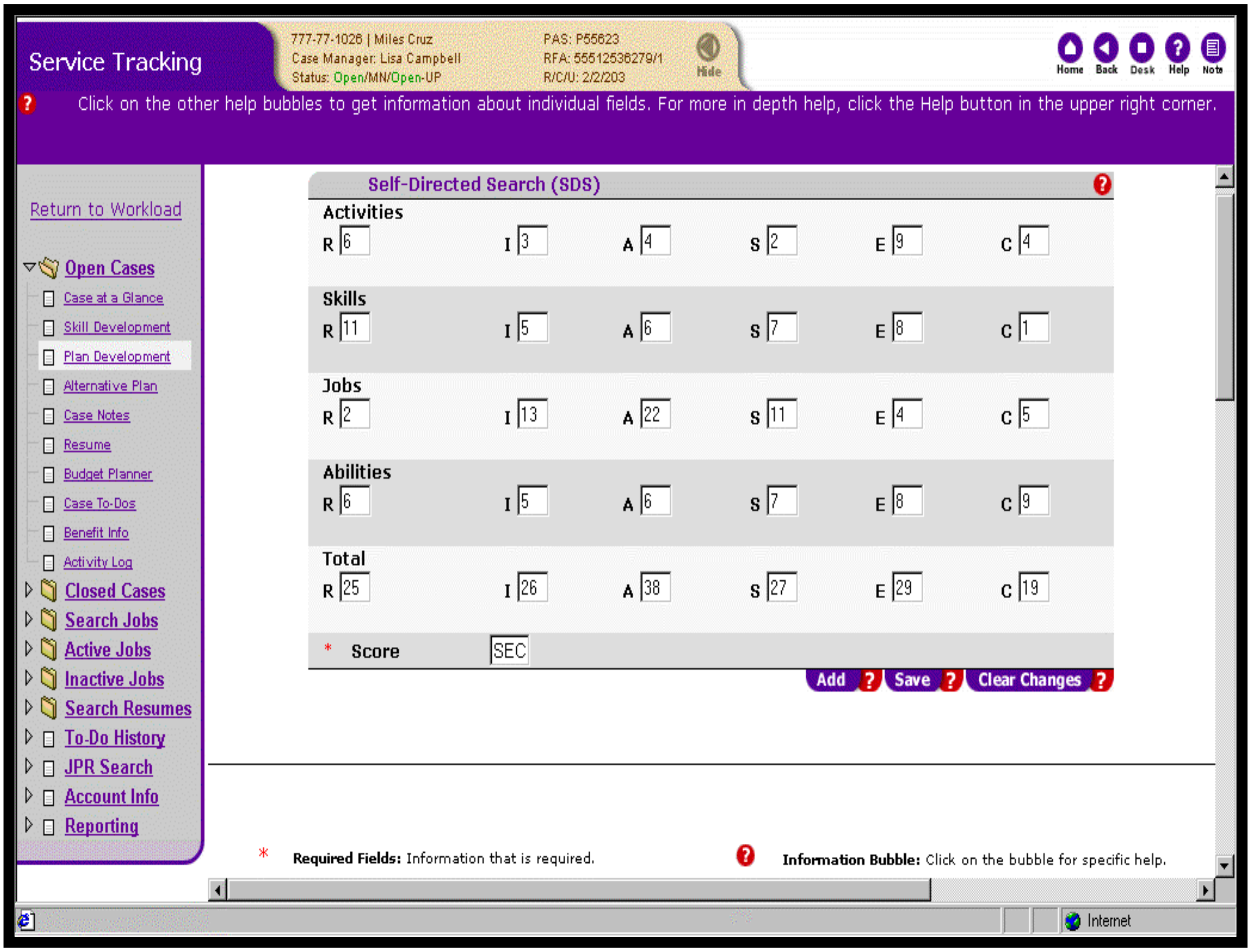
CLICK the appropriate hyperlink for under the Test Detail column

SELECT a status of 'Complete' from the status drop down list

ENTER any comments you may have regarding the customer's assessment in the Outcome/Results area (this is not the area to enter the scores though- that will come next)

ENTER the date that the assessment was completed

CLICK 'Save/Continue' (this takes you to the Outcomes template where the scores should be entered)



Entering the Assessment Outcome for the SDS Form ‘E’

Associated Procedures: (Navigating from the Case Detail)

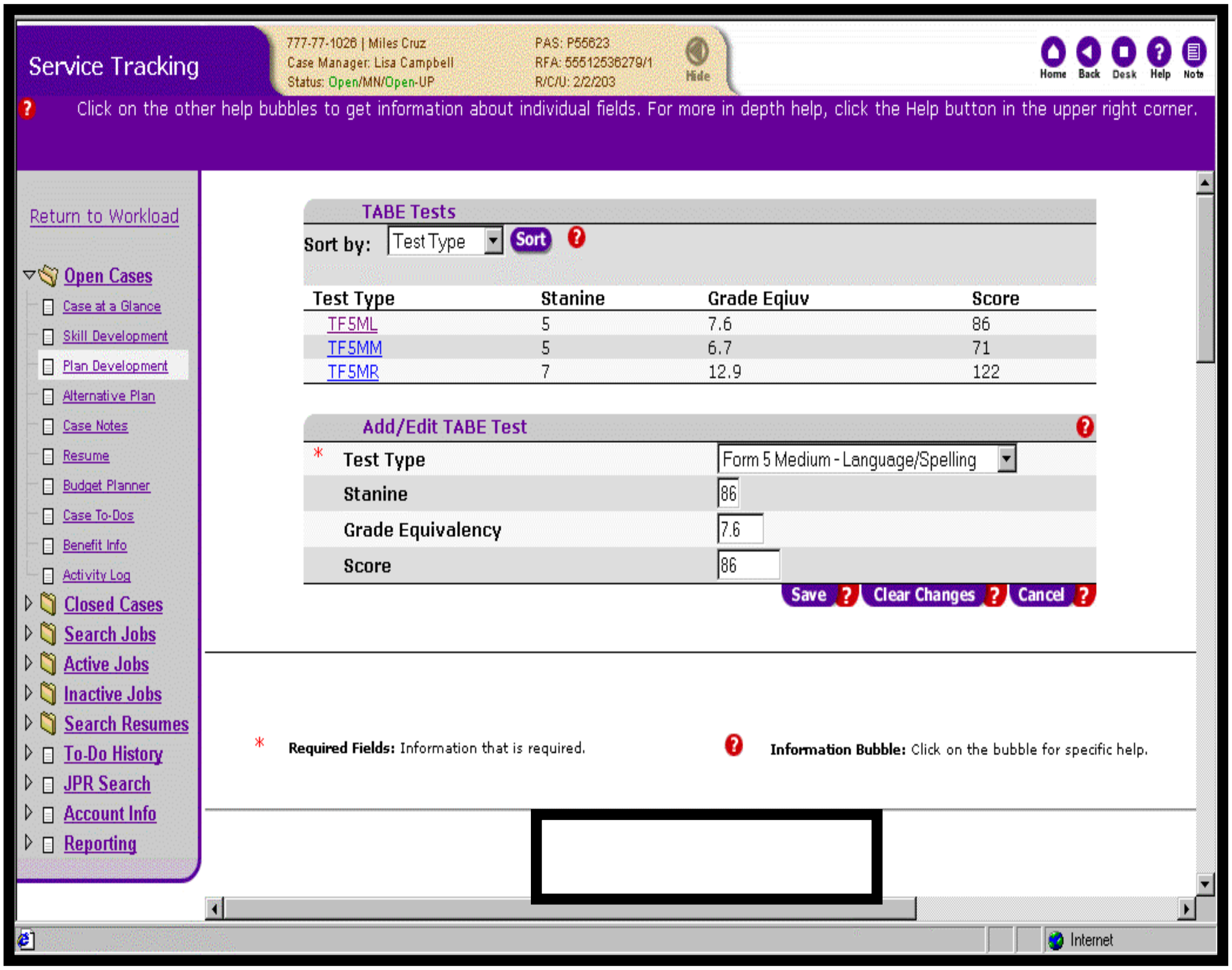
CLICK the appropriate hyperlink under the Test Detail column

SELECT a status of ‘Complete’ from the status drop down list

ENTER any general comments you may have regarding the customer’s assessment in the Outcome/Results area (this is not the area to enter the scores)

ENTER the date that the assessment was completed

CLICK ‘Save/Continue’ (this takes you to the Outcomes template where the scores should be entered)



Entering the Assessment Outcome for the TABE

Associated Procedures: (Navigating from the Case Detail)

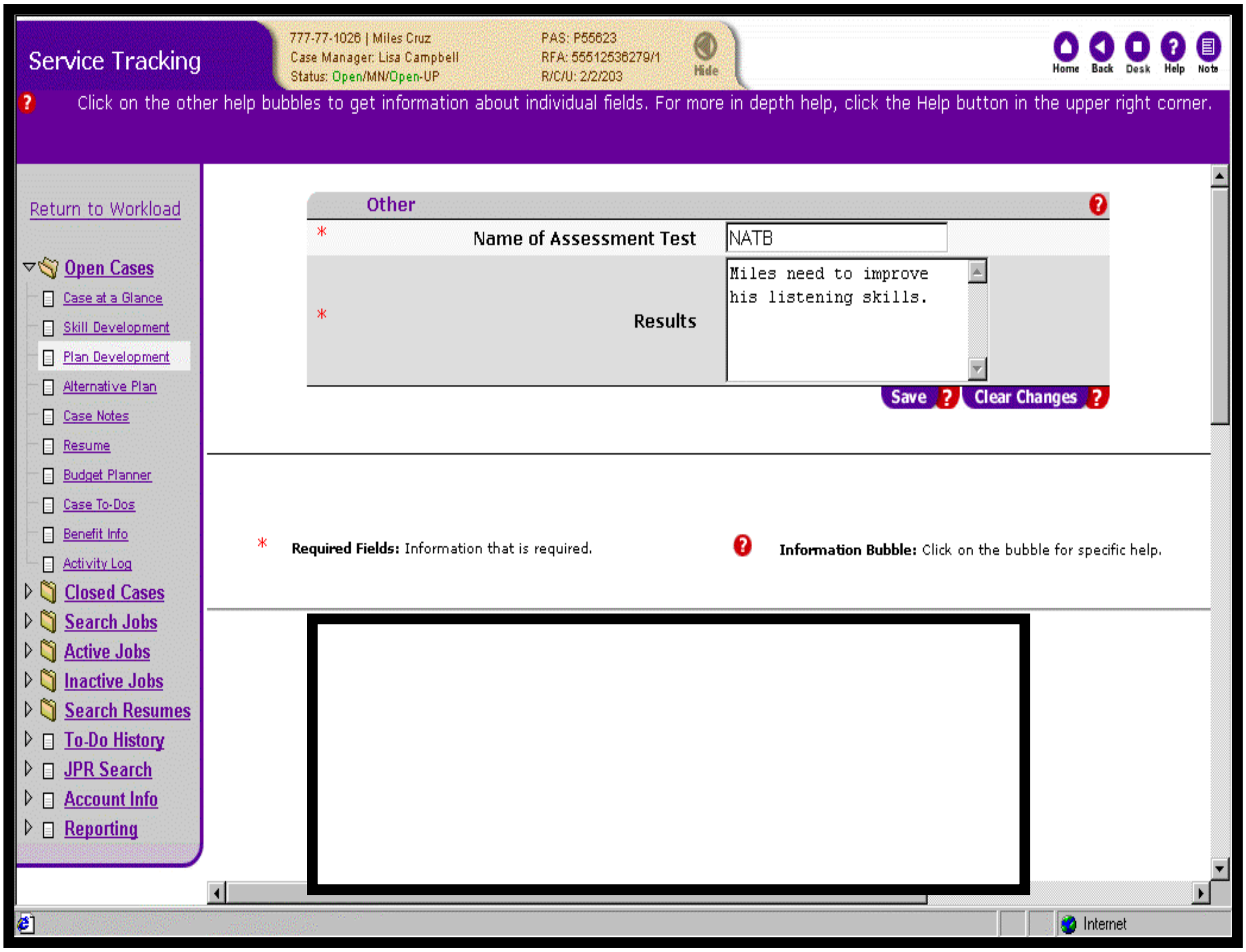
CLICK the appropriate hyperlink under the Test Detail column

SELECT a status of 'Complete' from the status drop down list

ENTER any comments you may have regarding the customer's assessment in the Outcome/Results area (this is not the area to enter the scores)

ENTER the date that the assessment was completed

CLICK 'Save/Continue' (this takes you to the Outcomes template where the scores should be entered)



Using the “Other” template to enter Assessment Outcome

Associated Procedures: (Navigating from the Case Detail)

CLICK the appropriate hyperlink under the Test Detail column

SELECT a status of ‘Complete’ from the status drop down list

ENTER any comments you may have regarding the customer’s assessment in the Outcome/Results area (this is not the area to enter the scores)

ENTER the date that the assessment was completed

CLICK ‘Save/Continue’ (this takes you to the Outcomes template where the scores should be entered)

MyFlorida Jobs.com **Tracking Services, Training, Activities and Employment**

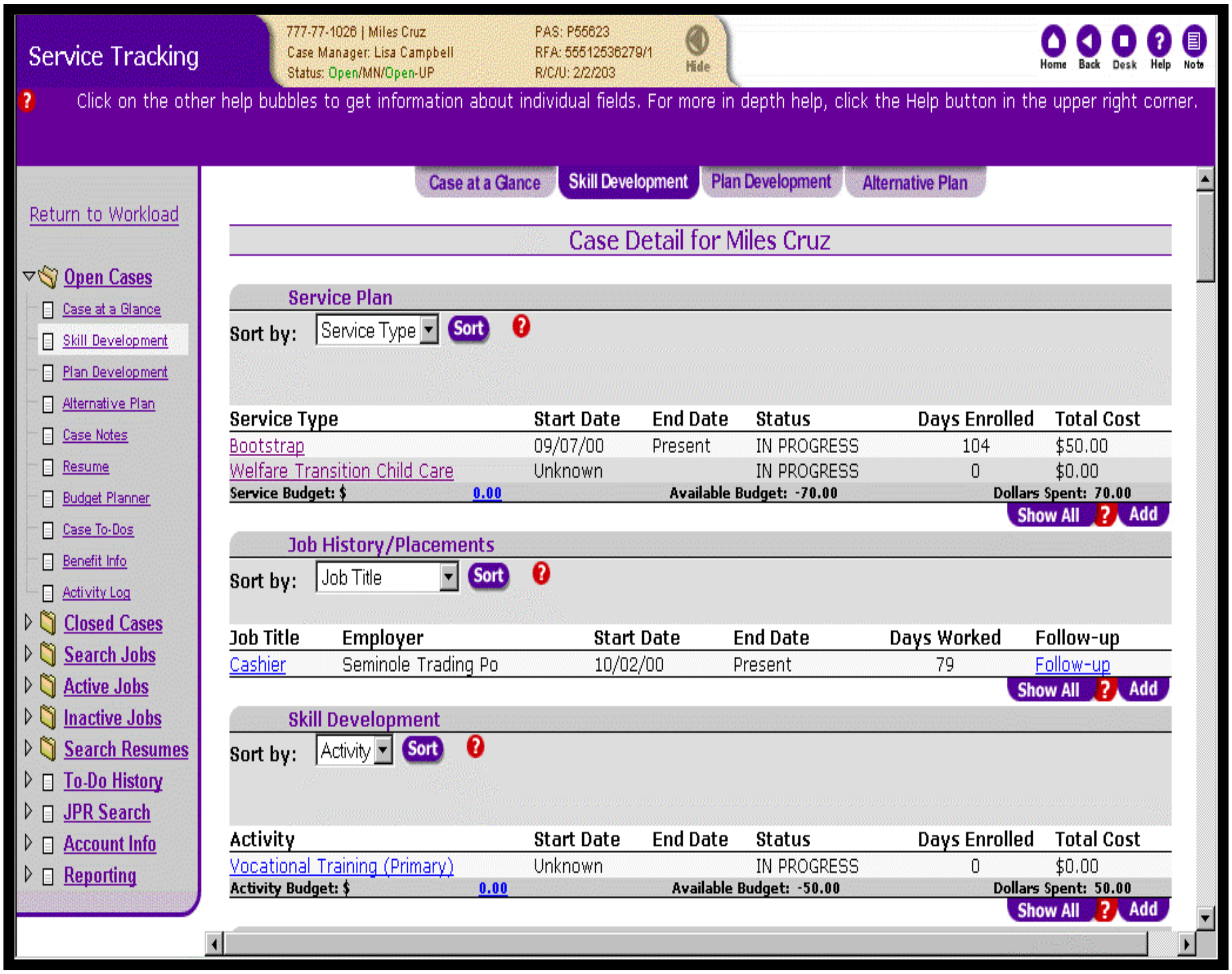
WAGES MIS	**OSST**
• With the exception of child care, all are tracked on the SVC screen	• Separate screens to capture and summarize each type of information
• Not a clear delineation between services, training, activities and employment	• Clear delineation between services, training, activities and employment

Tracking Services, Training, Activities and Employment

Before we move on to tracking customer services, it's important to understand how tracking services, training, activities and employment in WAGES MIS is different from tracking services, training, activities and employment in OSST.

OSST has an area for Supportive Services, an area for Skill Development (includes Training and Activities) and an area for Placements (employment). You are able to navigate to tabs for each of these areas on the Case Detail.

The reason behind the distinction between services, training, activities and employment is to "call things what they are." For example, penalties are no longer something that is tracked on the Services page. Instead, penalties have its own tab on the Case Detail under the 'Alternative Plans' tab.



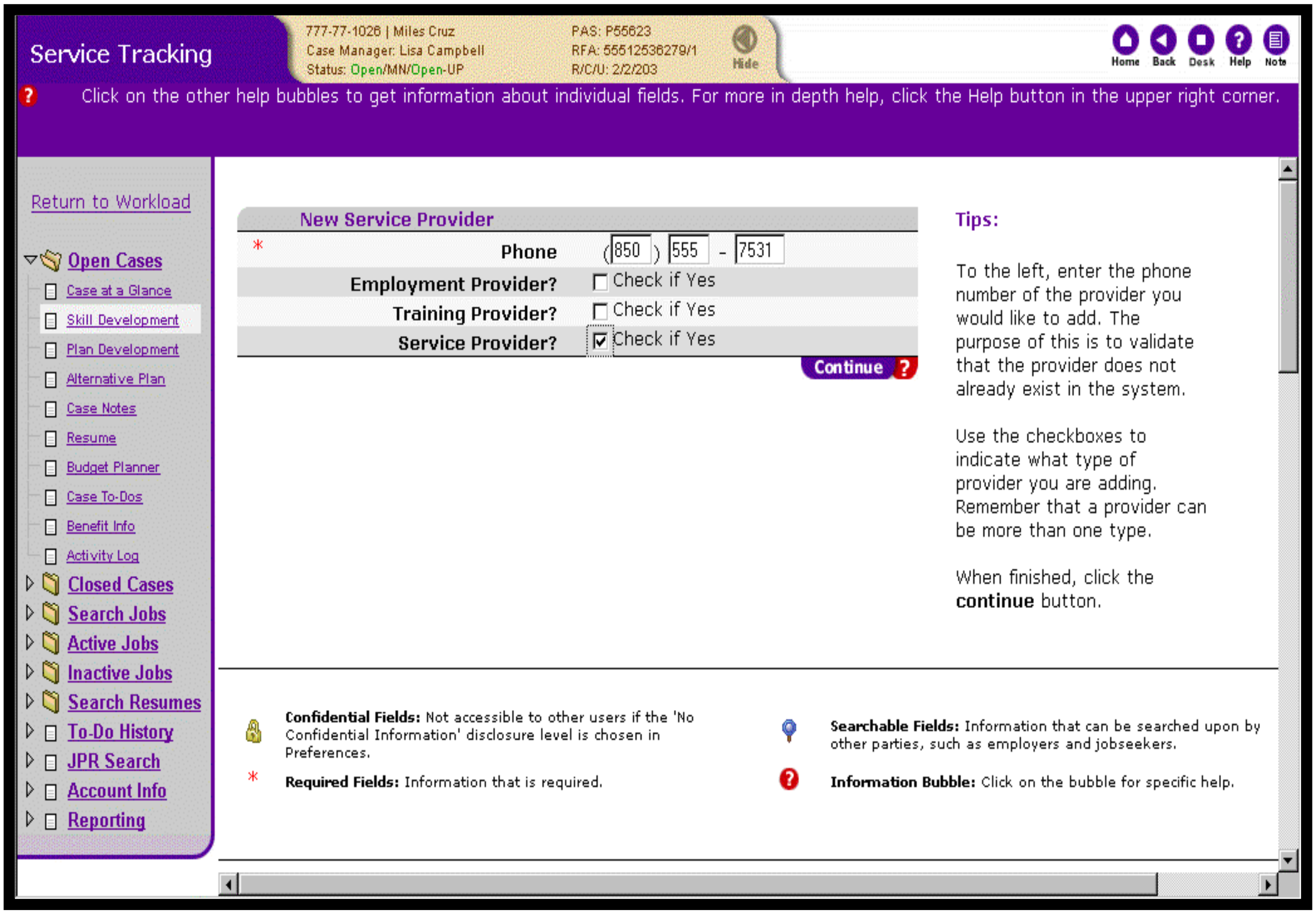
Using the Services Pages:

The Service Plan provides you with a starting point to do several things, including:

- Adding a Service budget amount for a customer
- Adding a new service provider
- Searching for a service provider (and sort your search results)
- Recording an outcome for a service

The next series of pages will take you through the procedures of how to perform each of these actions. Once services have been added to the customer's case, the Service Plan provides a view of the customer's service history (in progress and completed), including:

- The service type
- The start date of the service
- The end date of the service
- The status of the service
- The number of days enrolled in the service
- The total cost of the service



Adding a Provider

Associated Procedures: (Navigating from the Case Detail)

<u>I. Add a Provider</u>

CLICK the ‘Skill Development’ tab on the Case Detail

CLICK ‘Add’ on the Service Plan tab to begin

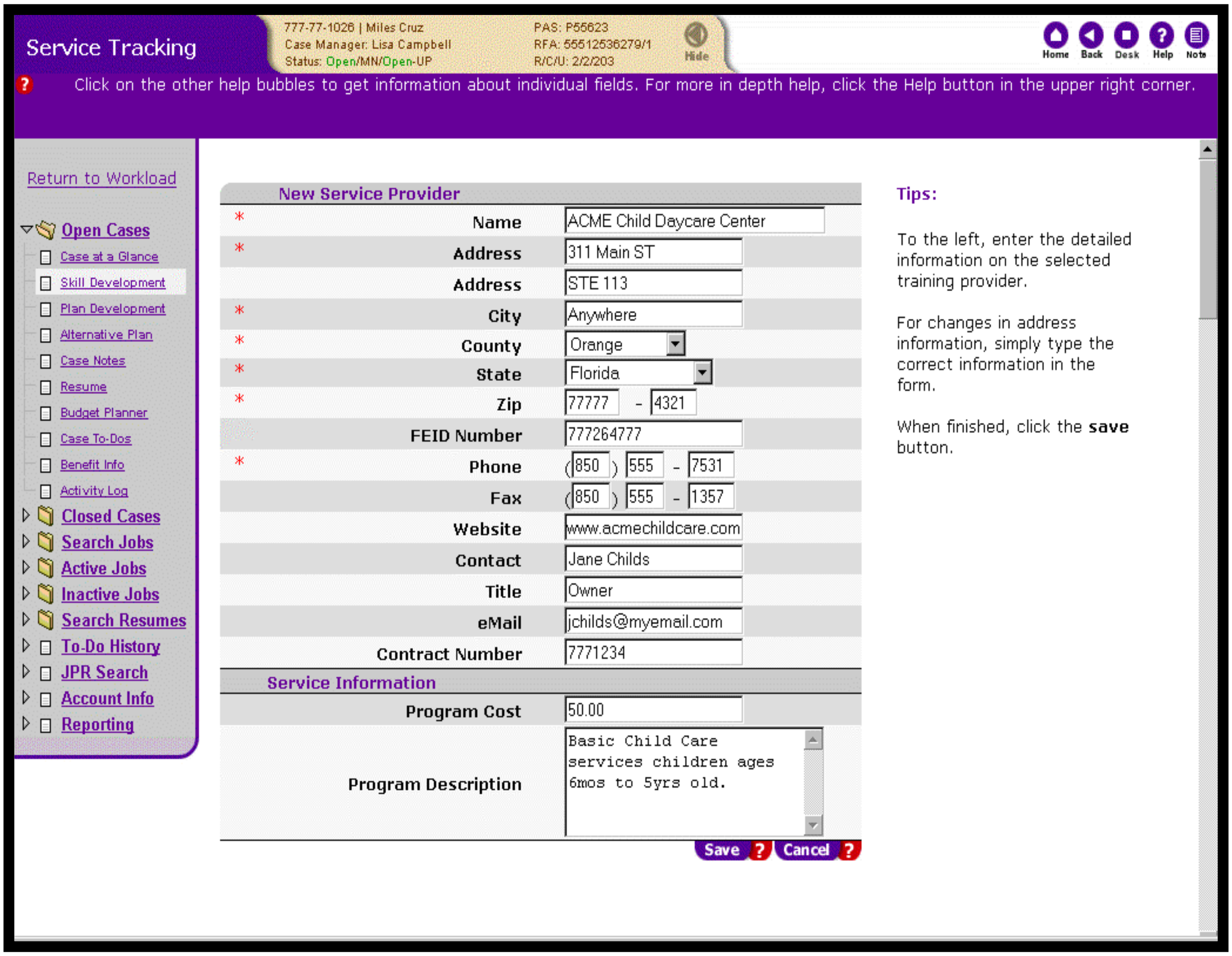
CLICK the ‘search’ tab to locate a provider

CLICK the ‘Add Provider’ tab located at the bottom of the search results on the ‘Provider Search’ results page.

ENTER the provider’s phone number

CLICK the check box to indicate the addition of a ‘Service Provider’ (This action performs a check within the database to ensure that this provider isn’t already listed)

CLICK ‘Continue’



ENTER the provider's name

ENTER the provider's address (city, county, state and zip)

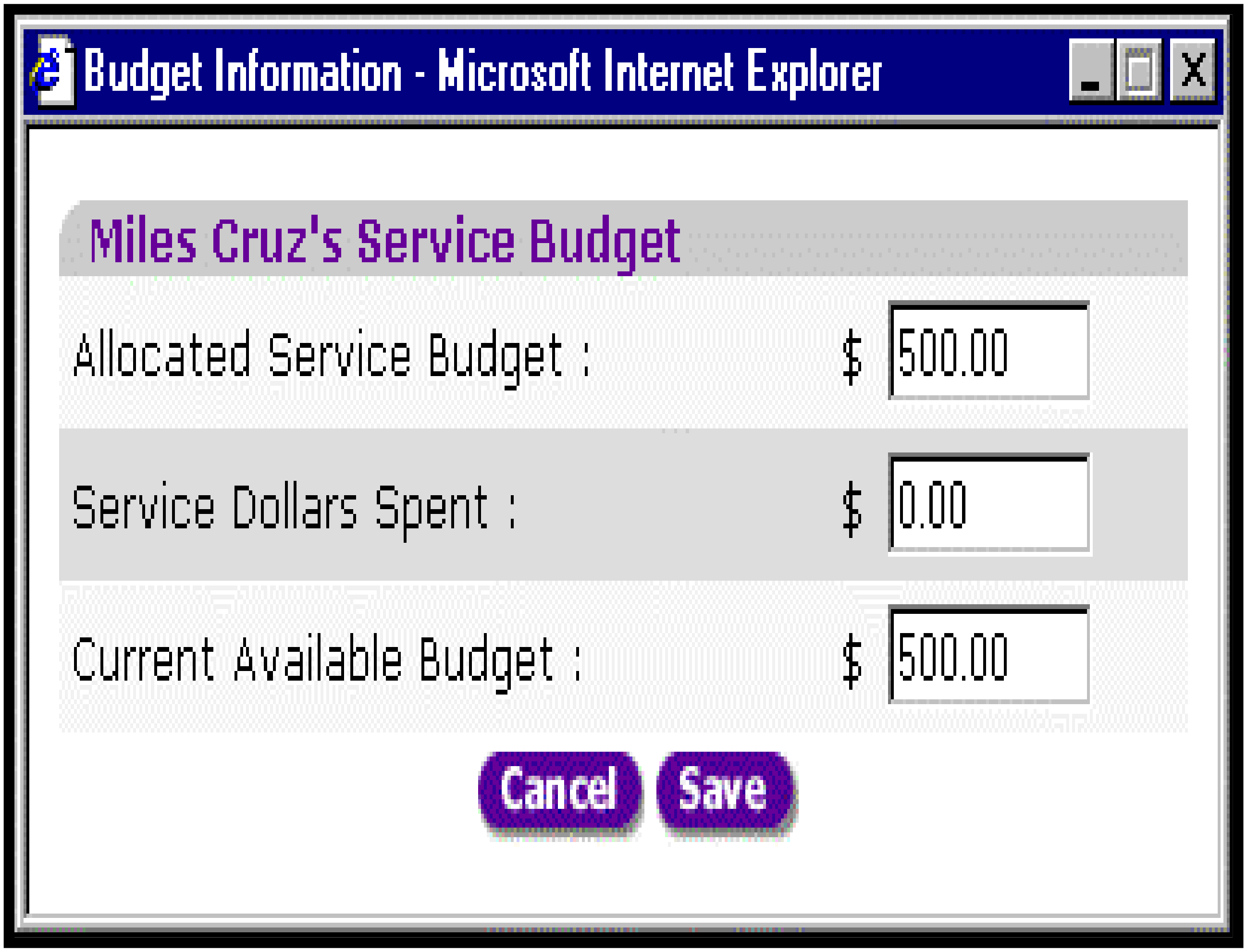
ENTER (if available) the provider's FEID number, website address, contact person, contact's phone number and e-mail, and the related contract number

ENTER (if available) the program cost and a program description for that provider

CLICK 'Save'

Helpful Tip:

Tip1: A provider may also be added by clicking one of the 'Add a new provider of services, training or employment' links on the OSST Desktop.



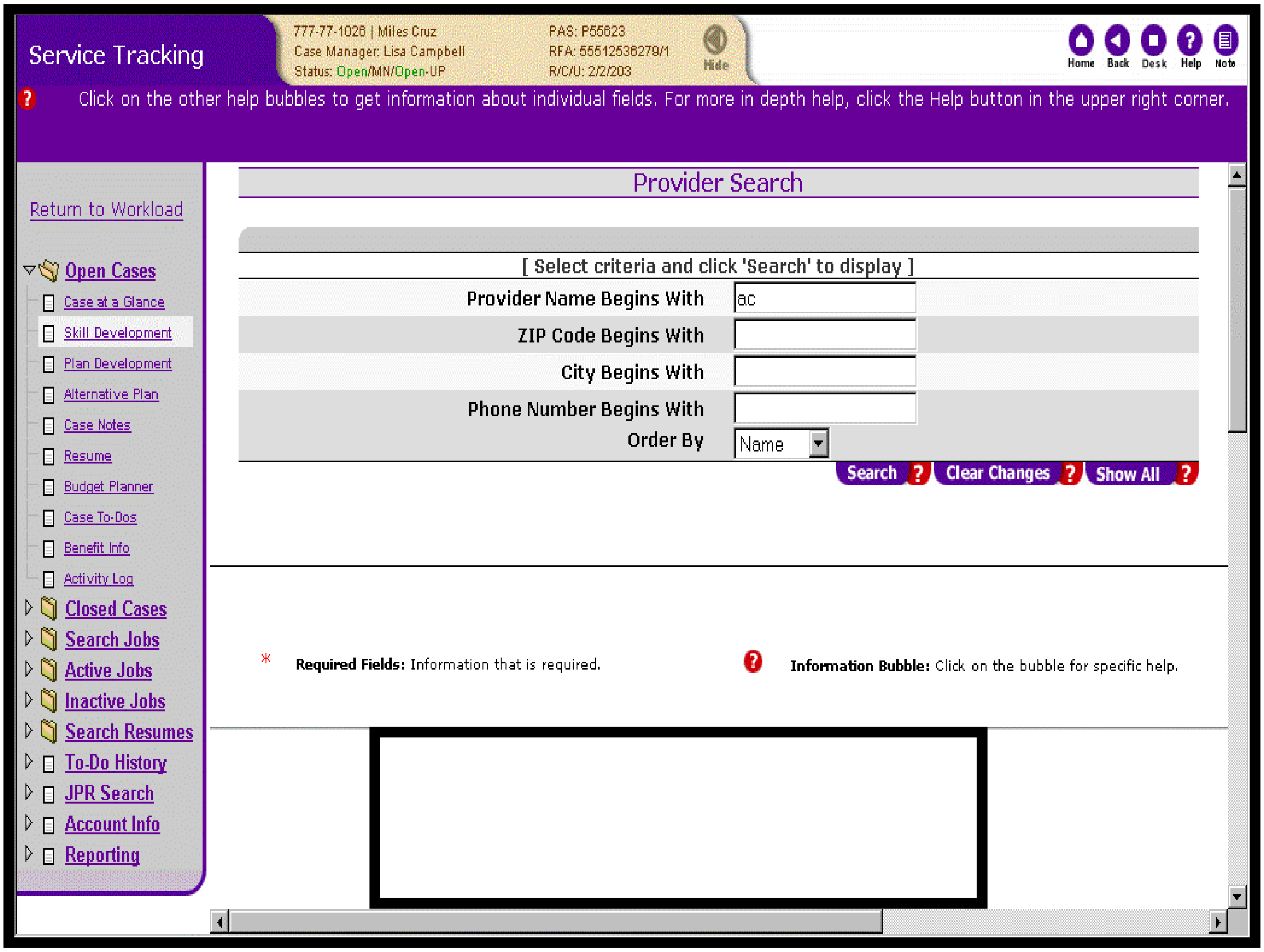
II. <u>Add a Service Budget Amount for a Customer</u>

CLICK the 'Skill Development' tab on the Case Detail

CLICK the hyperlink for the Service Budget found on the Service Plan

ENTER the budgeted supportive service dollar amount allocated to that customer in the Service Budget field

CLICK 'Save'



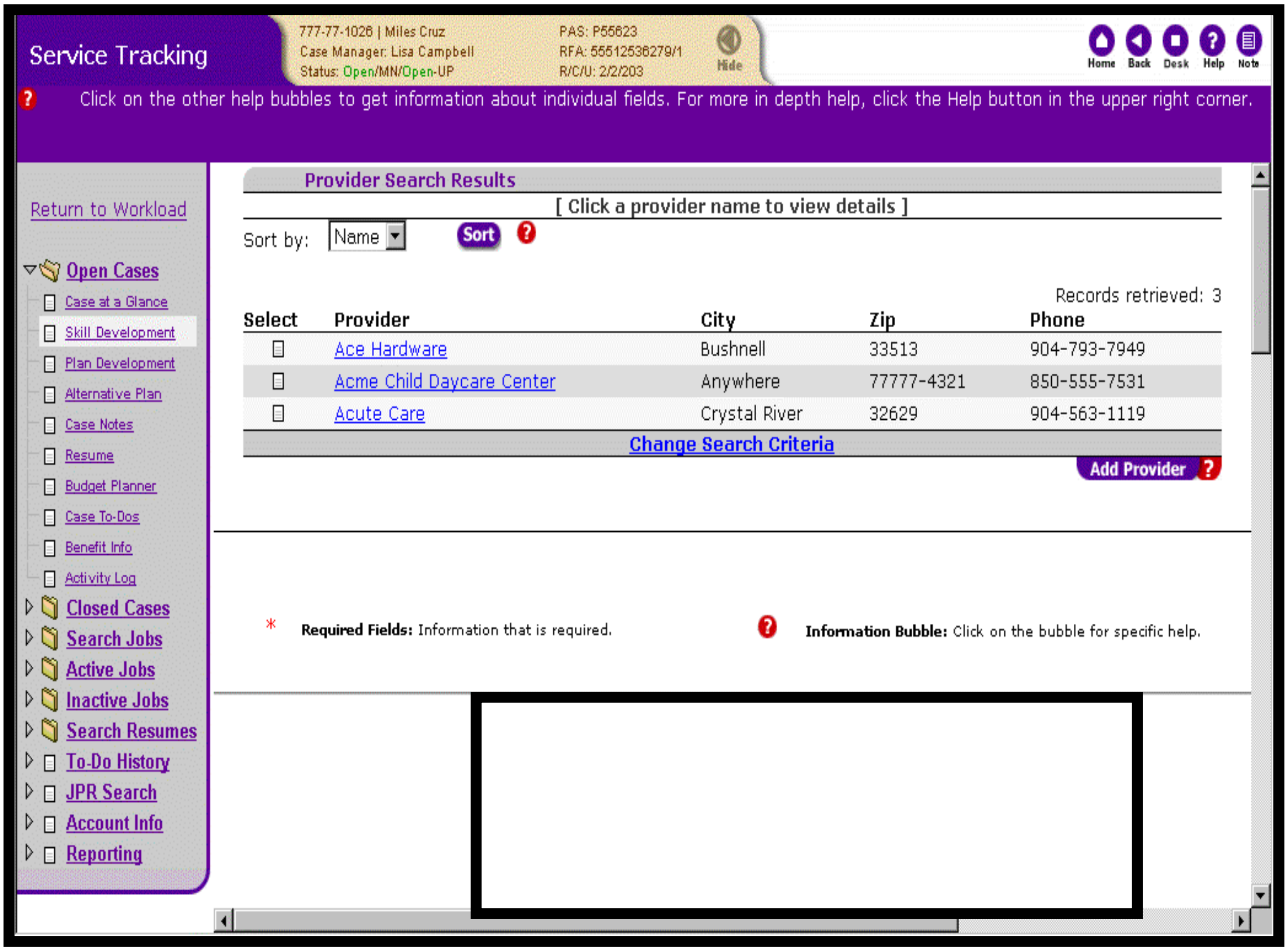
III. <u>Search for a Service Provider</u>

CLICK the ‘Skill Development’ tab on Case Detail

CLICK ‘Add’ on the Service Plan tab to begin

ENTER your search parameters (if you don’t enter any parameters, the system brings back all providers upon clicking the ‘Search’ button)

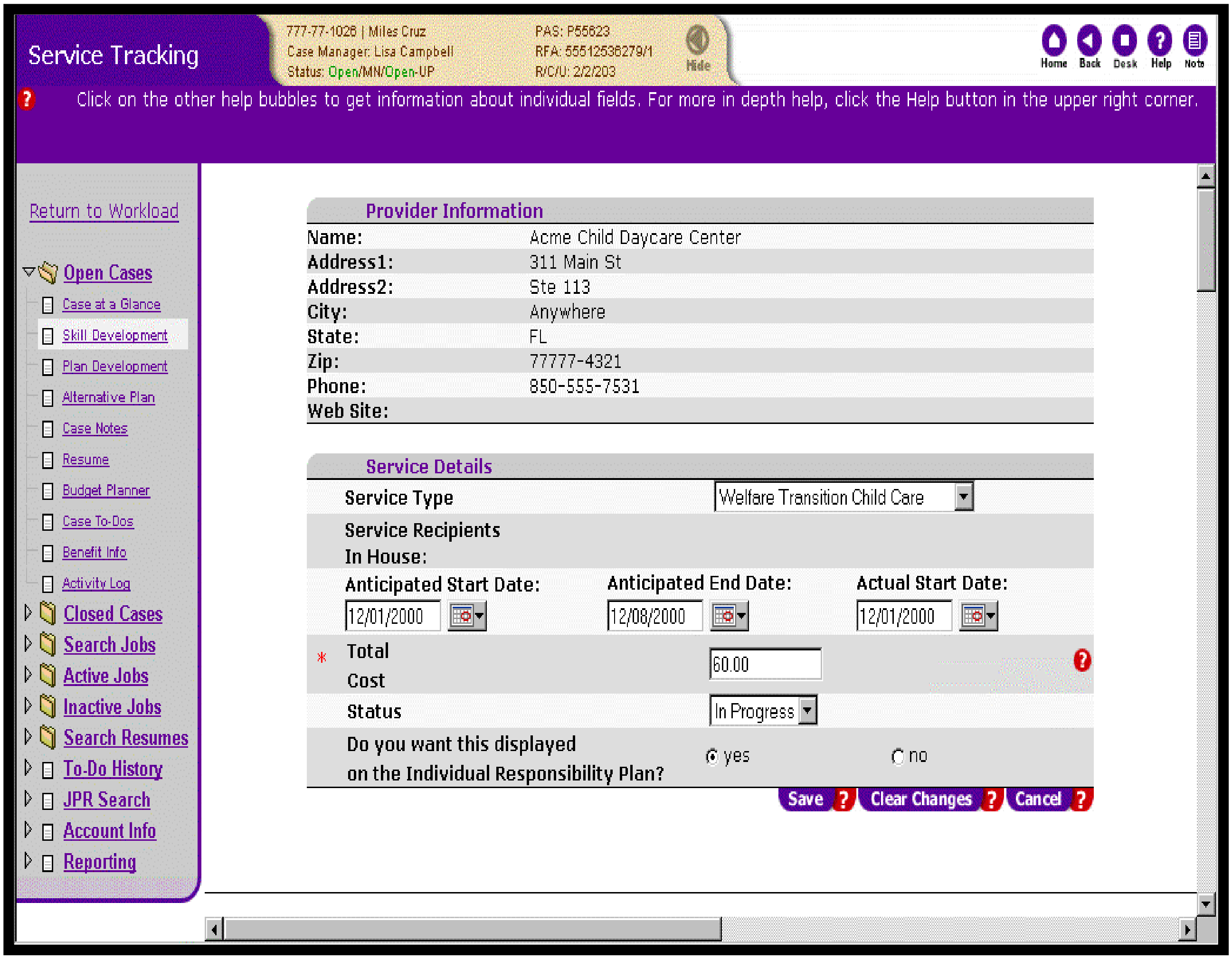
CLICK ‘Search’



IV. Sort Service Provider Results

SELECT the sort criteria of choice from the 'Sort by' drop down list

CLICK 'Sort' to view the search results by the parameter specified



V. <u>Add a Supportive Service</u>

CLICK the notepad image to add a service detail record for the selected provider.

SELECT the service type from the drop down list

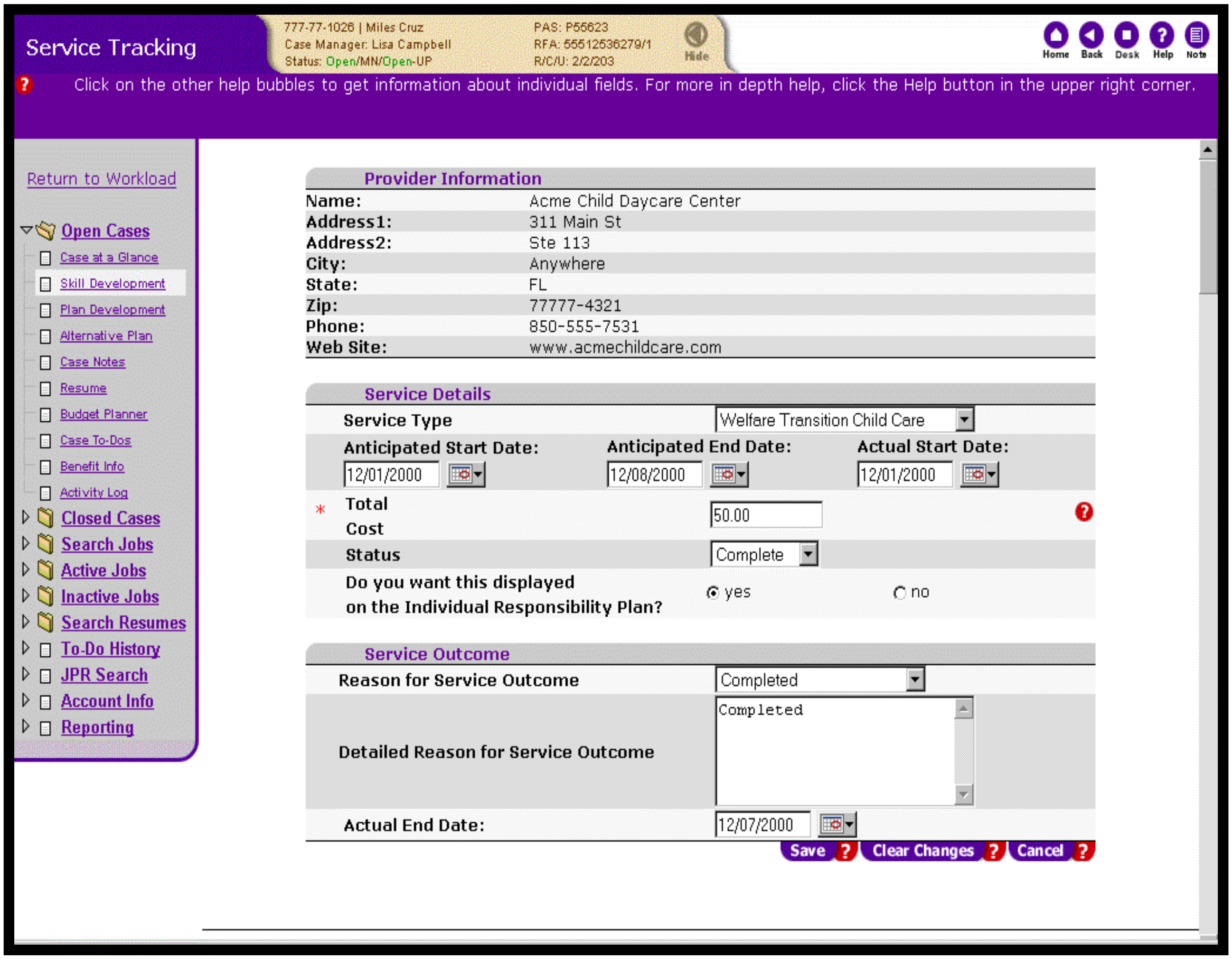
ENTER the anticipated start date and the anticipated end date (the actual start date will need to be entered once the customer actually begins the service)

ENTER the total cost of the service

SELECT the status of the service

CLICK 'Save'

NOTE: To view the service provider detail information prior to creating a service detail, simply click the hyperlink for the appropriate provider. If this is the correct provider click 'Add Provider' and the provider information and service detail page is displayed.



Entering Service Outcomes

The Service Outcome function provides the ability to capture information such as:

- Reason for service completion
- Detailed reason for service completion
- Actual end date of the service

This function is part of the Service Detail page, and can be accessed by clicking on the hyperlink for an existing service from the Case Detail page.

Associated Procedures:

<u>I. Record an Outcome for an existing service</u>

CLICK the ‘Skill Development’ tab on Case Detail

CLICK the hyperlink for the specific service from the Service Plan on Case Detail

ENTER the actual start date (if it has not already been entered)

SELECT a status of ‘Complete’ to show that the service has ended

SELECT the reason for the service ending from the ‘Reason for Service Outcome’ drop down list

ENTER a description of the reason for the service outcome (this is required if you selected ‘Other’ from the ‘Reason for Service Outcome’ drop down list)

ENTER the actual end date

CLICK ‘Save’

Activity: Using OSST for Initial Assessment Tasks

Scenarios:

- **Adding Education Details**
- **Adding Goals and Interests**
- **Adding Needs and Barriers**
- **Adding Steps to Self Sufficiency**
- **Adding Assessment Detail**
- **Adding/Editing Assessment Outcomes**
- **Adding a Supportive Service**

Now it's your turn to practice using the system! Here are your scenarios:

- Adding Education details
- Adding Goals and Interests
- Adding Needs and Barriers
- Adding Steps to Self Sufficiency
- Adding Assessment Detail
- Adding/Editing Assessment Outcomes
- Adding a Supportive Service (includes searching for a provider)

Questions?