



# One Stop Service Tracking

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## Module 4: Tracking Activity



### Introduction to Module 4: Tracking Activity

Tracking Activity refers to capturing information related to a customer's Skill Development activities, Job Placements and Benefit Information.

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

- ✓ **Add Activities and Training to create a Skill Development Plan**
- ✓ **Add/Edit/View Training/Activity Provider Detail**
- ✓ **Add/Edit/View Training/Activity Program Detail**
- ✓ **Create a Customer Placement**
- ✓ **Add/Edit/View Employer Detail**
- ✓ **Create JPR Entries**
- ✓ **View Benefit Information**



To understand the procedures associated with tracking customer activity, we will go through the following functions:

- Skill Development Planning (includes the Training/Activity Provider Search and Result function, Training/Activity Detail and Training/Activity Outcome)
- Adding/Editing/Viewing Training/Activity Provider Detail
- Adding/Editing/Viewing Training/Activity Program Detail
- Creating a record of Customer Placement (includes the Employer Search and Result function and Placement Summary)
- Adding/Editing/Viewing Employer Detail
- Creating Job Participation Rate Entries
- Viewing Benefit Information
- Requesting Transportation and Dependent Care Reimbursements for FSET customers

The screenshot displays the 'Service Tracking' application interface. At the top, the user is identified as Tyler A. Abbey, Case Manager, with contact information. The main navigation bar includes tabs for 'Case at a Glance', 'Skill Development', 'Plan Development', and 'Alternative Plan'. The 'Skill Development' tab is selected, showing a 'Case Detail for Tyler A. Abbey'. The interface is divided into sections: 'Service Plan', 'Job History/Placements', and 'Skill Development'. The 'Skill Development' section contains a table of activities. The table has columns for Activity, Start Date, End Date, Status, Days Enrolled, and Total Cost. One activity is listed: 'Vocational Training (Primary)' with a start date of 08/07/2000, status of 'IN PROGRESS', 143 days enrolled, and a total cost of \$0.00. Budget information is also displayed, showing a service budget of \$0.00 and an available budget of \$0.00. The interface includes various controls like 'Sort by', 'Add', and 'Show All' buttons.

This module starts with the Skill Development tab. The procedures associated with Skill Development are similar to the procedures associated with tracking Supportive Services.

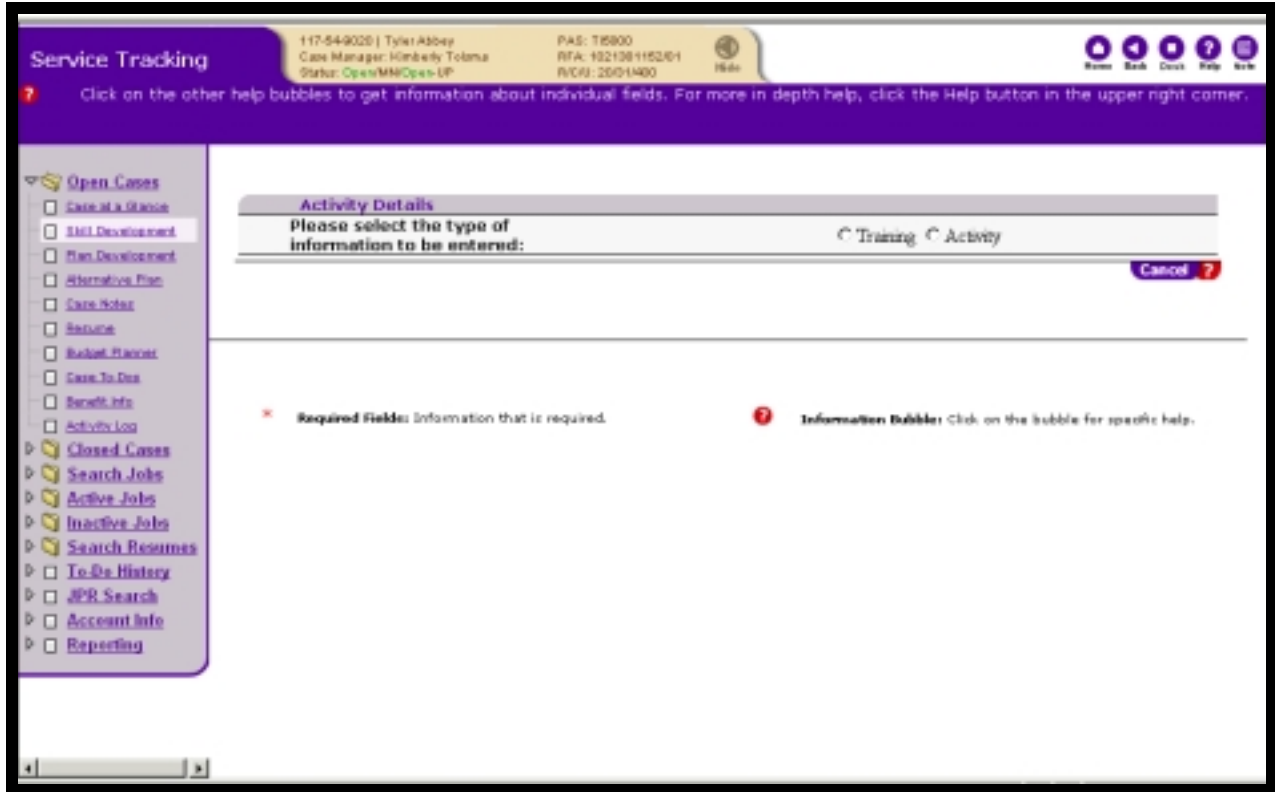
The Skill Development tab provides you with a starting point to do several things, including:

- Adding training and activity details for a customer
- Adding activity budget amounts for a customer
- Viewing and accessing “In Progress” activities to record training and activity outcomes
- Viewing all training and activities, including those that are completed

The next series of screens will take you through the procedures of how to perform each of these actions.

Once skill development activities have been added to the customer’s case, the Skill Development tab defaults to show a view of the customer’s “In Progress” skill development activities, including:

- The activity/training type
- The period that the activity/training began and ended
- The status of the activity/training
- The number of days that the customer has been enrolled in the activity/training
- The total cost of the activity/training



## Adding Training

Adding training begins with the Skill Development Plan tab. Clicking the 'Add' button will prompt the user to choose whether to add a training record or an activity record to the customer's case.

**Service Tracking** 117-549020 | Tyler Abbey  
Case Manager: KIM@eddy Tolson  
Status: Open/MN/Open LP PAB: 10800  
RFA: 1021281102/01  
R/C/O: 2001400 Help

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.

### Provider Search

[ Select criteria and click 'Search' to display ]

**Include** Training Providers

Provider Name Begins With

ZIP Code Begins With

Program Name Begins With

Phone Number Begins With

Order By Name

**Services - Check to include as limits**

Accredited?

VA Approved?

Job Placement?

Voc. Counseling?

Assessment Services?

Child Care?

Financial Aid?

Search Clear Changes Show All

**Required Fields:** Information that is required. **Information Bubbles:** Click on the bubble for specific help.

## Conducting a provider search

After choosing whether to add a training record or an activity record to the customer's case, the user is prompted with the provider search page. This page allows the user to specify parameters such as:

- Provider Name
- Zip Code
- Program Name (the area of study)
- Phone Number

The screenshot displays the 'Service Tracking' application interface. At the top, there is a header with user information: '117-949020 | Tyler Abbey', 'Case Manager: Kimberly Tolosa', 'Status: Open/MIS/Open LP', 'PAE: 18900', 'RFA: 1021281102/01', and 'R/C/O: 2021490'. A navigation bar contains icons for Home, Back, Next, Help, and Print. A message states: '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 titled 'Provider Search Results' and includes a sub-header '[ Click a provider name to view details ]'. Below this, there is a 'Sort by:' dropdown menu set to 'Name' and a 'Sort' button. A table displays the search results:

Select	School	City	Phone
<input type="checkbox"/>	<a href="#">Indian River Community Co</a>	Fort Pierce	561-462-4700

Below the table, there is a 'Change Search Criteria' link and an 'Add Provider' button. The page also shows 'Records retrieved: 1'. At the bottom, there are two information bubbles: 'Required Fields: Information that is required.' and 'Information Bubble: Click on the bubble for specific help.'

## Viewing provider search results

The search results page will bring back a list of results based on the parameters that were specified on the provider search page. From the search results page, the user can:

- Click the 'Select' icon to add the provider directly to a training record for the customer
- Click the provider's hyperlink to view provider details
- View the city where the provider is located
- View the provider's phone number
- Click to add a provider (if the user does not find the provider he/she is searching for)

## Sorting provider search results

If multiple results are returned, the user can sort the results by the following criteria:

- Name
- City
- Phone

To sort the search results, the user can select the criteria of choice from the 'Sort by' drop down list and then click the 'Sort' button.

**Service Tracking** 117-549020 | Tyler Abbey  
Case Manager: Kimberly Tolena  
Status: Open/MN/Open-UP PAS: 116900  
RTA: 1321381152/01  
R/C/J: 2001400

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.

**Open Cases**

- Case at a Glance
- Skill Development
- Plan Development
- Alternative Plan
- Case Notes
- Secure
- Budget History
- Case To Do's
- Benefit Info
- Activity Log

**Closed Cases**

- Search Jobs
- Active Jobs
- Inactive Jobs
- Search Resumes
- To-Do History
- JPR Search
- Account Info
- Reporting

**Provider Information**

Name: Indian River Cmty College  
Address1: 3209 Virginia Ave  
Address2:  
City: Fort Pierce  
State: FL  
Zip: 34981-5596  
Phone: 861-462-4700  
Web Site:

**Training Details**

Do you want this displayed on the Individual Responsibility Plan?  Yes  No

\* Training Category: [Dropdown]  
\* Course Name: [Text]  
Expected Outcome: [Text]  
Area of Study: [Text]  
Training Cost: 0.00  
Funding Source: [Dropdown]  
\* Hours Scheduled: [Text]

Anticipated Start Date: [Date Picker] Anticipated End Date: [Date Picker]

Save ? Clear Changes ? Cancel ?

## Completing the Training Detail page

Selecting a provider will populate a training record with the provider's information. The remaining detail should be completed by the user.

### Associated Procedures:

#### I. Add Training

**CLICK** 'Add' on the Skill Development tab to begin

**CLICK** the radio button to indicate that you are adding training

**ENTER** your search parameters (if you don't enter any parameters, the system will bring back all providers upon clicking the 'Search' button)

**CLICK** 'Search'

**CLICK** the 'Select' icon next to the training provider you would like to add. Clicking this icon will populate a training record with this training provider's information.

**CLICK** the radio button to indicate whether you would like this training displayed on the Individual Responsibility Plan (this is defaulted to 'Yes')

**SELECT** the training category

**ENTER** the course name

**ENTER** the expected outcome (e.g., a degree, a certificate)

**ENTER** a description of the area of study

**ENTER** the total cost of the training

**SELECT** the funding source (if applicable)

**ENTER** the hours that the customer is scheduled to attend training

**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 training)

**CLICK** 'Save'

## II. Add Activity

**CLICK** 'Add' on the Skill Development tab to begin

**CLICK** 'Add'

**CLICK** the radio button to indicate that you are adding an activity

**ENTER** your search parameters (if you don't enter any parameters, the system will bring back all providers upon clicking the 'Search' button)

**CLICK** 'Search'

**CLICK** the 'Select' button next to the activity provider you would like to add (this will populate an activity record with this activity provider's information).

**CLICK** the radio button to indicate whether you would like this activity displayed on the Individual Responsibility Plan (which is defaulted to 'Yes')

**SELECT** the activity category

**ENTER** the course name

**ENTER** the total cost of the activity

**ENTER** the expected outcome



**ENTER** the scheduled hours

**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 activity)

**CLICK** 'Save'

The screenshot shows the 'Service Tracking' application interface. At the top, there is a header with case information: '117-949020 | Tyler Abbey', 'Case Manager: Kimberly Tolosa', 'Status: Open/Misc/Open LP', 'PA#: 18900', 'RFA: 1021281102/01', and 'R/C/O: 2001490'. Below the header is a navigation bar with tabs: 'Case at a Glance', 'Skill Development' (selected), 'Plan Development', and 'Alternative Plan'. The main content area is titled 'Case Detail for Tyler A Abbey' and contains several sections: 'Service Plan' with a 'Sort by: Date' dropdown and a 'Sort' button; a table with columns 'Service Type', 'Start Date', 'End Date', 'Status', 'Days Enrolled', and 'Total Cost'; 'Job History/Placements' with a 'Sort by: Start Date' dropdown and an 'Add' button; 'Skill Development' with a 'Sort by: Date' dropdown and a 'Sort' button; and 'Job Participation Rate' with an 'Add' button. The table in the Skill Development section shows one activity: 'Vocational Training (Primary)' with a start date of 08/07/2008, a status of 'IN PROGRESS', 143 days enrolled, and a total cost of \$0.00. The table also shows 'Service Budget: \$ 9.00' and 'Available Budget: 0.00'.

## Viewing current and historical skill development records

To view a customer's current and/or historical skill development records, simply click the hyperlink for the specific service on the Skill Development tab. The Skill Development tab defaults to showing the current, 'In Progress' training and activities, but can be expanded to show historical training and activities by clicking the 'Show All' button.

## Entering Training and Activity Outcomes

At the time that a customer completes a training course or an activity, it is necessary for the career manager to access the record detail and enter a training or activity outcome.

The Activity/Training Outcome function provides the ability to capture information such as:

- Reason for activity or training completion
- Detailed reason for activity or training completion
- Actual end date of the activity or training

## Associated Procedures:

### I. Record an Outcome for an existing Activity

**CLICK** the hyperlink for the specific activity from the Skill Development tab on Case Detail

**SELECT** a status of 'Complete' to show that the activity has ended (under the Activity Details portion of the page)

**ENTER** the actual start date (if it has already not been entered)- this date is under the Outcome portion of the page

**SELECT** the outcome (the reason for the activity ending) from the 'Outcome' drop down list

**ENTER** the actual end date

**CLICK** 'Save'

## II. Record an Outcome for existing Training

**CLICK** the hyperlink for the specific training from the Skill Development tab on Case Detail

**SELECT** a status of 'Complete' to show that the training has ended (under the Activity Details portion of the page)

**ENTER** the actual start date (if it has already not been entered)- this date is under the Outcome portion of the page

**SELECT** the reason for the training ending from the 'Reason for Course Ending' drop down list

**ENTER** a description of the reason for the training outcome (this is required if you selected 'Other' from the 'Reason for Course Ending' drop down list)

**SELECT** the statement that best describes the customer's satisfaction with the course from the 'Customer's Satisfaction with Course' drop down list

**ENTER** the actual end date

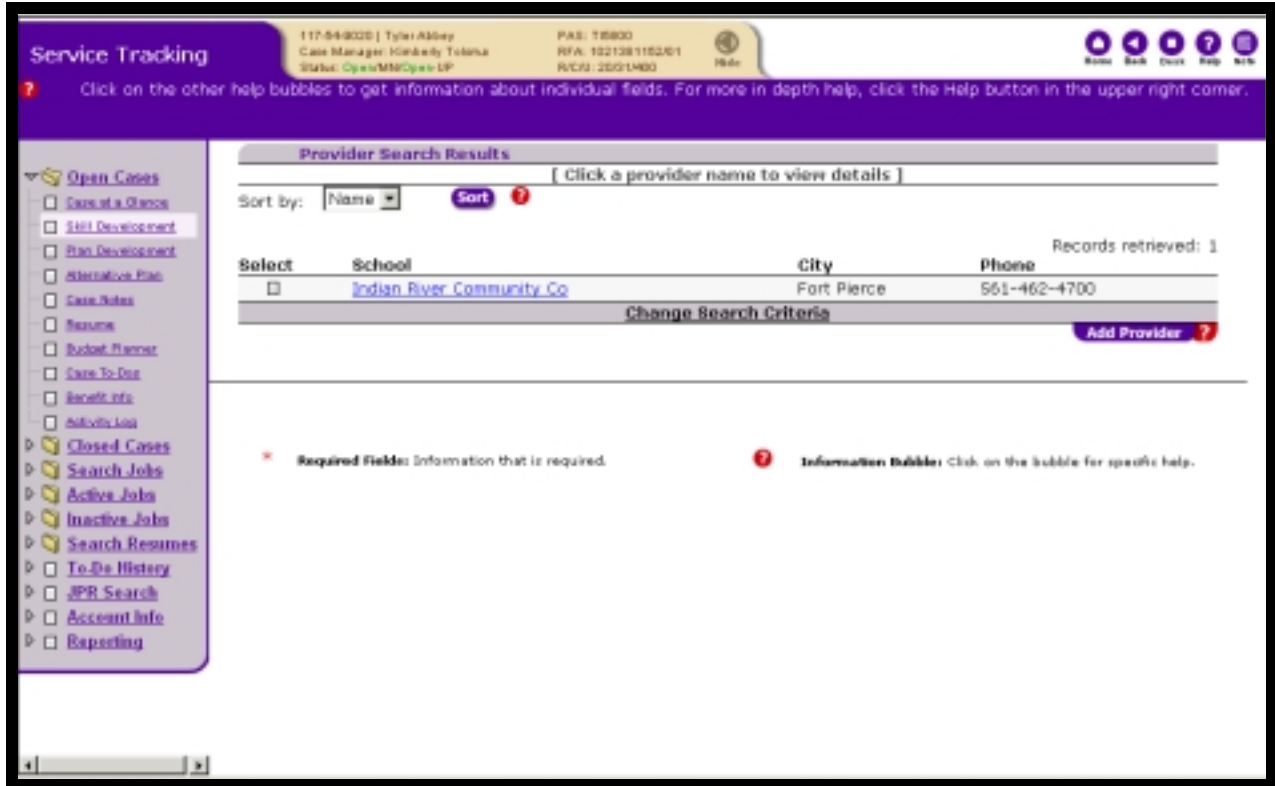
**CLICK** 'Save'

**Jennifer Aniston's Training Budget**

Allocated Training Budget :	\$	<input type="text" value="0.00"/>
Training Dollars Spent :	\$	<input type="text" value="551.00"/>
Current Available Budget :	\$	<input type="text" value="-551.00"/>

### Adding a Budget

To add/edit a customer's available budget, simply click the hyperlink next to 'Activity Budget.' Clicking this will prompt the user with a pop up box to enter the customer's allocated activity budget.



## Adding a Provider

In the case that a search does not return the provider that the user is looking for, the user has the ability to add a provider by clicking the 'Add Provider' button from the Search Results page. Providers can also be added by clicking the appropriate 'Add Provider' link on the OSST desktop page.

Clicking 'Add Provider' will prompt the user with a series of Provider Registration pages.

**Service Tracking**

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.

**New Training Provider**

Phone (0561) 462 - 5303

Employment Provider?  Check if Yes

Training Provider?  Check if Yes

Service Provider?  Check if Yes

**Continue**

**Tips:**

To the left, enter the phone number of the provider you would like to add. The purpose of this is to validate that the provider does not already exist in the system.

Use the checkboxes to indicate what type of provider you are adding. Remember that a provider can be more than one type.

When finished, click the **continue** button.

**Confidential Fields:** Not accessible to other users if the "No Confidential Information" disclosure level is chosen in Preferences.

**Searchable Fields:** Information that can be searched upon by other parties, such as employers and jobseekers.

**Required Fields:** Information that is required.

**Information Bubbles:** Click on the bubble for specific help.

The first page in this series requires the user to input the phone number of the new provider and to specify if the provider is a service, training or employment provider or any combination of the three.

**Service Tracking**

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.

**New Training Provider**

Name

Address

Address

City

County

State

Zip

FEID Number

Phone (561) 462 - 5100

Fax ( ) -

Website

Contact

Title

eMail

Contract Number

**Training Information**

Type All

Accredited?  Check if Yes

VA Approved?  Check if Yes

Job Placement?  Check if Yes

Vac. Counseling?  Check if Yes

Assessment Services?  Check if Yes

**Tips:**

To the left, enter the detailed information on the selected training provider.

For changes in address information, simply type the correct information in the form.

When finished, click the save button.

Entering the phone number as the first step in the provider registration process helps to ensure that the provider does not already exist in the database. After entering the provider's phone number, the user will be prompted with a provider information page. If the provider does currently exist in the database, the provider's information that exists will be launched in an edit mode. If the provider does not currently exist, the user will be prompted to continue completing provider registration information which captures some basic information about the provider, including:

- Name of the provider
- Address (street, city, county, state, zip)
- FEID number
- Additional information if available (fax, website, primary contact, contact e-mail, contract number)

### Associated Procedures:

#### I. Add a Provider (From the Search Results Page)

**CLICK** 'Add Provider'

**ENTER** the provider's phone number (performs a check with the database to ensure that this provider isn't already listed)

**CLICK** the check box to indicate what type of provider you are adding (a provider can be more than one type- for example, both an employment provider and a training provider)

**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, the related contract

**SELECT** the appropriate check boxes regarding accreditation, VA approved, job placement, vocational counseling, assessment services, child care and financial aid

**CLICK** 'Save'

## II. Add Program Details for a Provider

After conducting a provider search, click the hyperlink for the specific provider on the Search Results page.

**CLICK** 'Add' under the 'All Programs for School' section of the page

**ENTER** the program name

**ENTER** a program description

**ENTER** the total cost of the program (tuition)

**ENTER** the clock hours for the program

**ENTER** the credit hours for the program

**CLICK** 'Save'



**Service Tracking**

117-040020 | Tyler Akbar  
Case Manager: Kimberly Tolosa  
Status: Open/NA/Open LP

PAS: T8900  
RFA: 032130115201  
WCAJ: 20014800

Home Back Dock Help Help

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.

### Provider Search

[ Select criteria and click 'Search' to display ]

Provider Name Begins With	<input type="text"/>
Contact Name Contains	<input type="text"/>
ZIP Code Begins With	<input type="text"/>
City Begins With	<input type="text"/>
Phone Number Begins With	<input type="text"/>
Occupational Title	<input type="text"/>
In region	<input type="text"/>
In county	Alachua
Order By	Name

Search ? Clear Changes ? Show All ?

\* Required Fields: Information that is required.      ? Information Bubbles: Click on the bubble for specific help.

## Adding a customer placement

Adding a customer placement involves a series of steps, including:

- Searching for an employment provider (to see if they already exist in the database)
- Adding an employment provider to the database
- Adding placement detail
- Conducting placement follow ups for a customer

Let's start this next series of screens with the Employer Search function. Similar to the other 'Search' functions we've looked at, this page gives you the ability to enter several criteria in order to search for particular employers. The intent is to search to see if the employer already exists in the database. If the employer exists, there is no need to have a duplicate entry in the database. If the employer does not exist, you will have the ability to add the employer information. You have the ability to search for a provider based on:

- Provider Name
- Contact Name
- Zip Code
- City
- Phone Number
- Occupational Title
- Region
- County

**Service Tracking**  
 117-044020 | Tyler Abbas  
 Case Manager: Kimberly Tolome  
 Status: Open/NA/Open/UP  
 PAS: 7/6/00  
 RPA: 032138118201  
 R/C/J: 25/0/1400  
 Home Back Desk Help Help

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.

**Provider Search Results**  
 [ Click a provider name to view details ]

Sort by:

Records retrieved: 15

Select	Employer	City	Phone
<input type="checkbox"/>	<a href="#">A &amp; B Wholesale Silk</a>	Port St Lucie	407-878-7576
<input type="checkbox"/>	<a href="#">ABC Toys &amp; All</a>	Port St. Lucie	561-878-7829
<input type="checkbox"/>	<a href="#">Accent On Excellence</a>	Port St Lucie	407-335-7873
<input type="checkbox"/>	<a href="#">Adella's Hair Salon</a>	Port St. Lucie	561-343-0110
<input type="checkbox"/>	<a href="#">Aggie</a>	Pt. St. Lucie	561-398-2000
<input type="checkbox"/>	<a href="#">Affordable Silk</a>	Pal	407-871-1900
<input type="checkbox"/>	<a href="#">Alan Pancy Garage</a>	Pt. St. Lucie F	407-878-8698
<input type="checkbox"/>	<a href="#">Allied Universal</a>	Port St Lucie	407-464-6195
<input type="checkbox"/>	<a href="#">Ameri-Loan</a>	Pt. St. Lucie	561-785-5775
<input type="checkbox"/>	<a href="#">America Clean</a>	Port St Lucie	561-878-9001
<input type="checkbox"/>	<a href="#">America Habilitation</a>	Ft. Pierce	561-879-1925
<input type="checkbox"/>	<a href="#">American Habilitation Ser</a>	Port St Lucie	561-879-1925
<input type="checkbox"/>	<a href="#">Anna Faustini</a>	Pt St Lucie	407-879-3857
<input type="checkbox"/>	<a href="#">Artistic Cabinets</a>	Port St Lucie	407-340-0411
<input type="checkbox"/>	<a href="#">Avanti Carpet Cleaning Co</a>	Port St Lucie	561-879-0079

[Change Search Criteria](#)

The providers that result are based on the criteria that you entered on the Search page.

As with earlier provider searches, if multiple results are returned, the user can sort the results by the following criteria:

- Employer Name
- City
- Phone

To sort the search results, the user can select the criteria of choice from the 'Sort by' drop down list and then click the 'Sort' button.

## Associated Procedures: (Navigating from the Case Detail)

### I. Search for an employment provider

**CLICK** 'Add' under the Job History/Placement tab (this will bring you to the Employment Provider Search page)

**ENTER** your search parameters (if you don't enter any parameters, the system will bring back all providers upon clicking the 'Search' or 'Show All' button)

**CLICK** 'Search'

The screenshot displays the 'Service Tracking' application interface. At the top, there is a header bar with the title 'Service Tracking' and user information: '117-044620 | Tyler Abbey', 'Case Manager: Kimberly Tolosa', 'Status: Open/NM/Open-UP', 'PAS: T8800', 'RFA: 432138118201', and 'R/C/R: 25/31/00'. There are navigation buttons for Home, Back, Desk, Help, and Log Out. A help bubble contains 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 divided into two sections:

- Employer Information:**
  - Company Name: Abc Toys & All
  - Address1: 350 Gulfstream Ave
  - Address2:
  - City: Port St. Lucie
  - State: FL
  - Zip: 34983-0000
  - Web Site:
- Job Placement Details for TYLER ABBEY:**
  - Job Title: [Text Field]
  - OES Classification: [Dropdown Menu]
  - Employer's Contact Name: [Text Field]
  - Was customer employed in this job at Registration?:  Yes  No
  - Type of Employment: [Dropdown Menu]
  - Description and duties of job: [Text Area]
  - How was placement made?: [Dropdown Menu]
  - Job Referral Tracking Number: [Text Field]
  - Name of person who made the placement: [Text Field]
  - Start Date of Employment: [Text Field]

A sidebar on the left contains a tree view of navigation options: Open Cases (Cases at a Glance, Still Development, Plan Development, Alternative Plan, Case Notes, Resume, Budget Forecast, Case To Do, Benefit Info, Activity Log), Closed Cases, Search Jobs (Active Jobs, Inactive Jobs), Search Resumes, To-Do History, JPB Search, Account Info, and Reporting.

## Associated Procedures:

### I. Create placement detail (From the employer provider search results)

**CLICK** 'Add' on the Job History/Placement tab to begin

**ENTER** your search parameters (if you don't enter any parameters, the system will bring back all providers upon clicking the 'Search' button)

**CLICK** 'Search'

**CLICK** the 'Select' icon next to the employer you would like to add. Clicking this icon will populate a placement record with this employer's information.

**ENTER** the customer's job title

**ENTER** the OES title associated with the customer's job

**ENTER** the name of the contact person located at the employer (the person who you will most likely call for placement follow up)

**CLICK** the radio button to indicate whether or not the customer was employed in this job at the time of registration

**SELECT** the type of employment (private, subsidized public, subsidized private) from the drop down list

**SELECT** the statement from the drop down list that best describes how the job placement was made

**ENTER** a job referral tracking number (if applicable)

**SELECT** the name of the person from your unit who gets credit for this placement

**ENTER** the start date of the placement

**ENTER** the date of the first paycheck

**ENTER** the customer's starting wage

**SELECT** the customer's pay frequency

**ENTER** the customer's weekly scheduled hours

**CLICK** the appropriate radio button to indicate whether this placement should be added to the customer's resume

**CLICK** 'Save'

**Service Tracking**

082-42-1718 | Carol Stepien  
Case Manager: KIM@ady Totoma  
Status: Open/MN/Opn TP

PAS: F04613  
RFA: 1123252015/01  
R/CJ: 2501480

Home Back Print Help

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.

**Open Cases**

- Cases at a Glance
- Still Development
- Plan Development
- Alternative Plan
- Case Notes
- Resume
- Budget Planner
- Case To-Do's
- Benefits Info
- Activity Log

**Closed Cases**

- Search Jobs
- Active Jobs
- Inactive Jobs
- Search Resumes
- To-Do History
- JPR Search
- Account Info
- Reporting

**Employer Information**

Company Name: Ameri Life Health  
Address1: 112 S. U.S. Hwy.1  
Address2:  
City: Vero Beach  
State: FL  
Zip: 32962-0000  
Phone: 561-567-9191  
Web Site:

**Follow-Up Record**

Follow-up Type	Date of Follow-up	Employment Status	Wage
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**Add/Edit Follow-Up Record**

\* Date follow-up was conducted:

Name of Contact spoken to:

\* Was customer employed at Follow-up?  Yes  No

Type of Follow-up:

Wage (per-hour) at Follow-up:

Hours (per-week) Scheduled at Follow-up:

\* Type of verification used:

Save Clear Changes ? Cancel ?

## Tracking Placement Follow-up

Depending on your region's local policies, customer placement follow-ups are done at specific periods of time (e.g., 30 days after placement, 60 days after placement, etc.) The follow-up record will capture information such as:

- the date the follow-up was conducted
- the name of the contact that verified the follow-up (if follow-up was done by phone)
- the type of follow-up (30, 60, 90, etc.)
- the customer's wage at follow-up
- the hours per week scheduled at follow-up
- the type of verification used (phone call, pay stub, etc.)

### Associated Procedures:

I. Documenting a placement follow-up (Navigating from the Job History/Placements tab on the Case Detail)

**CLICK** the hyperlink for follow-up next to the specific job for which you are conducting a follow-up

**ENTER** the date the follow-up was conducted

**ENTER** the name of the contact person at the employer that confirmed the customer's follow-up

**SELECT** the type of follow-up from the drop down list

**ENTER** the customer's wage (per hour) at the time of follow-up

**ENTER** the customer's scheduled hours per week at the time of follow-up

**ENTER** the type of verification used for the follow-up (e.g., phone call)

**CLICK** 'Save'

**Service Tracking**

117-044620 | Tyler Abbas  
Case Manager: Kimberly Tolome  
Status: Open/NM/Open-UP

PAS: T8900  
RPA: 032138118201  
RCA: 2501400

Home Back Desk Help Help

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.

**Provider Search Results** [ Click a provider name to view details ]

Sort by:  **Sort**

Records retrieved: 15

Select	Employer	City	Phone
<input type="checkbox"/>	<a href="#">A &amp; B Wholesale Silk</a>	Port St Lucie	407-878-7576
<input type="checkbox"/>	<a href="#">Abc Toys &amp; All</a>	Port St. Lucie	561-878-7829
<input type="checkbox"/>	<a href="#">Accent On Excellence</a>	Port St Lucie	407-335-7873
<input type="checkbox"/>	<a href="#">Adella's Hair Salon</a>	Port St. Lucie	561-343-0110
<input type="checkbox"/>	<a href="#">Aggie's</a>	Pt. St. Lucie	561-398-2000
<input type="checkbox"/>	<a href="#">Affordable Silk</a>	Pal	407-871-1900
<input type="checkbox"/>	<a href="#">Alan Pancy Garage</a>	Pt. St. Lucie F	407-878-8698
<input type="checkbox"/>	<a href="#">Allied Universal</a>	Port St Lucie	407-464-6195
<input type="checkbox"/>	<a href="#">Ameri-Loan</a>	Pt. St. Lucie	561-785-5775
<input type="checkbox"/>	<a href="#">America Clean</a>	Port St Lucie	561-878-9001
<input type="checkbox"/>	<a href="#">America Habitation</a>	Ft. Pierce	561-879-1925
<input type="checkbox"/>	<a href="#">American Habitation Ser</a>	Port St Lucie	561-879-1925
<input type="checkbox"/>	<a href="#">Anna Faustini</a>	Pt St Lucie	407-879-3857
<input type="checkbox"/>	<a href="#">Artistic Cabinets</a>	Port St Lucie	407-340-0411
<input type="checkbox"/>	<a href="#">Avanti Carpet Cleaning Co</a>	Port St Lucie	561-879-0079

[Change Search Criteria](#) **Add Provider**

## Adding an Employer

In the case that a search does not return the employer that the user is looking for, the user has the ability to add a provider by clicking the 'Add Provider' button from the Employer Search Results page. Employers can also be added by clicking the appropriate 'Add Provider' link on the OSST desktop page.

Clicking 'Add Provider' will prompt the user with a series of Provider Registration pages.

The screenshot displays the 'Service Tracking' application interface. At the top, a purple header bar contains the title 'Service Tracking' on the left and user information on the right: '117-040020 | Tyler Abbas', 'Case Manager: Kimberly Tolome', 'Status: Open/NA/Open-UP', 'PAS: T6900', 'RFA: 102130115201', and 'RCA: 2501400'. In the top right corner, there are navigation icons for Home, Back, Dock, Help, and Site. Below the header, a purple banner contains a message: '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 divided into a sidebar on the left and a central form area. The sidebar, titled 'Open Cases', lists various categories with expandable arrows: Case at a Glance, Job Development, Prior Development, Alternative Plan, Case Notes, Resource, Budget Forecast, Case To Do's, Benefit Info, Activity Log, Closed Cases, Search Jobs, Active Jobs, Inactive Jobs, Search Resumes, To-Do History, JPR Search, Account Info, and Reporting.

The central form area is titled 'New Employment Provider'. It contains a 'Phone' field with a red asterisk indicating it is required. Below the phone field are three checkboxes: 'Employment Provider?' (with 'Check if Yes'), 'Training Provider?' (with 'Check if Yes'), and 'Service Provider?' (with 'Check if Yes'). A 'Continue ?' button is located at the bottom right of the form.

To the right of the form, a 'Tips:' section provides instructions: 'To the left, enter the phone number of the provider you would like to add. The purpose of this is to validate that the provider does not already exist in the system. Use the checkboxes to indicate what type of provider you are adding. Remember that a provider can be more than one type. When finished, click the continue button.'

At the bottom of the form area, there are four informational bubbles:
 

- Confidential Fields:** Not accessible to other users if the 'No Confidential Information' disclosure level is chosen in Preferences.
- Searchable Fields:** Information that can be searched upon by other parties, such as employers and jobseekers.
- Required Fields:** Information that is required.
- Information Bubble:** Click on the bubble for specific help.

The first page in this series requires the user to input the phone number of the new employment provider and to specify if the provider is a service, training or employment provider or any combination of the three.



**Service Tracking** 117-949020 | Tyler Abbey  
Case Manager: Kimberly Tolson  
Status: Open/MN/Open LP PAB: 10800  
RFA: 1021281102/01  
R/C/D: 2001/000 Help

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.

**New Employment Provider**

Name

Address

Address

City

County

State

Zip  -

FEID Number

Phone (561) > 482 - 4000

Fax ( ) > -

Website

Contact

Title

eMail

Save ? Cancel ?

**Tips:**

To the left, enter the detailed information on the selected training provider.

For changes in address information, simply type the correct information in the form.

When finished, click the save button.

**Open Cases**

- Cases at a Glance
- Skill Development
- Plan Development
- Alternative Plan
- Case Notes
- Resume
- Budget Planner
- Case To-Do
- Benefit Info
- Activity Log

**Closed Cases**

- Search Jobs
- Active Jobs
- Inactive Jobs
- Search Resumes
- To-Do History
- JPR Search
- Account Info
- Reporting

Confidential Fields: Not accessible to other users if the 'No' checkbox is selected.

Searchable Fields: Information that can be searched upon by other users.

## Add/Edit Employer Information

As with the service and training provider registrations, entering the phone number as the first step in the provider registration process helps to ensure that the provider does not already exist in the database. After entering the provider's phone number, the user will be prompted with a provider information page. If the provider does currently exist in the database, the provider's information that exists will be launched in an edit mode. If the provider does not currently exist, the user will be prompted to continue completing provider registration information which captures some basic information about the employer, including:

- Name of the provider
- Address (street, city, county, state, zip)
- FEID number
- Additional information if available (fax, website, primary contact, contact e-mail)

## Associated Procedures:

### I. Search for an employment provider (From the Provider Search Results page)

**CLICK** 'Add Provider'

**ENTER** the provider's phone number (performs a check with the database to ensure that this provider isn't already listed)

**CLICK** the check box to indicate what type of provider you are adding (a provider can be more than one type- for example, both an employment provider and a training provider)

**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, fax and e-mail

**CLICK** 'Save'

**Helpful Tip:**

**Tip 1:** To edit this information, you can also click to access a specific provider from the Employer Search Results page

Service Tracking

111-22-2345 | Roberta Kenyon  
Case Manager Risk Center  
Status: Applicant/Case

PAS: RPA 50  
R/CU: 20000

Home Back Desk Help Help

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.

**Job Participation Rate Entry for ROBERTA KENYON**

[ Enter Job Participation Rate Information ]

Back

Description	Start Date	Hours	11/27/00	12/04/00	12/11/00	12/18/00	12/25/00
CASHIER	12/18/00	30				30	0
Percentage			0 %	0 %	0 %	100 %	0 %

Save Cancel

**Document Key:**

- 100%
- 90%-99%
- 80% and Below
- Not Calculated

**Description:**

The Job Participation percentages displayed are based on the federal requirement of 30 hours per week. For example an individual that records 30 actual, accumulated hours of participation would show a participation percentage of 100%. If the individual records more than 30 actual accumulated hours, percentage rates will exceed 100%. This information is provided as an estimating mechanism for a customer's participation and does not necessarily correspond with the actual federal participation percentages.

\* Required Fields: Information that is required.      ? Information Bubbles: Click on the bubble for specific help.

## Entering customer Job Participation Rates

The Job Participation Rate page is used to capture the hours associated with a customer's countable activities. For each customer's case, this page will be automatically populated with a list of the customer's countable activities. A countable activity will only show up on this page if there has been an Actual Start Date completed on the associated detail page (Activity/Training Detail or Job Placement Detail).

### Associated Procedures: (Navigating from the Case Detail)

#### I. Enter Job Participation Rate Information (Navigating from the Case Detail)

**CLICK** 'Add' on the Job Participation Rate tab

**ENTER** the actual hours that the customer participated in each countable activity (that you have a record for- e.g., pay stub)

**CLICK** 'Save'

**Helpful Tips:**

**Tip 1:** If you go to enter a customer's participation hours on this page, and the activity is not showing up, make sure that you have entered an Actual Start Date for that activity or placement on its detail page.

The screenshot displays the 'Service Tracking' application interface. At the top, there is a header bar with user information: '117-049020 | Tyler Akkes', 'Case Manager: Kimberly Tolosa', 'Status: Open/Nil/Open-UP', 'FAS: T9800', 'SFA: 1021381182101', and 'S/C/S: 2001P80'. A navigation bar includes buttons for Home, Back, Deck, Help, and N/A. A message below the header reads: '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 divided into three sections:

- Current Benefit Information:**

Last Update:	08/29/2000
--------------	------------
- Temporary Cash Information:**

Recurring Benefit Amount:	\$241.00
Earned Income Amount:	\$0.00
Unearned Income Amount:	\$0.00
Category:	ADCR
Category Status:	Open
Sequence Number:	1
Eligibility Status:	Pass
Individual Status:	Eligible or Potentially Eligible Adult
Recurring Benefit Date:	09/01/2000
Eligibility End Date:	
FLORIDA Site Code:	31
- Food Stamp Information:**

Category Status:	Open
Mandatory Work Hours:	Not ABAWD
Recurring Benefit Amount:	\$201.00
Earned Income Amount:	\$0.00
Unearned Income Amount:	\$241.00
Sequence Number:	1
Eligibility Status:	Pass
Individual Status:	Eligible or Potentially Eligible Adult
Recurring Benefit Date:	09/01/2000
Eligibility End Date:	

A left-hand navigation menu is visible, listing various case management options such as 'Open Cases', 'Closed Cases', 'Search Jobs', and 'Reporting'. The 'Benefit Info' link is highlighted.

## Viewing Customer Benefit Information

The Customer Benefit Information page is used to capture Temporary Cash Information and Food Stamp Information for a specific customer. This information is provided by FLORIDA and is delivered in a view-only format.

To view a customer's benefit information, the user must be in the customer's case. To access the benefit information, click the 'Benefit Info' link on the control panel.

### Associated Procedures: (Navigating from the Case Detail)

#### I. View Benefit Information (Navigating from the Case Detail)

**CLICK** the Benefit Info hyperlink on the Control Panel

Service Tracking

323-22-1111 | Tammy Rhoads      PAS:      884  
 Case Manager: Scott Mildenberger      BFA: 00  
 Status: Open/TS/Open-FS      RCV: 104551234      884

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.

Open Cases

- Case at a Glance
- Skill Development
- Plan Development
- Alternative Plan
- Case Notes
- Resumes
- Budget Planner
- Cases To-Do
- Benefit Info
- WIP Inland
- Closed Cases
- Search Jobs
- Active Jobs
- Inactive Jobs
- Search Resumes
- To-Do History
- JPR Search
- Account Info
- Reporting

Eligibility Status: Pending

Individual Status:

Recurring Benefit Date:

Eligibility End Date:

**Food Stamp Reimbursement Request Summary**

Type	Earned Date	Amount	Date Processed	Warrant Date	Warrant Number	Cancel Date
<b>Food Stamp Reimbursement</b>						
* Select Type				<input checked="" type="radio"/> Transportation	<input type="radio"/> Dependent Care	
Earned Date	12/29/2010					
* Amount \$		0.00				
Date Processed						
Warrant Date						
Warrant Number						
Cancel Date						

Save ? Clear Changes ?

\* Required Fields: Information that is required.      ? Information Bubble: Click on the bubble for specific help.

## Requesting Food Stamp Reimbursements for Transportation and Dependent Care

The benefits page for food stamp cases includes an area to request transportation and dependent care reimbursements, accomplished on the FSR screen in WAGES MIS. A reimbursement may be requested each month the customer is eligible to receive food stamps and participates in a countable service or is employed or successfully completes orientation. The transportation reimbursement can be requested one time per earned month for a maximum amount of \$25.00.

Dependent care reimbursements can be requested for eligible dependents of the customer as follows:

- For each child in the assistance group below the age of 2, a maximum of 200.00 may be requested per earned month
- For each child in the assistance group age 2 and older, a maximum of \$175.00 may be requested per earned month

**Associated Procedures: (Navigating from the Case Detail)**

**I. Request Transportation/Dependent Care Reimbursement (Navigating from the Case Detail)**

**CLICK** the Benefit Info hyperlink on the Control Panel

**SELECT** Transportation or Dependent Care as the type of reimbursement being requested

**SELECT** the earned date

**ENTER** the requested amount

**CLICK** the 'Save' button to submit the request

Completing these steps commits the request to a batch interface that runs with the Comptroller on the first and third Wednesday of each month. In the time span between the date a request is made and the first of third Wednesday of the month (whichever occurs first), a reimbursement request may be cancelled.

**Service Tracking** 777-77-7778 | Jane Smith PAF: Case Manager: Scott Milderberger BFA: 002 Status: Denied/Applicant/Opes-FS RUC/S: 2/12/2011

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.

Employer End Date: 09/12/2000  
FLORIDA Site Code: 12

**Food Stamp Information**

Category Status:	Denied
Mandatory Work Hours:	35
Recurring Benefit Amount:	\$180.00
Earned Income Amount:	\$888,700.00
Unearned Income Amount:	\$12,300.00
Sequence Number:	4
Eligibility Status:	Pass
Individual Status:	Eligible or Potentially Eligible Adult
Recurring Benefit Date:	10/10/1990
Eligibility End Date:	09/23/2000

**Food Stamp Reimbursement Request Summary**

Type	Earned Date	Amount	Date Processed	Warrant Date	Warrant Number	Cancel Date
<a href="#">I</a>	07/1992	\$10.00	12/27/2000		7000041	
<a href="#">I</a>	10/2000	\$25.00	12/27/2000		7000021	
<a href="#">I</a>	11/2000	\$2.00	12/05/2000		3000001	
<a href="#">I</a>	12/2000	\$15.00	12/27/2000		7000001	12/26/2000

\* **Required Fields:** Information that is required. **Information Bubbles:** Click on the bubble for specific help.

## II. Canceling a Previously Requested Transportation/Dependent Care Reimbursement (Navigating from the Case Detail)

**CLICK** the Benefit Info hyperlink on the Control Panel

**CLICK** the record you wish to cancel the request, (T) Transportation or (D) Dependent Care

**SELECT** a cancel date


**CLICK** the 'Save' button

**NOTE:** The date processed, warrant date and warrant number fields will be populated by OSST once a return batch interface is received from the Comptroller as reimbursement requests are processed.



**MyFloridaJobs.com**

**Activity: Using OSST for Tracking Activity**



**Scenarios:**

- **Adding a Skill Development activity**
- **Adding Training/Activity Provider Detail**
- **Adding Training/Activity Program Detail**
- **Creating a customer placement**
- **Adding Employer Detail**
- **Creating JPR entries**
- **Viewing Benefit Information**

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:

- Adding a Skill Development activity (includes searching for a provider)
- Add/Edit/View Training/Activity Provider Detail
- Add/Edit/View Training/Activity Program Detail
- Create a Customer Placement
- Add/Edit/View Employer Detail
- Create JPR entries
- View Benefit Information
- Request a Transportation and Dependent Care Reimbursement (FSET Only)

Questions?

