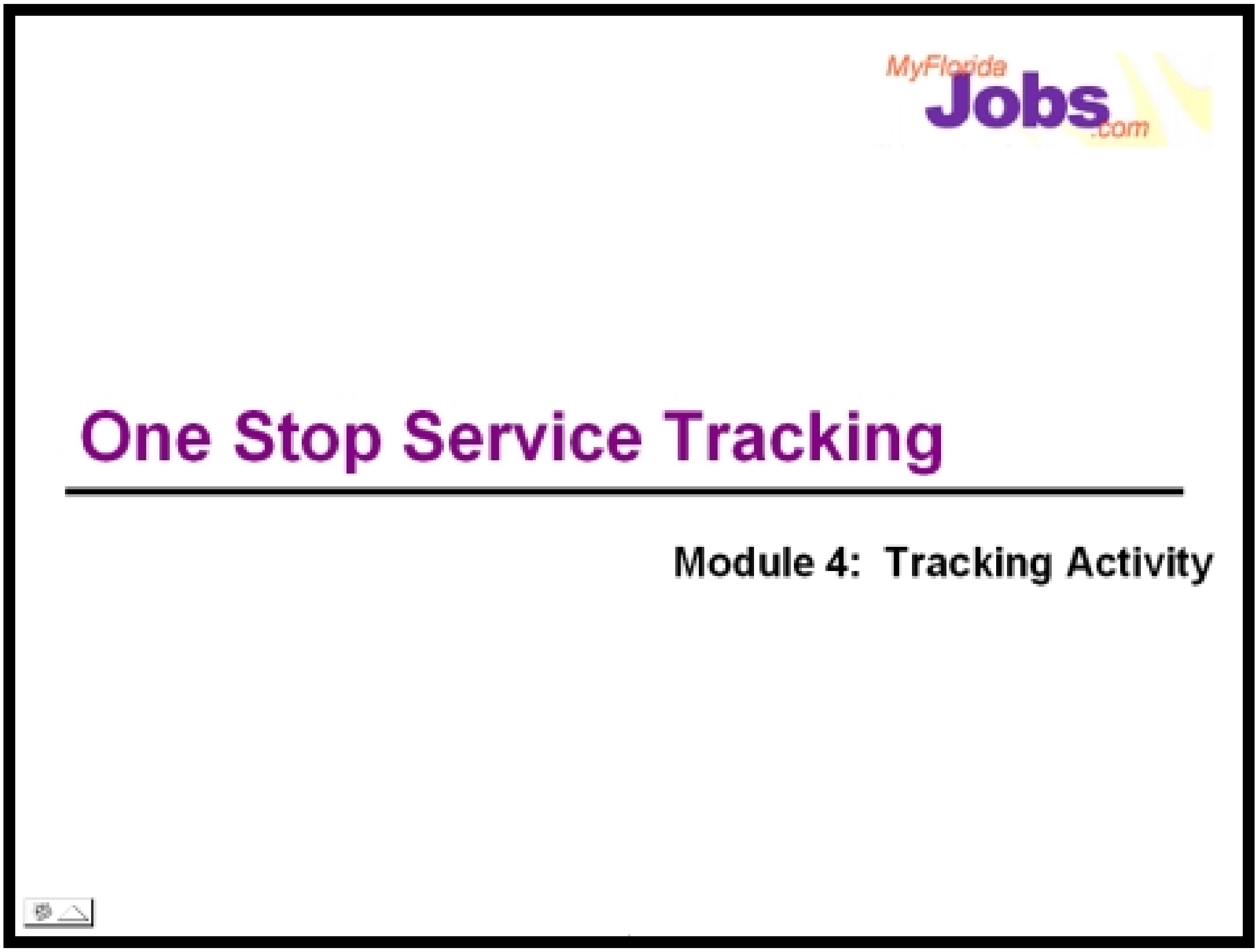
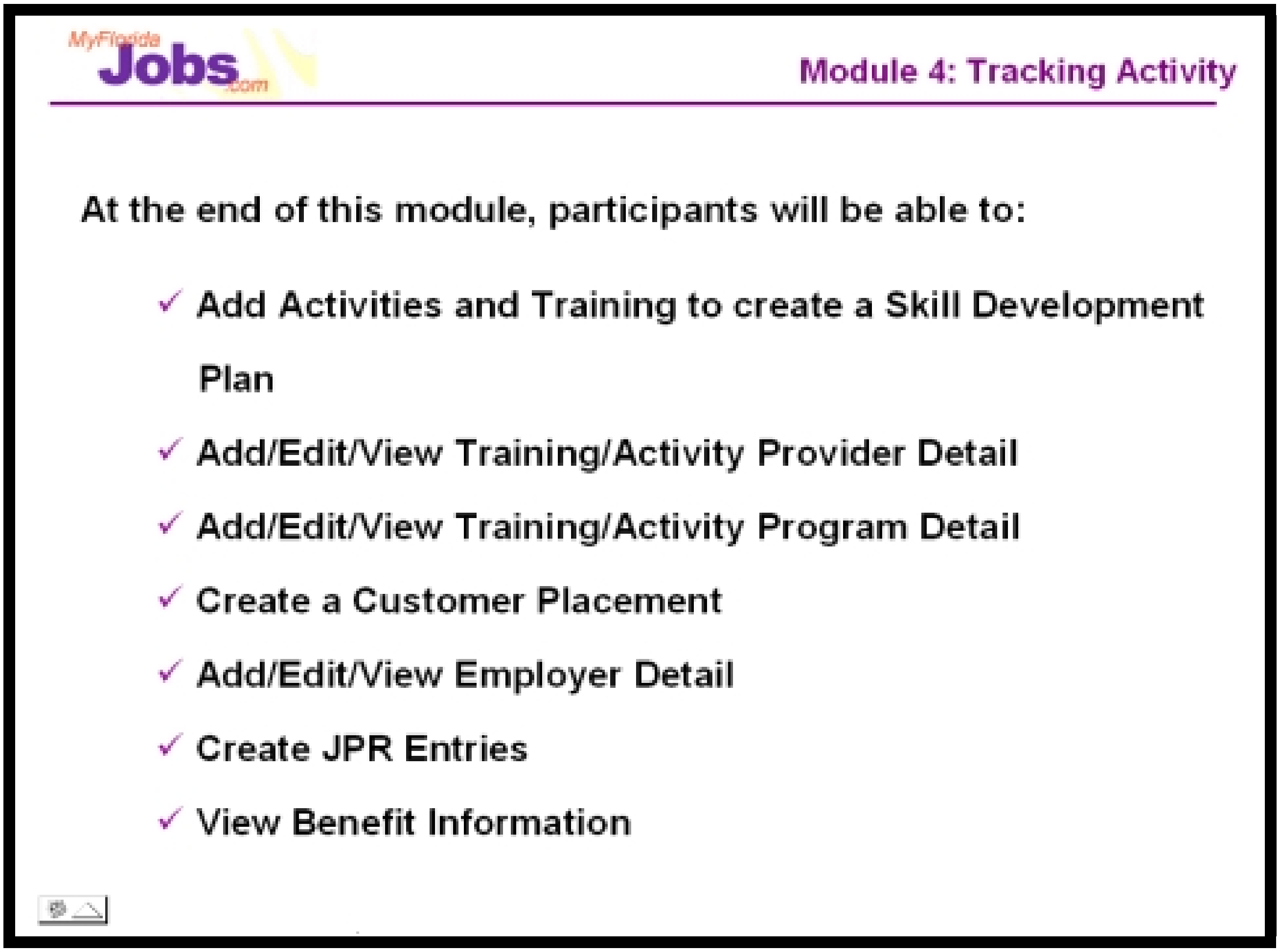


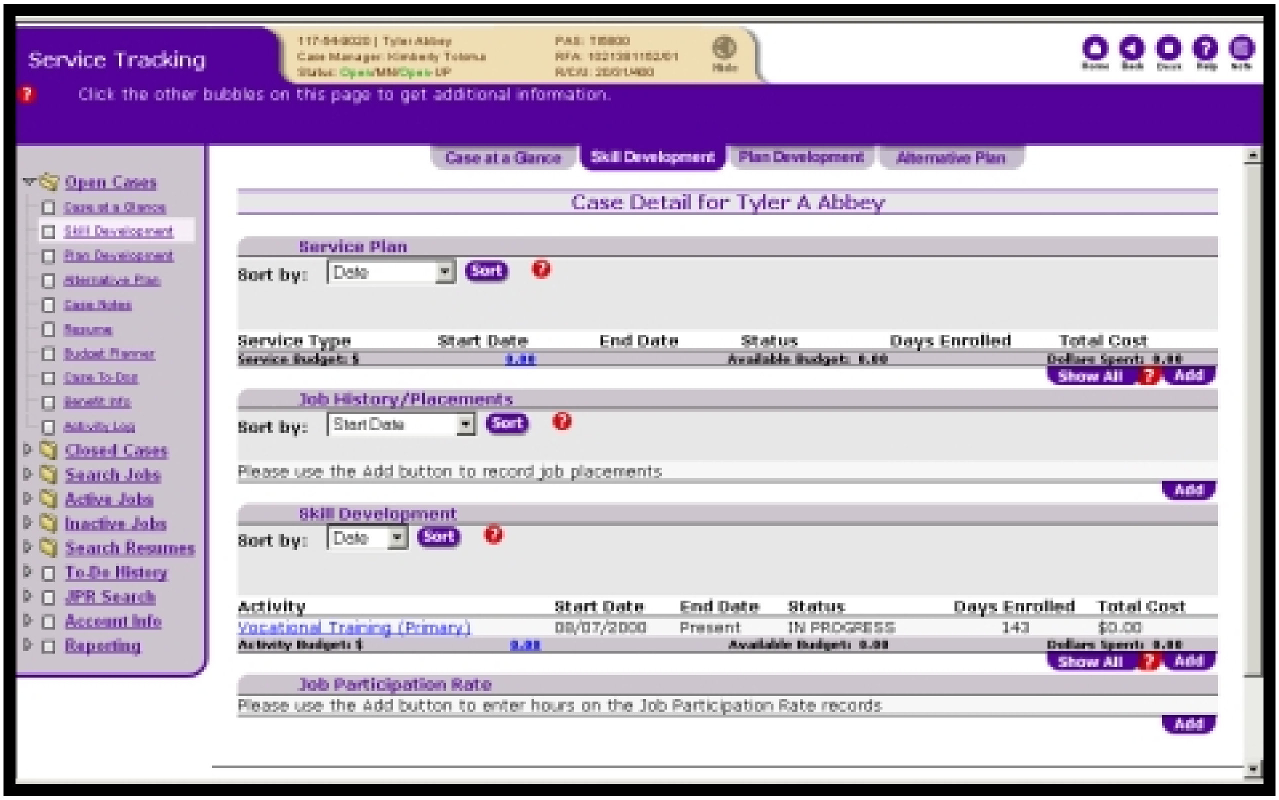
Introduction to Module 4: Tracking Activity

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



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



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

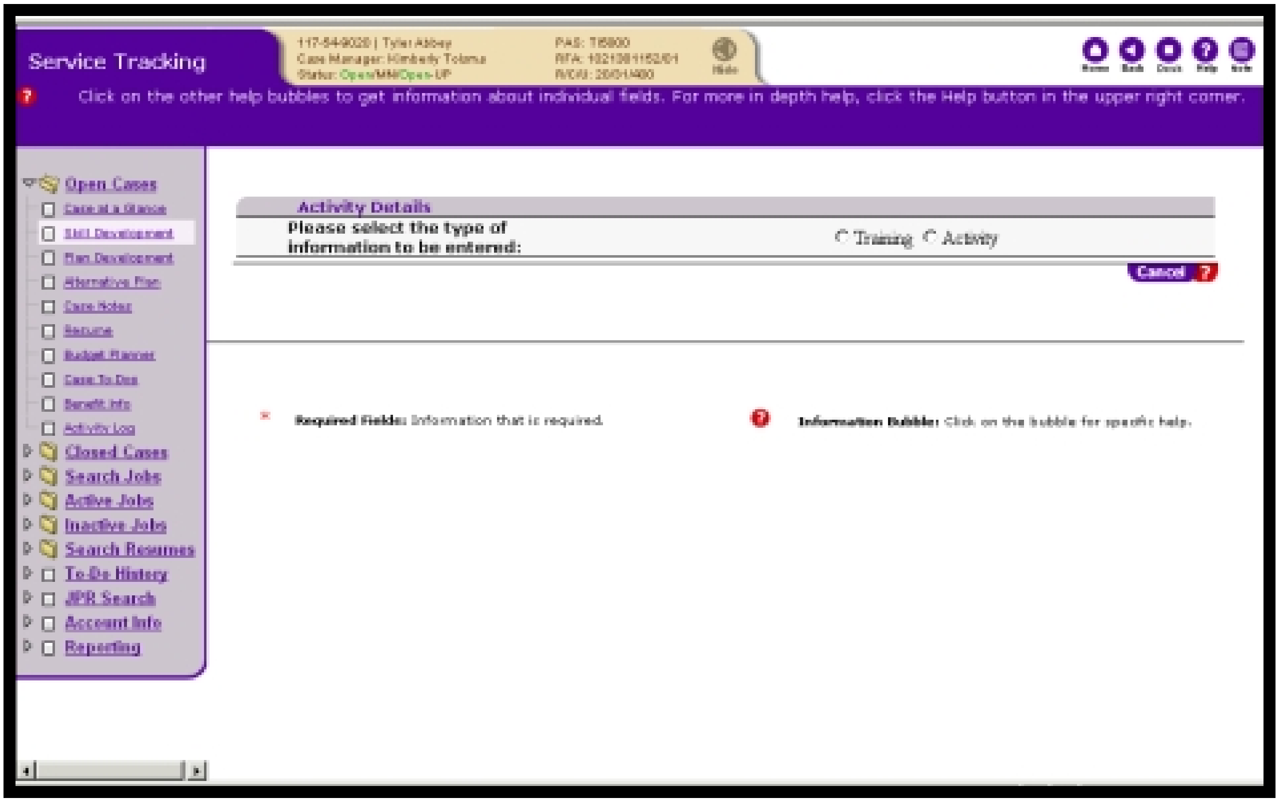
The Skill Development tab provides you with a starting point to do several things, including:

- 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.

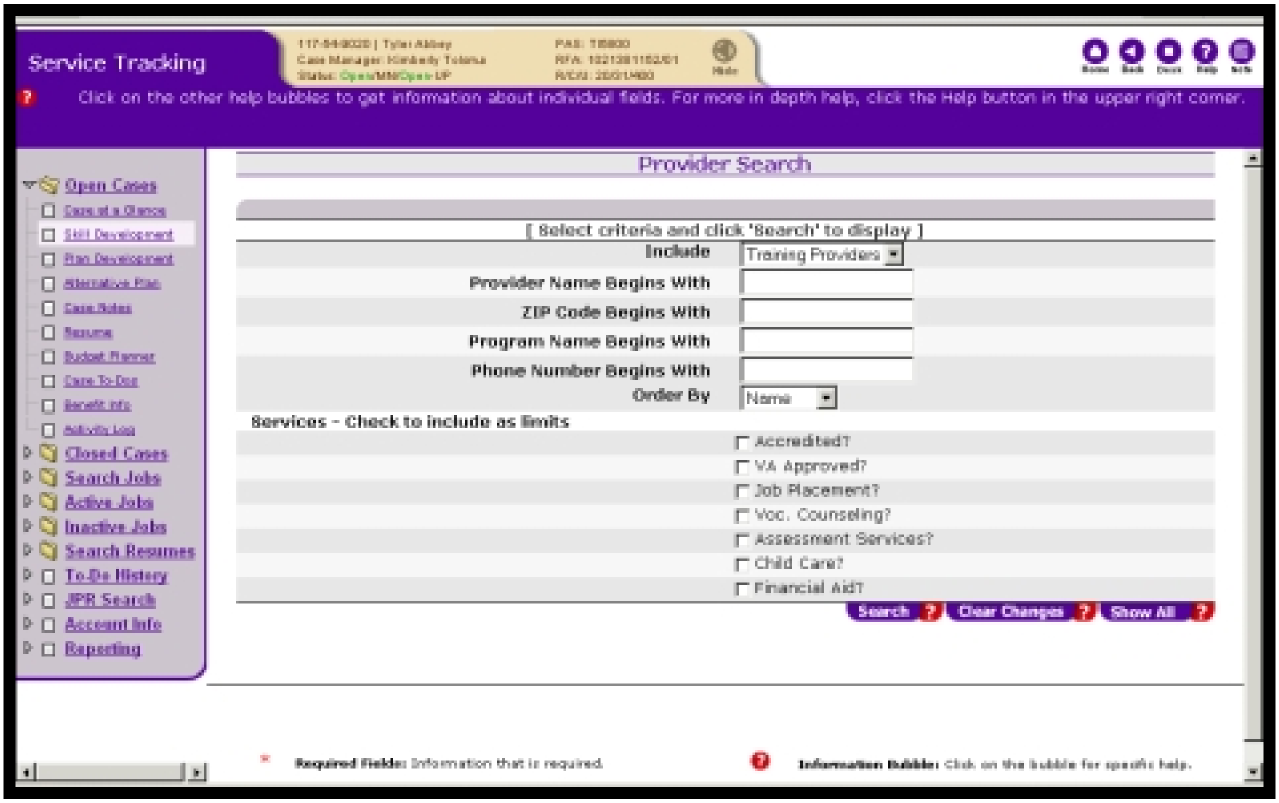
Once skill development activities have been added to the customer’s case, the Skill Development tab defaults to show a view of the customer’s “In Progress” skill development activities, including:

- 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

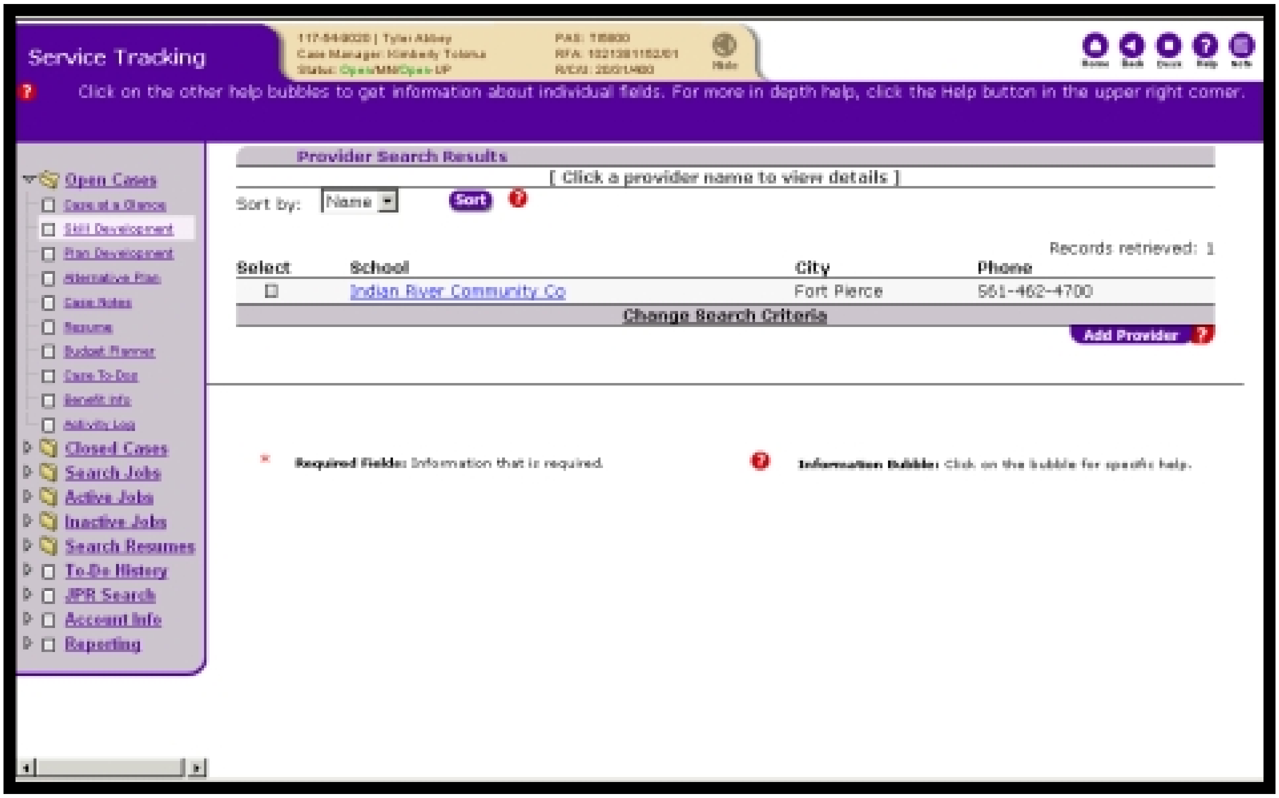
Adding training begins with the Skill Development Plan tab. Clicking the ‘Add’ button will prompt the user to choose whether to add a training record or an activity record to the customer’s case.



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



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:

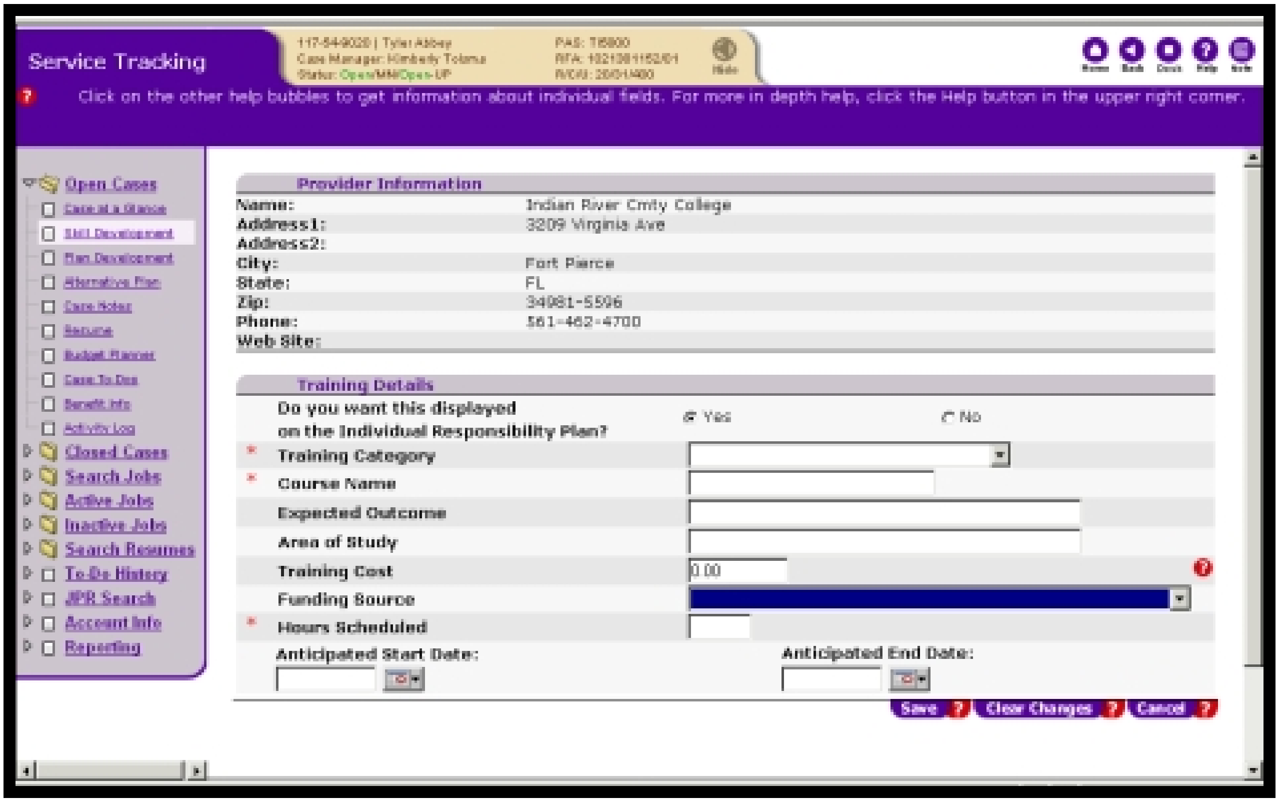
- Click the ‘Select’ icon to add the provider directly to a training record for the customer
- Click the provider’s hyperlink to view provider details
- View the city where the provider is located
- View the provider’s phone number
- Click to add a provider (if the user does not find the provider he/she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



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:

<u>I. Add Training</u>

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

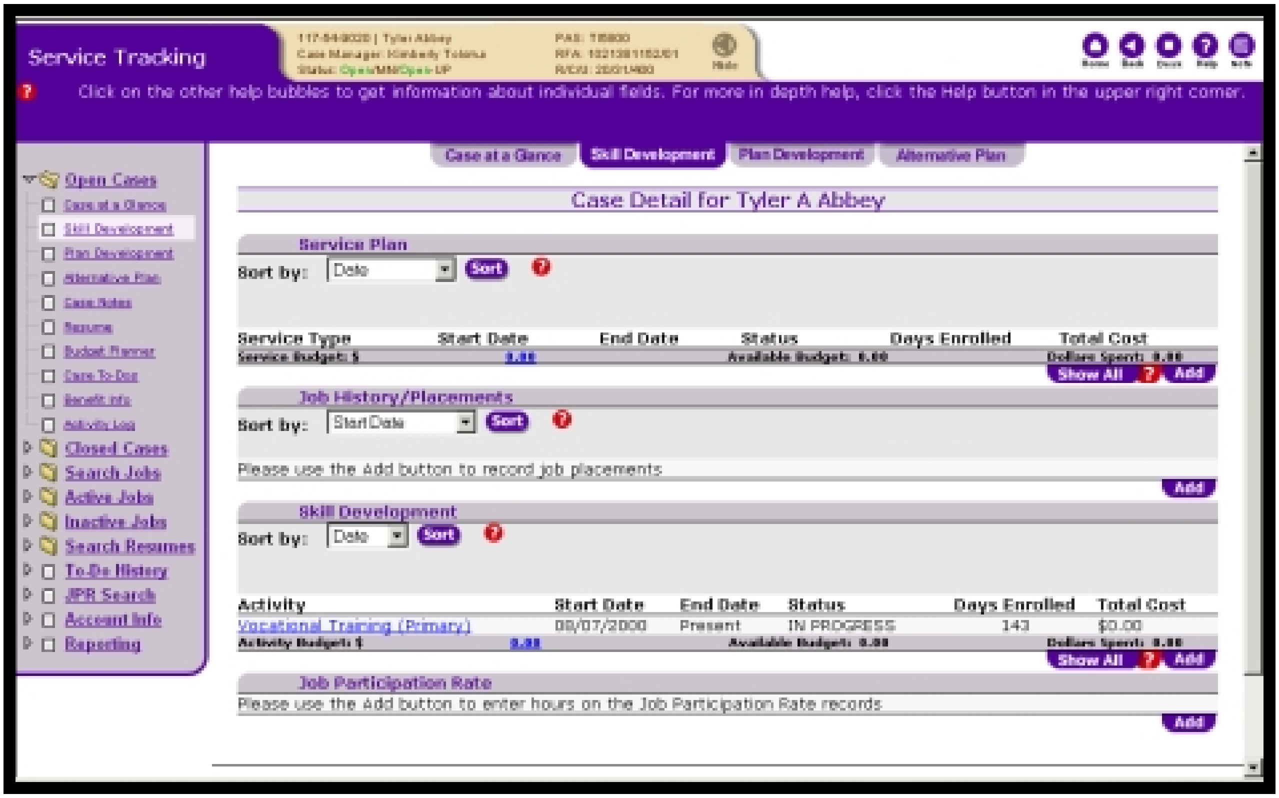
ENTER the total cost of the activity

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’



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:

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

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

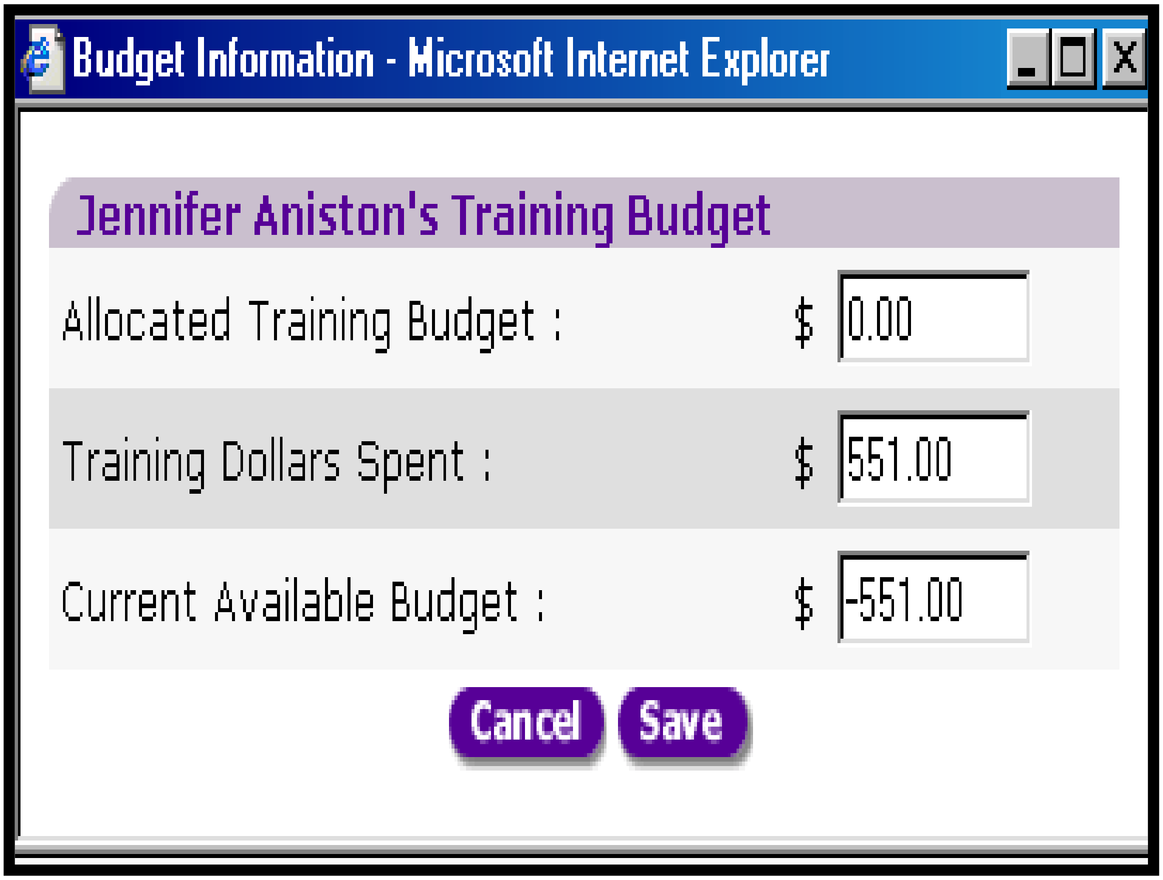
SELECT the reason for the training ending from the 'Reason for Course Ending' drop down list

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

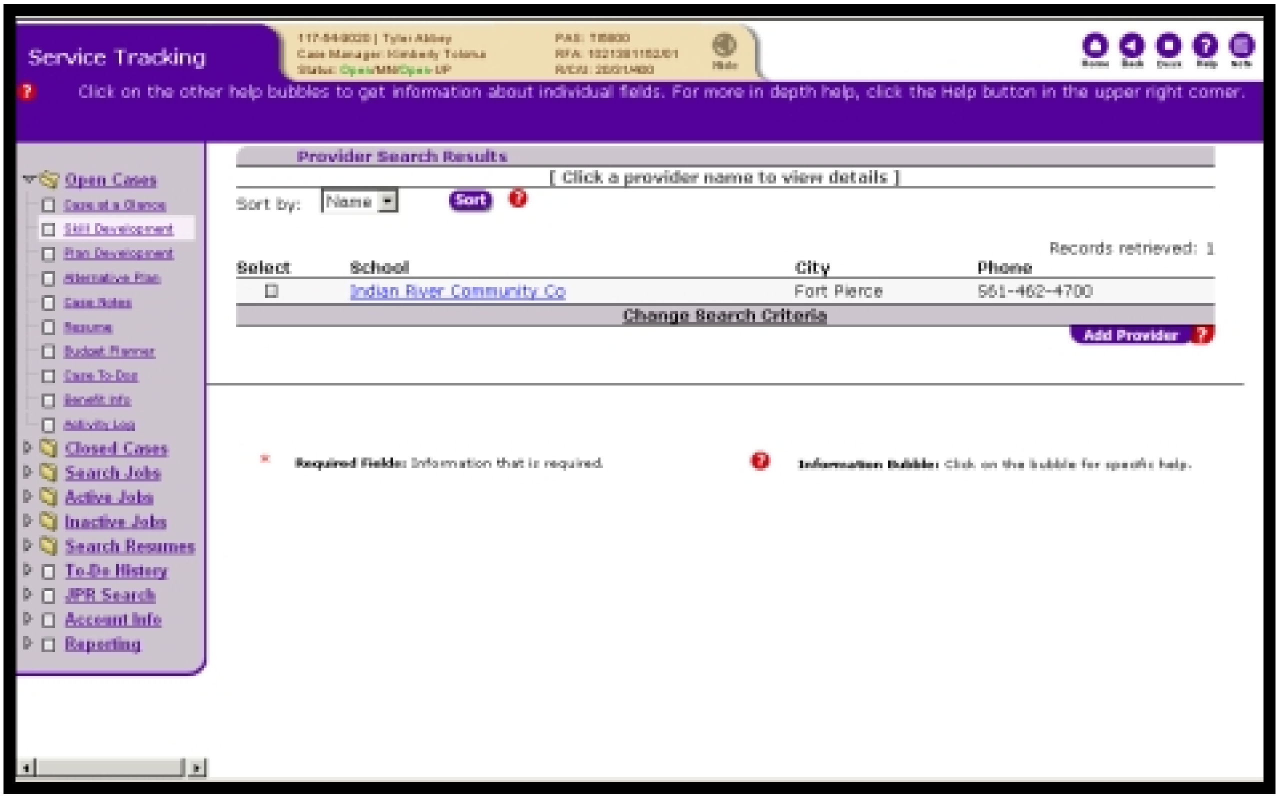
ENTER the actual end date

CLICK 'Save'



Adding a Budget

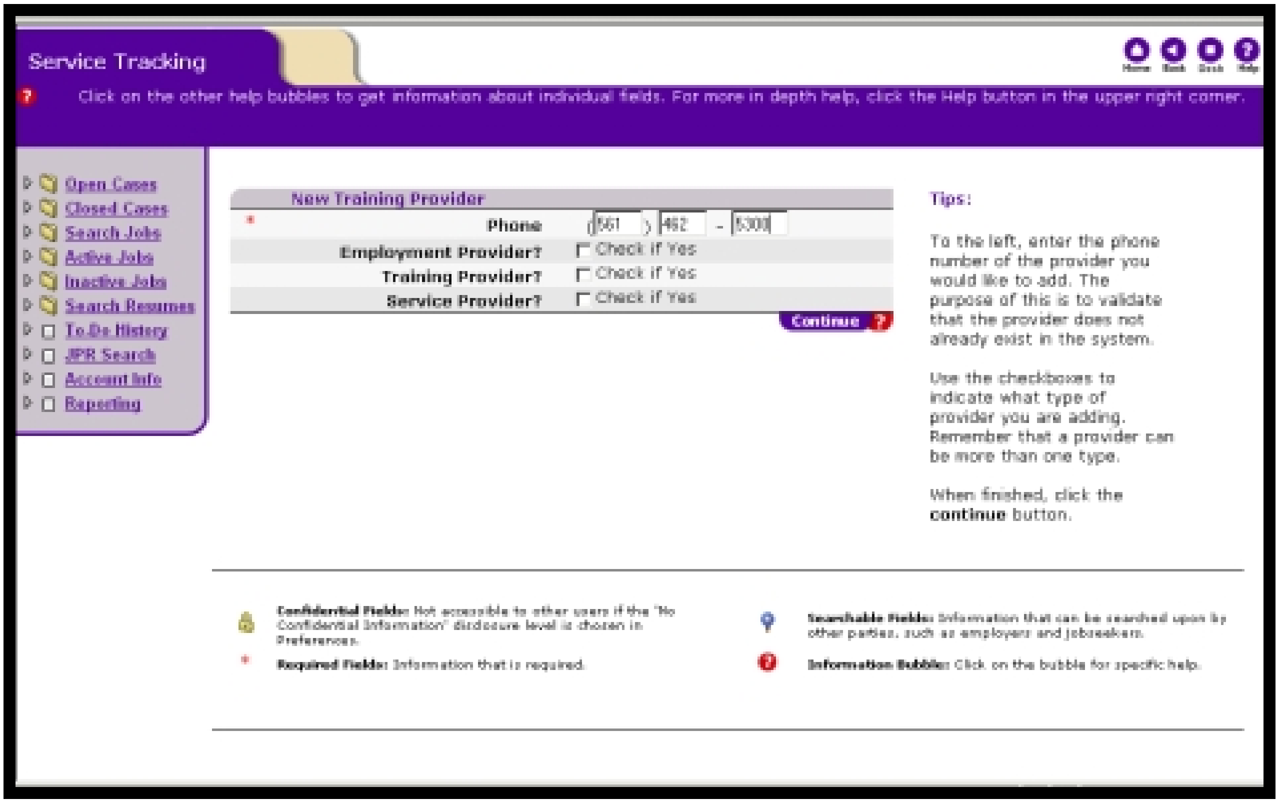
To add/edit a customer's available budget, simply click the hyperlink next to 'Activity Budget.' Clicking this will prompt the user with a pop up box to enter the customer's allocated activity budget.



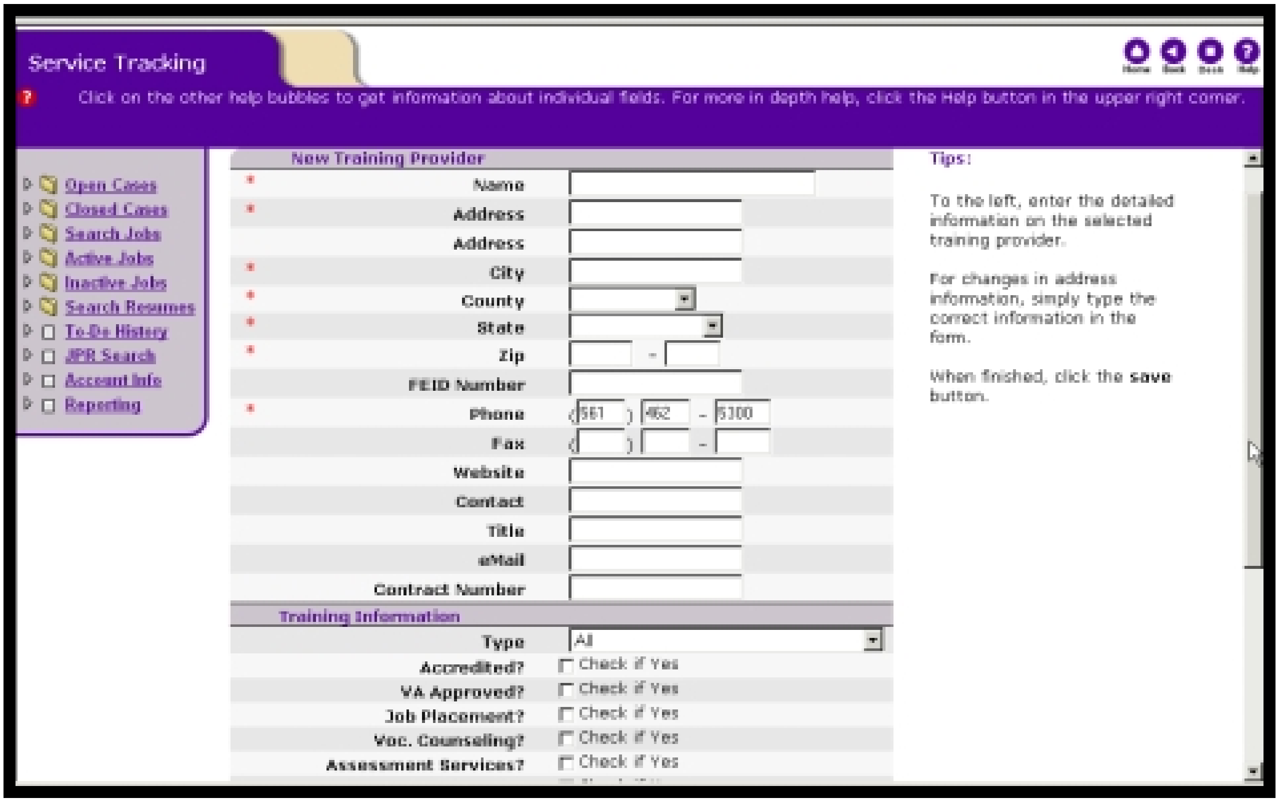
Adding a Provider

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.



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.



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

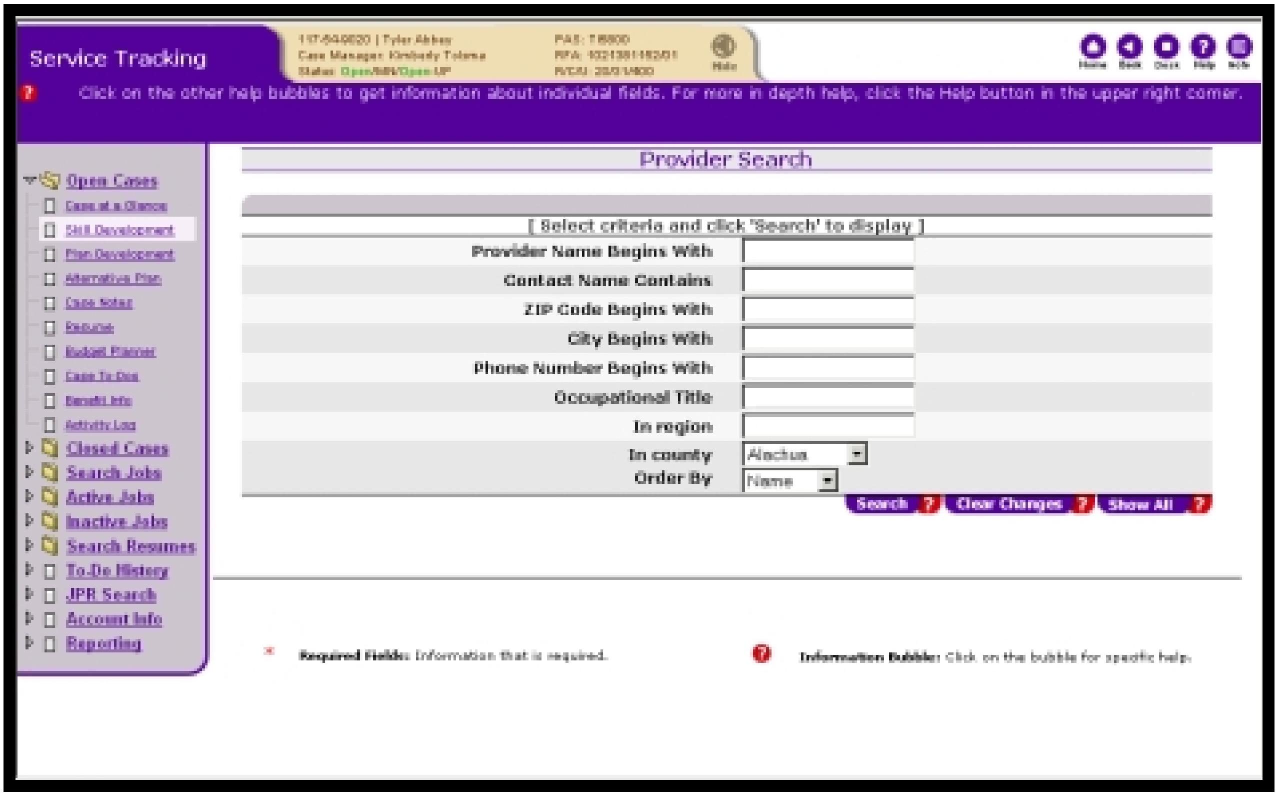
ENTER a program description

ENTER the total cost of the program (tuition)

ENTER the clock hours for the program

ENTER the credit hours for the program

CLICK ‘Save’



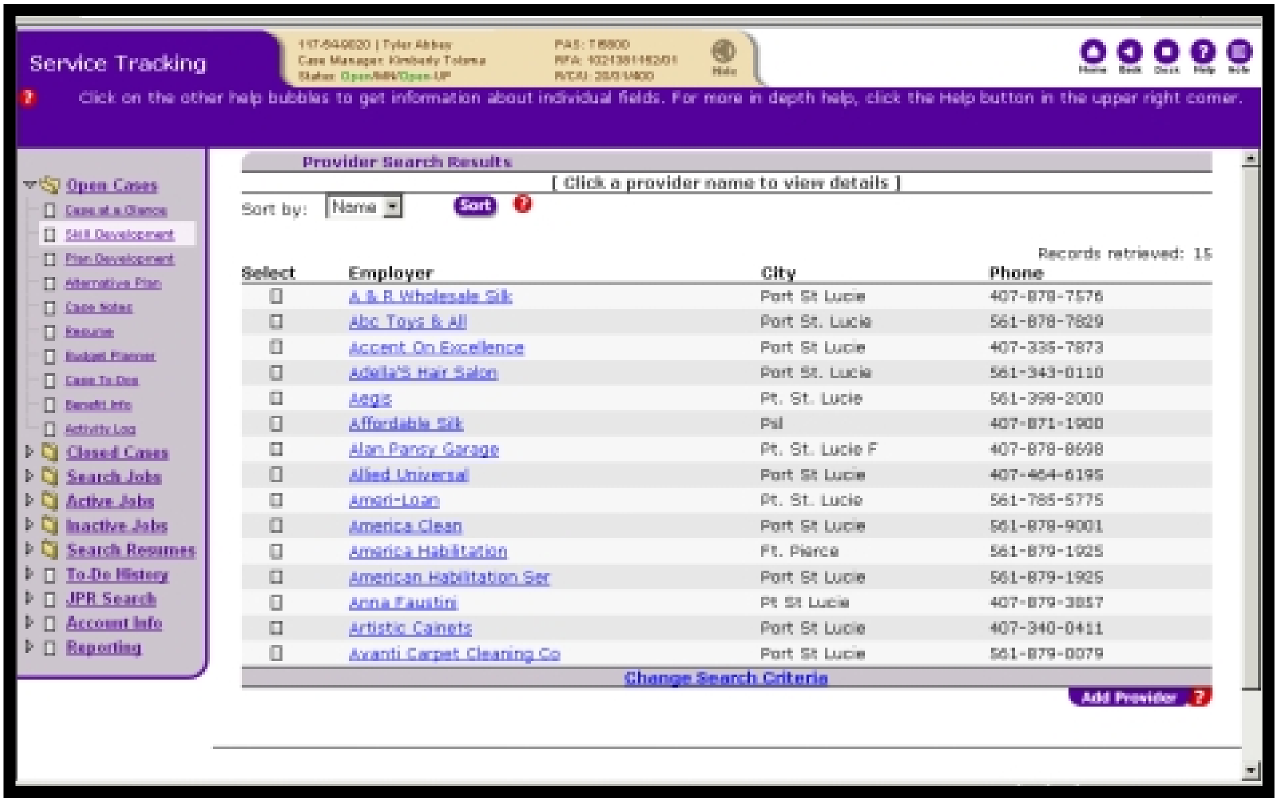
Adding a customer placement

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



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.

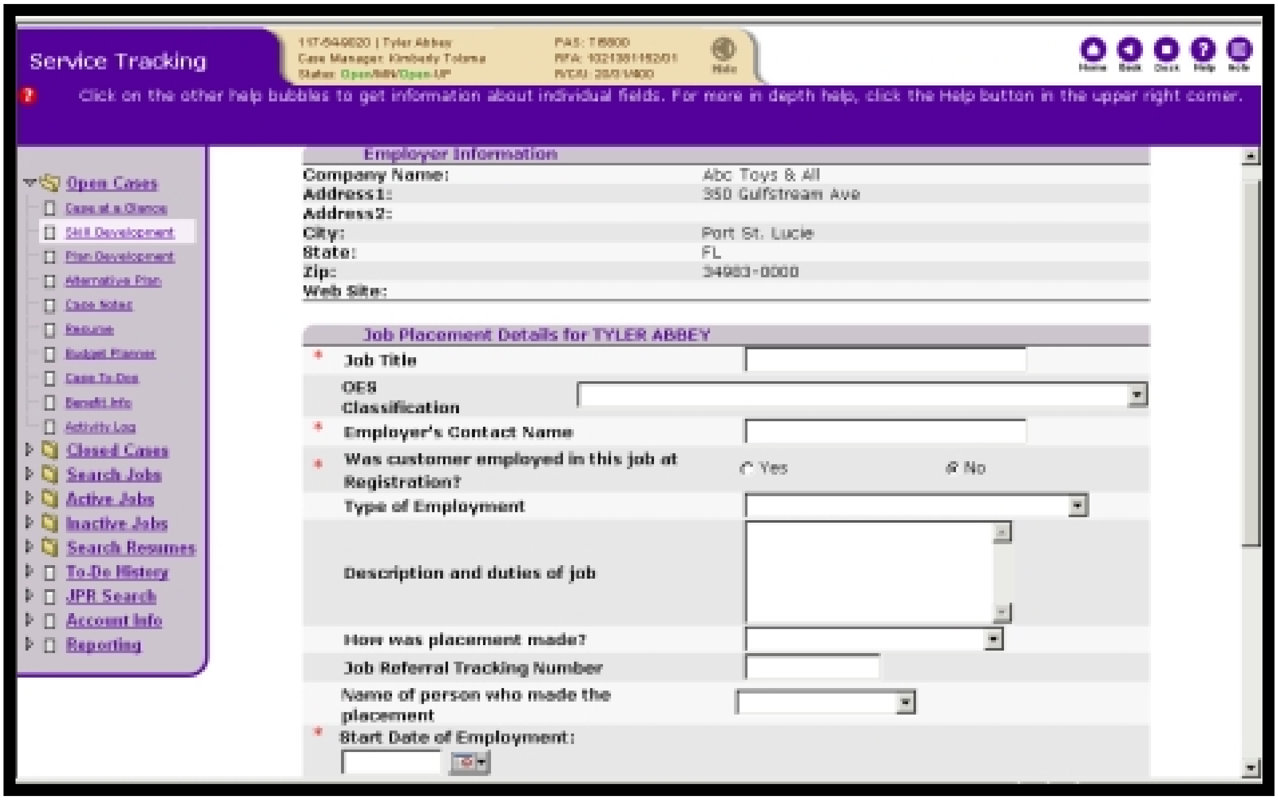
Associated Procedures: (Navigating from the Case Detail)

<u>I. Search for an employment provider</u>

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’



Associated Procedures:

<u>I. Create placement detail (From the employer provider search results)</u>

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

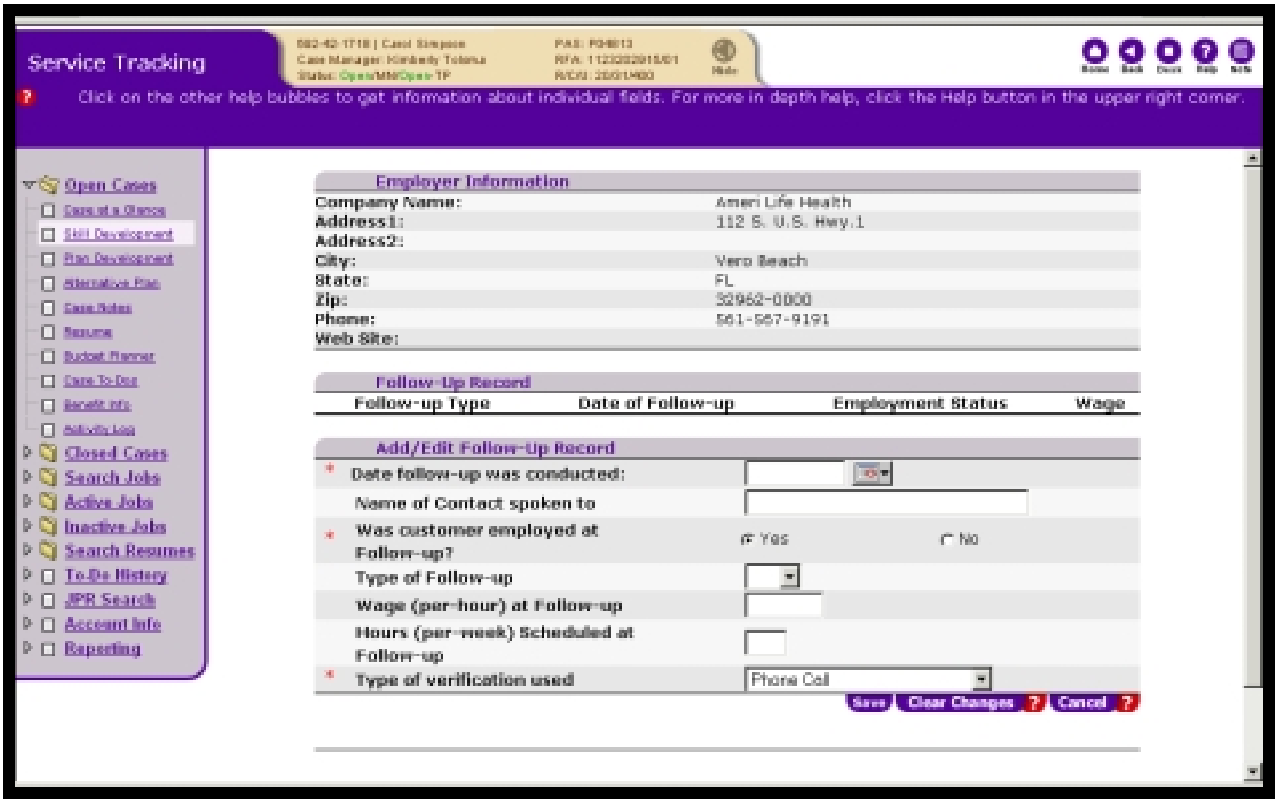
ENTER the customer's starting wage

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'



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

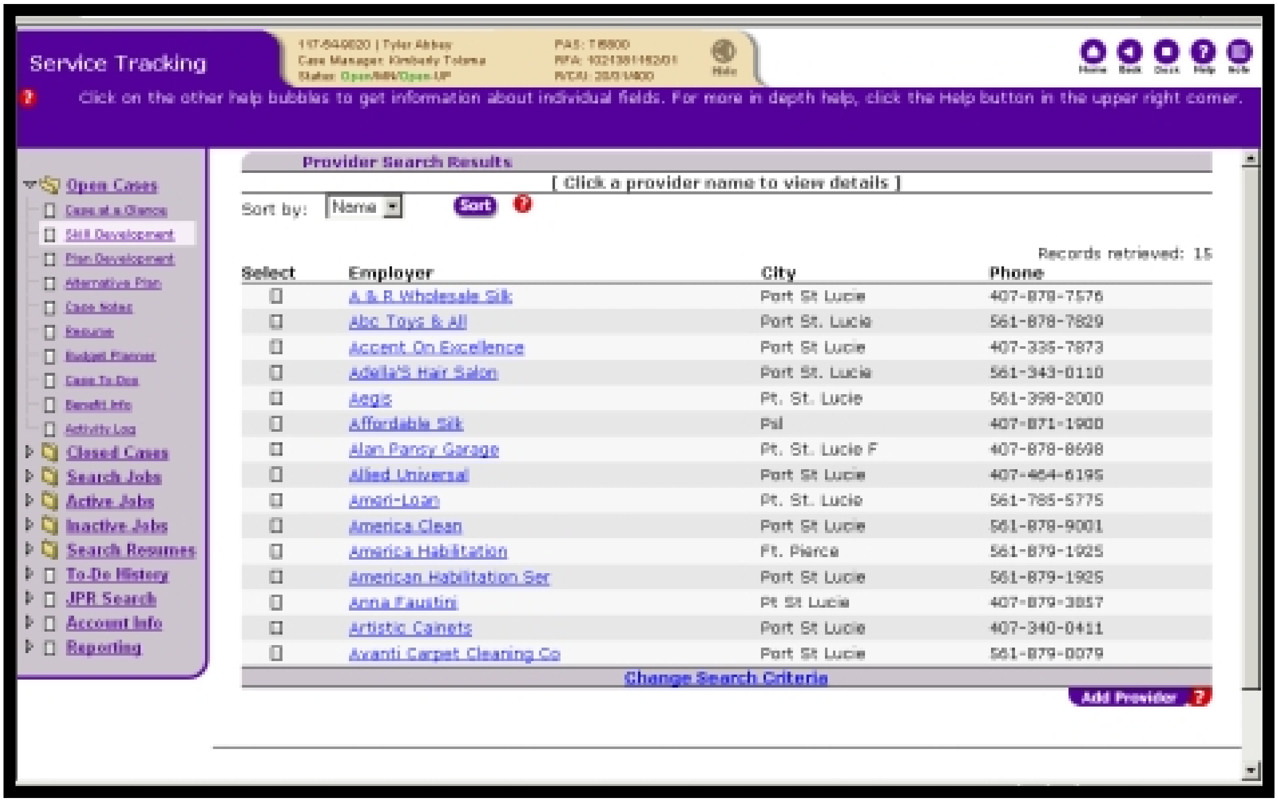
SELECT the type of follow-up from the drop down list

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)

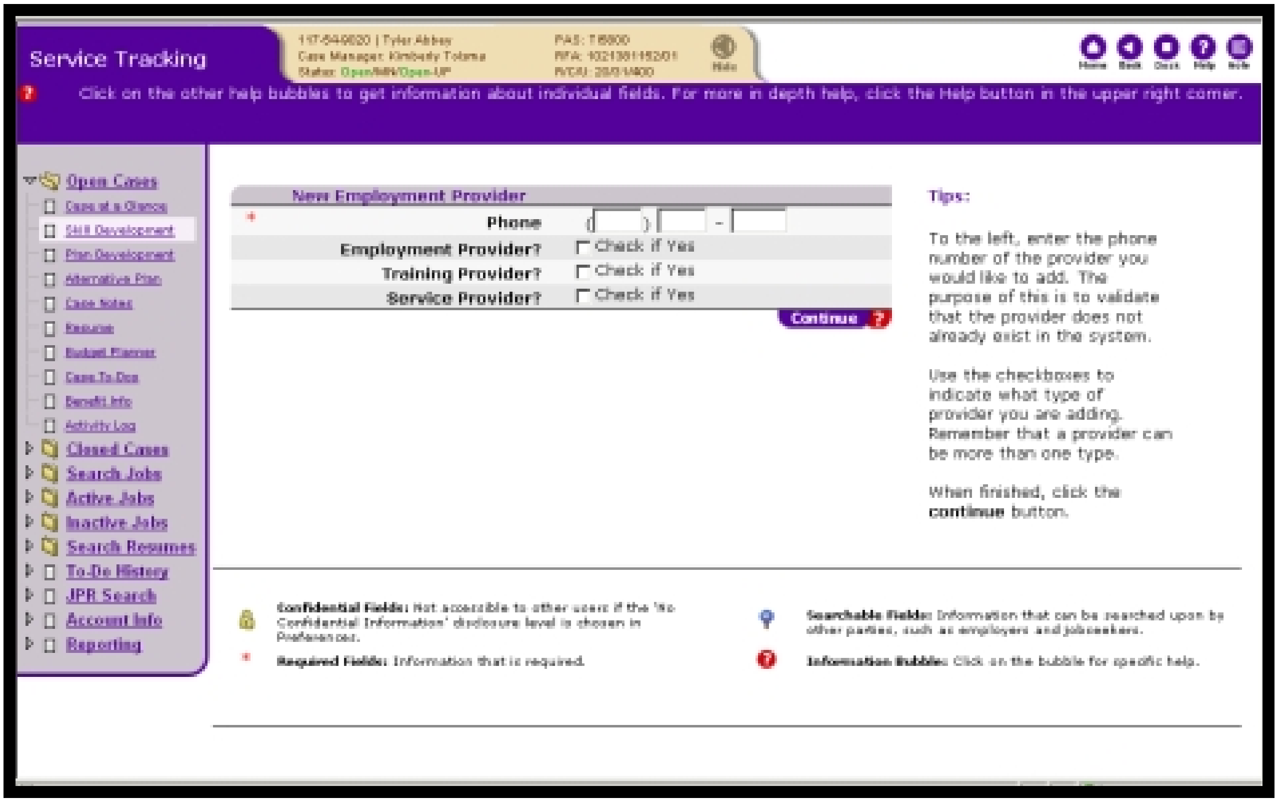
CLICK 'Save'



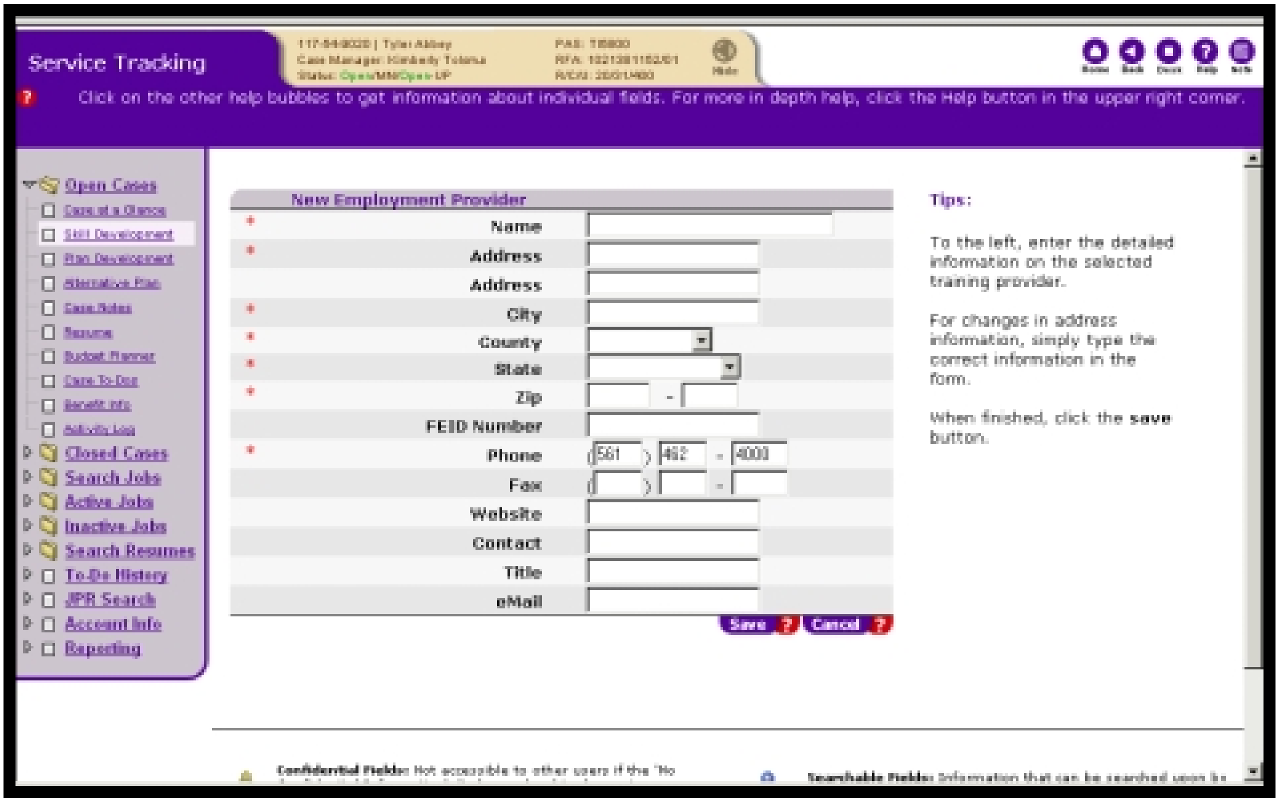
Adding an Employer

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 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.



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

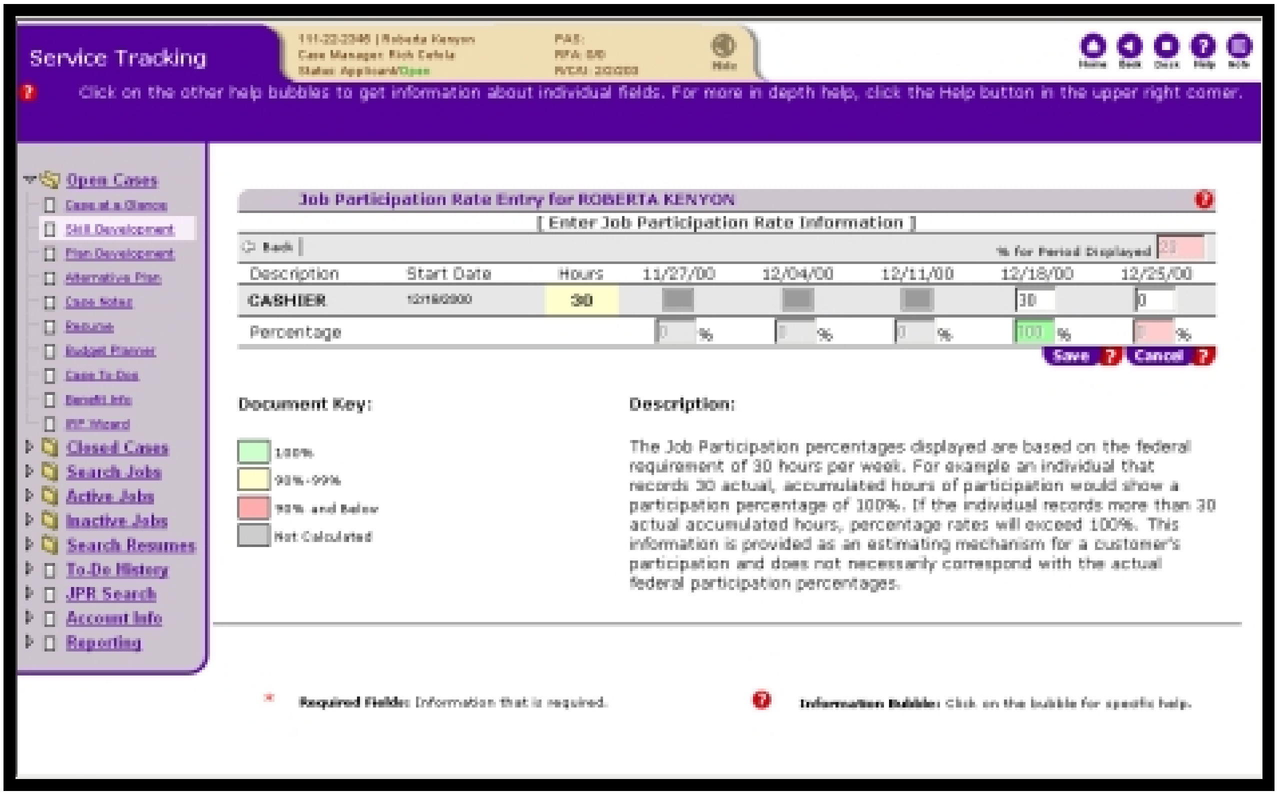
ENTER the provider's address (city, county, state and zip)

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



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 activitiy will only show up on this page if there has been an <u>Actual Start Date</u> completed on the associated detail page (Activity/Training Detail or Job Placement Detail).

Associated Procedures: (Navigating from the Case Detail)

<u>I. Enter Job Participation Rate Information (Navigating from the Case Detail)</u>

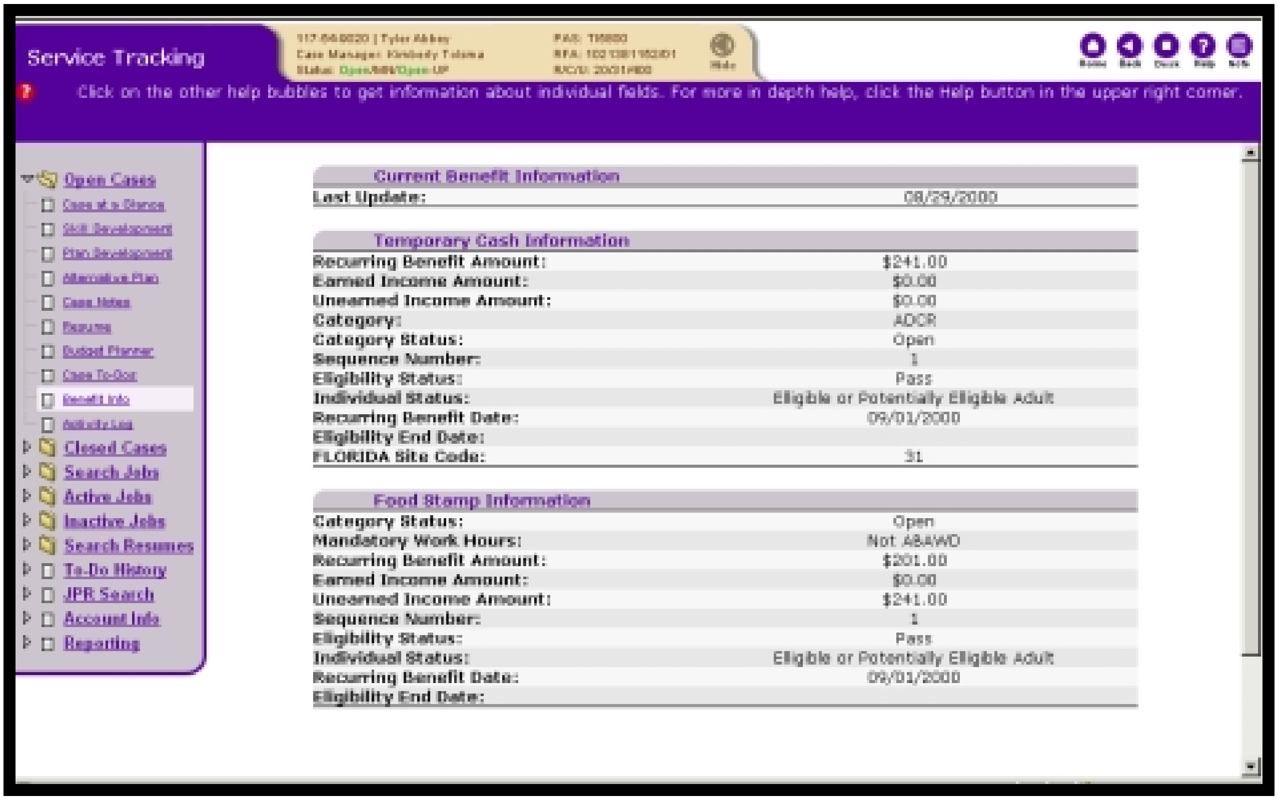
CLICK 'Add' on the Job Participation Rate tab

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.



Viewing Customer Benefit Information

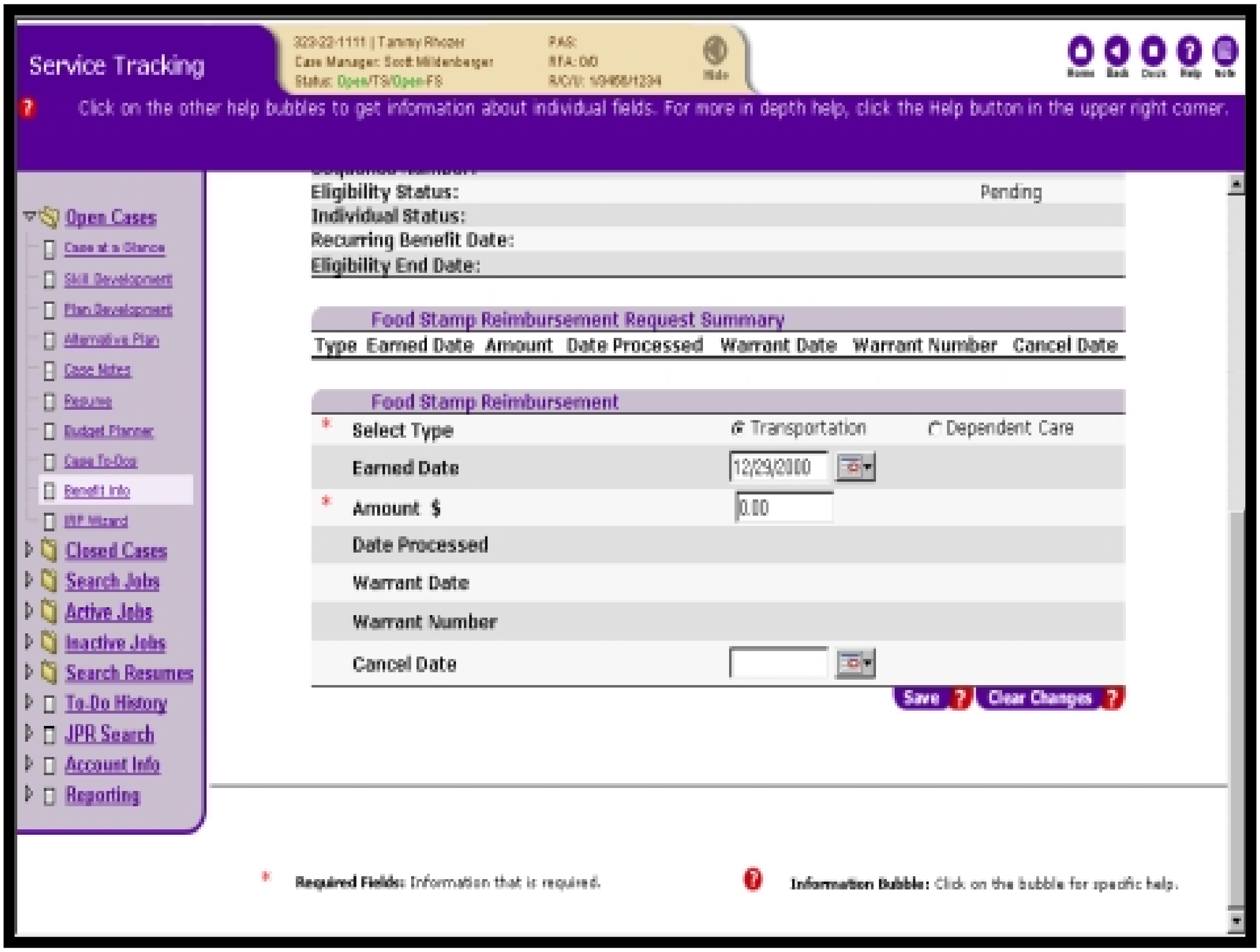
The Customer Benefit Information page is used to capture Temporary Cash Information and Food Stamp Information for a specific customer. This information is provided by FLORIDA and is delivered in a view-only format.

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)

<u>I. View Benefit Information (Navigating from the Case Detail)</u>

CLICK the Benefit Info hyperlink on the Control Panel



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

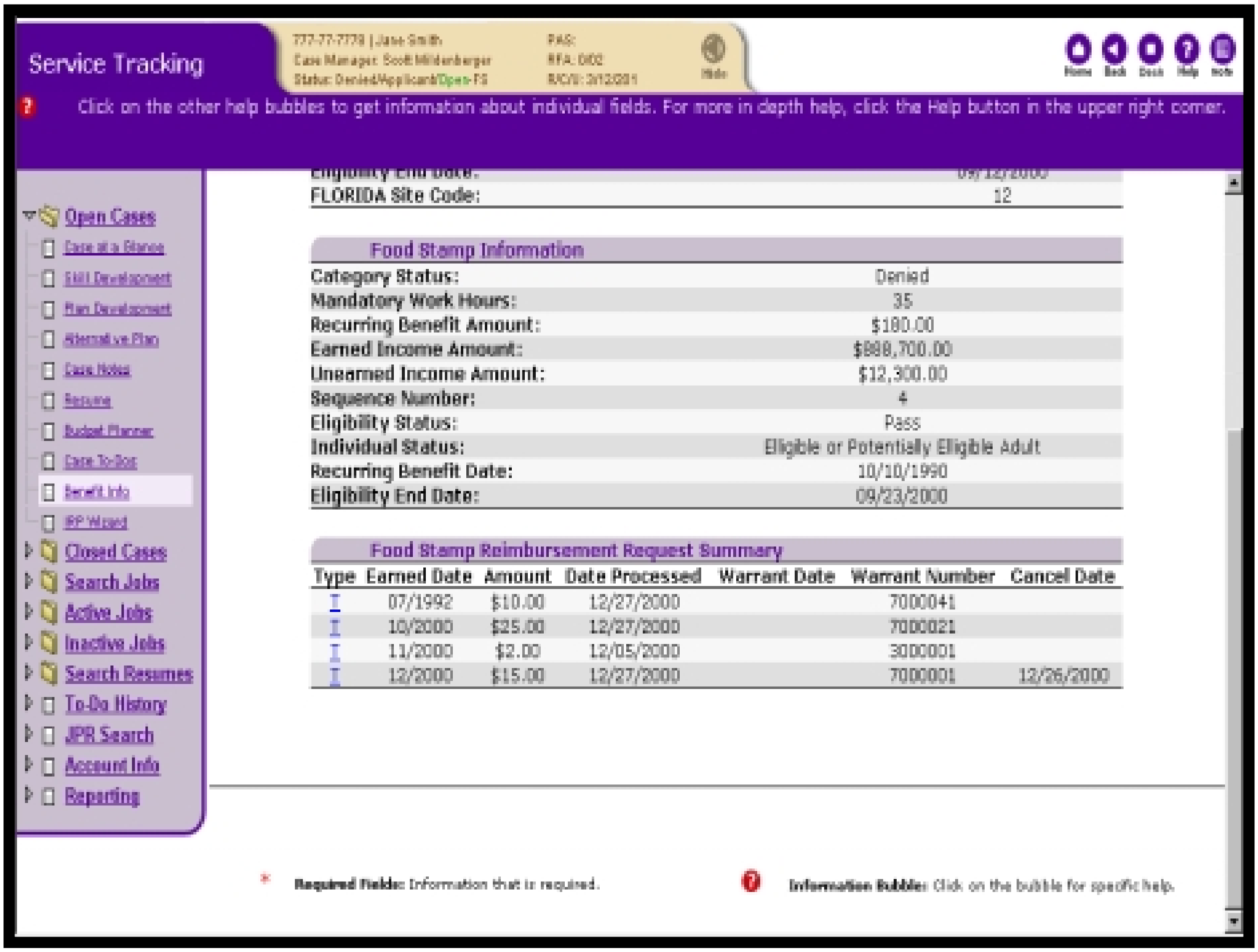
SELECT Transportation or Dependent Care as the type of reimbursement being requested

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.



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

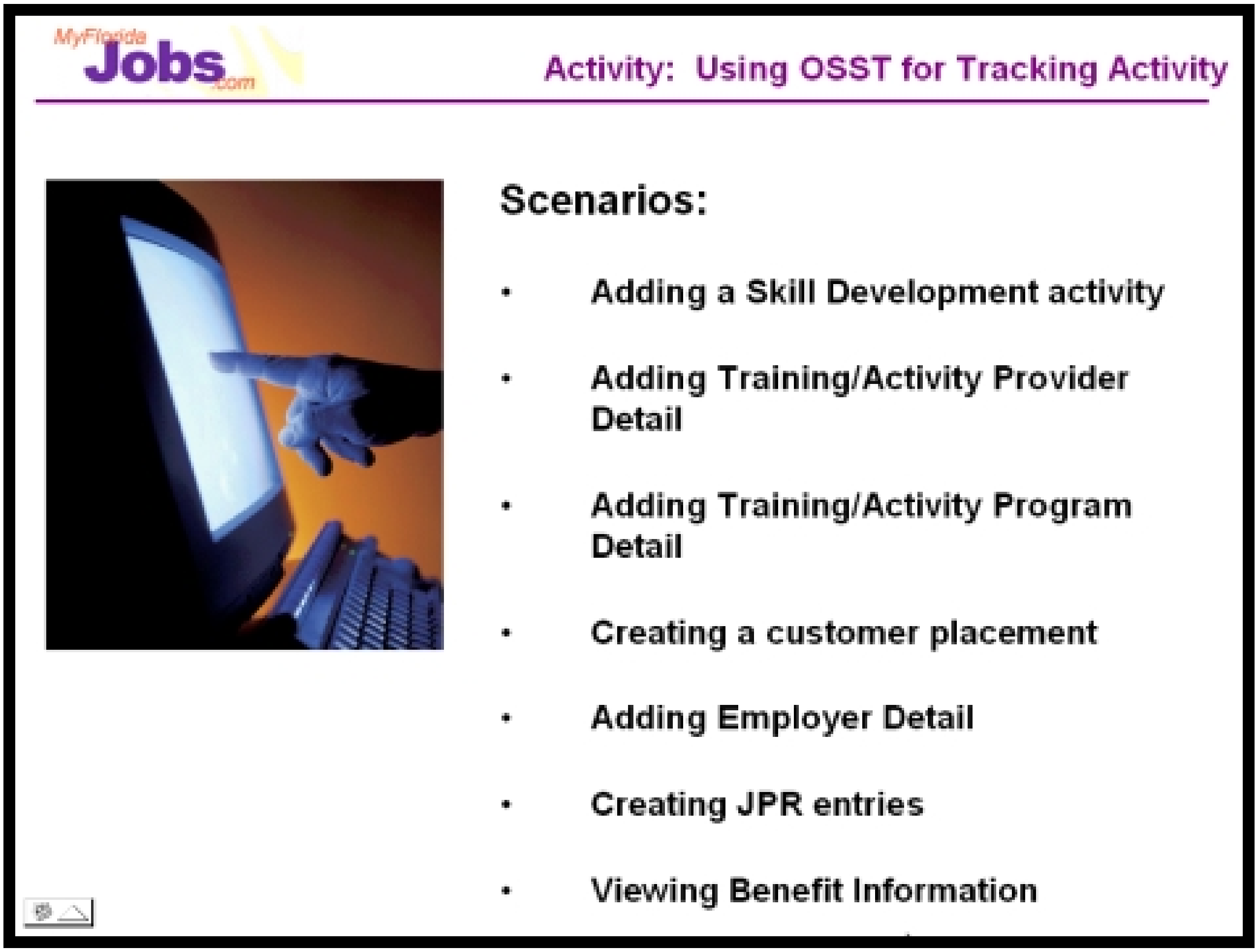
CLICK the Benefit Info hyperlink on the Control Panel

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

SELECT a cancel date

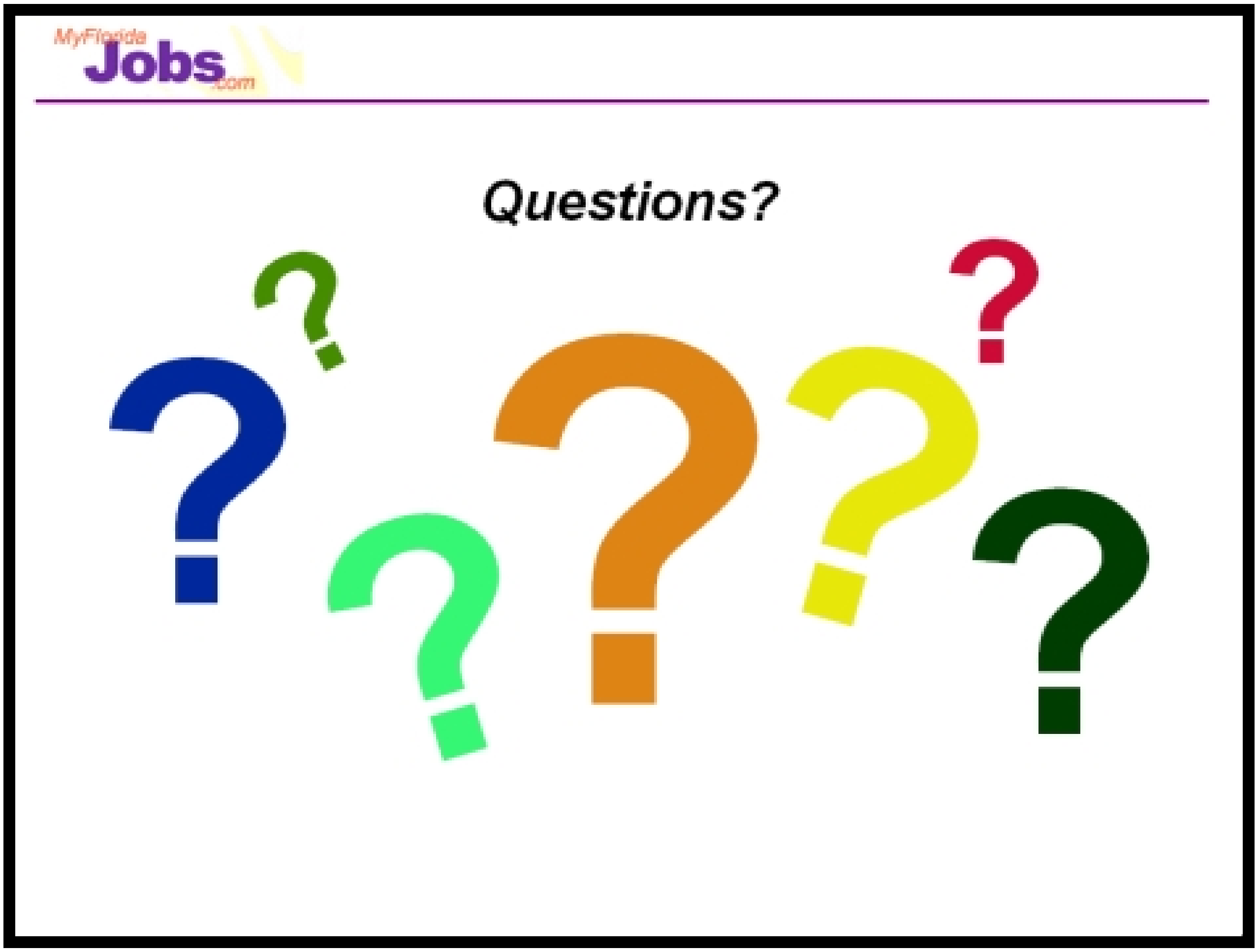
CLICK the 'Save' button

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.



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)


Jobs
Questions?