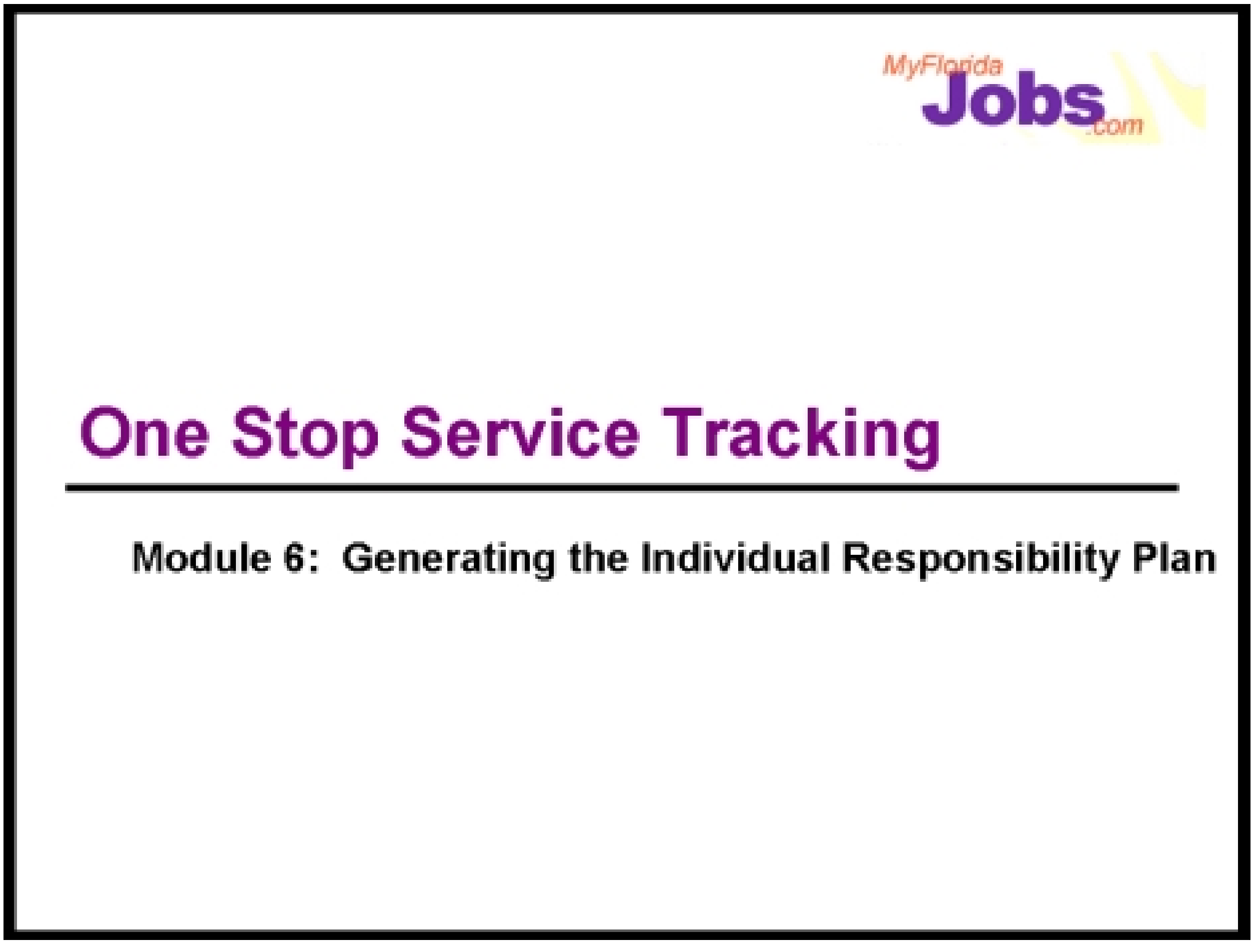


Introduction to Module 6: Generating the Individual Responsibility Plan

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

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

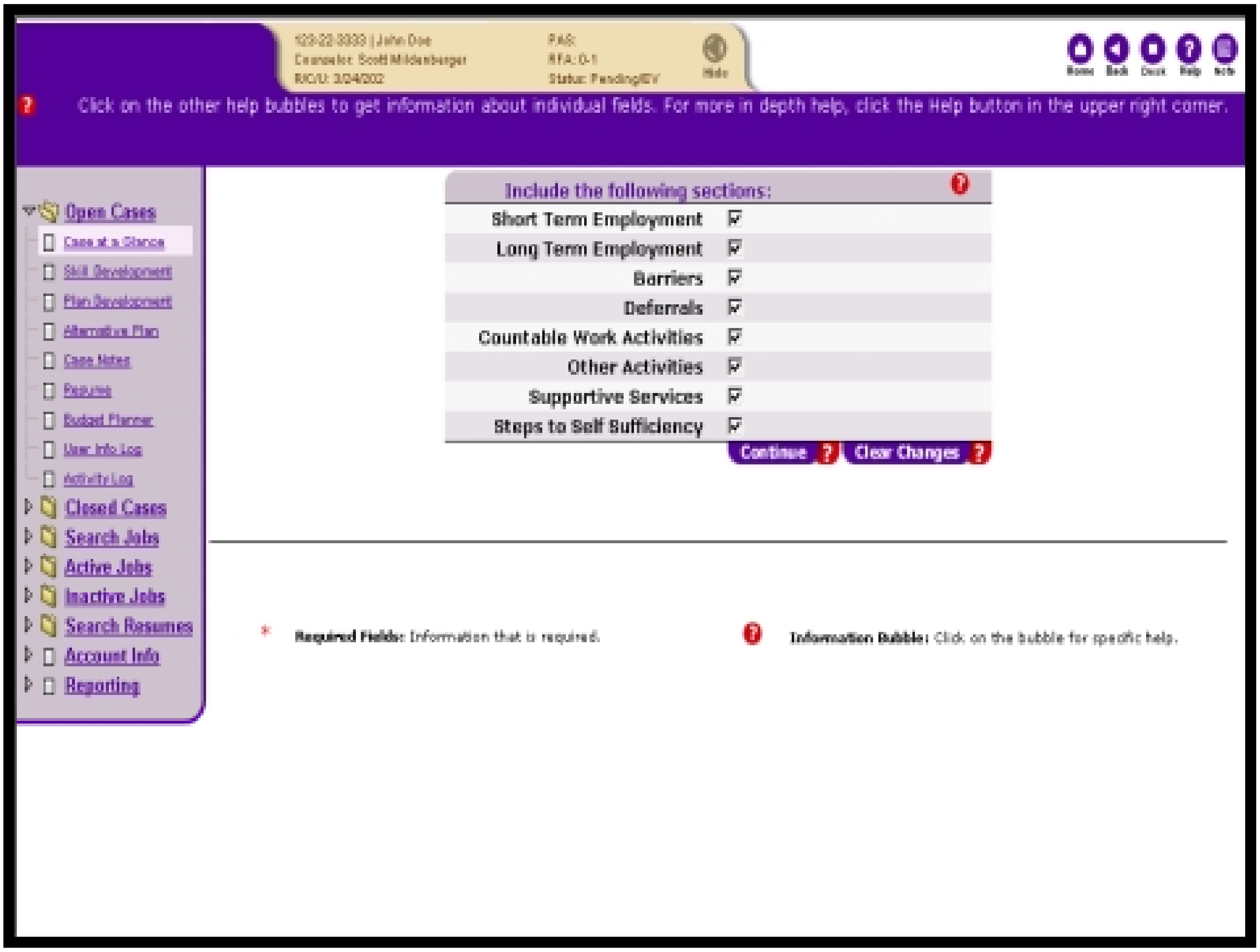
Module 6: Generating the Individual Responsibility Plan

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

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

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

- Viewing a customer’s Individual Responsibility Plan
- Editing portions of a customer’s Individual Responsibility Plan
- Previewing and printing a customer’s Individual Responsibility Plan
- Completing the Budget Planner Wizard within OSST



Selecting the Sections to include on the customer's Individual Responsibility Plan

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

- Short Term Employment
- Long Term Employment
- Barriers
- Deferrals
- Countable Work Activities
- Other Activities
- Supportive Services
- Steps to Self Sufficiency

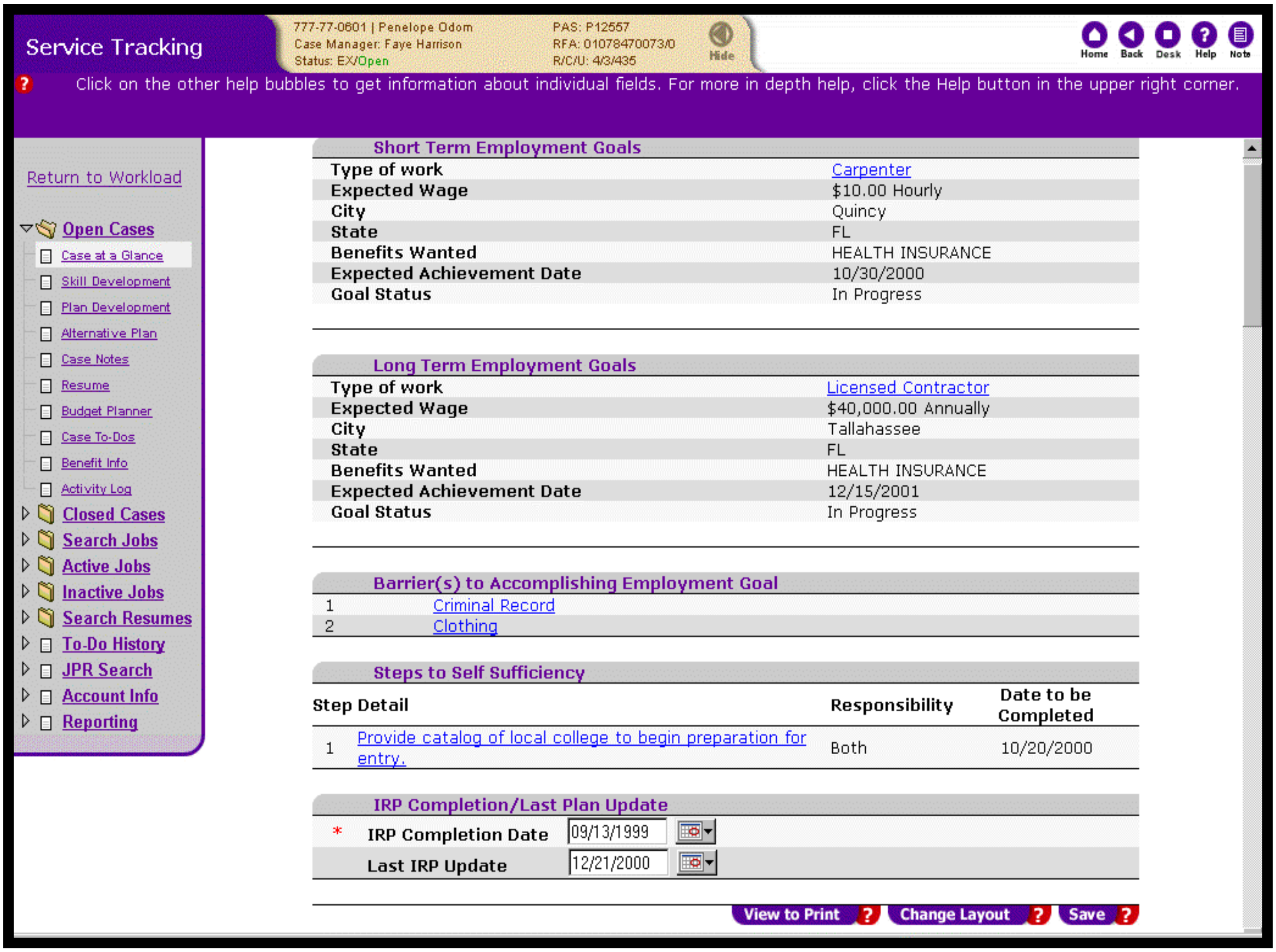
Click the check box to the right of the text to select the information you wish to view. After selecting the information you wish to view, click the ‘Continue’ button at the bottom of the page to go to preview the resulting plan.

Associated Procedures:

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

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

CLICK ‘Continue’ to preview the resulting plan



Viewing the Plan

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

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

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

Click the 'View to Print' button once you are satisfied with the information listed. This gives you a print preview of the plan.

Clicking the ‘Change Layout’ button takes you back to the ‘Select section’ page where you can change the selected areas that generate to the plan.

Associated Procedures:

I. <u>Adding the IRP Completion Date and Last IRP Update</u>

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

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

CLICK ‘Save’

II. <u>Changing the Layout of the Individual Responsibility Plan</u>

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

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

CLICK ‘Continue’

Welfare Transition
Individual Responsibility Plan (IRP)
Program: Unemployed Parent

Customer Name: Penelope Odom — **IRP Completion Date:** 09/12/1999
Welfare Transition Case Number: 777-77-0601 — **Print Date:** 12/21/2000

Employment Goal(s):

Short Term Employment Goals:

Type of Work	Expected Wage		City	State	Benefits Wanted	Expected Achievement Date	Goal Status
Carpenter	$10.00	Hourly	Quincy	FL	HEALTH INSURANCE	10/30/2000	In Progress

Long Term Employment Goals:

Type of Work	Expected Wage		City	State	Benefits Wanted	Expected Achievement Date	Goal Status
Licensed Contractor	$40,000.00	Hourly	Tallahassee	FL	HEALTH INSURANCE	12/15/2001	In Progress

Barrier(s) to Accomplishing Employment Goals:

1 Criminal Record
2 Clothing

General Steps to Self Sufficiency

		Responsibility	Date to be Completed	Completed Yes	No
Step 1	Provide catalog of local college to begin preparation for entry.	Both	10/20/2000	☐	☐

Explain any "No" answers

Acknowledgements:

I have worked with my Welfare Transition career manager to identify my employment goals and to plan activities to help me become self-sufficient. I agree to follow the steps listed and to complete all activities and responsibilities assigned to me. If I have a problem with my activity, it is my responsibility to let my Welfare Transition career manager know before the completion date. My opportunities and obligations as a Welfare Transition customer have been explained to me. I have received a copy of these opportunities and obligations and I understand them.

By signing below, I acknowledge that if I do not have good cause as determined by Welfare Transition, yet fail to follow the activities outlined in this Individual Responsibility Plan, I may be sanctioned.

Customer: ______________________

Signature: ______________________ **Date:** ____________

As the career manager, I will help my Customer in arranging needed services (to the extent that funds are available), will monitor progress and attendance in assigned activities, will provide regular re-evaluations and assessments and will provide counseling when necessary.

Welfare Transition Career Manager ______________________ **Telephone Number** ____________

Signature: ______________________ **Date:** ____________

Printing the Individual Responsibility Plan

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

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

Associated Procedures:

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

I. <u>Setting Page Margins</u>:

CLICK 'File' from your browser menu

SELECT 'Page Setup' from your menu options

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

CLICK 'OK'

II. <u>Printing the Individual Responsibility Plan using the 'Print' icon</u>

CLICK the 'Print' icon from your browser tool bar

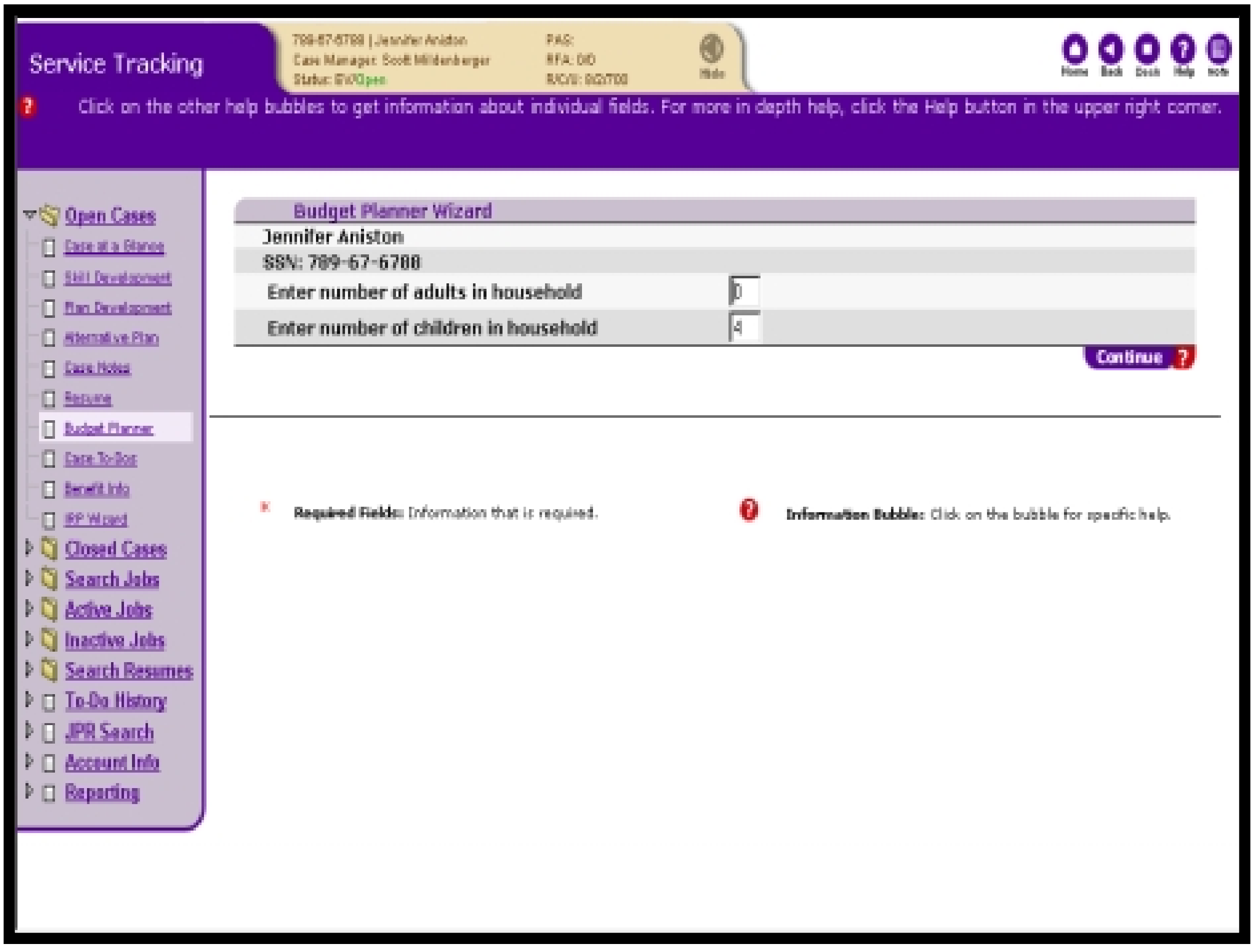
CLOSE the printable version of the plan by clicking the 'X' in the top right hand corner of the page

III. <u>Printing the Individual Responsibility Plan using your menu options</u>

CLICK 'File' from your browser menu

SELECT 'Print' from the menu options

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



Completing the Budget Planner Wizard

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

Associated Procedures:

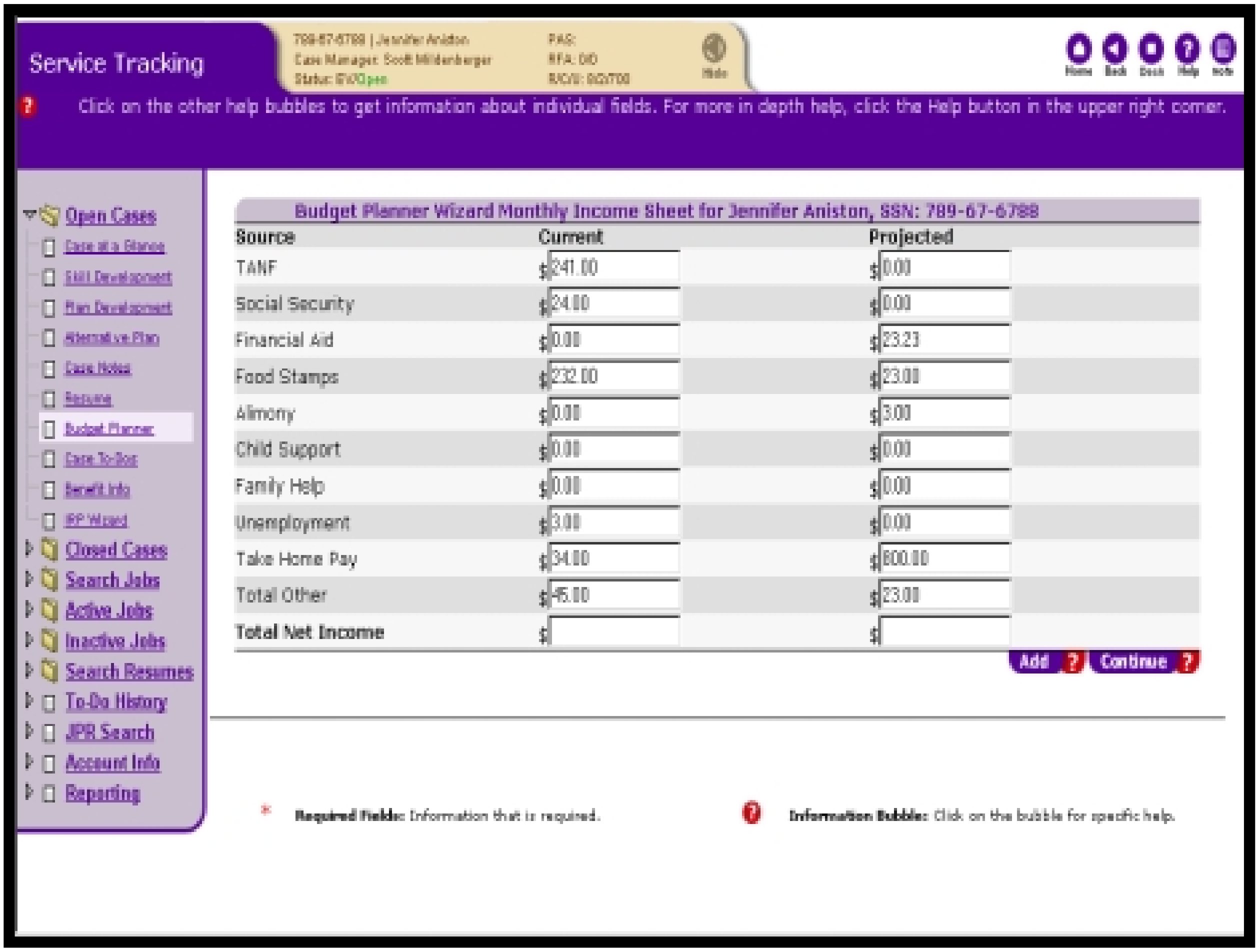
I. <u>Defining number of people in household</u>:

CLICK on the Budget Planner hyperlink on the Control Panel

ENTER the number of adults in the household

ENTER the number of children in the household

CLICK the ‘Continue’ button

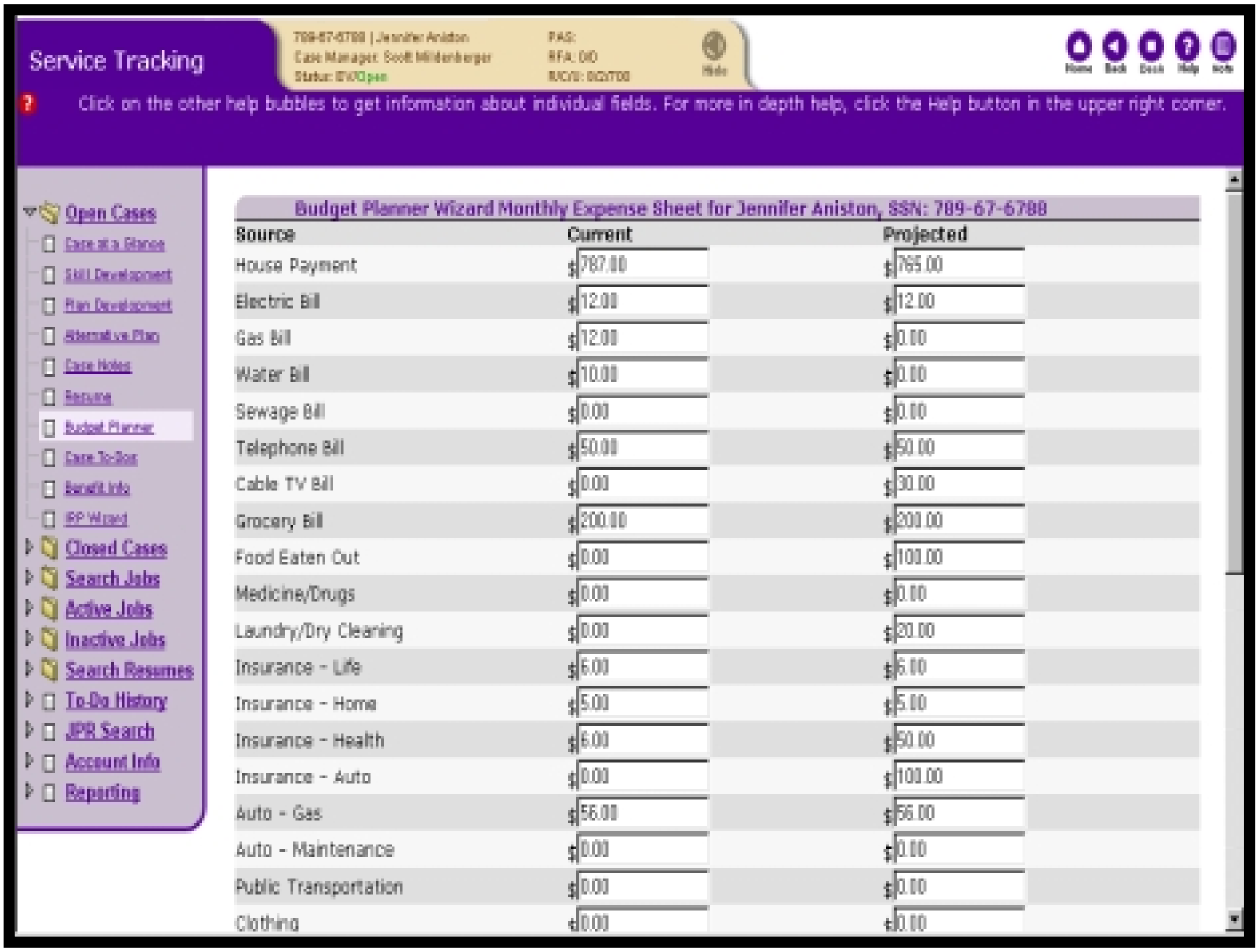


II. <u>Defining all sources of income:</u>

ENTER the dollars and cents amount for each potential income source listed

CLICK the ‘Add’ button

CLICK the ‘Continue’ button



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.

Open Cases
Case at a Glance
Skill Development
Plan Development
Alternative Plan
Case Notes
Resume
Budget Planner
Case To-Dos
Benefit Info
IRP Wizard
Closed Cases
Search Jobs
Active Jobs
Inactive Jobs
Search Resumes
To-Do History
JPR Search
Account Info
Reporting

Budget Planner Wizard Monthly Expense Sheet for Jennifer Aniston, SSN: 789-67-6788

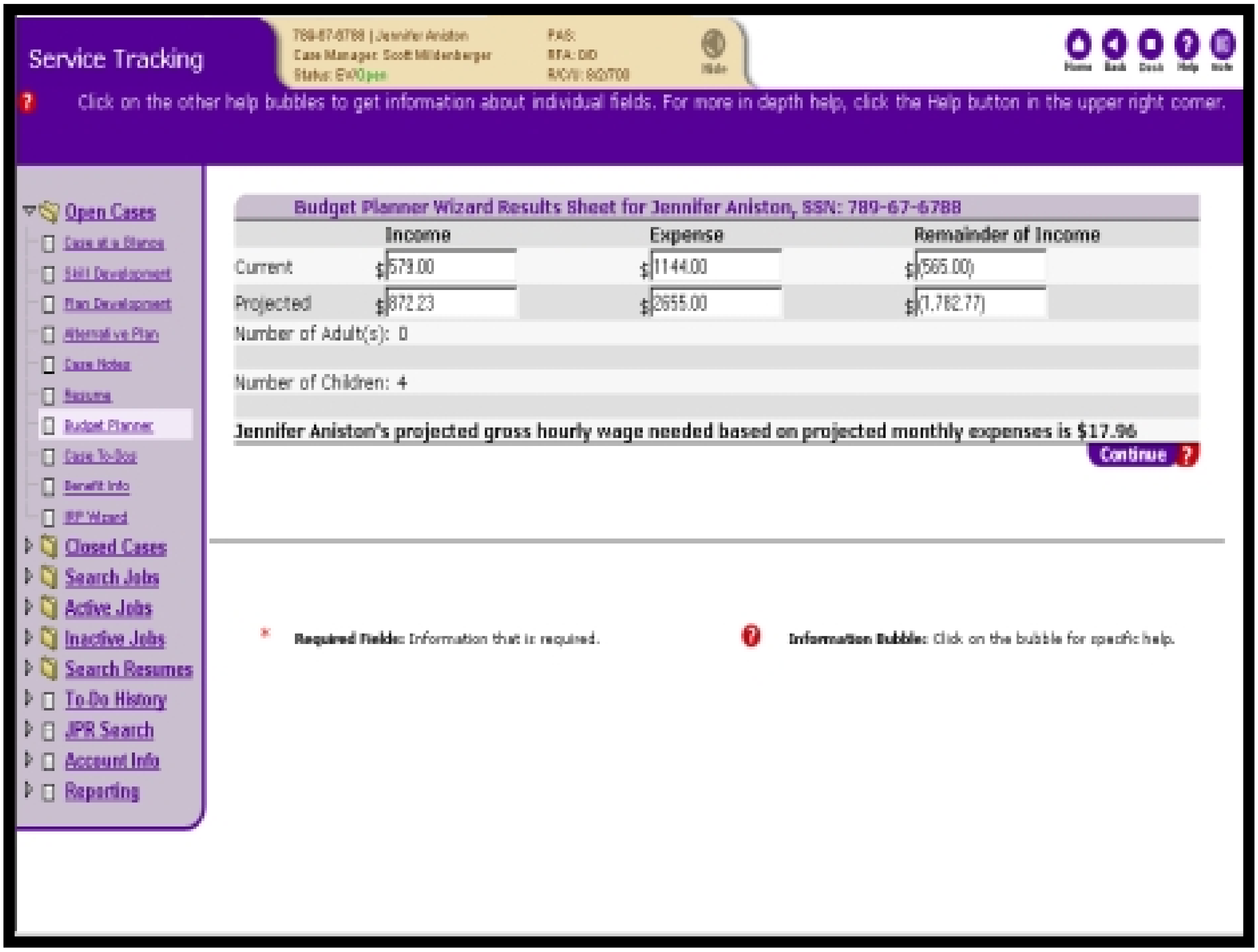
Source	Current	Projected
House Payment	$787.00	$765.00
Electric Bill	$12.00	$12.00
Gas Bill	$12.00	$0.00
Water Bill	$10.00	$0.00
Sewage Bill	$0.00	$0.00
Telephone Bill	$50.00	$50.00
Cable TV Bill	$0.00	$30.00
Grocery Bill	$200.00	$200.00
Food Eaten Out	$0.00	$100.00
Medicine/Drugs	$0.00	$0.00
Laundry/Dry Cleaning	$0.00	$20.00
Insurance - Life	$6.00	$6.00
Insurance - Home	$5.00	$5.00
Insurance - Health	$6.00	$50.00
Insurance - Auto	$0.00	$100.00
Auto - Gas	$56.00	$56.00
Auto - Maintenance	$0.00	$0.00
Public Transportation	$0.00	$0.00
Clothing	$0.00	$0.00

III. <u>Defining all sources of expense:</u>

ENTER the dollars and cents amount for each potential expense listed

CLICK the ‘Add’ button

CLICK the ‘Continue’ button


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.
Open Cases
Closed Cases
Search Jobs
Active Jobs
Inactive Jobs
Search Resumes
To Do History
JPR Search
Account Info
Reporting
Budget Planner Wizard Results Sheet for Jennifer Aniston, SSN: 789-67-6788
Income
Expense
Remainder of Income
Current $ 579.00 $ 1144.00 $ (565.00)
Projected $ 872.23 $ 2655.00 $ (1,782.77)
Number of Adult(s): 0
Number of Children: 4
Jennifer Aniston's projected gross hourly wage needed based on projected monthly expenses is $17.96
Continue
Required Fields: Information that is required.
Information Bubble: Click on the bubble for specific help.

Activity: Generating the Individual Responsibility Plan

Scenarios:

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

Now it's your turn to practice using the system! Let's start by taking your sample new case and performing the tasks associated with the following scenarios:

- Selecting the sections that will be generated to the customer's Individual Responsibility Plan
- Viewing a customer's Individual Responsibility Plan
- Editing sections on the customer's Individual Responsibility Plan
- Printing an Individual Responsibility Plan
- Complete the Budget Planner Wizard


Questions?