

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.

Service Tracking	777-77-1026 Milles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP	PAS: P55623 RFA: 55512538279/1 R/C/U: 2/2/203		Home Back Desk Help Note
Click on the other	help bubbles to get information about	ut individual fields. For more in	depth help, click the Help t	outton in the upper right corner.
Return to Workload	History of Steps to Self-S	ufficiency	-	
	Summary		Responsibility	Status
V 🕅 Onon Cases	Provide child care vouchers fo		Career Manager	Open
	Provide catalog of local colle Purchase alarm clock to preven		Cureer Manager Customer	Closed
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	Steps to Self-Sufficiency	Detail		
Plan Development		 P1	urchase alarm clock to	
Alternative Plan		pr	event being late for	
Case Notes	Describe the step needed	s	heduled appointments.	
Resume	to reach self-sufficiency			
Budget Planner				Y
Case To-Dos	Scheduled Completion Date	11	2/01/2000	
Benefit Info	Responsibility	0	ustomer 🔽	
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♦ 💐 <u>Search Jobs</u>	Completion Date	11	2/06/2000	
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	* Required Fields: Information that	it is required. 🤇	Information Bubble: Click o	on the bubble for specific help.

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.

Service Tracking	777-77-1026 Miles Cruz PAS: P56623 Case Manager: Lisa Campbell RFA: 55612636279/ Status: Open/MN/Open-UP R/C/U: 2/2/203	n 🔘 Hide	Nome Back Desk Help Note
Click on the oth	er help bubbles to get information about individual fields.	For more in depth help, click t	he Help button in the upper right corner.
Return to Workload	Education Detail For Customer Who Has R	ecieved Financial Aid	
		Pell Grant	A
🗸 🌍 Open Cases		Perkins Student Lo	oan
Case at a Glance	List All Sources Of Financial Aid		
Skill Development			-
Plan Development	*		-
Alternative Plan	Is The Customer Currently In School?	O Yes	© No
Case Notes	Highest School Grade Completed	Associate Degree Awa	urded 🗾
- Resume			
- Rudget Planner	Completed Training/Certifications		
	Description	Date Completed	Is Certification Current
Case Io-Dos	CDL Class A Ceritification	09/15/1992	Yes
Benefit Info	Hazardous Material Certification	07/20/1995	Yes
Activity Log	Cardiopulmonary Resuscitation (CPR)	11/03/1998	Yes
♪ 🗳 <u>Closed Cases</u>	Basic Child Care Training	09/30/2000	Yes
🕅 🦉 <u>Search Jobs</u>			
Active Jobs			
D 🐧 Inactive Jobs	Iraining/Certification Detail		
Search Resumes	Description Of Training/Certification	Hazardous Material Certificat	tion
To-Do History	Completion Date	07/20/1995	
▶ □ JPR Search	How Was The Training Funded?	Other	
Account Info	Tow was the framing runded:	C Voc	C No.
D Reporting	is the Customer's Certification Current?	(• 185	Via 2 Clear Changes 2 Cancel 2
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	•		>

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.

II. Adding Previous Training and Certifications

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

III. Editing Existing Training and Certifications

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.

rvice Tracking	777-77-1026 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP	PAS: P65623 RFA: 55512536279/1 R/C/U: 2/2/203	Hide	Home Back Desk Help
Click on the other I	help bubbles to get informatio	n about individual fields. Fo	r more in depth help, click the	Help button in the upper right corn
	Goals and Interests			
urn to Workload	Sort by: Date Identified 💌	Sort 😢		
Open Cases	Date Identified	Status	Description	Date Achieved
Case at a Glance	08/12/1992	Achieved	Pay off student loar	<u>15</u> 10/06/2000
Chill Development	05/03/2000	Achieved	Mechanic	11/30/2000
Skin beveropment	08/30/2000	In Progress	Trucking Company Man	lager Not Achieved
Plan Development	08/30/2000	No Longer Applicable	Lead Dispatcher	Not Achieved
Atternative Plan	00/01/2000	II FIOGIESS	<u>Track Dispatcher</u>	Not Achieved
Case To-Dos Benefit Info				
Benefit Info	Employment Goal E Goal Length	ntry	⊙ Short Term	C Long Term
Benefit Info Activity Log	Employment Goal E Goal Length Type of Work	ntry	© Short Term	C Long Term
Benefit Info Activity Log Closed Cases Search Jobs	Employment Goal E Goal Length Type of Work * Date Goal was Identifi	ntry	© Short Term Mechanic 05/03/2000 ██♥	C Long Term
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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.

III. Editing Goal Detail

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.

ervice Tracking	777-77-1026 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP	PAS: P55623 RFA: 55512536279/1 R/C/U: 2/2/203	Hide	Home Back Desk Help
Click on the other he	Ip bubbles to get information a	bout individual fields. Fo	r more in depth help, click the Help	o button in the upper right corr
turn to Workload	Needs and Barriers	ort 🕑		
<u>)</u> Open Cases				
Case at a Glance	Туре	Status	Date Identified	Completion Date
Skill Development	<u>Clothing</u>	Resolved	08/29/2000	09/04/2000
Plan Development	Transportation	Resolved	09/01/2000	08/31/2000
Alternative Plan	<u></u>		00,20,2000	
Case Notes	Add/Edit a Need or Ba	rrier		
Resume	Need/Barrier Detail		Clothing	•
Budget Planner	Status		Resolved 🔽	_
<u>Case To-Dos</u> Benefit Info	* Date Identified		08/29/2000	
Activity Log	Expected Completion Dat	e	08/31/2000	
<u>Closed Cases</u> Search Jobs	Completion Date		09/04/2000	
Active Jobs			Provide voucher to	
Inactive Jobs	Dian to receive the need	or barrior	purchase acid resistant	e
Search Resumes	Plan to resolve the need		gioves and boots.	
To-Do History				
Account Info	Would you like t	nis barrier displayed o	n the e vec	C No.
Reporting	Indivi	dual Responsibility Pla	n?	0110
			Save ?	Clear Changes ? Cancel ?
		<u>Go to Step</u>	s to Self-Sufficiency	
1				

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.

Service Tracking	777-77-1026 Miles Cruz Case Manager: Lisa Camp Status: Open/MN/Open-UI	PAS: P55623 obell RFA: 55512536279/1 P R/C/U: 2/2/203	O Hide	Home Back	Desk Help Note
Click on the other	er help bubbles to get informa	ation about individual fields. Fi	or more in depth help, click tl	he Help button in the upper I	right corner.
Peturn to Workload	Assess	nent Detail			
	Will this te external r	est be administered by an esource	⊙Yes ONo	0	
V Upen Cases	* Type of As	sessment Test	Skills Inventory	•	13
Civil Development	* Name of A	ssessment Test	SAGE TFA 💽		<u>100</u>
Plan Development	* Schedule I	Date of Completion	11/12/2000		
- Alternative Plan	Status		Scheduled 🔹		
Case Notes	* Administra	ator	Sylvan Learning Center		
Resume	Contact Pl	hone	(850) 555 . 2635		
Budget Planner	Address		122 Main ST		
	City		Anwhere		
Activity Log	State		Florida		
▷ 🕅 Closed Cases	Zin		77777 1234		
▷ 🗓 Search Jobs	τih		Save/Continue 2 C	lear Changes 2 Cancel 2	
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▷ □ <u>Account Info</u>	* Required Fields: Info	rmation that is required.	👔 Information Bubl	ble: Click on the bubble for specifi	ic help.
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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)

I. Entering Assessment Detail for an Internal Administrator

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'

II. Entering Assessment Detail for an External Administrator

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'

Service Tracking	777-77-1026 Miles Cruz PAS: P55623 Case Manager: Lisa Campbell RFA: 555125362 Status: Open/MN/Open-UP R/C/U: 2/2/203	279/1 O Hide Dosk Dosk Pielo Note
Click on the other	r help bubbles to get information about individual field	ds. For more in depth help, click the Help button in the upper right corner.
Return to Workload	Assessment Detail	0
	* Type of Assessment Test	Interest Inventory
⊽� Open Cases	* Name of Assessment Test	GATB
Case at a Glance	* Schedule Date of Completion	09/26/2000
Skill Development	Statue	
Plan Development	Status	
Alternative Plan	Completion Date	09/26/2000
Case Notes		Exhibits very good motor 📥
	Outcome /Results	coordination and finger
Case To-Dos	outoonto, nosuito	
Activity Log		Save/Continue ? Clear Changes ?
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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.

Service Tracking	777-77-1026 Miles Cruz Case Manager: Lisa Campbell Status: Desc(MMCons. UR	PAS: P55623 RFA: 555125 RC/II: 2020	3 36279/1 (1) 12 Hide				C	ne Back	Desk Hel) (
Click on the other help t	bubbles to get information about in	ndividual fi	elds. For more ir	n depth I	help, click tł	ne Help b	outton in the u	ipper i	ight cor	mer.
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⊽⁄§ <u>Open Cases</u>			· · · · · · · · ·							
Case at a Glance	* General Learning Ability	/ 2	C Very High	O High	C Average	• Low	C Very Low			
Skill Development		5								
Plan Development	 * Verbal Aptitude 	2	C Very High	C High	C Average	⊙ Low	C Very Low			
Alternative Plan			o	o	~ .	0.1				
Case Notes	 Numerical Aptitude 	2	O Very High	O High	C Average	• Low	C Very Low			
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Careek Decomposition	notor operantettett	Ľ.	~ ouy man	- men	~ riverage	· 1044	~ • • • • • • • • •			
D To Do History	* Finger Dexterity	5	• Very High	C High	C Average	C Low	C Very Low			
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Account Info	* Manual Dexterity	5	• Very High	O High	C Average	O Low	O Very Low			
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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

Service Tracking ? Click on the othe	777-77-1026 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP er help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.
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Ø	

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

Service Tracking		777-77-1026 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP	PAS: P RFA: 50 R/C/U: 1	55623 5512536279/1	D		Home Back	Desk Help Note
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e							interne	et

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

Service Tracking	777-77-1026 Miles Cruz Case Manager: Lisa Campbell	PAS: P55623 RFA: 55512536279/1	۲	000	00
Click on the oth	Status: Open/MN/Open-UP or bolin hubbles to got information :	R/C/U: 2/2/203	ior mara in danth haln, click t	home back besk	corpor
	er neip bubbles to get information a	sbout individual neids. P	or more in depth help, click t	ne help button in the upper right	comer.
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e -				🔰 🛛 🔁 Internet	

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

Service Tracking Click on the oth	777-77-1026 Miles Cruz PAS: P55623 Case Manager: Lisa Campbell RFA: 56512536279/1 Status: Open/MN/Open-UP R/C/U: 2/2/203 Hit er help bubbles to get information about individual fields. For mo	Ade Loome Back Dock Pielo Not
<u>Return to Workload</u>	Other	
	* Name of Assessment Test	NATB
▽⁄∽ <u>Open Cases</u> □ <u>Case at a Glance</u>	* Docuke	Miles need to improve 📕 his listening skills.
Skill Development Plan Development	Results	×
Alternative Plan Case Notes Regume		Save ? Clear Changes ?
	* Required Fields: Information that is required.	Information Bubble: Click on the bubble for specific help.
 ▷ ◯ Search Jobs ▷ ◯ Active Jobs ▷ ◯ Inactive Jobs 		
▷ Search Resumes ▷ □ To-Do History ▷ □ IPR Search		
 ▷ □ <u>Account Info</u> ▷ □ <u>Reporting</u> 		
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(8)	M	

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

MyFlorida Jobs Tracking	Services, Tr	aining, Activities and Employment
WAGES MIS		<u>OSST</u>
 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.

Service Tracking	777-77-1026 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP	PAS: P55623 RFA: 5551253627 R/C/U: 2/2/203	9/1 () Hide			Home Back Desk Hel	lp Note
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	d						F

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)

I. Add a Provider

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'

Service Tracking	777-77-1028 Miles Cruz P. Case Manager: Lisa Campbell R Status: Open/MM/Open-UP R.	AS: P66623 FA: 55612636279/1 () /C/U: 2/2/203 Hide	Home Back Opsk (?)
Click on the othe	r help bubbles to get information about indi	vidual fields. For more in depth help, click	the Help button in the upper right corner.
Return to Workload	New Service Provider		Tins
	* Name	ACME Child Daycare Center	iipsi
∀ ♥ <u>Open Cases</u>	* Addross	311 Main ST	To the left, enter the detailed
Case at a Glance	Address		information on the selected
Plan Development	*	Arestor	
Alternative Plan	City	Anywhere	For changes in address
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	* State		form.
Budget Planner	Zip	7/7/7 - 4321	When finished, click the save
Case To-Dos	FEID Number	777264777	button.
Benefit Info	* Phone	(850) 555 - 7531	
Activity Log	Fax	(850) 555 - 1357	
Clused Cases	Website	www.acmechildcare.com	
Cartive Jobs	Contact	Jane Childs	
▷ <a>Inactive Jobs	Title	Owner	
▷ 💐 Search Resumes	eMail	jchilds@myemail.com	
▷ 🛛 <u>To-Do History</u>	Contract Number	7771234	
▶ □ JPR Search	Service Information	•	
▷ □ <u>Account Info</u>	Program Cost	50.00	
₽ 🛛 <u>Reporting</u>	Program Description	Basic Child Care A services children ages 6mos to 5yrs old.	
		Save ? Cancel ?	

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.

Budget Information - Microsoft Internet	Explorer
Miles Cruz's Service Budget	\$ 500.00
Service Dollars Spent :	\$ 0.00
Current Available Budget :	\$ 500.00

II. Add a Service Budget Amount for a Customer

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'

Provider Search Return to Workload © Open Cases [Select criteria and click 'Search' to display] Case at a Glance Provider Name Begins With Case at a Glance Provider Name Begins With Case at a Glance Stall Development Click the Help button in the upper right comer. I and Development Stall Development City Begins With Cloce Real Cloce Changes 2 Show All 2 Search Resumes Active Jobs Search Resumes Reporting To Do History JPR Search Account Info Reporting	Service Tracking	777-77-1026 Miles Cruz PAS: P55623 Case Manager. Lisa Campbell RFA: 55512538279/1 Status: Dpen/MN/Open-UP R/C/U: 2/2/203	de O O O O O O O O O O O O O O O O O O O
Return to Workload V\$ Open Cases Case da Glance Search and Click 'Search' to display] Provider Name Begins With ac Star Bevelopment Atternative Plan Phone Number Begins With ac Click Begins With ac Click Begins With ac Click Begins With ac Click Begins With ac Star Hotes Phone Number Begins With ac Click Begins With ac Click Begins With ac Click Begins With ac Click Begins With ac Search 2: Clear Changes 2: Show All 2: Search Active Jobs Search Active Jobs Search Resumes Clock Cases Search Resumes Clock Cases Search Active Jobs Active Jobs Active Jobs Active Jobs Active Jobs Required Fields: Information that is required. Information Bubble: Click on the bubble for specific help.	Click on the oth	er neip bubbles to get information about individual fields. For mo	r Search
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		ا	

III. Search for a Service Provider

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'

Service Tracking Click on the oth	777-77-1028 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP er help bubbles to get information about in	PAS: P55623 RFA: 55612538279/1 R/C/U: 2/2/203 dividual fields. For more in depth l	help, click the Help t	Home Sock Deck (Holp Not
Return to Workload	Provider Search Results	[Click a provider name to view	details]	
	Select Provider Ace Hardware Acme Child Daycare Center Acute Care Acute Care	City Bushnell Anywhere Crystal River	Zip 33513 77777-4321 32629	Records retrieved: 3 Phone 904-793-7949 850-555-7531 904-563-1119
		<u>Change Search Criteria</u>	2	Add Provider 2
 Activity Log Closed Cases Search Jobs Search Jobs 	* Required Fields: Information that is r	required. 😢 Info	ormation Bubble: Click (on the bubble for specific help.
 Inactive Jobs Search Resumes To-Do History JPR Search Account Info Reporting 				

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

Service Tracking	777-77-1028 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP	PAS: P55623 RFA: 55512536279/1 R/C/U: 2/2/203	Hide		Home Back Desk Help Note
Click on the other hel	p bubbles to get information ab	out individual fields. For r	nore in depth help,	click the Help buttor	in the upper right corner.
Return to Workload	Provider Infor	nation			
	Name:	Acme Child Daycare	Center		
⊽⁄§ <u>Open Cases</u>	Address1:	311 Main St			
Case at a Glance	Addressz:	Ste 113 Anywhoro			
Skill Development	State:	FI			
	Zin:	77777-4321			
	Phone:	850-555-7531			
Atternative Plan	Web Site:				
Case Notes					
Resume	Service Details	5			
Budget Planner	Service Type		Welfare Transition	on Child Care 🔻	
Case To-Dos	Service Recipient	rc i	L		
Benefit Info	In House:				
Activity Log	Anticinated Star	Date: Anticipat	ed End Date:	Actual Start Date	e:
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•) I I I I I I I I I I I I I I I I I I I

V. Add a Supportive Service

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.

Service Tracking	777-77-1026 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP	PAS: P55623 RFA: 55512536279/1 R/C/U: 2/2/203	Mide		Home Back	k Desk Help Note
Service Tracking Click on the other help Return to Workload Case at a Glance Skill Development Plan Development Alternative Plan Case Notes Resume Budget Planner Case To-Dos Benefit Info Activity Log Cosed Cases Search Jobs Closed Cases Search Jobs Case Active Jobs Active Jobs Active Jobs Case Active A	777-77-1028 Miles Cruz Case Manager: Lisa Campbell Status: Open/MN/Open-UP pubbles to get information abo Provider Inform Name: Address1: Address2: City: State: Zip: Phone: Web Site: Service Details Service Type Anticipated Start 12/01/2000 * Total Cost Status Do you want this on the Individual Service Outcom Reason for Service	PAS: P56623 RFA: 55612536279/1 R/C/U: 2/2/203 ut individual fields. For ation Acme Child Dayca 311 Main St Ste 113 Anywhere FL 77777-4321 850-555-7531 www.acmechildc. Date: Anticip 12/08/2 displayed Responsibility Plan? ne 9 Outcome	r more in depth help, are Center are.com Welfare Transit ated End Date: 50.00 S0.00 Complete Completed Completed	click the Help butt ion Child Care Actual Start D. 12/01/2000 C no	en in the upper	right corner.
	Detailed Reason fo Actual End Date:	r Service Outcome	12/07/2000 [Save		2 Cancel 2	

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:

I. Record an Outcome for an existing service

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)

