1: Overview, Access, Registration

The Virtual OneStop system is a valuable tool for anyone interested in looking for work, training, or career exploration. Job seekers, students, employers, and others seeking employment and training support will find it convenient and helpful. This system is designed to be comfortable for everyone, even the person who has very little computer experience.

However, the system also has the capability of allowing one-stop or workforce center staff to help individuals and employers manage their accounts, manage both core and intensive services, maintain profiles, and take advantage of the many options offered through Virtual OneStop.

This guide provides information and steps for using Staff functions. This chapter will:

- Briefly describe the staff functions available in Virtual OneStop
- Describe basic access and navigation in Virtual OneStop
- Describe conventions used (on the web, within Virtual OneStop, and in documents)

Note: This chapter assumes no previous knowledge of Virtual OneStop, Internet, Web browser, or standard Windows conventions. If you are already familiar with basic one-stop and workforce management concepts, or with logging into Web sites and using a Web browser, you may wish to skip sections in this chapter and refer back to the chapter only when needed.

Overview of Virtual OneStop®

For the staff member at a one-stop or workforce center, Virtual OneStop incorporates case management, customer tracking, and follow-up services. A case manager or counselor can help individuals with basic (i.e., core) services, and track the information. They can also track and share information regarding eligible individuals receiving intensive and training services. Staff can also support employers with basic services related to job orders and employer accounts.
**Intensive Individual Services**

Virtual OneStop helps staff support individuals with the following *intensive* services:

- **Program Application and Eligibility Determination** – Virtual OneStop uses a common database. Staff members can enter data once for individuals using various services from different programs or agencies, or they can enter required data for a specific program application. Either way, the data is shared by programs from different agencies within the one-stop partnership, and accessed where it is needed. This streamlines the process of matching customers with services they need pertaining to employment.

- **Case Management and Tracking** – Staff can enter, assign, review, and monitor case information for specific individuals registered within the workforce center. Authorized staff can automatically assign customers to specific case managers, or to multiple members of the one-stop staff. The case manager or counselor can view personal folder information, employment and training research, reports, and program activities. Applications, enrollment forms, status changes, program outcomes, and follow-up forms can be entered, viewed, and modified. Case histories can also be viewed. For more information about case management, see chapter 3 - Manage Individuals – Create, Assist, and Manage Profiles, and chapter 4 - Individuals – Case Management.

- **Case Notes** – Counselors and case managers can enter their own case notes for activities and observations about their customers. Security privileges control who sees case notes, as well as other case management and tracking features, so that data is viewed on a need-to-know basis. For information about working with case notes, see the topic “Case Notes Tab” in chapter 4 - Individuals – Case Management.

- **Assessment** – Assessment Process Summary Information can be recorded for multiple test results, allowing progress to be tracked for a customer with multiple intensive assessments. For more information about assessments, see the topic “Managing a Self-Assessment Profile” in chapter 3 - Manage Individuals – Create, Assist, and Manage Profiles.

- **Skills and Interests Analysis** – Staff can help individuals define their skill sets, work interests and work importance, and match the skills to standard O*NET occupation definitions (which helps to match individual skills to existing jobs). For more information on skills and interests, see the topic “Managing a Self-Assessment Profile” in chapter 3 - Manage Individuals – Create, Assist, and Manage Profiles.

- **Appointments and Messaging** – Staff can send and view messages from all the cases in their caseload. This includes appointment and event notifications. For more information about working with appointments and messages, see the topic “Messages” in chapter 2 – My Staff Workspace.

- **Staff Courses** – Staff can take online courses related to workforce development through the optional service function with Dynamic Works® Staff Courseware. Staff can also learn more about the system through a series of online learning videos which cover a wide variety of case management and staff topics. For information, see chapter 33 - Other Staff Services.

**Employer Services**

While employers can self-register and modify their information, staff members can also provide an employer with assistance in accessing Virtual OneStop, creating job orders, conducting candidate searches, and monitoring their accounts.

Virtual OneStop offers staff-assisted support for the following *employer* services:

- **Registration** – Staff can help employers with creating an account in the system, setting up a corporate profile or recruitment profile, and creating contacts.

- **Job Orders** – Staff can help employers create/maintain their job orders and referral information.
Monitoring and modification of employer accounts – Staff can create or modify employer accounts, and help employers with maintaining accounts, adding service plans, working with Virtual Recruiter, etc.

Reporting of job order activity – Staff can help employers create or run reports on the activity for their job orders.

Access

This section describes how to get started with logging into Virtual OneStop with Staff access, and the typical homepage and navigation conventions for moving around in Virtual OneStop.

Note: If you need an account created, see your Virtual OneStop administrator. Although Virtual OneStop allows employers or individuals to create their own accounts, an administrator must create staff accounts. You cannot use the Register link to create a staff account.

Logging Into VOS and Staff Services

To get started with Virtual OneStop staff services:

1. Access the Virtual OneStop Web address using your Internet browser.

   Note: Depending on the Web page setup, you may need to click the Virtual OneStop link. The following figure shows a sample screen.

   You can select the language in which the Virtual OneStop main menu is displayed by choosing an option at the bottom of the screen before you log in. Normally, you will change the language (if desired) after you log in as part of changing your settings. This will save the change and apply it to all screens. See “Settings” under “Using the Footer Toolbar” in the following topic.

2. Enter your Username and Password, and click Sign in.

   The Services for Staff screen and the Navigation menu display the different services that you can access (as shown in the following figure). This page includes a summary of Current User Statistics.

   Note: Your system may not include all the options depicted, depending upon your system’s configuration.
Accessing the Left Menu (the button)

As part of the Responsive Web Design and Interface Facelift, in Virtual OneStop, the Left Menu can be hidden or displayed (for easy navigation). This can be done using an icon in the upper left of all screens, which is referred to as the Hamburger icon. The Hamburger icon functions is a toggle button, which displays or hides the navigation menu when it is clicked.

- For desktop users - the menu is OPEN/displayed by default. (If the browser window is reduced to a tablet size it will close, similar to mobile user default.)
- For mobile users - the menu is CLOSED by default.

Note: In this guide, instructions for starting from this menu will use the phrase “left menu.” For example...
From the left menu, select Communications ➤ Messages to see your system messages.
Working with the Message Alert

If you have new or unread messages, a message alert pops up when you log in. Click OK to review the messages, or Cancel to see the messages at a later time.

See “Messages” in chapter 2 - My Staff Workspace, for more details on using the message and email functions.

How to Navigate / Move Around in Virtual OneStop

The design of Virtual OneStop and its accessibility using standard Web-based conventions lets you access a wide variety of information and move around easily within the system. The following subtopics describe some of the navigation, selection, and searching conventions used in Virtual OneStop.

Navigation Menu and Fly-outs

Virtual OneStop includes a left navigation menu that lets you quickly and easily access any available services without navigating through multiple screens. Using the left navigation menu and fly-outs, you can access all of the services you need as a staff member.

The left navigation menu appears in all versions of Virtual OneStop. Depending on location and options, you can also select from cascading menus (or fly-outs), giving you access to service options. The graphic at right displays a fly-out for entering referral results.

Note: Staff can adjust the top-down sequence and collapsed/expanded defaults of the left navigation through options in My Staff Account, so the sequence and options displayed on the left navigation in this manual may differ from those for your specific staff login. Refer to “My Staff Account” in chapter 2 - My Staff Workspace, for more details.

My Staff Workspace

There are many common resources that you will repeatedly use as a staff member, which are specifically saved for you (such as your saved messages, appointments, alerts, search lists, correspondence templates, job skill sets, and specific reports). These can be accessed in “My Staff Workspace.”

Note: The My Appointments and Upcoming Events links that display in My Staff Workspace are your staff member appointments and events, not those of the assisted individual/employer.

“Currently Managing” on Navigation Menu

Once a staff member has selected an individual or employer, a Currently Managing area displays in the left navigation menu. This provides quick hyperlinks to the folders/profiles for the individual, or to specific landing pages (as shown at right).

Clicking on the name is a shortcut to the Case Management folder for Case Notes for that individual.

Note: A Service Tracking status will also be displayed (which is normally ON). Depending on your system and staff configuration, the default may be off and you may have the privileges to click the tracking status and change the default. For example,
if you are a Veteran’s Rep temporarily helping a non-veteran, you may need to turn change this status while assisting that individual.

Backward and Forward Navigation

Use the buttons << Back and Next >> on each screen to save, move forward, or return to a previous screen. This will keep you from losing any information you entered into the system. You can also click links on the bottom of the screen to return to Services for Workforce Staff, or other areas. See “Using the Footer Toolbar” in the next section.

⚠️ Do not use the browser’s Back or Forward buttons ⚠️. You may lose entered data by using the browser buttons. There may be instances (like returning to a Search page from the search result) where you want to use this button to keep and modify your original selections. It is recommended that you do not use the browser’s back button – entered data can be lost if you change screens in this way.

You can move up and down in a screen by dragging the Scroll Box at the right of the screen. To do this, click and hold down the left mouse button while moving the mouse. Release the mouse button when you are at the desired position. You may also click and hold the Scroll Arrow or click within the Scroll Bar.

VOS Navigation Elements

Note: The links to specific tabs or locations under the Action column (in the figure above) can be customized for up to five links, configured uniquely by the staff member, and they can be different in the Summary view of the resulting user names than in the Detailed view. This screen is described in the Preferences (Landing Pages) section of chapter 2 – My Staff Workspace.
Hot Links (Moving Quickly Between Pages)

The Virtual OneStop system recognizes the Internet convention for “hot links” or “hyperlinks.” Whenever you see a word or phrase that is underlined, clicking on that word or phrase will take you directly to the referenced document. In the example shown above, clicking on “GSIMARIE3” under the User Name column would load the User Profile page for that user, or another location based on your preference settings (referred to as the “Assist Individual Landing Page”). Preference settings for these links can be accessed through My Staff Account in My Staff Workspace (described in chapter 2). Through these hot links, you can choose from several different locations, such as Case Notes, the Programs tab, or the User Profile page, to begin review of a client.

Using the Footer Toolbar (Changing Settings)

The footer appears at the bottom of every screen. It displays key words that are quick links to exiting the system, or changing the focus, views, or preferences in the system. The links are described below, followed by a description of changing screen views (which is accessed from the Preferences link on the footer).

The links may increase as a staff member assists an individual or employer.

*Staff Account* and *Reference* only display for Staff users.

- **Services** – Returns to the Staff Services directory.
- **Portfolio** – Opens the staff services options through the individual’s Portfolio folders when assisting an individual or an employer.
- **Site Map** – Displays a listing of categories and sub-categories which serves as a guide to the site.
- **Site Search** – Opens a search page which allows you to search this site for information. You can perform a search using a variety of keyword combinations using multiple search criteria. You can search through content on the site, as well as tasks you can perform on the site (such as a job search).
- **Preferences** – Opens a separate window from which you can change your system default settings for display screens in the system. This includes your view of Themes; Languages; fly-outs in the left navigation menu; and the ability to open a Menu Configuration screen to define which staff menu groups are expanded or collapsed, or in what order the groups are displayed, as well the configuration for displaying Individual and Employer menu groups when assisting individuals or employers.
- **Assistance** – Opens the Assistance Center page, which includes many of the options in the footer, as well as access to quick reference cards. This option is available when assisting an individual or an employer.
Overview, Access, Registration

Preferences Page and Menu Configuration Preferences

How to Change Screen Views

As mentioned previously, the Preferences link in the toolbar at the bottom of every screen opens options that let you control how the screen will display. These settings are described as follows:

Graphics and Text Display

Use one of the following graphic themes to view Virtual OneStop screens.

Web Theme uses a light-graphics display to show the different services offered. Click the service title to choose a service. Use this display option when you are working with the system over an average speed Internet connection.

Text Theme uses a text display without graphics. This theme is for those who prefer no graphics or who have a slower Internet connection.
Visually Impaired Display
Geographic Solutions offers an optional system that is designed for visually impaired or low vision users. The screen presents words that are larger and easier to see. Text is read to the user through screen reader software. Graphics are not used in this version. Depending on your system and the available hardware and software, this option may or may not be available. It is referred to as JAWS (Job Action With Speech option for Windows).

Language Display
Depending on your system, screen displays may be offered in a Spanish version. This is possible for individuals and employers through My Preferences. However, it is only available for staff (when configured for the system) through changing the language on the home page before logging into the system. An example for Spanish on the Directory of Services is shown below.

Enable/Disable Fly-out Menus
Click the radio button to turn the fly-out menus that cascade from the left navigation bar on or off.

Page Services Tracking
A very small set of select staff can use the Page Services Tracking link (a Track Page link at the bottom of most screens) to add or review the services that are being automatically tracked and recorded related to a specific web page. This is a case management option that may be limited to specific managers and administrative staff. Staff members without this privilege will not see the link appear.
Click the **Add** button to add services that the page will track and record. Services already being tracked will appear in a table below this button.