# 4: Individuals – Case Management

<table>
<thead>
<tr>
<th>Staff Profiles – General Profile</th>
<th>4-2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary Tab</td>
<td>4-2</td>
</tr>
<tr>
<td>Summary Tab – General Profile</td>
<td>4-2</td>
</tr>
<tr>
<td>Summary Tab – Case History Panel</td>
<td>4-3</td>
</tr>
<tr>
<td>Summary Tab – Phased Case History</td>
<td>4-4</td>
</tr>
<tr>
<td>Summary Tab – Individual Information Panel</td>
<td>4-5</td>
</tr>
<tr>
<td>Summary Tab – Verification Summary Panel</td>
<td>4-5</td>
</tr>
<tr>
<td>Viewing Documents in Verifications List</td>
<td>4-7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Case Notes Tab</th>
<th>4-8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a Case Note Template</td>
<td>4-9</td>
</tr>
<tr>
<td>Add a Case Note</td>
<td>4-11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activities Tab</th>
<th>4-13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Job Referrals</td>
<td>4-14</td>
</tr>
<tr>
<td>Record Job Referral Results</td>
<td>4-14</td>
</tr>
<tr>
<td>Add a Referral</td>
<td>4-15</td>
</tr>
<tr>
<td>Activity History/Service Plan</td>
<td>4-15</td>
</tr>
<tr>
<td>Add Service</td>
<td>4-16</td>
</tr>
<tr>
<td>Add Multiple Services</td>
<td>4-18</td>
</tr>
<tr>
<td>Employment History</td>
<td>4-19</td>
</tr>
<tr>
<td>Event History</td>
<td>4-20</td>
</tr>
<tr>
<td>Alternate Contacts</td>
<td>4-22</td>
</tr>
<tr>
<td>Add Alternate Contact Information</td>
<td>4-23</td>
</tr>
<tr>
<td>Staff Referrals to Providers</td>
<td>4-23</td>
</tr>
<tr>
<td>Manage Referral Types</td>
<td>4-24</td>
</tr>
<tr>
<td>Add Referral Type</td>
<td>4-25</td>
</tr>
<tr>
<td>Manage Referral Results</td>
<td>4-27</td>
</tr>
<tr>
<td>Add Referral Result</td>
<td>4-27</td>
</tr>
<tr>
<td>Add Referral for Service</td>
<td>4-29</td>
</tr>
<tr>
<td>Wage Information for Program Participant</td>
<td>4-31</td>
</tr>
<tr>
<td>Local Status Tracking</td>
<td>4-31</td>
</tr>
<tr>
<td>Add Local Activity</td>
<td>4-33</td>
</tr>
<tr>
<td>Add Multiple Local Activities</td>
<td>4-34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff Profiles – Case Management Folder</th>
<th>4-35</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs Tab</td>
<td>4-35</td>
</tr>
<tr>
<td>Overview</td>
<td>4-36</td>
</tr>
<tr>
<td>Displaying Program Forms</td>
<td>4-37</td>
</tr>
<tr>
<td>Creating/Editing a Program Application – via the Application Wizard</td>
<td>4-39</td>
</tr>
<tr>
<td>Creating/Editing a Service Enrollment – via the Enrollment Wizard</td>
<td>4-41</td>
</tr>
<tr>
<td>Plan Tab</td>
<td>4-43</td>
</tr>
<tr>
<td>Objective Assessment Summary (OAS)</td>
<td>4-43</td>
</tr>
<tr>
<td>IEP</td>
<td>4-57</td>
</tr>
<tr>
<td>Goals</td>
<td>4-58</td>
</tr>
<tr>
<td>Objectives</td>
<td>4-59</td>
</tr>
<tr>
<td>Predefined Objectives</td>
<td>4-60</td>
</tr>
<tr>
<td>Working with Existing Plans</td>
<td>4-62</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessments Tab (Case Management)</th>
<th>4-63</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Skills Assessment Entry</td>
<td>4-63</td>
</tr>
<tr>
<td>Aptitudes</td>
<td>4-65</td>
</tr>
<tr>
<td>WorkKeys Assessments</td>
<td>4-66</td>
</tr>
<tr>
<td>Other Assessments</td>
<td>4-67</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff Profiles – Report Profile</th>
<th>4-67</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tracking Tab</td>
<td>4-68</td>
</tr>
<tr>
<td>Combined Assessments Tab</td>
<td>4-68</td>
</tr>
<tr>
<td>Labor Exchange Tab</td>
<td>4-69</td>
</tr>
</tbody>
</table>
This chapter discusses the case management options available in your staff’s profile when assisting an individual, including the General Profile tabs (Summary, Case Notes, Activities, and Documents), and the Case Management Profile tabs (Case Summary, Programs, Plan, and Assessments). Performing case management is a full-range-of-services component. It provides a web-based solution for counselors, case managers, and other supervisory staff members to enter and share information on participants who receive both basic and individualized training services and other services through a federal program.

Options exist for displaying the Wagner-Peyser program (WP), the Workforce Investment and Innovation Act program (WIOA), and other programs that may be defined on a local or non-federal level.

From tabs in General Profile and Case Management Profile you can update, review, add, and manage program and case information for an individual. Each tab is covered in its own topic, as follows:

**General Profile:**
- Summary tab
- Case Notes tab (see page 4-8)
- Activities tab (see page 4-13)
- Documents tab (see page 4-13)

**Case Management Profile:**
- Case Summary tab (same as summary)
- Programs tab (see page 4-35)
- Plan tab – OAS (see page 4-43)
- Assessments tab (see page 4-63)

**Staff Profiles – General Profile**

Four tabs deal with general aspects of individual case management in the General Profile folder:
- **Summary** – Provides multiple panels/views of the individual’s summary case management and general information.
- **Case Notes** – Serves as the primary location for staff to manage an individual’s case notes.
- **Activities** – Maintains the individual’s Wagner-Peyser activity services, including the creation of these services, in addition to the Programs tab screen.
- **Documents** – Displays the individual’s data verification documents used to determine program eligibility.

**Summary Tab**

Once you have selected an individual to work with, clicking on their name in the left navigation bar displays a Summary tab (unless you set a different landing page).

This tab is a quick starting point to review individual cases through selection of separate displays of information as five different panels, such as the Case Summary Panel (which provides a quick list with links for the individual’s activities, and activity tracking capabilities), or the Chronological Case History Panel (which provides a snapshot of the details in the Case Management – Programs tab, that can be filtered by service type).
Each of the four summary panels, which provide at-a-glance information about case records, activities, background, recent case history, or general individual information, are briefly described in the following topics.

**Note:** If your system includes integrated GUS modules, there will also be additional summary panels (e.g., Unemployment Appeals Summary, Claim History and Work Search Summary panels), which will be indicated GUS Staff User Guide.

**Summary Tab – Case Summary Panel**

The Case Summary Panel displays four standard sections of summary data arranged by:

- **Activity Summary:** A list of links to activity types, such as case notes, service records, job referrals, referrals to providers, résumés, job applications, saved virtual recruiter job alerts, new messages created, appointments created, etc.
- **Case Management Summary:** Case and program management types, such as WIOA registrations or TAA outcomes
- **Employment History Summary:** Previous employer data
- **Education History Summary:** Education degrees/certifications

Details on each of these areas can be hidden or displayed by clicking Hide/Show. Each area also has links from the item/title which allow you to view and maintain the details. For example, you can access...
internal job referrals from the Activity Summary by clicking the Internal Job Referral(s) link in the row listing the earliest and latest referral.

Summary Tab – Chronological Case History Panel

A quick starting point to review a case is the Chronological Case History panel, which gives a snapshot of the details in the Case Management Profile – Programs tab. This summary can be filtered for just the Programs you want to view.

The Chronological Case History panel displays the case history data in chronological order, from the most recent item to the oldest. The middle section of this panel lets you check which types of case history information to display (e.g., programs such as WIOA or TAA, Appointments, Case Notes, Résumés). The bottom of the panel shows the rows for each item in the filtered list (once the Filter link has been clicked to filter for the checked items).

As with the Case Summary panel, details on each item in this chronological list can be accessed by clicking a View link in the Action column, which will display the page for viewing/maintaining details on that item. For example, clicking View for a history item for WIOA Application Creation will display the page that summarizes the WIOA Application Information for the selected Individual.
Summary Tab – Individual Information Panel

The Individual Information panel displays a summary of the general information for that individual. Clicking the client’s name will take you to the General tab under the Personal Profile. If displayed, clicking the Alternate Contact name at the bottom of this screen will take you to the details for that contact.

Note: The Individual Information panel includes case manager, LWIA / region, and one-stop office.

Summary Tab – Verification Summary Panel

Staff are required to verify data at certain points in programs management (such as a WIOA, TAA and other program applications, as well as certain enrollments, follow ups, and case closures). These verifications are recorded “in-context” at the point at which the data is entered (e.g., verifying the SSN with a Social Security Card by clicking the Verify link and selecting from the list of document types). The Verification Summary Panel lets staff see a quick listing of all the verifications recorded, which can be sorted by programs. The view can also be filtered to display all the verifications points that did not have document types entered for verification information.

In other words, the Verification Summary panel displays a quick summary of all verifications that were performed or recorded. This usually occurs in-context, as part of step-by-step program applications.

The advantage of seeing all of the verifications for the individuals from this Verification Summary panel is that staff can display all verifications, and they can quickly and
easily filter for programs type, and for only verifications available (already made), or for verifications not available (not made).

**Summary Tab, Verification Summary Panel (Displaying Available WIOA Program Verifications)**

Although the Verification Summary panel is not where verifications are made or identified (that is done through in-context links at the point of creating an application, participation, or enrollment record), the Verification Summary panel summary lets staff quickly view all the verifications already made for a specific program application. It also lets them isolate all the verifications which still may be needed. This can be particularly helpful if an individual has begun a process (such as a WIOA application) and is making an appointment to come into a OneStop office to complete the process. For example, a staff member can quickly view the verifications not made for a specific application, and identify documents that the individual may need to bring for verification as they complete their WIOA application. Or they may view only a WIOA application’s associated and available verifications (as shown in the previous figure).

The Verification Summary has three types of controls to filter which types of verification are displayed:

**Filter Programs:** The Verification Summary initially displays with a checked box for each program that is currently active for the individuals (e.g., Wagner-Peyser, WIOA, and TAA). Unchecking or checking the boxes will automatically update the display to include the group of verifications related to that program.

**Filter Verifications:** The initial *Display All* shows all verifications (e.g., *available* or identified verifications for a program, as well as *not available* verifications, which includes each of the verifications potentially associated with the programs applications which have not been selected or identified yet). For example, a partial WIOA application may have a fair amount of both
types. You can select the other radio buttons to Display Available verifications only, or to Display Not Available verification only. Checking either radio button will automatically update the display for only those verifications.

**Expand All / Collapse All:** The initial display shows the verifications in a collapsed view, showing only the program name. You can click the Expand All link to expand the display so that every type of application not filter out is displayed, or you can manually click the + and or - the links to expand specific program, application, and/or participation and follow up records to display only those related verifications. The figure at right shows a partial screen expanded for only the verifications specifically related to the individual’s WIOA program Objective Assessment Verifications.

The verifications as a table for each program, with three columns:

- **Verify:** This column lists each verification element in the application which requires staff to identify a document used (e.g., a “Date of Birth or Age Verification”).
- **Description:** This column indicates “Not Available” if no verification was performed. If it was, the selection that staff chose (from a drop-down list) for the verification document is displayed (e.g., “B - Birth Certificate” for Date of Birth and Age Verification).
- **Action:** This column has links to Scan, Upload, Link, or View the actual document used as the verification. The first three links are not rarely used on this panel (the document should be attached when verifying data while completing the application). Normally, the View link is the only link used from the Verification Summary Panel.

**Viewing Documents in Verifications List**

The table that displays the summary of associated verifications includes three columns:

- **Verify** indicates the name of the verification (which was displayed next to the Verify link where it (e.g., in a tab of the applications),
- **Description** indicates the selection made for the type of verification document used (e.g., if a birth certificate was selected as the second option in the list for age verification this might be B – Birth Certificate).
- **Action** lets staff click View to see the associations for the verification, and see the actual document if it was scanned or uploaded (shown at right). If a verification was made, but no document was acquired, a message will indicate that there are not matching document. If you click view, and there is not verification made, a message displays that “a selected verification document is required before viewing its image.”

**Note:** The purpose of the Verification Summary Panel is not for “document management”. That is, it is not the intended area to upload or scan documents. It is a tool to review the different “document-related” verifications which are required as part of a specific program’s application and those that have been made. However, if a verification has been made, but no image was acquired, clicking Scan or Upload on this screen will let staff acquire the image, and will prefill the Document Association area, based on the verification data. However, the scan or upload should normally be performed as part of the process of the program application, participation or activity enrollment. All abilities to view or acquire images depend both on whether the site includes Document Management, and the staff member has appropriate privileges.
See Chapter 30 - Manage Documents and the topic, In-Context Scanning, Linking, and Viewing, for more on acquiring documents.

**Case Notes Tab**

Click the Case Notes tab to view, add, or edit a case note. This will allow you to document an event or observation for this individual.

**Note:** *Only staff with the proper privileges may edit existing case notes.*

From the Case Notes tab (shown in the following figure) you can perform the following tasks:

- Click the **Show Filter Criteria** link to filter the case notes displayed by various search criteria (similar to the example shown here).
- To sort case notes, click a desired heading column heading once for ascending, or twice for descending order.
- To view a particular case note, click its subject link.
- To print all case notes, click the column heading checkbox and click **Print Selected Case Notes** to access the print preview window.
- To print select case notes, click the checkboxes for the desired case notes and click **Print Selected Case Notes** to access the print preview window.
- To create a new case note, click **Add New Case Note**. For details, refer to the next section.
- To create a case note template, click **View Case Note Templates**. For details, refer to the section that follows.

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**Case Notes Tab**

Certain Case Notes like Case Assignment updates are system generated.
Note: Using My Staff Account, you may select a default case note display order (oldest to newest, or newest to oldest, based on the contact date or the create date).

The Case Notes tab includes certain case notes that are auto-generated. For example, each time a case has been re-assigned, the system auto-generates a case note with the date of assignment and the new case manager’s name. (It also writes a record to the case assignment history table.)

Create a Case Note Template

By creating case note templates, staff may quickly and easily create case notes by selecting an existing template. The system will auto-fill each required field based on data recorded in the template. Staff perform the following steps to create a case note template:

- From the bottom of the Case Notes tab click the View Case Note Templates link.

A list of existing case note templates displays, along with a link that lets you create a new template. The system automatically defaults to either individual templates or employer templates depending on whether you are assisting an individual or an employer, as shown in the following sample:

![Case Note Template List and Creation Screen]

- Click Create New Template.

There are three sections to the screen: Template Identifier, Template Restriction, and Case Note Content, as shown in the following sample:

- **(Required)** Name the template. The template type will automatically default to Individual or Employer based on the user type you’re currently assisting.

![Create New Template Screen]
(Required) Indicate any template restrictions, such as who can use the template (e.g., only you, staff in LWIA, all staff).

- (Optional) Select the Program affiliation for this case note.
- (Optional) Select the appropriate Local Workforce Investment Area (LWIA).
- (Optional) Select the appropriate office to which you and the customer belong.
- (Optional) In the Case Note Content section, click the box to suppress the case note, if applicable. Accordingly, only staff members with access to case notes for this workforce region may view suppressed case notes. This protects the individual, should confidential or sensitive information be entered.
- (Optional) Select the appropriate partner program (for example, Vocational Rehabilitation) for this case note, if applicable.
- (Optional) Type a descriptive title in the Subject box.
- (Optional) Select the appropriate form of contact from the drop-down box.
- (Required) Enter case note description details. When you have finished typing the case note, click the Spell Check link to check for errors. See Appendix A – Common System Tools for details.
- (Required) Click Save to save the case note template. The system displays a screen similar to the one below:
If you fail to provide information for any optional step, you will be required to manually enter this information to save a case note created using a case note template. You can edit or delete a Case Note template, create a new template, or return to the Case Notes tab.

**Note:** If you fail to provide information for any optional step, you will be required to manually enter this information to save a case note created using a case note template.

### Add a Case Note

When you click the **Add New Case Note** link, the system displays the Case Note Composition screen, a sample of which follows:

**Case Note Composition Screen**

You can auto fill a case note with an existing template. In this case, the template auto filled basic contact follow up text.

With Document Management, you can also click **Add a Document or Scan a Document** to attach external documents to a case note.
To create a case note, perform the following steps:

1. (Optional) Select a desired template to auto-fill the case note screen. You must complete any required fields the case note template omits.
2. Check the box to suppress the case note, if applicable. Accordingly, only staff members with access to case notes for this workforce region may view suppressed case notes. This protects the individual, should confidential or sensitive information be entered.
3. Enter the date you established contact with the customer (for the purpose of this case note). The system automatically records the create date based on the system date.
4. Select the Program affiliation for this case note. As a result, the system displays the individual’s application ID for the selected program.

Note: Your system configuration determines whether staff may create case notes for individuals who are not program participants.

5. Select the appropriate Local Workforce Investment Area (LWIA).
6. Select the appropriate office to which you and the customer belong.
7. (Optional) Select the appropriate partner program (for example, Vocational Rehabilitation) for this case note.
8. Enter a descriptive title in the Subject box.
9. Select the appropriate form of contact from the drop-down box.
10. Enter case note details. Click the Spell Check link to correct errors. See Appendix A for details.
11. (Optional) To create a system message to be shared with desired recipients, click the Create Message From…checkbox. When the page redraws, select the desired delivery method(s).

Note: If your system includes the Document Management module, you can click the Add a Document or Scan a Document link to add or attach images of documents associated with the case note.

12. Click Save to save the case note.

Note: Your staff privileges determine whether you can edit saved case notes.
**Activities Tab**

The Activities tab maintains a variety of information about the individual that helps staff to manage the individual's account. Your staff member privileges control access to each option, and the capacity within which each may be used. The following figure displays a sample Activities tab screen:

You can manage the following information for an individual using this screen:

- **Internal Job Referrals** – Create a job referral to an internal job, or manage job referral results for the selected individual. For more information, refer to the next section.
- **Activity History/Service Plan** – Access details of the individual’s Wagner-Peyser service record. For more information, refer to the section “Activity History/Service Plan.”
  
  *Note:* Your system may provide service record information for multiple programs, not just Wagner-Peyser.

- **Employment History** – View or edit existing work experience information, or add a new work history record for the selected individual. For more details, refer to the section “Employment History” on page 4-19.
- **Alternate Contacts** – View alternate contact information for persons related to the selected individual. For more details, refer to the section “Alternate Contacts.”
- **Event History** – View the individual’s scan card activity history by selecting a desired event. For more details, refer to the section “Event History” on page 4-20.
  
  *Note:* The Event History link applies only to the VOScan module subscription using programmable scan card terminals.

- **Staff Referrals to Providers** – Track service referrals for the selected individual. Typically these service providers work outside of the system’s programmed functionality (for example, they are non-WIOA or non-WP providers). For more information, refer to the section “Staff Referrals.”
- **Wage Information for Program Participant** – Confirms whether quarterly wage information is available for the selected individual. For more information, refer to the section “Wage Information” on page 4-31.
- **Local Status Tracking** – Displays details of the individual’s service record for specific activities related to local activity status tracking codes that are set up unique to a specific LWIA/Region for local tracking or reporting purposes.
Note: Local Status Tracking is an optional feature implemented for a limited number of customers and may not be available in your system. For more information, refer to the section “Local Status Tracking” on page 4-31.

Internal Job Referrals

Use the Internal Job Referrals option to manage job order referral information for the selected individual. When you click the Internal Job Referrals link on the Activities tab, the system displays a screen similar to the following figure:

![Referrals Screen]

You may perform the following tasks from this screen:

- View/record referral results – click the Results link for a desired job order. For details, refer to the "Record Job Referral Results" topic that follows.
- Click the Print link to print the job referral.
- Create a job referral – click the Add a Referral button. For details, see the "Add a Referral" section.

Record Job Referral Results

Job referrals may be either user- or staff-generated, depending on the nature of the job order. When you click the Results link for a desired job referral, the system displays a screen similar to the following figure:

Perform the following steps to record Applicant Status results:

1. Select the appropriate referral result from the drop-down list. Choices include In Progress, Hired, or Not Hired:
   a. If you selected Hired, enter the person’s date of hire by:
   b. Type the date using MM/DD/YYYY format (for example, 07/15/2005), or
   c. Click the calendar icon to select month, date, and year, or select the Today link.
2 If you selected **Hired**, type the person’s reported starting salary wage. If not hourly, the system will convert it to hourly.

3 Enter details in the Comments text box if applicable.

4 Click **Save** to secure your edits, or **Cancel** to exit.

### Add a Referral
To create a job referral for the selected individual only, click the **Add a Referral** button on the Referrals screen. This will start the job search by opening the Advance Job Search tab as the first step in creating an Internal Job Referral.

**Note:**  *The tab will open with the last five jobs viewed by the individual as links at the top of the search tab.*

(See the topic “Mass Job Referrals” in chapter 13 - Manage Labor Exchange, for details on making a job referral.)

### Activity History/Service Plan
The individual’s activity history (or service plan) is a list of activity services provided to the individual within the Wagner-Peyser (WP) program.

**Note:**  *Your system may display additional program services, for example, Workforce Investment and Innovation Act (WIOA) or Unemployment Insurance (UI).*

Some of these services may have been manually entered by staff, while others were automatically recorded by the system (for example, job referrals, labor market research, and others). Most often, those WP activity services recorded by the system do not display a scheduled date/time value on the list screen.

For staff to manually record WP services provided to the individual, the Wagner-Peyser Program Application and Wagner-Peyser Program Participation forms must be completed. Both forms are maintained in the Programs tab folder (for details, see page 4-35).

When you click the **Activity History/Service Plan** link in the Activities tab folder, the system displays a screen similar to the following figure:
Note: You can click the Show Filter Criteria link to show a filter control, which lets you filter to specific service types, dates, or other service criteria.

Click from the Action column to view, delete, or print the Service details.

Service Plan Information Screen

From this screen, you can perform the following tasks:

- To open a filtering control and enter criteria to limit the displayed services, click the Show Filter Criteria link. Use the control to pick criteria, and click Filter.
- To manually add a single service to the individual’s service plan, click Add Service. For details, refer to the Add Service topic that follows.
- To manually add multiple services to the individual’s service plan, click Add Multiple Services. For details, refer to the section “Add Multiple Services” on page 4-18.
- To print the individual’s entire service list, click Print Table link. This will open a separate window for the table view of the service and you can select Print at the bottom of that window.
- To access specific activity service details, click the desired View link.
- To remove an activity service, click its Delete link.

Note: The system deletes only job referrals that have no recorded referral result.

Add Service

To manually add a single Wagner-Peyser activity service to the individual’s service plan, click the Add Service link. At this point, the system verifies that the individual’s Wagner-Peyser Program application...
and Wagner-Peyser Participation form – maintained in the Programs tab folder – have been successfully completed. If not, the system will display an alert similar to the following message:

⚠️ You cannot add activities due to no eligible WP Participation record.

Otherwise, if the prerequisite forms are complete, the system displays an entry form (as shown in the following figure).

To add a single Wagner-Peyser service to the individual’s service plan:

1. Select a desired service/activity code from the list box.
2. (Optional) Select the new activity’s scheduled start date by:
   - Typing the date in the Scheduled Date box in MM/DD/YYYY format, OR
   - Clicking the calendar icon next to the Scheduled Date box. Use < > arrows to select the month, and << >> arrows to select the year. Then, click the day of the month to create that date, and click Select to save the changes.
3. (Optional) Create the new service activity’s scheduled time (hour, minutes, AM or PM) by selecting the desired values from the Scheduled Time drop-down list.
4. Enter the actual start date for the activity as described in Step 2.
5. Select the appropriate completion code from the drop-down list.
6. Select your Local Workforce Investment Area (LWIA) if different from the default display value.
7. Select your office affiliation if different from the default display value.
8. Select your position (Staff, LVER, DVOP) if different from the default display value.
9. (Optional) Click the Add a new Case Note link to add a case note to the individual’s file. For details, refer to the Case Notes topic on page 4-8.
10 Click **Save Changes** to secure your edits, or **Cancel Changes** to exit without saving changes. When complete, the system will display the updated Service Plan Information screen.

**Add Multiple Services**

If you need to account for several WP activity services provided to the individual, you may record these services simultaneously, rather than one at a time.

**Note:** As with adding a single WP service, the individual's Wagner-Peyser Program application and Wagner-Peyser Participation form – maintained in the Programs tab folder – must have been successfully completed before manually recording services provided. For details, see chapter 5 - The Programs Tab: Wagner-Peyser for more information.

When you click the **Add Multiple Services** link, the system displays a screen similar to the following figure:

To add multiple Wagner-Peyser services to the individual’s service plan:

1. Select your Local Workforce Investment Area (LWIA) if different from the default display value.
2. Select your office affiliation if different from the default display value.
3. Select your position (Staff, LVER, DVOP) if different from the default display value.
4. Click the checkboxes for the desired activity services provided.
5. Type the appropriate activity date using MM/DD/YYYY format in the Scheduled Date box if different from the default display value (system date).
6. (Optional) Select the appropriate activity time (hour, minutes, AM or PM) by selecting the desired values from the Scheduled Time drop-down lists.
7. Type the activity’s actual end date using MM/DD/YYYY format if different from the default display value.

**Note:** The system will not accept future dates in this field. To minimize potential error, record the service once it has been provided.
8 (Optional) Click the Add a new Case Note link to add a case note to the individual’s file. For details, refer to the “Case Notes” topic on page 4-8.

9 Click Save to secure your edits, or Cancel to exit. When complete, the system will display the updated Service Plan Information screen.

**Employment History**

The system maintains the individual's employment history record in several places, including:

- Personal Profile > Background tab
- Case Management Profile > Activities tab (Employment History link)
- Case Management Profile > Programs tab (Common Intake form, Wagner-Peyser Application form, WIOA Application forms)

Any modifications made to this employment history record, whether individual or staff-generated, automatically update in each holding place in the system. This reduces data entry effort, and maintains a uniform record for timeliness and accuracy purposes.

When you click the Employment History link in the Activities tab folder, the system displays a screen similar to the following figure:

From this screen, you can perform the following tasks:

- Click Edit in the Action column (or the hyperlinked name of the company) to modify the employment history.
- Click Delete in the Action column to remove the employment history.
- Click Add a new Employment History to create a New Employment History screen (see sample screen below).

![Employment History List Screen](image-url)
Event History

VOScan is a service tracking option that may be employed to record details of an individual’s service plan. Depending on the scan card terminals purchased, staff may pre-program these terminals to automatically record activities when the individuals’ cards are swiped at an event (for example, a résumé writing workshop). To access detailed information for the scan card events the selected individual has participated in, click the Event History link on the Activities tab folder (see sample screen below).

Note: This service option only applies to the VOScan (Scan Card) module. If you did not purchase this option, refer to the Activity History/Service Plan topic that follows.
To view event details, click a desired View Details link. The system displays a screen similar to the following figure:

You may create a date range filter search to view a particular event log. Using the Event History screen, enter both the Minimum (Begin) and Maximum (End) Dates by:

- Typing the date using MM/DD/YYYY format (for example, 07/15/2005), or
- Clicking the calendar icon to select the month, date, and year.
- Clicking Search to execute the search.
From the Activities tab of the Staff's Profiles, click the Alternate Contacts link to view, modify, or create personal contact information for the selected individual. These records serve as points of contact when you cannot reach the selected individual. The following figure displays a sample Contacts List screen:

- View or modify an existing record by clicking its Edit link.
- Add an alternate contact record. For details, refer to the following topic.
Add Alternate Contact Information

To create additional persons of contact for the selected individual, click the **Add Contact** button. The system displays a screen similar to the following figure:

![Add Alternate Contact Screen](image)

You are required to provide at least the alternate contact’s name, phone number, and relationship to the individual you are serving. As a professional courtesy to fellow staff, complete the entire screen, and record an “as of” date if this contact is no longer available. Click **Save** to secure your edits.

Staff Referrals to Providers

The purpose of this option is to track referrals that staff members make on behalf of system registered individuals for provider services operating outside of system programs (i.e., WP or WIOA). For example, staff can manage individuals who receive WIOA services, but must create a staff referral for a skill assessment through Vocational Rehabilitation Services.

To properly utilize this referral tracking component, staff perform the following:

- Define the types of referrals that will be tracked
- Create referral details, including service provider information
- Record referral results

**Note:** A referral is a “form” used to introduce the individual to another program or provider of service and to provide a description of the type of service the individual is seeking from the provider.
When you click the Staff Referrals link from the Activities tab folder, a screen similar to the following will display:

![Staff Referrals Screen](image)

From this screen, you can perform the following tasks:

To control the referral types displayed, select the desired filter display option (All, Open, Completed, Inactive).

- To modify an existing referral, including recording referral results, click its Edit link.
- To deactivate an existing referral, click its Inactivate link.
- To create a new referral, click Add Referral.
- To create a master list of referral types, click Manage Types.
- To create a master list of referral outcomes, click Manage Results.

Manage Referral Types

As a prerequisite to creating actual referrals, staff must first complete a list of referral types. These completed values will appear as check box items on the Add a Referral screen, and are necessary for referral completion. When you click the Manage Types link, the system displays a screen similar to the following figure:
Note: Your staff member privileges determine region accessibility to referral types.

You may perform the following tasks from this screen:

- To modify details of a particular referral type, click its Edit link. For an explanation of the various fields that comprise this record, refer to the “Add Referral Type” topic that follows.
- To deactivate an existing referral type, click its Inactivate link. To reactivate an existing referral type, click its Activate link.
  
  **Note:** Referral types cannot be deleted; only deactivated.

- To create a new referral type, click Add Referral Type. For details, refer to the topic that follows.

### Add Referral Type

When you click the Add Referral Type button from the Referral Type List screen, the system displays a screen similar to the following figure:
Add Referral Type Screen

**Perform the following steps to add a new referral type:**

1. Click the **Active** radio button for referral type status. If left blank, the system will default to Active.
2. Type a description for the type of referral (for example, “Referral to Medical Provider for Individual Counseling”).
3. Select your Local Workforce Investment Area (LWIA) or Region if different from the default display value.
4. Select the program affiliation for this referral type.
5. Select whether the system will automatically record a service activity to the individual’s service plan as a result of successfully creating a referral of this type (Yes or No).
6. (Optional) Select all the appropriate activity services that will automatically be recorded in the individual’s service plan as a result of successfully creating a referral of this type. Do this only if you selected Yes in the previous step.
7. Click **Save** to secure your edits, or **Cancel** to exit. When complete, the system will display the updated Referral Type List screen.

**Note:** You must first save the referral type before printing it.
Manage Referral Results

Like managing the types of referrals to choose from, you will also need to create a list of referral results that staff may choose from to successfully complete and track individual referrals. When you click the Manage Results link on the Staff Referrals screen, the system displays a screen similar to the following figure:

![Referral Result List Screen](image)

You may perform the following tasks from this screen:

- To modify details of a particular referral result, click its Edit link. For an explanation of the various fields that comprise this record, refer to the "Add Referral Result" topic that follows.
- To deactivate an existing referral result, click its Inactivate link. To reactivate an existing referral result, click its Activate link.
  
  Note: Referral results cannot be deleted; only deactivated.
- To create a new referral result, click Add Referral Result. For details, refer to the topic that follows.

Add Referral Result

When you click the Add Referral Result button from the Referral Result List screen, the system displays a screen similar to the following figure:
Perform the following steps to add a new referral result:

1. Click the Active radio button for referral type status. If left blank, the system will default to Active.
2. Type a description for the type of referral result (for example, “Successfully Completed”).
3. Select your Local Workforce Investment Area (LWIA) or Region if different from the default display value.
4. Select the program affiliation for this referral result.
5. Select whether the system will automatically record a service activity to the individual’s service plan as a result of successfully recording this referral result (Yes or No).
6. (optional) Select all the appropriate activity services that will automatically be recorded in the individual’s service plan as a result of successfully recording this referral result. Do this only if you selected Yes in the previous step.
7. Click Save to secure your edits, or Cancel to exit. When complete, the system will display the updated Referral Result List screen.

Note: You must first save the referral result before printing it.
Add Referral for Service

Because a referral is a form used to introduce an individual to another program or provider of service, it provides a description of the type of service the individual is seeking from the provider, as well as provider details. You will also use the referral to record referral results, once the service or program has terminated. When you click the Add Referral button from the Staff Referrals screen, the system displays the Add Referral page, a sample of which follows:

![Add Referral Screen]

Perform the following steps to add a new referral (General Information section):

1. Select your Local Workforce Investment Area (LWIA) or Region if different from the default display value.
2. Select your office affiliation.
3. Select the referral’s create date by:
   - Typing the date in the Date of Referral box in MM/DD/YYYY format, …Or…
   - Clicking the calendar icon next to the Date of Referral box. Use < > arrows to select the month, and << >> arrows to select the year. Click the day of the month to create that date, and click Select to save the changes.
4. Select the appropriate program affiliation for this referral.
5  (Optional) Confirm the accuracy of the remaining items in this section (Social Security number, name, address, and contact information) and, if necessary, click Edit Individual Profile to make updates. Enter the information in the display window, and click Save to return to this screen.

➤ Perform the following steps to add a new referral (Type of Referral section):

1  Select the desired checkboxes indicating the referral type(s). If the referral type is unique (or you do not have other choices), click Other and provide a description in the Other Description text box.

2  Record details explaining the reason for the referral using the Reason for Referral text box.

3  Record other referral details using the Additional information regarding referral text box.

➤ Perform the following steps to add a new referral (Provider Information section):

1  Click Search for Provider to conduct a keyword search for the desired provider. The system displays a window to enter search criteria for a provider.

   Note: Only customers who have the Individual Fund Tracking module with the ability to Manage Providers can use this automatic search tool. Otherwise, go to Step 4.

2  Type your search criteria and click Submit.

3  From the matching provider display list, click the desired provider name link. If you cannot find your provider, click Search Again and repeat Step 2.

   Note: The remainder of the form requires manual data entry ONLY if you did not successfully use the Search for Provider function.

4  Type the name of the service or program provider in the Provider Name field.

5  (Optional) If you successfully used the Search for Provider function in Steps 1–3, and the selected provider has active course/service offerings, you may select the desired service from the drop-down list. Otherwise, this field will not be available.

6  (Optional) If you successfully used the Search for Provider function in Steps 1–3, and the selected provider has active locations for the selected service, you may select the desired location from the drop-down list. Otherwise, this field will not be available.

7  Type the provider’s address in the Address 1 (and if applicable, Address 2) field.

8  Type the provider’s city.

9  Select the provider’s state.
10  Type the provider’s ZIP Code.
11  (Optional) If you successfully used the Search for Provider function in Steps 1–3, and the selected provider has active contracts, you may select the desired contract from the drop-down list. Otherwise, this field will not be available.
12  Type the contact person’s name for this provider location.
13  Type the contact person’s 10-digit phone number.
14  (Optional) Type the contact person’s e-mail address.
15  Click Save to secure your edits, or Cancel to exit. When complete, the system will display the updated Staff Referrals screen.

   Note:  You must first save the referral before printing it.

Wage Information for Program Participant

This page displays wage indicators available for participation in each program, by quarter (if federal wage data are available for each quarter after exit quarter). To maintain confidentiality required of unemployment insurance data, actual wages are not shown, only the following indicators:

- Wages Exist, shown as Yes
- Wage Not Available, shown as Not Available
- Wages do not exist, shown as No

Local Status Tracking

The local status tracking option is used by customers to help staff track and list unique services/activities provided to the individual which are identified for local or regional tracking needs, independent from standard federal activities. For example, certain LWIAs or regions may need to track the number of
Individuals frequenting one-stops, so they will create a local activity code used for all individuals initially beginning any service at the one-stop center. Another example might be creating a local activity code for Initial Assistance Workshops conducted in Spanish, to track attendance specifically for those workshops.

If your system has this configuration for Local Status Tracking, then you as a staff member can use the option to review and track a selected individual’s existing local activities, and you can assign new local activities/services.

**Note:** The possible local activities are defined through the Admin system, and include LWIA/Region associations. Unless you are state staff, you will be limited to adding or entering only the local activities associated with your LWIA/Region.

When you click the Local Status Tracking link in the Activities tab folder, the system displays a screen similar to the following figure:

**Note:** You can use the Show Filter Criteria link to show the filter control, which lets you filter to specific offices, date ranges, or local activity codes.

*Click from the Action column to view, edit, or delete the local activity details.*

From the displayed Activities – Local Status Tracking tab, the staff member can:

- Filter the list, using the filtering control to enter criteria and limit the displayed services.
- Review and track the selected individual’s existing local activities.
- Add a single service by clicking Add New Local Activity Tracking. For details, refer to the “Add Local Activity” topic that follows.
- Add multiple services by clicking Add Multiple New Local Activity Tracking. For details, refer to the section “Add Multiple Local Activities.”
- View/edit specific activity details, by clicking the desired View link.
- Remove an activity, by clicking the Delete link.
Note: *If the staff member is state staff, then all LWIA/Regions and associated activity codes can be displayed, and will be accessible in entry screens.*

**Add Local Activity**

To manually add a single local activity for the individual, click the Add Local Activity link. The system displays Local Activity Status, Add screen (as shown in the following figure).

To add an activity for the individual, perform the following steps:

- Select the Local Workforce Investment Area (LWIA).
- Select the office affiliation.
- Select the new local activity.
- Select the new activity’s scheduled date by:
  - Typing the date in the Scheduled Date box in MM/DD/YYYY format, OR
  - Clicking the calendar icon next to the Scheduled Date box. Use < > arrows to select the month, and << >> arrows to select the year. Then, click the day of the month to create that date, and click Select to save the changes.
- Select a completion status.
- Select your position (Staff, LVER, DVOP) if different from the default display value.
- Click **Save** to secure your edits, or **Cancel** to exit without saving changes.

When complete, the system will indicate that the save was successful, and let you return to the updated Activities – Local Status Tracking list.

**Note:** You can also click a button to **Save and Add Another Local Activity.**
**Add Multiple Local Activities**

If you need to account for several local activities provided to the individual, you may record these activities simultaneously, rather than one at a time.

To manually add multiple local activities for the individual, click the **Add Multiple Local Activities** link. The system displays the Local Activity Status, Add screen for multiple entries (as shown in the following figure).

The screen for multiple local activities follows the steps as for a single activity.
Staff Profiles – Case Management Folder

There are four tabs that deal with various aspects of case management in the Case Management folder in the Staff’s Profile:

- **Case Summary** – This tab is identical to the Summary tab in the General Profile folder. See the Summary tab description on page 4-3 for more on the feature and options for this tab.
- **Programs** – This is where staff create the application and the participation forms for various federal programs, and then record the services, outcomes, and closures for a program.
- **Plan** – This is where staff record the Objective Assessment Summary (OAS) Individual Employment Plan/Individual Service Strategy (IEP/ISS) for the individual.
- **Assessments** – This is where assessment results are recorded that are instrumental in determining crucial elements of federal program enrollments.

**Programs Tab**

Staff can access the Programs tab within the Case Management Profile, which contains details of your customers’ involvement in federal programs such as the Workforce Investment and Innovation Act (WIOA) and Wagner-Peyser (WP).

---

**Sample Case Management Profile, Programs Tab (expanded for a WIOA Program & the Enrollments Section)**

**Note:** Additional programs may display on this tab for some Geographic Solutions customers, such as generic programs, TANF, TAA, and WTP. Regardless of the number of programs available, the **Show Filter Criteria** link (at the top of the Programs tab), displays the filtering options. The
options let you choose programs, application and enrollment statuses, and sorting options on which to filter the program data to display on the Programs tab.

**Overview**

The Virtual OneStop system is Common Measures-compliant. Accordingly, customers receiving activity services from a federal program (such as WIOA or WP) will be measured using a set of universal or common benchmarks to help determine program efficiency. Common Measures most profoundly affects Wagner-Peyser program participation, because traditionally case managers could simply record services provided without a formal application and exit process for performance tracking purposes.

In order to ensure the proper documentation of participant information and successfully utilize Common Measures, staff will employ the following approach for the WP, WIOA, and other common measures-compliant programs maintained within the Virtual OneStop system:

<table>
<thead>
<tr>
<th>Step</th>
<th>Form &amp; Section Name</th>
<th>Reason for Use</th>
</tr>
</thead>
</table>
| 1    | Application Form(s) | Helps determine customer eligibility for a federal program. Once the application form is complete:  
- Staff can start participation for the individual.  
- Wizard, Validation, and Print icons (,) will display for easily maintaining the program application.  
WP #123456 – Complete  
LWIA: Sample County LWIA  
OneStop: Sample ABC OneStop  
Total Activities: 6 / 7  
This bar includes the Application wizard, Print and Validation icons, followed by the Application # and status (e.g., WP # 12345678 – Complete). The control expands the section to show the basic data for the application Case Information expandable sections heading for the rest of the forms.|
| 2    | Participation Form | Provides details of the participant’s status before enrolling in the program (for Common Measures reporting).  
This bar expands to show the basic data for the Participation Record created at the end of eligibility determination, which is part of the program application. An Edit Participation link will open the full screen for managing the Case Participation Record. |
### 3 Enrollment Form
Maintains details of the participant’s service record, including dates of service and status.

| Activities / Enrollments / Services | This bar expands to show a table for the activities/enrollments for the individual. A Create Activity/Service/Enrollment link above the table lets you create new enrollments (which are added to the table). |

### 4 Credentials
Allows staff to document and certificates or credentials obtained while enrolled in the program (e.g., diploma, degree).

| Credentials | This bar expands to show a table listing any credentials the individual has received. A Create Credential link above the table lets you enter credential data for credentials the individual earns as part of their enrollments. |

### 5 Case Closure Form
Allows staff to record federal and local performance measures before the program exit occurs.

| Closure | This bar expands to show a table listing any Case Closure record. A Create Case Closure link above the table lets you enter closure information for performance reporting purposes before officially exiting the WP program. |

### 6 Exit (Outcome) Form
Officially terminates participant involvement in a federal program and provides details of the participant’s status after program participation (for Common Measures reporting).

| Exit / Outcome | There are two types of exits in Common Measures—a Hard Exit which has five global exclusions that govern it; and a Soft Exit, which is a normal exit after 91 days of inactivity. |

### 7 Follow-up Form
Provides additional details of the participant’s status after program exit (for Common Measures reporting).

| Follow-Ups | This bar expands to show a table that lists any follow up activities. A Create Local Follow Up link above the table lets you create additional follow up activities that may be part of completing program activities. |

Consistent with Common Measures, participants are considered active as long as they continue to receive services from any federal program in the system, without a lapse in service for 90 consecutive calendar days. For example, although a user may not have received services for 110 days under Wagner-Peyser, if they are still receiving service under WIOA, they are considered an active participant.

The hard exit process is not required for most individuals (the soft exit process is the chief means for terminating a participant’s program enrollment). The soft exit process occurs when the system automatically terminates participant enrollment when the customers DO NOT receive service from a federal program (WIOA, WP) for 90 consecutive calendar days.

**Note:** Your business rules may extend the minimum non-service period required for soft exit beyond 90 consecutive days.

Of course, there are exceptions to this soft exit process. Currently, the federal government recognizes a hard exit to be executed when the customer being served satisfies one of the global exclusions.

**Note:** Completing a program exit form and citing one of the global exclusions as the reason for exit will NOT count such participants in Common Measures for performance reporting purposes.

### Displaying Program Forms
Different forms can be created, and their details can be displayed, by using the links under a program to expand/open each section. The opened area will display a link for creating the related form, and the section will also display information in any existing form, if entries already exist.

To minimize the page scrolling necessary to view and access these links, the system automatically displays the collapsible links on the screen Programs screen as closed, to conceal this information at first
glance. The following figure displays a WP program opened to show the expandable links (and titles) for each of the WP sections.

A Sample Case Management Programs Tab (with Wagner-Peyser Form Sections Shown)

Click the +/- icon to see all the expandable sections for forms within the program.

Wagner-Peyser has the fewest sections (these are common to most programs). Each section can be expanded or collapsed.
Creating/Editing a Program Application – via the Application Wizard

When staff needs to begin a new application for an individual, they click the Create… link directly below the program title. If this is the first time an application is being started for that program, the link is the only item displayed below the heading.

Once a program application has been started, the application will display in a gray block of general program information below the Create… link. The information includes an application number, a status, and three icons at the right of the status. These icons, , are an Edit Application Wizard, a Print Application button, and a Verification Summary button (shown below, for a started WIOA application).

Links to Open the Application Wizard (at Initial Creation or to Edit an Existing Application)

Staff can use the Create… link to start a new application, or the Application Wizard to view/edit an existing Application.

**Note:** Even if staff starts a new application, and only enters data in the first step/tab of the application wizard, when they return to the Programs screen, the incomplete application information will display. They can use the Application Wizard icon to return to the first tab and continue their entry.

When staff members click the Edit Wizard, the system presents the application information in steps/tabs (starting with the first step/tab). Staff can walk through each step, making entries, and clicking the Next button to move through each steps and complete the application.

Staff make entries or edits to the screen for a step, and then click **Next** to navigate through the application, step by step. Completed steps will show in green (as shown in the second step, below)

If they leave and return to the application, they can skip steps they have already completed, and go directly to a desired step.

**Note:** Each time staff clicks **Next**, the system will save any new data entered on the screen for that step/tab, and move to the next step.
WIOA Application Entry via the Wizard (show for the Intro step and the and Contact step)

When staff members complete their entries or edits in each step, the system displays the Eligibility Summary step as the last step of the application. This step will indicate if the individual is eligible, as well as with other eligibility information.

When staff clicks the Finish button from this step, they will return to the Programs tab.

If they completed an Eligible application, the application status will indicate “Complete” on the redisplayed Programs tab.

Although the general steps of the application wizard are similar, separate chapters exist for each program. They detail each of the different steps involved in a program application for the specific program. This includes:

- Chapter 5 – The Programs Tab – Wagner Peyser
- Chapter 6 – The Programs Tab – WIOA
- Chapter 7 – The Programs Tab – TAA

See the applicable chapter for more details on each step of a specific program application.
Creating/Editing a Service Enrollment – via the Enrollment Wizard

Upon successfully completing a program application, and starting the individual’s participation in a program, staff can open the Activities/Enrollment/Services section of the program to create enrollments in an activity or service.

Similar to creating a program application, staff can use a Create Activity link in the Activities/Enrollment/Services section to begin creating a new activity or service.

Once an enrollment has been started, that activity or service will display in an Activities/Services table (as shown below). The table includes the enrollment status, activity code, and dates (actual and projected begin and end dates). It also includes an Enrollment Edit Wizard icon, to the right of the activity code.

To start a new WIOA activity or service (after the application and participation are completed), staff clicks the Create Activity link.

Whether staff click the link to start an enrollment, or the Enrollment wizard link to edit an existing enrollment, the Enrollment Wizard will display the first tab, the General Information tab (shown in the figure on the next page).

The Activity/Enrollment wizard is a series of tabs that staff can use to enter the details for each activity/service enrollment that they need to add or edit for the program participant’s service record. The wizard displays seven tabs for entering or maintaining enrollment data (including General Information, Service Provider, Enrollment Cost, Financial Aid, Enrollment Budget, and Closure Information tabs).

For basic non-fundable services (services that do not require identification of funding and budget streams), some tabs will not apply and can be skipped. For career services, particularly for individualized services that require funding streams, all tabs will apply, and approved service providers will be associated with selections in the appropriate tabs.

The last tab of the Enrollment wizard, the Closure Information tab, does not require entry until the service or activity is being completed (with a Successful Completion or an Unsuccessful Completion status), and the last activity date to correspond with that closing status.

Staff click a Finish button from this tab, when they are closing the activity for an enrollment record.

**Note:** Some enrollments, such as training courses, may stay open for many months before they are closed successfully.
Sample Service Enrollment Form via the Enrollment Wizard

Although the seven enrollment tabs for the program are similar in most programs (e.g., WIOA, TAA, Adult Ed, WTP, Generic), separate chapters exist for each program. Each of the program chapters include details for adding/editing enrollments for that program (including details such as the different customer program groups that may apply for a specific program). See more details in the enrollment topic in each applicable program chapter.
Plan Tab
The Plan tab lets staff create and manage a customer’s career goals and skills assessments as part of providing Objective Assessment Summary (OAS) or Individual Employment Plan (IEP). This information provides a comprehensive plan (i.e., a needs analysis) that helps direct the nature and number of program services provided to the individual.

Depending on your state and local OneStop business rules, you need to create an OAS or an IEP (along with the basic plan and specific goal entries), before you enroll an individual into any services for the appropriate program.

If so, staff will start by choosing a Create button, for OAS or IEP, from the options on the Plan tab (shown below):

- **Create Objective Assessment Summary (OAS)** – Record and analyze an overview of the individual’s academic levels, skill levels, and service needs. For details, see the next topic.
  - **Action Column** – Click the link in the Action column to Edit, Delete, or Print an existing Objective Assessment Summary.
- **Create Individual Employment Plan (IEP)** – Plan, record, and track employment and career goals, appropriate achievement objectives, and the appropriate services for the customer served.
  - **Action Column** – Click the link in the Action column to Edit, Delete, or Print an existing Individual Employment Plan.

### Objective Assessment Summary

<table>
<thead>
<tr>
<th>#</th>
<th>LWIA/Region</th>
<th>Office Location</th>
<th>Program</th>
<th>Staff</th>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>23</td>
<td>Durham Workforce Development Board</td>
<td>NCWorks Career Center-Briggs Avenue</td>
<td>Title I - Workforce Development (WIOA)</td>
<td>Fink, Ellis</td>
<td>01/28/2019</td>
<td>Edit Delete Print</td>
</tr>
</tbody>
</table>

Create Objective Assessment Summary

### Individual Employment Plan/Service Strategy

<table>
<thead>
<tr>
<th>#</th>
<th>LWIA/Region</th>
<th>Office Location</th>
<th>Status</th>
<th># of Goals</th>
<th>Staff</th>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>Cape Fear Workforce Development Board</td>
<td>Brunswick County Workforce Center</td>
<td>OPEN</td>
<td>1</td>
<td>Fink, Ellis</td>
<td>01/30/2019</td>
<td>Edit Delete Display/Print</td>
</tr>
</tbody>
</table>

Create Individual Employment Plan/Service Strategy

Sample Plan Tab Screen

### Objective Assessment Summary (OAS)
The primary purpose of the OAS form is to satisfy program needs for recording results of Vocational Skill Assessments or Objective Assessment activities. The data collected in the assessment process for employment and training programs is commonly used to assess vocational skills and aptitudes as related to employability, job seeking and job keeping skills, and may be used in the analysis and development of Employment Plans/Service Strategies. The system can associate an OAS record to an open Individual
Employment Plan (IEP) by letting you save the plan number (and print it on the OAS record). However, there is no built-in logic to associate OAS results to Goals and Objectives set in the IEP/ISS record. This form is provided as a data collection interface for purposes of storing information for retrieval in print documents and or customer reporting (not VOS standard reports). Each program (e.g., WP, WIOA) will create its own assessment record and can be associated to particular applications (if an application is “active” and present in VOS for the program).

Due to the length of the OAS interface, the design incorporates a wizard that presents several screens to the user. Within this design, staff must click the Next and Finish buttons to save data to the database. The “jump” links at the top of each screen allow staff to skip data entry screens they do not wish to complete. They are available only after the required data entry fields have been saved.

To create an Objective Assessment Summary (OAS)

- Click the Create Objective Assessment Summary button, from the Plan tab of the Case Management Profile.

This starts an OAS wizard, and displays the first General screen (shown in the figure below).

OAS Screen 1 – General

In the General Information section:

- Select the program for which you’re creating the OAS. If the individual is not currently enrolled in the selected program, the system will display a pop-up alert.
- Select your LWIA and office affiliation.
- Enter the create date for the OAS.
- Select whether to attach an active Individual Employment Plan (IEP) to the OAS. If yes, enter the plan ID.

**Note:** You can only select to attach an active plan, if an IEP already exists. You will get a pop-up error message if no IEP exists.

In the Contact Information section:

- Confirm all address/contact details.
• Make any changes, if necessary.

In the **Alternate Contact** section:
• Click the **Click Here** link to manage contact information for persons known to the individual. For details, see “Alternate Contacts” on page 4-22.

In the **Staff** section:
• You staff ID and the Date Completed will display automatically.
• Compose a note (if desired) in the Overall Note text box.
• Click **Next** to save your edits and continue to the next page (the Expectation page).

⚠️ **Starting with the second page, Expectation, you will see five buttons at the bottom of each screen of the OAS wizard. These function the same on each page. They are:**
- **Back** to return to the previous screen (without saving your changes on this screen).
- **Cancel** to escape the wizard (without saving your changes on this screen).
- **Finish** to save your edits and return to the Plan tab.
- **Print** to access the print dialogue box (the system will only print saved information).
- **Next** to save your edits and continue.

### OAS Screen 2 – Expectation

![OAS Screen 2 – Expectation](image)

**Objective Assessment (Expectations, Screen 2)**

In the **Program Expectations** section:
• Indicate whether the individual seeks immediate employment.
• Record desired services (for example, career counseling, work readiness, etc.).

In the **Employment Expectations** section:

• Identify up to three desired occupations. For details, see the topic “Selecting an Occupation” in Appendix A.

  **Note:** Some data on this page (such as the desired occupation 1, 2, and 3, may be pre-populated based on selections save in the individual’s background data. The data can be changed on this screen, for OAS purposes).

• Identify desired job attributes, such as Employment Type, Full or Part Time, Shift Preferences, Desired Salary, etc.

• Identify required benefits, requested job search assistance, and other requested career planning or training service data, as appropriate.

• Click **Next** to save your edits and continue to the next page.

**OAS Screen 3 – Education**

In the **Education History** section:

• Record the individual’s highest grade completed and current school status.

• Type comments to summarize their education history.

  **Education History**
  
<table>
<thead>
<tr>
<th>General</th>
<th>Expectation</th>
<th>Education</th>
<th>Degree</th>
<th>Certificate</th>
<th>Employment</th>
<th>Household &amp; Income</th>
<th>Work Readiness</th>
<th>Barriers</th>
<th>Criminal Background</th>
<th>Tests</th>
<th>Referrals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highest Grade Completed</td>
<td>High School Diploma</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Currently Enrolled in School</td>
<td>No, Not Attending Any School</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education History Assessment Summary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

  **Basic Skills / Education Factors**

  | High School Dropout | | | | | | | | | | |
  | Basic Skills Deficient | | | | | | | | | | |

  **Objective Assessment (Education, Screen 3)**

In the **Basic Skills/Education Factors** section:

• Identify dropout status, areas of basic skills deficiency, and other factors, if applicable.

• Type comments to summarize their education history.

• Click **Next** to save your edits and continue to the next page.
OAS Screen 4 – Degree

Staff members perform the following to complete screen 4 of the Objective Assessment Summary:

On the Degrees screen:

- Review any listed degree, if displayed, in the table of the Degrees screen.
  
  **Note:** The system will display degree information in the table, if the Background Wizard and/or Résumé Builder already includes this information.

- To add another degree, click the Add a New Degree link.
- Complete details of the individual’s educational background in the Add a Degree screen.
- Click Save to keep your edits (or Cancel to escape without saving).
- To record additional education details, click Add a New Degree and repeat the process.
- When done, click Next to save your edits and continue to the next page.
OAS Screen 5 – Certificate
Staff members perform the following to complete screen 5 of the Objective Assessment Summary:

- Review any listed certificates, if displayed, in the table of the Degrees screen.
  
  **Note:** The system will display this information if the Background Wizard and/or Résumé Builder already includes this information.

- To add another certificate, click the **Add a New Certificate** link.

**Objective Assessment (Certificates, Screen 5)**

- Complete details of the individual’s occupational licenses and/or certificates, if applicable.
- Click **Save** to keep your edits, or **Cancel** to escape without saving.
- To record additional certificate details, click **Add a New Certificate** and repeat the process.
- Click **Next** to save your edits and continue to the next page.
OAS Screen 6 – Employment

Staff members perform the following to complete screen 6 of the Objective Assessment Summary.

In the **Occupational Transferable Skills** area:
- Enter information that summarizes the skill assessment for the individual in the text box provided.
  - **Note:** You can click the **Spell Check** link to scan your text for spelling errors.

In the **Employment History** area:
- Review any listed employers, if displayed.
  - **Note:** The system will display this information if the Background Wizard and/or Résumé Builder already includes this information. Click the **Edit** link if an existing employer record need to be changed.
- To record additional work details, click **Add a New Employment History** and make entries in the Add Employment screen.
- Click **Save** to keep your edits (or **Cancel** to escape without saving).
- Click **Next** to save your edits and continue to the next page.
OAS Screen 7 – Household & Income

In the **Household & Income Summary** section:

- Enter a brief summary statement (as applicable).
- Click the **Add a New Household Member** link below the table, to add a new household member, (as applicable).

In the displayed **Add Income** screen:

- Complete details for the added individual and the contribution to household income.
- Click **Next** to save your edits and continue to the next page.

⚠️ *This screen is a “secure information” screen. The information on it is not included in the Print form. Staff will need a separate Admin privilege, which will determine if they can edit or only view this screen, or not access this screen at all.*
OAS Screen 8 – Work Readiness
Staff members perform the following to complete screen 7 of the Objective Assessment Summary.

In the **Work Readiness** section:
- Complete details of the individual’s dependent care needs.
- Type comments to summarize their dependent care needs.
- Complete details of the individual’s transportation, contact, work attire, and food information.
- Type comments to summarize their work readiness needs.

In the **Workplace Behavior** section:
- Complete details of the individual’s motivational factors, career goals, interviewing skills, résumé, completed work application, and other behavioral information.
- Type comments to summarize their workplace behavior assessment.
- Click **Next** to save your edits and continue to the next page.
OAS Screen 9 – Barriers

Staff members perform the following to complete this screen of the Objective Assessment Summary:

In the **Health & Behavioral Observations** section:
- Select statements that correctly characterize the individual’s health, behavior, and substance abuse information.
- Type comments to summarize these needs.
In the **Living Environment** section:
- Select statements that correctly characterize the individual’s housing/home life information.
- Type comments to summarize these needs.

In the **Economic Factors/Financial** section:
- Select statements that correctly characterize the individual’s financial information.
- Type comments to summarize these needs.

In the **Vocational/Occupational Factors** section:
- Select statements that correctly characterize the individual’s vocational/occupational factors information.
- Type comments to summarize these needs.

In the **Other Assistance Received** section:
- Select statements that correctly characterize the individual’s other assistance information.
- Type comments to summarize these needs.

In the **Barriers to Employment** section:
- Select statements that correctly characterize the individual’s employment obstacles.

In the **Access Assessment** section:
- Select statements that correctly characterize the individual’s access, independence and assistance needs.
- Type comments to summarize these needs.
- Click **Next** to save your edits and continue to the next page.
OAS Screen 10 – Criminal Background

Staff members perform the following to complete screen 10 of the Objective Assessment Summary.

### Criminal Background

Responses to the following items must be completely voluntary and confidential. This information is only used to determine need for additional services or resources in support of training and employment goals.

Information collected on this screen will NOT be included in print form.

#### Arrests

<table>
<thead>
<tr>
<th>Current status of arrest</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
<tr>
<td>Formerly incarcerated (not on parole)</td>
</tr>
<tr>
<td>On probaton</td>
</tr>
<tr>
<td>On parole/adult/aftercare (juvenile)</td>
</tr>
<tr>
<td>Under supervision</td>
</tr>
<tr>
<td>In work release program</td>
</tr>
<tr>
<td>Living in halfway house/shelter care</td>
</tr>
<tr>
<td>Evening reporting center</td>
</tr>
<tr>
<td>Under house arrest/control</td>
</tr>
<tr>
<td>Under electronic monitoring</td>
</tr>
<tr>
<td>Incarcerated</td>
</tr>
<tr>
<td>Other (specify)</td>
</tr>
<tr>
<td>Chose not to answer</td>
</tr>
</tbody>
</table>

#### Convictions

<table>
<thead>
<tr>
<th>Conviction type(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Misdemeanor</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Don't know</td>
</tr>
<tr>
<td>Felony</td>
</tr>
<tr>
<td>Both Misdemeanor &amp; Felony</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Have any convictions been:</th>
</tr>
</thead>
<tbody>
<tr>
<td>None Selected</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Most Recent Conviction:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill Today</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of Discharge of Sentence:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill Today</td>
</tr>
</tbody>
</table>

This screen does not print, and it has added privileges for staff.

<table>
<thead>
<tr>
<th>Criminal Background Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spell Check</td>
</tr>
</tbody>
</table>

---

**Criminal Background** section:

This section is merely an informational area for staff.

In the **Arrest** section:

- If conviction occurred, correctly select the appropriate arrest status for the individual.

In the **Convictions** section:

- If conviction occurred, select statements that correctly characterize any arrest information for the individual.
- Identify other conviction data, and dates.
- Type comments to summarize the criminal background.
- Click **Next** to save your edits and continue to the next page.

**Note:** This screen is a “secure information” screen. It is not included in the Print form. Staff needs a separate Admin privilege, which will determine if they can edit or only view this screen.
OAS Screen 11 – Tests
Staff members enter information on the Test screen for three types of assessment test: Basic Skills, WorkKeys, and Other Testing.

Objective Assessment (Tests, Screen 11, with a WorkKeys Assessment shown)

- Click the desired Click Here link to add, view, or edit any Basic Skills Assessment, Other Testing, or WorkKeys (if WorkKeys are part of your system).
  
  If the type of assessment does not exist you will first see and Add button.

  If the assessment does exist (of after you click Add), a separate window will display for adding or editing existing basic skill assessment results, other test results, or WorkKeys results, just as they are maintained in the Assessments Tab of the individual’s Case Management Profile.

- Add/edit the assessment information, and click the Save button.

  The separate windows will close.

- Type comments to summarize all test results.

- Click Next to save your edits and continue to the next page.
OAS Screen 12 – Referrals

Under certain circumstances, a referral may be made as the last step and screen related to the Objective Assessment Summary. If so, there are only two steps for referral.

To add a referral:

- Click the Add a New Referral link.
- From the displayed Add Referral area:
  - Select an Agency.
  - Select a Result for the Referral (Eligible, Ineligible, or Referred).
- Click **Save**. The Referral record displays in the list.

This is the last screen accessible for an OAS. Normally, you will click **Finish** next, and consider creating a more detailed IEP (identifying goals for the individual).
IEP
The Individual Employment Plan (IEP) record is used to list an individual’s goals, objectives, and services provided in relation to employment programs such as Wagner-Peyser and WIOA.
When staff click the **Create Individual Employment Plan** button from the Plan tab of the Case Management Profile, the system displays the following screen:

**Note:** An individual may have only one plan open at any given time. The **Create IEP/ISS** button does not display again once an IEP is created for the individual.

![New Plan Record Screen (Step 1)](image)

From this screen, staff can enter or select information as follows:

- Enter information in the required fields marked with a red asterisk (*).
- Enter the Plan Start Date.
- Select the **LWIA/Region** from the drop-down menu.
- Select the **Plan Started in Office Location** from the drop-down menu.
- Review other fields for information.
- Click the **Next** button to save and continue with this IEP record.

From the next tab, Goals, staff can create goals for the individual (as shown in the following figure).

**Note:** If you click **Exit Wizard** you will be asked whether or not you want to save the information before exiting.
If services or activities have been provided, they will display in the Services tab, which cannot be modified. The information is view only.

**Goals**

Click the Add New Goal link (as shown above) to enter the individual’s desired goal for this individual employment plan. Goals must be added before objectives. The New Goal screen is similar to the following example:

**IEP Plan Goals Screen (Step 2)**

**IEP Add New Goal Screen**
From this screen, enter or select information as follows. Complete required fields marked with a red asterisk *. Select options from the drop-down lists or checkboxes:

- Select a Region and Office.
- Select a Program Affiliation.
- Select a Type of Goal.
- Enter the Term of Goal.
- Enter a Description of the Goal.
- Enter the Date Established using the MM/DD/YYYY format.
- Enter the Estimated Completion Date using the MM/DD/YYYY format.

This date must be equal to or greater than the Date Established field entry. For example, if the date established is 2/11/2005, the estimated completion date must be 2/11/2005 or a later date such as 03/30/2005.

- Make sure the Completion Status is Open (because you are creating the goal).

Note: If you were closing the goal you would select Closed and then indicate the Reason Closed (Successful or Unsuccessful).

- Enter any additional information in the textbox provided.
- Click the Save button.

After you save the goal, the Goals screen will refresh with the added goal with a link to Edit or Delete (as shown below).

Objectives
Click the Objectives tab.
You can add a pre-defined objective or create a new one.
To create a new objective, click the Add new objective link to enter a related objective for the individual. The Add Objective screen is similar to the following:

Add New Objective Screen

From this screen, enter or select information as follows. Complete required fields marked with a red asterisk (*):

- Select the associated goal.
- Select the Region, Office Location, and Program Affiliation.
- Type the specific Objective.
- Type the Date Established using the MM/DD/YYYY format. You may also click the calendar icon to select the date.
- Type the Review Date using the MM/DD/YYYY format. You may also click the calendar icon to select the date. This date must be equal to or greater than the Date Established field entry, as described earlier for goals.
- Click Save when you are finished. Click Cancel to exit without saving.

Predefined Objectives

When a goal is saved in the system, the user may add predefined objectives to the record. The predefined objectives for your system are valued in a look up table (which may be modifiable through using the Virtual OneStop Administration system, depending on system settings and permissions for your configuration).

Click the Select predefined objectives link as shown on the previous page. A screen displays similar to the figure below.
Plan Predefined Objectives Screen

From this screen, enter or select information as follows. Complete required fields marked with a red asterisk (*).

- Click the check box for each objective you want to add to this individual’s program goal. You can select more than one check box, if applicable.
- Type the Date Established using the MM/DD/YYYY format.
- Type the Review Date using the MM/DD/YYYY format. This date must be equal to or greater than the Date Established field entry, as described earlier for goals.
- Click Save when you are finished. Click Cancel to exit without saving.

Updated Objective Information Screen
Working with Existing Plans

If an individual IEP record exists in the system, the screen that displays is similar to the following:

![Plan Screen with Existing IEP Plan](image)

- Click the **Edit** link to review or modify the existing record. Click **Delete** to delete the IEP. Click **Print** to print the IEP.

To close an IEP, you can perform the following tasks:

- Enter a date to close the plan in the **Plan closed on** field. Click the calendar icon to select the date or enter a date using the MM/DD/YYYY format. If the date entered does not meet the business rules set in your system, you will see a message window advising you to correct the date.

  > **Before closing a plan, you must close all goals and objectives associated with the plan. If you do not close the goals and objectives first, you will receive a warning message advising you to close all goals and objectives before closing the plan.**

- Click the **Save** button to save entered information. OR...

  Click **Cancel** to exit the screen and return to the Plan tab screen.

In closing an IEP, you must also remember to:

- Review or modify an existing goal by accessing the Goal tab. Enter the modifications and/or objectives on the screen that displays and click **Save** to save any changes. Add a new goal by clicking the **Add new goal** link. Complete information for goals as previously described in the “Goals” section.

- Review or modify an existing objective in much the same way from the Objectives tab.

- Review services provided to the individual from various programs such as Wagner-Peyser and WIOA. Various program services are entered in the **Case Management Profile › Activities › Service Plan**, the **Case Management Profile › Programs › Create Registration / Activity Records**, and the **Manage Individuals › Manage Individual Services** functions.

- Click **Save** to save all changes.
Assessments Tab (Case Management)

Click the Assessments tab to open the folder used for accessing staff assessments entering or editing the staff-controlled assessments (as shown in the figure below). The following figure displays a sample of the Assessments tab. Click a desired link to view completed assessments, and to enter/complete an assessment form.

![Assessments Tab, Selecting Basic Skills Assessment](image)

**Assessments Tab, Selecting Basic Skills Assessment**

**Note:** Unlike the separate Assessments folder (for an individual’s self-assessments) these assessments are entered only by staff members.

Basic Skills Assessment Entry

To work with a basic skill assessment entry, click the Basic Skills Assessment link to open the folder. Then click Add Assessment to create a new assessment entry, or click the Edit link to complete an existing entry. The assessment entry form appears, similar to the following figure.
The Basic Skills Assessment forms are used to enter test scores. To enter test scores in this form, follow these steps:

- Complete all text boxes or questions marked with a red asterisk (*). You must complete the required information to save changes.
- Use the Tab key to move between text boxes and questions. You may also click the left mouse button to move to another text box or question.
- Select from the drop-down list menus by clicking your selection.
- Click **Save Changes** to save your entries. Click **Cancel Changes** if you do not want to save your entries.

A list of completed assessment forms appears on the Assessments tab. You may change, view or delete test scores by selecting from the list. Click the **Edit** or **Delete** link in the **Action** column to modify or delete a form. The following figure displays the form that displays assessments:
Aptitudes

This component allows you to apply an aptitude assessment to the individual that you are working with. When you click the Aptitudes link, the following screen appears. If no aptitude assessments have been entered for the individual, click the Add Aptitude Assessment button.

**Note:** Enter the assessment score of the individual. Use the blue text as reference to what to enter into the fields.

After you enter the information about the aptitude test, click the Save button to accept changes.
WorkKeys Assessments
To enter an assessment using the WorkKeys® method, click the WorkKeys link.

Note: Depending on your specific system, this link may or may not be available.

The WorkKeys assessment screen appears, similar to the following figure:

![WorkKeys Assessment Screen](image)

You can click each number for details pertaining to the skill level.

You can click the link for details on assessing this category’s skill levels.

Note: Staff can edit WorkKeys assessments from this screen as well as from the Self Assessments tab. However, only this access will let staff select a Readiness certificate, or view occupations for changed scores without saving those scores.

In the WorkKeys Assessment column, click the category’s link for detailed help explanations of assessments using this method. In the Skill Level column, click the numbered link (above the button) to review details pertaining to the skill level. Use the following guidelines for the assessment entry:

- Select the skill levels by clicking the appropriate radio button for each level.
- Click Save once you have completed all assessments.
- Click the View Occupations link to review how this individual’s skill levels relate to different occupations.
- Click the appropriate Reset link to clear your choices. Click new skill levels to increase the skill levels and explore more career occupations. The Reset function clears the skill levels temporarily. It does not erase the previous skill level scores entered by staff. It simply gives options to see available careers for improved skill levels in specific assessment areas.
Other Assessments

To enter another type of assessment that doesn't fit any of the standard assessments, click the Other Assessments link. The Other Assessment screen appears, similar to the following figure.

The Other Assessment screen has a large list of possible test selections, but the rest of this screen consists of three generic fields (Assessment Date, Test Result, and Comments).

Staff Profiles – Report Profile

The Report Profile folder is useful for staff to evaluate where an individual went in the system, or as an access point to link to other significant items that the individual created. The Report Profile folder under the Staff's Profile contains four tabs:

- **Tracking** – Enables staff to review when the individual accessed specific system components.
- **Statistics** – Enables staff to monitor an individual's site usage. It contains several links to specific items that an individual may have created, such as résumés or the Virtual Recruiter.
- **Combined Assessment** – Enables staff to view and print all assessments, both self-assessment and case management-related, on one screen.
- **Labor Exchange** – Maintains a list of dates and times employers viewed the individual’s résumés. Staff can click to access employer and résumé details.
**Tracking Tab**

To view totals of the individual’s site usage by service:

- Click the **Site Usage** link to review a report on individual site usage.

  The following figure displays the summarized report of the person’s use of the system.

  ![Summarized and Detailed Tracking Reports](image)

**Examples of Summarized and Detailed Tracking Reports**

- To see services used during a specific time period, click **Select Date Range**. You will see a Date Range Selection window. Enter the dates you want to use to set your time period.
- Enter the beginning date in the Low Date text box and the ending date in the High Date text box. Click **Set Range** when you have finished. The report will be shown with results for this time span.

To see a detailed list of the services used by this person, select **Detailed Report**.

**Combined Assessments Tab**

There are two types of assessments: Self Assessments and Staff Assessments. This tab under the Report Profile lets staff review the results of both assessments in one quick view.
The tab is not designed to let staff enter or edit assessments. It is merely an easy way to see the combined view of the various assessments the individual performed themselves, and the staff assessment that was performed on behalf of the individual.

**Labor Exchange Tab**

This tab allows staff to view the résumés the individual has created in the system based on employers that have viewed them, and the jobs that the individual has applied for, filtered by their stage in the application process.

The screen opens with the default of *Information on Résumés* selected.

To view the job order details, click its name in the *Job Title* column.
The selected Stage will limit the display of jobs to those that include that stage, and display the previous stages for that job.