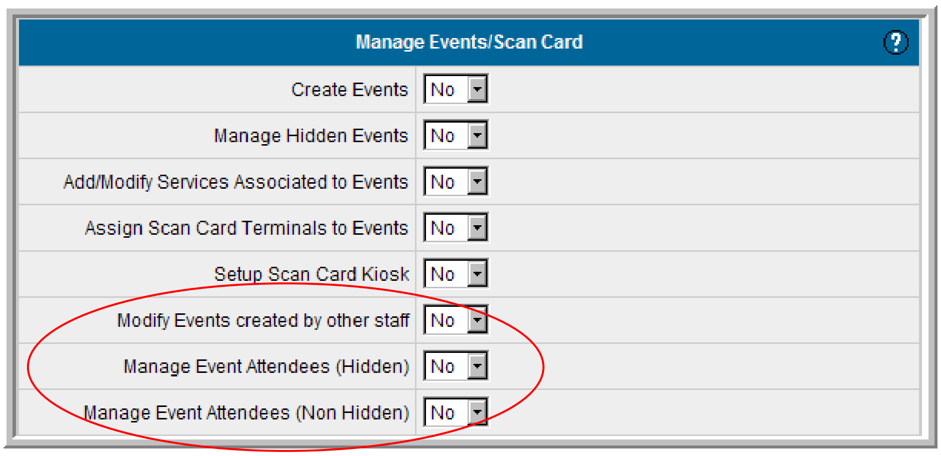
*RELEASE NOTES*

*EFM DEPLOYMENT DECEMBER 30, 2009*

**PREP and REA Deployment**

- **Three additional privileges for staff creating/managing PREP and REA events to 'fine tune' staff roles – THESE ALL DEFAULT TO NO AND MAY IMPACT STAFF ABILITY TO WORK WITH PREP/REA EVENTS**



| Manage Events/Scan Card | |
|---|---|
| Create Events | No |
| Manage Hidden Events | No |
| Add/Modify Services Associated to Events | No |
| Assign Scan Card Terminals to Events | No |
| Setup Scan Card Kiosk | No |
| Modify Events created by other staff | No |
| Manage Event Attendees (Hidden) | No |
| Manage Event Attendees (Non Hidden) | No |

  - Modify Events created by other staff – if no, staff edit privileges are restricted to ONLY their own events
  - Manage Event Attendees (Hidden) – if no, staff will NOT be able to update the action for attendees on HIDDEN events (e.g. cannot change from 'scheduled' to 'attendee' or 'no show', etc.)
  - Manage Event Attendees (Non Hidden) – if no, staff will NOT be able to update the action for attendees on events that are NOT hidden (e.g. cannot change from 'scheduled' to 'attendee' or 'no show', etc.)

- In addition to the event set up, manage attendees, manage event rosters and manage PREP system letters (with bulk printing from the manage event roster screen) deployed September 29, we will deploy the following changes defined since September:
  - PREP/REA User Guide and AWI policy documents have been added to the Staff Online Resources Page under a new PREP/REA section
  - The PREP import process will now run in two steps:

1. Step 1 -- Saturday night the file from the UI system will be imported to create the PREP Pool, determine whether the individual is automatically exempted, and create a new WP application if they haven't an open WP application. Please keep in mind that if, for any reason, the SSN is NOT already in EFM the individual will 'error out' of this process as there is not enough information in the file to create new registrations.

2. Monday staff will specify the # or % to be scheduled for REA (see below) and Monday night, Step 2 will run to schedule individuals into REA first, then into PREP. This means letters can be printed and mailed as early as Tuesday of each week for events two weeks in the future.

- On Manage Activities > Manage Events screen, in upper right corners the "Manage Pool Counts" link to establish the number of percent of the PREP Pool to be scheduled into REA events. This must be completed each Monday; if the number/percent is NOT changed the prior week value will be used. If a # or % is NOT entered, there will be NO ONE scheduled for REA events.

- On Manage Activities > Manage Events > Manage Attendees screen

    1. Hot linked usernames were added to allow staff to navigate directly to the individual case folders. NOTE: there is no functionality to automatically 'return' to the attendees' list once you are in an individual's case folder since this is in a different module of the system.

    2. Added a new drop down menu of reasons that displays when "No Show" is selected – a reason is required when "No Show" is selected and when "Other" reason is selected a comment field is also required. This will be used by UI Adjudicators and there will be a system notification sent so individual emails will not be required.

    3. When REA is scheduled, a 102 and 107 service is automatically scheduled (and visible via a services link on this screen).

    4. When PREP is scheduled, a 101 and 102 service is automatically scheduled (and visible via a services link on this screen).

- On Manage Activities > Manage Event Rosters screen

    1. Added a new Assist link in the Action column that will take the staff directly to the individual's case folder. NOTE: there is no functionality to 'return' to

the roster once you are in an individual's case folder since this is in a different module of the system.

2. In addition to the system PREP Orientation letters already in the system for each region, system REA Interview letters for each region will be added. These, too, may be edited by staff with the appropriate privileges and may be printed in bulk from the Manage Activities > Manage Event Rosters screen.

- The scheduling process is no longer limited to two events per week but has been changed to use a date range of 14-21 days AFTER the scheduling occurs (this will always be Tuesday through Monday since the scheduling process will run on Monday night).

- The scheduling process has been modified so that events will NOT be scheduled on any day designated by the State of Florida as holidays or other "non-work" days (e.g. in the event of a hurricane).

- A new nightly process was developed that will automatically record attendance and status SEVEN nights after the event. Staff may modify attendance status (e.g. from Registered to No Show to Attended if they come into the office within seven days of the event) for one week (e.g. the event for Tuesday January 19 can be modified through close of business on Tuesday January 26). The process will then record attendance and then the attendee list is 'locked down.' Any subsequent modifications will have to be made through AWI, who will request a data change.

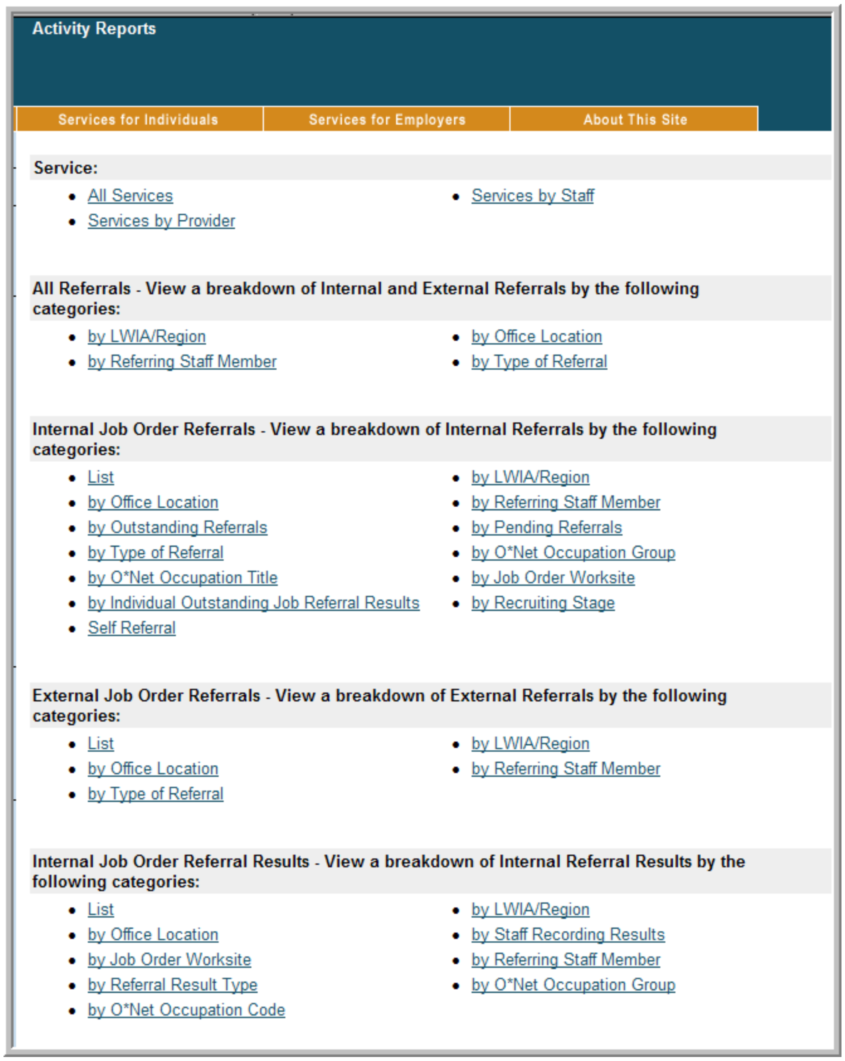
- NOTE: There are a number of new 'lists' and 'reports' in progress to assist staff manage REA and PREP. Initially, these will be provided by AWI, shortly they will be added to the EFM Custom Reports section.

**<u>Other Incidents and Changes to be deployed 12/30/2009</u>**

Change Orders:

- Activity Reports – Referrals and Referral Results has undergone a complete rewrite.
    - Added occupation, job order employer name, minimum and maximum wage, placement wage, staff assisted referral to referral results report
    - Added minimum wage to referral reports
    - New filters for region and office

- Added new report



**Activity Reports**

Services for Individuals | Services for Employers | About This Site

**Service:**

- All Services
- Services by Provider
- Services by Staff

**All Referrals - View a breakdown of Internal and External Referrals by the following categories:**

- by LWIA/Region
- by Referring Staff Member
- by Office Location
- by Type of Referral

**Internal Job Order Referrals - View a breakdown of Internal Referrals by the following categories:**

- List
- by Office Location
- by Outstanding Referrals
- by Type of Referral
- by O*Net Occupation Title
- by Individual Outstanding Job Referral Results
- Self Referral
- by LWIA/Region
- by Referring Staff Member
- by Pending Referrals
- by O*Net Occupation Group
- by Job Order Worksite
- by Recruiting Stage

**External Job Order Referrals - View a breakdown of External Referrals by the following categories:**

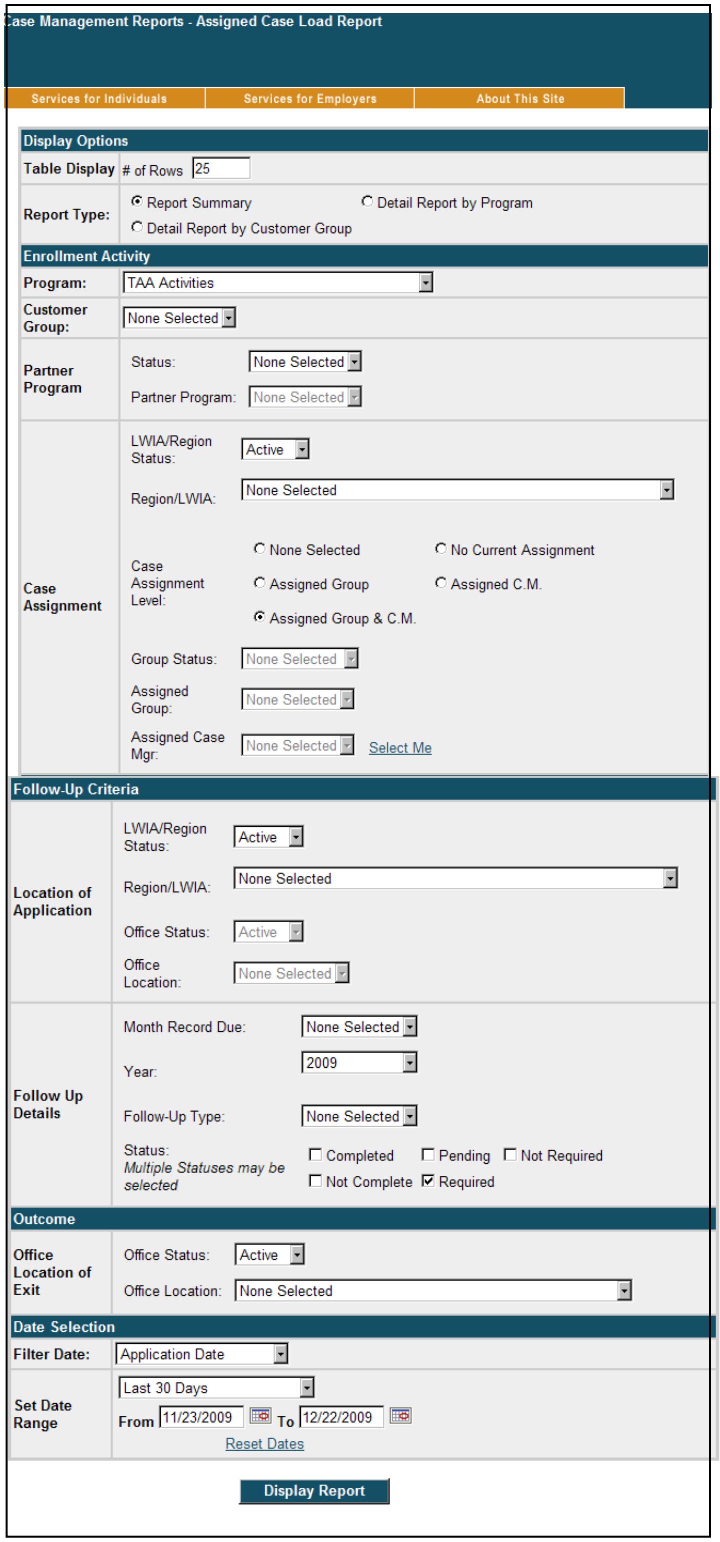
- List
- by Office Location
- by Type of Referral
- by LWIA/Region
- by Referring Staff Member

**Internal Job Order Referral Results - View a breakdown of Internal Referral Results by the following categories:**

- List
- by Office Location
- by Job Order Worksite
- by Referral Result Type
- by O*Net Occupation Code
- by LWIA/Region
- by Staff Recording Results
- by Referring Staff Member
- by O*Net Occupation Group

- Case Management Reports – NEW Assigned Case Load Report has additional filters:
  - Based upon program selected (except for WP) the Customer group can now ALSO be specified (e.g. WIA -- adult, DW, etc. and TAA Activities -- TAA, ATAA, RTAA)
  - Case assignment options by region, case assignment level, group status, assigned group, assigned case manager with a 'select me' link that provisionally display based upon program and customer group selected
  - Follow up Criteria by location of application and follow up details (allows selection of MULTIPLE statuses)
  - Outcome section with office location at exit

- Date filters include application date, eligibility date, intensive eligibility date, create date, last edit date, closure date
- See screen print on the next page



- In EFM, where the system displayed “Career Readiness Certificates” for Work Keys, the language will now read “Florida Ready to Work Credential” and the help text has been updated accordingly with links to the Ready to Work website.
- Employer Candidate View – References -- If an individual states on their resume "References Available Upon Request," then the tab will read "References Available Upon Request,” else, if an individual mentions nothing about references, the tab will read "Please Contact this Individual Regarding References"
- Manage Activities > Manage Events page display-- events in the Manage Events calendar display the event title and start time in chronological order (similar to Microsoft Outlook)
- Employer Candidate Search now includes employer option (in advanced search) to search only for candidates seeking part time employment, will consider this factor in ranking candidates and will continue the criteria when searching for similar candidates from job search results.
- On Individual Summary Tab > Chronological Case History > the list of services has a ‘clickable’ heading to reorder the list.
- Modified staff privileges for Edit/View SSN on the summary tab to allow view without edit.
- Candidate lists on Manage Labor Exchange, Mass Candidate Referrals now displays highest education level between Resumes and Occupational Experience on the detailed view.
- Language in Resume Builder changed from “cut and paste” to “copy and paste.”
- Link to obtain DD214 added to WIA and WP applications as well as TAA application.
- Manage Individuals, Assist an Individual now more clearly specifies when Resume Available is selected: Search ONLY for individuals with a resume; search ONLY for individuals with an online resume; search ONLY for individuals with no resume
- Added a new reason of “No contact made with employer” when Not Hired is selected.
- To minimize DV entries; a new edit check has been added for staff with the privilege of “Edit actual begin date” = yes to validate that the new date entered is < Actual End Date (if it exists). This will apply to enrollments in WIA, TAA and Generic programs.

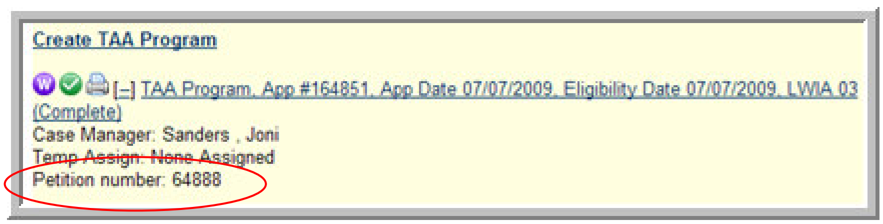
- In the Admin site – there was one privilege for case assignment that was located in "Manage Individuals" that has been relocated to "Individual Case Assignment" for consistency. NO CHANGE IN FUNCTIONALITY, just the location for ease of administration

- On the employment in case closure, to clarify for staff, the answer to "is this training related employment?" is display only – there is no text box so staff cannot attempt to enter a different answer (this is NOT a functionality change; just a display change requested by other customers).

- The link between Alison free on-line training and EFM has been improves to allow users to register directly.

- The width of the case notes field has been expanded for entry and display so that less scrolling is required to read longer notes.

- TAA petition number will display on programs tab as follows:




**Incidents:**

*Florida*

- 103710 – Reg 1 – WIA follow up report in CM not accurate – reports now exclude any hard exited case as follow up is not required

- 106916 – Reg 24 – job order application and hire information incorrect in EFM – resolved issue where job order statistics did not display all referrals made

- 107308 – spelling error in resume builder corrected

- 109741 – reg 24 – print application displayed incorrect username

- 112809 – Employer Case Assignment link missing – restored.

- 113281 – Reg 13 – Assist an Individual address – county not displaying

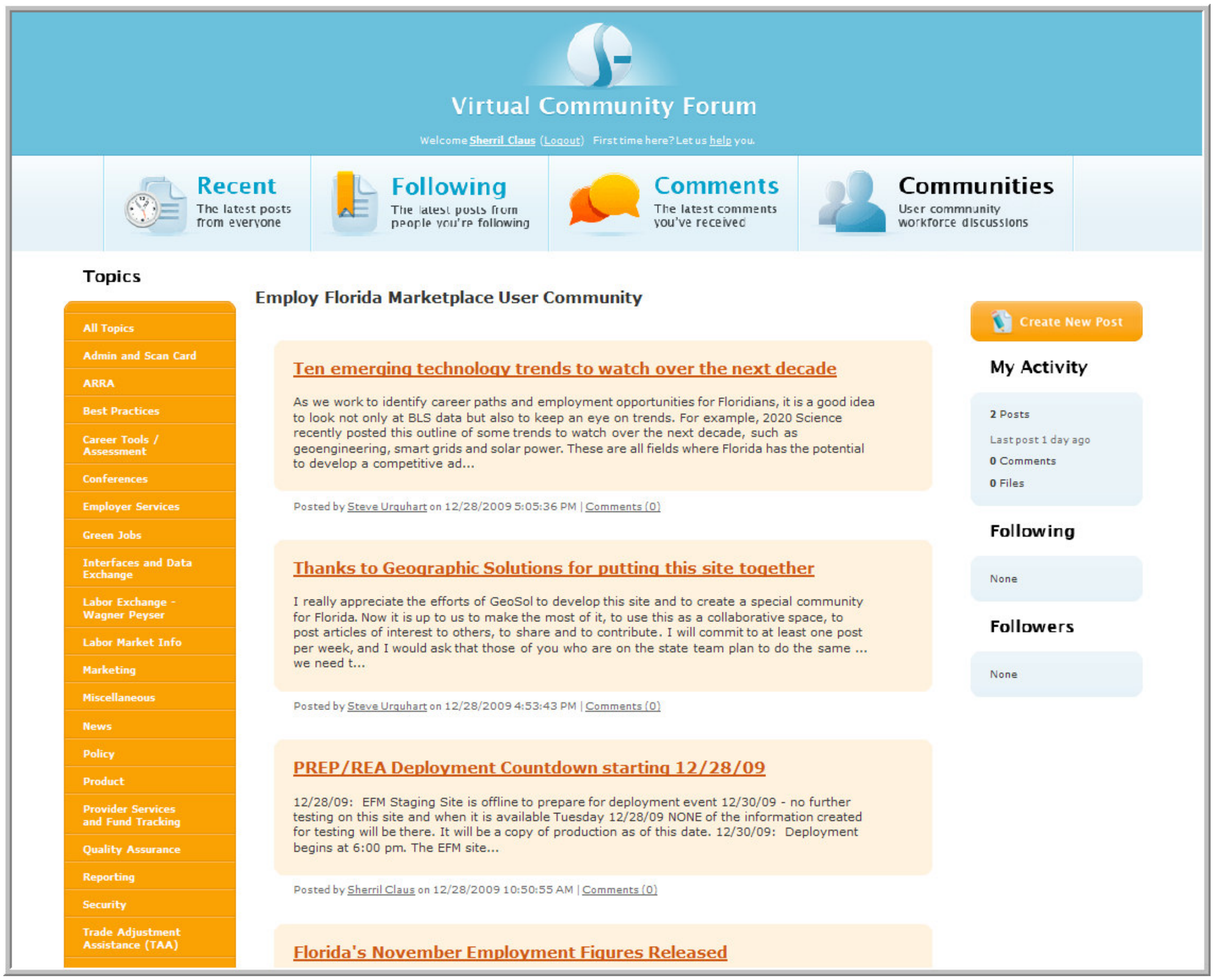
- 113918 – Reg 11 – Job Order alerts for employer created job orders sent to incorrect office – we have updated to send the alert to the ASSIGNED office. If there is NO assigned office (older employers created before v 10 or not updated in v 10) send to the office associated to the zip code on the worksite on the job order. If there is no office associated to the zip code send to the default office.
- 114432 – Reg 18 – Case Closure button NOT restricted by privilege has been fixed
- 114634 – Reg 2 – Suppressed jobs displaying website/location incorrectly
- 115013 – AWI – Corrected privilege for content publisher to correctly suppress access to the manage micro-portals when privilege is set = no
- 116972 – AWI – Fixed issue displaying multiple occupation certificates
- 118493 – Reg 17 (duplicate) Customer resumes will not download has been fixed

*Non-Florida*

- Corrected page display of position when staff edits activities.
- Corrected WIA app to display red asterisks on required fields on the individual income screen.
- Viewing case notes in applicant screen: Added a checkbox below the applicant case note: 'Check the box to allow this note to be visible to employers. If an employer is logged in, employer will see all notes he/she created and only notes created by staff that specified employers could view. If Staff is logged in, they will see ALL notes regardless of who created them.
- Added alert for staff (with privilege to edit enrollment after exit) when they try to edit a last actual date of an enrollment "Cannot remove the last activity date when an outcome exists."
- WIA application and closure print have been corrected to display the Grant information.

**Other:**

Geographic Solutions has created a new community site for Employ Florida Marketplace users. From the left Navigation area, Other Staff Services, click on "Geographic Solutions Community Site" or from left Navigation area, My Staff Account, click link at the bottom of the page. You will be automatically signed in to the Community Site (using your staff log in and password).




This is a networking site where Geographic Solutions can post updates about system information, release notes for deployment events and other changes that are 'hot fixed' to production, lunch and learn webinar training opportunities, and where staff can view information about workforce in Florida posted by GeoSol or state users. Users can create new posts and comment on existing posts – the site will be reviewed daily. Users can also 'follow' individuals. For instance, if you want email notifications of new posts/system updates from the project manager, follow Sherril Claus. To do so, simply click her name on a document she posted, and then click the Follow Me link. From that page, you can also click View Sherril's Posts to see all of her posts. Staff can also click the Recent Tab to see posts for all Geographic Solutions customers.


Virtual Community Forum
Welcome Sherril Claus (Logout) First time here? Let us help you.
Recent
The latest posts from everyone
Following
The latest posts from people you're following
Comments
The latest comments you've received
Communities
User commnunity workforce discussions
Topics
All Topics
Admin and Scan Card
ARRA
Best Practices
Career Tools / Assessment
Conferences
Employer Services
Green Jobs
Interfaces and Data Exchange
Labor Exchange - Wagner Peyser
Labor Market Info
Marketing
Miscellaneous
Sherril Claus (sclaus)
Geographic Solutions
View Sherril's Posts
Eastern Time
Last logged in on 12/28/2009 5:30:53 PM
3 comments
6 posts
11 files uploaded
Follow Sherril
Sherril Claus is following:
Geographic Solutions
Pam Johnson
Kim Thomas
Create New Post
My Activity
2 Posts
Last post 1 day ago
0 Comments
0 Files
Following
None
Followers
None