



## **One Stop Service Tracking**

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### **Module 3: Initial Assessment and Support Service Plan**

#### **Introduction to Module 3: Initial Assessment and Support Service Plan**

Now that we've practiced entering in a customer's background information, let's continue by going through the pages that will help us perform an initial assessment.

**Module 3: Initial Assessment**

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

✓ **Navigate to and complete the following screens:**

- **Steps to Self Sufficiency**
- **Goals and Interests**
- **Needs and Barriers**
- **Education Detail**
- **Assessment Detail**
- **Assessment Outcome**
- **Service Detail**
- **Service Outcome**

By initial assessment, we are referring to the pages that allow us to capture a customer's:

- Steps to Self Sufficiency
- Education Detail
- Goals and Interests
- Needs and Barriers

Additionally, we will go through pages that will be used to capture details for a customer's:

- Assessment tests
- Assessment test outcome
- Services
- Service outcomes

Let's start by taking a look at the Steps to Self Sufficiency.

The screenshot displays the 'Service Tracking' application interface. At the top, there is a header with user information: '777-77-1026 | Miles Cruz', 'Case Manager: Lisa Campbell', 'Status: Open/MN/Open-UP', 'PAS: P55623', 'RFA: 55512536279/1', and 'R/CAU: 2/2/2003'. Navigation icons for Home, Back, Desk, Help, and Note are visible in the top right. A purple banner below the header contains a help message: 'Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.'

The main content area is divided into two sections:

- History of Steps to Self-Sufficiency:** A table with columns for Summary, Responsibility, and Status.
 

Summary	Responsibility	Status
Provide child care vouchers fo...	Career Manager	<a href="#">Open</a>
Provide catalog of local colle...	Career Manager	<a href="#">Open</a>
Purchase alarm clock to preven...	Customer	<a href="#">Closed</a>
- Steps to Self-Sufficiency Detail:** A form for editing a specific step.
  - Describe the step needed to reach self-sufficiency:** A text area containing 'Purchase alarm clock to prevent being late for scheduled appointments.'
  - Scheduled Completion Date:** A date picker set to 12/01/2000.
  - Responsibility:** A dropdown menu set to 'Customer'.
  - Status:** A dropdown menu set to 'Closed'.
  - Completion Date:** A date picker set to 12/06/2000.

At the bottom of the detail form, there are buttons for 'Save', 'Clear Changes', and 'Cancel', each with a red question mark icon. A legend at the bottom of the page explains the icons: '\* Required Fields: Information that is required.' and 'Information Bubble: Click on the bubble for specific help.'

### Entering Steps to Self Sufficiency:

This page is used to capture the step by step actions that a customer and a career manager will be responsible for in order to help the customer become self-sufficient.

This page includes:

- An area for entering the details of a specific step
- A running history of all open and closed steps
- The ability to navigate to the detail for any of the listed steps

The data that is captured for each step includes:

- A description of the step
- The scheduled completion date
- Who is responsible to complete the step
- The status of the step
- The actual completion date (most likely to be entered at a later time)

Historically, these steps have been documented as part of creating the Individual Responsibility Plan. The Steps to Self Sufficiency is a function that can be used as a

tool from the very beginning of a customer's case. As you gather information about a customer (through conversations, assessments, etc.), this is the place to document the step by step actions that the customer and career manager are responsible for completing.

This module also includes pages that capture a customer's Goals and Interests and a customer's Needs and Barriers. Understanding a customer's goals, interests, needs and barriers will give us an idea of what services, activities or training (those steps to self sufficiency) are appropriate for that customer.

Using this page as a way to organize the steps you are going to take will provide you with a list of the services and/or activities that you have to track in the system. These steps are included on the customer's Individual Responsibility Plan.

**Associated Procedures: (Navigating from the Case Detail page)**

**CLICK** the 'Plan Development' tab on the Case Detail

**CLICK** 'Add' on the Steps to Self-sufficiency tab

**ENTER** a description of the step

**ENTER** the scheduled completion date

**SELECT** whose responsibility it is to complete the step (Career Manager, Customer or Both)

**SELECT** the status of the step

When this step to self-sufficiency has been closed, complete the following:

**ENTER** the actual completion date

**CLICK** 'Save' to update the information.

This step will now be listed as Closed in the History of Steps to Self-sufficiency.

**CLICK** 'Cancel' to return to the Case Detail screen.

**Service Tracking** 777-77-1026 | Miles Cruz PAS: P55623  
Case Manager: Lisa Campbell RFA: 65612536279/1  
Status: Open/MN/Open-UP R/C/U: 2/2/203 Hide

Home Back Desk Help Note

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[Return to Workload](#)

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**Education Detail For Customer Who Has Recieved Financial Aid**

List All Sources Of Financial Aid

Pell Grant  
Perkins Student Loan

\* Is The Customer Currently In School?  Yes  No

Highest School Grade Completed Associate Degree Awarded

**Completed Training/Certifications**

Description	Date Completed	Is Certification Current
<a href="#">CDL Class A Certification</a>	09/15/1992	Yes
<a href="#">Hazardous Material Certification</a>	07/20/1995	Yes
<a href="#">Cardiopulmonary Resuscitation (CPR)</a>	11/03/1998	Yes
<a href="#">Basic Child Care Training</a>	09/30/2000	Yes

**Training/Certification Detail**

Description Of Training/Certification Hazardous Material Certification

Completion Date 07/20/1995

How Was The Training Funded? Other

Is The Customer's Certification Current?  Yes  No

Save ? Clear Changes ? Cancel ?

## Entering Education Information:

This page is used to capture information about the customer's educational background, including:

- If the customer has ever received financial aid
- If the customer is currently in school
- The customer's highest grade completed
- Any completed certifications/training to date

If the customer has previously received financial aid, you will be prompted to list all sources of financial aid received.

## Associated Procedures (Navigating from the Case Detail)

### I. Adding Education Detail

**CLICK** the 'Plan Development' tab on the Case Detail

**CLICK** the 'Add' or 'Edit' button under the Education Detail section to begin

**CLICK** the radio button that indicates whether the customer has ever received financial aid (if you indicate that the customer has received financial aid, then you must enter all their financial aid sources)

**CLICK** the radio button that indicates whether the customer is currently in school

**SELECT** the customer's highest school grade completed from the drop down list

**CLICK** 'Save' to update

All completed training and certifications are listed in the Completed Training/Certifications table with the corresponding date of completion and certificate status.

## II. Adding Previous Training and Certifications

**CLICK** the 'Add' or 'Edit' button under the Education Detail section to begin

**ENTER** a description of the training or certification that was completed

**ENTER** the date that the training or certification was completed

**SELECT** the funding source for the training or certification from the drop down list

**CLICK** the radio button to indicate if the customer's certification is current

**CLICK** 'Save' to update the customer's history of training and certifications

Should the certification expire, simply complete the following steps

## III. Editing Existing Training and Certifications

**CLICK** the hyperlink for the appropriate description

**CLICK** the radio button to indicate if the customer's certification is no longer current

**CLICK** 'Save' to update the customer's history of training and certifications

**CLICK** 'Cancel' to return to the Case Detail screen.

Service Tracking

777-77-1026 | Miles Cruz  
 Case Manager: Lisa Campbell  
 Status: Open/MN/Open-UP

PAS: P55623  
 RFA: 55512536279/1  
 R/C/U: 2/2/203

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Note

Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.

Goals and Interests
?

Sort by: Date Identified Sort ?

Date Identified	Status	Description	Date Achieved
08/12/1992	Achieved	<a href="#">Pay off student loans</a>	10/06/2000
05/03/2000	Achieved	<a href="#">Mechanic</a>	11/30/2000
08/30/2000	In Progress	<a href="#">Trucking Company Manager</a>	Not Achieved
08/30/2000	No Longer Applicable	<a href="#">Lead Dispatcher</a>	Not Achieved
08/31/2000	In Progress	<a href="#">Truck Dispatcher</a>	Not Achieved

Select Goal Type:     Personal    Educational    Employment    Optimum Health

Employment Goal Entry
?

Goal Length     Short Term     Long Term

Type of Work     ?

\* Date Goal was Identified     ?

Date Started Working Toward Goal     ?

Expected Achievement Date     ?

Achievement Date     ?

Expected Wage \$

Expected Wage is Defined     Hourly     Annually

City

State

Benefits Wanted

Goal Status

Would you like this goal displayed on the Individual Responsibility Plan?     Yes     No

Save ?
Clear Changes ?
Cancel ?

[Go to Steps to Self-Sufficiency](#)

## Entering Goals and Interests:

This page is used to capture a customer's personal, educational, employment and optimum health goals.

This page includes:

- An area for entering the details of a specific goal
- A running history of all goals
- The ability to navigate to the detail for any of the listed goals

The data that is captured for each goal varies depending on the type of goal it is. As an example, the data captured for an employment goal includes:

- Goal length
- Goal description
- The date the goal was identified (will default to current date)
- The date the customer started working towards the goal
- The expected achievement date
- The actual achievement date (most likely to be entered at a later time)

- The goal status
- Whether or not the goal should be displayed on the Individual Responsibility Plan

### **Associated Procedures: (Navigating from the Case Detail)**

#### I. Entering Personal, Educational and Optimum Health Goal Detail

**CLICK** the 'Plan Development' tab on the Case Detail

**CLICK** 'Add' on the Goals and Interests tab to begin

**CLICK** the 'Select Goal Type' radio button that best describes the type of goal the customer wants to achieve

**CLICK** the radio button to indicate whether this is a short term or long term goal

**ENTER** a description of the goal

**ENTER** the date the goal was identified (the system defaults to the current date, but you can overwrite this if appropriate)

**ENTER** the date that the customer started working toward the goal

**ENTER** the expected achievement date

**SELECT** the appropriate goal status for the goal

**CLICK** 'Save' to add the goal to the customer's running list of goals (at the top of the page)

**CLICK** 'Cancel' to return to the Case Detail screen.

#### II. Entering Employment Goal Detail

**CLICK** 'Add' on the Goals and Interests tab to begin

**CLICK** the 'Employment' radio button

**CLICK** the radio button to indicate whether this is a short term or long term goal

**ENTER** a description of the employment goal (type of work)

**ENTER** the date the goal was identified (the system defaults to the current date, but you can overwrite this if appropriate)



**ENTER** the date that the customer started working toward the goal

**ENTER** the expected achievement date

**ENTER** the expected wage and indicate whether this is an hourly figure or an annual figure

**ENTER** the city where the customer would like to be employed

**SELECT** the state where the customer would like to be employed

**ENTER** a description of the benefits wanted (e.g., medical, dental, life insurance, child care)

**SELECT** the appropriate goal status for the goal

The radio button indicates that this goal should display on the Individual Responsibility Plan (defaulted to 'Yes')

**CLICK** 'Save' to add the goal to the customer's running list of goals (at the top of the page)

**CLICK** 'Cancel' to return to the Case Detail screen.

### III. Editing Goal Detail

**CLICK** 'Add' on the Goals and Interests tab to begin

**FROM THE GOALS AND INTERESTS LIST, CLICK** the goal that you would like to edit (CLICK on the associated blue hyperlink under the 'Description' column- the detail for that particular goal is viewable in the 'Entry' portion of the page)

**CLICK** 'Cancel' to return to the Case Detail screen.

### **Helpful Tips:**

**Tip 1:** A useful function on this page is the ability to link directly to the Steps to Self Sufficiency. As goals are identified, and while it is fresh in your mind, use this link to document the steps that the customer will have to take in order to minimize or eliminate any barriers which may exist which would cause these goals to not be achieved.

**Service Tracking** 777-77-1028 | Miles Cruz PAS: P55623  
Case Manager: Lisa Campbell RFA: 55512536279/1  
Status: Open/MN/Open-UP R/C/U: 2/2/203 Hide

Home Back Desk Help Note

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**Needs and Barriers**

Sort by:  **Sort** ?

Type	Status	Date Identified	Completion Date
<a href="#">Clothing</a>	Resolved	08/29/2000	09/04/2000
<a href="#">Criminal Record</a>	Identified	09/01/2000	Unresolved
<a href="#">Transportation</a>	Resolved	08/29/2000	08/31/2000

**Add/Edit a Need or Barrier** ?

Need/Barrier Detail:

Status:

\* Date Identified:

Expected Completion Date:

Completion Date:

Plan to resolve the need or barrier:

Would you like this barrier displayed on the Individual Responsibility Plan?  Yes  No

**Save** ? **Clear Changes** ? **Cancel** ?

[Go to Steps to Self-Sufficiency](#)

## Entering Needs and Barriers:

This page is used to capture a customer's needs and barriers to self-sufficiency.

This page includes:

- An area for entering the details of a specific need or barrier
- A running history of all identified needs and barriers
- The ability to navigate to the detail for any of the listed needs and barriers

The data that is captured for each need or barrier includes:

- A description of the need/barrier
- The status of the need/barrier
- The date that the need/barrier was identified (defaults to current date)
- The expected resolution date
- A description of the approach to resolving the need/barrier
- Whether or not the need/barrier should be displayed on the Individual Responsibility Plan

**Associated Procedures:**

I. Entering Need/Barrier Detail

**CLICK** 'Plan Development' tab on the Case Detail

**CLICK** 'Add' on the Needs and Barriers tab to begin

**SELECT** a description of the need/barrier from the drop down list

**SELECT** the status of the need/barrier

**ENTER** the date the need/barrier was identified (the system defaults to the current date, but you can overwrite this if appropriate)

**ENTER** the expected completion date

**ENTER** the completion date (when known)

**ENTER** a description of how you and the customer will work to resolve this need/barrier

The radio button indicates that this need/barrier should display on the Individual Responsibility Plan (defaulted to 'Yes')

**CLICK** 'Save' to add the barrier to the customer's running list of needs/barriers (at the top of the page)

**CLICK** 'Cancel' to return to the Case Detail screen

II. Editing Need/Barrier Detail

**CLICK** 'Add' on the Needs and Barriers tab to begin

**FROM THE NEEDS AND BARRIERS LIST, CLICK** the need/barrier that you would like to edit (CLICK on the associated blue hyperlink under the 'Type' column- the detail for that particular need/barrier is viewable in the 'Entry' portion of the page)

**Helpful Tips:**

**Tip 1:** A useful function on this page is the ability to link directly to the Steps to Self Sufficiency. As needs/barriers are identified, and while it is fresh in your mind, use that link to document the steps that the customer will have to take in order to minimize or eliminate his/her barrier.

Service Tracking

777-77-1026 | Miles Cruz  
 Case Manager: Lisa Campbell  
 Status: Open/MN/Open-UP

PAS: P56823  
 RFA: 55512536279/1  
 R/C/U: 2/2/203

Home Back Desk Help Note

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**Assessment Detail**

Will this test be administered by an external resource	<input checked="" type="radio"/> Yes <input type="radio"/> No <span style="float: right; color: #4a4a8a;">?</span>
* Type of Assessment Test	Skills Inventory
* Name of Assessment Test	SAGE TFA
* Schedule Date of Completion	11/12/2000
Status	Scheduled
* Administrator	Sylvan Learning Center
Contact Phone	(850) 555-2635
Address	122 Main ST
City	Anywhere
State	Florida
Zip	77777 - 1234

Save/Continue ?
Clear Changes ?
Cancel ?

\* **Required Fields:** Information that is required.

? **Information Bubble:** Click on the bubble for specific help.

### Scheduling a customer Assessment Test:

This page is used to track the details associated with scheduling an assessment test for a customer. This page “builds on itself” in order to lead the user through entering the required details. For example, the first question you are presented with is whether or not the assessment is being administered by an external resource. The fields that you see next will depend on how you answer this initial question.

The data captured on this page includes:

- Whether or not this test will be administered by an external resource
- The type of assessment
- The name of the assessment
- The scheduled date for completion
- The status

If the assessment is administered externally, the following information is also captured:

- The test administrator’s name
- The administrator’s phone number
- The administrator’s address, city, state and zip

Later in this module, we will discuss “Assessment Outcomes.” OSST includes specific templates designed to capture scores for specific assessment tests. Once a customer completes an assessment, the career manager has the ability to link to this score template to input the customer’s scores. The template that the career manager sees is based on the assessment “name” that was originally entered as part of the Assessment Detail.

**Associated To Dos:**

- A Career Manager To Do will be generated on the day of the scheduled assessment as a reminder that the customer should be taking the scheduled assessment

**Associated Procedures: (Navigating from the Case Detail)**

I. Entering Assessment Detail for an Internal Administrator

**CLICK** the ‘Plan Development’ tab on Case Detail

**CLICK** ‘Add’ on the Assessments tab to begin

**CLICK** ‘No’ to indicate that the test will not be administered by an external resource (external resource means a provider other than the One Stop location)

**SELECT** the Type of Assessment from the drop down box (e.g., Skills Inventory)

**SELECT** the Name of the Assessment from the drop down box (e.g., SAGE TFA)

**ENTER** the scheduled date of completion for the assessment test

**SELECT** the status of the Assessment from the drop down box

**CLICK** ‘Save/Continue’

II. Entering Assessment Detail for an External Administrator

**CLICK** ‘Add’ on the Assessments tab to begin

**CLICK** ‘Yes’ to indicate that the test will be administered by an external resource (external resource means a provider other than the One Stop location)

**SELECT** the Type of Assessment from the drop down box (e.g., Skills Inventory)

**SELECT** the Name of the Assessment from the drop down box (e.g., SAGE TFA)

**ENTER** the scheduled date of completion for the assessment test

**SELECT** the status of the Assessment

**ENTER** the administrator's information (name, phone number, address, city, state, zip)

**CLICK** 'Save/Continue'

**Service Tracking** 777-77-1026 | Miles Cruz PAS: P55623  
Case Manager: Lisa Campbell RFA: 55512536279/1  
Status: Open/MN/Open-UP R/C/U: 2/2/203

Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.

**Assessment Detail**

* Type of Assessment Test	Interest Inventory
* Name of Assessment Test	GATB
* Schedule Date of Completion	09/26/2000
Status	Completed
Completion Date	09/26/2000
Outcome/Results	Exhibits very good motor coordination and finger dexterity skills.

Save/Continue ? Clear Changes ?

\* Required Fields: Info [ ] Information Bubble: Click on the bubble for specific help.

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### Entering Assessment Outcomes:

This page is used to track the outcomes associated with a specific assessment test. There are four templates in the system. They were built for the most commonly used assessment tests in the state of Florida. These templates are as follows:

- GATB
- SAGE TFA
- SDS Form 'E'
- TABE

There is also an "Other" template that should be used if an assessment other than these four are administered.

The data captured on this page is based on the assessment given. Let's take a look at each of the templates.

Service Tracking

777-77-1026 | Miles Cruz  
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PAS: P55623  
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R/C/U: 2/2/203

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### General Aptitude Test Battery (GATB)

Aptitude	Level	Rating
* General Learning Ability	2	<input type="radio"/> Very High <input type="radio"/> High <input type="radio"/> Average <input checked="" type="radio"/> Low <input type="radio"/> Very Low
* Verbal Aptitude	2	<input type="radio"/> Very High <input type="radio"/> High <input type="radio"/> Average <input checked="" type="radio"/> Low <input type="radio"/> Very Low
* Numerical Aptitude	2	<input type="radio"/> Very High <input type="radio"/> High <input type="radio"/> Average <input checked="" type="radio"/> Low <input type="radio"/> Very Low
* Spatial Aptitude	2	<input type="radio"/> Very High <input type="radio"/> High <input type="radio"/> Average <input checked="" type="radio"/> Low <input type="radio"/> Very Low
* Form Perception	3	<input type="radio"/> Very High <input type="radio"/> High <input checked="" type="radio"/> Average <input type="radio"/> Low <input type="radio"/> Very Low
* Clerical Perception	3	<input type="radio"/> Very High <input type="radio"/> High <input checked="" type="radio"/> Average <input type="radio"/> Low <input type="radio"/> Very Low
* Motor Coordination	5	<input checked="" type="radio"/> Very High <input type="radio"/> High <input type="radio"/> Average <input type="radio"/> Low <input type="radio"/> Very Low
* Finger Dexterity	5	<input checked="" type="radio"/> Very High <input type="radio"/> High <input type="radio"/> Average <input type="radio"/> Low <input type="radio"/> Very Low
* Manual Dexterity	5	<input checked="" type="radio"/> Very High <input type="radio"/> High <input type="radio"/> Average <input type="radio"/> Low <input type="radio"/> Very Low

Save ? Clear Changes ?

Internet

## Entering the Assessment Outcome for the GATB

### Associated Procedures: (Navigating from the Case Detail)

**CLICK** the appropriate hyperlink under the Test Detail column

**SELECT** a status of 'Complete' from the status drop down list

**ENTER** any comments you may have regarding the customer's assessment in the Outcome/Results area (this is not the area to enter the scores though- that will come next)

**ENTER** the date that the assessment was completed

**CLICK** 'Save/Continue' (this takes you to the Outcomes template where the scores should be entered)



Service Tracking 777-77-1026 | Miles Cruz PAS: P56623  
Case Manager: Lisa Campbell RFA: 56512536279/1  
Status: Open/MN/Open-UP R/C/U: 2/2/203 Hide

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### SAGE Temperament Factor Assessment (TFA)

* Alone	5	* Directing	2	* Expressing	3
* Influencing	4	* Judgement	5	* People	6
* Repetitive	5	* Stress	4	* Tolerances	8
* Under	3	* Variety	1		

Counseling recommended

Please enter comment for scores over six.

Save Clear Changes

\* Required Fields: Information that is required. Information Bubble: Click on the bubble for specific help.

## Entering the Assessment Outcome for the SAGE TFA

### Associated Procedures: (Navigating from the Case Detail)

**CLICK** the appropriate hyperlink for under the Test Detail column

**SELECT** a status of 'Complete' from the status drop down list

**ENTER** any comments you may have regarding the customer's assessment in the Outcome/Results area (this is not the area to enter the scores though- that will come next)

**ENTER** the date that the assessment was completed

**CLICK** 'Save/Continue' (this takes you to the Outcomes template where the scores should be entered)

Service Tracking

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Self-Directed Search (SDS)

Activities	R	I	A	S	E	C
	6	3	4	2	9	4
Skills	R	I	A	S	E	C
	11	5	6	7	8	1
Jobs	R	I	A	S	E	C
	2	13	22	11	4	5
Abilities	R	I	A	S	E	C
	6	5	6	7	8	9
Total	R	I	A	S	E	C
	25	26	38	27	29	19

\* Score SEC

Add Save Clear Changes

\* Required Fields: Information that is required. Information Bubble: Click on the bubble for specific help.

Internet

## Entering the Assessment Outcome for the SDS Form 'E'

### Associated Procedures: (Navigating from the Case Detail)

**CLICK** the appropriate hyperlink under the Test Detail column

**SELECT** a status of 'Complete' from the status drop down list

**ENTER** any general comments you may have regarding the customer's assessment in the Outcome/Results area (this is not the area to enter the scores)

**ENTER** the date that the assessment was completed

**CLICK** 'Save/Continue' (this takes you to the Outcomes template where the scores should be entered)

Service Tracking

777-77-1026 | Miles Cruz  
Case Manager: Lisa Campbell  
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Home Back Desk Help Note

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- Budget Planner
- Case To-Dos
- Benefit Info
- Activity Log

Closed Cases

- Search Jobs
- Active Jobs
- Inactive Jobs
- Search Resumes
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- Account Info
- Reporting

**TABE Tests**

Sort by: Test Type **Sort** ?

Test Type	Stanine	Grade Equiv	Score
<a href="#">TF5ML</a>	5	7.6	86
<a href="#">TF5MM</a>	5	6.7	71
<a href="#">TF5MR</a>	7	12.9	122

**Add/Edit TABE Test** ?

\* Test Type Form 5 Medium - Language/Spelling

Stanine 86

Grade Equivalency 7.6

Score 86

Save ? Clear Changes ? Cancel ?

\* Required Fields: Information that is required. ? Information Bubble: Click on the bubble for specific help.

## Entering the Assessment Outcome for the TABE

### Associated Procedures: (Navigating from the Case Detail)

**CLICK** the appropriate hyperlink under the Test Detail column

**SELECT** a status of 'Complete' from the status drop down list

**ENTER** any comments you may have regarding the customer's assessment in the Outcome/Results area (this is not the area to enter the scores)

**ENTER** the date that the assessment was completed

**CLICK** 'Save/Continue' (this takes you to the Outcomes template where the scores should be entered)

The screenshot displays the 'Service Tracking' application interface. At the top, there is a header with user information: '777-77-1026 | Miles Cruz', 'Case Manager: Lisa Campbell', 'Status: Open/MN/Open-UP', 'PAS: P55623', 'RFA: 55512536279/1', and 'R/C/U: 2/2/203'. Navigation buttons for 'Home', 'Back', 'Desk', 'Help', and 'Note' are visible in the top right. A purple banner below the header contains a help message: 'Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.'

The main content area is titled 'Other' and contains a form with the following fields:

- Name of Assessment Test:** A text input field containing 'NATB'.
- Results:** A text area containing the text 'Miles need to improve his listening skills.'

Below the form are two buttons: 'Save' and 'Clear Changes', both with red question mark icons. A legend at the bottom of the form area defines symbols: a red asterisk for 'Required Fields: Information that is required.' and a red question mark in a bubble for 'Information Bubble: Click on the bubble for specific help.'

A large empty rectangular box is present at the bottom of the form area. The left sidebar contains a navigation menu with categories like 'Open Cases', 'Closed Cases', 'Search Jobs', 'Active Jobs', 'Inactive Jobs', 'Search Resumes', 'To-Do History', 'JPR Search', 'Account Info', and 'Reporting'. The Windows taskbar at the bottom shows the 'Internet' browser icon.

## Using the “Other” template to enter Assessment Outcome

### Associated Procedures: (Navigating from the Case Detail)

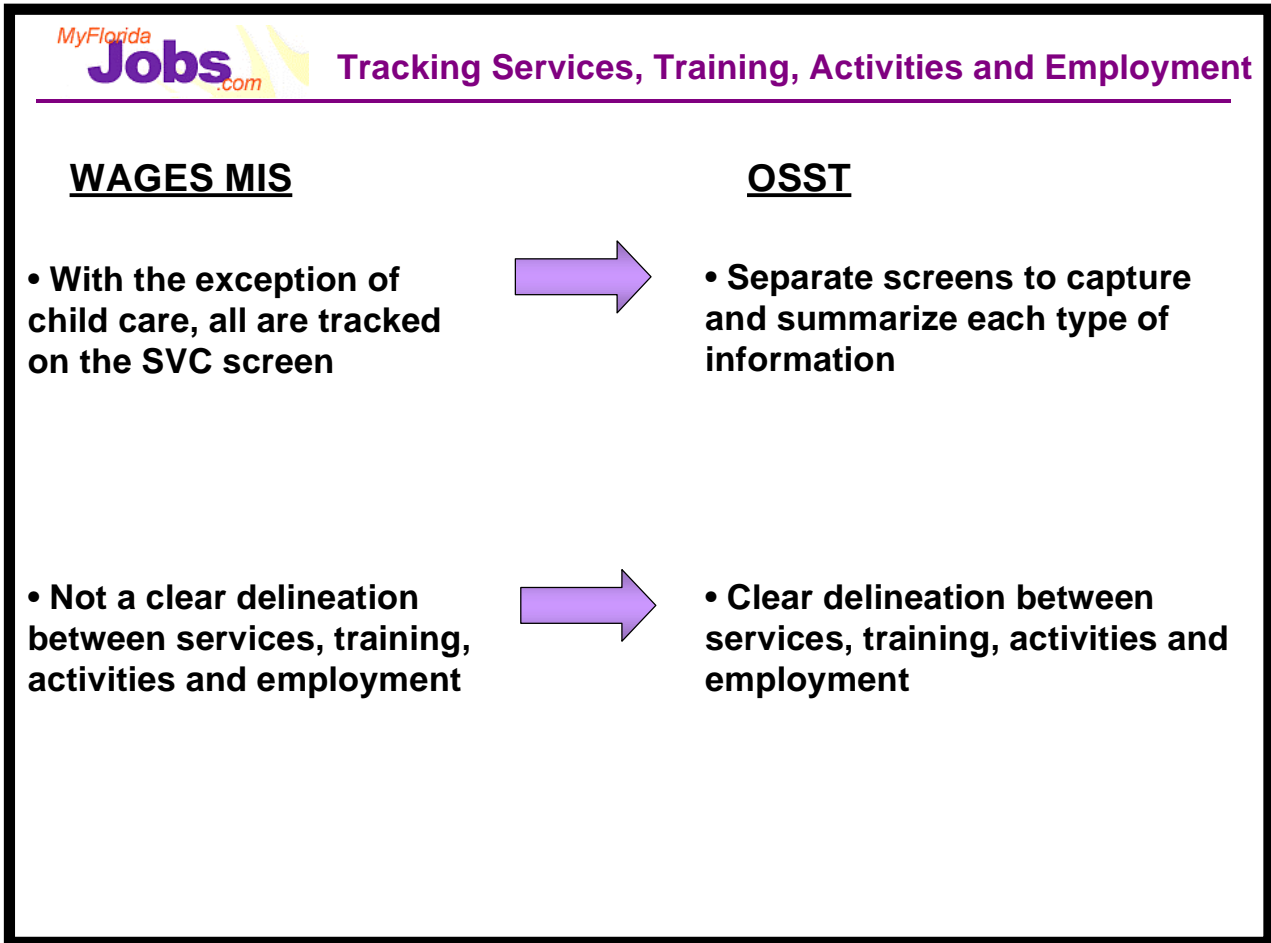
**CLICK** the appropriate hyperlink under the Test Detail column

**SELECT** a status of ‘Complete’ from the status drop down list

**ENTER** any comments you may have regarding the customer’s assessment in the Outcome/Results area (this is not the area to enter the scores)

**ENTER** the date that the assessment was completed

**CLICK** ‘Save/Continue’ (this takes you to the Outcomes template where the scores should be entered)



### Tracking Services, Training, Activities and Employment

Before we move on to tracking customer services, it's important to understand how tracking services, training, activities and employment in WAGES MIS is different from tracking services, training, activities and employment in OSST.

OSST has an area for Supportive Services, an area for Skill Development (includes Training and Activities) and an area for Placements (employment). You are able to navigate to tabs for each of these areas on the Case Detail.

The reason behind the distinction between services, training, activities and employment is to "call things what they are." For example, penalties are no longer something that is tracked on the Services page. Instead, penalties have its own tab on the Case Detail under the 'Alternative Plans' tab.

Service Tracking 777-77-1026 | Miles Cruz PAS: P55623  
Case Manager: Lisa Campbell RFA: 55512536279/1  
Status: Open/MN/Open-UP R/C/U: 2/2/203 Hide

Home Back Desk Help Note

Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.

Case at a Glance Skill Development Plan Development Alternative Plan

Return to Workload

Open Cases

- Case at a Glance
- Skill Development
- Plan Development
- Alternative Plan
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- Resume
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- Activity Log

Closed Cases

- Search Jobs
- Active Jobs
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- Search Resumes
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- Account Info
- Reporting

Case Detail for Miles Cruz

Service Plan

Sort by: Service Type Sort ?

Service Type	Start Date	End Date	Status	Days Enrolled	Total Cost
<a href="#">Bootstrap</a>	09/07/00	Present	IN PROGRESS	104	\$50.00
<a href="#">Welfare Transition Child Care</a>	Unknown		IN PROGRESS	0	\$0.00
Service Budget: \$ 0.00		Available Budget: -70.00		Dollars Spent: 70.00	

Show All ? Add

Job History/Placements

Sort by: Job Title Sort ?

Job Title	Employer	Start Date	End Date	Days Worked	Follow-up
<a href="#">Cashier</a>	Seminole Trading Po	10/02/00	Present	79	<a href="#">Follow-up</a>

Show All ? Add

Skill Development

Sort by: Activity Sort ?

Activity	Start Date	End Date	Status	Days Enrolled	Total Cost
<a href="#">Vocational Training (Primary)</a>	Unknown		IN PROGRESS	0	\$0.00
Activity Budget: \$ 0.00		Available Budget: -50.00		Dollars Spent: 50.00	

Show All ? Add

### Using the Services Pages:

The Service Plan provides you with a starting point to do several things, including:

- Adding a Service budget amount for a customer
- Adding a new service provider
- Searching for a service provider (and sort your search results)
- Recording an outcome for a service

The next series of pages will take you through the procedures of how to perform each of these actions. Once services have been added to the customer's case, the Service Plan provides a view of the customer's service history (in progress and completed), including:

- The service type
- The start date of the service
- The end date of the service
- The status of the service
- The number of days enrolled in the service
- The total cost of the service

**Service Tracking** 777-77-1026 | Miles Cruz PAS: P55623  
Case Manager: Lisa Campbell RFA: 55512536279/1  
Status: Open/MN/Open-UP R/C/U: 2/2/203 Hide

Home Back Desk Help Note

Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.

Return to Workload

**Open Cases**

- Case at a Glance
- Skill Development
- Plan Development
- Alternative Plan
- Case Notes
- Resume
- Budget Planner
- Case To-Do's
- Benefit Info
- Activity Log

**Closed Cases**

**Search Jobs**

**Active Jobs**

**Inactive Jobs**

**Search Resumes**

**To-Do History**

**JPR Search**

**Account Info**

**Reporting**

**New Service Provider**

\* Phone (850) 555 - 7531

Employment Provider?  Check if Yes

Training Provider?  Check if Yes

Service Provider?  Check if Yes

**Continue ?**

**Tips:**

To the left, enter the phone number of the provider you would like to add. The purpose of this is to validate that the provider does not already exist in the system.

Use the checkboxes to indicate what type of provider you are adding. Remember that a provider can be more than one type.

When finished, click the **continue** button.

**Confidential Fields:** Not accessible to other users if the 'No Confidential Information' disclosure level is chosen in Preferences.

**Searchable Fields:** Information that can be searched upon by other parties, such as employers and jobseekers.

\* **Required Fields:** Information that is required.

**Information Bubble:** Click on the bubble for specific help.

## Adding a Provider

### Associated Procedures: (Navigating from the Case Detail)

#### I. Add a Provider

**CLICK** the 'Skill Development' tab on the Case Detail

**CLICK** 'Add' on the Service Plan tab to begin

**CLICK** the 'search' tab to locate a provider

**CLICK** the 'Add Provider' tab located at the bottom of the search results on the 'Provider Search' results page.

**ENTER** the provider's phone number

**CLICK** the check box to indicate the addition of a 'Service Provider' (This action performs a check within the database to ensure that this provider isn't already listed)

**CLICK** 'Continue'

**Service Tracking** 777-77-1026 | Miles Cruz PAS: P55623  
Case Manager: Lisa Campbell RFA: 55512536279/1  
Status: Open/MN/Open-UP R/C/U: 2/2/203 Hide

Home Back Desk Help Note

Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.

[Return to Workload](#)

**Open Cases**

- Case at a Glance
- Skill Development
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**Closed Cases**

- Search Jobs
- Active Jobs
- Inactive Jobs
- Search Resumes
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- Account Info
- Reporting

**New Service Provider**

*	Name	ACME Child Daycare Center
*	Address	311 Main ST
	Address	STE 113
*	City	Anywhere
*	County	Orange
*	State	Florida
*	Zip	77777 - 4321
	FEID Number	777264777
*	Phone	(850) 555 - 7531
	Fax	(850) 555 - 1357
	Website	www.acmechildcare.com
	Contact	Jane Childs
	Title	Owner
	eMail	jchilds@myemail.com
	Contract Number	7771234

**Service Information**

Program Cost	50.00
Program Description	Basic Child Care services children ages 6mos to 5yrs old.

Save ? Cancel ?

**Tips:**

To the left, enter the detailed information on the selected training provider.

For changes in address information, simply type the correct information in the form.

When finished, click the **save** button.

**ENTER** the provider's name

**ENTER** the provider's address (city, county, state and zip)

**ENTER** (if available) the provider's FEID number, website address, contact person, contact's phone number and e-mail, and the related contract number

**ENTER** (if available) the program cost and a program description for that provider

**CLICK** 'Save'

### Helpful Tip:

**Tip1:** A provider may also be added by clicking one of the 'Add a new provider of services, training or employment' links on the OSST Desktop.



**Budget Information - Microsoft Internet Explorer**

### Miles Cruz's Service Budget

Allocated Service Budget :	\$	<input type="text" value="500.00"/>
Service Dollars Spent :	\$	<input type="text" value="0.00"/>
Current Available Budget :	\$	<input type="text" value="500.00"/>

**Cancel** **Save**

II. Add a Service Budget Amount for a Customer

**CLICK** the 'Skill Development' tab on the Case Detail

**CLICK** the hyperlink for the Service Budget found on the Service Plan

**ENTER** the budgeted supportive service dollar amount allocated to that customer in the Service Budget field

**CLICK** 'Save'

The screenshot displays the 'Service Tracking' application interface. At the top, the user's name 'Miles Cruz' and case details are visible. A purple banner contains a help message: 'Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.' The main content area is titled 'Provider Search' and includes a search form with the following fields: 'Provider Name Begins With' (containing 'ac'), 'ZIP Code Begins With', 'City Begins With', and 'Phone Number Begins With'. An 'Order By' dropdown menu is set to 'Name'. Action buttons for 'Search', 'Clear Changes', and 'Show All' are located at the bottom right of the form. A legend below the form defines symbols: a red asterisk for 'Required Fields: Information that is required' and a red question mark for 'Information Bubble: Click on the bubble for specific help.' A large empty rectangular box is present at the bottom of the search results area. A left-hand navigation menu lists various case management options such as 'Open Cases', 'Closed Cases', and 'Search Jobs'.

### III. Search for a Service Provider

**CLICK** the 'Skill Development' tab on Case Detail

**CLICK** 'Add' on the Service Plan tab to begin

**ENTER** your search parameters (if you don't enter any parameters, the system brings back all providers upon clicking the 'Search' button)

**CLICK** 'Search'

**Service Tracking** 777-77-1026 | Miles Cruz PAS: P55623  
 Case Manager: Lisa Campbell RFA: 55512536279/1  
 Status: Open/MN/Open-UP R/C/U: 2/2/203 Hide

Home Back Desk Help Note

Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.

**Provider Search Results** [ Click a provider name to view details ]

Sort by:  **Sort** ?

Records retrieved: 3

Select	Provider	City	Zip	Phone
<input type="checkbox"/>	<a href="#">Ace Hardware</a>	Bushnell	33513	904-793-7949
<input type="checkbox"/>	<a href="#">Acme Child Daycare Center</a>	Anywhere	77777-4321	850-555-7531
<input type="checkbox"/>	<a href="#">Acute Care</a>	Crystal River	32629	904-563-1119

[Change Search Criteria](#) **Add Provider** ?

\* **Required Fields:** Information that is required. ? **Information Bubble:** Click on the bubble for specific help.

IV. Sort Service Provider Results

**SELECT** the sort criteria of choice from the 'Sort by' drop down list

**CLICK** 'Sort' to view the search results by the parameter specified

Service Tracking

777-77-1028 | Miles Cruz      PAS: P55623  
 Case Manager: Lisa Campbell      RFA: 55512536279/M  
 Status: Open/MN/Open-UP      R/CA: 2/2/203      Hide

Home Back Desk Help Note

Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.

Return to Workload

Open Cases

- Case at a Glance
- Skill Development
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- Activity Log

Closed Cases

- Search Jobs
- Active Jobs
- Inactive Jobs
- Search Resumes
- To-Do History
- JPR Search
- Account Info
- Reporting

**Provider Information**

Name: Acme Child Daycare Center  
 Address1: 311 Main St  
 Address2: Ste 113  
 City: Anywhere  
 State: FL  
 Zip: 77777-4321  
 Phone: 850-555-7531  
 Web Site:

**Service Details**

Service Type: Welfare Transition Child Care

In House:

Anticipated Start Date: 12/01/2000      Anticipated End Date: 12/08/2000      Actual Start Date: 12/01/2000

\* Total Cost: 60.00

Status: In Progress

Do you want this displayed on the Individual Responsibility Plan?       yes       no

Save ?      Clear Changes ?      Cancel ?

## V. Add a Supportive Service

**CLICK** the notepad image to add a service detail record for the selected provider.

**SELECT** the service type from the drop down list

**ENTER** the anticipated start date and the anticipated end date (the actual start date will need to be entered once the customer actually begins the service)

**ENTER** the total cost of the service

**SELECT** the status of the service

**CLICK** 'Save'

**NOTE:** To view the service provider detail information prior to creating a service detail, simply click the hyperlink for the appropriate provider. If this is the correct provider click 'Add Provider' and the provider information and service detail page is displayed.

**Service Tracking** 777-77-1028 | Miles Cruz PAS: P5623  
Case Manager: Lisa Campbell RFA: 66512636279/1  
Status: Open/MN/Open-UP R/C/U: 2/2/203 Hide

Home Back Desk Help Note

Click on the other help bubbles to get information about individual fields. For more in depth help, click the Help button in the upper right corner.

Return to Workload

- Open Cases
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  - Skill Development
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  - Activity Log
- Closed Cases
- Search Jobs
- Active Jobs
- Inactive Jobs
- Search Resumes
- To-Do History
- JPR Search
- Account Info
- Reporting

**Provider Information**

Name: Acme Child Daycare Center  
Address1: 311 Main St  
Address2: Ste 113  
City: Anywhere  
State: FL  
Zip: 77777-4321  
Phone: 850-555-7531  
Web Site: www.acmechildcare.com

**Service Details**

Service Type: Welfare Transition Child Care

Anticipated Start Date: 12/01/2000 Anticipated End Date: 12/08/2000 Actual Start Date: 12/01/2000

\* Total Cost: 50.00

Status: Complete

Do you want this displayed on the Individual Responsibility Plan?  yes  no

**Service Outcome**

Reason for Service Outcome: Completed

Detailed Reason for Service Outcome: Completed

Actual End Date: 12/07/2000

Save ? Clear Changes ? Cancel ?

## Entering Service Outcomes

The Service Outcome function provides the ability to capture information such as:

- Reason for service completion
- Detailed reason for service completion
- Actual end date of the service

This function is part of the Service Detail page, and can be accessed by clicking on the hyperlink for an existing service from the Case Detail page.

### Associated Procedures:

#### I. Record an Outcome for an existing service

**CLICK** the 'Skill Development' tab on Case Detail

**CLICK** the hyperlink for the specific service from the Service Plan on Case Detail

**ENTER** the actual start date (if it has not already been entered)

**SELECT** a status of 'Complete' to show that the service has ended

**SELECT** the reason for the service ending from the 'Reason for Service Outcome' drop down list

**ENTER** a description of the reason for the service outcome (this is required if you selected 'Other' from the 'Reason for Service Outcome' drop down list)

**ENTER** the actual end date

**CLICK** 'Save'



## Activity: Using OSST for Initial Assessment Tasks



### Scenarios:

- **Adding Education Details**
- **Adding Goals and Interests**
- **Adding Needs and Barriers**
- **Adding Steps to Self Sufficiency**
- **Adding Assessment Detail**
- **Adding/Editing Assessment Outcomes**
- **Adding a Supportive Service**

Now it's your turn to practice using the system! Here are your scenarios:

- Adding Education details
- Adding Goals and Interests
- Adding Needs and Barriers
- Adding Steps to Self Sufficiency
- Adding Assessment Detail
- Adding/Editing Assessment Outcomes
- Adding a Supportive Service (includes searching for a provider)

*Questions?*

