State of Washington
Customer Management

Mass Scheduling
Local Office - Staff Level

March 2016
v. 1

March 2016

Contents

Course Objective

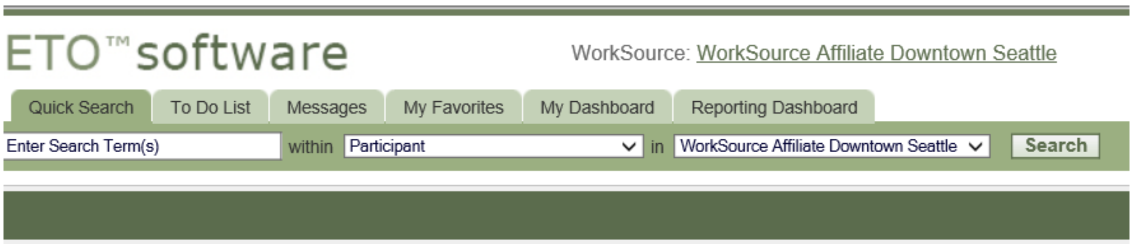
Course Objective:

This training will prepare Customer Management Staff to successfully manage Mass Scheduling. Staff should leave the training with a basic understanding of Mass Scheduling features, creating and editing an event, viewing and scheduling an appointment and recording services for a seeker. All features that will be reviewed during the class are documented in this workbook for future reference.

Navigating Mass Scheduling Features

Site and Program

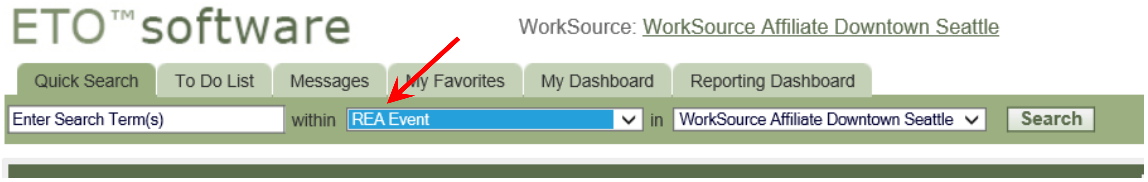
For the WorkSource solution, the site name is WorkSource and is found at the top center-left of screen. The top center-right indicates an office location.



The office location shown at the top center-right is the active office location. **All mass scheduling features will be recorded to the active office location**. A clickable link means the user account has access to more than one office location. To change to a different office location, click the office location link and select the desired office location from the dropdown list.

Navigation Methods

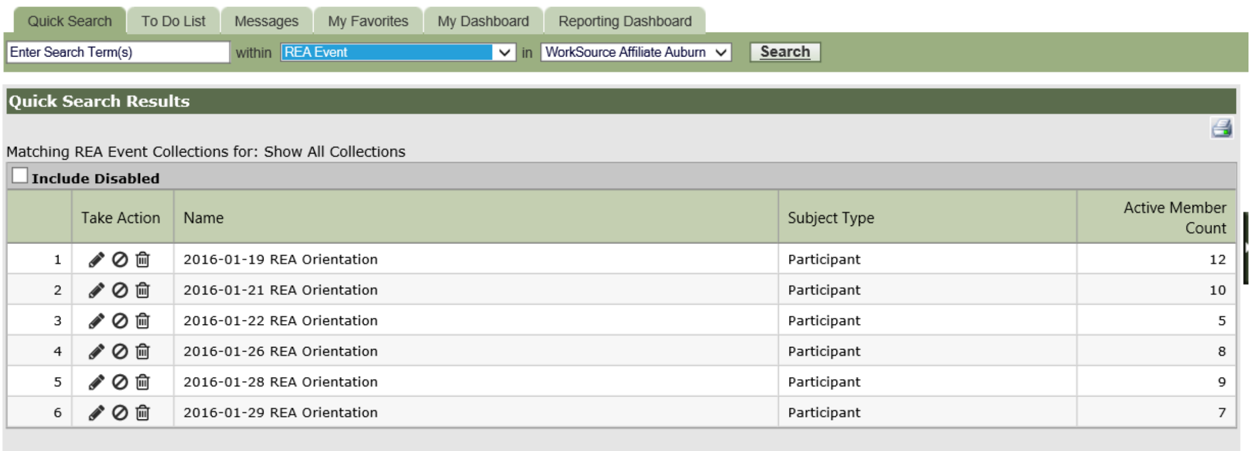
The primary method of accessing mass scheduling features is via the Quick Search quick tab.



In the **within** drop box, one or more of the following options will be available depending on the services provided by an Office. These options are under the "Collections" category in the **within** dropdown. All mass scheduling related tasks in the system use a function called "Collections," which is a term representing a group of seekers for which a specific set of actions will be taken.

REA Event	Shows a list of **past and future REA events** that have been added for the Office, into which seekers have been/will be scheduled.
REA Follow-Up	Shows a list of groups of seekers that have been **designated to receive an REA Follow-Up service.**
UIRO/REA-Lite Event	Shows a list of **past and future UIRO/REA-Lite events** that have been added for the Office, into which seekers have been/will be scheduled.
Queue: REA-English	Shows a list of seekers that were **added into the office for potential scheduling in an REA event** where their primary language is anything **other than Spanish** Note: This item is for viewing only. No user actions will need to be taken on this item.
Queue: REA-Spanish	Shows a list of seekers that were **imported into the office for potential scheduling in an REA event** where their primary language is **Spanish** Note: Only offices that regularly provide events in Spanish will utilize this list. This item is for viewing only. No user actions will need to be taken on this item.
Queue: UIRO/REA-Lite – English	Shows a list of seekers that were **added into the office for potential scheduling in an UIRO/REA-Lite event** where their primary language is anything **other than Spanish** Note: This item is for viewing only. No user actions will need to be taken on this item.
Queue: Queue: UIRO/REA-Lite – Spanish	Shows a list of seekers that were **added into the office for potential scheduling in an UIRO/REA-Lite event** where their primary language is **Spanish** Note: Only offices that regularly provide events in Spanish will utilize this list. This item is for viewing only. No user actions will need to be taken on this item.

To see any of these items, set the **within** dropdown to the desired event or list. Set the **in** dropdown to the Office name (it will default to the Office currently active.) '**Enter Search Term(s)'** can be left blank - or - to narrow search results, enter a specific search term, e.g. "Orientation", in the Enter Search Terms(s) field and click "Search." After searching for an item, the resulting list will contain the event's name, and active member count (i.e. how many seekers are in the event.)



	Take Action	Name	Subject Type	Active Member Count
1		2016-01-19 REA Orientation	Participant	12
2		2016-01-21 REA Orientation	Participant	10
3		2016-01-22 REA Orientation	Participant	5
4		2016-01-26 REA Orientation	Participant	8
5		2016-01-28 REA Orientation	Participant	9
6		2016-01-29 REA Orientation	Participant	7

The search results will show 50 items per page. If there are more than 50 items, use the arrow options to navigate between pages of results.

Action Links

Each event will contain one or more of the following options, depending on user level.

 Use the pencil icon to edit the details of the event or list.

 Use this icon to disable the event. This does not delete the event. It simply hides it from view in the search results.

 Use this icon to completely delete the event. Only users with a system administrator level have access to delete an events.

All events have a **Dashboard**, providing a view of the seekers in the event and links to take other actions on the event, such as recording services. Access this by clicking on the Name of the event in the search results.

Manage Events

Event Creation
All upcoming events (REA/UIRO) will be added directly into the system by office users. Added events will appear in the Quick Search depending on the event item searched for (REA Event, UIRO/REA-Lite Event.) These events will then be filled automatically.

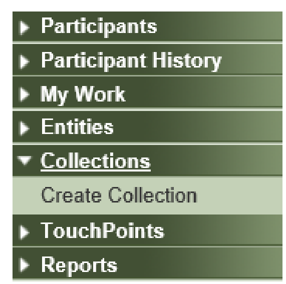
When can I create an event?
An automated system process will run every Monday to fill events that have an event date within 7-11 days from that Monday. In order for an event to be included in this process it must be created by **Friday at 5:00pm Pacific Standard Time.** For example, if today is Friday February 12th, and I have an event taking place on Tuesday February 16th, I must add that event into the system by the end of the day today so that on Monday the event is filled. If I waited past 5:00pm today and entered the event, it would not be filled (the system will ignore it.)

How far in advance can I create an event?
Events can be created **as far in advance as desired** (i.e. you can create events for the next 2 months, 6 months, etc..)

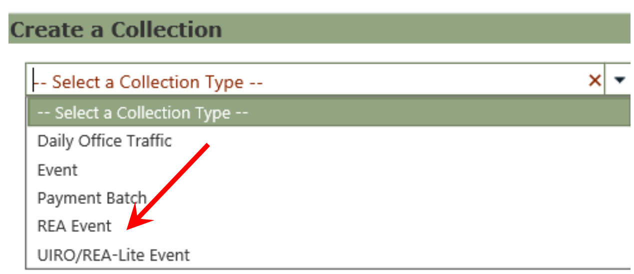
What information do I need to have to create an event?
The **date, start and end time, and maximum number of attendees** is required for all events. The maximum number of attendees is used by the system process to know how many seekers can be placed in the event.

Adding a New Event

1. Select **Collections** from the Navigation Bar on the right side of the screen. Then select "Create Collection."



From the 'Select a Collection Type' dropdown box select the type of event to be created.



The following events types should be used.

REA Event	Available to all offices. Offices that provide RESEA services should use this event type for RESEA events.
UIRO/REA-Lite Event	Available to **some offices** that provide this type of service.

Do not use the collection type "Events." This type is not related to the Mass Scheduling process.

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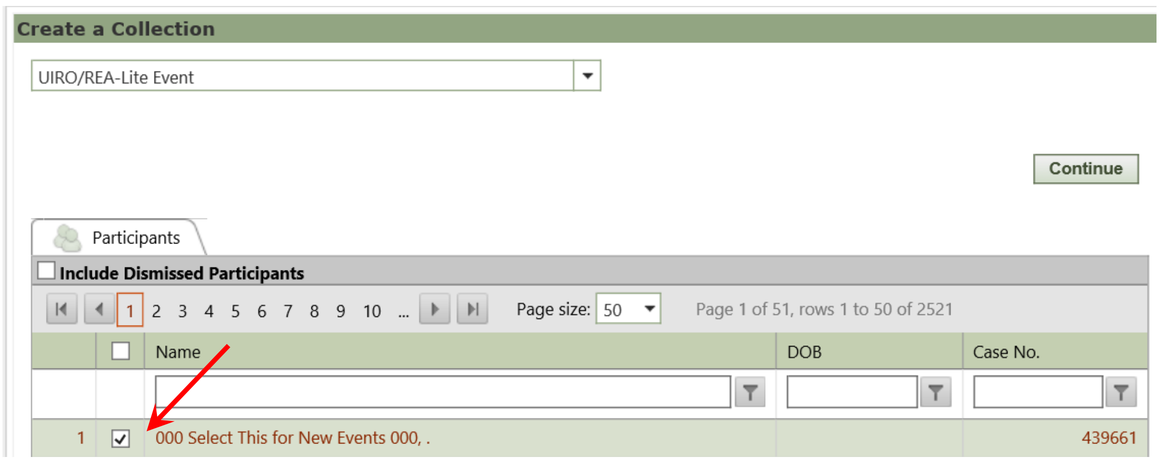
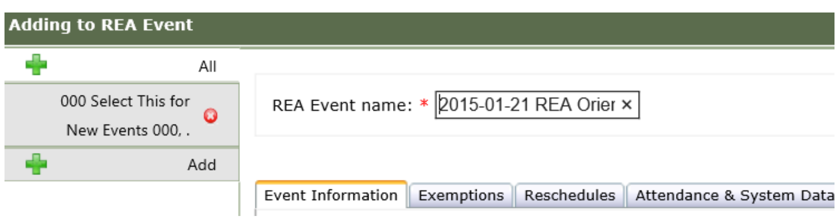
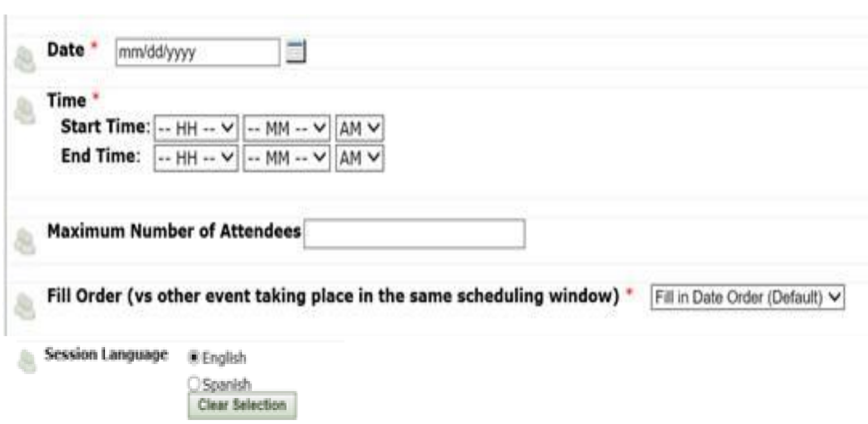
2. Select the record “000 Select This for New Events 000” and then select Continue. This selection is a dummy placeholder seeker required to create an “empty” event. (If you do not see “000 Select This for New Events 000” at the top of the list, sort the list by clicking on Name, and it will be at or close to the top.)



3. Give the event a name. While any name is allowed, the recommended naming convention for the event to support sorting events by date in search results and reports is “YYYY-MM-DD” + [Any other text]. Examples:
    a. 2015-10-09 REA Orientation – Morning
    b. 2015-10-09 REA Orientation – Afternoon
    c. 2015-11-12 UIRO Orientation Session
    d. 2015-11-15 UIRO Orientation – Spanish



4. Fill in the details of the event on the Event Information tab, including the required items: date, time, and maximum number of attendees.

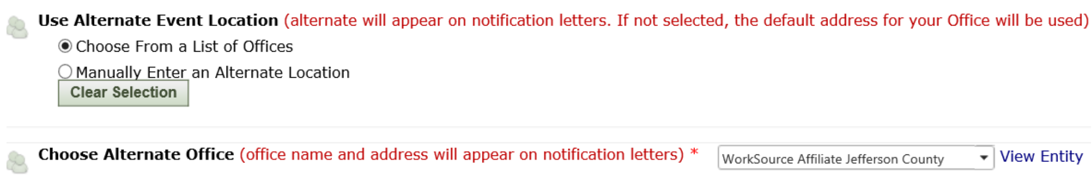


A fill order option allows the user to select a priority order for up to 9 events per type in a given scheduling window (e.g. 9 English REA events, 9 Spanish rea events, 9 UIRO English, 9 UIRO Spanish). There will be a default value of “Fill in Date Order (Default)”. Offices do not have to set a different priority for every event. Example: If there are 5 events in the scheduling window, and user wants the Friday event to be picked first (e.g. before a Tuesday event), they would select “1st” for that Friday event, and leave the priority as the default value for the rest of the events - the remaining will be filled in date order of the event.

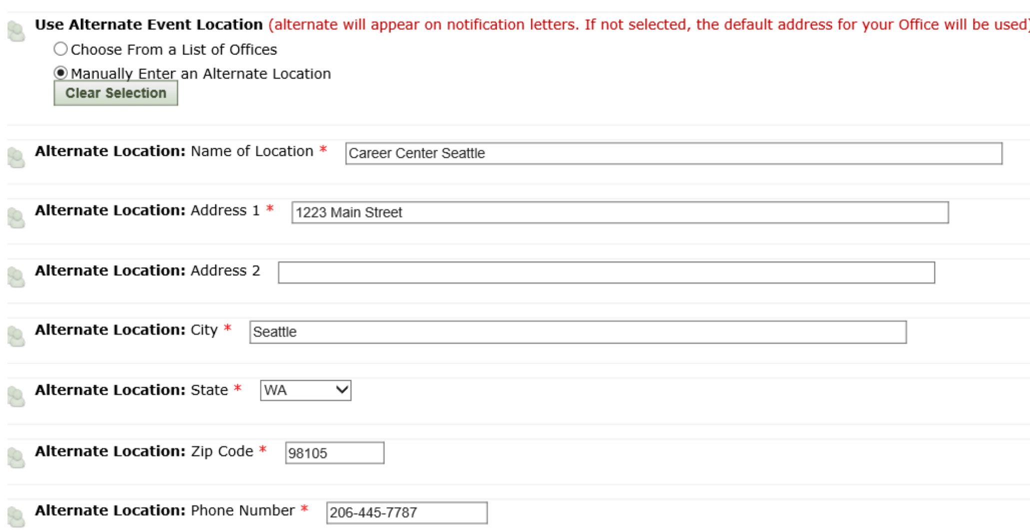
If two events are given the same priority, they will be filled in date order of the event.

Note: Offices that provide events in either English or Spanish will see an option to select English or Spanish when creating an event. The default setting is English. Offices that do not regularly provide a session in Spanish will not see this question. Their events will default to English.

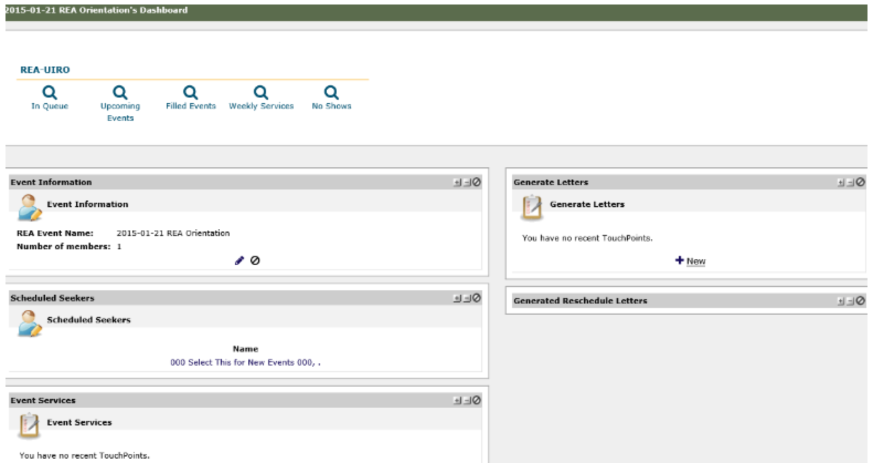
5. ‘Use Alternate Event Location’ to select a different location for the event from the default location. The default location is the Office in which the event is being created. To choose a different location:
    a. Select ‘Choose From a List of Offices’ and select another Office as the event location.



    b. OR Select ‘Manually Enter an Alternate Location’ and then complete a set of fields for the alternate location name, address, and phone.

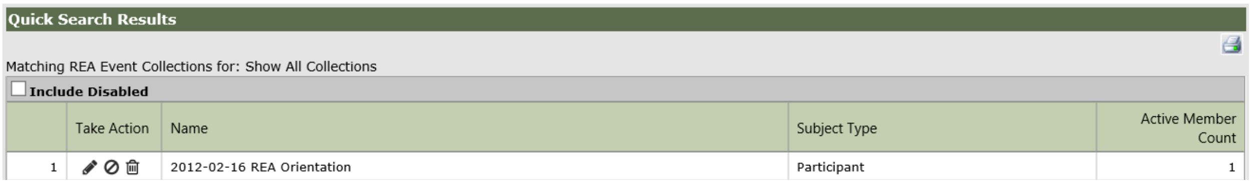


6. Click Save to create event. User is redirected to the **Dashboard** of the event created.



Viewing Created Events

Once an event is created, view the event using the Quick Search as outlined in Navigation Methods. Note that the member count will show a 1, representing the dummy placeholder seeker that was selected when the event was created.



This placeholder **does not need to be removed** from the event. The system automatically accounts for this dummy placeholder seeker when calculating an events capacity (i.e. if the event's capacity is 10, the system knows that it can add a total of 10 seekers to the event, even though the dummy placeholder seeker is in the event.)

Edits to an Event

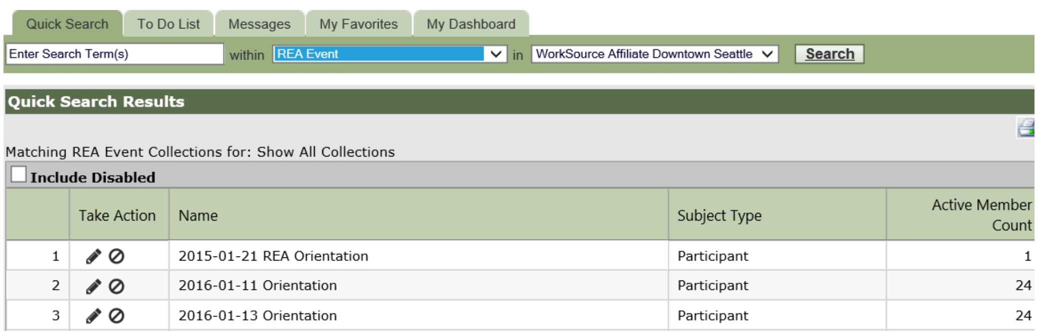
After an event has been created, edits can be made to change the date, time, location, or capacity. Edits must be done within a specific timeframe to take effect in automated scheduling and notification letter generation.

If the event to be edited has a date within a 7-11 day window from the following Monday, edits to the event must be done before **Friday at 5:00pm Pacific Standard Time** before the following Monday.

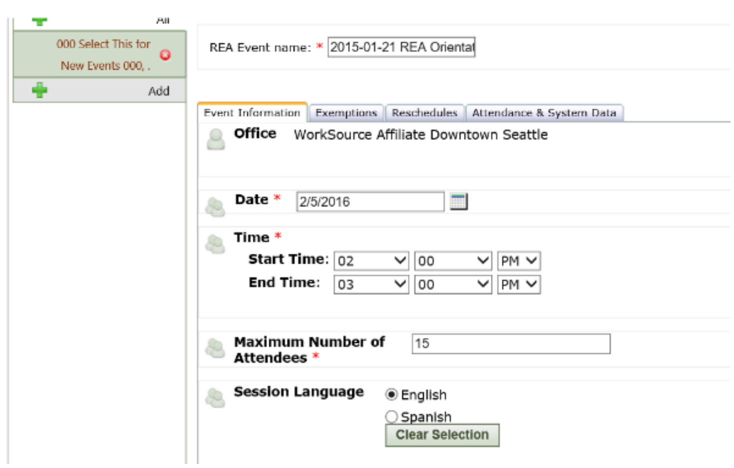
> **Example: Change the date of an event**
> If today is Friday February 12th, and I have an event taking place on Tuesday February 16th that I need to change to Wednesday February 17th, I must change the event date by the end of the day today so that on Monday February 15th the edited event is filled.
>
> **Example: Change the capacity of an event**
> If today is Thursday February 11th, and I have an event taking place on Tuesday February 16th, with a capacity of 20 seekers, and I would like to reduce the capacity to 15 seekers, I must change the capacity before the end of the day on Friday February 12th, so that my change will take affect before the automated scheduling process on Monday February 15th.

Editing an Event

Use the Quick Search, setting the 'within' option to the type of event to be edited and click Search. The screen will show a list of events that have been created for the Office, as covered in Navigation Methods. Select the pencil icon for one of the listed events

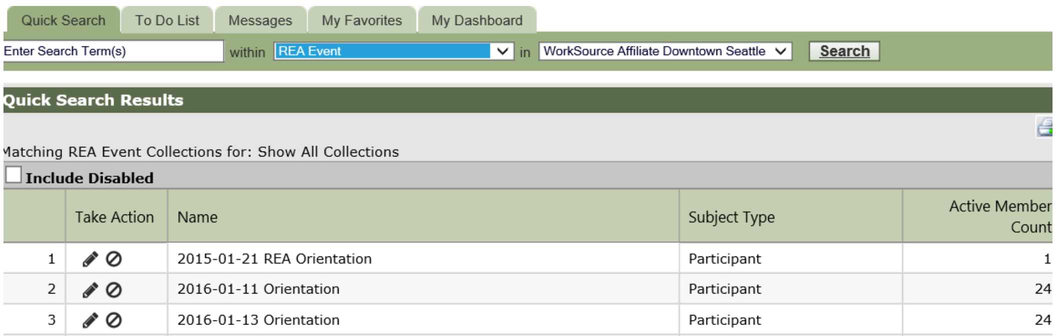


On the Event Information tab, change any of the date, time or maximum number of attendees and Save.



View Upcoming Events

While Quick Search can be used to search for events, it does not show all the details needed to view reschedule, such as the date, time, type, and event language.

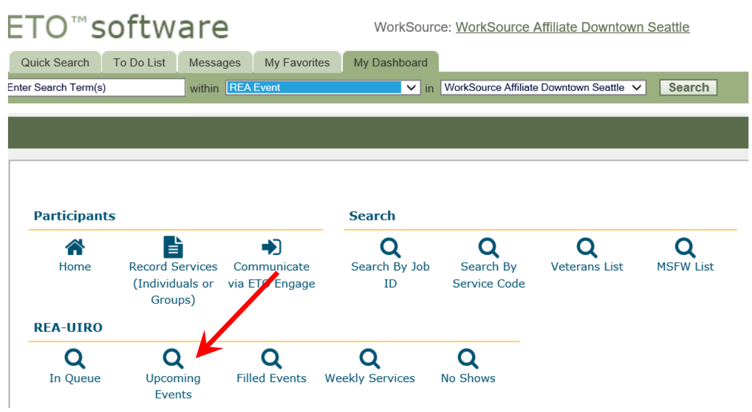


	Take Action	Name	Subject Type	Active Member Count
1		2015-01-21 REA Orientation	Participant	1
2		2016-01-11 Orientation	Participant	24
3		2016-01-13 Orientation	Participant	24

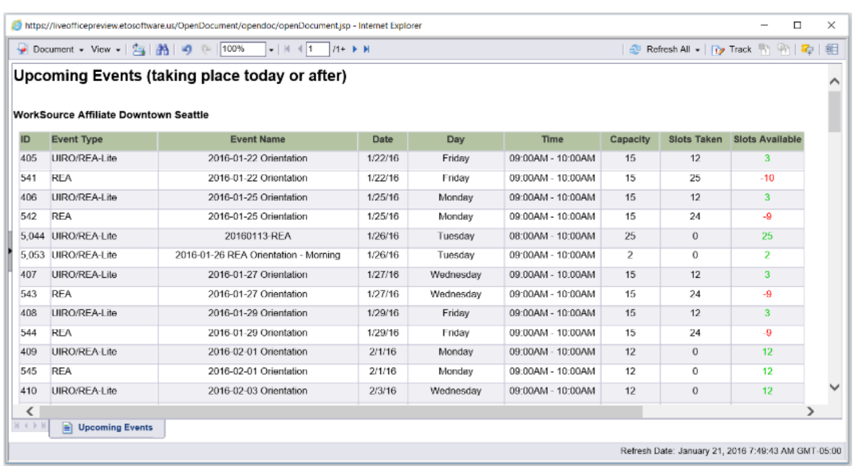
Upcoming Events View

A secondary event listing was created that will just show the events taking place after today's date, along with all of the event details, including how many slots in the event have been taken. It includes both REA Events and UIRO/REA-Lite Events (whereas the Quick Search results only show one or the other based on the item selected in the 'Within' option.)

To access the Upcoming Events view, select the **My Dashboard.** Then select **Upcoming Events**.



A second window or tab will open displaying upcoming events.



Upcoming Events (taking place today or after)

WorkSource Affiliate Downtown Seattle

ID	Event Type	Event Name	Date	Day	Time	Capacity	Slots Taken	Slots Available
405	UIRO/REA-Lite	2016-01-22 Orientation	1/22/16	Friday	09:00AM - 10:00AM	15	12	3
541	REA	2016-01-22 Orientation	1/22/16	Friday	09:00AM - 10:00AM	15	25	-10
406	UIRO/REA-Lite	2016-01-25 Orientation	1/25/16	Monday	09:00AM - 10:00AM	15	12	3
542	REA	2016-01-25 Orientation	1/25/16	Monday	09:00AM - 10:00AM	15	24	-9
5,044	UIRO/REA-Lite	20160113-REA	1/26/16	Tuesday	08:00AM - 10:00AM	25	0	25
5,053	UIRO/REA-Lite	2016-01-26 REA Orientation - Morning	1/26/16	Tuesday	09:00AM - 10:00AM	2	0	2
407	UIRO/REA-Lite	2016-01-27 Orientation	1/27/16	Wednesday	09:00AM - 10:00AM	15	12	3
543	REA	2016-01-27 Orientation	1/27/16	Wednesday	09:00AM - 10:00AM	15	24	-9
408	UIRO/REA-Lite	2016-01-29 Orientation	1/29/16	Friday	09:00AM - 10:00AM	15	12	3
544	REA	2016-01-29 Orientation	1/29/16	Friday	09:00AM - 10:00AM	15	24	-9
409	UIRO/REA-Lite	2016-02-01 Orientation	2/1/16	Monday	09:00AM - 10:00AM	12	0	12
545	REA	2016-02-01 Orientation	2/1/16	Monday	09:00AM - 10:00AM	12	0	12
410	UIRO/REA-Lite	2016-02-03 Orientation	2/3/16	Wednesday	09:00AM - 10:00AM	12	0	12

Upcoming Events

Refresh Date: January 21, 2016 7:49:43 AM GMT-05:00

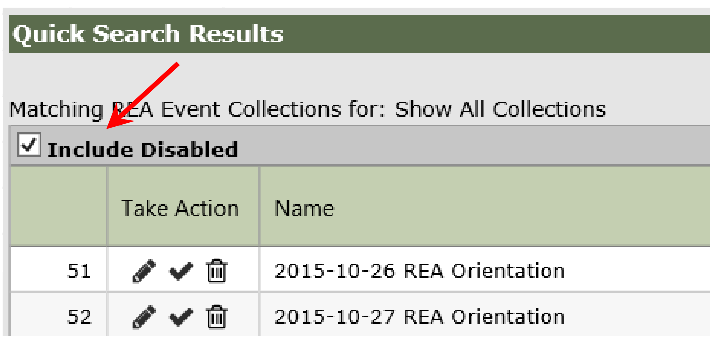
Disabling/Enabling Events

Over time, the list of events added to the system will get longer and longer, such that multiple pages of events will exist. Finding the event will require either searching for it specifically by name, or paging through the events until the desired one is found.

To avoid this, use the option to hide the event from the list. It is advised to use this once an event has passed and no further information needs to be added to it (i.e. services have already been recorded.) This does not delete any of the information for the event.

To see events that have been disabled, select the "Include Disabled" option. Disabled events will appear with a check mark ( ) icon. Click the check mark to re-enable the event, in which case it will appear again in search results.

To hide disabled events uncheck the "Include Disabled" option.



Deleting an Event

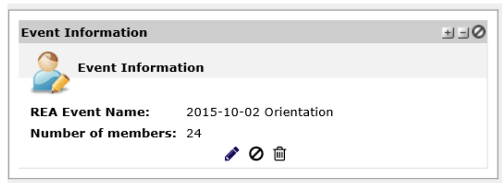
Deleting an event (icon) will only be permitted by a Program Manager. It will completely remove the event including all seekers that were added to the event and all associated information, including any services recorded for the event. This should be an extremely rare event. This might be needed if a user has access to multiple offices and creates an event inadvertently in the wrong office.

Dashboard for Collections

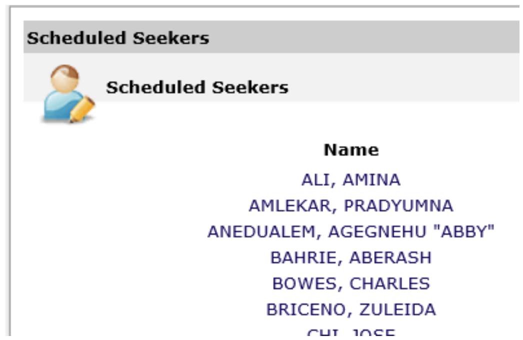
Click a particular event or list name to be navigated to that event/list's dashboard, from which other actions can be taken. The REA Event and UIRO/REA-Lite events have the same dashboard design. The REA Follow-Up dashboard is slightly different.

Each dashboard has the following sections:

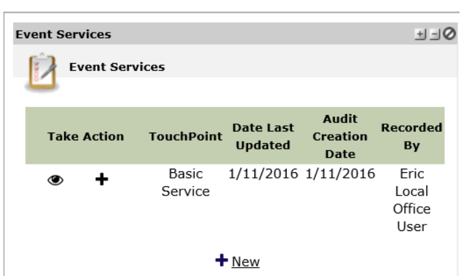
Information section: has the same action link options available that were in the search results. The pencil icon in this section will allow editing of the event's details.

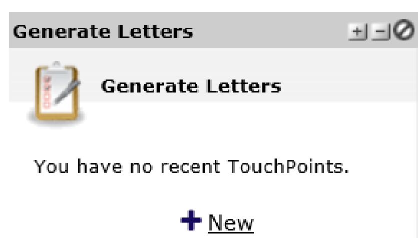


Seekers section**:** contains a list of all seekers that are in the event/list. Click one to navigate to the individual dashboard of that seeker.



Services and Letters section: sections that have a New option. These sections are used to record event services for seekers and to cue the system to generate an appointment letter for one or more seekers.





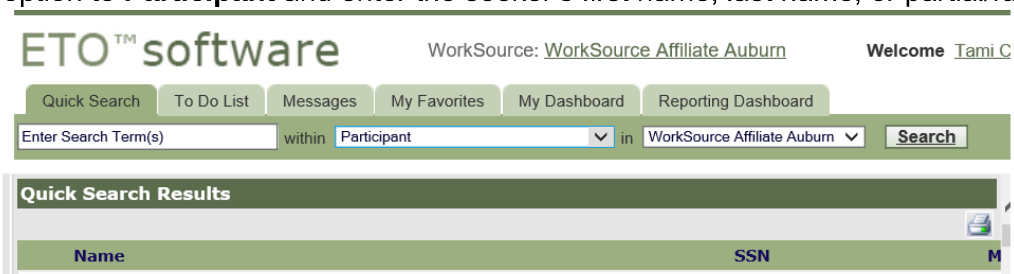
Manage Appointments

Viewing a Seeker’s Past and Future Appointments

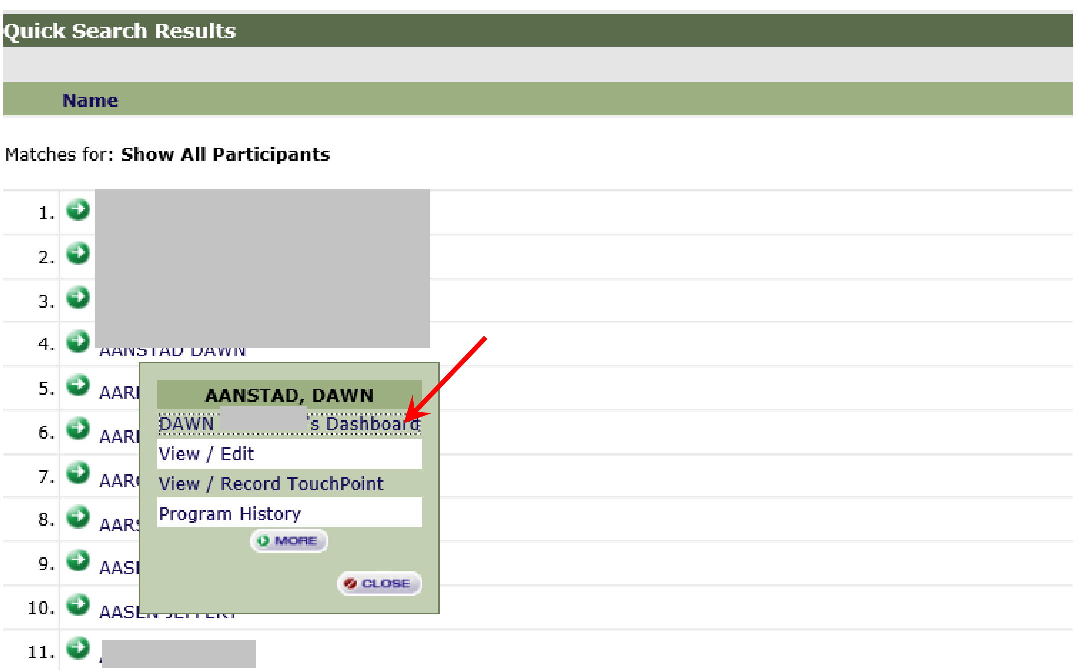
Once a seeker has been added to an event or an REA Follow Up list, the event/list information will appear on the Participant Dashboard. This can be used to find out a seeker’s currently scheduled appointments. For example, if a seeker calls to reschedule an appointment, navigate to their dashboard to see the events they have been added to. Select the event name to navigate directly from there to the event to do a reschedule (See Rescheduling a Seeker’s First Appointment.)

Participant Dashboard

Using the Quick Search, search for seeker and access seeker’s dashboard. Set the **within** option to **Participant** and enter the seeker’s first name, last name, or partial/full SSN.



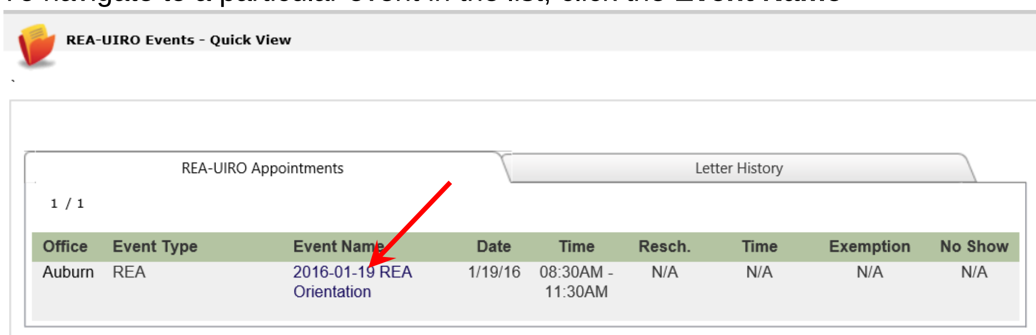
In the Quick Search Results, click the name of a seeker, and then click the **Dashboard** link.



On the seeker's dashboard, locate the REA-UIRO Events dashboard part. If the part is empty, that means that the seeker has not been added to any events. Otherwise, one row of information will appear for each event or REA Follow-Up list the seeker is associated with. The following elements appear for each event:

- Office – the office that created the event.
- Event Type – the type of event (REA, UIRO/REA-Lite, REA Follow-Up.)
- Event Name – the name of the event, as entered by the user that created the event.
- Date – the date of the event.
- Time – the time of the event.
- Resch. – shows the date of a reschedule for that event, if the seeker was rescheduled.
- Time – shows the time of the reschedule for that event, if the seeker was rescheduled.
- Exemption – shows a flag if the seeker was exempted from that event.
- No Show – shows a flag if the seeker was automatically marked as a No Show for that particular event.

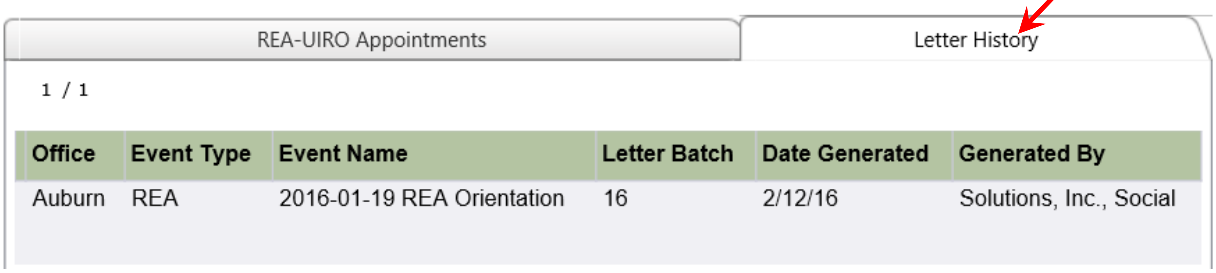
To navigate to a particular event in the list, click the **Event Name**



Office	Event Type	Event Name	Date	Time	Resch.	Time	Exemption	No Show
Auburn	REA	2016-01-19 REA Orientation	1/19/16	08:30AM - 11:30AM	N/A	N/A	N/A	N/A

This dashboard part also provides a view of the appointment letters that have been generated for this seeker. Click on the **Letter History** tab. This tab shows the following information:

- Office – the office that created the letter.
- Event Type – the type of event (REA, UIRO/REA-Lite, REA Follow-Up.)
- Event Name – the name of the event, as entered by the user that created the event.
- Letter Batch – the system ID attached to the letter that was generated.
- Date Generated – the date the letter was generated.
- Generated By – the system user that generated the letter.



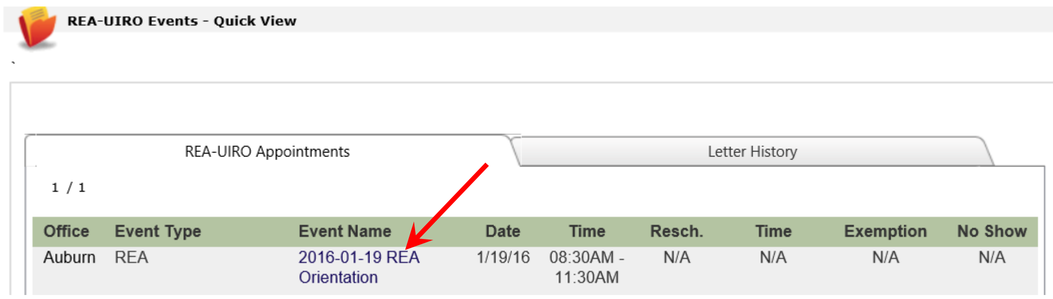
Office	Event Type	Event Name	Letter Batch	Date Generated	Generated By
Auburn	REA	2016-01-19 REA Orientation	16	2/12/16	Solutions, Inc., Social

Note: Letters cannot be opened from this screen. Opening letters will always be done from the Event's dashboard, rather than the seeker dashboard.

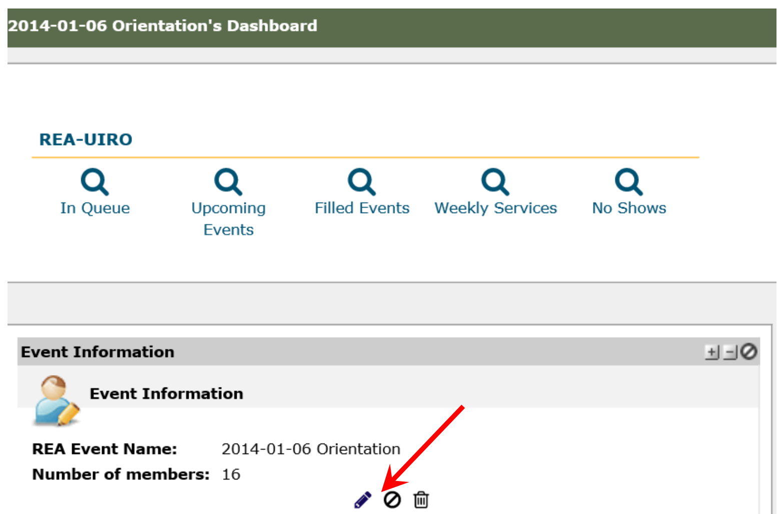
Rescheduling a Seeker's First Appointment

Navigate to the seeker's dashboard.

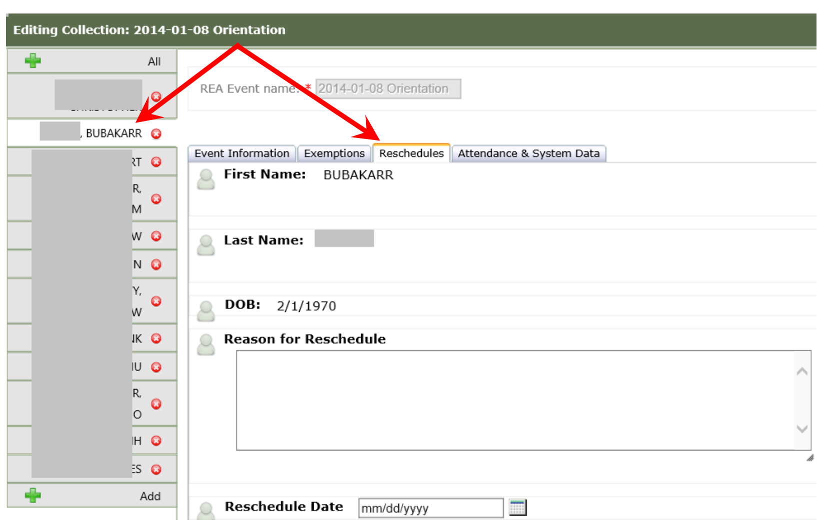
On the seeker's dashboard, locate the REA-UIRO Events dashboard part. Find the event for which the seeker needs a reschedule and select the **Event Name.**



User is directed to the event's dashboard. Select the pencil icon to edit the event information within the **Event Information** dashboard part.

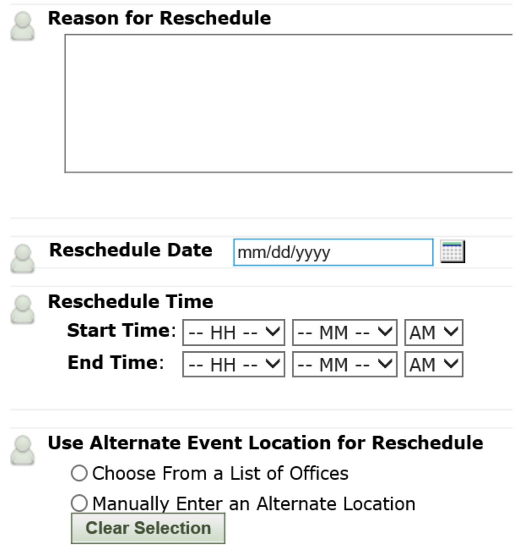


Select the seeker to be rescheduled from the list on the left and select the Reschedules tab.



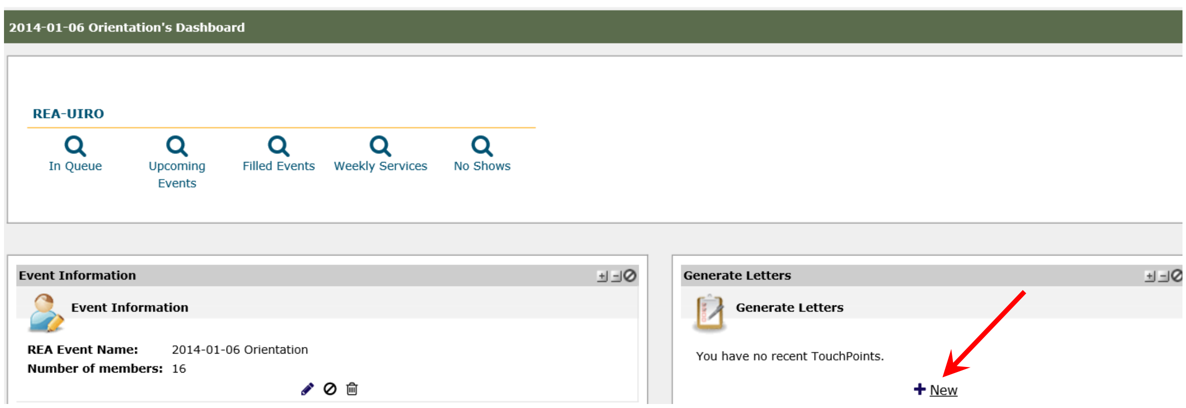
Enter a ‘Reason for Reschedule’, ‘Reschedule Date’, and ‘Reschedule Time’. Save.

Note: It is possible to reschedule multiple seekers at the same time. To do this, fill out the **Reschedules** tab for each seeker then Save.

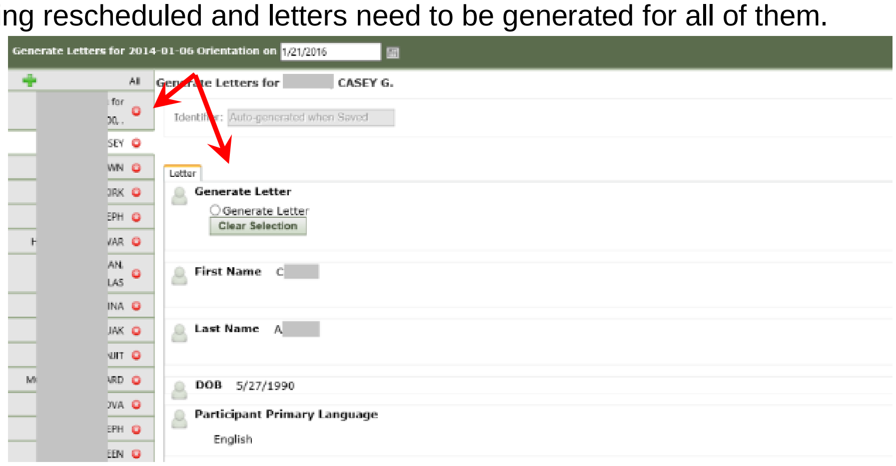


Generate appointment letter for rescheduled appointment

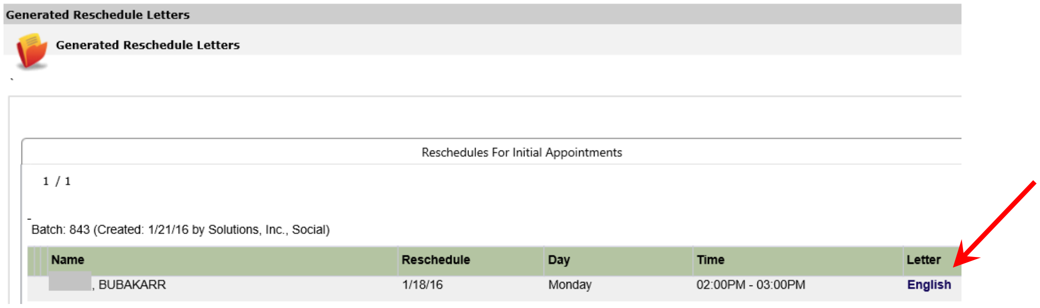
To generate an appointment letter with the reschedule information for the seeker(s) locate the Generate Letters dashboard part (from **Event dashboard**) and select New.



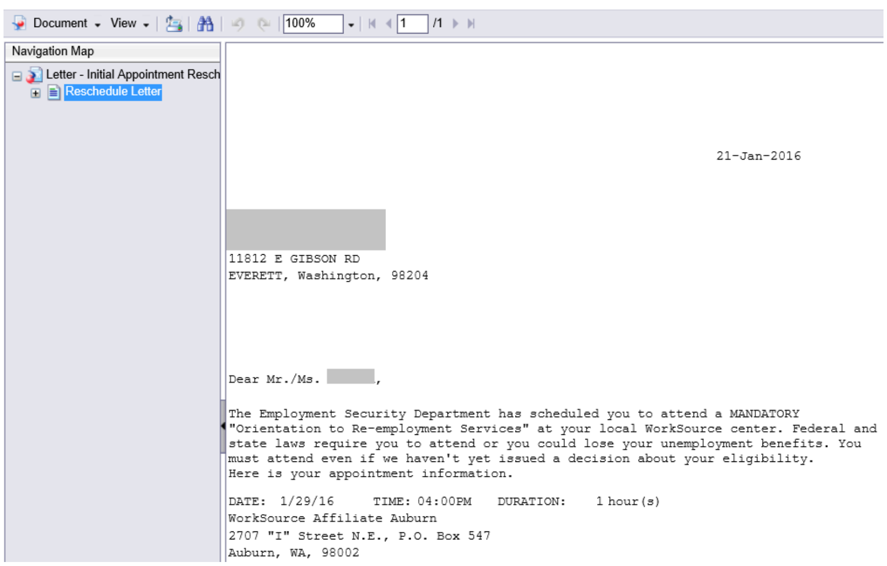
Select the seeker(s) being rescheduled. Select **Generate Letter** and then Save. Select each seeker individually and select **Generate Letter**. DO NOT click Generate Letter from the All tab unless all seekers are being rescheduled and letters need to be generated for all of them.



User is redirected to the event's dashboard. Find the **Generated Reschedule Letters** dashboard part. If the part is minimized select the + icon to maximize it. Click the blue link next to the rescheduled seeker to open the notification letter.



A separate tab or new window will open and load a letter. Select the Printer icon to print. Your browser may prompt you to Open or Save the document. Select Save to save the file on your computer.

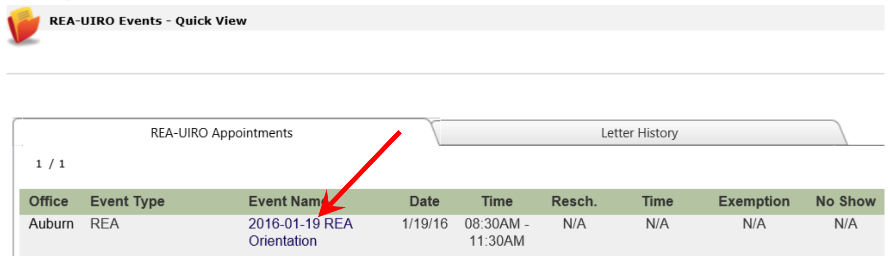


Note: If appointment needs to be rescheduled again, prior to date of event, change the reschedule date, and regenerate a letter.

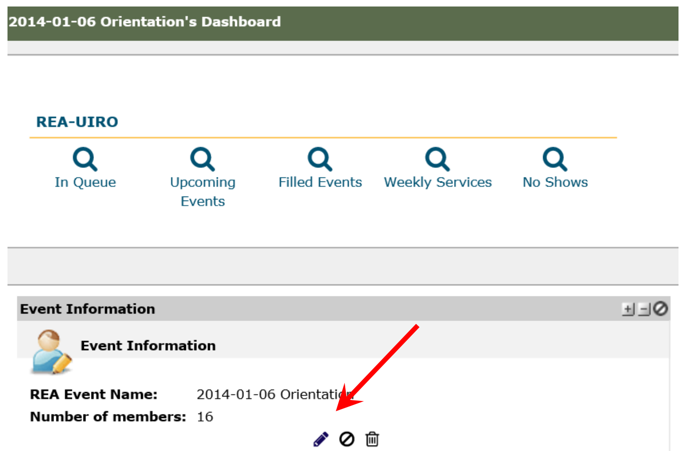
Manage Exemptions

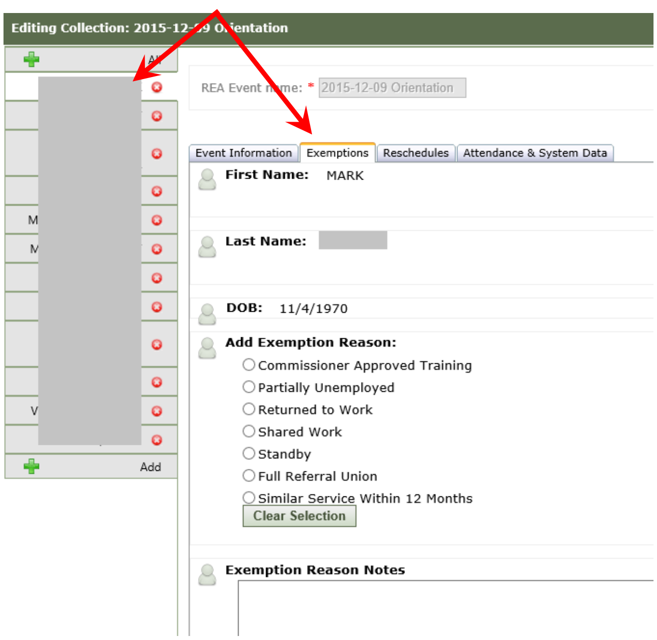
Access the seeker's dashboard.

On the seeker's dashboard, locate the REA-UIRO Events dashboard part. Find the event for which the seeker needs an exemption and select the **Event Name**



User is directed to the event's dashboard. Select the pencil icon to edit the event information within the **Event Information** dashboard part.

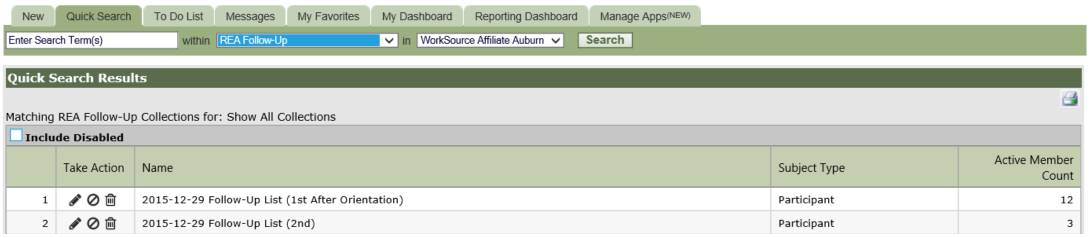




Select the seeker to be exempted from the list on the left. Select the Exemptions tab. Enter a reason in **Add Exemption Reason** and any **Exemption Reason Notes** and then Save.

Manage Follow-Up Appointments

On Saturdays, an automated process will add lists of seekers that are required to attend a follow-up REA appointment. This process identifies seekers that are tagged by an external system with a follow-up flag and that have had a service with “Follow Up in 3 Weeks” or “Follow Up in 4 Weeks” recorded for an earlier appointment. Two types of lists are generated depending on when and what kind of service was delivered. Both types will appear when using the **Quick Search** within **REA Follow-Up**



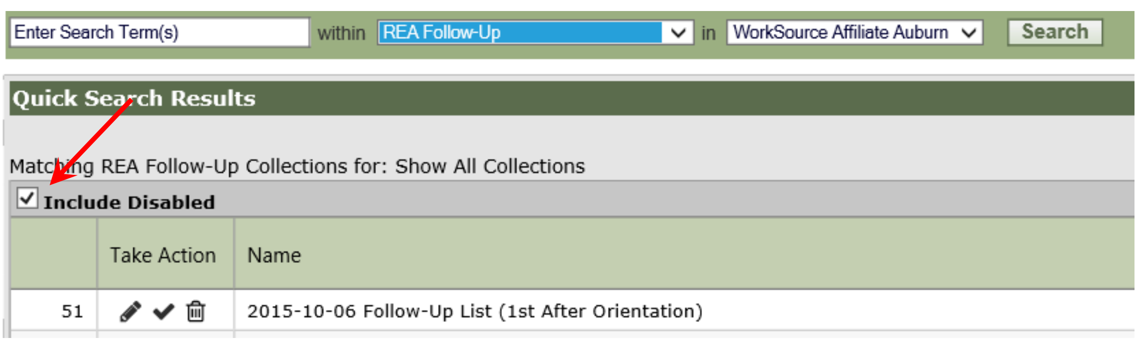
These lists will always be generated with the following naming convention:

1. YYYY-MM-DD Follow-Up List (1st After Orientation)
2. YYYY-MM-DD Follow-Up List (2nd)

The date (YYYY-MM-DD) will be the Saturday on which the list was generated.

The active member count in the list shows how many seekers were identified to receive a follow-up appointment. Once the list has been generated, specific appointment dates and times for the follow-up appointments can be set.

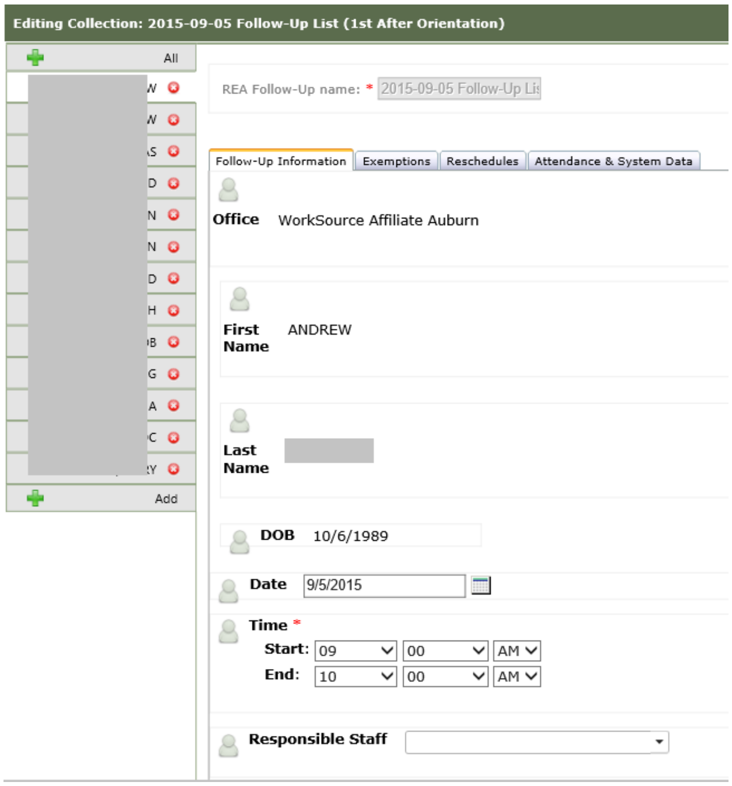
Once all the seekers in the list have had their appointments and any services have been recorded, use the ⊘ option to hide the list. This does not delete any of the information for the list. It simply hides it from view. You can always re-enable the list by using the Include Disabled checkbox from the Quick Search Results screen. Click the checkmark icon to re-enable the list (✔ icon.)



Setting Follow-Up Appointments

Follow-Up Appointments are set by editing the automatically generated Follow-Up Lists. Search within **REA Follow-Up** and select the **Name** of the list from the Quick Search Results**.** User is directed to the dashboard for the chosen list. Select the pencil icon to access the list.

The list of seekers on the list includes everyone that was tagged as needing a follow-up appointment. Select a specific seeker and then fill out the **date**, **time**, and **responsible staff** for the appointment.



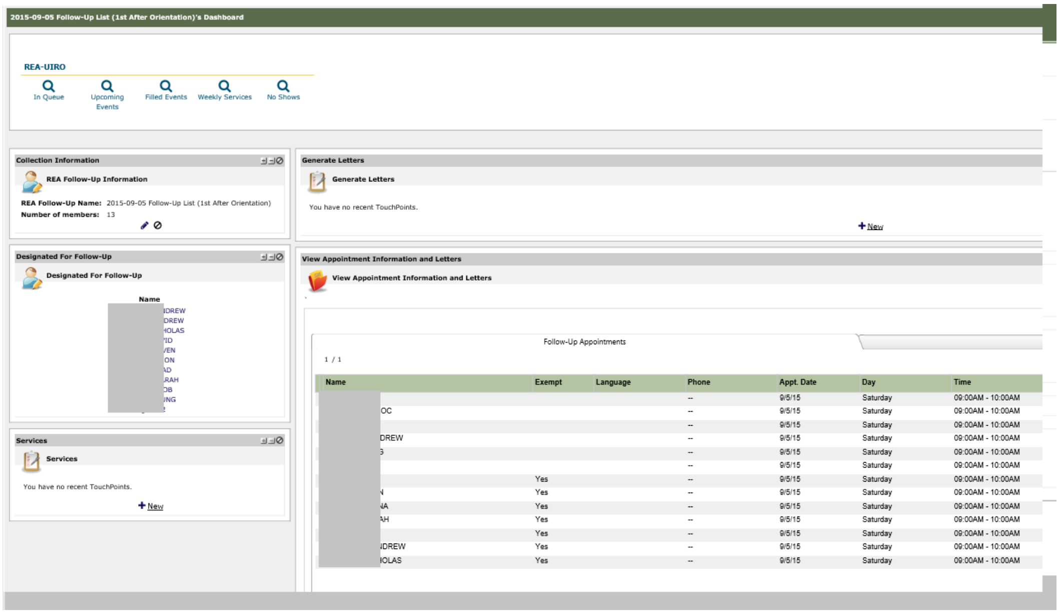
Fast Method: If **all of the seekers** on the list will be attending on the **same day**, use the **All** tab to auto-fill the date for all seekers. Select the All tab and put in a date. Then click any specific seeker. This will automatically populate that date to **all seekers in the list**. Additionally, to see each seeker one hour apart, set the time on the all tab. Then click an individual seeker's tab and make a slight modification to the time.

Example:

The list has 5 seekers. I plan to see them all on the same day at 9am, 10am, 11am, 12pm, and 3pm. On the all tab, I set the date and 9:00am for the time. Once I click any of the 5 seekers, the date and 9am will populate to all 5 seekers. I then click the second seeker and change the time from 9am to 10am. I click the third seeker and change the time to 11am. This is faster than setting the full date and time for each seeker individually. **However, I must be careful to edit each of the times so that I don't accidentally set the same appointment time for two seekers**.

Not all seekers need to have appointments set at once. Set appointments for only some seekers and Save, and then come back in later to create additional appointments.

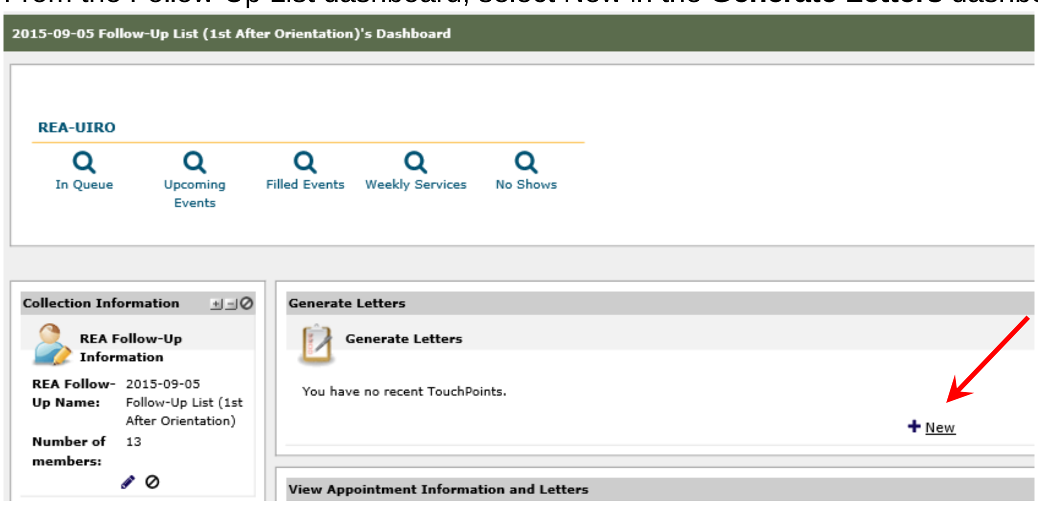
Once saved, user is redirected to the list's dashboard. The View Appointment Information and Letters dashboard part will display a list of the seekers that were added to the list, along with the appointment information that has been set for them.



Generating Letters for Follow-Up Appointments

Once appointments have been set, generate a single letter or set of letters for the seeker(s) that have been scheduled.

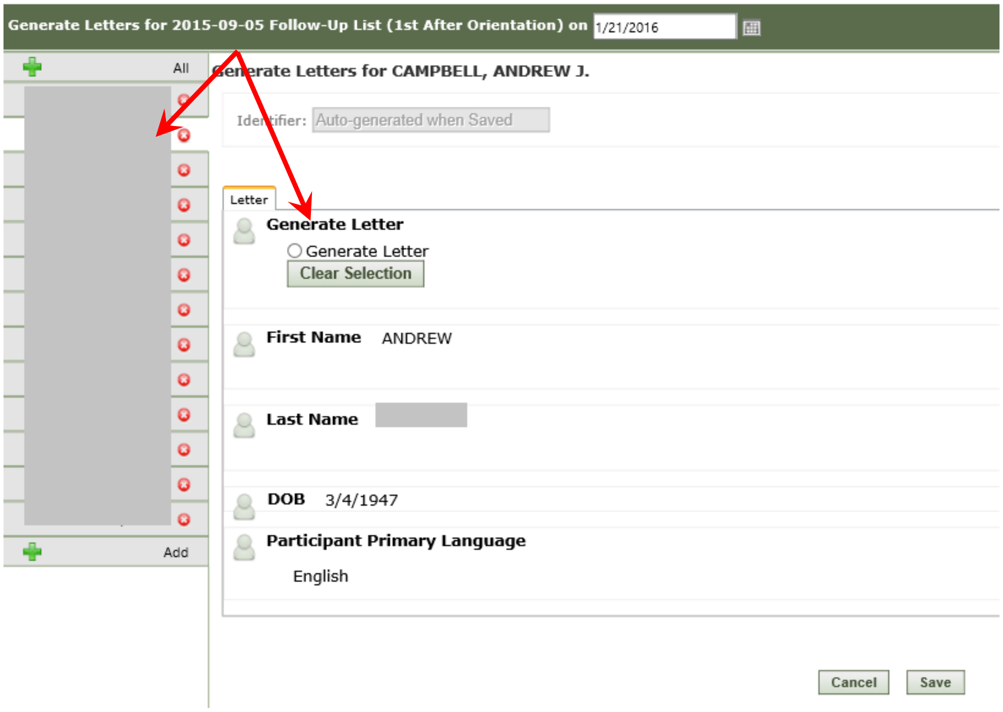
From the Follow-Up List dashboard, select New in the **Generate Letters** dashboard part.



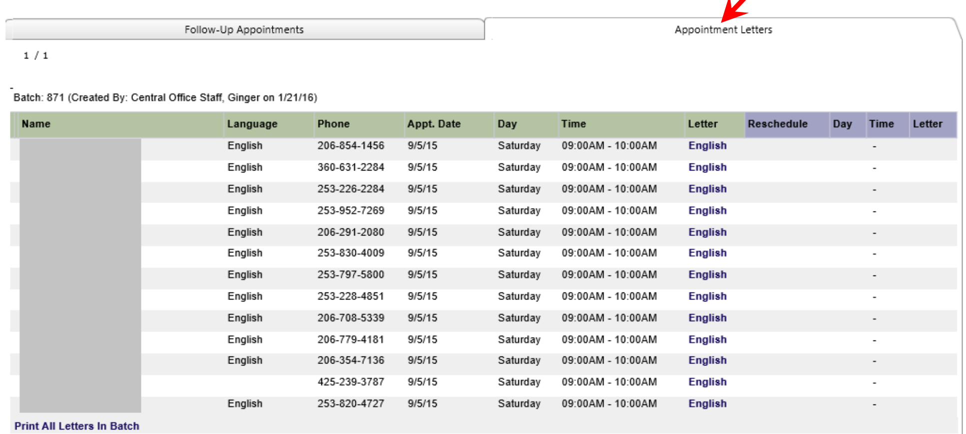
WorkSource
State of
Washington

Select the specific seekers to generate an appointment letter and for each, select Generate Letter. Then Save. Nothing needs to be selected for the other seekers in the column on the left.

Note: If **all seekers** have been scheduled, to generate letters for **all the seekers**, use the **All** tab. Select the All tab, then **Generate Letter.** This will create a letter for all the seekers in the list on the left.



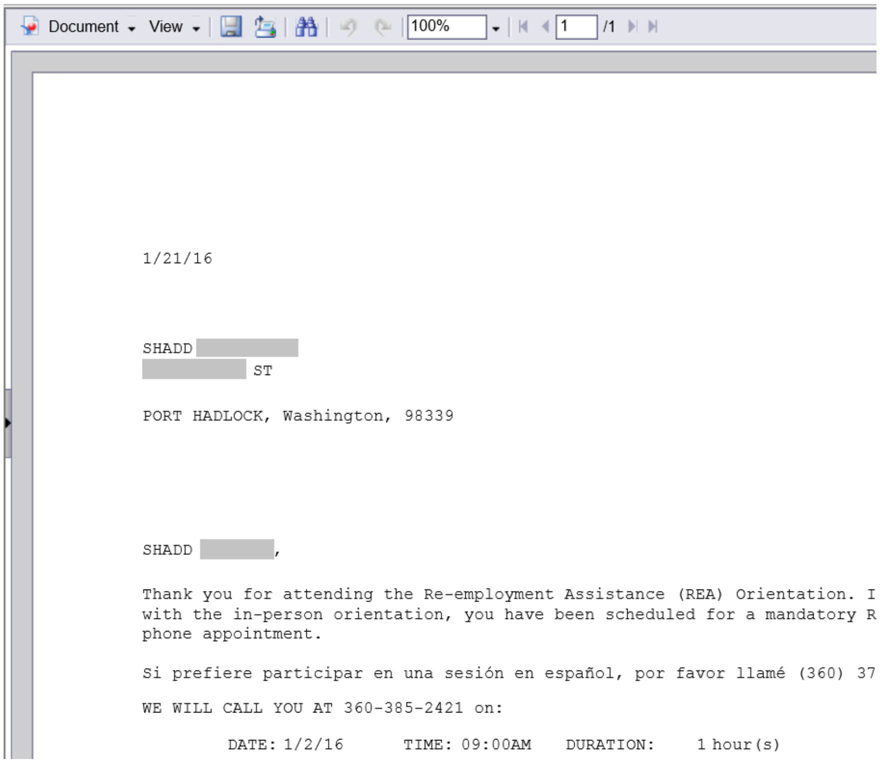
Once saved, user is redirected to the dashboard for the list. On the View Appointment Information and Letters dashboard part, select the **Appointment Letters** tab. Find the batch of letters just created and select the link to open the appointment letters for the group of clients selected.



Name	Language	Phone	Appt. Date	Day	Time	Letter	Reschedule	Day	Time	Letter
	English	206-854-1456	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	360-631-2284	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	253-226-2284	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	253-952-7269	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	206-291-2080	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	253-830-4009	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	253-797-5800	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	253-228-4851	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	206-708-5339	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	206-779-4181	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	206-354-7136	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
		425-239-3787	9/5/15	Saturday	09:00AM - 10:00AM	English			-	
	English	253-820-4727	9/5/15	Saturday	09:00AM - 10:00AM	English			-	

Note: Select **Print All Letters In Batch** to open all the letters in a single PDF document. Or select individual letters through the link in the **Letter** column.

The letter opens in a new tab or window. Select the print icon to open or save the letter to your PC for printing.



1/21/16

SHADD [redacted]
[redacted] ST

PORT HADLOCK, Washington, 98339

SHADD [redacted],

Thank you for attending the Re-employment Assistance (REA) Orientation. I
with the in-person orientation, you have been scheduled for a mandatory R
phone appointment.

Si prefiere participar en una sesión en español, por favor llamé (360) 37

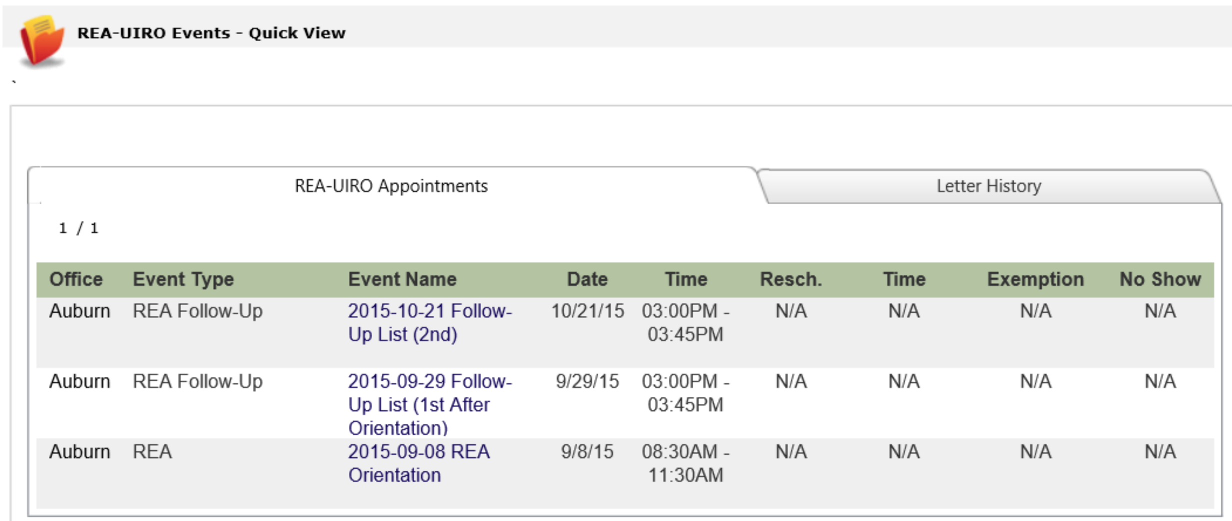
WE WILL CALL YOU AT 360-385-2421 on:

DATE: 1/2/16 TIME: 09:00AM DURATION: 1 hour(s)

Rescheduling a Seeker’s Follow-Up Appointment

Rescheduling a Follow-Up Appointment is very similar to rescheduling an initial appointment. The main difference is the user will be accessing the REA Follow-Up lists to do the reschedule instead of a specific event.

Access the seeker’s dashboard. On the REA-UIRO Events dashboard part, determine which list has the follow-up appointment based on the original appointment date that needs to be rescheduled. Click the **Event Name** to navigate to the list that has the appointment.

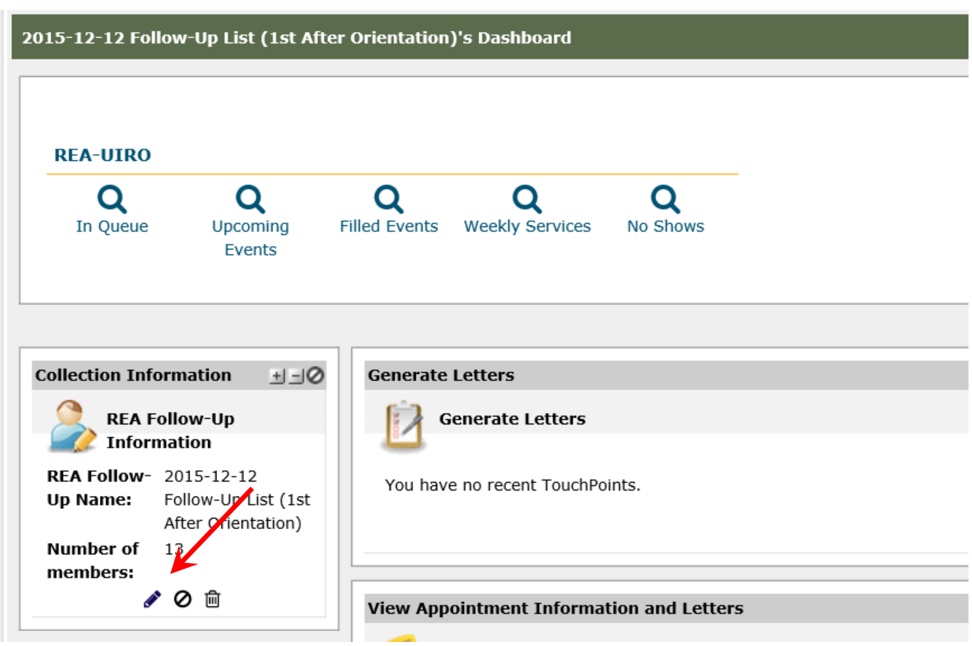

REA-UIRO Events - Quick View

REA-UIRO Appointments | Letter History

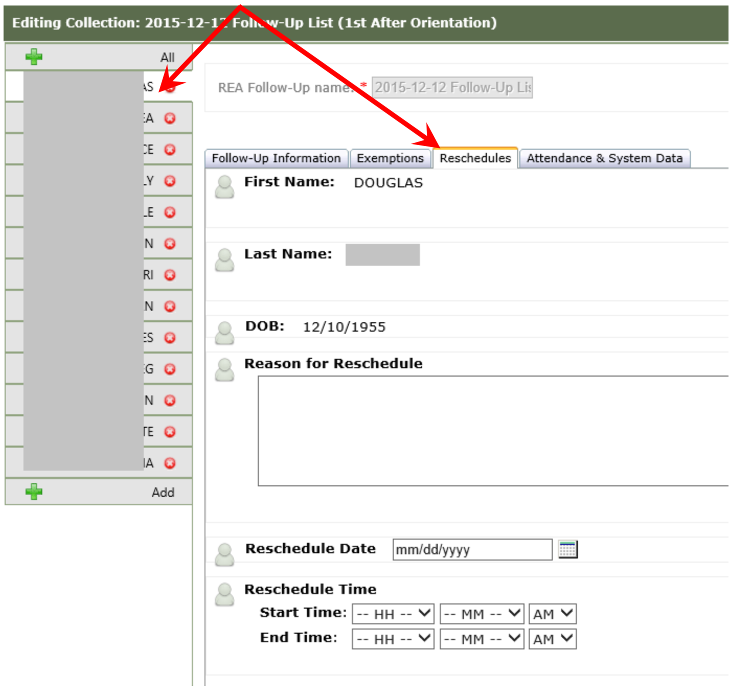
1 / 1

Office	Event Type	Event Name	Date	Time	Resch.	Time	Exemption	No Show
Auburn	REA Follow-Up	2015-10-21 Follow-Up List (2nd)	10/21/15	03:00PM - 03:45PM	N/A	N/A	N/A	N/A
Auburn	REA Follow-Up	2015-09-29 Follow-Up List (1st After Orientation)	9/29/15	03:00PM - 03:45PM	N/A	N/A	N/A	N/A
Auburn	REA	2015-09-08 REA Orientation	9/8/15	08:30AM - 11:30AM	N/A	N/A	N/A	N/A

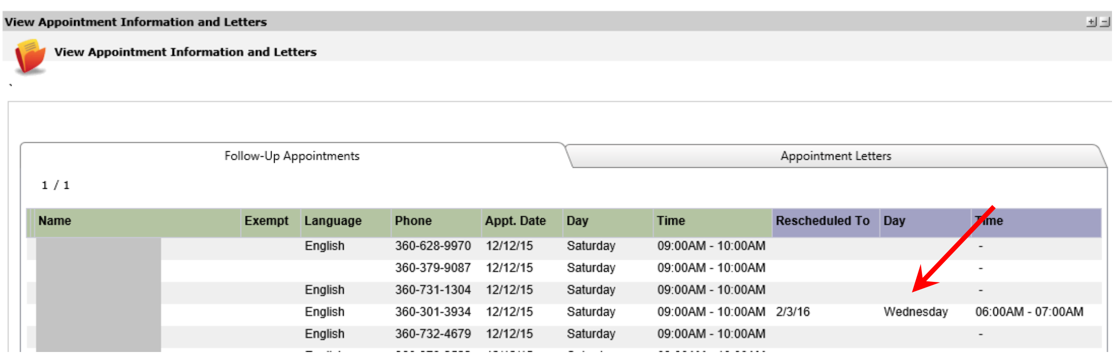
User is directed to the dashboard for the list. Select the pencil icon in the Collection Information dashboard part to open the list details.



Select the seeker and then the Reschedules tab. Enter a Reason for Reschedule, Reschedule Date, and Reschedule Time. Save.

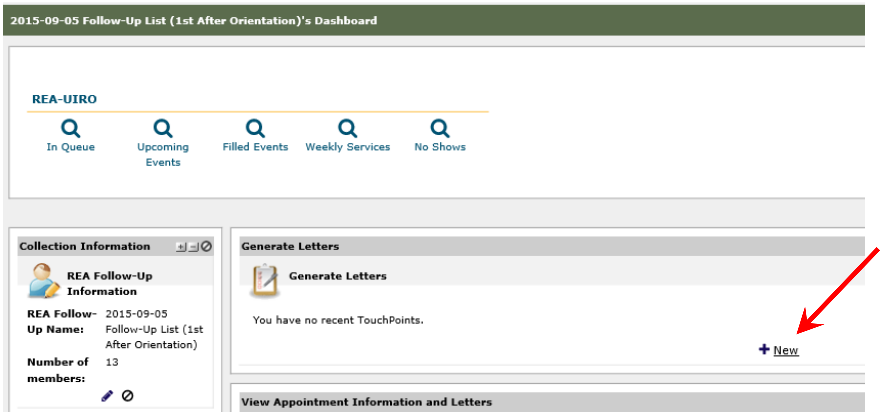


User is redirected to the dashboard for the list. See that in the View Appointment Information and Letters Dashboard part, the rescheduled seeker now shows a reschedule date and time.

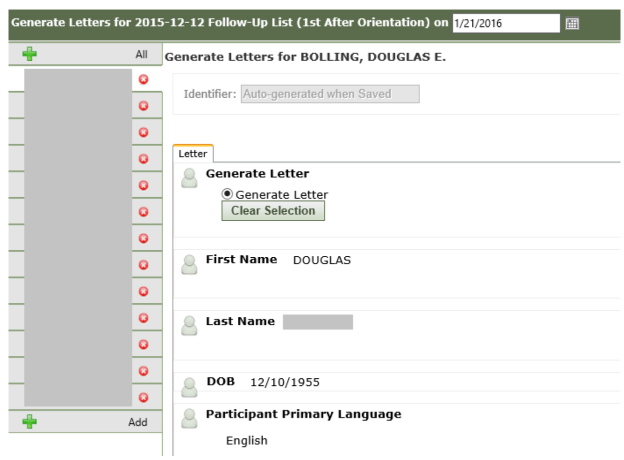


Generating a Letter for a Reschedule to a Follow-Up Appointment

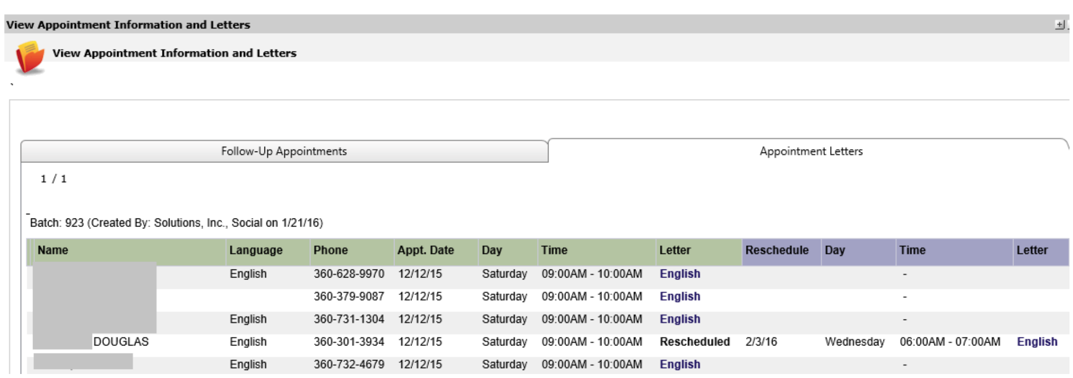
Once a rescheduled date and time for a follow-up appointment has been set, generate a new notification letter. From the Follow-Up list dashboard, select New in the Generate Letters dashboard part.



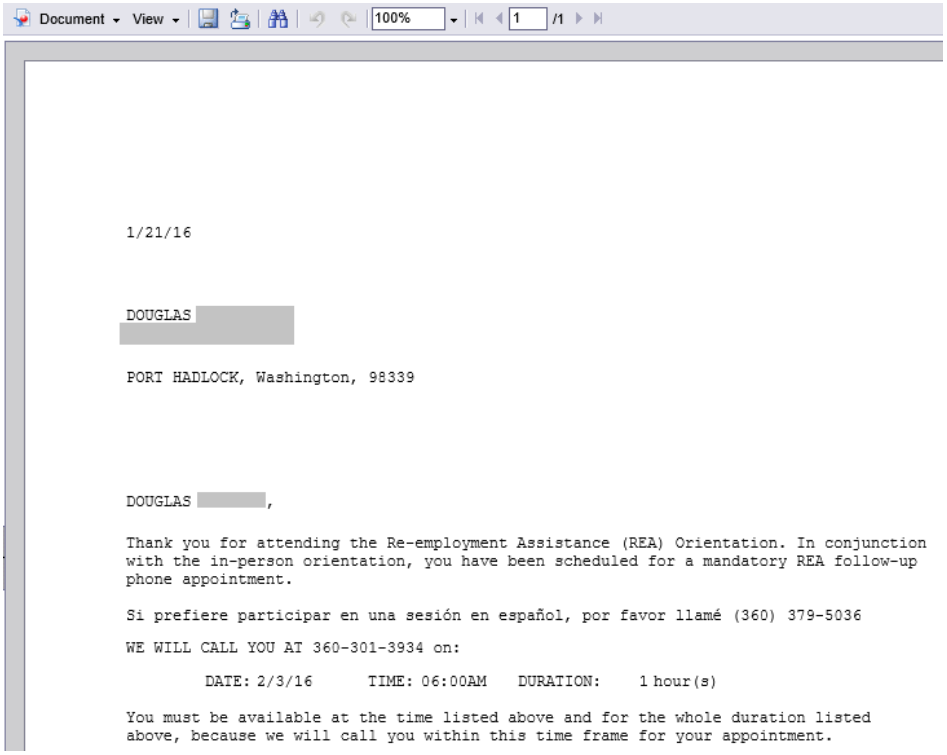
Select the seeker being rescheduled. Select Generate Letter. Save.



User is redirected to the dashboard for the list. On the View Appointment Information and Letters dashboard part, select the Appointment Letters tab. Find the batch of letters created for the list and select the link in the **Reschedule** column to open the appointment letters for the rescheduled seeker.



The letter opens in a new tab or window. Select the print icon to open or save the letter to your PC for printing.


Document View 100% 1 /1

1/21/16

DOUGLAS [redacted]

PORT HADLOCK, Washington, 98339

DOUGLAS [redacted],

Thank you for attending the Re-employment Assistance (REA) Orientation. In conjunction with the in-person orientation, you have been scheduled for a mandatory REA follow-up phone appointment.

Si prefiere participar en una sesión en español, por favor llamé (360) 379-5036

WE WILL CALL YOU AT 360-301-3934 on:

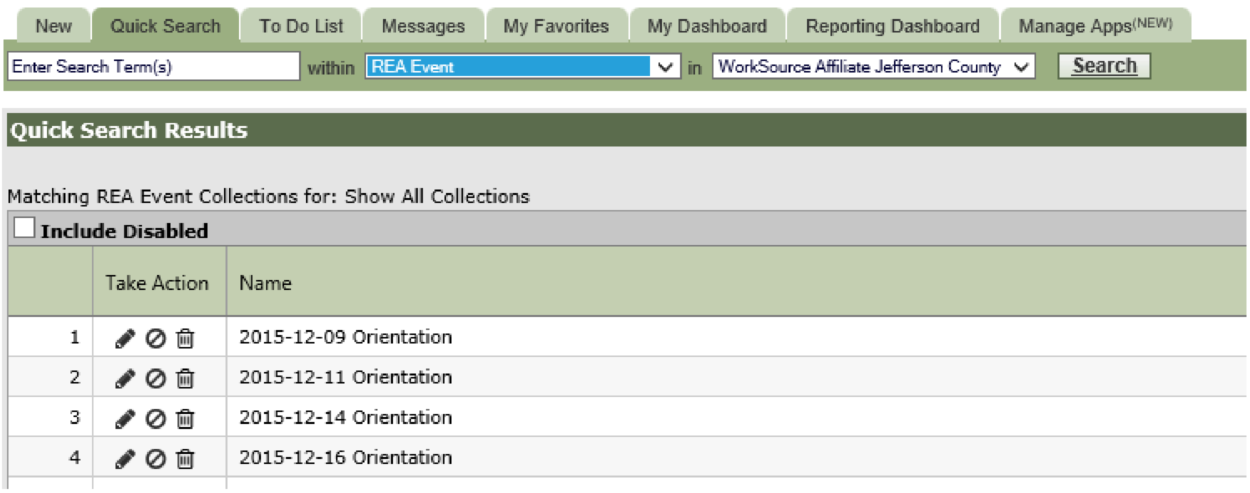
DATE: 2/3/16 TIME: 06:00AM DURATION: 1 hour(s)

You must be available at the time listed above and for the whole duration listed above, because we will call you within this time frame for your appointment.

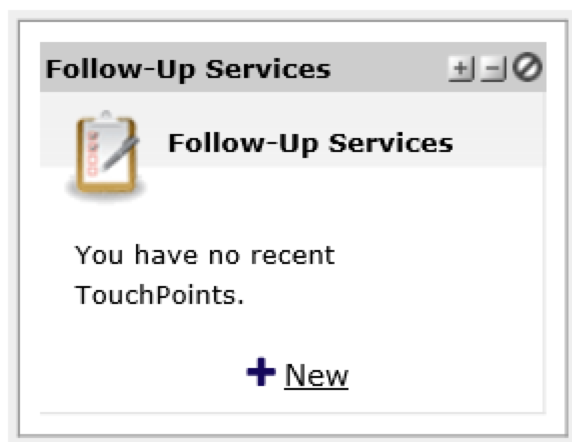
Recording Services Delivered to Seekers

Recording services for events or follow-up appointments can either be done directly on a single seeker's dashboard or on the event or list's dashboard to record services for multiple seekers at one time

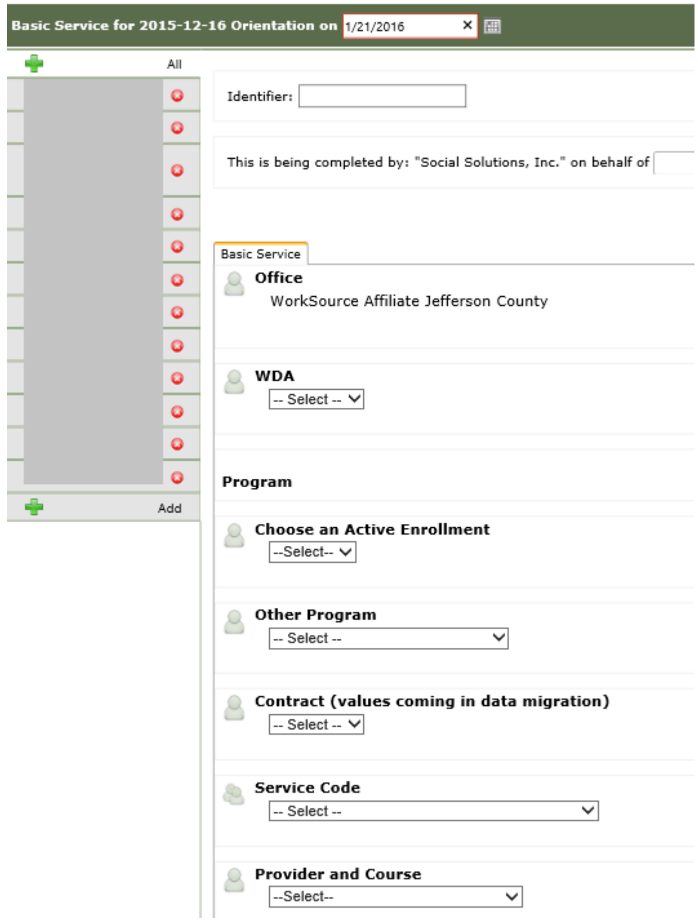
Record Services for an Event – multiple seekers
Set the Quick Search 'within' to the desired type of event or list and select Search. 'Enter Search Term(s)' can be left blank, or partial criteria entered to narrow search.



From the search results, select the name of the event or list. User is directed to the dashboard for the chosen event. In the Event Services or Follow-Up Services dashboard part (depending on the type of service being recorded), select New.



On the next screen, select the red x icon () **to remove a client from the list**. This represents a person that **was scheduled to attend the event but did not attend** (and so a service should not be recorded for that person.)



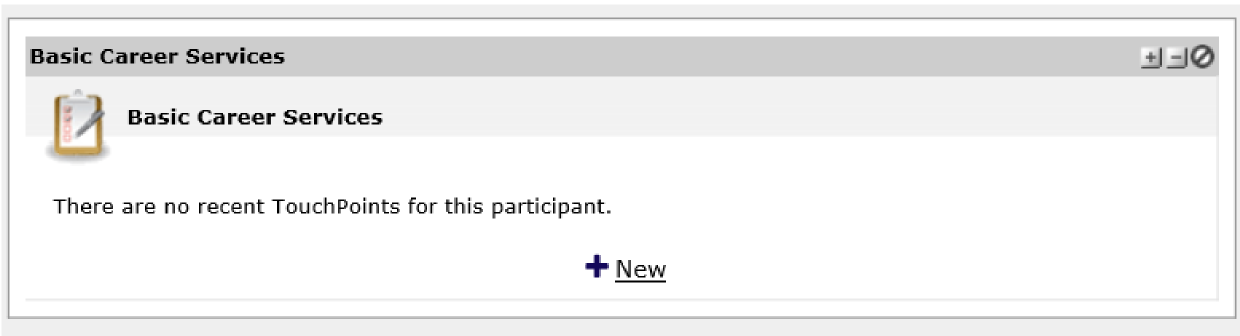
Fill out the basic service page, at a minimum entering the **Activity Date** and **Service Code**. Save. The **Activity Date** is used by the system to automatically mark whether a client is a **No Show** for a particular event.

Select ALL to populate responses for all seekers in the list. Select an individual name to change the response for any questions with a one-head icon. (Reference recording a multiple participant touchpoint in the End User Staff guide for more details.)

Recording a Service on an individual Seeker's Dashboard

A service may be recorded directly on the seeker's record (rather than within the event record.)

Access a participant's dashboard. Locate the Basic Career Services dashboard part. Select New.



Complete the Basic Service screen elements for the seeker, as noted above in this lesson, entering the Service Code and Activity Date.

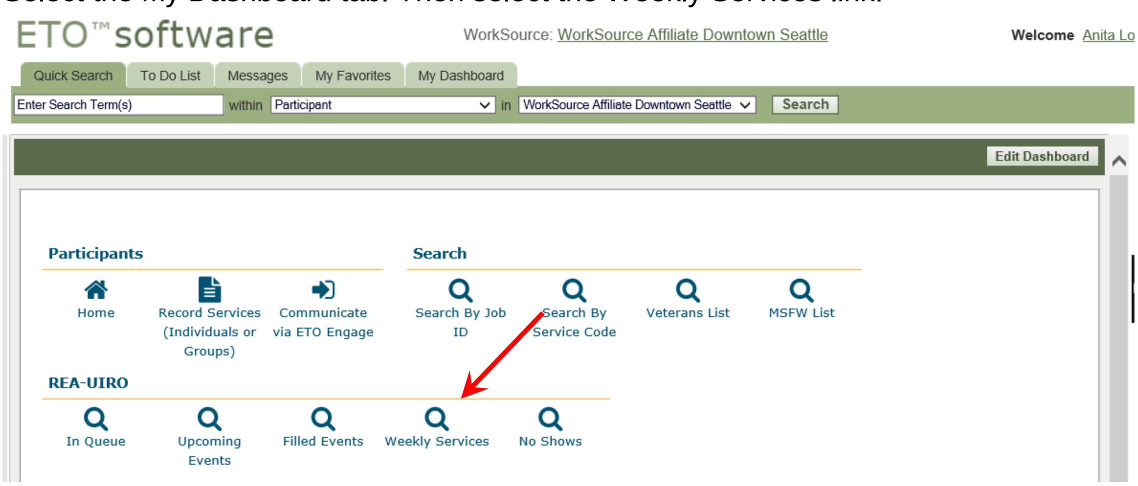
Reviewing Weekly Events with Services Recorded

Each Saturday, the system will review all of the events and appointments that were set to take place the week prior (i.e. If today is Saturday February 13th, the system will review events and lists where the event date or appointment date is between Sunday February 7th and Saturday February 13th.) **If the system finds that a service related to the event was not recorded within that timeframe, the seeker will be marked as a No Show and sent to the unemployment claimant system as such**.

All services must be recorded for a given week **before 5:00pm PST on a given Friday** if the service is to be seen by the system when determining No Shows.

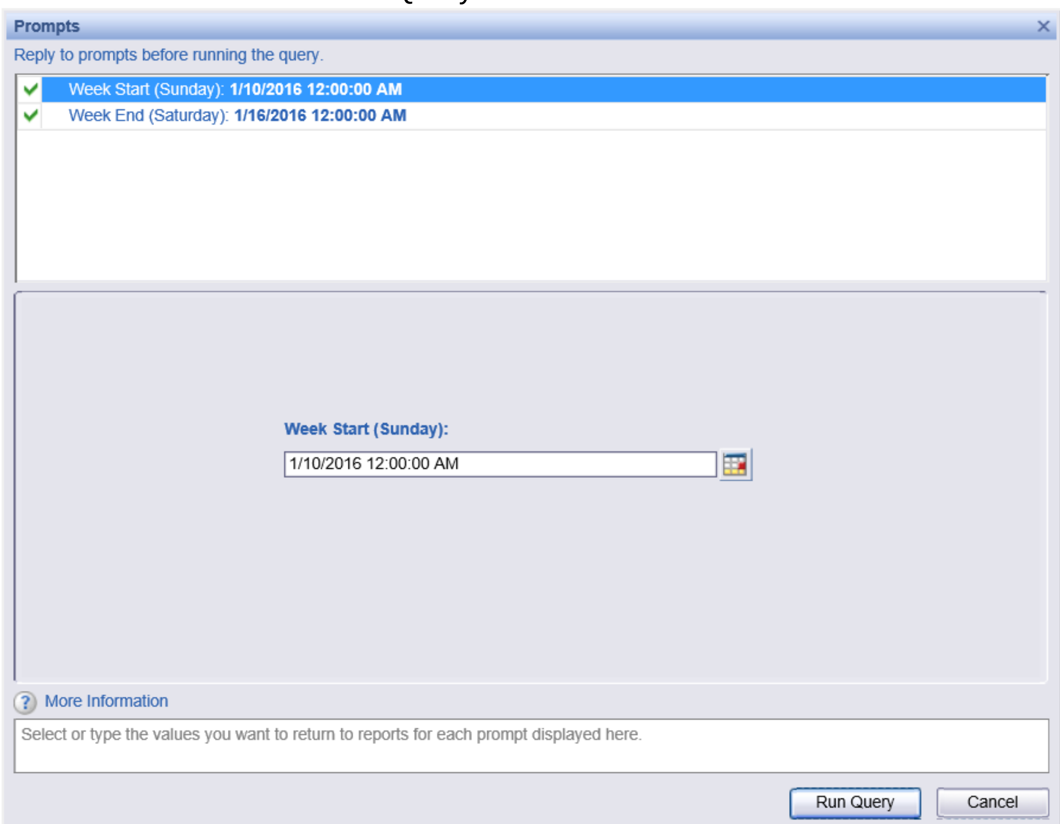
To assist with making sure that services are recorded appropriately for seekers that did attend their scheduled event or appointment, use the **Weekly Services** view.

Select the My Dashboard tab. Then select the Weekly Services link.

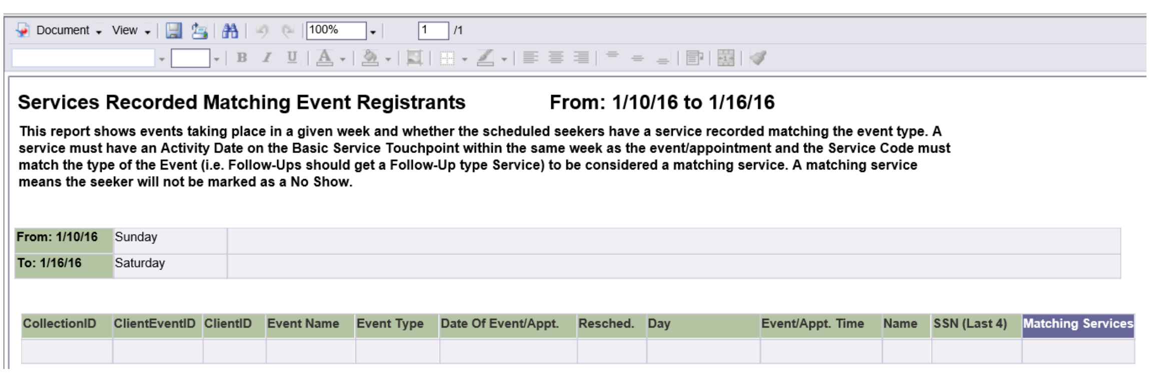


A new screen will open either as a new window or separate tab in your browser. A 'Prompts' box will appear with options for entering dates for 'Week Start (Sunday):' and 'Week End (Saturday):' This date range defines a period of time to see events and the services recorded for clients that were supposed to attend events within that timeframe.

Click "Week Start" to highlight it. Use the Calendar Icon to select a Sunday. Repeat for the "Week End." Then select Run Query.



View the list of clients that were supposed to attend an event within the date range and what services they received in that timeframe. In the matching services column, a 0 means that no service was recorded matching the type of event. A 1 or higher means that 1 or more services were recorded.



Services Recorded Matching Event Registrants **From: 1/10/16 to 1/16/16**

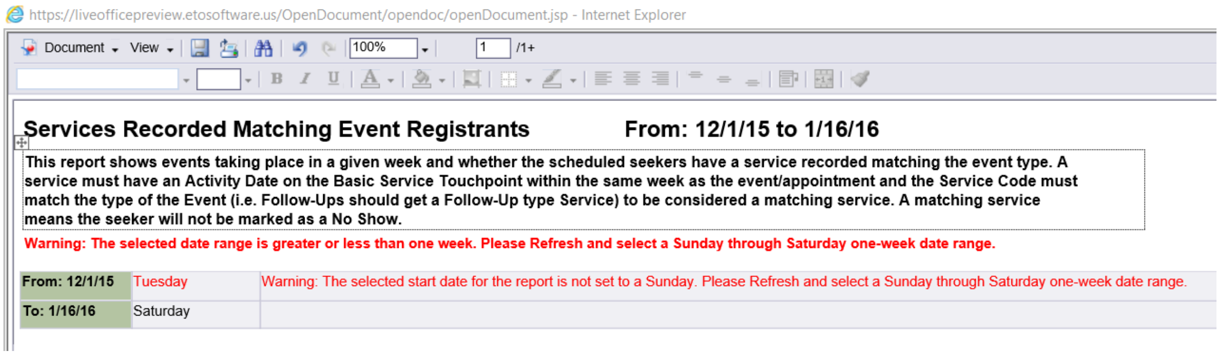
This report shows events taking place in a given week and whether the scheduled seekers have a service recorded matching the event type. A service must have an Activity Date on the Basic Service Touchpoint within the same week as the event/appointment and the Service Code must match the type of the Event (i.e. Follow-Ups should get a Follow-Up type Service) to be considered a matching service. A matching service means the seeker will not be marked as a No Show.

From: 1/10/16	Sunday	
To: 1/16/16	Saturday	

CollectionID	ClientEventID	ClientID	Event Name	Event Type	Date Of Event/Appt.	Resched.	Day	Event/Appt. Time	Name	SSN (Last 4)	Matching Services

March 2016

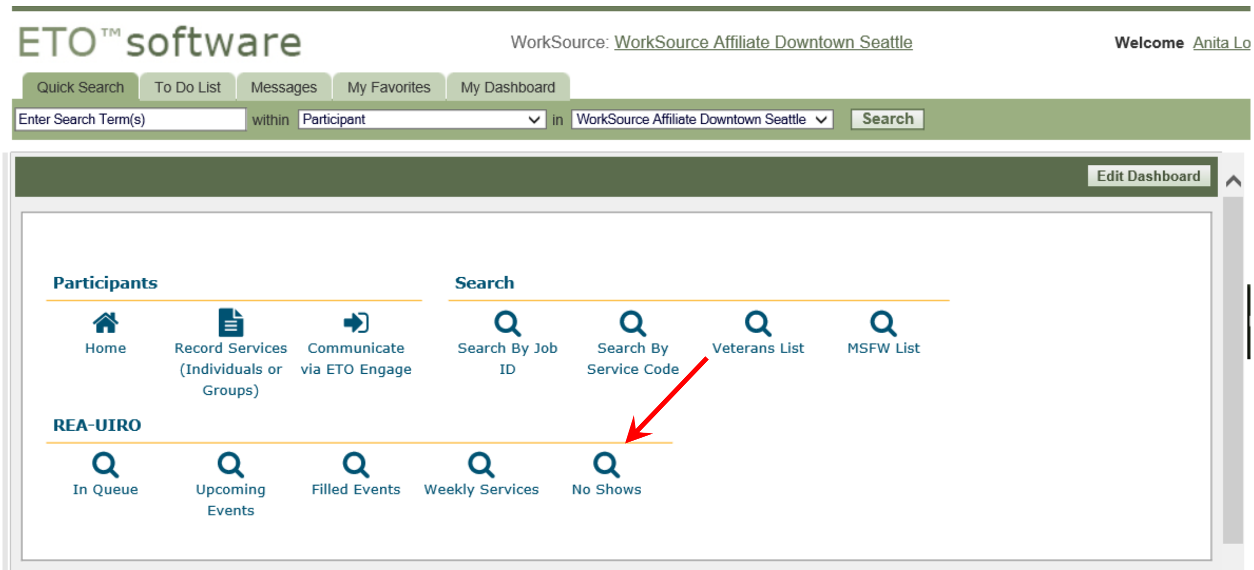
Note: It is technically possible to use a wider than one-week date range. A warning will display as this date range may not give the results expected.



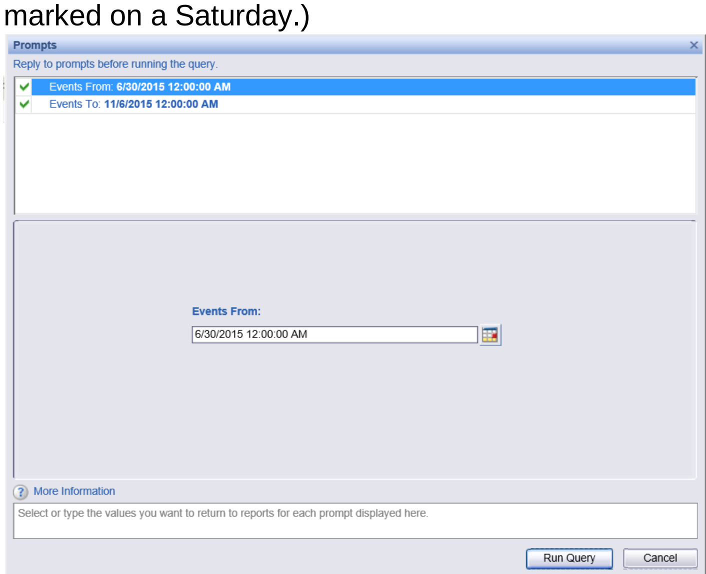
Reviewing the No Show List

After the No Show list has been generated on a given Saturday, an appointment for a seeker that did not attend will be automatically marked as a No Show. This mark will appear within the event or list on the **Attendance and System Data** tab. This information is always view only and cannot be changed.

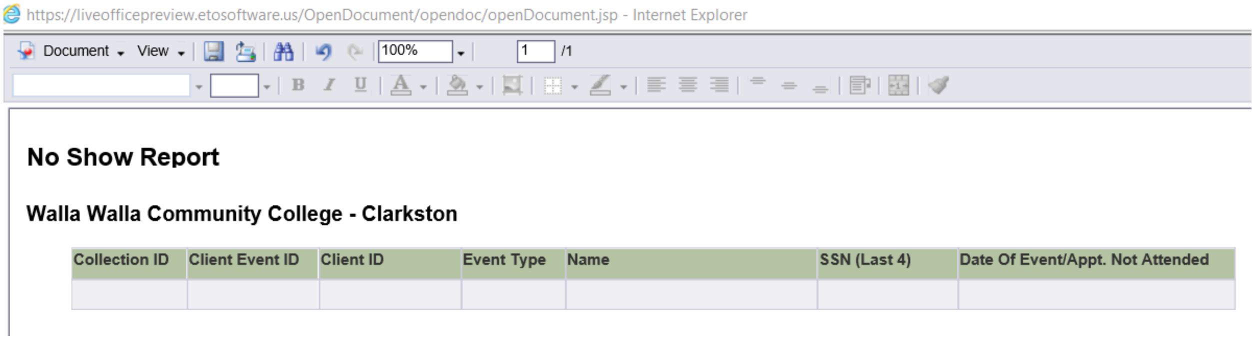
To view all the seekers that were marked as no show, select use the **No Shows** option on the **My Dashboard** screen.



A new screen will open either as a new window or separate tab in your browser. A 'Prompts' box will appear with options for entering dates for 'Events From:' and 'Events To:'. Any date range may be used. However, it is recommended to set the 'Events To:' date to a Sunday to see the No Shows marked before that date (since the most recent No Shows will always have been marked on a Saturday.)



Sample without any results (i.e. no shows tagged)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No Show Report

Walla Walla Community College - Clarkston

Collection ID	Client Event ID	Client ID	Event Type	Name	SSN (Last 4)	Date Of Event/Appt. Not Attended

WorkSource

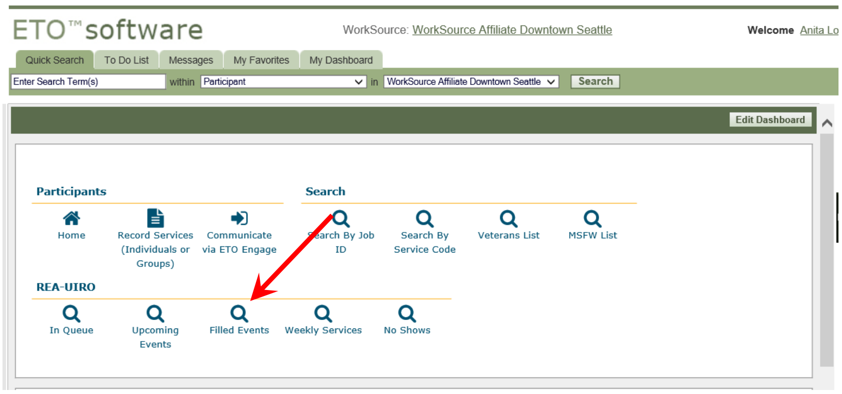
State of
Washington

Review and Print List of Scheduled Seekers for Events

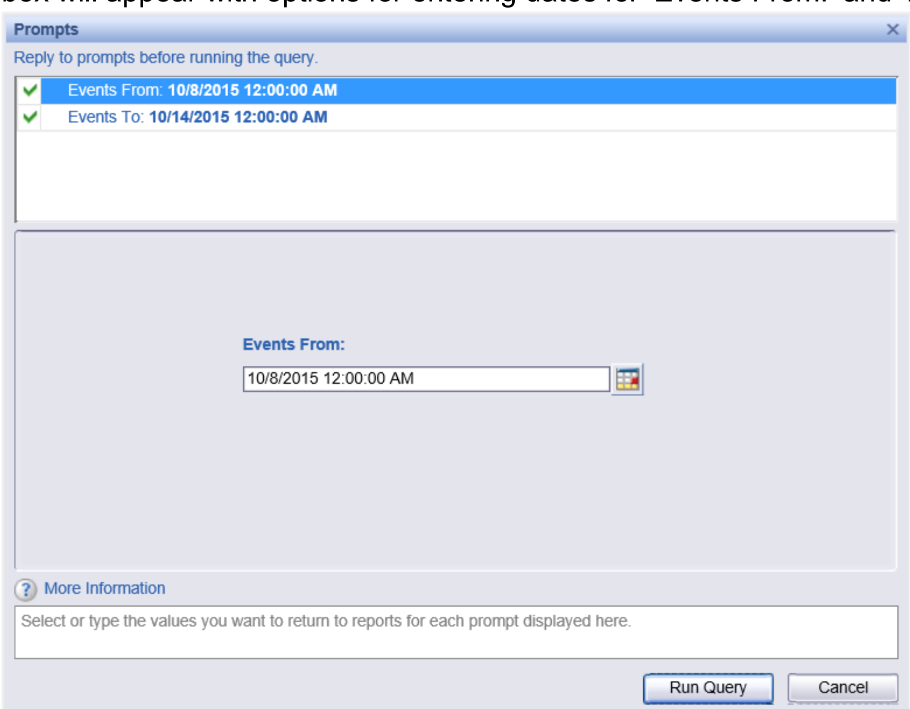
A list of events and seekers registered for those events can be exported to MS Excel. Attendance can be recorded in MS Excel or on a printed attendance sheet customized for your office.

Exporting Scheduled Seekers

From My Dashboard, select **Filled Events**.

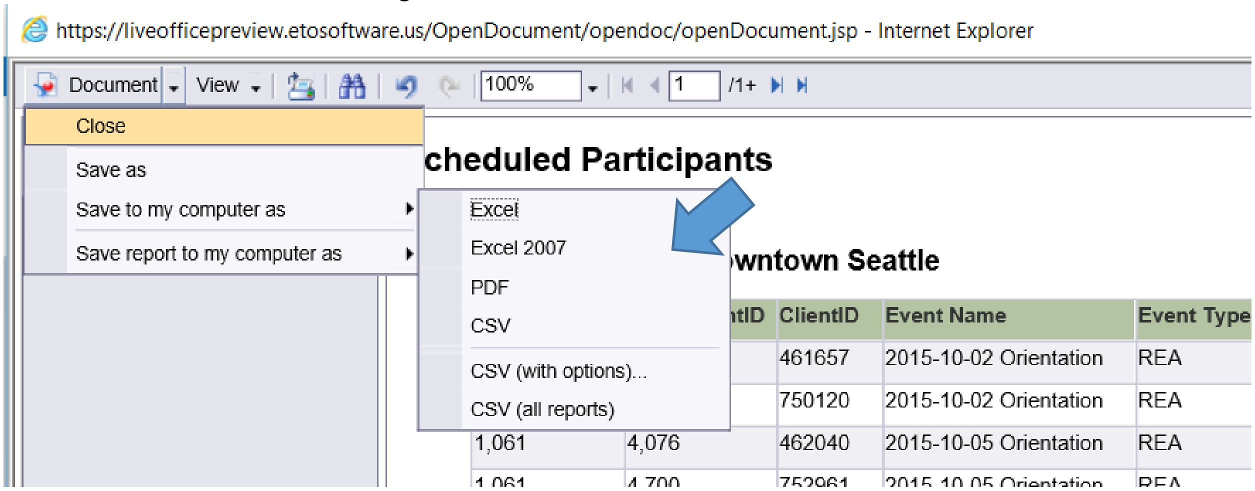


A new screen will open either as a new window or separate tab in your browser. A ‘Prompts’ box will appear with options for entering dates for ‘Events From:’ and ‘Events To:’.



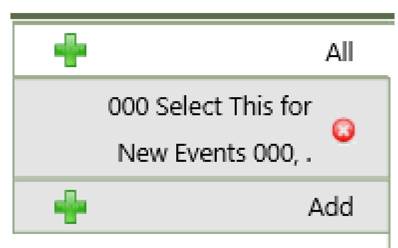
Enter prompts and select Run Query.

A new tab or window will open with a list of events. Select ‘Document’, then ‘Save to My Computer as’ ‘Excel’. When prompted to Open or Save, select Open. MS Excel will open with a table of events and seekers registered for those events.



Note: If appointment is marked as a no show, the seeker **cannot** be rescheduled from that event. Seeker must be manually added to an upcoming event by 5pm on a Friday before the event fills.

Search for the event and access the event’s dashboard. In the Event Information part, click the pencil to edit. Click the + plus sign to add a seeker to the event. Search for and then select a name, and Save.



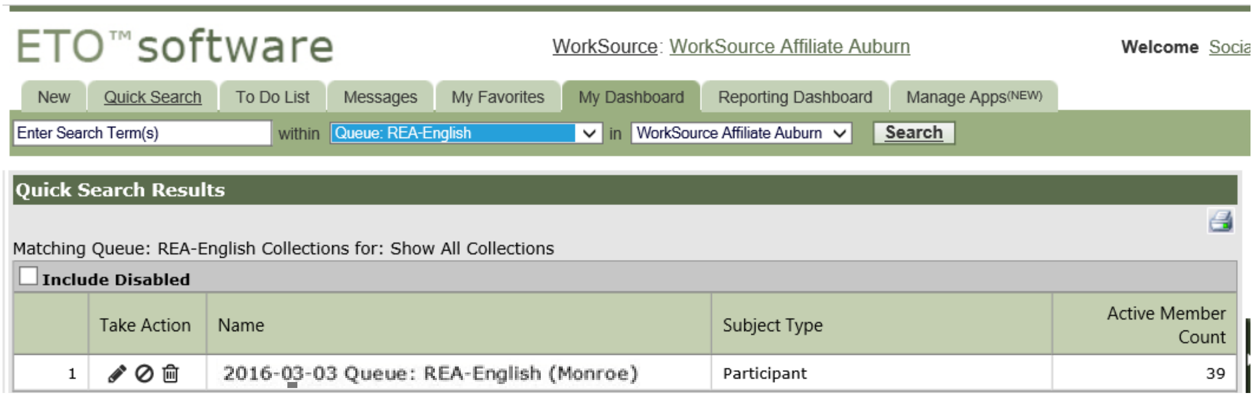
Review Current Scheduling Queues

Each weekend, several imports from other systems populate sets of seekers that can be scheduled into an event. On Mondays, an automated process fills in available events (i.e. those in a 7-11 day window with capacity available.) It is possible that not all seekers were able to be scheduled because of lack of capacity in the scheduled events. For example, an office may have 50 seekers added to their “queue” on the weekend. The automated scheduling process might find space for 40 seekers in events within a 7 to 11 day window from that Monday. That will leave 10 seekers in the “queue”. These seekers will have first priority to be scheduled the following weekend.

To see how many seekers are currently in your office’s queue, conduct a **Quick Search for the Queue.**

Set the Quick Search ‘within’ option to one of the following:

Queue: REA-English	Shows a list of seekers that were **added into the office for potential scheduling in an REA event** where their primary language is anything **other than Spanish** Note: This item is for viewing only. No user actions will need to be taken on this item.
Queue: REA-Spanish	Shows a list of seekers that were **imported into the office for potential scheduling in an REA event** where their primary language is **Spanish** Note: Only offices that regularly provide events in Spanish will utilize this list. This item is for viewing only. No user actions will need to be taken on this item.
Queue: UIRO/REA-Lite – English	Shows a list of seekers that were **added into the office for potential scheduling in an UIRO/REA-Lite event** where their primary language is anything **other than Spanish** Note: This item is for viewing only. No user actions will need to be taken on this item.
Queue: Queue: UIRO/REA-Lite – Spanish	Shows a list of seekers that were **added into the office for potential scheduling in an UIRO/REA-Lite event** where their primary language is **Spanish** Note: Only offices that regularly provide events in Spanish will utilize this list. This item is for viewing only. No user actions will need to be taken on this item.

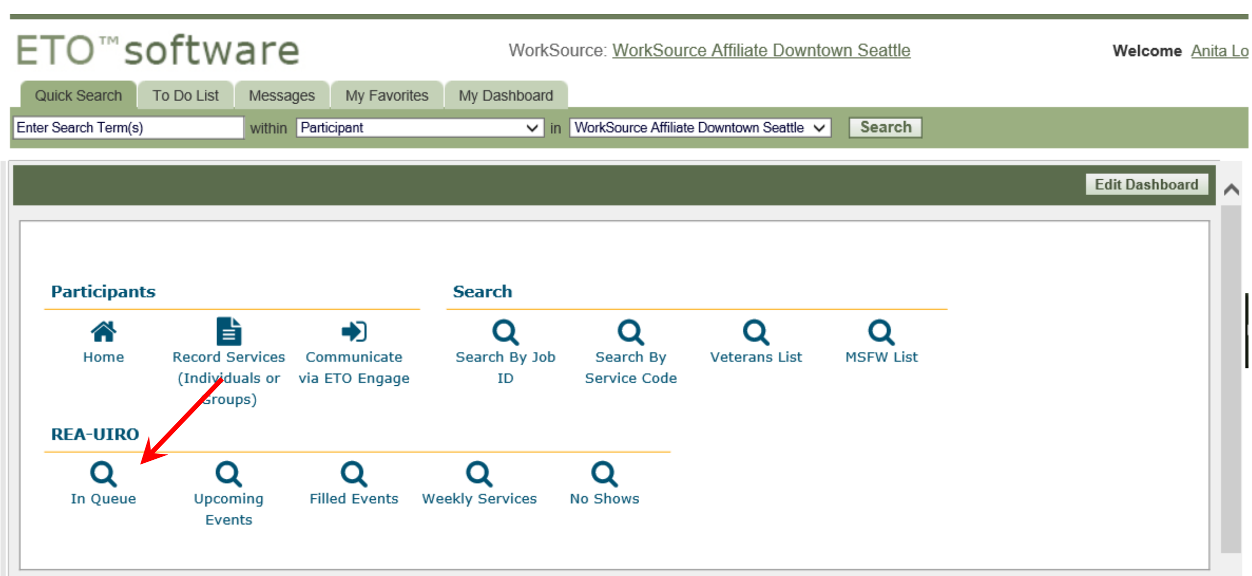


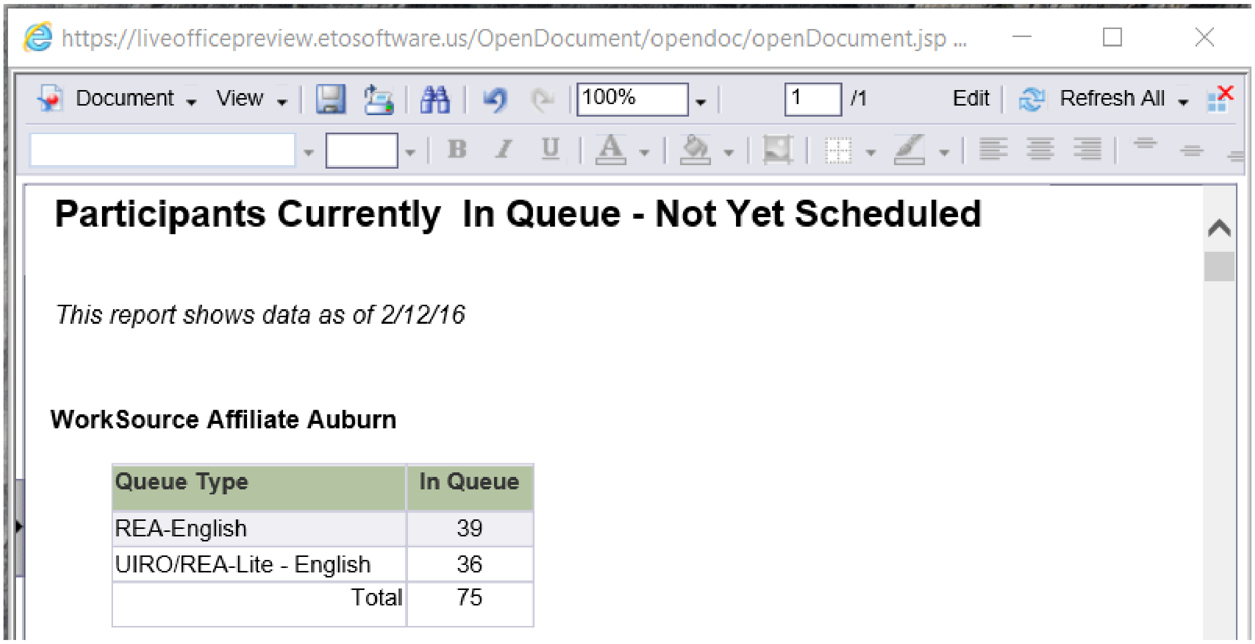
The Active Member Count represents the number of seekers that are currently in the (i.e. not yet scheduled.)

Scheduling Queues cannot be manually edited. The edit feature (pencil) allows users to view the details in the Scheduling Queues. Users should not attempt to add seekers to the queue. Adding a seeker to the queue will not result in that seeker being scheduled.

View the In Queue Report

This option will show all Queues in one screen. From the My Dashboard screen, select the **In Queue** option. Users with access to multiple offices will see figures for each office they have access to.





Participants Currently In Queue - Not Yet Scheduled

This report shows data as of 2/12/16

WorkSource Affiliate Auburn

Queue Type	In Queue
REA-English	39
UIRO/REA-Lite - English	36
Total	75

Hands On Activity – Mass Scheduling

1. **Create an event**. Set the date of the event to be within 7-11 of the Monday following the current date.
   a. Search for the event created in step 1. Note there are no seekers assigned to the event.

2. **Edit your event (prior to being filled)**
   a. Change the time of the event and Save.
   b. Note: If the event to be edited has a date within a 7-11 day window from the following Monday you must edit the event prior to 5pm the Friday before the following Monday.

3. **View Upcoming Events** by using the Upcoming Events link in My Dashboard.
   a. Event created in step 1 should be listed along with other events already created.

4. **Hide an event that has passed.**

Normally, over the weekend the events are filled. Use an event created the previous week for the purpose of the remaining exercises and assume the initial letters have now been generated.

5. **Search for an event created in previous weeks**.
   a. Initial letters would now be generated … for the purpose of practice, use an event created in previous weeks and assume the initial letters had been generated.

6. **View a seeker's past and future appointment.** Your seeker calls and has forgotten the date and time of his appointment.
   (Note: Normally, you would know the name of a seeker that you are working with. For the purpose of the following exercises you will need to identify a seeker that has been placed in an event. Search for the event (use either the one you created and was filled over the weekend, or use a previously created event.) From the list of search results, click on the name of the event. Seekers placed in the event will be on the left of the dashboard in the part titled "Scheduled Seekers." Identify the one you want to work with and click on the seeker's name.)
   a. From the seeker's dashboard, locate and view the seeker's past and future appointments.

7. **Reschedule a seeker's first appointment.** You seeker is ill and cannot make his appointment and asks to have it rescheduled.
   a. Go to seeker's dashboard, find the event, then edit event to change the date and time of the appointment for your seeker.
   b. Generate a letter for the rescheduled appointment.
   c. Print the new letter for your seeker.

8. **Exempt a seeker from an event**. A different seeker calls and you determine the seeker is eligible to be exempted from the event.
   (You may need to identify another seeker, see note in step 6.)
   a. Create an exemption for your seeker.

9. **Setup a Follow-up appointment for your seeker**.
   a. Find a follow list, then edit to set the date and time of the appointment for your seeker.
   b. Generate a letter for the follow-up appointment.
   c. Print the letter for your seeker.

10. **Reschedule an appointment for your seeker.**
    a. Find a follow list, then edit to change the date and time of the appointment for your seeker.
    b. Generate a letter for the rescheduled follow-up appointment.
    c. Print the letter for your seeker.

11. **Record Services**. Select an event in the past, and record services delivered for all participants in the event.