SUPERVISOR’S HOW TO GUIDE

*****

USING THE WORKFIRST DESK MANUAL and LESSON PLANS

- ☐ Review the JAS/eJAS/JFS process and request access for new WorkFirst staff (see Tips and Tools).
- ☐ Review Lesson Plans procedure with staff. (We recommend that you read the required materials prior to assigning them to your new staff.)
- ☐ Assist staff with setting up desktop icons/links for the:
  - WorkFirst Desk Manual
  - WorkFirst HandBook
  - WorkFirst Standards,
  - WorkFirst Support Services Directory
  - Internal Controls Manual.http://www.wa.gov/esd/workfirst/InternalControlsManual.pdf
- ☐ Direct staff to read the required materials for Lesson #1.
- ☐ Set an appointment with staff to review each Lesson, discuss “Key Points”, answer questions about the material, and assign the next Lessons.
- ☐ For Lesson #4, direct staff to read the required materials. Follow-up the completed reading assignment with “shadowing” time with an experienced WorkFirst staff (some hands-on work with vouchers and batches).
- ☐ Set an appointment to review Lesson #4 “Key Points”, and answer questions about the material.
- ☐ After all the materials have been reviewed, please finalize the completion form and submit to WorkFirst Administration Unit, Attention Shelley Warnock.

The goal of this training protocol is to provide enough information and direction to allow a new staff person to perform basic WorkFirst activities with moderate supervision at the completion of the four lessons. Additional coaching, shadowing and monitoring will be necessary as part of day-to-day interactions to achieve a complete working level competency.

WorkFirst Desk Manual Training Completion Form

1 –WorkFirst Program Overview

- ☐ Section 1-How to use the WorkFirst Desk Manual
- ☐ Section 2-History and overview

2 –Expectations

- ☐ Section 3-Orientation and assessment

3-Program Activities & Deliverables

- ☐ Section 4-Job preparation/job search
- ☐ Section 5-Full time, part time, and temporary employment
- ☐ Section 6-Post employment

4-Caseload Management & Quality Assurance

- ☐ Section 7-Manage your caseload
- ☐ Section 8-Internal Controls (voucher & batches)
- ☐ Section 9-Using Automated Systems
- ☐ Section 10 On the Job training
- ☐ Section 11 Work experience
- ☐ Section 12-Working with parents with conviction histories

Start date of Training:	Completed date of Training:
WDA:	Office Name/Org Index:
Name of Counselor:	Supervisors Name:
Signature of Counselor (upon completed training)	Signature of Supervisor (upon providing the training)

COPIES:

- ☐ ECDD-Shelley Warnock
- ☐ Personnel File-local office
- ☐ Beverly Peterson
- ☐ course number 01-14-E159

SUPERVISOR'S LESSON PLAN #1

Introduction/History/Overview

Learning Objectives:

- List the WorkFirst partners and the program's goals
- Describe local and state WorkFirst resources
- Describe techniques to effectively communicate with partners, community organizations, and participants

Background:

WorkFirst is Washington's welfare reform program is designed to helps participants get what they need to prepare for and go to work. It is a partnership between state agencies and communities to work together to provide the necessary services and resources families need to be successful. Across the state hundreds of local organizations and business partners are actively involved, they may include tribal governments, Workforce Development Councils, community action agencies, non-profit agencies of all types, schools, labor organizations, and childcare, transportation, mental health and substance abuse treatment providers.

Required Materials:

- WorkFirst Desk Manual, Sections 1 and 2
- Copy of local office Community Resources customer handout
- WorkFirst Handbook: http://www.dshs.wa.gov/ESA/wfhand/default.htm Welcome to the WorkFirst Handbook (Introduction) and Sections 3.1 (Overview) http://www.dshs.wa.gov/ESA/wfhand/3_1.htm

Key Points:

- Who are the WorkFirst Partners?
    - DSHS, ESD, SBCTC, Commerce, DEL, OFM
- Good communication skills are good engagement skills. Discuss some examples:
    - Paraphrase and summarize
    - Open-ended and closed questions;
    - Make the conversation engaging! Ask: "How would it feel to pay all your bills?"
- What makes a good listener?
    - Listen with an open mind.
    - Give your full and undivided attention.
    - Focus on the content.
    - Listen for big ideas, hidden meaning, and feelings.

- Ask questions for clarification.
- Make eye contact.
- Encourage the speaker by nodding or saying, “I see.”
- Pay attention to nonverbal clues (body language).
- Monitor your own nonverbal signals.

- Objective documentation helps you remember, record unusual situations and record behavior.
  - Discuss how to write objective notes:
    - Clearly and briefly – focused and to the point
    - Concisely - include only necessary information
    - Accurately and completely – check your facts
    - Timely – record them as soon as they occur
    - Readable (grammar, punctuation, spelling, no acronyms)

Remember: If you didn’t write it down, it didn’t happen.

- All individual information is confidential under state and federal law.
  - Access the information or discuss the records only when necessary to do your job.
  - When you have a situation with a participant that involves chemical dependency, family violence, mental health or HIV/AIDS and STD, ask the participant if you have their consent to discuss this with the DSHS case manager in order to get them connected with the right resources.

- Do you know what community resources and programs are available in this area and how to make referrals?

  - Statewide WorkFirst resources and programs
  - WorkSource resources and programs
  - Local partnership resources
  - Local community agency resources

SUPERVISOR'S LESSON PLAN #2

ORIENTATION/ASSESSMENT

Learning Objectives:

- Deliver the WorkFirst Orientation
- Determine if the participant is ready for Job Search (JS) using work skills assessments
- Record the SKIES Initial Assessment
- Refer Backs (RB)
- Describe Support Services

Background:

The WorkFirst Orientation provides participants information about ESD services and the WorkFirst program. It can be in a group or one-on-one. Strive to make your orientation as welcoming and engaging as possible.

Your office may present the orientation as a PowerPoint, show the WorkFirst daily Activity & Job Search Log DVD, or give written information as handouts and flyers. In compliance with the Governor's Executive Order, use plain language in your PowerPoint and all written materials to make them engaging and interesting.

A Work Skill Assessment (WSA) is the centerpiece to engage the participant in a conversation about interests, strengths, challenges, and the direction of his/her job search. Some offices complete the WSA during the WorkFirst Orientation. Then, complete an Initial Assessment (IA) in SKIES using information received from the participant and gained from the WSA. You must complete the SKIES IA using the results of the Work Skill Assessment within ten business days after the participant is referred to job search.

Once a participant is actively engaged in Job Search (JS) activities, support services can be provided based on the real and immediate needs of the participant. The Support Services Directory lists the suggested use and dollar limits for each service.

Required Materials:

- WorkFirst Desk Manual, Section 3
- WorkFirst Standards Page 1-9
- WorkFirst Handbook Section 4.1 and Section 2, 2.
- WorkFirst Support Services Directory

Key Points:

What are the minimum requirements to participate in job search?

- Have transportation to conduct Job Search and accept employment.
- Have daycare arranged prior to reporting to Job Search.
- Be able to start work within 4 weeks.
- Participate as outlined in the Individual Responsibility Plan.
- Participate, preferably at least 10 hours per week, but could be less, while engaged in another core activity to fulfill core activity requirements.

What strategies make Orientations engaging?

- See WorkFirst Desk Manual, Section 3

Why are there 2 sets of RB codes?

- Different codes are available depending on whether the RB is from the RI component or the JS component.

What is required before the SKIES Initial Assessment (IA) is completed?

- To meet our performance based contract commitment we must provide each WorkFirst participant a Work Skill Assessment (WSA). The WSA must be administered and interpreted for the participant prior to the completion and recording of their IA in SKIES.

How do we use Key Train as both assessment and training tool?

- Assessment: You must give WorkFirst participants with a High School Diploma, GED or less the KeyTrain Quick Guide Assessment within 5 business days of when they enter into Job Search.
- Training: KeyTrain fills a gap for many of our participant who are not able, eligible, or interested in formal education or vocational training, but who still could benefit from an assessment of their skills and skill development training modules.

Support services are not an entitlement. How do we decide whether or not to approve a support service?

1. Is the support service essential to move them towards employment or independence?
2. What resources can they quickly bring to the table?
3. How much do they need to reserve to cover their needs for the rest of the year?
4. What is readily available from their community?
5. Is there a lower cost alternative available?
6. How do they plan to take over ongoing costs in the future?

SUPERVISOR'S LESSON PLAN #3

JOB SEARCH PREPARATION/JOB SEARCH

Learning Objectives:

- Describe how to record data and find information in CATS
- Engages participant in job search (JS) preparation activities
- Complete and evaluate Activity Planners
- Screen Job Search Logs and verify job search activities
- Report Actual Hours
- Document entered employment
- List Post-employment services

Background:

Job preparation is the beginning of employment services and can last up to two weeks. Use this time to immediately engage participants in activities to help them stay involved and build the skills to move towards employment. Job preparation allows participants to assess their skills and acquire the basic skills they need to get into the right job. The orientation and assessments occur during the job preparation phase. Life skills and skills enhancement training also take place as part of job preparation.

Automated Systems: WorkFirst uses multiple automated systems to record data. The DSHS system ACES downloads customer demographics, the Individual Responsibility Plan (IRP) and component code(s) directly into CATS/eJAS when an initial referral (RI) is made to Job Search (JS). ESD WorkFirst staff record data in the Customer Automated Tracking System (CATS), which transfers to and receives data from the Jobs Automated System (JAS/eJAS). Staff also record some data in the WorkSource SKIES system.

Record in CATS	Record in JAS/eJAS	Record in SKIES
Attendance	Notes documenting services	**Initial Assessment***
Activity Planner	Complete the Summary Section of the CE	Enroll in WorkFirst Job Search under Seeker Programs
Actual Hours	Refer Back (RB) component code	Job Referrals
Auto Pay	Job Training (JT) if ESD provides or monitors training	Job Search Workshops and activities
Asset Inventory	**Entered Employment***	**Entered Employment***
Temporary Employment		

***For Program Year 2011, the DSHS-ESD contract includes 20% performance based funding. To insure full payment for the two performance based activities, Initial Assessments and Entered Employments, timely and accurate documentation is critical.**

Required Materials:

- WorkFirst Desk Manual (Job Preparation/Job Search) Section 4, 7, and 8
- WorkFirst Handbook: Section 4.2
- WorkFirst Standards Page 10-18
- Internal Controls Manual Sections 1, 2, 3
- Internal Controls Manual Section 3

Key Points:

- What information is recorded in CATS?

  Attendance, activities, and progress of WorkFirst participants in Job Search.

- Why do we emphasize the importance of "engaging" customers in their employment activities?

  Engagement helps us identify the participant's needs and possible solutions. It allows the participants to help set expectations that are important to them. Engaged participants are more likely to follow-through and actively participate.

- What value does the Activity Planner provide for WorkFirst participants?

  The Activity Planner helps participants plan their daily/weekly activities, and provides a history of their past activities. It should be used in combination with Activity/Job Search Logs to plan and follow-through on employment activities.

- What is the relationship of Activity/Job Search Logs to recording actual hours?

  The Activity/Job Search Log (in conjunction with the Activity Planner) is the documentation for actual hours.

- When a participant goes to work, what do we need to know and where do we record it?
  - Get employment information – Employer name, address, phone, start date, hourly wage, hours per week, job title).
  - Close the JS component in eJAS with an Entered Employment (EE) code.

- Enter the FT or PT component code, hours per week, start date of employment, and your ESD worker ID.
- Using the employment information from the participant, complete the employment screen in eJAS, including the benefits drop down.
- Record FT employment information in SKIES – Conclude WorkFirst program participation OR Record PT employment information in SKIES - Direct participant to DSHS WFPS to have IRP updated if there are any changes in participation requirements.
- If participant is receiving automatic transportation in CATS update the auto pay to reflect the component change

REMEMBER: Entered employment is one of the performance based contract measures.

What services do we provide to participants once they go to work?

- Assistance finding full-time employment or a better job for participants who have not exited TANF.

SUPERVISOR'S LESSON PLAN #4

MANAGE YOUR CASELOAD /INTERNAL CONTROLS/AUTOMATED SYSTEMS/OJT and WEX

Learning Objectives:

- Demonstrate how to use eJAS to access or document information
- Recognize the difference between eJAS and JAS
- Demonstrate how to create vouchers
- Demonstrate the process to batch vouchers for payment
- Describe the OJT process
- Describe the WEX process

Background:

eJAS (electronic Jobs Automated System) is accessed from the ESD CATS system. We use eJAS to record Component information, historical component information, the comprehensive evaluation, client demographics and entered employment as well as voucher lists. Case notes are recorded in eJAS by ESD and DSHS staff. eJAS can be used to email directly to DSHS Case Managers. Jobs Automated System (JAS) displays funding for support services, and is the system used to create vouchers and submit batches for payment as well as tracking funds and creating reports.

Vouchers: Support services are available to help participants become and stay employed. The Jobs Automated System (JAS) is used to create a voucher to pay for support services required by the participant in order to work, look for work, prepare for work, or accept a better job.
Support services **may** include such things as:

- transportation,
- interview and work clothes
- licenses
- tools and equipment
- moving expenses because of a job

Batches: A batch is a group of documents assembled for payment processing. We use three types of batches:

- **Vendor Batch –** we use vendor batches to pay the vendor for vouchers issued.
- **Warrantable Batch** – we use warrantable batches to pay the vendor for bulk purchases that were purchased on credit.
- **Non warrantable batch** – we use non warrantable batches to account for goods and services issued to participants and previously purchased by A19.

The Internal Controls Manual describes the process for both creating vouchers and batching vouchers step by step.

Note: These are lengthy processes. If possible assign new staff to an experienced staff member for hands-on training after review of the required written materials.

On the Job Training (OJT) and Work Experience (WEX) can be used to provide participants with current work experience/training if that is the best route to sustainable employment.

Required Materials:

- WorkFirst Desk Manual (JAS (Jobs Automated System) Pages 126
- WorkFirst Desk Manual (eJAS (electronic Jobs Automated System), Page 112
- Handbook: Chapter 2.2.9
- WorkFirst Standards, Page 19-20
- Internal Controls Manual Section 4: (Vouchers)
- Internal Controls Manual Sections 5: (Batches)
- Internal Controls Manual Section 7 Tracking Funds and Using Reports
- Internal Controls Manual Section 6 OJT and WEX
- Handbook Section 4.3 OJT and Section 4.4 WEX
- On-the-Job Training/WEX Standards

Key Points:

Review the Vendor Batch Process Flow (Internal Controls Manual Section 4). Discuss why the Internal Controls Manual requires each batch to have at least three signatures.

- Internal Controls must be in place to ensure that no one person has full control over the payment process.
- For WorkFirst voucher purposes, if a worker creates a voucher, they can prepare the vendor batch. However, they cannot approve or enter the batch.

Review the Tips for Vouchers and Vendor Batches (Internal Controls Manual, Section 4). Discuss why at least 3 different individuals must sign each voucher.

- The Counselor must sign before giving the voucher to the customer.
- The participant must sign when they receive the services/goods and prior to payment authorization.
- The Vendor must sign that services or goods were provided.
- The fourth signature (usually the supervisor) verifies all voucher information and authorizes payment.

Where is entered employment information recorded in eJAS?

From the eJAS client main menu select “Add Employment” and provide as much information about the employer, the job and the benefits as possible. Because this is one of our performance based contract outcomes, we also record this information in SKIES.

- Can we provide an OJT for a participant already working for an employer?

Yes, if the OJT offers wage progression by increasing skills to move a participant into a new job with the participant’s existing employer (or with a new employer).

Employment Security Department
WASHINGTON STATE

WorkFirst Desk Manual

Employment and Career Development Division
WorkFirst Program

January 24, 2012

Use this manual as a how-to reference

The purpose of this manual is to provide WorkFirst staff members the knowledge and skills to perform their duties in compliance with the policies and standards of the WorkFirst program. The manual also covers basic competencies such as engagement with participants, communication, and good record keeping.

In order to keep the information up-to-date, the manual contains links to Web sites, resources, and other documents that you will find useful. We suggest you save it to your desk top for easy access to the online information.

If you have questions or suggestion on how to improve this manual, contact the WorkFirst Administrative Unit.

The following documents guide the WorkFirst program. Consult them for answers to most questions about the correct way to do things.

- WorkFirst Handbook
- WorkFirst Standards
- Internal Controls Manual
- WorkFirst Support Services Directory

Websites you will want to become familiar with:

- Washington WorkFirst – statewide WorkFirst information
- Inside WorkFirst – ESD WorkFirst information
- Go2worksource
- WorkForce Explorer

The Employment and Career Development Division (ECDD) Training Academy provides training on other subjects to related to your WorkFirst duties.

Washington's WorkFirst program began in 1997 with an emphasis on helping participants move away from dependence on welfare and toward stable employment and economic self-sufficiency. WorkFirst provides families the services and supports they need to "*get a job, get a better job and have a better life.*" Over the years, WorkFirst has undergone many changes, but the main goal is still to help families move to self-sufficiency. Read a complete history of the Washington's WorkFirst program on the WorkFirst Web site.

WorkFirst, Washington's welfare reform program, is designed to help participants get what they need to prepare for and go to work. It is a partnership between state agencies and communities to work together to provide the necessary services and resources families need to be successful. Across the state hundreds of local organizations and business partners are actively involved, they may include tribal governments, Workforce Development Councils, community action agencies, non-profit agencies of all types, schools, labor organizations, and childcare, transportation, mental health and substance abuse treatment providers.

When WorkFirst began, it was decided that the heads of the partner agencies would form the **WorkFirst SubCabinet Structure**. The group is chaired by the director of the **Office of Financial Management** and meets several times a year to coordinate and make decisions about high-level policy and budget issues.

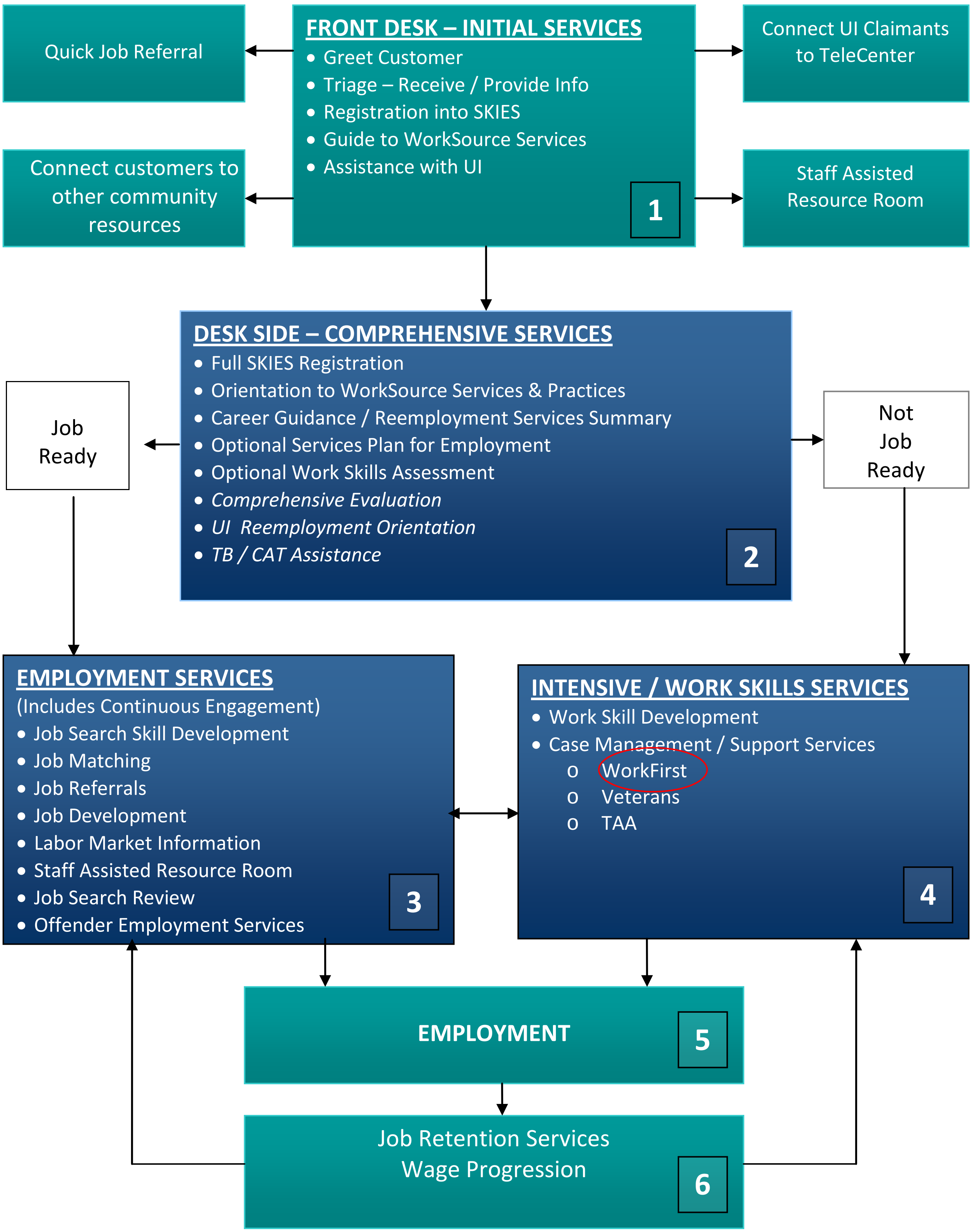
To learn more about the various WorkFirst programs and services, http://www.workfirst.wa.gov/.

WorkFirst and the ESD customer flow

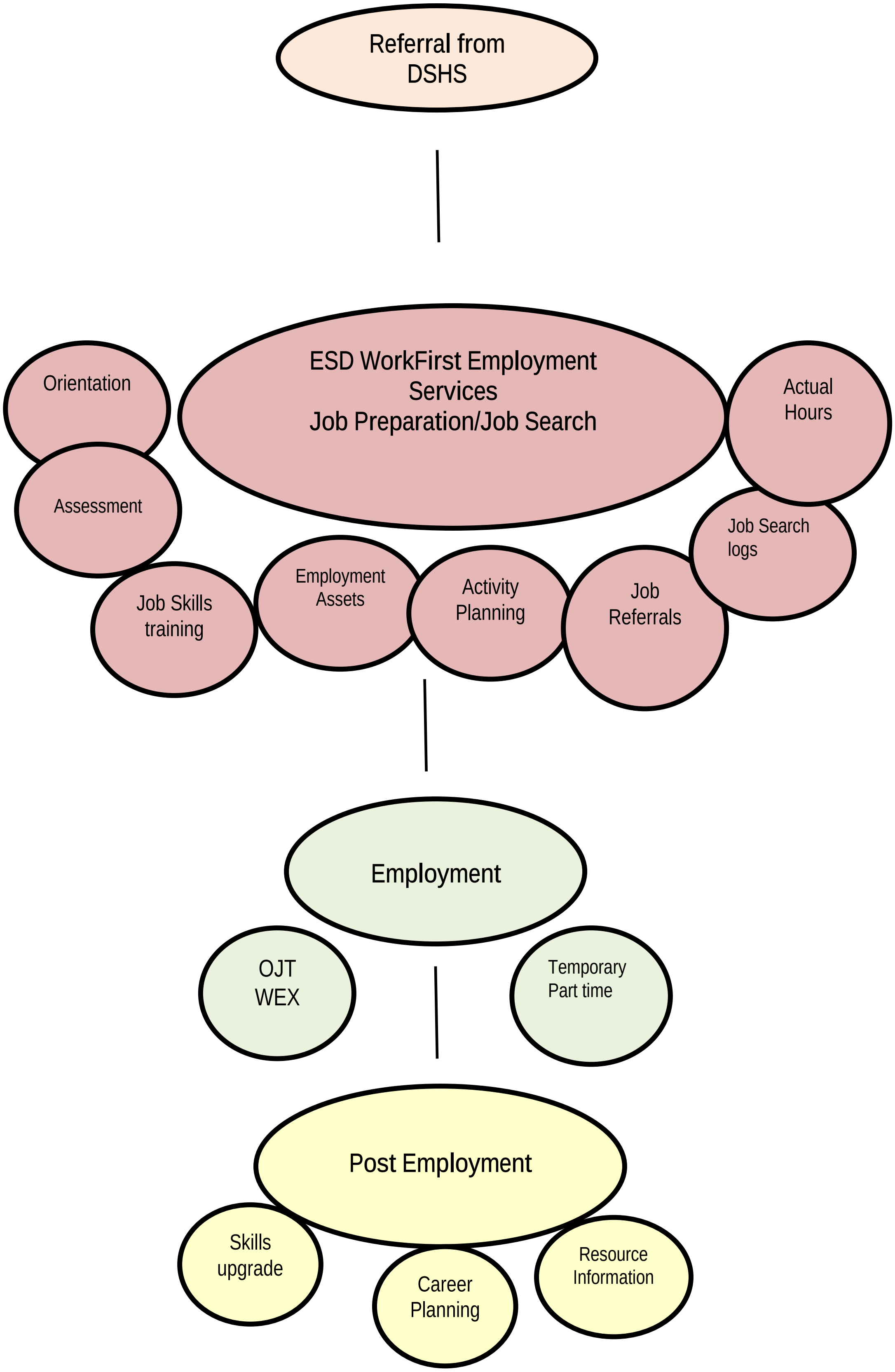
WorkFirst is a **Box 4 – Intensive** service in the ESD Customer Flow. It fits in this definition because it involves:

- Case management activities
- Support services
- Assessment
- Career planning

Customer Flow



ESD WorkFirst at-a glance



Working with WorkFirst Partners

The WorkFirst Web site provides information on WorkFirst partners and their roles and responsibilities.

- Who are the five WorkFirst partners?
- What are their main roles?
- What is your role as an ESD partner in building an effective WorkFirst partnership?
- What is a Local Planning Area (LPA)? Who are the members of your Local Planning area?

Communicating with Partners, Participants, and Colleagues

Communication with your co-workers and your local partners is crucial to providing timely and seamless WorkFirst services. This means communication at all levels from e-mails, phone calls, or talking face to face, to monthly meetings with your partners. Partnership meetings allow you to share changes, answer questions, and air concerns.

ESD employees should actively participate in LPA meetings. LPA meetings are the foundation for cooperation, planning, and efficient use of resources.

Internally, WorkFirst coaches and supervisors should meet on a regular basis (weekly or every other week) to go over reports, changes to the program, questions, and concerns.

- E-mail
- eJAS e-messages
- Telephone
- Face to face meeting
- Continuous activity planning (CAP)
- eJAS case notes
- SKIES notes

Tips for engaging participants in conversation

Clear, open communication with WorkFirst participants helps you learn about their needs and skills. Once you learn that, you can develop a plan for work and self-sufficiency. Talk to participants and engage them in their success plans.

- Use short sentences
- Get to the point
- Get rid of extra baggage
- Use everyday language

- Avoid outdated expressions
- Focus on doing (action words)
- Speak slowly and articulate your words
- Pay attention to your body language

Paraphrase and summarize to clarify

Paraphrase – restate what the person said in your own words.

- In other words…
- I gather that…
- If I understand what you are saying…
- What I hear you saying is…
- Pardon my interruption, but let me see if I understand you correctly…

Summarize – pull together the main points. This way you can emphasize the key points and set the stage for more discussion. You must listen carefully in order to organize the information. Try out these phrases:

- If I understand you right, your main concerns are…
- These seem to be the key ideas you have…

Know the jargon or the preferred way of communicating

- Know the language of the listener
- Adjust to the other person's preferred way of talking
- Mirror the other person's language

Nonverbal communication or body language – eye contact, gestures, and expressions—says a lot

Eye contact reveals our moods and feelings.

- Sometimes we feel uneasy if we cannot see the eyes of the person who is talking.
- People who avoid eye contact appear untrustworthy.
- Some cultures do not use eye contact.
- You can use eye contact to start conversations and motivate customers.
- People maintain eye contact if they are interested in the conversation or the person.
- Maintaining eye contact is important in maintaining effective communication.
- Match your eyes and smile in order to convey genuine feelings.

Smiling is a powerful cue that expresses:

- Happiness
- I'm glad that you are here
- Warmth
- Liking

Smiling is often contagious. When you smile, participants will react favorably to you and learn more from you. Try putting a smile on your face before you pick up the phone.

Always acknowledge others' verbal or nonverbal message.

Two types of questions

Closed questions:

- Get a one-word response and inhibit thought.
- Give you the facts.
- Are quick and easy to answer.
- Begin with who, when, and which.

Open-ended questions:

- Open up discussion and invite a wide range of answers for creative problem solving.
- Begin with how, what, and how come (not why).
- Focus on feelings, not just facts.
- Challenge the speaker to think further.
- Clarify both your and their understanding

When you listen actively, you really hear and understand

- How do you know when someone is listening to you?
- How does it feel when someone "acts" as if he or she is listening to you?
- Active listening is a habit.
- Active listening and multi-tasking are contradictory.

Listening tips:

- Listen with an open mind.
- Give your full and undivided attention.
- Focus on the content.
- Listen for big ideas, hidden meaning, and feelings.
- Ask questions for clarification.

- Make eye contact.
- Encourage the speaker by nodding or saying, “I see.”
- Pay attention to nonverbal clues (body language).
- Monitor your own nonverbal signals.

Engage your participants in transformational relationships

The Employment & Career Development Division (ECDD) has moved from a transactional approach to job search to a transformational approach. What does that mean?

Transactional	Transformational
Case manager	Coach
Expert	Partnership
One size fits all	Individualized
Confrontation	Collaboration
Change imposed from outside	Change is drawn from within
Closed questions	Open ended questions & paraphrasing
Tells someone what they should do	Seeks to understand

Open ended questions, summarizing, and the other communication skills mentioned help make a transformational relationship.

We expect that WorkFirst coaches will engage with participants using a transformational approach. ECDD offers training in many areas that support this approach. You might want to explore motivational interviewing, appreciative inquiry, and crucial conversations.

Writing Good Notes and Documentation

Throughout this manual we will refer to documentation in eJAS and SKIES. We require good record keeping in order to provide information and seamless services. Write notes:

1. Clearly and briefly – focused and to the point
2. Concisely - include only necessary information
3. Accurately and completely – check your facts
4. Timely – record them as soon as they occur
5. Readable (grammar, punctuation, spelling, no acronyms)

A note is a written record of your work with a participant. It provides a permanent history. “If you didn’t write it down, it didn’t happen.” It is a learned skill and requires professional judgment.

No matter where you enter your notes (eJAS, SKIES, and so on), the following rules and guidelines apply.

Why document

- Record history.
- Keep information about progress toward goals.
- Justify plans and actions.
- Provide accountability and quality control.
- Tell the story.

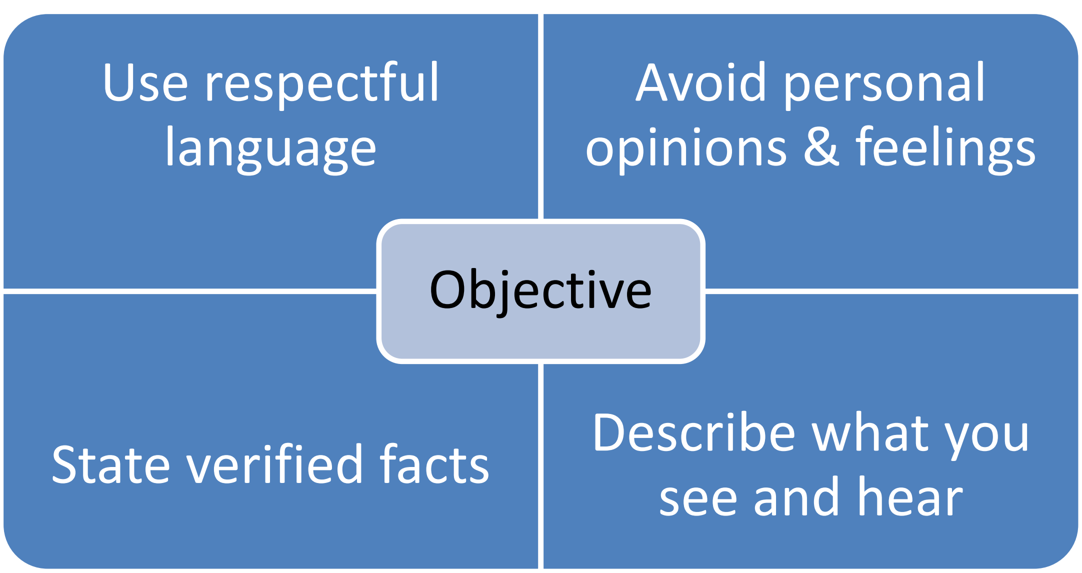
Three more reasons to document.

1. To help you **remember**.
2. To document **unusual** situations.
3. To document **behavior**.

Ask yourself:

- Why am I writing this note?
- Who is going to read it?
- Will the note make sense to them?
- Will the note answer the main questions they might have?

Write from an **objective** point of view



Note: If you do include your own opinion, identify it and tell why you think that way.

Good record keeping tips

1. Write as if you are talking to just one person. Visualize someone who knows very little about your work.

2. Use short, simple paragraphs or sentences. Write so that everyone can understand what you are saying.

3. Limit abbreviations: use standard, well-known technical terms and abbreviations or provide a definition. Avoid acronyms.

4. Make an outline from words like: Who, What When, Where, How, Why.
   - Summarize the interview or conversation recording what the individual told you.
   - Describe observed behaviors.
   - Write objectively and stick to the facts.
   - List anything that wasn't resolved.
   - List anything questionable and any verification received.

Confidentiality

WorkSource and WorkFirst professionals must keep information about job seekers, participants, and others private and secure. This is true for both verbal and written communication. All individual information is confidential under state and federal law.

As a state employee, you have access to client and employer records or private information. Access the information or discuss the records only when necessary to do your job. You must maintain an awareness of ESD's guidelines on disclosure of information and sign a Notice of Non-Disclosure. When you leave your current position, information obtained during your employment must remain confidential.

All WorkFirst partners record notes in eJAS. The WorkFirst Handbook is your resource for case notes and how to document using eJAS. You can share information with WorkFirst Partners without a release of information when sharing that information is necessary to provide services to the participant. When you have a situation with a participant the involves chemical dependency, family violence, mental health or HIV/AIDS and STD, ask the participant if you have their consent to discuss this with the DSHS case manager in order to get them connected with the right resources.

If the participant gives you permission, contact DSHS to give the full story of the situation and then use the special records tabs to briefly document Family Violence, Mental Health, Chemical Dependency, and HIV/AIDS and STD. (Example: Advised DSHS case manager of personal matter involving participant). You can add to these records, if the participant gives you permission, but only DSHS employees can read them.

You can find more information on ESD's policies data classification and protection and records management on Inside ESD under Administrative and Management Policies.

Using WorkFirst Resources, Community Resources, and Programs

What we know about intensive services is that you can't do it all alone. You need to know what services the partnership and your community has to offer, how to refer participants to those services, and some basic understanding of the eligibility requirements.

Types of resources

- Statewide WorkFirst resources and programs
- WorkSource resources and programs
- Local partnership resources
- Local community agency resources

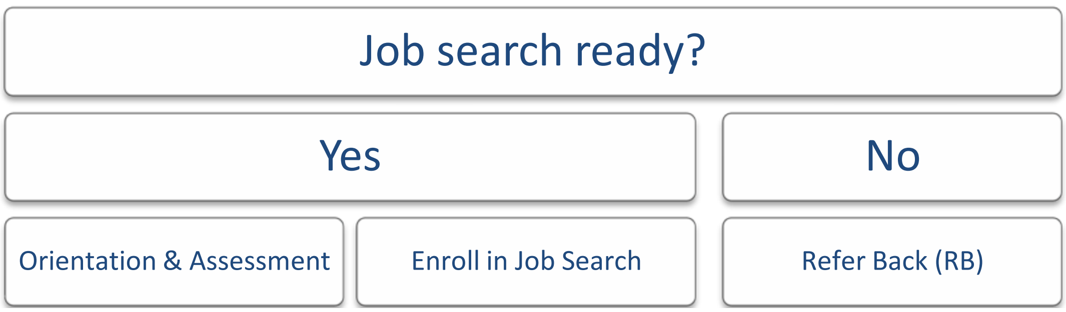
Do you know what community resources and programs are available in your area?

- Local Crisis Centers
- Child care or respite care
- Clothing banks
- Free or low cost furniture and house wares
- Document replacement (for example social security card or birth certificate)
- School supplies
- Education assistance
- Financial planning help
- Health services
- Youth Assistance Programs (Boys & Girls Clubs)
- Health Insurance
- Housing
- Legal Services and Advocacy
- Transportation, Utilities & Telephone (Community Voice Mail)

Is the participant ready for job search?

ESD WorkFirst Standards and the WorkFirst Handbook 4.1.2 state that before a participant can begin job search, they must be ready to look for work. WorkFirst employees must determine if the participant has the following:

- Transportation to look for work and get to work.
- Child care (and a back up).
- Able to start work within four weeks.
- Able to participate as outlined in the Individual Responsibility Plan (IRP)
- Can participate at least 10 hours a week (but could be less if they are in another core activity)



SKIES Documentation
Seeker Services
Program Enrollments
Enroll in WorkFirst Job Search

Orientation to ESD job search activities

The orientation can be in a group or one-on-one. Make your orientation welcoming and engaging. Provide participants information about ESD services and include information about the following:

- Support services
- Benefits of KeyTrain
- Employment coaching
- Job referral and job matching
- Job search activities, such as job clubs, employment competencies, and interviewing
- How to contact a WorkFirst Employment Coach
- Directions on next steps

- How to complete the Job Search Log
- Job Search requirements (attendance using Customer Automated Tracking System [CATS])
- How to report Temporary, Part Time and Full Time Employment information
- Post employment services

Your office may present the orientation as a PowerPoint, show the WorkFirst Job Search Log DVD, or give participants written information as handouts and flyers. In compliance with the Governor's Executive Order, use plain language in your PowerPoint and all written materials to make them engaging and interesting.

> Remember - No matter what you include in your WorkFirst Orientation, this is your chance to engage the participant. A smile, an introduction, and a "Hi, I'm glad you're here," can go a long way.

Steps to a Successful First Meeting

1. Make your greeting engaging

    a. Introduce yourself
    b. Thank the participant for coming and making a first step toward success
    c. Discuss the benefits and goals
    d. Describe the process
    e. Speak in "you" terms, for example "what you will gain, what you will do"

2. Seek motivation

    a. Ask – How they feel about being here, what they expect to accomplish
    b. Tell me about your skills and history
    c. Identify problems and solutions

3. Reinforce success

    a. Empathize with the situation
    b. Identify positive outcomes
    c. Clarify common and unique circumstances

4. Set expectations

    a. Set personal goals and program goals
    b. Identify what they will measure
    c. Ask “what is important to you?”
    d. Tell them what you can and can’t do
    e. Provide information
    f. Strive to meet their initial expectations

5. Give options

    a. Provide participant choices
    b. Discuss services available from both WorkFirst and WorkSource
    c. Outline pluses and minuses of alternatives

6. Plan services

    a. Outline the steps - activity planner
    b. Emphasize the first step
    c. Create a partnership with the participant

7. Outline the requirements and the forms

    a. Start with the value and then move to costs
    b. Tell why and what the participant gets
    c. Stress service benefits
    d. Complete paperwork quickly – don’t drag it out

8. Promote next steps

    a. Repeat and reinforce the most important aspects of the services
    b. Restate the outcomes and the benefits of getting started quickly
    c. Ask how their life would be different

Help participants understand and use labor market information to set realistic employment goals

To understand your local labor market, consider:
- What employers are within commuting distance?
- Is public transportation available, what about parking?
- Do employers provide or require special training?
- Which employers are hiring? Which ones are reducing their workforce?
- What are the wages for occupations in your area?

Helpful Hint: If you don't already know your business outreach worker in your office, find out who they are and get to know them.

Complete the Work Skill Assessment (WSA)

To meet our performance based contract commitment we must provide each WorkFirst participant a Work Skill Assessment (WSA). The WSA must be administered and interpreted for the participant prior to the completion and recording of their Initial Assessment (IA) in SKIES. The SKIES IA must be completed no later than 10 days after the start date (entry date) into Job Search (JS).

The WSA is accomplished through interviews and the use of appropriate assessment tools such as: MySkills MyFuture, MyNextMove, Career Builder, Job Hunter Module 2, Go2WorkSource – Career Links, and Skills Center.

Use pertinent information from these or other assessment tools to complete a quality IA in SKIES.

The most recent IA date is recorded on the SKIES Services Screen. The WorkFirst Initial Assessment service must be taken for **each** Initial Assessment completed and for all existing Initial Assessments reviewed/updated because a new Initial Assessment cannot be entered. The service will be used to collect the Initial Assessment data for our performance based contract.

The assessment must at minimum address:
- employment history
- education
- employment strengths
- job skills
- local labor market information relating to employment goals

Each IA must be a quality assessment and add value for the participant and staff providing current or future services. ECDD WorkFirst Administration staff will use the matrix (Work Skill Assessments Tool Matrix 10-26-11.doc) when reviewing IAs for quality. Results of the reviews will be provided on a regular basis and should be used as a quality improvement tool.

SKIES Initial Assessment (Full SKIES Registration) – required for all participants in Job Search

You must complete the SKIES IA within **ten business days** after the participant is referred to job search. If the participant has a current (within 90 days) assessment, you should review the current IA and update it if needed.

KeyTrain - required for participants with a high school diploma, a GED, or less

KeyTrain is both an assessment and a training tool.

You must give WorkFirst participants with a High School Diploma, GED or less the KeyTrain Quick Guide Assessment within 5 business days of when they enter into Job Search. The Quick Guide Assessment consists of a 12-question work skills test. The KeyTrain Quick Guide shortens the intake process by determining within 15 – 20 minutes an appropriate path for improving a participant's reading for information, applied mathematics, and locating information skills.

- Review and interpret the results with the participant.
- Discuss the skills they have in terms of the jobs they are considering.
- If the participant needs to gain skills, tell them about the eLearning opportunities in KeyTrain.

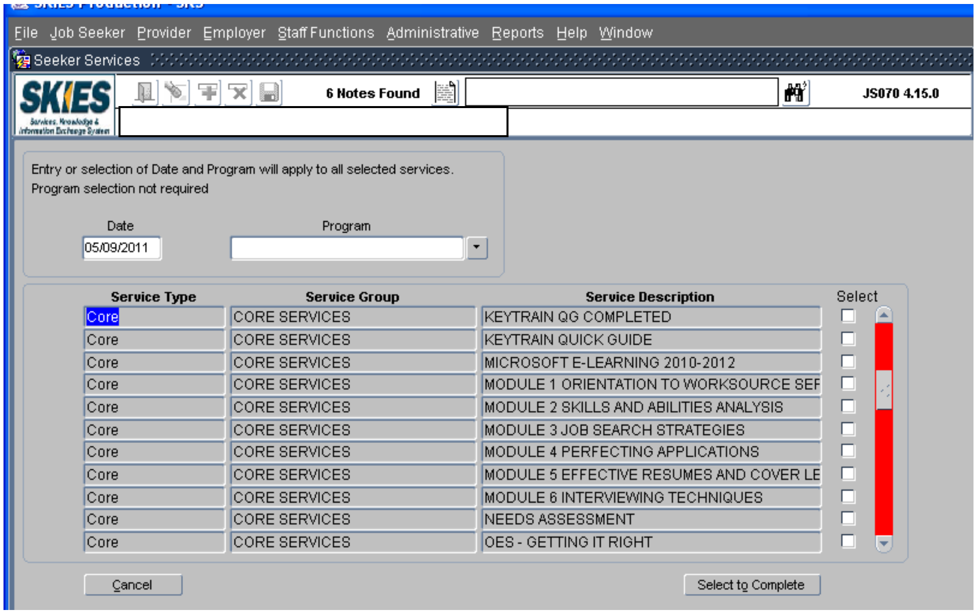
Orientation and Assessment

KeyTrain has eLearning modules for participants to take to build job related skills. You should tell participants about all the features and benefits of KeyTrain. The time taking the modules counts as credit for job search. Based on your office procedures, refer participants or set them up in the learning modules.

- Reading for information
- Applied mathematics
- Locating information skills
- Business writing
- Listening
- Observation
- Teamwork
- Career skills

SKIES Documentation

- **KeyTrain Quick Guide (QG)** --- (recommended Quick Guide as a next step for job seeker)
- **KeyTrain QG Completed** --- (seeker completed QG)
- **KeyTrain Skill Building** --- (referred to KeyTrain e-learning modules)
- **KeyTrain Follow up** ---(seeker completed QG, worked through e-learning modules and staff provide more information or assistance for career advancement)



KeyTrain fills a gap for many of our participants who are not able, eligible, or interested in formal education or vocational training, but who still could benefit from an assessment of their skills and skill development training modules.

Keep in mind that KeyTrain is not a substitute for:

- instructor-led Adult Basic Education (ABE)
- English as a Second Language (ESL)
- vocational training
- apprenticeship
- a college certificate or degree

We will continue to make recommendations and referrals back to DSHS when education may be the best option for participants.

Complete the ESD Employment Plan Summary Section of the Comprehensive Evaluation (CE) in eJAS

The Comprehensive Evaluation (CE) in eJAS includes a section for ESD WorkFirst employees to complete a recommendation regarding the type of job the participant is looking for. It must include:

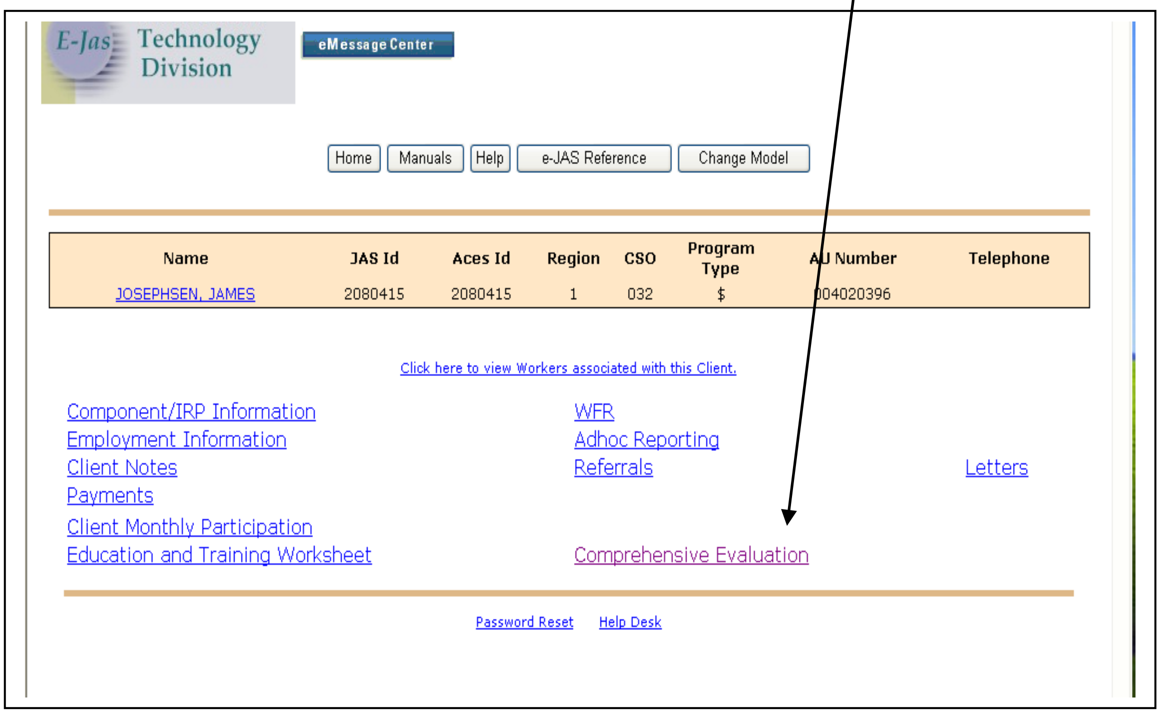
- the kind of work the participant is looking for
- a list of steps to reach their employment goals
- information on how the labor market supports the employment goal
- a statement verifying that the participant was involved in developing the employment plan--optional

You have the option of Uploading the CATS Employment Plan into the CE or only completing the Employment Plan Summary Section. If you only complete the Employment Plan Summary section, you can Save/Pend comments and return later to add more comments or just enter comments and finish the Employment Plan Summary by clicking the "Save/Finish" button.

If you only complete the Employment Plan Summary, you can enter text directly into the Employment Plan Summary text box

Click the Save/Finish button to save the Employment Plan Summary. You can't make changes once you click the Save/Finish button. If you need to make changes, contact the ESD WorkFirst Administrative Unit (Staff Directory) for assistance.

You can access the Comprehensive Evaluation (CE) through CATS or directly from eJAS. From the eJAS home page, select "Comprehensive Evaluation."



Note: If DSHS has not completed a new CE—that is the CE is over 6 months old—the system will not allow you to complete the ESD section. Contact the DSHS Case Manager to find out if a new CE should be completed. Document in eJAS notes the results of your discussion.

Continuous Activity Planning (CAP)

Use the CAP in two situations:

1. a participant is not ready for job search
2. a participant is not participating

Continuous Activity Planning (CAP) is an informal meeting or joint evaluation with the participant, available WorkFirst partner(s), DSHS co-workers and WorkFirst Program Specialist (WFPS) or WorkFirst Social Worker (WFSW) to discuss the participant's progress and participation. The CAP should result in a recommendation for the participant's next activity. You can conduct the CAP via phone or in person. You must document it in eJAS using "Continuous Activity Planning" note type.

You must include the following in the CAP note in eJAS:

- The names of all the participants in the meeting
- How the meeting was conducted (phone or in person)
- When the CAP took place
- Results of the meeting

Remember – the CAP allows everyone involved to communicate so there is no confusion about what happened in the past, the current situation, and what the next steps are.

Refer Back (RB) Participants

When the CAP decision is to refer the participant back to DSHS, you must close the Referral Component (RI) or Job Search Component (JS) before you enter the Refer Back Component (RB). Select a reason code and enter a CAP note.

Refer Back from an RI	Refer Back from JS
1. Close RI	1. Close JS
2. Enter RB	2. Enter RB
3. Chose one of the **5** reasons below	3. Chose one of the **8** reasons below

Select	Refer Back Reason
	Participant Refuses to Participate
	Participant Unable to Participate (i.e. medical/legal)
	Participant Has No Child Care
	Participant Has No Transportation
	Other CAP Outcomes

Select	Refer Back Reason
	Loss of Contact
	Participant Refuses to Participate
	Participant Unable to Participate (i.e. medical/legal)
	Participant Has No Child Care
	Participant Has No Transportation
	Other CAP Outcomes
	Non-Compliance/Participation
	Completed 12 Weeks of Job Search

Remember –If the participant never shows, the RI will expire. DSHS closes the RI component. We do not.

Remember - Always close out a component and then enter a new component in two separate steps. When you complete your eJAS entries, you must then close WorkFirst participation in SKIES.

What if a Participant Refuses to Participate?

Participants must state that they will not or are not going to participate in order to select “Participant Refuses to Participate.” Use the reason code “Non compliance/participation” when participants do not show or are simply not participating as required.

You should direct participants with the following severe obstacles to the DSHS Social Worker.

- Severe domestic violence issues
- Severe medical issues
- Requires immediate entry into in-patient chemical dependency treatment
- Presenting severe mental disorder

Support Services

What are Support Services?

- Support services are goods and services purchased to help participants become self-sufficient.
- Support services meet a participant's needs throughout their stay on TANF.
- Support services are provided based on the real and immediate needs of the participant.

Detailed information about providing and documenting support services is available in the Internal Controls Manual (ICM), Section 3, including:

- **How do you know if you should provide a participant with support services?**

➢ The Internal Controls Manual (ICM) has a list of questions you should ask to determine if support services are the best and most economical way to meet the participant's need.

➢ Support Services can be provided for work related needs, safety related issues, and any other activity contained in the participants IRP.

- **What categories of goods and services can be purchased?**

  The Support Service categories and allowed costs are detailed in the WorkFirst Support Services Directory.

- **How does the WorkFirst program pay for support services?**

  WorkFirst staff create a voucher (a payment authorization) to pay a vendor for support services. Once you determine that a participant meets the criteria for support services, you will create a voucher to pay the vendor for the goods or service. A step by step guide for creating a voucher in JAS is detailed in the ICM Section 4.

- **How do I know what to document in eJAS notes?**

  Review the ICM, section 3. You must always document:

  - The reason (either to look for work, stay employed, or personal safety).
  - Any community resources considered.
  - That this was the most economical option.

  ➢ For license tabs and fees: state that you verified that the participant is the registered owner of the vehicle and list the year and make of vehicle.

  ➢ For car repairs: state that you verified that the participant is the registered owner of the car and list the year and make of the car. State that you obtained two estimates for the repair, listing vendor and cost. If the participant is contributing to the cost, include that.

  ➢ For tools: state that the tools are required to accept employment or to maintain employment, and that all other employees (or students) have the same requirement for tools.

  ➢ If you reduce the requested amount or deny the request, document it and the reason why you did so.

- **What is a redirect warrant and what do I need to do to create one?**

  Some vendors, such as Department of Licensing (DOL), Department of Health (DOH), Department of Labor and Industries will not accept WorkFirst vouchers. They require a State Warrant for their services.

  Various other vendors providing certifications and licenses also do not accept vouchers.

  These are called ***redirect*** warrants because the voucher does not pay *directly* to the vendor, the warrant is “redirected” to the local WorkFirst office to be picked up by the participant (usually) and delivered to the vendor. Review the ICM, Section 4 for a step by step guide to creating a redirect warrant.

Helpful Hints for paying vouchers for warrants directed to the local office:

Authorize only one voucher and payment per day per vendor to make sure the warrant is for one person and only one fee. (You may want to make more than one account per agency so several warrants can be paid in one day.)

You do not have to get the vendor signature on the voucher. However you still must obtain a receipt or other verification of purchase or service.

For the Washington State Department of Health:

When batching for payment, identify the type of license the fee is for in the invoice number field, i.e. LPN, NAC, RN.

For County Departments of Health or other vendors:

When batching for payment, identify the type of license the fee is for in the invoice number field, i.e. Food Handler, ACLS for RN, etc.

What is an Exception to Rule (ETR)? (see ICM Section 3)

The exception to rule process is a formal request to exceed Support Service limits. You can request an ETR when a family's safety is clearly threatened or their situation differs from the majority and has a significant impairment or limitation that is not addressed by current limits. The ETR request must be reviewed and signed by the WorkFirst Supervisor. The WorkFirst Program Administration Unit makes the final decision on any requests. To request an ETR, see the step by step process in ICM Section 3.

What is the role of the Supervisor in the Support Service process?

- The supervisor keeps financial documents (vouchers, warrants, batches, bus passes, and tickets) and the embosser secured and locked.
- The supervisor reviews vouchers and approves batches for payment.
- The supervisor reviews and approves (or denies) ETR initial requests.

What is the role of the WorkSource Specialist in the Support Service process?

- WSS4s approve or deny, document, create, sign, and emboss vouchers.
- WSS4s prepare, key, and compile batches.

Job Preparation/Job Search

Job preparation is the beginning of employment services and can last up to two weeks. Use this time to immediately engage participants in activities to help them stay involved and build the skills to move towards employment. Job preparation allows participants to assess their skills and acquire the basic skills they need to get into the right job. The orientation and assessments occur during the job preparation phase. Life skills and skills enhancement training also take place as part of job preparation.

Skills Enhancement or Job Skills Training (JT)

Job skills training during job preparation enhances specific skills that are marketable to employers and includes the following activities:

- Computer or keyboarding classes, classes to learn software applications
- Developmental education (such as, math, English, reading) or prerequisites required for a vocational certificate
- Any education and training required by an employer or to provide a person with the ability to obtain employment or to advance or adapt to the changing demands of the workplace including part-time vocational education classes.

If ESD provides the training, enter the JT component code in eJAS and monitor training attendance. In most cases, you will not change the hours the participant will be in job search. You will add the training hours to the hours scheduled in job search (unless adding the training hours makes the total over 40 hours).

Skills Enhancement training can be provided by:

- Public or private community and technical colleges
- WorkFirst partners
- Community based organizations
- Businesses

Whether ESD provides the training or the participant takes classes with another provider, you will need to have the participant provide proof that they attended the class. Make sure you document this activity at your one-on-one meeting with the participant.

If you refer the participant to training that will not be monitored by ESD, contact the DSHS WorkFirst Program Specialist (WFPS) and ask them to change the Individual Responsibility Plan (IRP) to reflect the hours of JT and JS, and the duration and type of training.

Participation requirements for job preparation/job search

Job preparation with job search can last up to 12 weeks. Participants can leave early if:

- They find a job.
- Fail to participate.
- You determine another activity would suit them better.

You can also extend the time if you determine the participant has marketable skills and just needs more time to find a job.

Job Preparation/Job Search 12 Weeks	
Job Preparation Up to 2 weeks	**Job Search (can be extended)**
Orientation Assessment Skills Enhancement Training Employment Competencies	Contacting an employer in person or researching employers Completing online applications for employers Looking online for job openings Creating, targeting, and updating resumes, cover letters, and applications Making cold calls to employers Requesting and attending informational interviews Attending interviews Follow-up calls Attending the Job Hunter Workshop classes (resume and cover letters, applications, interviewing, and researching labor market)

At a minimum the participant must sign into CATS or be signed into CATS at least twice per calendar week (Monday through Friday). You can adjust this to meet certain participation requirements such as daily workshops. The coach sets the days the participant attends in CATS in the “Attendance Days Set screen.”

- Review the previous activity planner
- Record the evaluation on the activity planner
- Develop a new activity planner
- Use the Job Search Log to verify completed activities and determine actual hours of participation

Develop an Activity Planner with the Participant

What are your responsibilities in creating an activity planner?

- Meet with the participant at least every 14 days and complete the evaluation at least every 14 days.
- Engage the participant in the development of their job search activities for the week. Let them know about the activities, support, and resources that the WorkFirst program and the WorkSource have to offer them.
- Provide enough detail so the participant knows what their responsibilities are.
- Give the participant a printed copy of their Activity Planner.
- Update SKIES each time you update the Activity Planner.

SKIES Documentation
Seeker Services
Intensive
Activity Planner (WorkFirst)

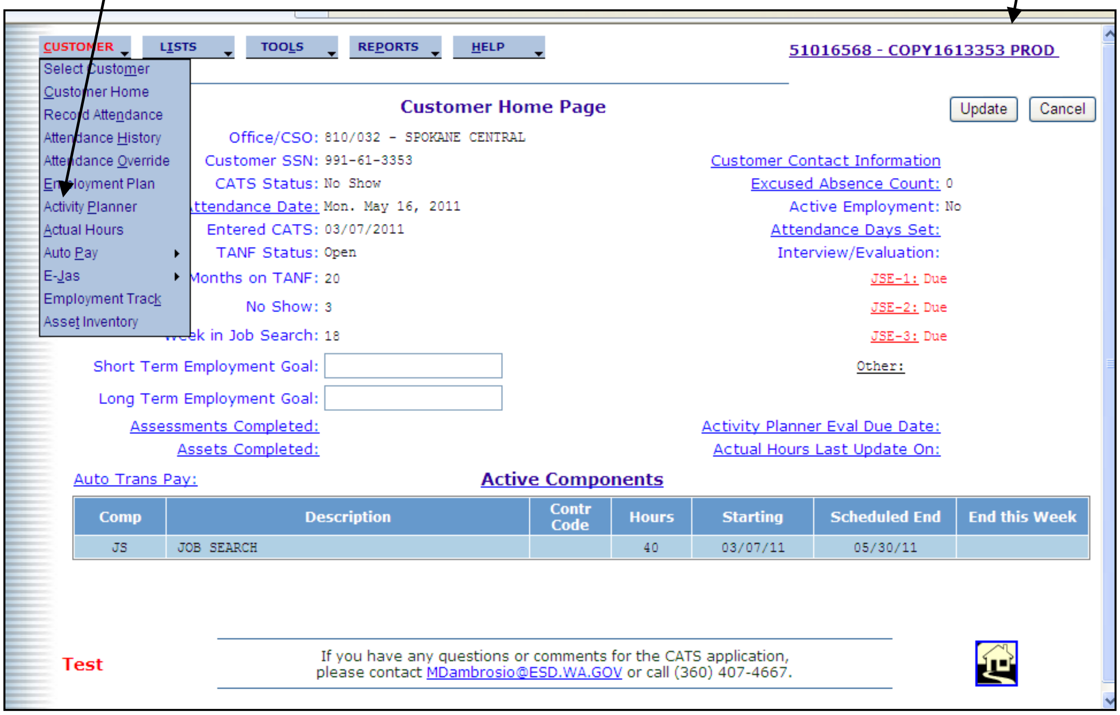
What are the participant's responsibilities?

1. Complete the activities as planned.
2. Fill out their job search the logs with detailed information about what they did to look for work or to prepare to look for work.

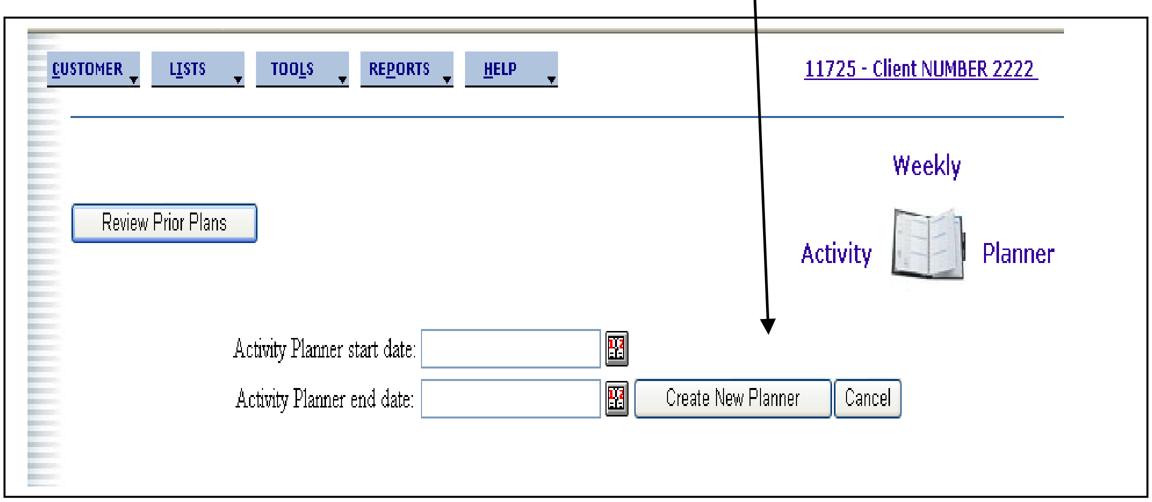
Helpful Hint: Use cut & paste in the weekly requirement field. We recommend you key in text in the daily requirement field.

Steps to complete or update the Activity Planner

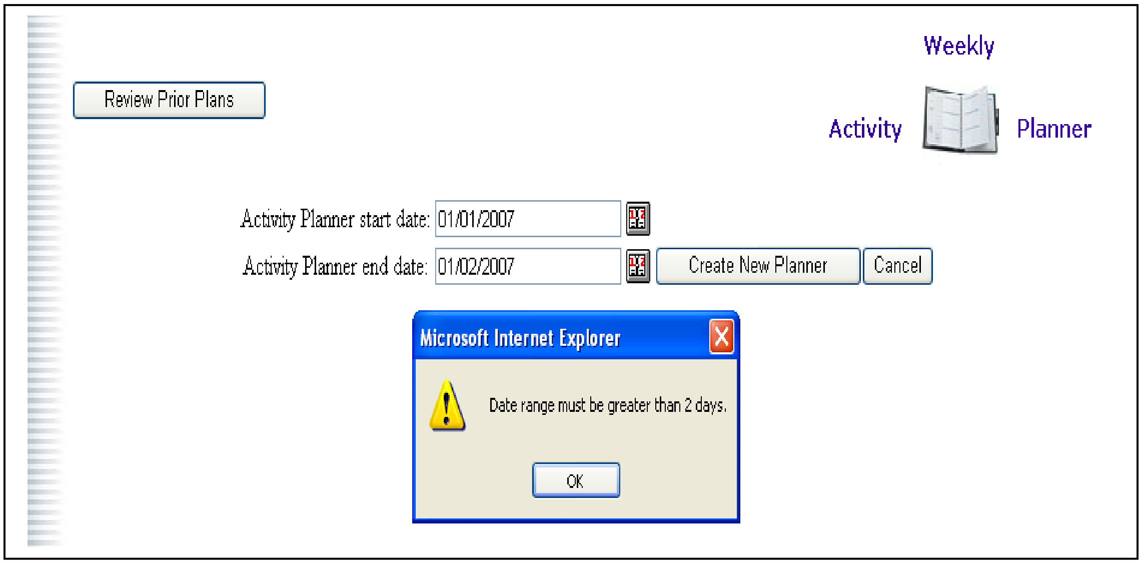
- First, select the participant to complete or update their Activity Planner
- Next, access the "Activity Planner" using the "Customer" tab.



- The first screen of a new planner pops up. Type in or select the start and end dates of the planner. Click on "Create New Planner." If you decide not to make a planner, click on "Cancel."



You must create the planner for 3 to 14 days. If the planner is less than 3 days or more than 14 days, you will get an error message.



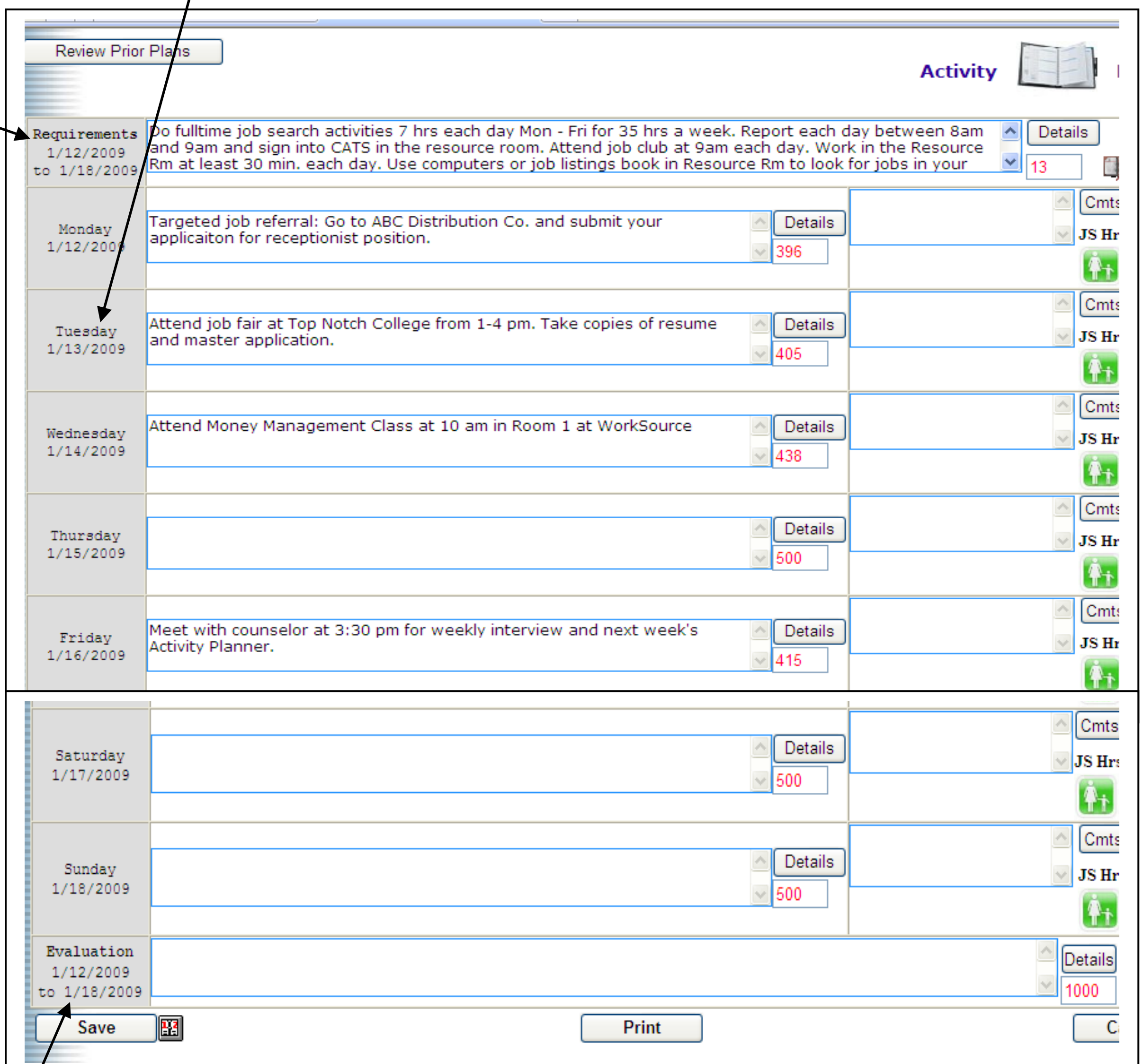
After you have set the dates and click “Create New Planner,” a new Planner becomes available.

Job Preparation/Job Search

Complete these sections in the planner

Requirements - List the specific days the participant is required to report in person and sign in or be signed into CATS, recurring activities, and who to call if they cannot come in.

Days of the week - List by day all required activities planned for each participant, for example, workshops, job clubs, short-term job skills training, and employer contacts. If you have not assigned a specific activity for a day of the week, leave that day blank.



Evaluate participation at the bi-monthly meetings using the participant's completed Job Search Log.

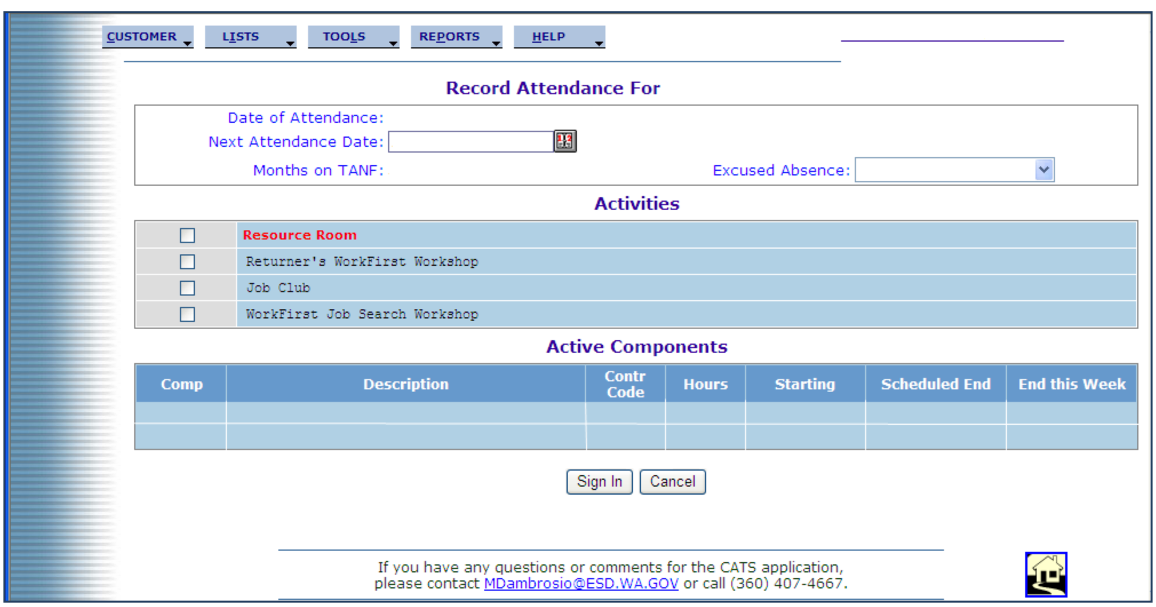
Set Attendance Requirements

The minimum requirement for checking into CATS is twice per calendar week (Monday – Friday)

- Set the days the participants must sign or be signed into CATS.

Use the Record Attendance Screen

Use the Record Attendance Screen to document the participant's participation in various activities throughout job search.



Ensure the Participants Gain Proficiency in the Employment Assets

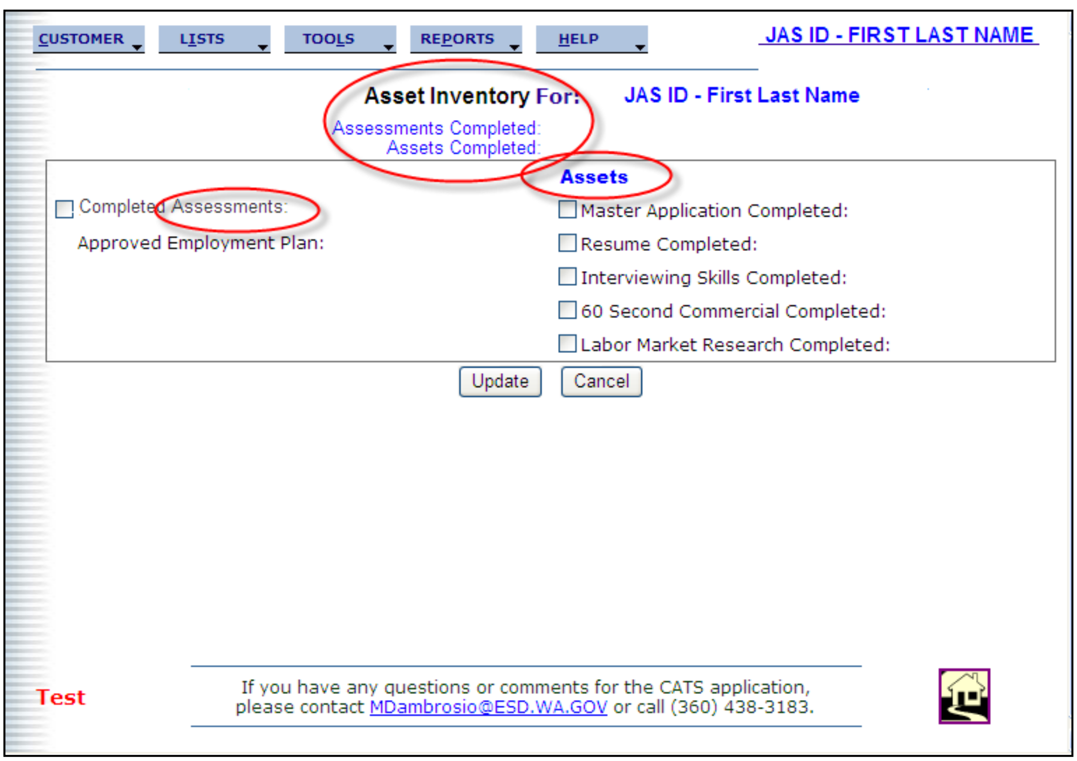
For a participant to apply and interview for a job, they must have the following:

1. Master Application
2. Resume
3. The 60 Second Commercial
4. Interviewing Skills
5. Labor Market Research

Use your scheduled meeting with the participant to assess their progress toward completing the employment assets.

Document in CATS the completion of each asset.

- Select the List tab
- Asset Inventory



SKIES Documentation

- For the Resume, use Resume Assistance

If the participant completed the Job Hunter Modules to gain the other assets, you would record them as listed.

- For Master Application, use Job Hunter Module 4
- For the 60 Second Commercial, use Job Hunter Module 2
- For Interviewing Skills, use Job Hunter Module 6

If a participant re-enters job search preparation, you must re-evaluate all assets.

Screen Job Search Logs

Use the Job Search Logs to monitor a participant's daily job search activities. When you collect a completed log, make sure you give the participant a new log.

When you receive the log, check the items below and then initial the log.

- **Participant's information:** Name, JAS ID #, required job search hours, Date of activities (days of the week).

- **Activity:** Employer Name or activity, address, web address or e-mail, phone or fax number,

- **Contact type:** job applied for, contact name or instructor, how contact was made box marked, How applied what happened box marked and hours for the activity.

Use your scheduled meeting to discuss any unverifiable contacts or activities on the log, or unaccountable time. Order more Job Search Logs from the ESD printer.

Verifying Job Search Logs

During a scheduled one-on-one meeting with the participant, review the previous completed Job Search Logs with the participant. Check in SKIES to verify job referrals, job matching referrals, hiring events, Job Hunter Workshop modules, and other activities.

Reporting Actual Hours

Calculate actual hours of participation based on when the participant starts and ends their job search activities each day.

Job Search Starts each day:

- When a participant arrives at their WorkFirst/WorkSource Office

  or
- When the participant stops at an employer's business in route to the (WorkFirst/WorkSource office) for their daily check in

  or
- When the participant begins a job search activity (for example online application)

Job Search ends each day:

- When the participant ends their last job search activity

  or
- When a participant leaves their WorkFirst/WorkSource office

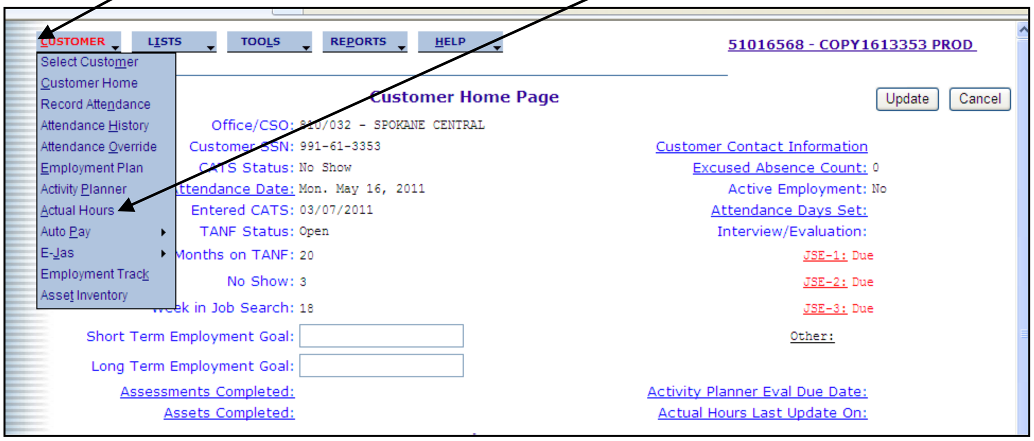
  or
- When the participant leaves an employer's business in route to their home as their last activity

Name (Print):		JAS ID:	Remember to include your travel time		Date:
	Activity or Employer Name Complete Address or Web Address	Contact Type (Check one) Phone Number or e-mail address	Job I applied for/ Who I Talked To or My Activity Instructor	How I Applied What Happened	Activity & Travel Time

Calculate on the participant's completed Job Search Log the actual hours of participation for each day. Include and record the total hours in the Activity & Travel Time Section even if they exceed the required daily hours of participation.

> Remember – Enter actual hours in CATS for every participant weekly.

Select the **Customer Tab.** Then select the **Actual Hours Option** in the drop down menu.



Excused and Holiday Hours

Excused absence means the participant has called in or has arranged to be absent from job search. Unexcused means the participant fails to call in or arrange to be excused from job search (no show, no call).

- Talk with the participant about participation after **each** excused absence and document in eJAS notes.
- Talk with the participant after **each** unexcused absence and document in eJAS notes.
  - After the **second** excused or unexcused absence in a **month**.
  - Speak with the participant about participation
  - Notify the DSHS case manager
  - Consider setting up a CAP

- If you can't connect with the DSHS case manager and the participant continues to no show, close the JS and refer the participant back (RB). In the eJAS note, list the reasons for the RB and any recommendations for other activities.

Example:

Day one	Participant no shows	You try to call them. You get no answer on their home phone so you leave a voice mail. Document in eJAS notes	Unexcused absence
Day two	Participant no shows, no response	You try to call them. You get no answer on their home phone so you leave a voice mail. Document in eJAS notes	Unexcused absence
Day three	No show, no response from participant	Still no response from participant Contact DSHS case manager	Unexcused absence
Day four	No response from participant No response from DSHS	Enter a CAP note detailing why you will refer back the participant and list possible other activities. Complete the RB process.	Unexcused absence

Remember - Use the Unexcused/ Excused Absence List in CATS to enter the CAP note.

The number of hours allowed for Excused days or Holidays cannot exceed the number of hours the participant is required to participate each day.

Required Hours of Participation	Maximum Excused or Holiday Hours
7 hours per day	7 hours per day
4 hours per day	4 hours per day

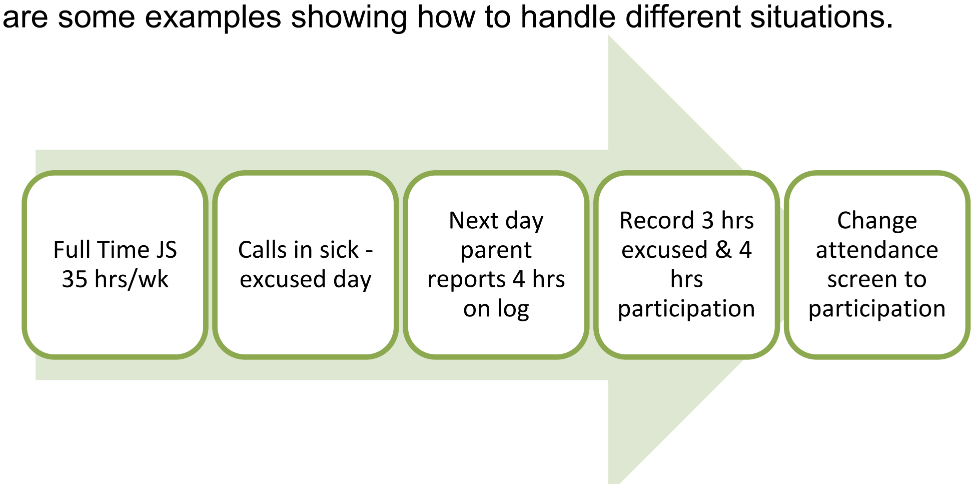
On these days the total number of hours you can credit to the participant (Excused or Holiday hours plus participation hours) cannot exceed the number of hours the participant is required to participate each day.

Required Hours of Participation	Maximum Excused or Holiday Hours **+ Participation Hours**
7 hours per day	7 hours per day
4 hours per day	4 hours per day

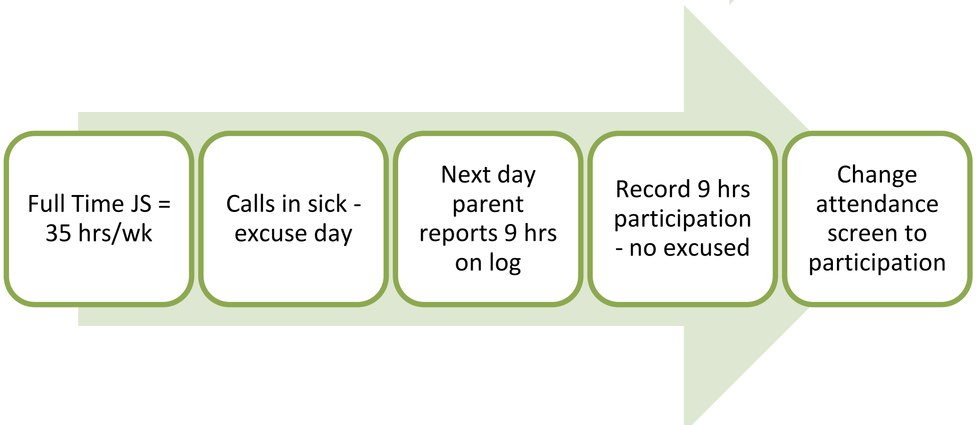
If a participant provides a Job Search log on a day they had called to be excused and it meets or exceeds their required participation for that day, do not record the hours as excused. Record these hours as participating to the maximum allowed per day. Remember to change the Attendance History screen in CATS from excused to participating.

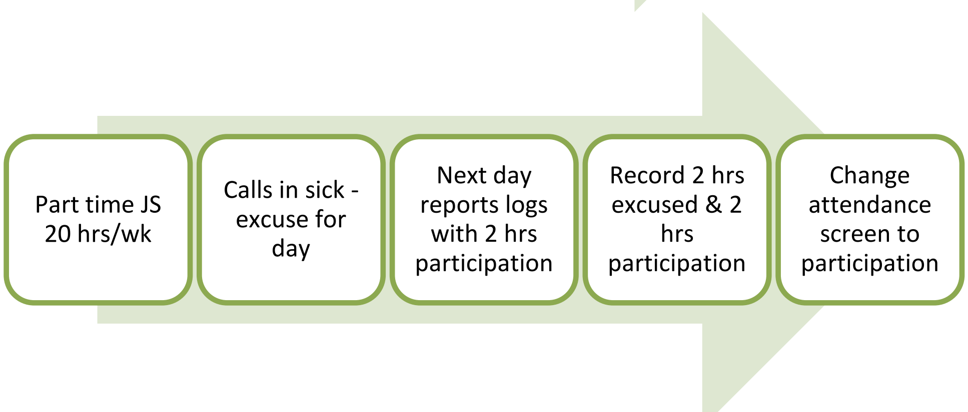
NOTE: We will go over the steps for entering Actual Hours in CATS in the section on Using Automated Systems.

Here are some examples showing how to handle different situations.

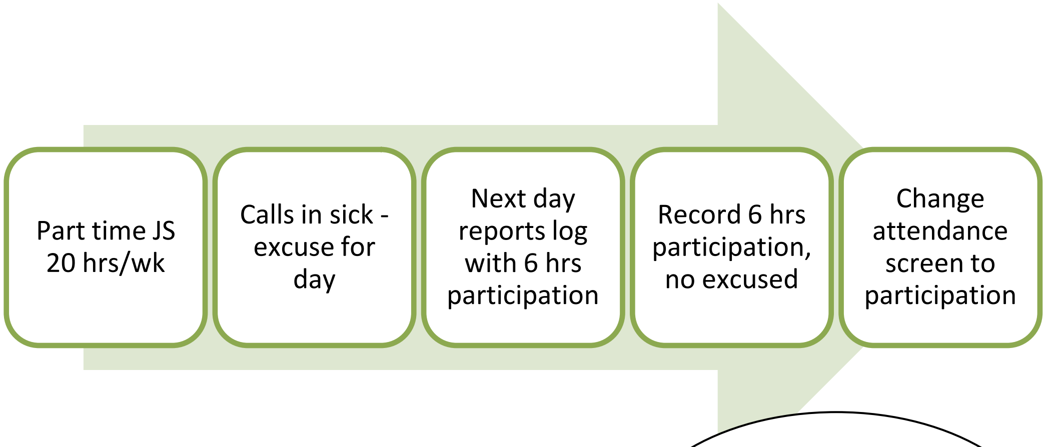


Job Preparation/Job Search





Job Preparation/Job Search



Determine and record Holiday Hours exactly the same.

Remember – On any day that is **<u>not</u>** an Excused Day or a Holiday, the participant can go over the required hours and you can record them in actual hours.

Job Matching and Making Good Job Referrals

Job matching involves finding the right fit of job seeker to job opening. This involves:

- Determining if the participant has the specific skills required for the job
- Preparing participant by identifying the employer's expectations

Screening Criteria:

- Essential job functions
- Applicant's skill, knowledge, ability
- Working conditions
- Standard equipment used on the job
- Interpersonal skills
- Education requirements

How do you determine if the participant is suitable?

- Review job requirements
- Review job seeker information
- Decide if there is a match

When you make a referral for a job not listed in SKIES or go2worksource.com, record it in SKIES.

SKIES Documentation
Job Seeker/Seeker Services/Core/Employment Referral

OJT/WEX are other possible options for WorkFirst participation, see "OJT/WEX" on page 158.

Full Time Employment, Part Time Employment and Temporary Employment

Recording Full Time Employment (FT)

- Get employment information – Employer name, address, phone, start date, hourly wage, hours per week, job title).
- Close the JS component in eJAS with an Entered Employment (EE) code.
- Enter the FT component code, hours per week, start date of employment, and your ESD worker ID.
- Using the employment information from the participant, complete the employment screen in eJAS, including the benefits drop down.
- Record employment information in SKIES – Conclude WorkFirst program participation.
- If participant is receiving automatic transportation in CATS update the auto pay to reflect the component change

SKIES Documentation
Seeker Services
    Program Enrollments
        Conclude WorkFirst program

Recording Part-time Employment (PT)

- Get employment information – Employer name, address, phone, start date, hourly wage, hours per week, job title.
- Close the JS component in eJAS with an Entered Employment (EE) code.
- Enter the PT component code, hours per week, start date of employment, go 6 months from the start date as the Scheduled End date and your ESD worker ID
- Using the employment information from the participant, complete the employment screen in eJAS, including the benefits drop down.
- Record employment information in SKIES
- Direct participant to DSHS WFPS to have IRP updated and if there are any changes in participation requirements

Full Time Employment, Part Time Employment and Temporary Employment

What is Temporary Employment?

Temporary employment is a paid unsubsidized job lasting **30 days or less**.
Examples include:

- Temporary employment agencies (such as Manpower, Labor Ready, etc.)
- Casual labor (such as odd jobs for landlord, friends, and relatives)
- Other employers offering temporary employment.
- Temporary can be part-time employment (31 hours per week or less), or full-time employment (32 hours per week or more).
- There is an estimated employment end date of 30 days or less and the employer does not consider the participant a permanent full-time or part-time employee.

> Remember – If temporary employment that lasts more than 4 consecutive dates or reoccurs each week, coordinate with the DSHS WFPS to decide whether the participant is in the appropriate component.

Verification of Temporary Employment Hours:

1. Advise the participant that if they cannot verify temporary employment within 3 business days of ending the Temporary Employment, the day(s) will be considered a "no show" and they may not be excused for temporary employment in the future.

2. Ask participants for employer information. Participants can bring in a Temporary Employment Verification Form, a paystub, or you can call the employer to verify employment. Information required for employment verification must include:

    - Employer's Name
    - Contact's Name
    - Contact Phone number
    - Date of the contact
    - Number of hours worked
    - Dates worked

> Remember - Participant self-statements about employment do not constitute verified employment.

3. Excuse the participant in CATS for Temporary Employment as **"Temporary Employment Unverified"** when a participant calls to be excused for this purpose. Remind participants who don't provide enough detail about the employment to provide the information during their next scheduled day of job search

4. After verifying employment with paystubs, the Temporary Employment Verification Form, or by calling the employer and completing the Temporary Employment Verification Form, change the "Temporary Employment Unverified" in CATS to **"Excused - Temporary Employment Verified."** Enter Hours for Verified Employment as Temporary Employment Hours (not excused or participating). DSHS will enter the hours into ACES.

5. If you can't verify employment, and the participant did not call in to report the absence, leave the "Temporary Employment Unverified" as recorded and treat this time as a "no show." Enter a note in eJAS what actions were taken to verify employment and the participant was advised they were considered a "no show" on that day.

To record Temporary Employment hours in Actual Hours:

1. Use and maintain the Temporary Employment Tracking Log for each participant in temporary employment during a calendar month. Include the following:

   - Participant's Name
   - eJAS ID and Client ID
   - Temporary employment date(s)
   - Employment Date
   - Employer's Name
   - Contact's Name and phone number
   - Date verified and date entered in eJAS
   - Number of hours worked
   - How verified - Temporary Employment Verification Form, Phone Call, or Pay Stubs
   - Signature of verifying ESD worker

Do not enter the Temporary Employment information on the Temporary Employment Tracking Log until after you verify the employment hours.

The number of hours listed in the "Total Number of Hours Worked" column must match the "Employment Date(s)" column.

For example, you verified that the participant worked from 5/10-5/14 for 5 hours per day. Record 5/10 – 5/14 in the "Employment Date(s)" box. Record the "Total Number of Hours Worked" for that row as 25 hours (5 hours per day x 5 days worked).

Employment Date(s)	Name of Employer	Contact Name & Phone #	Date Verified & Date Note Entered In eJAS	Total Number of Hours Worked	How Verified
5/10 – 5/14				**25**	

2. Send the original Temporary Employment Tracking Log to the regional DSHS Hub Imaging Unit (HIU) by the **10th** of the month following the employment month being recorded. DSHS will image the documents into the DMS system and record the employment hours in ACES using the historical entry of employment hours process

   - Attach **each** Temporary Employment Verification Form(s) to a copy of the participant's Temporary Employment Tracking Log. Keep these documents locally for three (3) months past the month in which the Temporary Employment occurred and then send them to the records retention center to archive for 36 months.

Helpful Hint: You can find the forms in this section in the WorkFirst Handbook section 4.2.19

Post Employment Services

ESD provides immediate Post Employment Services to participants who are employed and still on WorkFirst to help them find full-time employment or a better job to exit TANF. These include:

- Opportunities to access training and upgrade skills.
- Mentoring, coaching, and employment counseling.
- Tips on staying employed and increasing wages.
- Career planning.
- Resource information for accessing:
    - Money management classes.
    - Work Skills Assessment
    - Labor market information.
    - Community resources such as food banks, Utilities Assistance, and Community Action programs.
    - Earned Income Tax Credit (EITC)

Using Reports

SKIES Reports

WorkSource Management Information System (WSMIS) reports are found in SKIES under Reports/WIMIS.

CATS Reports

Actual Hours Entered - This CATS report tracks daily, the entries made on the actual hours screen and compares them with the required hours of participation based on the number of days the participant has been in JS. The calculation will either return a positive or negative figure.

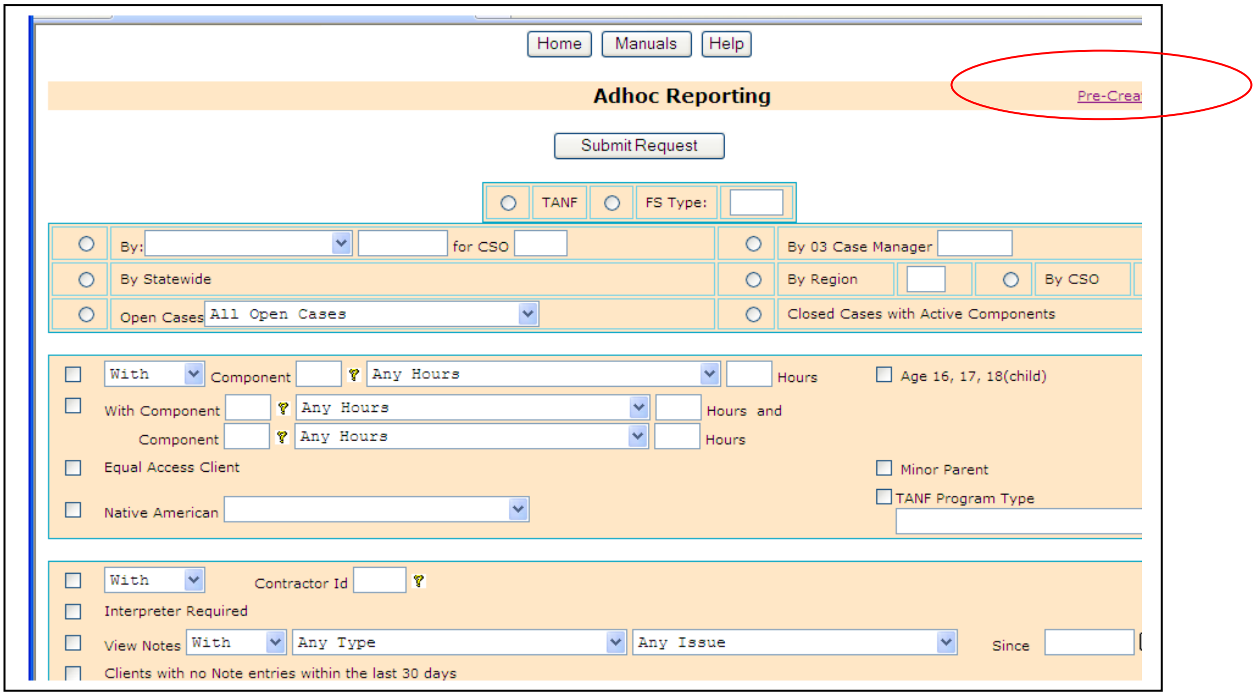
On The Job Training - This is a read-only report of customers who are in an ESD managed OT component for the time period selected.

Work Experience - This is a read-only report of customers who are in an ESD managed WE component for the time period selected

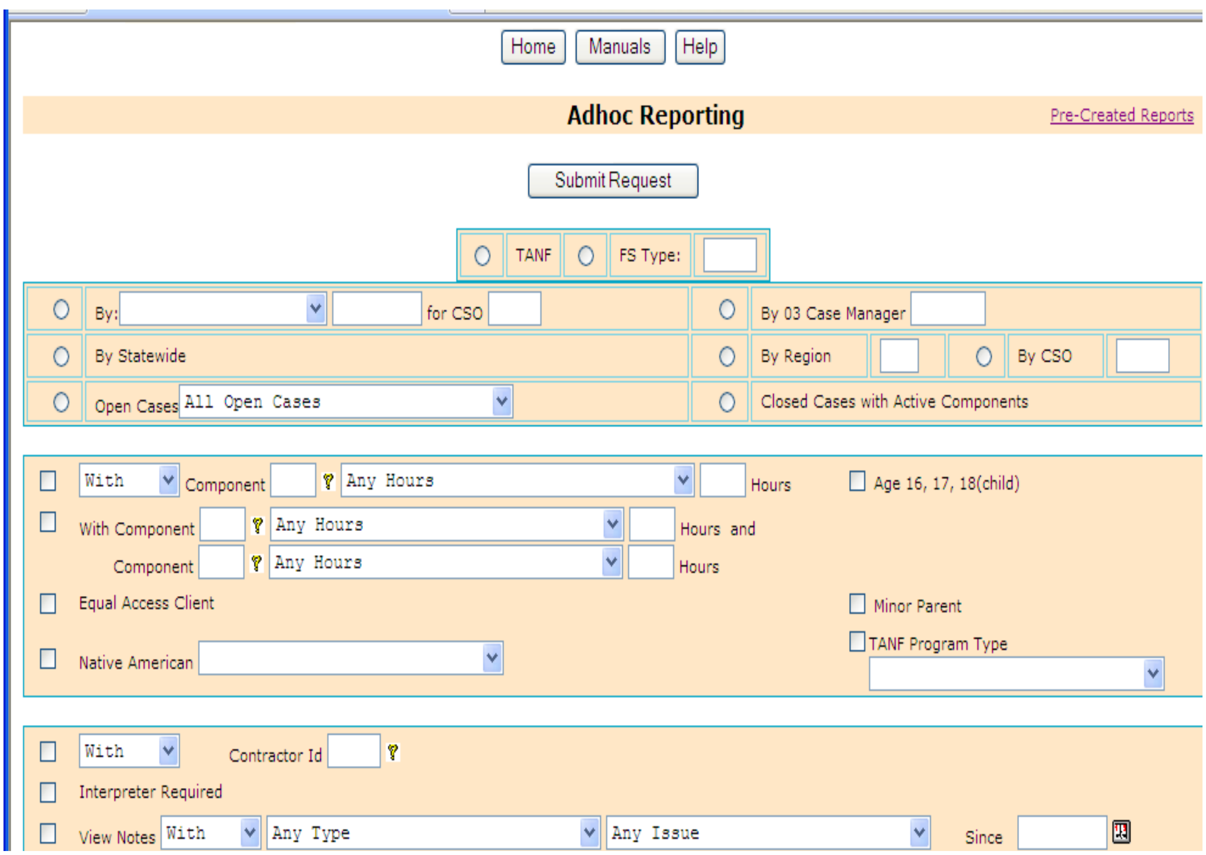
Actual Hours Roll-up

eJAS Reports

Adhoc Report: Allows you to identify specific components and time-periods for a region or office to review. Example: You could find everyone in a JS component. You can also identify Overdue components.



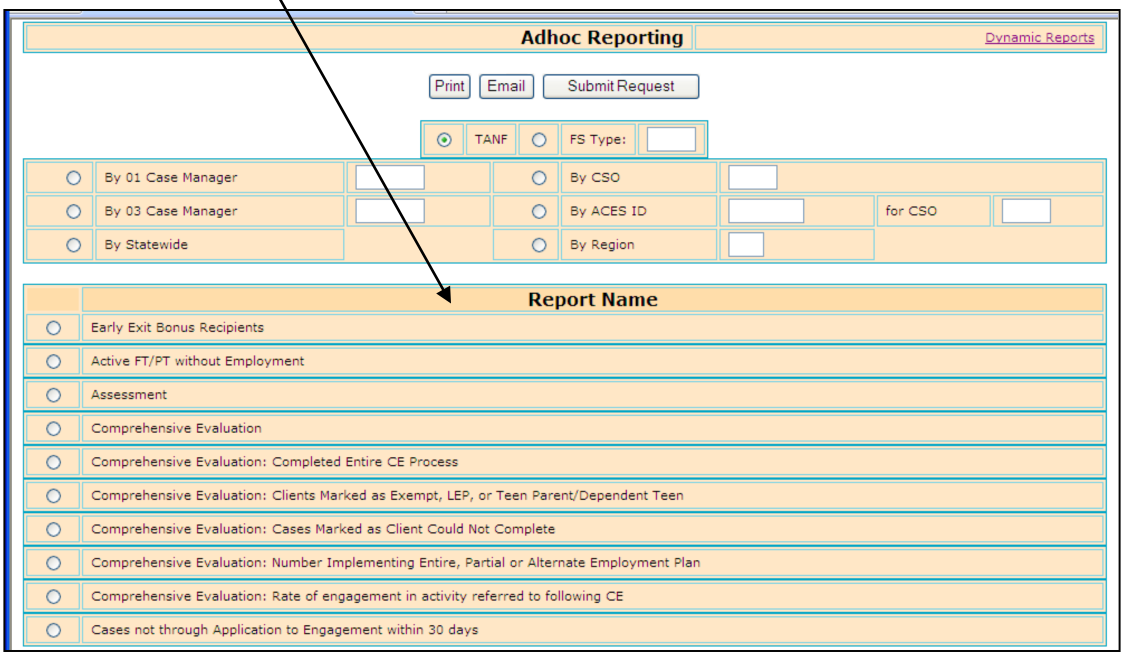
Pre-Created Reports: This function provides detailed information primarily for the Comprehensive Evaluation and is available from the Adhoc Reporting Screen.



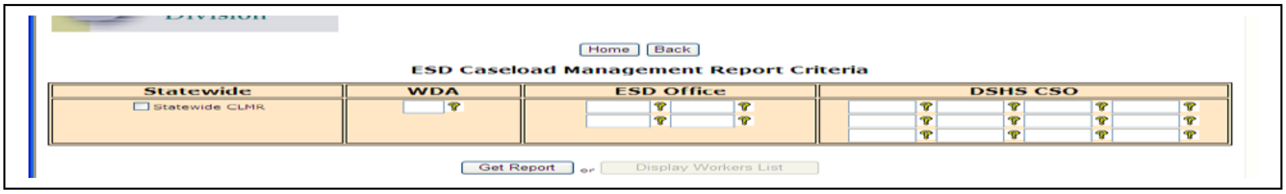
You can view specific areas on the Pre-Created Report to determine management approaches to improve services delivery.

WorkFirst Reports Menu is accessible through CATS or eJAS.

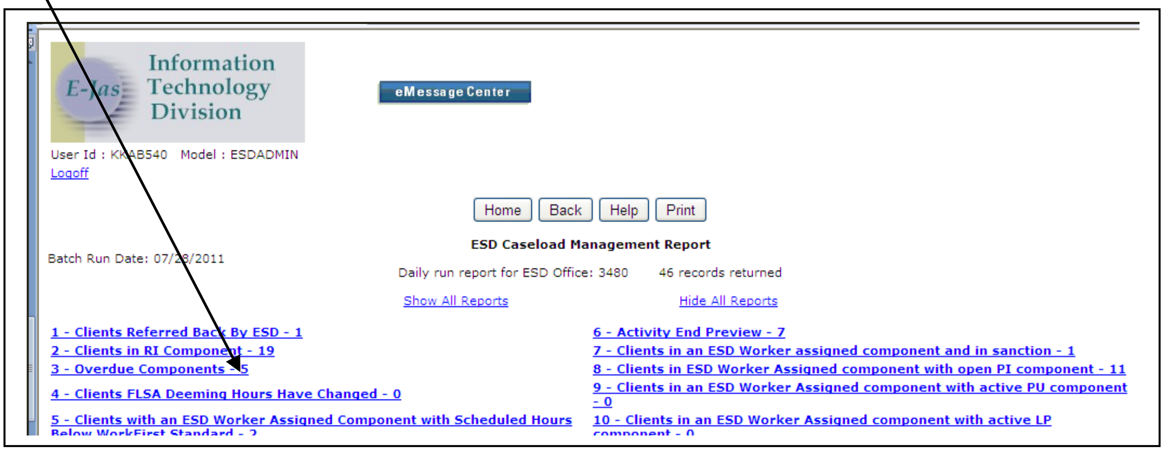
Select WorkFirst Reports menu



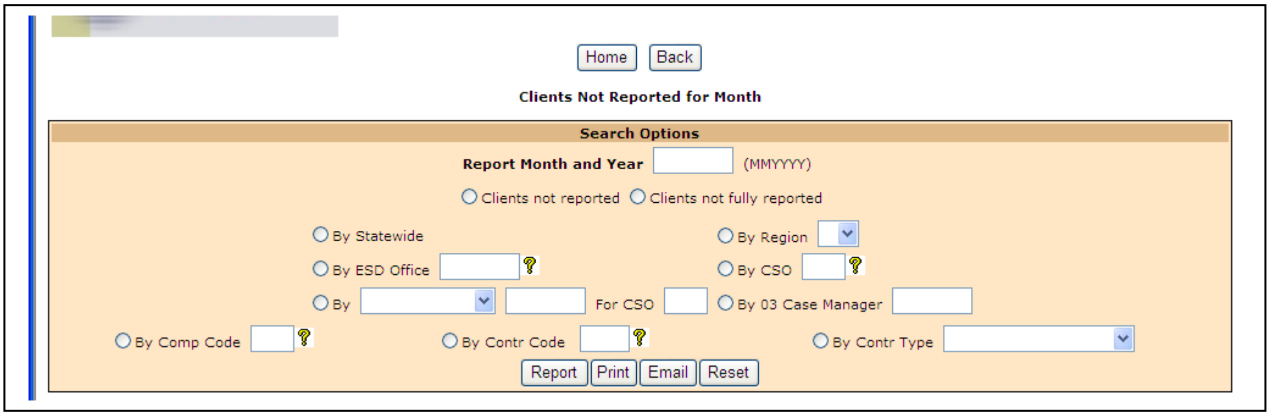
ESD WorkFirst related information is in items 3



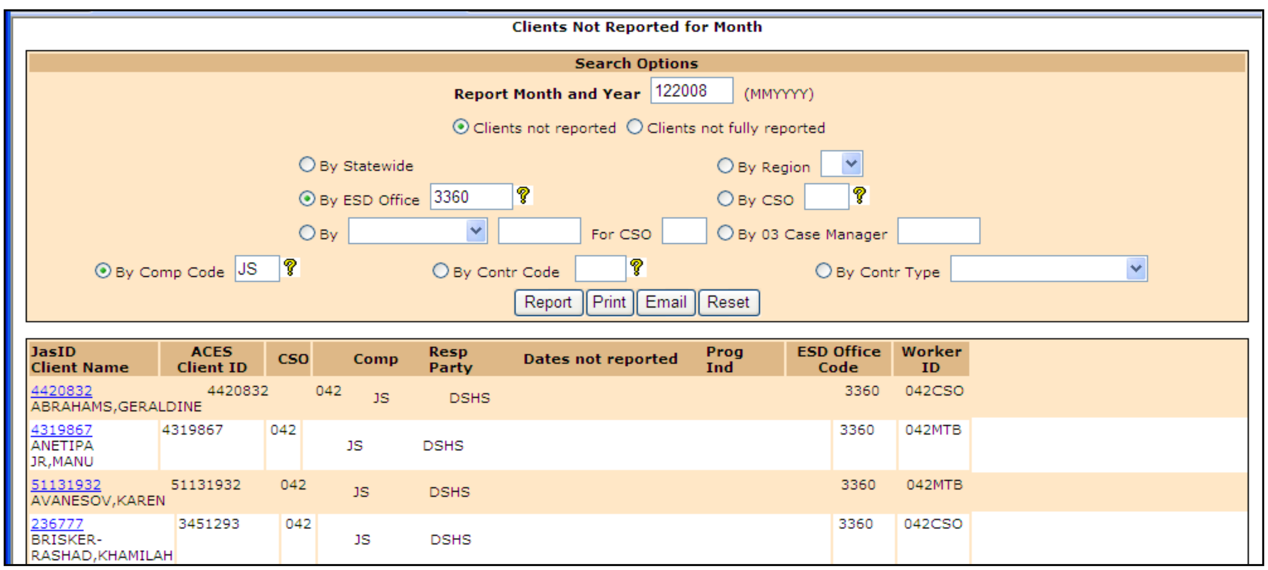
Once you select an office, you are provided a menu to choose from to view the specific participants in each category. Example: Viewing the “Clients in the RI Component” will let you know who was placed in RI the date before. These participants are the ones you should see on the day the report is run.



Clients Not Reported For The Month: This information is available in CATS as the "Actual Hours Required List." This report in eJAS, as in CATS, shows participant's who are missing dates reported during the timeframe the component is open during a month. Information is available for the current month and the two previous months.

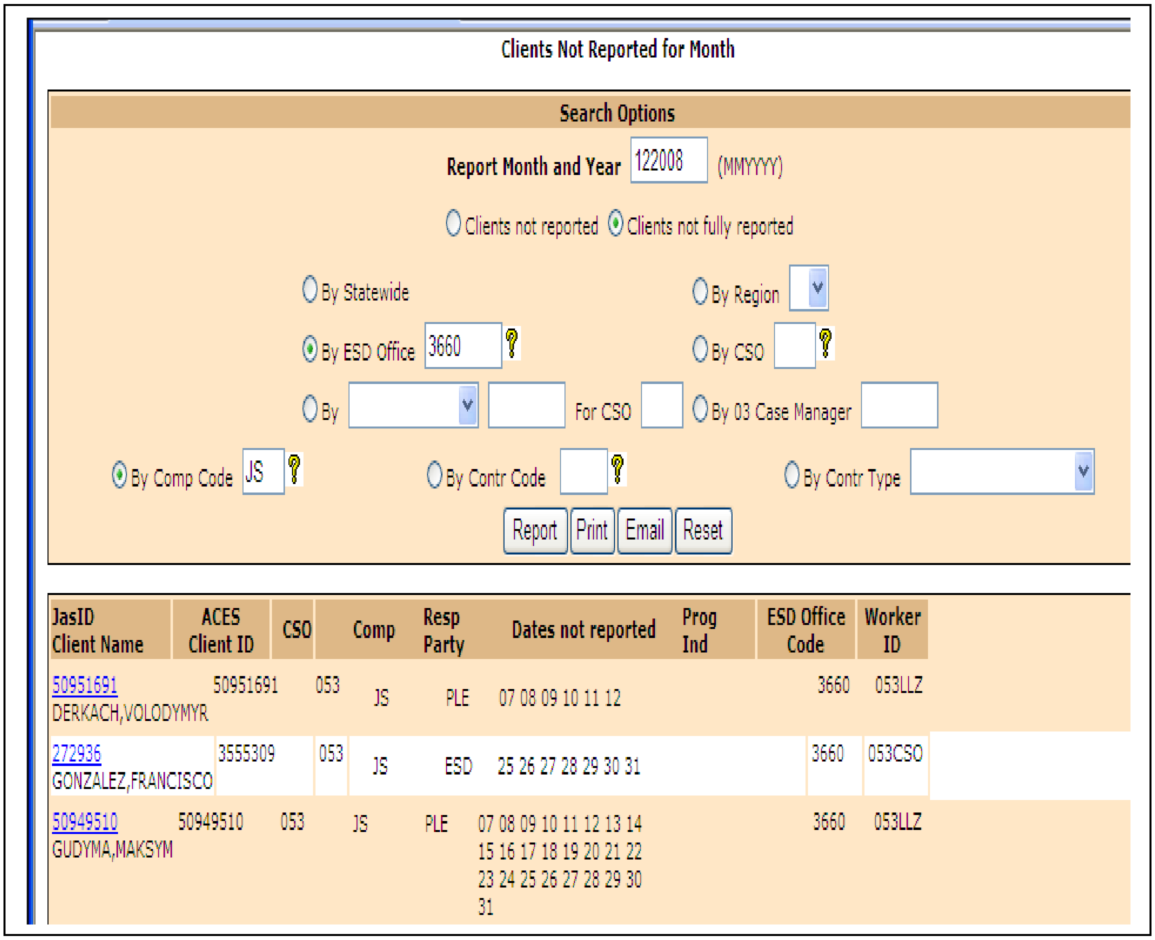


The report provides many options for viewing the information. The report is primarily used to view clients who are not reported at all or clients who are not fully reported. Not reported means no days are recorded for the time period during the month selected. Not fully reported means there are days missing during the time period for the month. Days missing or not reported could mean not all the participant's hours are reported. The report also indicates the responsible party for reporting the hours.



JasID Client Name	ACES Client ID	CSO	Comp	Resp Party	Dates not reported	Prog Ind	ESD Office Code	Worker ID
4420832 ABRAHAMS,GERALDINE	4420832	042	JS	DSHS			3360	042CSO
4319867 ANETIPA JR,MANU	4319867	042	JS	DSHS			3360	042MTB
51131932 AVANESOV,KAREN	51131932	042	JS	DSHS			3360	042MTB
236777 BRISKER-RASHAD,KHAMILAH	3451293	042	JS	DSHS			3360	042CSO

The “Clients not fully reported” option displays the exact dates that have not been recorded on the participant’s actual hours screen. To be removed from the report, you need to enter the missing days on the participant’s actual hours screen. Actual hours of participation may need to be recorded also.



Clients Not Reported for Month

Search Options

Report Month and Year 122008 (MMYYYY)

Clients not reported   Clients not fully reported

By Statewide   By Region

By ESD Office 3660   By CSO

By   For CSO   By 03 Case Manager

By Comp Code JS   By Contr Code   By Contr Type

Report   Print   Email   Reset

JasID Client Name	ACES Client ID	CSO	Comp	Resp Party	Dates not reported	Prog Ind	ESD Office Code	Worker ID
50951691 DERKACH,VOLODYMYR	50951691	053	JS	PLE	07 08 09 10 11 12		3660	053LLZ
272936 GONZALEZ,FRANCISCO	3555309	053	JS	ESD	25 26 27 28 29 30 31		3660	053CSO
50949510 GUDYMA,MAKSYM	50949510	053	JS	PLE	07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31		3660	053LLZ

JAS Reports:

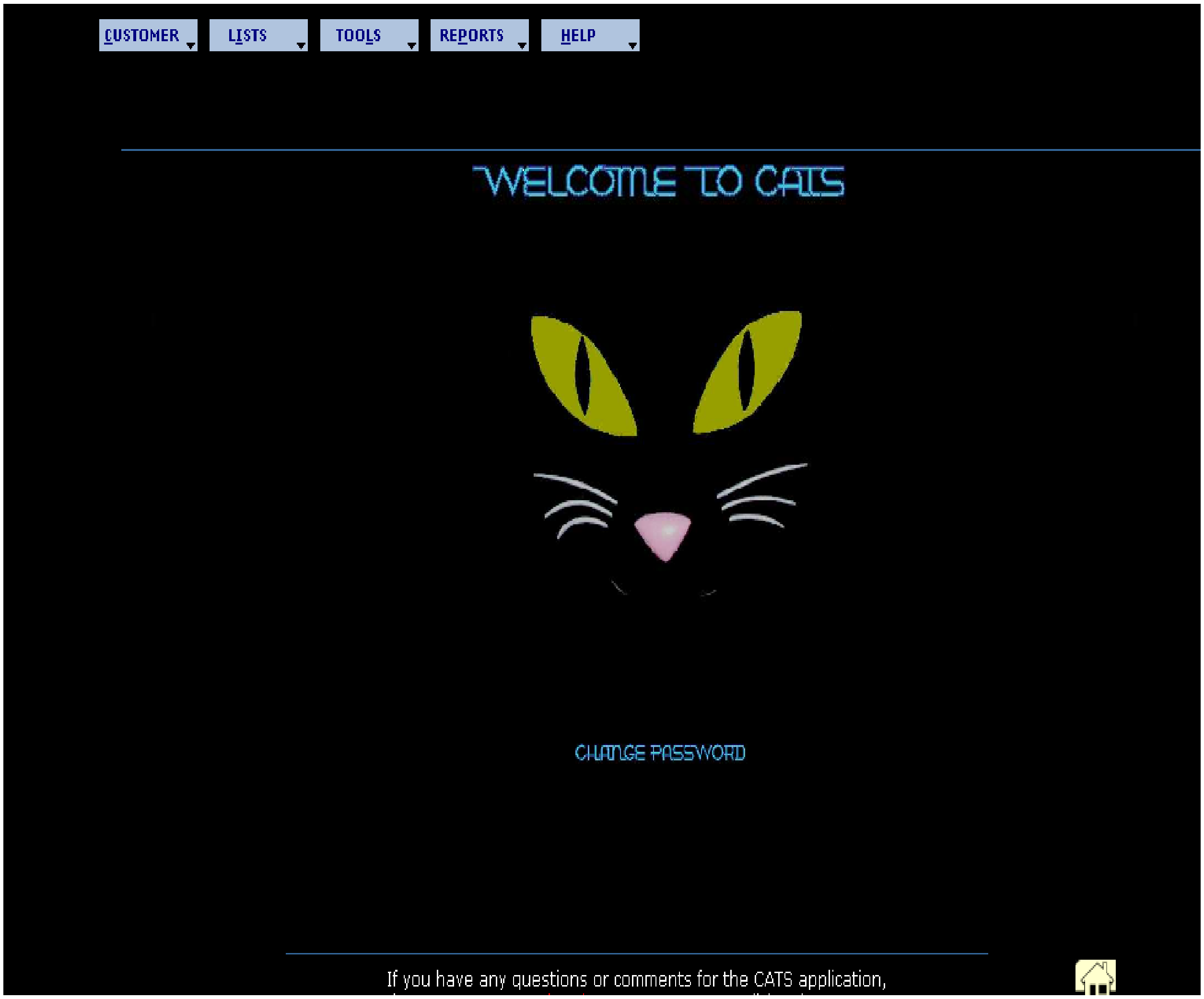
- Unpaid Voucher Report
- Unpaid Voucher Report for Vendor (Letter)
- Outstanding Obligation Report

The WorkFirst Internal Controls Manual provides complete information on JAS reports.

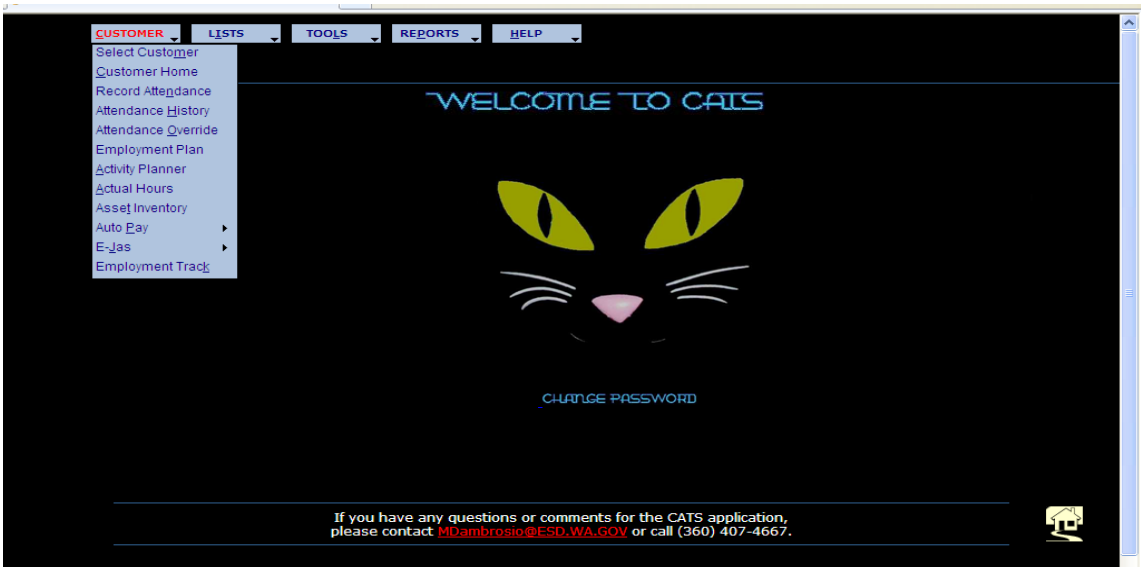
Internal Controls

Use the Internal Controls Manual on Inside WorkFirst to find complete up-to-date information on all internal controls policies and procedures.

CATS (Customer Automated Tracking System)



Customer



Select customer

To work with or record information about a Customer in CATS, you must first **Select a Customer**. Customers can be selected by their JAS ID, SSN, or name.

Select By JAS ID:

1. Click on **Select Customer** on the Customer tab.
   This will display the Customer Selection screen. Notice that the JAS ID radio button is already selected (by default) and that your cursor appears in the dialogue box.
2. Enter the desired **JAS ID** number.
3. Click on the **Select** button.
   The Customer's JAS ID and name are now displayed at the top right-hand corner of the screen. NOTE: Clicking on the Customer's JAS ID and name will display the Customer Home Page.

Select By SSN:

1. Click on **Select Customer** on the Customer tab.
   This will display the Customer Selection screen.
2. Click on the **SSN radio button**. Your cursor appears in the dialogue box.
3. Enter the desired **SSN.**
4. Click on the **Select** button.
   The Customer's JAS ID and name are now displayed at the top right-hand corner of the screen.
   NOTE: Clicking on the Customer's JAS ID and name will display the Customer Home Page.

Select By Name:

Three search filters may be used when searching for a customer by name. They are:

- All CATS Customers in a specific ESD Office
- All Customers in CATS and
- All Customers in eJAS

1. Click on **Select Customer** on the Customer tab.
   This will display the Customer Selection screen.
2. Click in the dialogue box to the right of **Last Name:**
3. Enter the Customer's **Full Last Name** <u>or</u> **Part of the Last Name** <u>or</u> **First Initial of the Customer's First Name**.
4. Click on the **Find** button.
   All names that match the selection criteria are displayed.
   <u>NOTE</u>: The default search filter looks for a customer by a specific ESD office. If no customer is found for your search criteria, search again by selecting one of the other two search filters, <u>All Customers In CATS</u> or <u>All Customers In eJAS.</u>
5. Click on the scrolling **Up** or **Down** buttons to find your customer.
6. Double click on the desired **Customer Name**.
   The Customer's JAS ID and name are now displayed at the top right-hand corner of the screen. Clicking on the Customer's JAS ID and name will display the Customer Home Page.

Review the Home Page

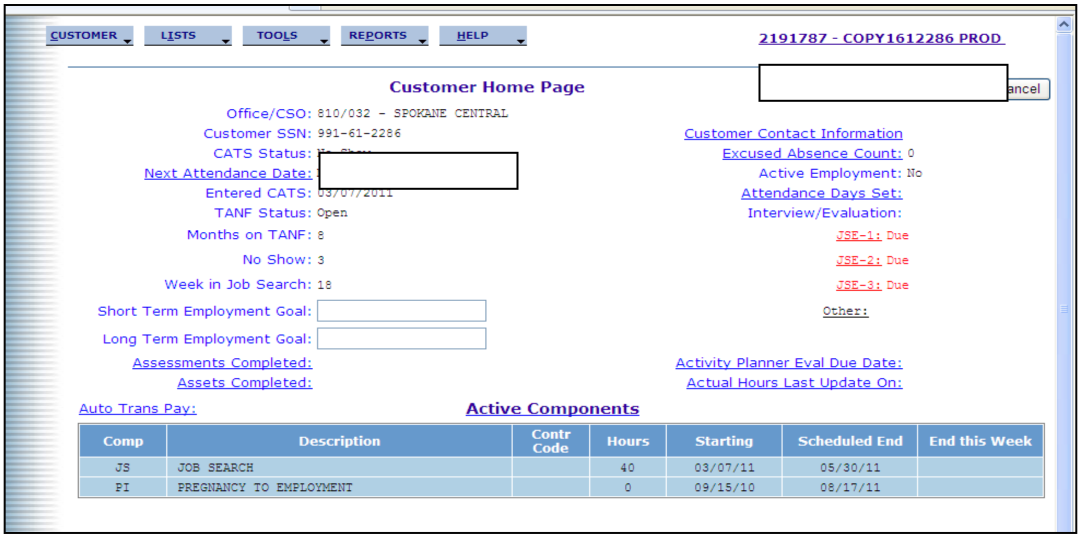
- Click **Customer Home** on the Customer tab <u>or</u> click on the underlined **Customer Name** at the top right-hand corner of the screen.
  This will display the Customer Home Page with the following information and links:
- **Office and CSO -** ESD office and DSHS CSO the Customer is attached to.
- **Customers SSN -** Customer's social security number.
- **CATS Status** - status for the most recent attendance record on the Attendance History screen.
- **Next Attendance Date -** date the Customer is to report in next.
- **Entered CATS -** date the most recent JS component was entered on the Component screen in eJAS.
- **TANF Status -** current status of the Customer's TANF case.
- **Months on TANF** - number of months the Customer has been on TANF.
- **No Show -** number of no-shows for the current month and most recent Job Search component (no-show count reset monthly).
- **Week in Job Search** - current week of the Customer's job search efforts.
- **Short Term Employment Goal** – short term occupational goal.
- **Long Term Employment Goal** – long term occupational goal
- **Assessments Completed -** date the Work Skill Assessment was check as completed.
- **Assets Completed -** date all the Job Search Assets were checked as completed.

- **Customer Phone Number** - field used to enter the Customer's most recent phone number
- **Excused Absence Count** - total number of excuses since the most recent JS started
- **Active Employment** - display a YES if there is an active employment record in eJAS on the employment screen. Display a NO if there is not an active employment record.
- **Attendance Days Set** - displays the days of the week a Customer is to report in.
- **Interview/Evaluation -** displays when interviews/evaluation are due or when they have been done (since the start of the most recent Job Search component).
- **Active Components** - displays all the active components listed in eJAS.
- **Auto Trans Pay** - when automatic transportation is set the following information will be displayed:
    - **U** for urban
    - **R** for rural
    - **I** for immediate pay
    - Two digit code for the component auto pay has been set for.
    - The date auto pay was set.

Home Page Links

All items underlined on the Customer Home Page will link to another screen.

- **Next Attendance Date** - links to the Record Attendance screen where staff can sign in or excuse a Customer.
- **Occupational Goal** - links to the Employment Plan List screen.
- **Assessments Completed** - links to the Asset Inventory screen.
- **Assets Completed** - links to Asset Inventory screen.
- **Excused Absence Count** - links to the Attendance History screen filtered to display only the excused absences. The filter can be reset to display different types of excused absences.
- **Active Employment** - links to the active employment screen in eJAS when there is an active employment record.
- **Attendance Days Set -** displays the days of the week a Customer is to report in.
- **Interview/Evaluation** - linked to the Customer Interview screen.
  ☐ Complete the bi-weekly evaluation in the Activity Planner evaluation. - linked to the eJAS note entry with the completed evaluation.
- **Active component** - linked to the Active Components in eJAS.
- **Auto Trans Pay** - linked to the Auto Pay Request History screen.
- **Mouse icon** - linked to the CATS Welcome screen.



Attendance/Excuse Absence

Record Attendance

The Record Attendance screen is used to record or excuse attendance for a Customer.

1. Click on **Record Attendance** on the Customer tab.
   This will display the Record Attendance screen. The Next Attendance Date box will auto-fill with the date the customer is to report in next.
2. Under **Activities**, check the activity box that the Customer is reporting in for:
   - Resource Room/ Job Search - Most common sign in activity, highlighted in red
   - Job Club
   - WorkFirst Job Search Workshop
   - Returner's WorkFirst Workshop
3. Click on the **Sign In** button.
   The following message appears:
   You have recorded attendance for (Customer name); Their Next Attendance Date is (for example) Friday, August 15, 2003.
   - NOTE: Occasionally an additional message will display in this box saying **Customer Scheduled For A Required Interview.**
     - For offices requiring the interview to be completed before the Customer can be signed in, clicking on the **OK** button on the message screen ends the process and no attendance history record is created. Go to either the Customer Home Page or the Customer Interview screen to record the required interview. Once the required interview is done, complete steps 1-4 in order to record attendance.

       IMPORTANT: Failure to record attendance after completing the required interview will cause the customer to be recorded as a no-show.

  - For offices <u>not requiring</u> the interview to be completed before the Customer can be signed in, clicking on the **OK** button displays the following message:
    You have recorded attendance for (Customer name), Their Next Attendance Date is Friday, August 15, 2003.

4. Click on the **Finish** button to complete the action.
   The Attendance History Screen now displays the date and time of sign in plus the Customer's attendance status as participating.

   <u>NOTE</u>: When a Customer is not required to sign in, one of the following system messages appears:

   - Customer cannot be signed in as no Open J component exists.
   - Tribal/LEP program not required to sign in to CATS system.

   Clicking on the **OK** button on the message screen ends the process and no attendance history record is created.

Excuse Absence (One Day Only)

1. Click on **Record Attendance** on the Customer tab.
2. Click on the **Down Arrow** to the right side of the box entitled **Excused Absence**. This will display a list of possible excuses**.**
3. Click on the **Appropriate Reason** for the excuse.
4. Under **Activities**, check the activity box that the Customer <u>would have been</u> reporting in for (must select one):
   - Resource Room/ Job Search - Most common sign in activity, highlighted in red
   - Job Club
   - WorkFirst Job Search Workshop
   - Returner's WorkFirst Workshop
5. Click on the **Sign In** button.
   The following message appears:
   You have recorded attendance for (Customer's name). Their Next Attendance Date is Friday, August 15, 2003.
   <u>NOTE</u>: Occasionally an additional message will display in this box saying **Customer Scheduled For A Required Interview.** This message will not prevent the recording of the excuse.
6. Click on the **Finish** button.
   The Attendance History Screen now displays the date and time of sign in, the Customer's attendance status as excused, plus the excuse reason.

Excuse Absence (Multiple Days)

1. Click on **Record Attendance** on the Customer tab.
2. Click on the **Down Arrow** to the right side of the box entitled **Excused Absence**. This will display a list of possible excuses.
3. Click on the **Appropriate Reason** for the excuse.
4. Click the **Calendar** button to the right of the box entitled **Next Attendance Date**. This will bring up a calendar.
5. Click on the **Date** you want for the Customer's **Next Attendance Date**. The system will enter the date chosen into the Next Attendance Date box.
6. Under **Activities**, check the activity box that the Customer would have been reporting in for (must select one):
   - Resource Room/ Job Search - Most common sign in activity, highlighted in red
   - Job Club
   - WorkFirst Job Search Workshop
   - Returner's WorkFirst Workshop
7. Click on the **Sign In** button.
   The following message appears:
   You have recorded attendance for (Customer's name). Their Next Attendance Date is Friday August 15, 2003.
   NOTE: Occasionally an additional message will display in this box saying **Customer Scheduled For A Required Interview.** This message will not prevent the recording of the excuse.
8. Click on the **Finish** button.
   The Attendance History Screen now displays the date and time of sign in, the Customer's attendance status as excused, plus the excuse reason.

Attendance History

View Attendance History

1. Click on **Attendance History** on the Customer tab.
   The Attendance History screen displays a record for each day that a Customer was required to report in. It begins with the most recent attendance date and includes the following fields:
   - Attend Date and Time – when the record was created (displayed in real time).
   - Status - Customer's attendance status for that particular day and time.
     - No Show – Customer failed to sign in or be excused.
     - Participation - Customer signed in or was signed in.
     - No Open J – Customer signed in with no active JS component in eJAS.
     - Override - An override was entered that day for the Customer.
     - Excused – Customer not required to attend that day.
     - RB'd Non Participation – Customer failed to show three times in a calendar month.
     - Closed RI/Opened JS Component – CATS closed the RI (when Customer signed in) and opened the JS component.
     - System restore - displayed when a CATS RB has been restored.
     - Tribal affiliated - Tribal member has signed-in.
     - Contracted JS - a customer attached to a contractor has signed-in.
     - Food Stamps - a Food Stamp customer has signed-in.
     - No Show LEP - a LEP customer has failed to signed-in.
   - Override/Excused Description – reason for the override, the excuse, or the RB.
   - Open J Component – Displays JS for job search.
   - Activity – Two digit code for the activity the customer signed in or was signed in for.

Filter Attendance History

1. Click on **Attendance History** on the Customer tab.
2. Click on the **Down Arrow** to the right of the box entitled **Filtered By**.
   This displays a drop-down menu for filtering the Attendance History screen.
3. Click on the desired **Status** to filter by from the drop-down menu.
   NOTE: Only records meeting the status chosen for filtering will be displayed.
4. Click on **None** to return to the complete list of Attendance History records.

NOTE: Leaving the Attendance History screen resets the filter to **None**.

Review An Attendance Record

1. Click on **Attendance History** on the Customer tab.
2. Click on the **Up** or **Down** scroll buttons (or click and drag the scroll bar to the right of your screen) to locate the Attendance Record for review.
3. Click on the **Select** box to the left of the Attendance Record for review. A pop-up menu displays the options available for each line in the history screen.
4. Click on **Review** - the Attendance Detail screen is displayed.
5. Review the **Attendance Details** for the date in question.
6. Click on the **Back** button to return to the Attendance History screen.

Update Attendance

Coach- only able to change a no –show to excused or change an excuse reason

1. Click on **Attendance History** on the Customer tab.
2. Click on the **Up** or **Down** scroll buttons (or click and drag the scroll bar to the right of your screen) to locate the Attendance Record for updating.
3. Click on the **Select** box to the left of the Attendance Record for updating. A pop-up menu displays the options available for each line in the history screen.
4. Click on **Upd Hist** from the pop-up menu.
   This displays the Update Attendance History screen with a drop-down box for the excuses.
5. Click on the **Down Arrow** to display the different choices for excuses.
6. Click on the **Excuse** desired.
7. Click on the **Down Arrow** to the right of the Status box to display excused status.
8. Click on the **Update** button.
9. Click **OK** on the confirmation box.

The excuse reason is displayed in the Override/Excused Description column.

Abbreviations Used On The Attendance History Screen

- No- show = NS
- Participating = PT or partcpt
- Excused = EX
- Participating LEP = PL
- No- show LEP = NL

Set Attendance Requirements

Set Attendance

NOTE: Customers in job search are required to participate daily unless their case manager has granted them an exception. The case manager determines what days the Customer is to participate and enters this information on the Individual Responsibility Plan (IRP) in eJAS. From this information, ESD staff set the attendance requirement.

1. Click on **Attendance Override** on the Customer tab.
   This will display the Set Attendance Requirements screen. If the requirements have previously been set, the day(s) of the week the customer is to participate are displayed.
2. Click on the **Down Arrow** to the right of the box entitled **Reason**.
   This will display the reasons for setting the attendance requirements.
3. Click on the appropriate **Reason** for the attendance.
4. Click on the **Day(s)** of the week the Customer is to participate.
5. Click on the **Update** button.
   This will display a box with the following message:
   "Attendance has been set, Customer due to report in: (for example) M, W, F
   Next Attendance Date is: (for example) Friday May 20, 2005."
6. Click on the **OK** button on the pop-up screen to complete the process.
   This will create an attendance history record.
   NOTE: This action also signs the customer in and changes their Next Attendance Date.
   NOTE: To view the current reason the attendance was set to, go to the Attendance History screen and filter the list by "Set Attendance

Interviewing a Customer

Customer Interview

Once a Customer enters their 4, 8 or 12th week of job search, or has two (2) excused absences, CATS adds their name to an interview/evaluation due list. CATS displays a red indicator on the **Customer Home Page** for Customers such as these. Staff may need to interview a customer for other reasons as well. The **Other** interview text box has been added for this purpose.

Complete a bi-weekly evaluation

A bi-weekly evaluation are required to be completed at the bottom of the Activity Planner, this should be done face to face with the participant.

Complete 2 Excused Absences

1. Click on the **Excused Absence Due** link on the Customer Home Page.
   This will display the new Excused Absence Interview pop-up box.
2. Enter the text for the note you wish to save on the eJAS Note screen in the pop-up box.
3. Click the **save** button. This will save the note and send it to eJAS.
4. The Excused Absence Interview Due Link on the Customer Home Page will change from Due to Completed. The date of the completed interview will display to the right of the word completed. The 2 Excuse Absence Counter is increased by 1. The customer's name is removed from the Interview Due List.

To view the completed note click on **Excused Absence Completed link**

Create a Request For The Other Interview

1. Click on **Customer Home Page** on the Customer tab.
   This will display the Customer Home Page screen.
2. Click on **Other** at the bottom right-hand side of the Customer Home Page.
   This will display and Other interview text box.
3. Enter the reason for the Other Interview in the text box Click on the **Update** button to set the Other Interview request.
   This will display a pop-up box with the following message:
   Customer Interview Updated Successfully
4. Click on the **OK** button on the pop-up screen to complete the process.
   The Customer’s name is added to the Interviews Due list. The Customer now gets the message to see a WorkFirst Specialist when signing in. The message remains until the Other Interview is completed.

Create a Request For The Other Interview For A Future Date

1. Click on **Customer Home Page** on the Customer tab.
   This will display the Customer Home Page screen.
2. Click on **Other** at the bottom right-hand side of the Customer Home Page.
   This will display an Other interview text box.
3. Click on the **Calendar** icon to the right of the Interview Date box. Select the date you want the Customer to report for an interview.
4. Click on the **Update** button to set the Other Interview for a future date.
   This will display a pop-up box with the following message:
   Customer Interview Updated Successfully
5. Click on the **OK** button on the pop-up screen to complete the process.
   The customer's name is added to the Interviews Due list, however, the indictor on this list will not appear until the interview due date. The customer now gets the message they must see a WorkFirst Specialist when signing in. The message remains until the Other Interview is completed.

Complete The Other Interview

1. Click on **Customer Home Page** on the Customer tab.
   This will display the Customer Home Page screen.
2. Click on the **Other Due** at the bottom right-hand side of the Customer Home Page.
   This will display an Other Interview text box.
3. Click on the **Yes** radio button underneath the Interview Date box.
4. Click on the **Update** button.
   This will display a pop-up box with the following message:
   Customer Interview Updated Successfully
5. Click on the **OK** button on the pop-up screen to complete the process.
   This will clear out the text box and remove the Customer's name from the Interviews Due list. The information previously entered in the text box is not stored (saved).

Assessments and Assets Inventory

The customer home page is the hub for displaying the completion of the Assessment and the Asset Inventory.

Complete the Assessment

1. Click on **Assessment** on the Customer tab.
   This will display the **Asset Inventory For**: screen.
2. Click on the **Box** in front of Completed Assessment.
3. Click on the **Update** button.
   This will display a pop-up box with the following message:
   Assessment Updated Successfully.
4. Click on the **OK** button on the pop-up screen to complete the process.

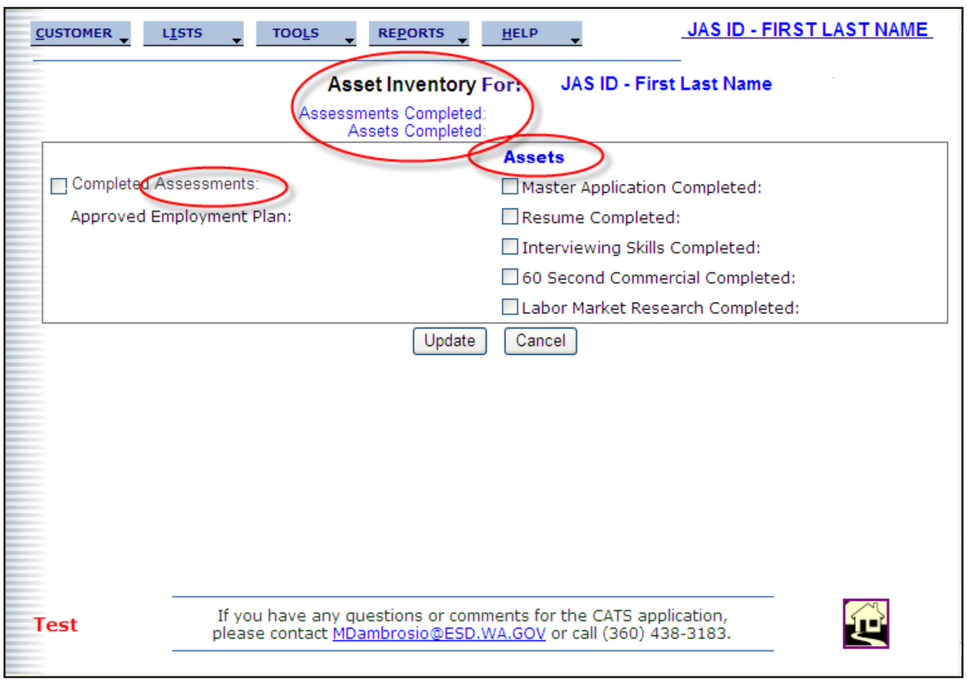
<u>NOTE:</u> The completion date is now displayed next to "Assessment Completed" on the Customer Home Page. This date will remain for 84 days or until a new JS component is opened.

Complete the Asset Inventory

1. Click on Asset Inventory on the Customer tab.
   This will display the **Asset Inventory For**: screen
2. Click on the **Box** in front of any <u>or</u> all of the following Assets:
   - Master Application completed
   - Resume completed
   - Interviewing Skills completed
   - 60 Second Commercial completed
   - Labor Market Research completed

3. Click on the **Update** button.
   This will display a pop-up box with the following message: Assets Updated Successfully.
4. Click on the **OK** button on the pop-up screen to complete the process.
   NOTE: The date each box is checked will now be displayed to the right of the respective asset. The date, when the last of the five competencies is checked, is displayed to the right of the label entitled "Assets Completed." This same date is displayed on both the “Asset Inventory For” screen and the Customer Home Page. This date will remain for 84 days or until a new JS component is opened.

NOTE: The Assessments and Assets can be updated at any time, but they are only valid for 84-days. When any asset date or the assessment date is over 84-days old, that specific asset or the assessment will turn red and the completion date at the top of the page will be removed. When any competency or the assessment appearing in red is updated, it will again turn black. When all assets or the assessment are again within 84-days of the current date, the completion date at the top of the screen will populate to reflect the date the last competency was updated or to display the new Assessment completion date.



Accessing eJAS From CATS

CATS links to the most used eJAS screens for Employment Security users. With the click of a mouse from CATS, ESD users can access the following eJAS screens for a specific Customer (1) Component, (2) Employment, (3) Notes, (4) Letters, and (5) Comprehensive Evaluation. The user can navigate throughout all of eJAS once inside any of these five screens. Employment Security users do not need to log-in separately to eJAS.

Link to the Component Screen

1. Move your mouse over **eJAS** on the Customer tab.
   This will display a drop-down menu.
2. Click on **Active Comps**.
   This opens a new browser window with the eJAS Active Components screen being displayed. Once linked, clicking on either the Home or Main button can access any of the other eJAS screens.
3. Click on the **X** in the top right-hand corner of the eJAS window to return to CATS.
   Note: **Always close the link to eJAS when done with the desired action.**

Link to the Employment Screen

1. Move your mouse over **eJAS** on the Customer tab.
   This will display a drop-down menu.
2. Click on **Employment**.
   This opens a new browser window with the eJAS Active Employment screen being displayed. Once linked, clicking on either the Home or Main button can access any of the other eJAS screens.
3. Click on the **X** in the top right-hand corner of the eJAS window to return to CATS.
   Note**: Always close the link to eJAS when done with the desired action.**

Link to the Notes Screen

1. Move your mouse over **eJAS** on the Customer tab.
   This will display a drop-down menu.
2. Click on **Notes**.
   This opens a new browser window with the eJAS Notes screen being displayed. Once linked, clicking on either the Home or Main button can access any of the other eJAS screens.
3. Click on the **X** in the top right-hand corner of the eJAS window to return to CATS.
   Note: **Always close the link to eJAS when done with the desired action.**

Link to the Letter

1. Move your mouse over **eJAS** on the Customer tab.
   This will display a drop-down menu.
2. Click on **Letters**.
   This opens a new browser window with the eJAS Appointment Letter screen being displayed. Once linked, clicking on either the Home or Main button can access any of the other eJAS screens.
3. Click on the **X** in the top right-hand corner of the eJAS window to return to CATS.
   Note: **Always close the link to eJAS when done with the desired action.**

Link to the Comprehensive Evaluation

1. Move your mouse over **eJAS** on the Customer tab.
   This will display a drop-down menu.
2. Click on **C E**.
   This opens a new browser window with the eJAS Comprehensive Evaluation Summary screen being displayed. Once linked, clicking on either the Home or Main button can access any of the other eJAS screens.
3. Click on the **X** in the top right-hand corner of the eJAS window to return to CATS.
   Note: **Always close the link to eJAS when done with the desired action.**

Auto Pay

Customers can receive up to eight (8) bi-monthly payments while in JS per program year and two payments while in a PT, FT, or OT/WEX.

The transportation payments are to assist customers with the cost of gas to get back and forth to find employment and to help them get to work until they get their first working paycheck. The dollar amount for transportation auto pay is established by WAC and is governed by the WorkFirst budget.

Note:
Immediate Auto Pays are counted toward the 8 payments for the program year.

Payment History

CATS will display all the auto pay payments issued to a customer.

Review payment history

1. Select a **Customer**
2. Move your mouse over **Auto pay** on the Customer tab.
   This will display a drop-down menu.
3. Click on **Payment History** on the drop down menu to display the Payment History screen with the following fields:

- **Py** – program year the payment was made.
- **Process date** – date the batch job was run to create the warrant.
- **Org Index** - the cost center the payment was charged to.
- **Payment type**:
  1. U for urban
  2. R for rural
  3. I for immediate pay
- **Amt** - dollar amount of the warrant.
- **Comp Code** – the 2 digit component code the auto pay was attached to.
- **Canceled**:
  1. Y = yes canceled
  2. blank = not canceled

4. Click on the **Select Box** in front of the payment to be reviewed. This will display a side menu.
5. Click on **Review** from the side menu to display the Payment Detail screen with the following fields:
   - **Customer** – customer's full name and JAS id.
   - **Org Index**- customer's cost center at the time of payment.
   - **Program Year** – program year the payment was made.
   - **Process date** - date the batch job was run to create the warrant.
   - **Type** – type of payment: **U** or urban, **R** for rural and **I** for immediate.
   - **Comp Code** – the two digit component code the auto pay was attached to.
   - **Request user** – the user id of the user that set up the auto pay. For records created prior to the date that auto pay was moved to CATS and the user id was added to the file this will be the default user id for CATS and will start with a dollar sign. I.E. $091300
   - **Amount** - dollar amount of the warrant.
   - **Canceled** – Y for canceled or blank not canceled.
     The section below is only completed if a warrant is canceled
   - **Date Received by WF Admin -** date the warrant was return to the WorkFirst Administrative unit.
   - **Received by** – logon id of the person who received the check.
   - **Warrant Number** – the warrant number of the payment.
   - **Warrant Date** – date the warrant was issued.
   - **Date Canceled** – date the warrant was processed for cancellation.
   - **Canceled by** – the logon id of the person requesting cancellation of the warrant.
     This last section is for all payments
   - **Address** - this is the mailing address that the warrant was mailed to which includes the **City, State** and **Zip code**. The address information is only available for warrants processed since October 2004.

Create/History

Function developed to setup auto pay and to review the auto pay requests.

Review Auto Pay requests

1. Select a **Customer**
2. Move your mouse over **Auto Pay** on the Customer tab.
   This will display a drop-down menu.
3. Click on **Create/History** on the drop down menu to display the Request History screen with the following fields:
   a. **Status** - **A** for active or **I** for inactive
   b. **Type** – **U** for urban, **R** for rural and **I** for immediate pay.
   c. **Comp Code/Start/End -** the 2 digit component code for the component that the auto pay was set up against plus the start and end date of the component.
   d. **Created** – the date the auto pay was set up and logon Id of the worker who set it up**.**
   e. **Updated/stopped** – the date the auto pay was modified or stopped and the worker requesting the change. Note: If CATS stops the auto pay then the CATS generic worker ID will display.
4. Click on the **Select Box** in front of the payment to be reviewed. This will display a side menu.
5. Click on **Review** from the side menu to display the Auto Pay Request Detail screen with the following fields:
   a. **Type** – **U** for urban, **R** for rural and **I** for immediate pay.
   b. **Component** – the **two digit code** and the **description** of the component the auto pay was charged against.
   c. **Immediate** – **Yes** for immediate pay issued or **No** for regular auto pay issued.
   d. **Starts Date** – the start date of the component.
   e. **End Date -** the end date of the component.
   f. **Address** – the address that the auto pay warrant was mailed to.
   g. **Create Date/ Time** – the date and time that the auto pays was created.
   h. **User** – the logon id of the person who created the auto pay.
   i. **Update Date/ Time -** the date and time the auto pay request was last updated.
   j. **User** – the logon id of the worker who last updated the request.
6. Click on the **Back Button** to return to the Request History screen.

Create an Auto Pay request

Function used to set up auto pay for a customer.

1. Select a **Customer**

Note: once a customer has been selected there are two ways to get to the Request History screen to set up auto pay.

Option 1

1. Click on **Customer Home** on the Customer tab to display the Customer Home Page for the customer.
2. Click on **Auto Trans Pay** link found directly above the active component on the Customer Home Page to display the Request History Screen.

Option 2

1. Move your mouse over **Auto Pay** on the Customer tab.
   This will display a drop-down menu.
2. Click on **Create/History** on the drop down menu to display the Request History screen.

Choose the option then:

1. Click on the **Create Button** on the Request History screen to display the Create Auto Pay Request For screen.
2. Select the **Type**: urban or rural.
   a. Select the **Component** to set up auto pay against: JS, PT, FT, OT.
   b. Select **Immediate Pay** to yes or no.
   c. Verify that the **Address** listed is the customer's most recent address. If not, key in the new address. This address will only stay until the first auto pay run date. Then the address will revert to whatever address is listed in eJAS.
3. Click on the **Save button**.
4. Click **Ok** on the confirmation pop up box to set the Auto Pay.

Note: if there is no valid component for auto pay in eJAS, the customer's address is missing or incomplete or the customer's social security number is blank, auto pay will not set up.

Cancel/Stop an Auto Pay

Function used to cancel/stop auto pay that has been set up.

1. Select a **Customer.**
2. Move your mouse over **Auto Pay** on the Customer tab to display a drop-down menu.
3. Click on **Create/History** on the drop down menu to display the Request History screen.
4. Click on the **Select box** in front of the request to be stopped. The status Type must be an A for active to stop auto pay. This will display a side menu.
   a) Click on **Update** from the side menu.
   b) Click on the **Stop AutoPay Request button.**
   c) Click on **Yes** in the request confirmation pop up box.
   d) Click on **Ok** on the confirmation pop up box.

Update Auto Pay

1. Select a **Customer**
2. Move your mouse over **Auto Pay** on the Customer tab to display a drop-down menu.
3. Click on **Create/History** on the drop down menu to display the Request History screen.
4. Click on the **Select box** in front of the request to be updated. The status type must be an A for active to update the auto pay. This will display a side menu.
5. Click on **Update** on the side menu to bring up the update Auto Pay request screen.
6. Make the **Changes** to the appropriate fields.
7. Click on the **Save** button.
8. Click on **Ok** on the confirmation pop up box.

Weekly Activity Planner

ESD Employment Coaches use the Weekly Activity Planner to list weekly required activities for participants.

Creating a new weekly activity planner

1. Click on **Activity Planner** on the Customer tab. This display creates a new activity planner screen.
2. Click on the icon to the right of the section titled activity planner start date to select the start date for the activity planner.
3. Click on the icon to the right of the section titled activity planner start date to select the end date for the activity planner.
4. Click on the **Create New Planner** button. This will save the dates selected and transfer the dates to a blank activity planner screen.
5. Enter in the participants weekly requirements in the **Requirements** and or **Daily** section of the plan.

NOTE: You may enter information in the individual text boxes or by clicking on the detail button and entering the information in the pop up window.

6. Click on the **Save** button to save entries made.

Modifying an open weekly activity planner

1. Click on **Activity Planner** on the Customer tab. This will display the open activity planner.
2. Enter in the **New Information**.
3. Click on the **Save** button to save entries made.
4. Click **Ok** on the confirmation pop up box.

Closing a weekly activity planner

1. Click on **Activity Planner** on the Customer tab. This displays the open activity planner.
2. Review information added by the participant by clicking on the icon.
3. Review and or update the JS hours.
4. Enter information into the **Evaluation section**.
5. Click on the **Save** button to save the evaluation. This will display the “Do you wish to save the actual hours” pop up box.

   Clicking **No** will save the weekly evaluation, populate the weekly evaluation date section and completed by section on the Activity Planner list to show that the plan has been completed. The completed evaluation will be transferred to eJAS notes.

   or

   Clicking **Yes** in addition to saving the weekly evaluation, posting the completion date and transferring the note to eJAS, will transfer the actual hours entered to the actual hours screen.

   1. Clicking **Yes** will display the “Please choose the component to work with” pop up screen.
   2. Click on the **Next** button to display the date range of the activity planner.
   3. Use the **Up** and **Down** arrows on the left side to select the date range.
   4. Enter in the excused, holiday, temporary employment and/or unexcused hours for the date range selected
   5. Click on the **Add Actual Hours** button

6. Click on the **Continue** button to add hours for a different component or date range. Repeat the steps above

OR

7. Click on the **Finish** button to complete the process. This will display a confirmation pop up box. Click **Ok**

Note: Once you close the planner, you can't make any changes. You can still update the actual hours screen, but changes will not transfer back to the activity planner.

Reviewing completed activity planners

1. Click on **Activity Planner** on the Customer tab
2. Click on the **Review Prior plans** button this will display the Activity Planner list.
3. Scroll to the planner to be reviewed by using the **Up** or **Down** buttons.
4. Click on the **Select** box in front of the planner to be reviewed. This will display a popup menu.
5. Click on **Review** on the popup menu. This will display a copy of the planner as a document.

Printing activity planners

Open planner

1. Click on **Activity Planner** on the Customer tab.
2. Click on the **Print** button. This will display the print version of the open planner.
3. Click **Print** button on the pop up window.
4. Click on **Print** on the print dialogue box.

Closed planners

1. Click on **Activity Planner** on the Customer tab.
2. Click on the **Review Prior Plans** button this will display the Activity Planner list.
3. Scroll to the planner to be reviewed by using the **Up** or **Down** buttons.
4. Click on the **Select** box in front of the planner to be reviewed. This will display a popup menu.
5. Click on **Print** on the popup menu. This will display the print version of the activity planner.
6. Click on **Print** button.
7. Click on **Print** on the print dialogue box.

Modifying the weekly activity planner end date

1. Click on **Activity Planner** on the Customer tab. This will display the open activity planner.
2. Click on the icon to the right of the requirements section. This will display the update plan end date pop up box.
3. Click on the icon to the right of the update end date box. This will display a calendar.
4. Click on the **Date** on the calendar. This will populate the update end date box.
5. Click on the **Save** button in the pop box. This will close the pop up box and populate the activity planner requirements, daily and evaluation sections with the new date.

Deleting a weekly activity planner (Supervisor function only)

The delete function should be used with care as it is not revisable.

Open planner

1. Click on **Activity Planner** on the Customer tab. This will display the open activity planner.
2. Click on the **Review Prior Plans** button. This will display the Activity Planner list.
3. Click on the **Select** box in front of the planner to be deleted. This will display a popup menu.
4. Click on **Delete** on the pop-up menu.
5. Click on **Yes** on the request confirmation pop box.

Closed planners

1. Click on **Activity Planner** on the Customer tab. This will display the Activity Planner List screen.
2. Scroll to the planner to be reviewed by using the **Up** or **Down** buttons.
3. Click on the **Select** box in front of the planner to be deleted. This will display a popup menu.
4. Click on **Delete** on the pop-up menu.
5. Click on **Yes** on the request confirmation pop box.

   <u>Note</u>: Deleting a closed planner will also remove the evaluation note from eJAS.

Actual Hours

The ESD's Employment Services Programs has a requirement to track and report the actual hours of participation for each participant enrolled in ESD's Job Search, Work Experience, and Job Training activities. Employees use the actual hours screen to enter actual hours of participation, excused absences, and unexcused absences.

Add Hours

1. Click on **Actual Hours** on the Customer tab.
   This will display the Actual Hours Page.
2. Select the **Report** month from the drop down box at the top of the page.
3. Click on the **Select** box for the component the hours are to be entered. A pop-up menu displays available screen options.
4. Click on the **Add** option on the menu. This will open up a section for entering in data.
5. Click on the **Calendar** button to the right of the **From** box and select the start date for the date range.
6. Click on the **Calendar** button to the right of the **To** box and select the end date of the date range.
7. Key in the number of **Participation hours** for the date range selected.
   This is a mandatory field, if there are no hours of participation then a zero must be entered.
   Valid entries for partial hours are .25 (15 minutes) .50 (half hour) .75 (45 minutes) for all hours field.
8. Click on the **Excused Hours** button – optional field.
   1. Key in the **Number of Excused Hours.** This is a require field when a Date is entered.
   2. Key in the **Date** for the excused hours. This is a required field when hours are entered.
   3. Click on the **Add** button to add more entries.
   4. Click on the update button saves the excused hours entries.
9. Key in **State Holiday Hours** – optional field.
10. Key in **Unexcused Hours** – optional field.
11. Key in **Temp Emp Hours** – optional field
12. Click on the **Add** button to add the information and return to the Actual Hours page.
    Caution the data entered is <u>not saved</u> until the Save button on the Actual Hours page is clicked.
13. Click on the **Save** button.
    This will display a pop-up box with the following message: Successful Save.
14. Click on the **OK** button on the pop-up screen to complete the process.

Update Hours

1. Click on **Actual Hours** on the Customer tab.
   This will display the Actual Hours Page.
2. Select the **Report** month from the drop down box at the top of the page.
3. Click on the **Select** box in front of the date range to be updated.
   A pop-up menu displays available screen options.
4. Click on the **Update** option on the menu. This will open up a section for updating any of the entries for the date range selected.
5. Enter in the data changes.
6. Click on the **Update** button to update the data and return to the Actual Hours page. **Caution** the data entered is <u>not saved</u> until the Save button on the Actual Hours page is clicked.
7. Click on the **Save** button.
   This will display a pop-up box with the following message: Successful Save.
8. Click on the **OK** button on the pop-up screen to complete the process.

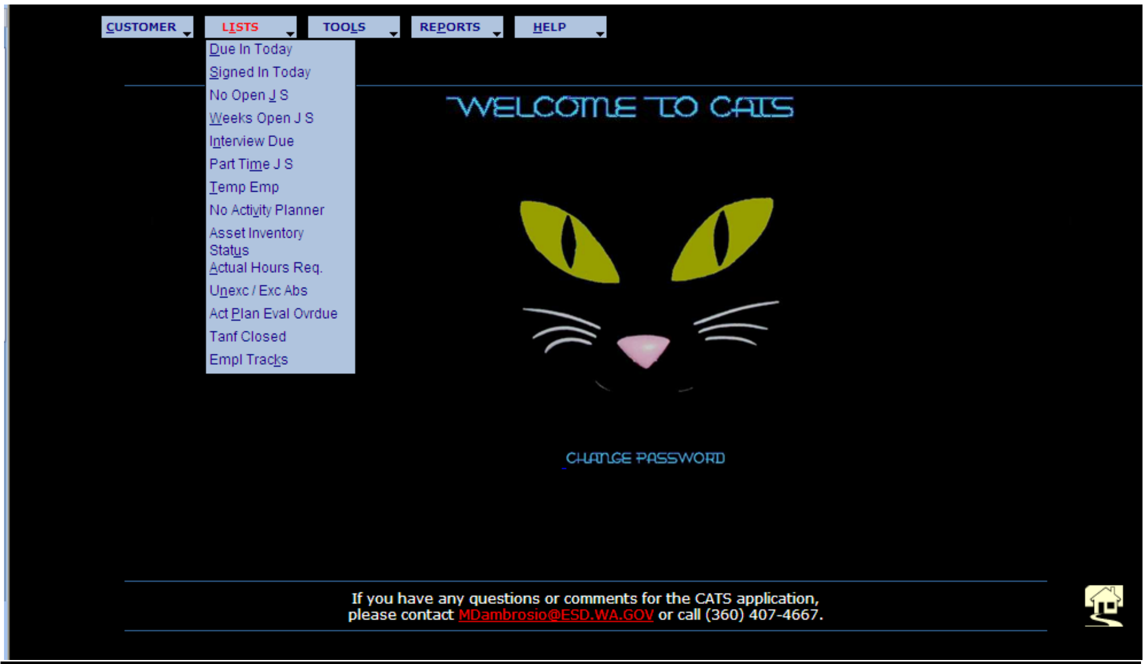
Delete Hours

1. Click on **Actual Hours** on the Customer tab.
   This will display the Actual Hours Page.
2. Select the **Report** month from the drop down box at the top of the page.
3. Click on the **Select** box in front of the date range to be deleted.
   A pop-up menu displays available screen options.
4. Click on the **Delete** option on the menu. This will display a pop-up box with the message: Are you sure you want to delete?
5. Click on **Yes** to complete the process.

Note: Deleting a date range will delete it on the Actual Hours page and not from the eJAS history file. The eJAS history file will display the record with a status of “I” for inactive and it will not be counted in the actual hours totals.

Lists Menu

The List function helps employees manage all participants assigned to their office. You can quickly review a specific activity for all participants receiving services.



Due in Today

Real time list of Customers due to report in (sign in) today. This is a read only list with links to other CATS screens that can be updated or reviewed. Once a Customer is signed in, their name is removed from the Due In Today list and added to the Signed In list.

Review the Due In Today List

1. Click on **Due In Today** on the Lists tab.
   This will display a list of Customers with the following information:
   - CSO
   - Name
   - Months on TANF
   - JAS ID Number
   - A/P Eval Due Date
   - Number Of No Shows
   - Excused Absences
   - Days Due In
   - All Open Components
   - AutoPay
2. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter in part or all of the Customer's **Last Name** (in the box at the top of the screen) and then click on the **Go** button.

Review Customer Information On The Due In Today List

1. Click on **Due In Today** on the Lists tab.
   This will display a list of Customers.
   To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter in part or all of the Customer's **Last Name** (in the box at the top of the screen) and then click on the **Go** button.
2. Click on the **Select** box in front of the Customer you want to review. A pop-up menu displays available screen options.
3. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Customers Due In Today screen.

Download The Due In Today List

1. Click on **Due In Today** on the Lists tab.
   This will display a list of Customers.
2. Click on the **Download** button.
   A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) <u>or</u> click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - Next Attendance Date
   - CSO
   - Last Name
   - First Name
   - Months on TANF

- JAS ID Number
- Activity Planner Eval Due Date
- Number Of No Shows
- Days Due In
- TANF Case Status
- Participation Status
- All Open Components
- Auto Pay
- Number of Excuses

Signed In Today

Real time list of Customers who have signed in or were signed in today. This is a read only list with links to other CATS screens that can be updated or reviewed.

Review The Signed In Today List

- Click on **Signed In Today** on the Lists tab.

  This will display a list of Customers with the following information:
- Next Attendance Date
- CSO
- Full Name
- JAS ID Number
- Sign In Time
- Months on TANF
- Number Of No Shows
- A/P Eval Due Date
- All Open Components
- Auto Pay

2. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list or enter in part or all of the Customer's **Last Name** (in the box at the top of the screen) and then click on the **Go** button.

Review Customer Information On The Signed In Today List

1. Click on **Signed In Today** on the Lists tab.
   This will display a list of Customers. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list or enter in part or all of the Customer's **Last Name** (in the box at the top of the screen) and then click on the **Go** button.
2. Click on the **Select** box in front of the Customer you want to review. A pop-up menu displays available screen options.
3. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Customers Who Signed In Today screen.

Download the Signed In Today List

1. Click on **Signed In Today** on the Lists tab.
   This will display a list of Customers.
2. Click on the **Download** button.
   A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - Next Attendance Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number
   - Sign In Time
   - Months on TANF
   - Number Of No Shows
   - TANF Case Status
   - Participating Status
   - All Active Components
   - Auto Pay
   - A/P Eval Due Date

No Open JS

This is a real time list of Customers who have signed in, but do not have an open job search (JS) component. Once the JS component is entered for a Customer, their name is removed from the No Open JS list. If no JS component is opened for the Customer, their name remains on the No Open JS list for 30 days (unless manually removed).

Review The No Open JS List

1. Click on **No Open JS** on the Lists tab.
   This will display a list of Customer with the following information:
   - Date
   - CSO
   - Full Name
   - JAS ID Number
   - TANF Case Status
2. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter part or all of the Customer's **Last Name** (in the box near the top of the screen) and click on the **Go** button.

Remove Customers From The No Open JS List

1. Click on **No Open JS** on the Lists tab.
   This will display a list of Customers.
   To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter part or all of the Customer's **Last Name** (in the box near the top of the screen) and click on the **Go** button.
2. Click on the **Select** box in front of the desired Customer.
3. Click on **Remove** on the pop-up menu.
4. Click **Ok** on the pop-up box that requests if you want to remove the Customer from the No Open JS list.

The Customers name has now been removed from the No Open JS list. If the Customer signs in again before the job search component is opened, their name will reappear on the No Open JS list.

Download the No Open JS List

1. Click on **No Open JS** on the Lists tab.
   This will display a list of Customers.
2. Click on the **Download** button.
   A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) <u>or</u> click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number
   - TANF Case Status

Weeks Open JS

Real time list of Customers in job search (JS). List is searchable by the week of JS the Customer will be entering next week. This is a read only list with links to other CATS screens that can be updated or reviewed. Names stay on the Weeks Open JS list until the job search component is closed.

Review The Next Week, Customers Scheduled To Enter Week? Of JS List

1. Click on **Weeks Open J S** on the Lists tab.
   This will display (by default) a list of all Customers in job search.
2. Click on the **Down Arrow** near the top of the screen.
   This will display a drop-down list of job search weeks. You can review Customers entering week 2 to week 12 of job search or choose 'ALL' for the whole list.
3. Click on the **Week** of job search to be reviewed.
   This will display a list of Customers with the following information:
   - JS Completion Date
   - CSO
   - Full Name
   - JAS ID Number
   - WSA
   - EP
   - EC
   - Auto Pay
4. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list.
   NOTE: The letter C is displayed when an activity is completed.
   NOTE: The blank box is displayed when an activity is not completed or is not due.

Review Customer Information on the Weeks Open JS List

1. Click on **Weeks Open J S** on the Lists tab.
   This will display (by default) a list of all Customers in job search.
2. Click on the **Down Arrow** near the top of the screen.
   This will display a drop-down list of job search weeks. You can review Customers entering week 2 to week 12 of job search or choose 'ALL' for the whole list.
3. Click on the **Week** of job search to be reviewed.
   This will display a list of Customers for the selected week of job search.
4. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list.
5. Click on the **Select** box in front of the Customer you want to review.
   This will display a pop-up menu.
6. Click on **One** of the following items displayed on the pop-up menu.
   - **Customer Home** - links to the Customer Home Page screen.
   - **Record Attendance** - links to the Record Attendance screen.
   - **Attendance History** - links to the Attendance History screen.

- **Attendance Override** - links to the Set Attendance Requirements screen.
- **Employment Plan** - links to the Employment Plan List screen.
- **Asset Inventory** - links to the Asset Inventory screen.

7. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Next Week, Customers Scheduled to Enter Week of JS screen.

Download the Next Week, Customers Scheduled To Enter Week of JS List

1. Click on **Weeks Open J S** on the Lists tab.
   This will display a list of Customers.
2. Click on the **Download** button.
   A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) <u>or</u> click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - JS Completion Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number
   - Work Skill Assessment
   - Employment Plan
   - Employment Competencies
   - Auto Pay
   - TANF Status
   - CATS Status
   - Mailing Name
   - Mailing Address Line 1,2, and 3
   - City
   - State
   - Zip
   - Phone Number

Interview Due

This is a real time list of Customers due for an interview. Names are added to this list for two reasons: 1) Customer has 2 excused absences, and 2) the Customer identified as needing an ‘Other Interview’ by a staff member. This list displays a ‘Y’ indicator in the column for which the interview or evaluation is due. Names remain on the list until the interview or evaluation is completed or until the job search component is closed.

Review The Customers Identified For An Interview List

1. Click on **Interview Due** on the Lists tab.
   This will display a list of Customer with the following information:
   - Interview Due Date
   - CSO
   - Full Name
   - JAS Number
   - Phone Number
   - Interview Reason (2Ex/Oth)

   NOTE: When multiple interviews are due, the date displayed is for the oldest interview due. For a future dated Other Interview, only the Customer name is displayed at the bottom of the list. On the day that the Other Interview is actually due, the 'Y' indicator will appear in the Other column and the Customer name is placed in date order.

2. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list or enter the Interview Due Date (in the box near the top of the screen) and click on the **Go** button.

Review Customer Information on the Interview Due List

1. Click on **Interview Due** on the Lists tab.
   This will display a list of Customers.
   To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list or enter the Interview Due Date (in the box near the top of the screen) and click on the **Go** button.
2. Click on the **Select** box in front of the Customer you want to review. A pop-up menu displays available screen options.
3. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Customers Identified For An Interview screen.

Download The Customers Identified For An Interview List.

1. Click on **Interview Due** on the Lists tab.
   This will display a list of Customers.
2. Click on the **Download** button.
   A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - Interview Due Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number
   - Phone Number
   - Interview Reason (2Ex/Oth)

Part Time JS

This is a real time list of Customers who are in part-time job search. This is a read only list with links to other CATS screens that can be updated or reviewed. Names on this list may need an override to their participation requirements. A Customer's name stays on the Part Time J S list until it is removed or the job search component is closed.

Review the Part Time Job Search List

1. Click on **Part Time J S** on the Lists tab.
   This will display a list of Customers with the following information:
   - Part Time J S Start Date
   - CSO
   - Full Name
   - JAS Number
2. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list or enter the desired Part Time J S Start Date (in the box near the top of the screen) and click on the **Go** button.

Review Customer Information on the Part Time JS List

1. Click on **Part Time J S** on the List tab.
   This will display a list of Customers.
   To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list or enter the desired Part Time J S Start Date (in the box near the top of the screen) and click on the **Go** button.
2. Click on the **Select** box in front of the Customer you want to review. A pop-up menu displays available screen options.
3. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Part Time J S screen.

Remove a Customers from the Part Time J S List

1. Click on **Part Time J S** on the Lists tab.
   This will display a list of Customers.
   To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list or enter the Part Time J S Start Date (in the box near the top of the screen) and click on the **Go** button.
2. Click on the **Select** box in front of the Customer you want to review. A pop-up menu displays available screen options.
3. Click on **Remove** from the pop-up menu.
4. Click **OK** on the pop-up confirmation box to complete the action. The Customer's name has now been removed from the Part Time J S list.
5. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Part Time J S screen.

Download the Part Time JS List

1. Click on **Part Time J S** on the Lists tab.
   This will display a list of Customers.
2. Click on the **Download** button.
   A file download box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - Part Time J S Start Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number

Temporary Employment

This is a read only list of customers, who have an excused absence for unverified temporary employment recorded in attendance history.

Review the Temporary Employment List

1. Click on **Temp Emp** on the Lists tab.
   This will display a list of Customers with the following information:
   - Temp Employment date
   - TV/TU (type of temporary employment)
   - CSO
   - Full Name
   - JAS ID Number
   - No Shows
2. To locate a specific Customer, use the **scroll bar** to navigate through the list

Review Customer Information on the Temporary Employment list

1. Click on **Temp Emp** on the Lists tab.
   This will display a list of Customers.
   To locate a specific Customer, use the **scroll bar** to navigate through the list
2. Click on the **Select** box in front of the Customer you want to review. A pop-up menu displays available screen options.
3. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Temporary Employment List screen.

Download the Temporary Employment list

1. Click on **Temp Emp** on the Lists tab.
   This will display a list of Customers.
2. Click on the **Download** button.
   A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) <u>or</u> click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - Temporary Employment Date
   - TU/TV (type of temporary employment)
   - CSO
   - Full Name
   - JAS ID Number

No Open Activity Planner

This is a read only list of customers, who have a Job Search component open for at least 2 days with no activity planner created. Customers' name will be removed from the list once the activity planner is created or the Job Search component is closed.

Review the No Open Activity Planner list

1. Click on **No Open AP** on the Lists tab.
   This will display a list of Customers with the following information:
   - Last Name
   - First Name
   - CSO
   - JAS ID Number
   - JS Start Date
2. To locate a specific Customer, use the **scroll bar** to navigate through the list

Review Customer Information on the No Open Activity Planner list

1. Click on **No Open AP** on the Lists tab.
   This will display a list of Customers.
   To locate a specific Customer, use the **scroll bar** to navigate through the list
2. Click on the **Select** box in front of the Customer you want to review. A pop-up menu displays available screen options.
3. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the No Open Activity Planer screen.

Download the No Open Activity Planner list

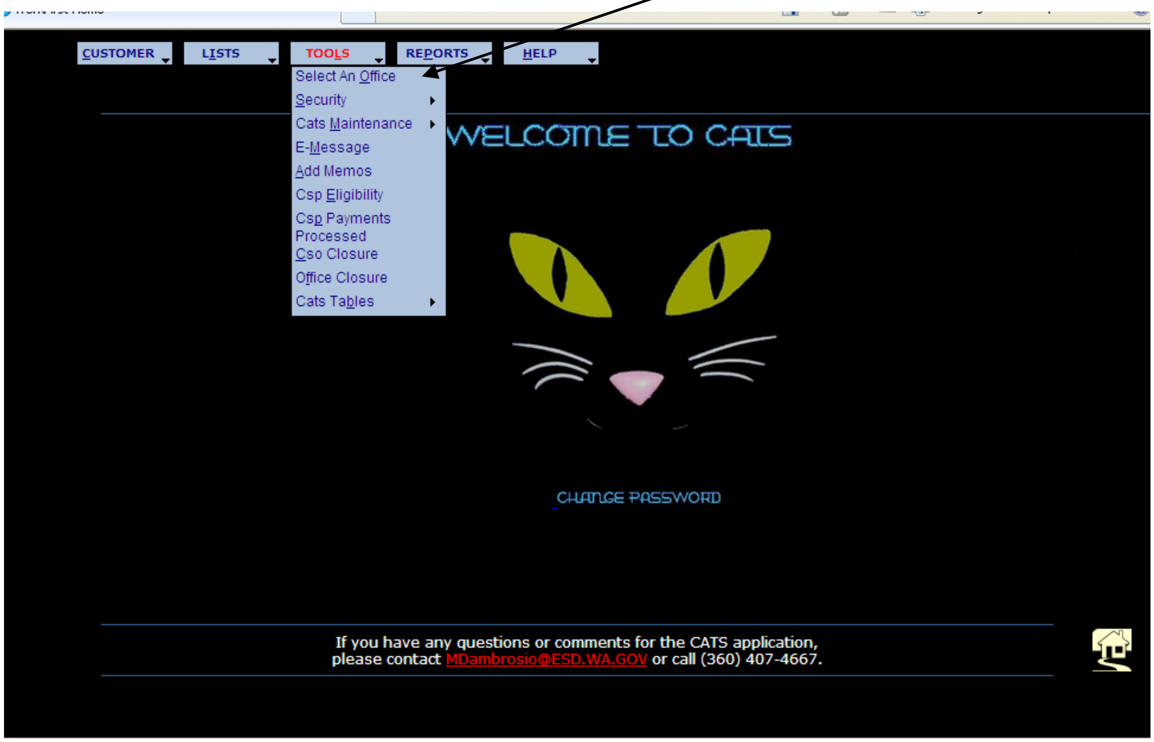
1. Click on **No Open AP** on the Lists tab.
   This will display a list of Customers.
2. Click on the **Download** button.
   A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:

   - Full Name
   - CSO
   - JAS ID Number
   - JS Start Date
   - No Shows

Tools Menu

Select An Office

The system automatically defaults to the primary office of the individual user when first logging in. User's attached to more than one office can switch from office-to-office. To change to a different office in CATS, use the **Select an Office** feature on the Tools tab. Individual office's are identified and selected by an Office ID Number (the middle 3-digits of the cost center number).



To confirm your primary and/or current office, click on any list on the Lists tab and the name of the office will be displayed.

An office can be selected in one of three ways:

1. by entering the full 3-digit Office ID Number
2. by entering part of the Office ID Number
3. or by selecting from a list of offices

Select An Office By The Full 3-digit Office ID Number:

1. Click on **Select An Office** on the Tools tab.
   This will display the Office Selection screen.
2. In the Office ID box, enter the **3-digit Office Number** (the middle 3-digits of the cost center number).
3. Clicking on the **Select** button completes the process

Select An Office By Part Of The Office ID Number:

1. Click on **Select An Office** on the Tools tab.
   This will display the Office Selection screen.
2. Enter part of the Office ID Number in the **Starting Office ID** box,
3. Click on the **Find** button.
   This displays a list of offices starting with the digit(s) entered.
4. Click on the scrolling **Up** or **Down** buttons to navigate through the list.
5. To select an Office, simply **Move The Cursor** over the desired Office Name and "double click." This completes the process.
   NOTE: Once an office has been selected, clicking on any of the lists in CATS brings up information for that office only.

Select An Office From A List Of Offices:

1. Click on **Select An Office** on the Tools tab.
   This will display the Office Selection screen.
2. Click on the **Find** button (to the right of the Starting Office ID box).
   This displays a list of offices.
3. Click on the scrolling **Up** or **Down** buttons to navigate through the list.
4. To select an Office, simply **Move The Cursor** over the desired Office Name and "double click." This completes the process.
   NOTE: Once an office has been selected, clicking on any of the lists in CATS brings up information for that office only.

Office Closure

This is a real time list of individual office closures. It displays closure dates and the reason for closure, both planned and unplanned. A planned office closure is usually due to a conference, meeting, training, or job fair. An unplanned office closure is usually due to reasons beyond the control of the local WorkFirst office, such as facility issues or weather.

This list identifies Customers who signed in before the date was set for the office closure and who may not be aware that the office will be closed on their next report date. This list helps to identify Customers who may need to be contacted and told about the office closure.

Review Office Closure List

1. Click on **Office Closure** on the Tools tab.
   This displays the date and reason for each office closure (starting with the most recent).
2. To locate a specific office closure, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter the desired Office Closure Date (in the box near the top of the screen) and click on the **Go** button.

Review Customer Information on the Office Closure List

1. Click on **Office Closure** on the Tools tab.
   This displays the date and reason for each office closure (starting with the most recent).
2. To locate a specific office closure, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter the desired Office Closure Date (in the box near the top of the screen) and click on the **Go** button.
3. Click on the **Select** box in front of the date to be reviewed. A pop-up menu appears.
4. Click on **Customers** from the pop-up menu.
   This will display a Customers Due In list with the following information:
   - Full Name
   - JAS ID Number
   - Telephone Number
   - Next Attendance Date
   - Number Of No Shows
5. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list.
6. Click on the **Select** box in front of the desired Customer. A pop-up menu displays available screen options.
7. Click on either the **Back** button <u>or</u> the **Cancel** button depending on which screen you are on to return to the Customer Due In On screen.
8. Click on the **Back** button to return to the Office Closure screen.

Download the Customer Due In On List

1. Click on **Office Closure** on the Lists tab. This displays the date and reason for each office closure (starting with the most recent).
2. To locate a specific office closure, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter the desired Office Closure Date (in the box near the top of the screen) and click on the **Go** button.
3. Click on the **Select** box in front of the date to be reviewed. A pop-up menu appears.
4. Click on **Customers** from the pop-up menu.
   This will display a Customers Due In list with the following information:
   - Full Name
   - JAS ID Number
   - Telephone Number

- Next Attendance Date
- Number Of No Shows

5. Click on the **Download** button.
   A file download box will appear with two options.
6. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - Last Name
   - First Name
   - JAS ID Number
   - Telephone Number
   - Next Attendance Date
   - Number Of No Shows

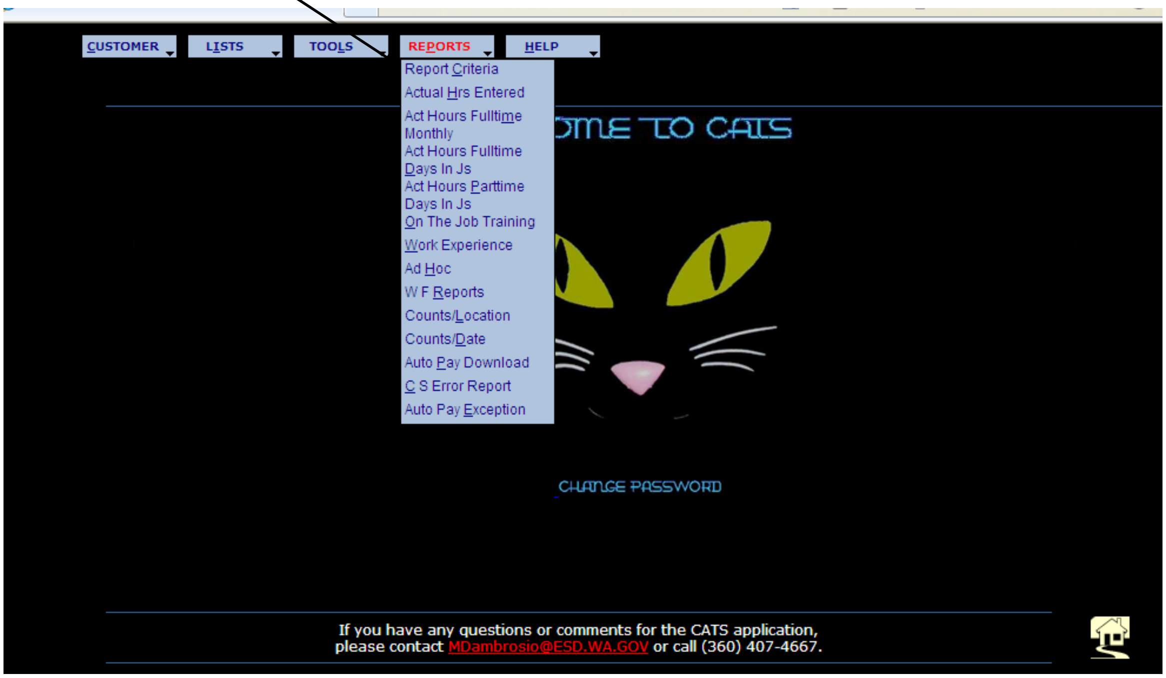
Review CATS Tables

This is a read only list displaying codes and titles used in CATS tables.

1. Move your mouse over **CATS Tables** on the Lists tab.
   This displays a drop-down menu of the following tables:
   - **Activity Codes -** a list of activities a Customer may attend.
   - **Excused Absence -** a list of reasons, used by CATS and the Excused Absence Call-in Line, for excusing a Customer from job search.
   - **Holidays –** a list of dates when all offices are closed due to a legal holiday.
   - **Offices –** a list of WorkFirst offices identified in CATS by name and number.
   - **Override Reasons** – a list of reasons for overriding a Customer's attendance requirements.
   - **No Sign In Credit –** a list of offices who have chosen to not let Customers sign in when they have an interview pending.
2. Click on the **Table** to be reviewed.
   This displays a pop-up screen of specific table information.
3. Use the **Up** or **Down** scroll buttons to navigate through the list or enter the desired code/date in the Starting From box and click on the **Go** button.
4. Click on the **Close** button to close the table pop-up screen.

Reports Menu

Report Criteria



The reports criteria screen is only for use with the WF reports and is not intended to replace the office selection functions. Selection criteria screen allow for 4 levels of reporting, Statewide, WDA, office, and CSO. There are two ways to select the level desired either by double clicking on a tree items on the left of the screen or typing in information on the right side of the screen.

Using the tree view to select report level: (Right side of the screen**)**

1. Click on **Report Criteria** on the Reports tab to display the Report Selection Criteria screen. The default for this screen is set for office level reporting.
2. To select **WDA** click the **WDA radio button** to collapse the list to WDA level then double click on the WDA name. Alternative method is to double click on the **WDA** name on the expanded list.
3. To select **Office** double click on the office name. Use the **scroll bar** on the right of the screen to move up and down the list.
4. To Select **CSO** level click on the **CSO radio button** to expand the whole list to the CSO level then double click on the **CSO** name. Alternative method is to click on the **+ sign** in front of the office the CSO is attached to expand the selection then click on the **CSO**
5. Once the select is made return to the report tab to select the report.

Select by ID Number:

1. Click on **Report Criteria** on the Reports tab to display the Report Selection Criteria screen. The default for this screen is set for office level reporting.
2. To select **WDA** enter in the 1 or 2 digit **number** in the text box on the left side of the screen and click on the **select** button.
3. To select **Office** enter in the 4 digit office **number** in the text box on the left side of the screen and click on the **select** button.
4. To select **CSO** enter in the 3 digit CSO **number** in the text box on the left side of the screen and click on the **select** button.
5. To select **Statewid**e click on the statewide button on the left side of the screen
6. Once the select is made return to the report tab to select the report.

Actual Hours Entered Report

This report tracks daily, the entries made on the actual hours screen and compares them with the required hours of participation based on the number of days the participant has been in JS. The calculation will either return a positive or negative figure.

Actual Hours Entered by Office/CSO

1. Use the Report Criteria under the report tab to select the office or the CSO.
2. Click on **Actual Hrs Entered** on the Reports tab to display the Actual Hours Entered Report which constrains the following information:
   - **Office** - Display the office number and name selected. If **CSO** is selected then the CSO number and name will be displayed.
   - **Select Report Month** - Drop down used to select the month and year for the report. Default is the current month.
   - **Download button** - Clicking on the download button will open a new window displaying all the same information as the screen in an excel spreadsheet format.
   - **As of Date** - This is the date the report data was last updated. The report is updated nightly.
   - **Name** - Participants first and last name which also is a link to the Customer home page.
   - **JAS id** - unique indentify for the participant.
   - **Component Start date** - Component start date and component code. Holding you mouse over the date will display the close date for the component displayed.
   - **Business days -** number of business days since the start of the month the participant has been in the component. Business days are defined weekdays.
   - **Req Hours of Part** - Number of hours a participant is required to participate per week.
   - **Hours required** - hours per week divided by 5 times the number of business day since the start of the month.

- **+Reported** - the total number of participation hours entered in the actual hours screen.
- **- Reported** -the hours of participation entered in the actual hours screen displayed by type.
- **Hrs Last updated -** the date information was last added or updated in the actual hours screen.
- **+ Counted** - the total number of participation hours counted toward the actual hours required goal. Only the first 16 hours of excused absence will be counted.
- **Act Hours Goal Met -** the report compares the hours required to the hours counted. If the hours required are greater than the hours counted the difference will be displayed in red. If the hours required are less than the hours counted the difference will be displayed in black. If the hours required and counted are the same then "Yes" will be displayed for goal met.

Work Experience Participants report

This is a read only report of customers who are in an ESD managed WE component for the time period selected.

Review the Work Experience Participants report

Use the Report Selection Criteria under the Report tab to select the reporting criteria. When the Statewide option is selected, the following information will display:

- WDA
- Office
- Count for each office
- Statewide Total

When the WDA option is selected, the following information will display:

- Office
- Count for each office
- WDA Total

When the Office or CSO option is selected, a detailed report will display the following information:

- CSO
- Worker ID
- JAS ID
- Name
- Contract #
- Component Start Date
- Component End Date
- Actual End Date
- All Open Comp
- Employer Name
- Job ID

1. Select a program year.
2. To locate a specific Customer, use the scroll bar to navigate through the list.

Download the Work Experience Participant report

1. Use the Report Selection Criteria screen to choose the level of detail to view then select the program year to run the report.
2. Click on the **Download** button.
3. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
4. If the Statewide option was selected the Excel spreadsheet will contain the following information:
    - WDA
    - Office
    - Count for each office
    - Statewide Total
5. If the WDA option was selected the Excel spreadsheet will contain the following information:
    - Office
    - Count for each office
    - WDA Total

6. If the Office or CSO option was selected the Excel spreadsheet will contain the following information:
    - CSO
    - Worker ID
    - JAS ID
    - Name
    - Contract #

- Component Start Date
- Component End Date
- Actual End Date
- All Open Comp
- Employer Name
- Job ID

On the Job Training Participant Report

This is a read only report of customers who are in an ESD managed OT component for the time period selected.

Review the On the Job Training Participant Report

Use the Report Selection Criteria under the Report tab to select the reporting criteria. When the Statewide option is selected, the following information will display:

- WDA
- Office
- Count for each office
- Statewide Total

When the WDA option is selected, the following information will display:

- Office
- Count for each office
- WDA Total

When the Office or CSO option is selected, a detailed report will display the following information:

- CSO
- Worker
- JAS ID
- Participant Name
- Contract #
- Contract Start Date
- Contract End Date
- Actual End Date
- Employer Name
- Job ID
- Obligation
- Payments
- Date Last Payment

1. Select a program year.
2. To locate a specific Customer, use the scroll bar to navigate through the list.

Download the On the Job Training Participant report

1. Use the Report Selection Criteria screen to choose the level of detail to view then select the program year to run the report.
2. Click on the **Download** button.
3. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
4. If the Statewide option was selected the Excel spreadsheet will contain the following information:
    - WDA
    - Office
    - Count for each office
    - Statewide Total
5. If the WDA option was selected the Excel spreadsheet will contain the following information:
    - Office
    - Count for each office
    - WDA Total

6. If the Office or CSO option was selected the Excel spreadsheet will contain the following information:
    - CSO
    - Worker
    - JAS ID
    - Participant Name
    - Contract #
    - Contract Start Date
    - Contract End Date
    - Actual End Date
    - Employer Name
    - Job ID
    - Obligation
    - Payments
    - Date Last Payment

Counts by Location

This CATS report tracks daily activities by Office, CSO or DSHS region. Data is displayed for the past 45 business days.

Customer Counts by Office

1. Click on **Counts/Location** on the Reports tab.
   This displays (by default) the Customer Counts By Office screen. This report begins from the previous business day and contains the following information:
   - Date - Report Date
   - CSO - Attached To The Office (some offices have multiple CSOs)
   - Due In Today - Number Of Customers Due In Today
   - Signed In Today (Count) - Number Of Customers Signed In Today
   - Signed In Today (%) - Percentage Of Customers Who Signed In Today
   - Excused (Count) - Number Of Customers Excused From Participation
   - Excused (%) - Percentage Of Customers Excused From Participation
   - RB Non Part (Count) - Number Of Customers Referred Back For Not Participating
   - RB Non Part (%) - Percentage Of Customers Referred Back For Not Participating
   - No Show (Count) - Number Of Customers Failing To Show (Sign In)
   - No Show (%) – Percentage Of Customers Failing To Show (Sign In)
   - Entered CATS - Number Of Customers Starting Job Search
2. Use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter the desired date in the From Date box and then click on the **Go** button.

Customer Counts by CSO

1. Click on **Counts/Location** on the Reports tab.
   This displays (by default) the Customer Counts By Office screen.
2. Click on **CSO** at the top of the screen.
   This displays the Customer Counts By CSO screen.
3. Enter the desired **CSO Number** in the CSO box.
4. Click on the **Go** button at the top of the screen.
   This displays data for the CSO selected. This report begins from the previous business day and contains the following information:
   - Date - Report Date
   - Office - Attached To Your CSO
   - Due In Today - Number Of Customers Due In Today
   - Signed In Today (Count) - Number Of Customers Signed In Today
   - Signed In Today (%) - Percentage Of Customers Who Signed In Today
   - Excused (Count) - Number Of Customers Excused From Participation
   - Excused (%) - Percentage Of Customers Excused From Participation
   - RB Non Part (Count) - Number Of Customers Referred Back For Not Participating

- RB Non Part (%) - Percentage Of Customers Referred Back For Not Participating
- No Show (Count) - Number Of Customers Failing To Show (Sign In)
- No Show (%) – Percentage Of Customers Failing To Show (Sign In)
- Entered CATS - Number Of Customers Starting Job Search

5. Use the **Up** or **Down** scroll buttons to navigate through the list or enter the desired CSO in the CSO box and the desired date in the From Date box and then click on the **Go** button.

Customer Counts By DSHS Region

1. Click on **Counts/Location** on the Reports tab.
   This displays (by default) the Customer Counts By Office screen.
2. Click on **DSHS Region** at the top of the screen.
   This displays the Customer Counts By Region screen.
3. Enter the desired **Region Number** in the Region box.
4. Click on the **Go** button at the top of the screen.
   This displays data for the Region selected. This report begins from the previous business day and contains the following information:
   - Date - Report Date
   - CSO – Individual CSO Within The Selected Region
   - Due In Today - Number Of Customers Due In Today
   - Signed In Today (Count) - Number Of Customers Signed In Today
   - Signed In Today (%) - Percentage Of Customers Who Signed In Today
   - Excused (Count) - Number Of Customers Excused From Participation
   - Excused (%) - Percentage Of Customers Excused From Participation
   - RB Non Part (Count) - Number Of Customers Referred Back For Not Participating
   - RB Non Part (%) - Percentage Of Customers Referred Back For Not Participating
   - No Show (Count) - Number Of Customers Failing To Show (Sign In)
   - No Show (%) – Percentage Of Customers Failing To Show (Sign In)
   - Entered CATS - Number Of Customers Starting Job Search
5. Use the **Up** or **Down** scroll buttons to navigate through the list or enter the desired Region in the Region box and the desired date in the From Date box and then click on the **Go** button.

Review the Count Detail For A Specific Date

1. Click on **Counts/Location** on the Reports tab.
   This displays (by default) the Customer Counts By Office screen.
2. Select **Office**, **CSO** or **DSHS Region** (see instructions above).
   Use the **Up** and **Down** scroll buttons to navigate through the list or enter a date in the From Date box (near top of screen) and click on the **Go** button.
3. Click on **Select** in front on the date to be reviewed.

4. Click on **Review** on the pop-up menu
   This will display the Count Detail screen with the following information:
   - **Office** – ESD Office Number
   - **CSO –** DSHS CSO Number
   - **DSHS Region** - Region Number
   - **Date** – Count Date
   - **Total Customers** - Number Of Customers In CATS
   - **Signed In - N**umber And Percentage Of Customers Signed In Or Excused
   - **Staff Sign Ins** - Unduplicated Count Of Customers Signed In Or Excused By Staff.
   - **Customer Sign Ins** – Unduplicated Count Of Customers Signed In Or Excused (Excused Absence Line) By The Customer
   - **No Show -** Number And Percentage Of Customers Not Signing In Or Being Excused
   - **One No Show -** Number Of Customers Missing An Appointment During The Current Month
   - **RB Non Participating:** Number And Percentage Of Customers Referred Back To DSHS By CATS For Two Unexcused Absences During The Current Calendar Month (Not Included Are Customers Referred Back Manually)
   - **Override Requested:** Numbers Of Customers With An Override On Attendance Requirements (Not Reporting Daily)
   - **Excused:** Number And Percentage Of Customers Excused From Attendance
   - **Entered CATS:** Number Of Customers Added To CATS By Opening A Job Search Component
   - **Due In Next Day:** Number Of Customers Due In The Next Business Day
   - **Activity Values/Count:** Number Of Customers Signed In For Each Activity. All Activities Selected By A Customer When Signing In Are Totaled In These Counts. Therefore, The Total Of All The Activities Can Be Greater Than The Number Of Customers Signed In.

Download Customer Counts Detail

1. Click on **Counts/Location** on the Reports tab.
   This displays (by default) the Customer Counts By Office screen.
2. Select **Office**, **CSO** or **DSHS Region** (see instructions above).
3. Click on the **Download** button at the top of the screen.
   A File Download pop-up box will appear with two options.
4. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
   For either option the Excel spreadsheet will contain the following information:
   - Date
   - CSO
   - DSHS Region

- Total Customers
- Due In Today
- Signed In Today
- Signed In Percentage
- Excused
- Excused Percentage
- Due In Next Day
- Staff Sign Ins
- Customer Sign Ins
- No Show
- No Show Percentage
- RB Non Participation
- RB Non Participation Percentage
- One No Show
- Override Requested
- Entered CATS
- Activity JB
- Activity JC
- Activity JW
- Activity RR/JS

Counts By Date

This CATS report tracks daily activities by Date and Office, CSO or DSHS region. Data is displayed for the past 45 business days.

Customer Counts By Date And Office

1. Click on **Counts/Date** on the Reports tab.
   This displays (by default) the Customer Counts By Date And Office screen.
2. Enter the desired **Date** in the Date box (defaults to the previous business day).
3. Enter the desired **3-digit Office Number** in the Start From Office box.
4. Click on the **Go** button. This displays the following information for the Date and Office requested:
   - Office – List begins with the selected office
   - CSO - Attached To The Office (some offices have multiple CSOs)
   - Due In Today - Number Of Customers Due In Today
   - Signed In Today (Count) - Number Of Customers Signed In Today
   - Signed In Today (%) - Percentage Of Customers Who Signed In Today
   - Excused (Count) - Number Of Customers Excused From Participation
   - Excused (%) - Percentage Of Customers Excused From Participation
   - RB Non Part (Count) - Number Of Customers Referred Back For Not Participating
   - RB Non Part (%) - Percentage Of Customers Referred Back For Not Participating
   - No Show (Count) - Number Of Customers Failing To Show (Sign In)

- No Show (%) – Percentage Of Customers Failing To Show (Sign In)
- Entered CATS - Number Of Customers Starting Job Search

5. Use the **Up** or **Down** scroll buttons to navigate through the list or enter the desired date in the Date box and the desired office in the Start From Office box and then click on the **Go** button.

Customer Counts by Date and CSO

1. Click on **Counts/Date** on the Reports tab.
   This displays (by default) the Customer Counts by Date and Office screen.
2. Click on **CSO** at the top of the screen.
   This displays the Customer Counts by Date And CSO screen.
3. Enter the desired **Date** in the Date box (defaults to the previous business day).
4. Enter the desired **3-digit CSO Number** in the Start from CSO box.
5. Click on the **Go** button.
   This displays the following information for the Date and CSO requested:
   - CSO – List Begins With The Selected CSO (Some Offices Have Multiple CSOs)
   - Office – Displays Office Attached To A CSO
   - Due In Today - Number Of Customers Due In Today
   - Signed In Today (Count) - Number Of Customers Signed In Today
   - Signed In Today (%) - Percentage Of Customers Who Signed In Today
   - Excused (Count) - Number Of Customers Excused From Participation
   - Excused (%) - Percentage Of Customers Excused From Participation
   - RB Non Part (Count) - Number Of Customers Referred Back For Not Participating
   - RB Non Part (%) - Percentage Of Customers Referred Back For Not Participating
   - No Show (Count) - Number Of Customers Failing To Show (Sign In)
   - No Show (%) – Percentage Of Customers Failing To Show (Sign In)
   - Entered CATS - Number Of Customers Starting Job Search
6. Use the **Up** or **Down** scroll buttons to navigate through the list or enter the desired date in the Date box and the desired CSO in the Start From CSO box and then click on the **Go** button.

Customer Counts by Date and DSHS Region

1. Click on **Counts/Date** on the Reports tab.
   This displays (by default) the Customer Counts by Date and Office screen.
2. Click on **DSHS Region** at the top of the screen.
   This displays the Customer Counts by Date and DSHS Region screen.
3. Enter the desired **Date** in the Date box (defaults to the previous business day).
4. Enter the desired **Region Number** in the Start from Region box.
5. Click on the **Go** button. This displays the following information for the Date And DSHS Region requested:
   - Region – List Begins With The Selected DSHS Region

- CSO – Displays CSOs Attached To Each DSHS Region
- Due In Today - Number Of Customers Due In Today
- Signed In Today (Count) - Number Of Customers Signed In Today
- Signed In Today (%) - Percentage Of Customers Who Signed In Today
- Excused (Count) - Number Of Customers Excused From Participation
- Excused (%) - Percentage Of Customers Excused From Participation
- RB Non Part (Count) - Number Of Customers Referred Back For Not Participating
- RB Non Part (%) - Percentage Of Customers Referred Back For Not Participating
- No Show (Count) - Number Of Customers Failing To Show (Sign In)
- No Show (%) – Percentage Of Customers Failing To Show (Sign In)
- Entered CATS - Number Of Customers Starting Job Search

6. Use the **Up** or **Down** scroll buttons to navigate through the list or enter the desired date in the Date box and the desired region in the Start From Region box and then click on the **Go** button.

Review the Count Detail for a Specific Date

1. Click on **Counts/Date** on the Reports tab.
2. Select **Office**, **CSO** or **DSHS** region.
   Use the **Up** and **Down** scroll buttons to navigate though the list.
3. Click on **Select** in front on the date to be reviewed.
4. Click on **Review** on the pop-up menu.
   This will display the Count Detail screen with the following information:
   - **Office** – ESD Office Number
   - **CSO –** DSHS CSO Number
   - **DSHS Region** - Region Number
   - **Date** – Count Date
   - **Total Customers** - Number Of Customers In CATS
   - **Signed In - N**umber And Percentage Of Customers Signed In Or Excused
   - **Staff Sign Ins** - Unduplicated Count Of Customers Signed In Or Excused By Staff.
   - **Customer Sign Ins** – Unduplicated Count Of Customers Signed In Or Excused (Excused Absence Line) By The Customer
   - **No Show -** Number And Percentage Of Customers Not Signing In Or Being Excused
   - **One No Show -** Number Of Customers Missing An Appointment During The Current Month
   - **RB Non Participating:** Number And Percentage Of Customers Referred Back To DSHS By CATS For Two Unexcused Absences During The Current Calendar Month (Not Included Are Customers Referred Back Manually)
   - **Override Requested:** Numbers Of Customers With An Override On Attendance Requirements (Not Reporting Daily)
   - **Excused:** Number And Percentage Of Customers Excused From Attendance
   - **Entered CATS:** Number Of Customers Added To CATS By Opening A Job Search Component
   - **Due In Next Day:** Number Of Customers Due In The Next Business Day
   - **Activity Values/Count:** Number Of Customers Signed In For Each Activity. All Activities Selected By A Customer When Signing In Are Totaled In These Counts. Therefore, The Total Of All The Activities Can Be Greater Than The Number Of Customers Signed In.

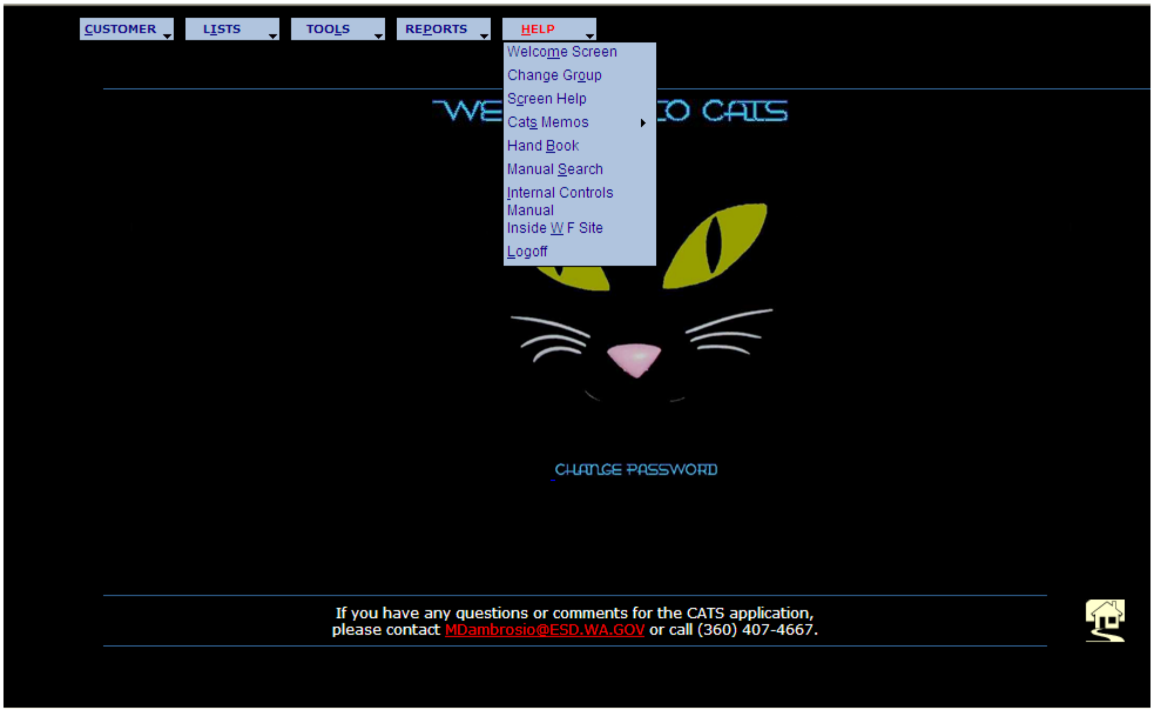
Download The Counts By Date

1. Click on **Counts/Date** on the Reports tab.
   This displays (by default) the Customer Counts By Date And Office screen.
2. Select **Office**, **CSO** or **DSHS Region** (see instructions above).
3. Click on the **Download** button at the top of the screen.
   A File Download pop-up box will appear with two options.
4. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a disk). Choosing the **Save** option displays a Save As pop-up

box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.
For either option the Excel spreadsheet will contain the following information:

- Office
- CSO
- DSHS Region
- Total Customers
- Due In Today
- Signed In Today
- Signed In Today Percentage
- Excused
- Excused Percentage
- Staff Sign Ins Today
- Customer Sign Ins Today
- No Shows
- No Shows Percentage
- RB'd Non Participation
- RB'd Non Participation Percentage
- One No Show
- Override Requested
- Entered CATS
- Activity JB
- Activity JC
- Activity JW
- Activity RR/JS

Help Menu



Screen Help

Cats Memos

Hand Book

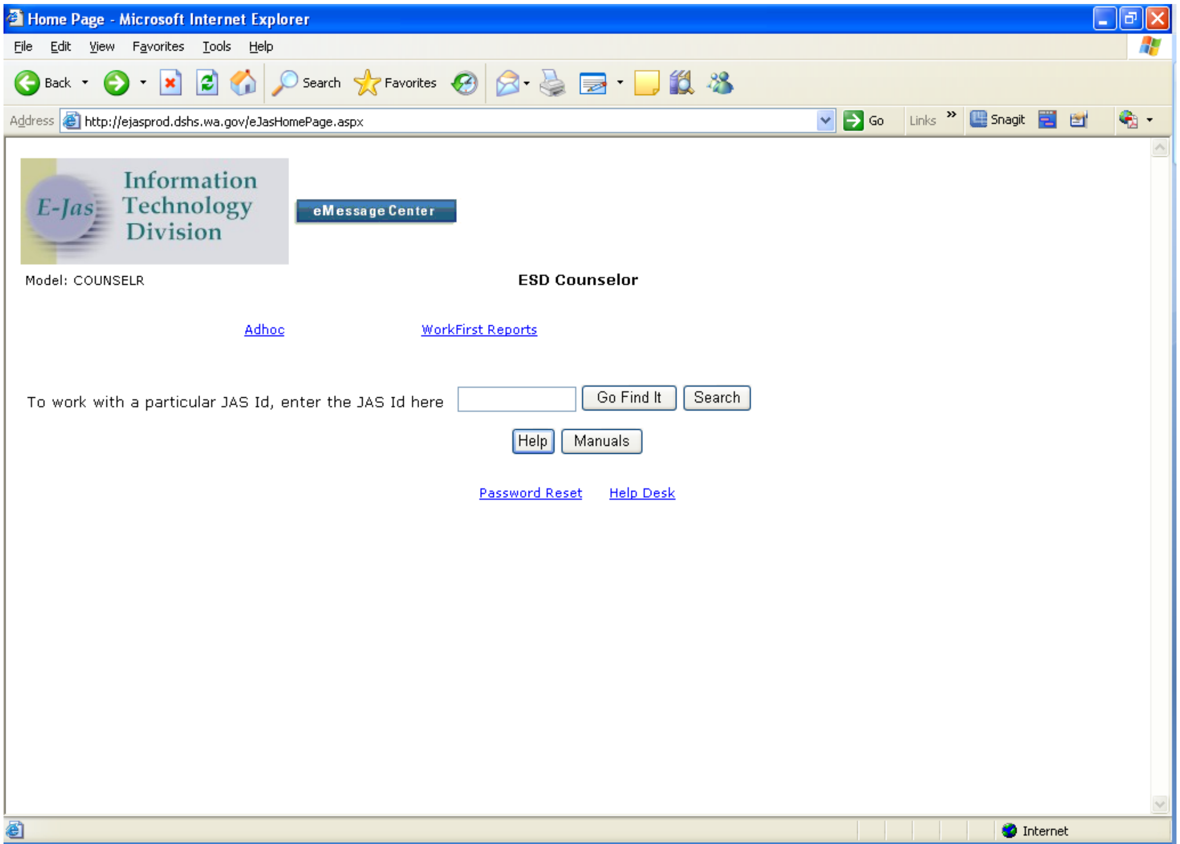
Manual Search

Internal Controls Manual

Inside WF Site

Logoff

eJAS (electronic Jobs Automated System)



Client Main Menu

To select a **specific client:**

Go to eJAS Home and enter the client's JAS identification number; then click on "Go Find It."

Or, have eJAS find the client record by clicking on "Search" and filling in the information you know on the Search form.

Click on the client's name. eJAS displays the Client Main Menu.

Click on the client's name in the Main Menu. eJAS displays the Client Demographics page for that client.

Returning to the Client Main Menu from one of the pages you selected is easy. Most of the pages you select from the Client Main Menu have a "Main" button - click on it to return to the Main Menu.

You can also return to the Main Menu by using the "Back" button on your Internet Explorer toolbar.

Component/IRP Information

Displays the TANF/SFA client's active components (activities), assigned contractor for a component if any, the Fair Labor Standards Act (FLSA) hours, Employment hours recorded in ACES on the EARN screen, number of days in IE (Infant Exemption component), P to E Participation Status, and Individual Responsibility Plan (IRP).

How do I add a Component?

1. On the **Component/Contactor/IRP Update** screen, click the **Add a Component** button. Enter the two-letter component code in the **Component** field, or click the question mark ( ) next to the component field to select the correct component from the Component **Help** screen.

2. Next to the component code, enter the Start date, the number of hours per week of participation required of the client for the activity, the Scheduled End date, and the applicable Worker ID.

How do I view the Client's Historical Components?
From the **Component/Contractor/IRP Update** screen, click the **Component History** button. The Component History page displays all the client's active, closed, and inactive components.

- Active components display an "A" in the **St** field.
- Closed components display a "C" in the **St** field.
- Inactive components display an "I" in the **St** field. Inactive components are components that have been updated or modified. For example, if you extend the Scheduled End date of the client's FT - Full Time component, the FT component with the original Scheduled End date then displays as an inactive component in the **Component History** page.
- If a component was referred back or rejected, the contractor Refer back reason will display in the **Refer Back/Reject Reason** column.

St	Comp	Desc	Start	Sched End	Actual End	Hrs	ESD Worker	DSHS Worker	CC	Tran Date	Refer Back/ Reject Reason
C	CW	COMMUNITY	08/18/2009	08/18/2009	08/18/2009	10		054BRM	NS	08/19/2009	REJECTED-No Contact/No Show
	ZZY--00/00/0000-08/18/2009										
C	WE	WORK EXPER	08/18/2009	08/18/2009	08/18/2009	10		054BRM	CS	08/19/2009	Refer Back-Parent Has No Childcare
	ZZZ--08/18/2009-08/18/2009										
C	RB	REFERRED B	08/18/2009	08/18/2009	08/18/2009	00	0544XP	054BRM	NS	08/19/2009	Refer Back-Parent Refuses to Participate

<u>Client Demographics</u>
Click on the client's name (link) and the **Client Demographics** page displays.

How do I enter new employment information?

1. Click **Employment Information** from the client's main menu.
2. Click the **Add Employment** button which opens up a new Employment Open/Change screen.
3. Fill in the following boxes:
   - Employer/Worksite Name
   - Employer/Worksite Address
   - City, State and Zip
4. Select an **Employment Code** from the Employment Codes and Descriptions menu[ ]
5. Select a **Subsidized Code** from the Subsidized Codes and Descriptions menu [ ]
6. Select a **Job Code** from the Job Codes and Descriptions menu [ ]
7. Select an **Insurance Code** from the Insurance Codes and Descriptions menu [ ]
8. Enter the following fields:
   - Hours per Week
   - Reported Wage
   - Contact Person
   - Contact Phone
   - Actual Start Date
   - UBI
9. Select the **Job Type** (For CJ Users only)
10. Select the **Benefits** the client is receiving (Press **CTRL** key first to select multiple benefits or to de-select a benefit).
11. Click the **Create** button to save the information.
12. Clicking the **Back** button will take you back to the Active Employment Screen without saving anything you may have entered.

Note: Entered Employment information from eJAS is collected to meet out performance based contract goals with DSHS.

How do I make employment information changes?

1. Select the **Employment Information** link from the client's main menu which takes you to the Active Employment screen.
2. Select the **Employer Name** that you wish to update. This will open up the Employment Open/Change screen.
3. Make changes as necessary and then click the **Update** button to save the changes.
4. Clicking the **Back** button returns the user to the Active Employment Screen without saving the information.
5. If the client is no longer working at this Employer/Worksite, users should update the following fields:
   - Termination Date
   - Termination Code

- Effective Date

How do I get back to the Main Menu or the Home page?

To exit the Employment Detail, Employment History or the Active Employment screens:

1. Click the **Back** button which will take you to the previous screen
2. Click the **Main** button which will take you back to the Client Main Menu, or
3. Click the **Home** button which will take you back to the eJAS Home Page.

How do I add a note?

1. Click the **Add New JAS Notes** button and the **Create Notes** page displays.
2. Select an issue type and click the **Begin Notes** button.
   - Enter notes up to 58 lines. When finished with the note, click the **Continue with Notes List** button.

How do I search notes?

To search notes take the following steps:

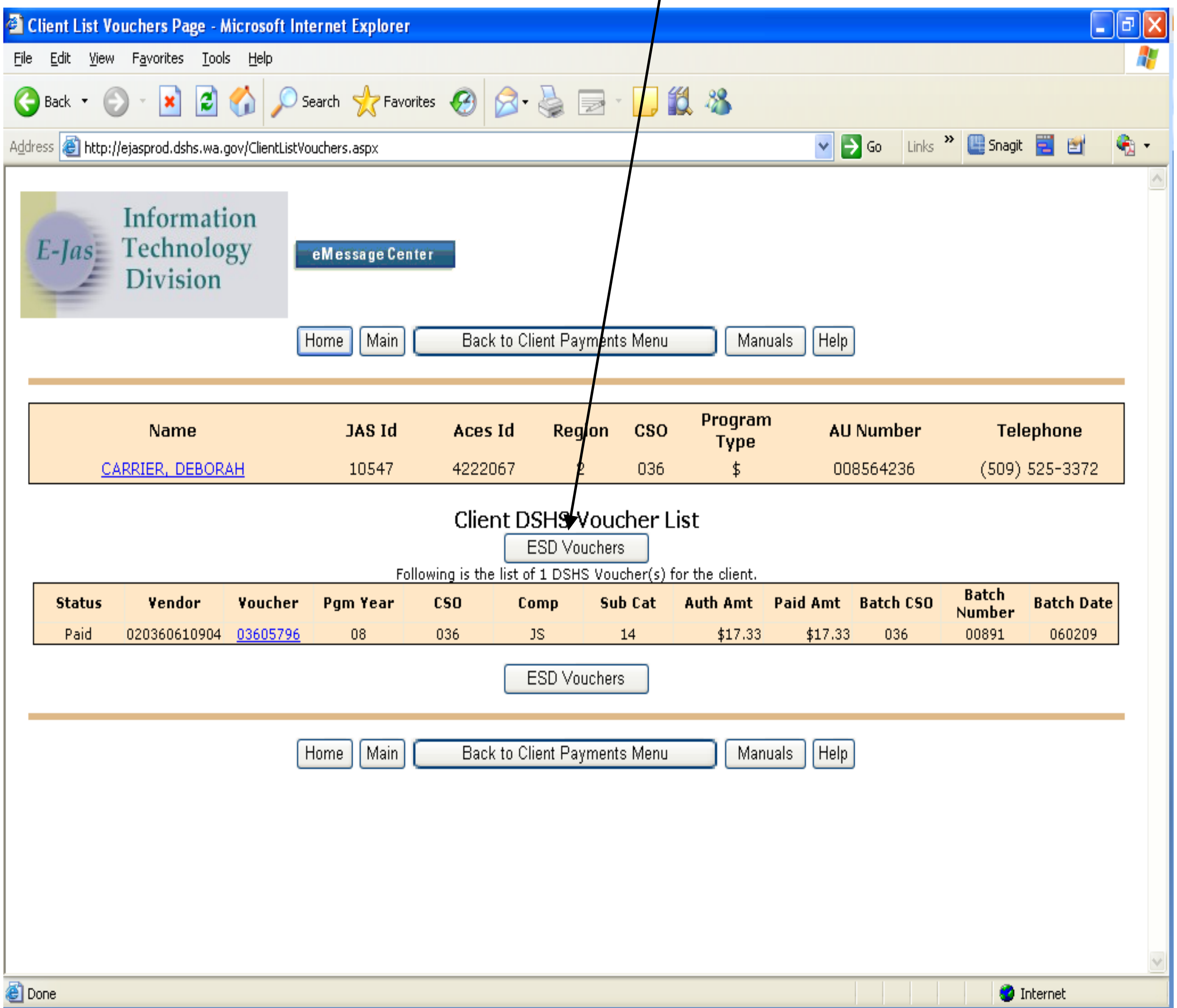
1. From the client's **main page,** click the **Client Notes** link and the **JAS Notes** page displays.
2. On the **JAS Notes** page:
   - Click the **Note/CE/Assessment Search** link and the **Note/CE/Assessment Search** page displays.
3. On the **Note/CE/Assessment Search** page:
   - Select at least one, or multiple **Primary Selection Options**.
   - Once a Primary Selection has been made **Secondary Selection Options** display. Select at least one, or multiple, **Secondary Selection Options**.
   - Enter a **[begin date]** in the **Notes from** field and an **[end date]** in the **to** field for a specific date range search if applicable.
   - Click **Search** and the **Note/CE/Assessment Search Results for** page displays with queried notes.

   Assessment notes include both Assessment Plan and Assessment General Notes.

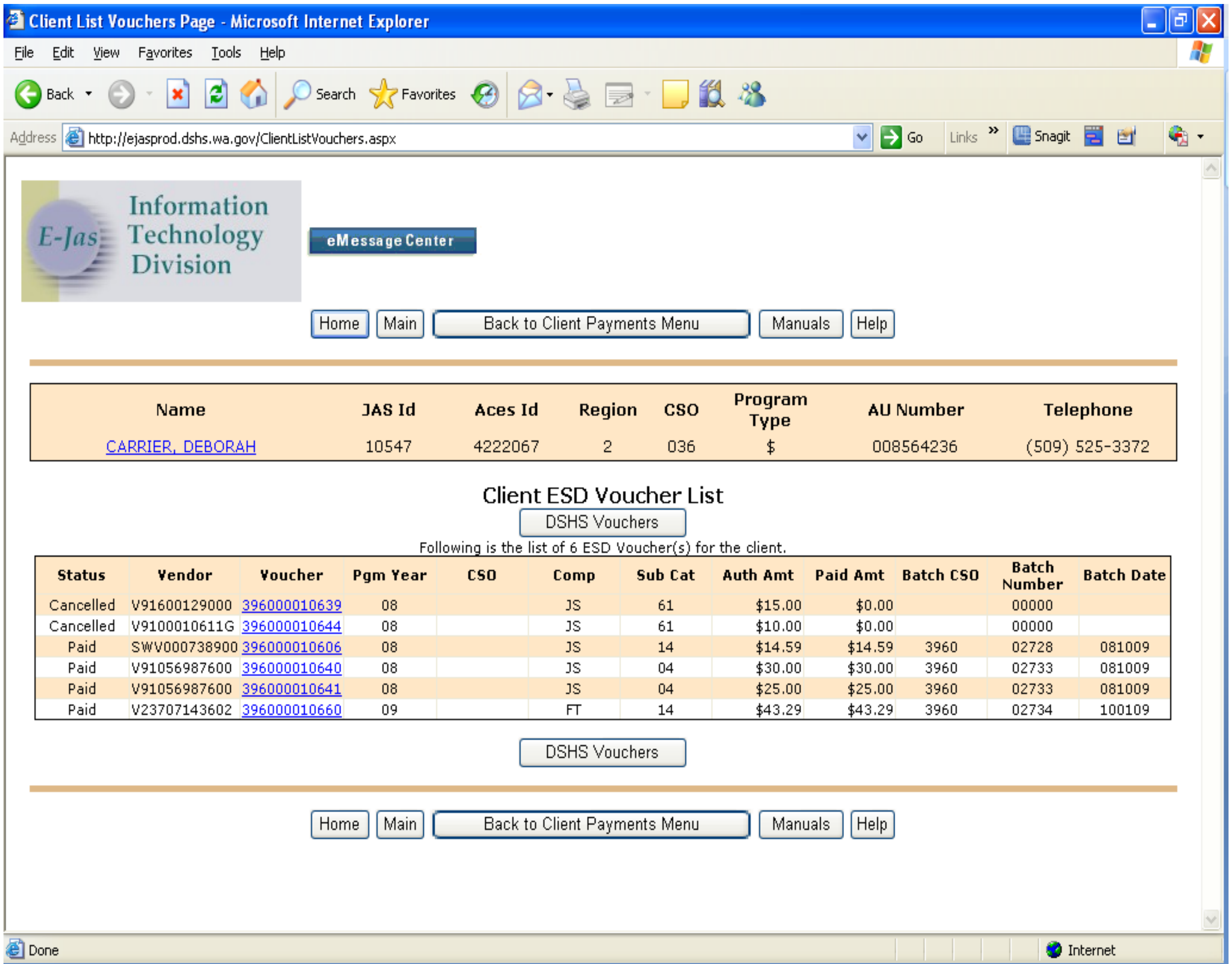
Payment

Client Voucher Review

View vouchers issues to participant by DSHS and ESD



Client ESD Voucher List



Client List Vouchers Page - Microsoft Internet Explorer

http://ejasprod.dshs.wa.gov/ClientListVouchers.aspx

E-Jas Information Technology Division

eMessage Center

Home | Main | Back to Client Payments Menu | Manuals | Help

Name	JAS Id	Aces Id	Region	CSO	Program Type	AU Number	Telephone
CARRIER, DEBORAH	10547	4222067	2	036	$	008564236	(509) 525-3372

Client ESD Voucher List

DSHS Vouchers

Following is the list of 6 ESD Voucher(s) for the client.

Status	Vendor	Voucher	Pgm Year	CSO	Comp	Sub Cat	Auth Amt	Paid Amt	Batch CSO	Batch Number	Batch Date
Cancelled	V91600129000	396000010639	08		JS	61	$15.00	$0.00		00000	
Cancelled	V9100010611G	396000010644	08		JS	61	$10.00	$0.00		00000	
Paid	SWV000738900	396000010606	08		JS	14	$14.59	$14.59	3960	02728	081009
Paid	V91056987600	396000010640	08		JS	04	$30.00	$30.00	3960	02733	081009
Paid	V91056987600	396000010641	08		JS	04	$25.00	$25.00	3960	02733	081009
Paid	V23707143602	396000010660	09		FT	14	$43.29	$43.29	3960	02734	100109

DSHS Vouchers

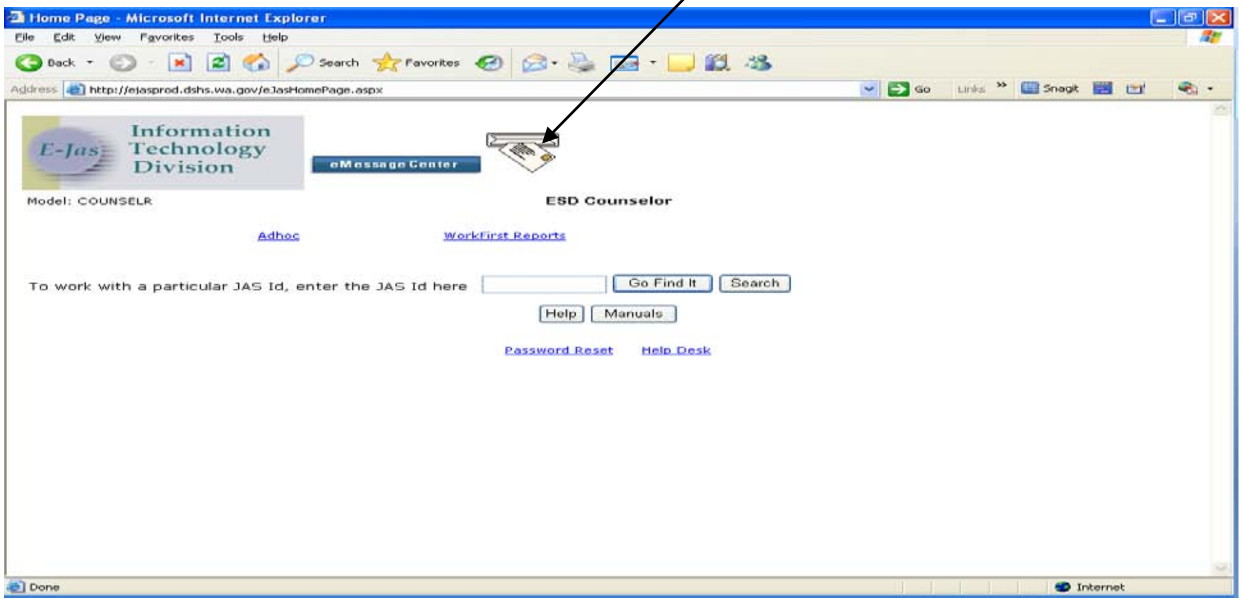
Home | Main | Back to Client Payments Menu | Manuals | Help

Done | Internet

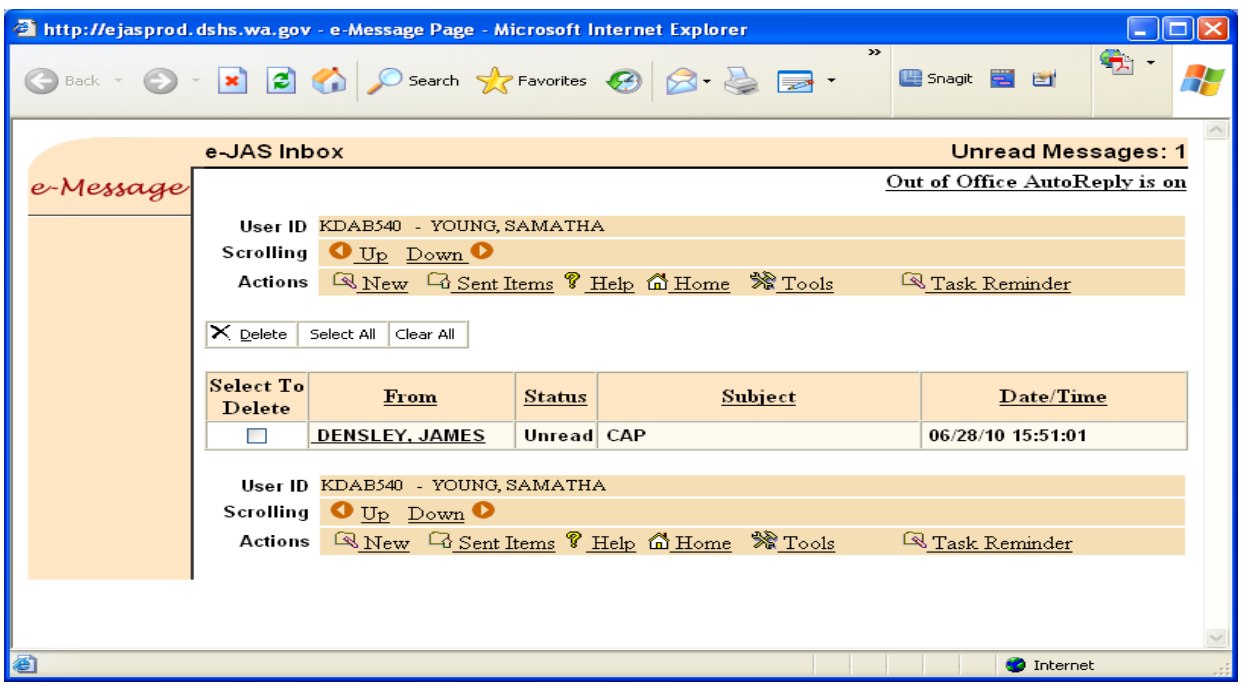
Displayed is the status of the voucher (Cancelled, Issued, Paid), Vendor ID, Program Year the voucher was issued, Component, Sub category, Authorized amount, Paid Amount, Batch Number and Bath date.

You must review both DSHS and ESD Vouchers to determine the total dollar amount spent for each participant.

eMessage – When an envelope appears next to the eMessage Center you have messages. To view or send messages click the envelope.

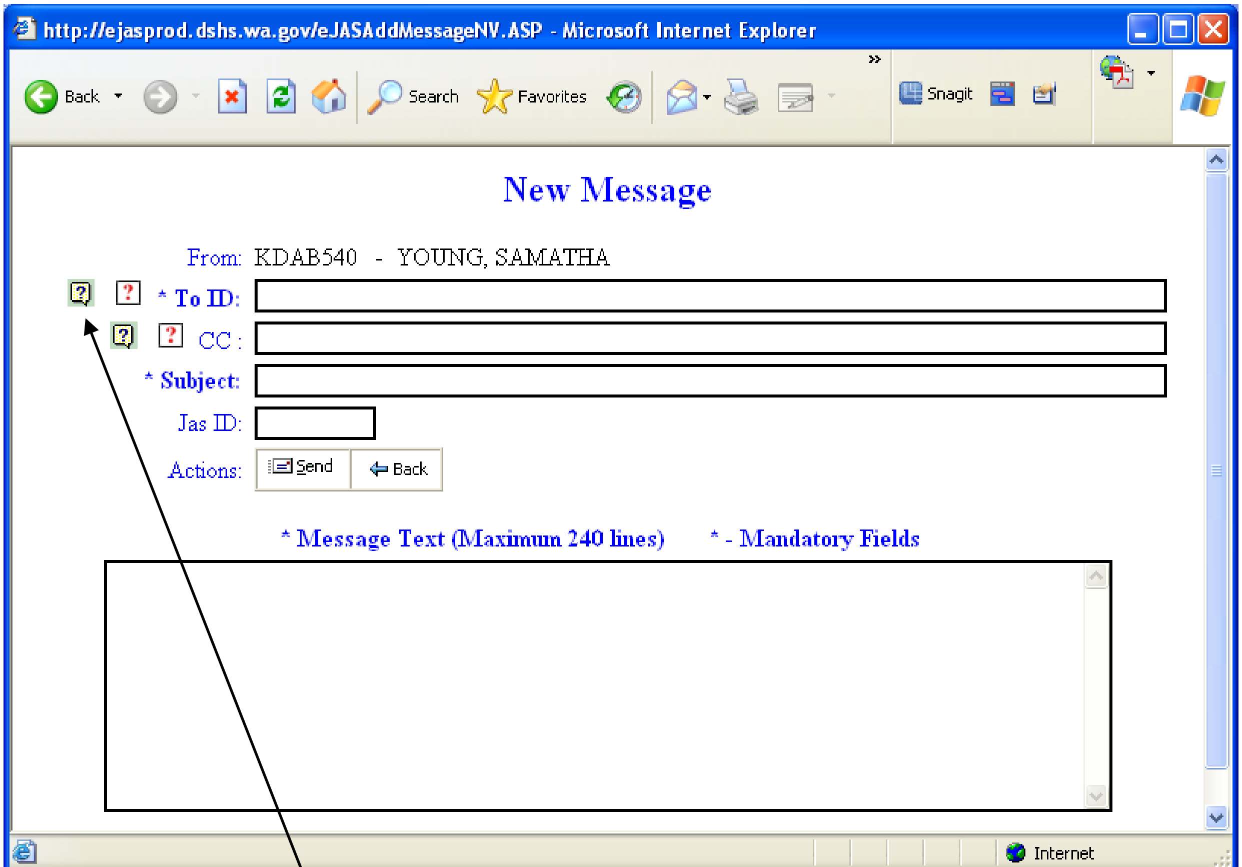


eJAS Inbox



To send a message using the Action Bar

Click on New



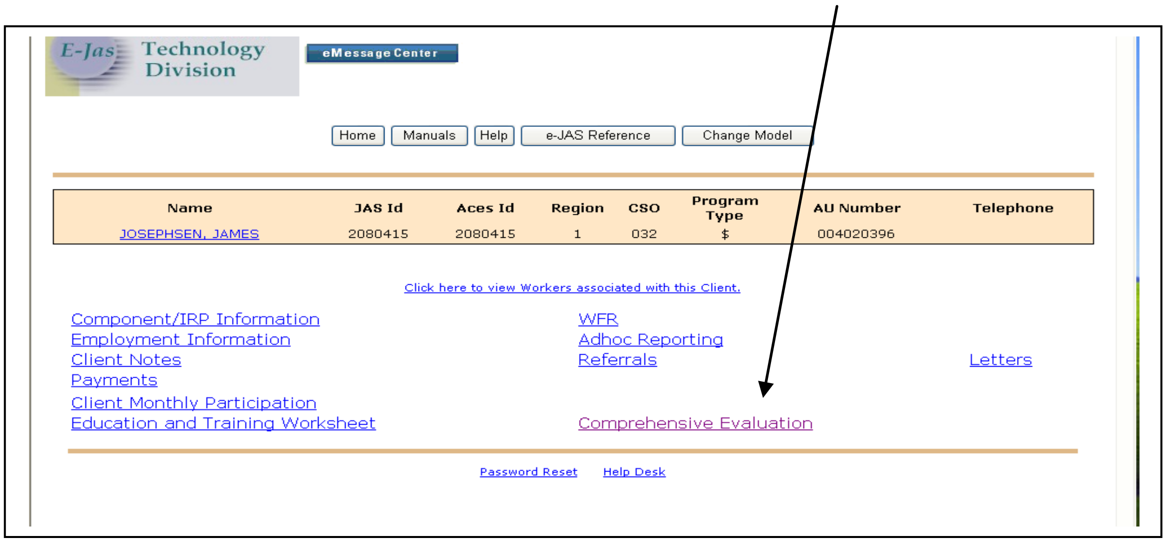
To find the ID # click on 

Type in the Subject, Jas ID and in the Message Text type the message

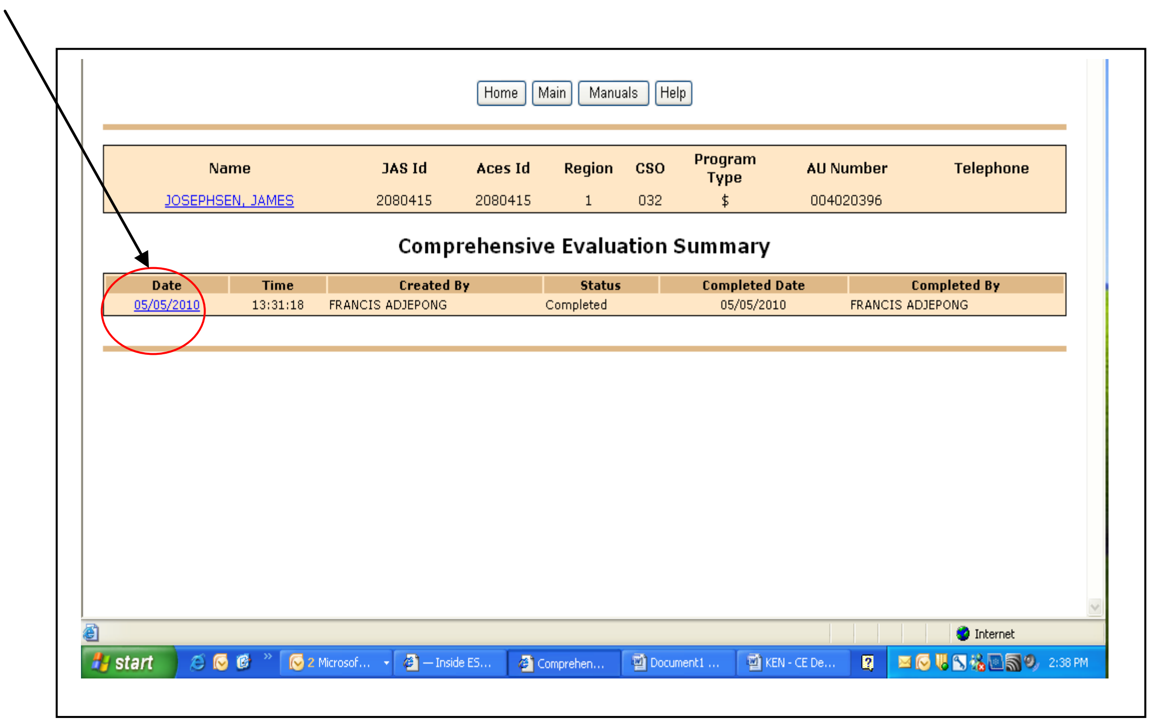
To send eMessage Click on **Send**

Comprehensive Evaluation - Step by step guide

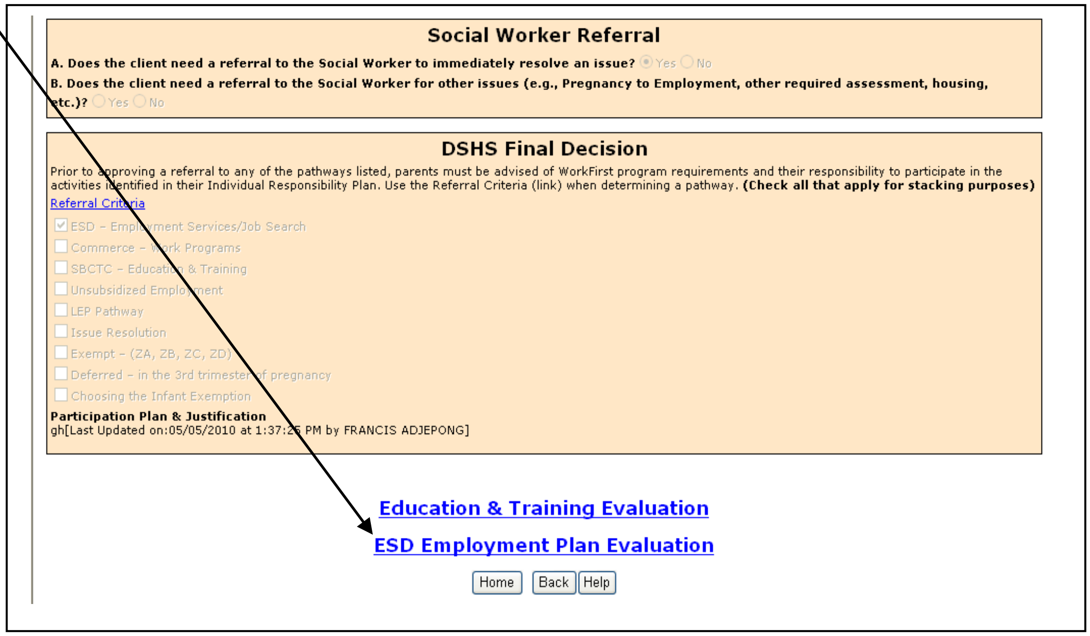
You can access the Comprehensive Evaluation (CE) through CATS or directly from eJAS. From the eJAS home page, select “Comprehensive Evaluation.”



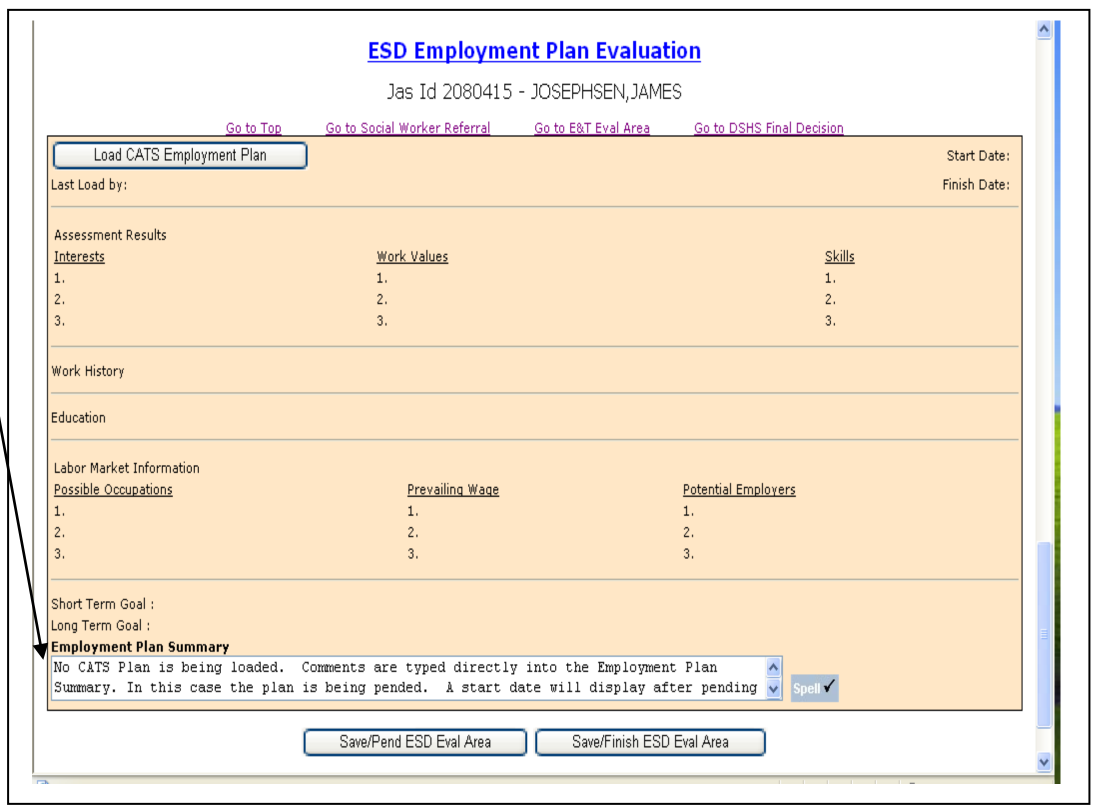
From the Comprehensive Evaluation Summary Page, click on the highlighted “Date” for the CE you want to review.



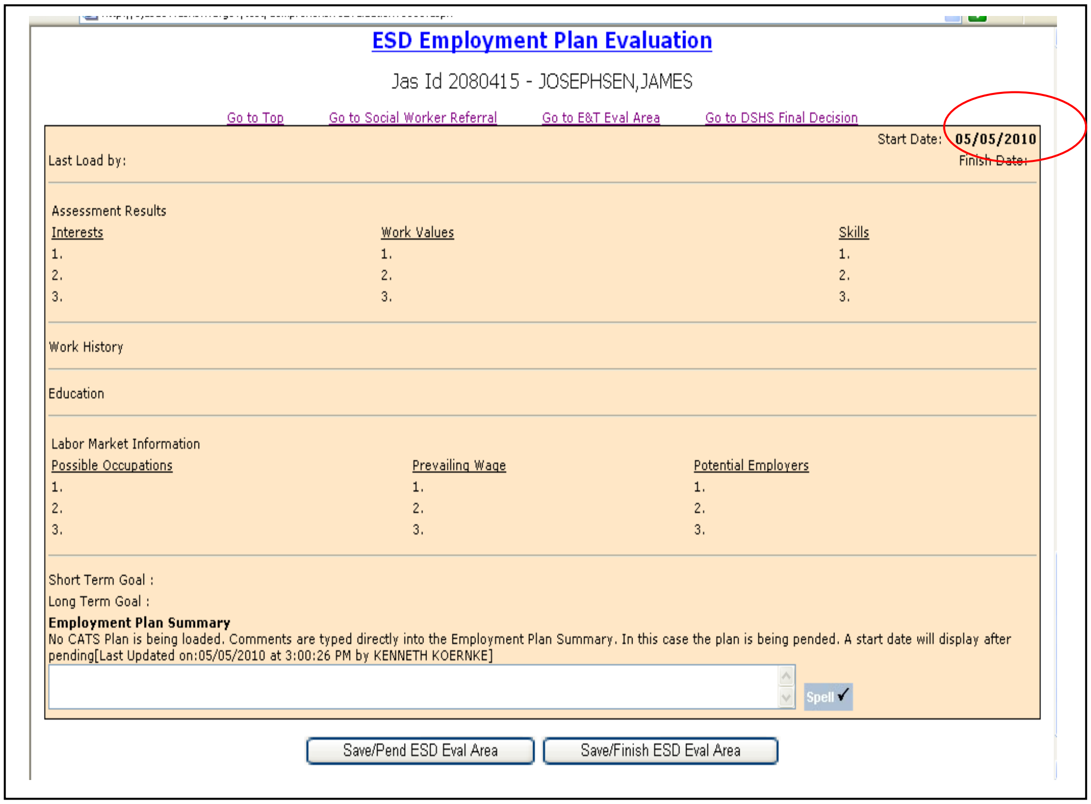
In the CE section, scroll down to the bottom of the page and select "ESD Employment Plan Evaluation"



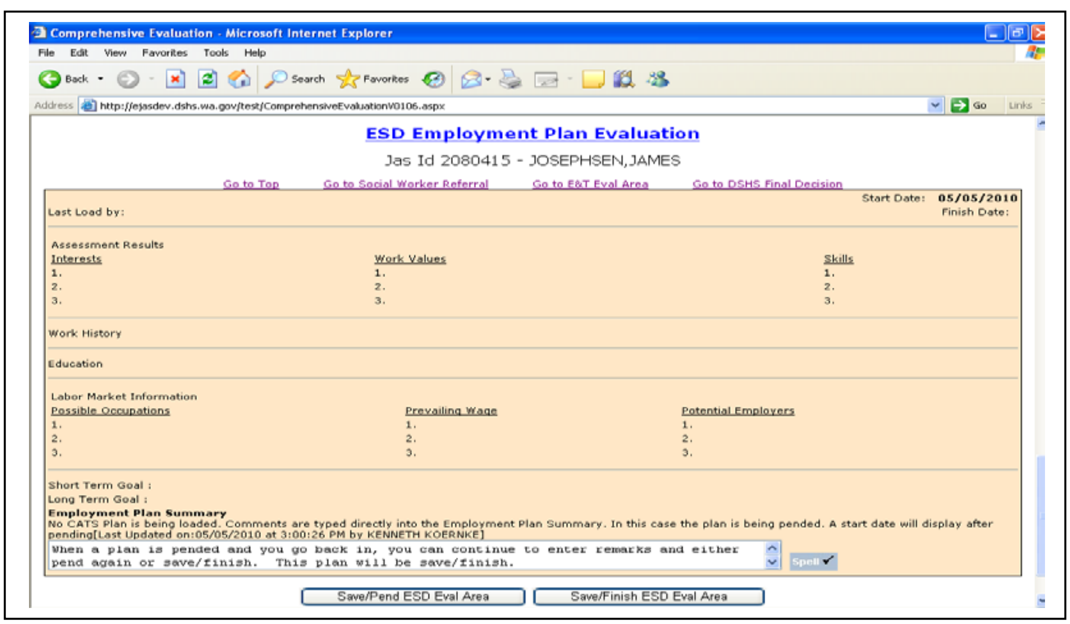
Type directly into the "Employment Plan Summary" section without having to Load an Employment Plan from CATS.



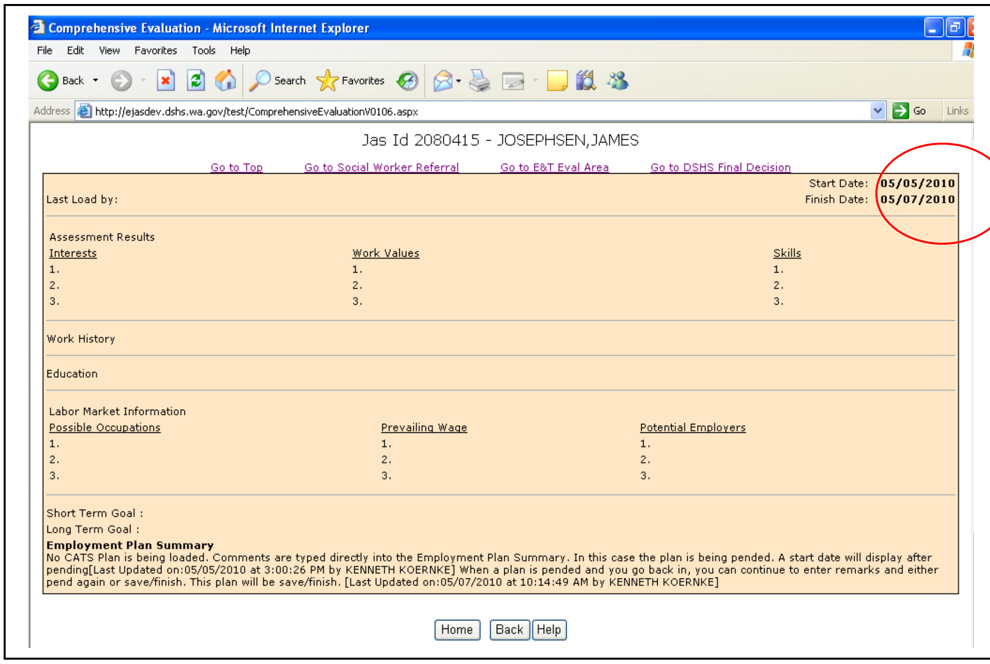
The Employment Plan Summary below has been pended. A start date has now been added. You can pend more than once, but the start date will remain the first date pended.



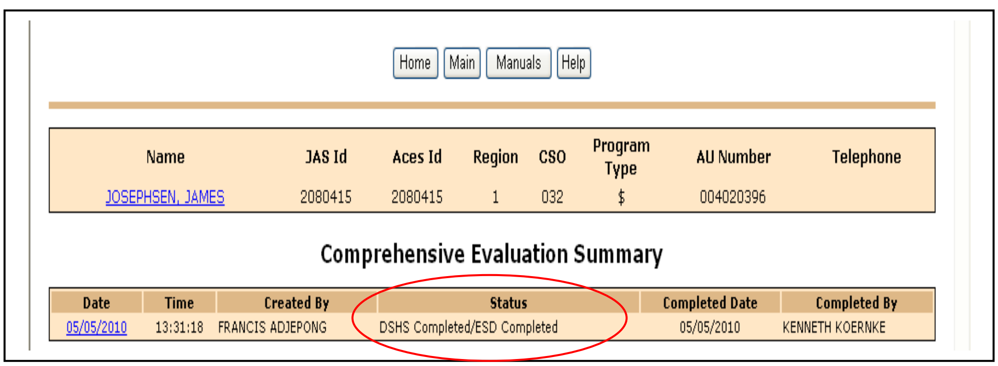
Below is an Employment Plan Summary that has been pended more than once.



Below is a complete Employment Plan Summary. Remember, you still must click the Save/Finish Button to finish. If you do not want to pend the Employment Plan Summary, you can enter the Employment Plan Summary information and click the "Save/Finish" button. The Start Date and the Finish Date will be entered as the same date.



The Comprehensive Evaluation Summary page will now show in the status column that DSHS has completed their section and that ESD has completed their section.



Remember – DSHS must complete their section before either the college or ESD can complete their section.

If you need to change or delete an Employment Plan Summary, you must contact the ESD WorkFirst Administrative Unit.

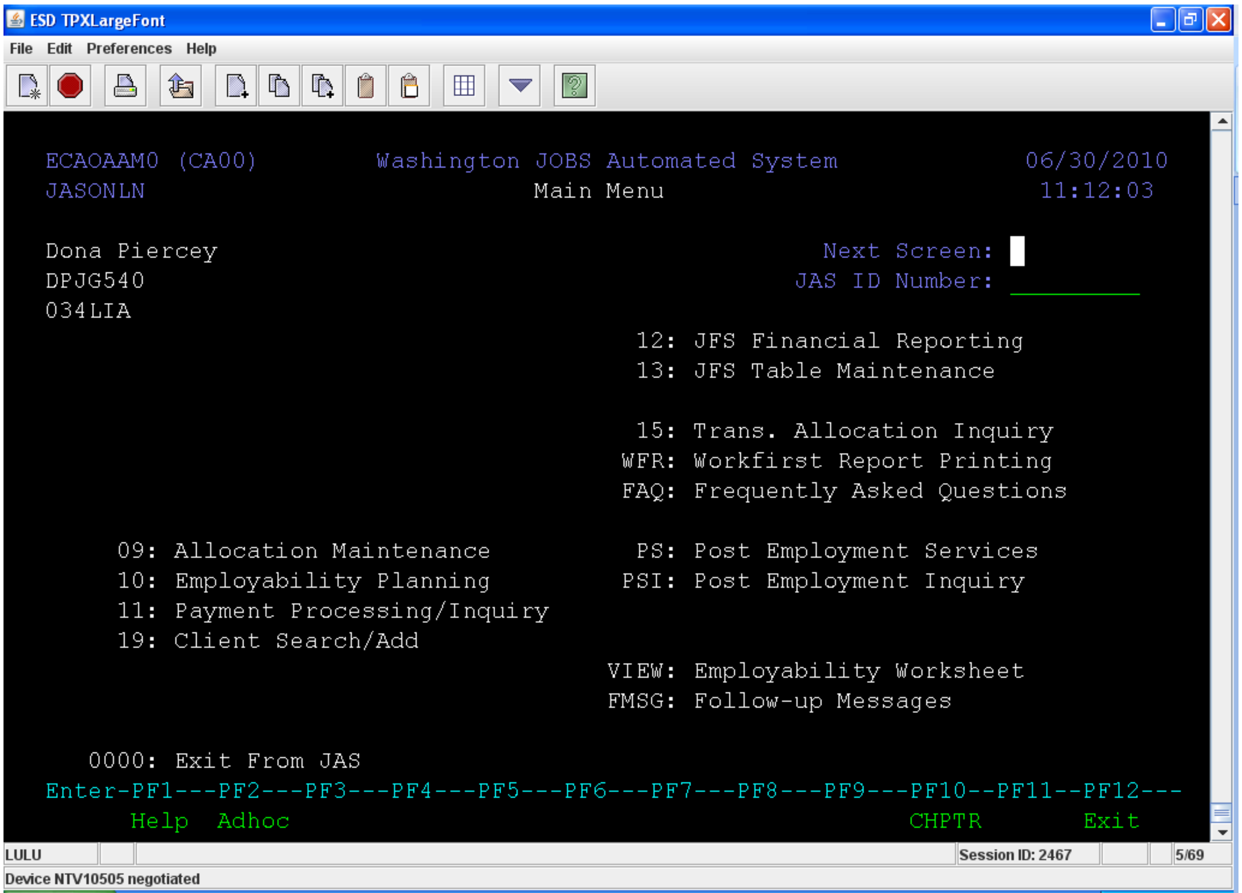
Notes in eJAS

- When a participant does not meet participation (unexcused absences). Document your attempts to contact the participant, any interventions, interviews or discussions to correct or improve participation.
- When you refer back (RB) a participant, document the reason why. Include a recommendation for other activities.
- When you authorize support services: document in compliance with the detailed instructions in the Internal Controls Manual and the Support Services Directory.
- When you write an On-The Job Training contract.
- When you write a WEX contract.

JAS (Jobs Automated System)

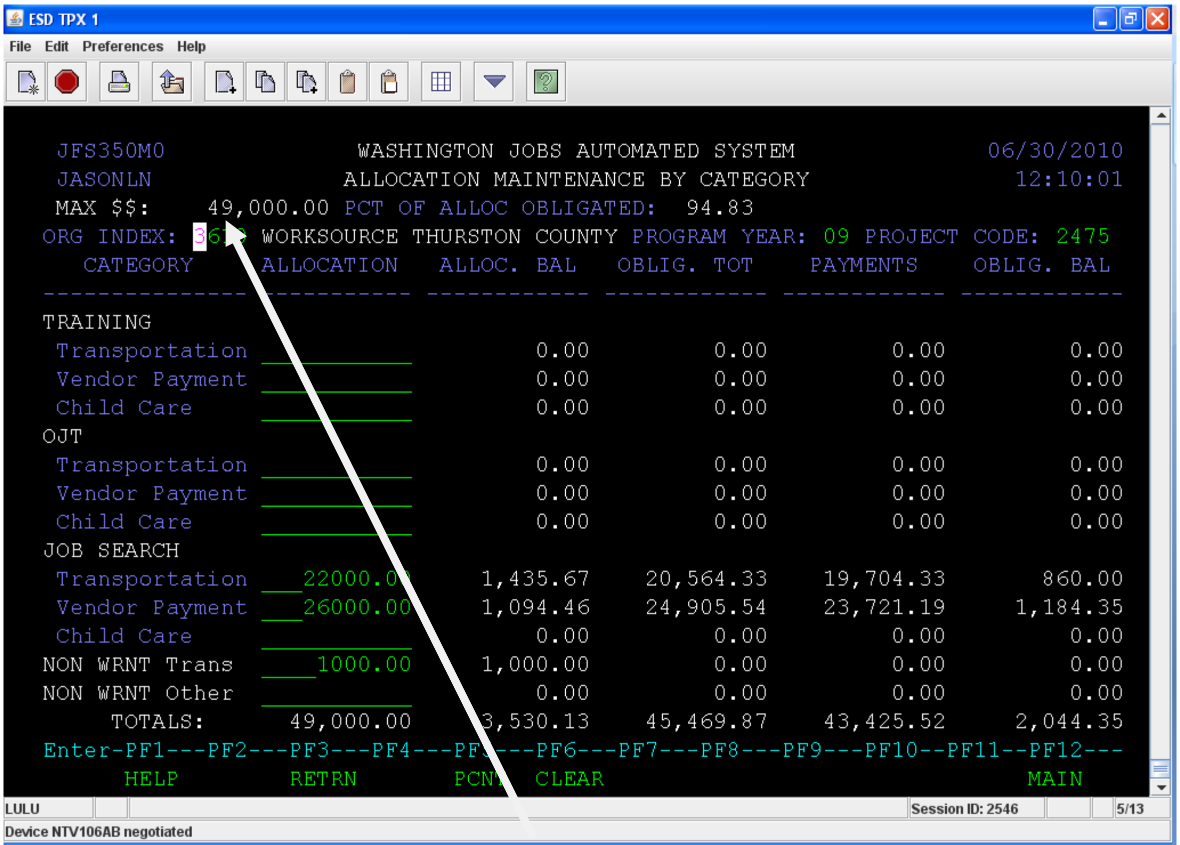
Use this section as a companion to the Internal Controls Manual. This section provides more detail.

Main Menu Screen:



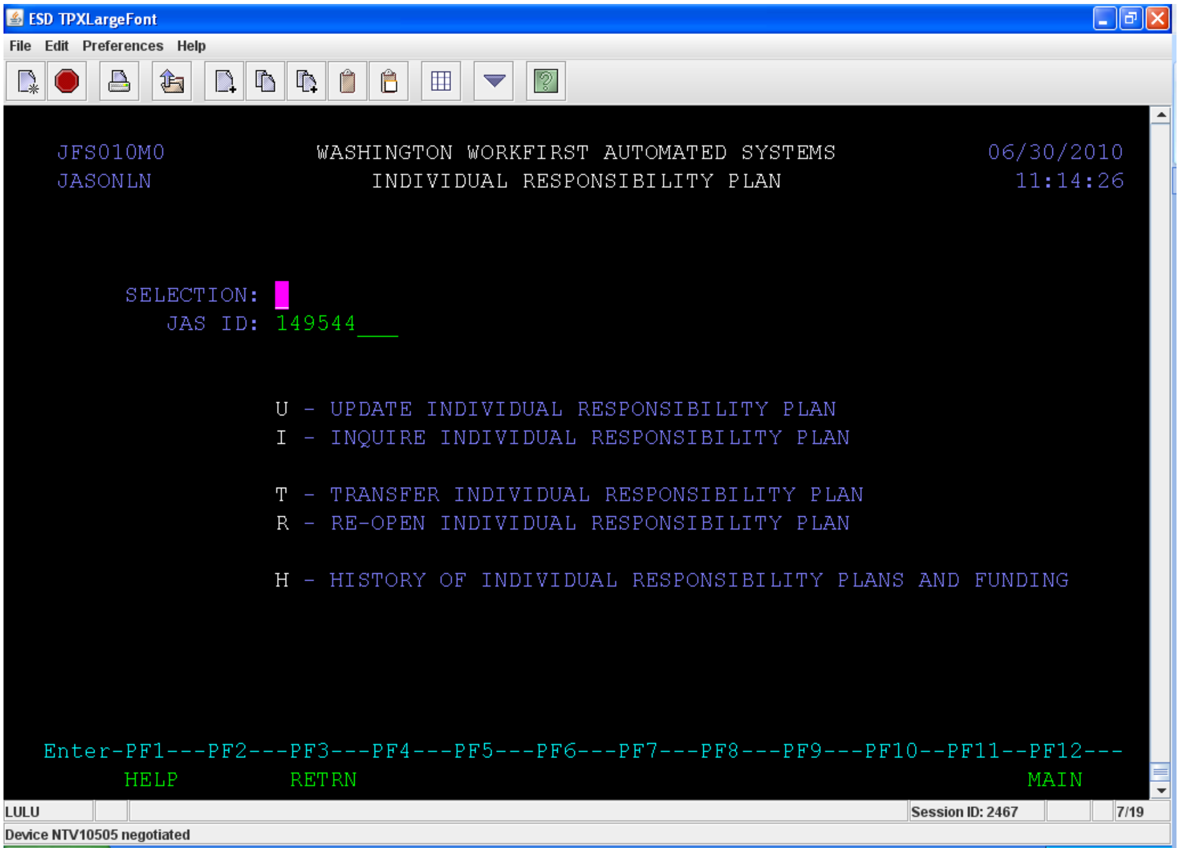
09 Screen - Allocation Maintenance Screen

Use the 09 screen to see where WorkFirst Support Service money is allocated. WorkFirst Administrators and Supervisors are the only local office workers authorized to move money.



1. Tab to the ORG INDEX field and type in your office.
2. Tab to the Program Year field and type in the two digit program year. (Example 10 for 2010).
3. Tab to the Project code field and type in the four digit project code. (Example 2475 – WorkFirst and 2345 – OJT Employer Reimbursement)
4. Press the enter Key

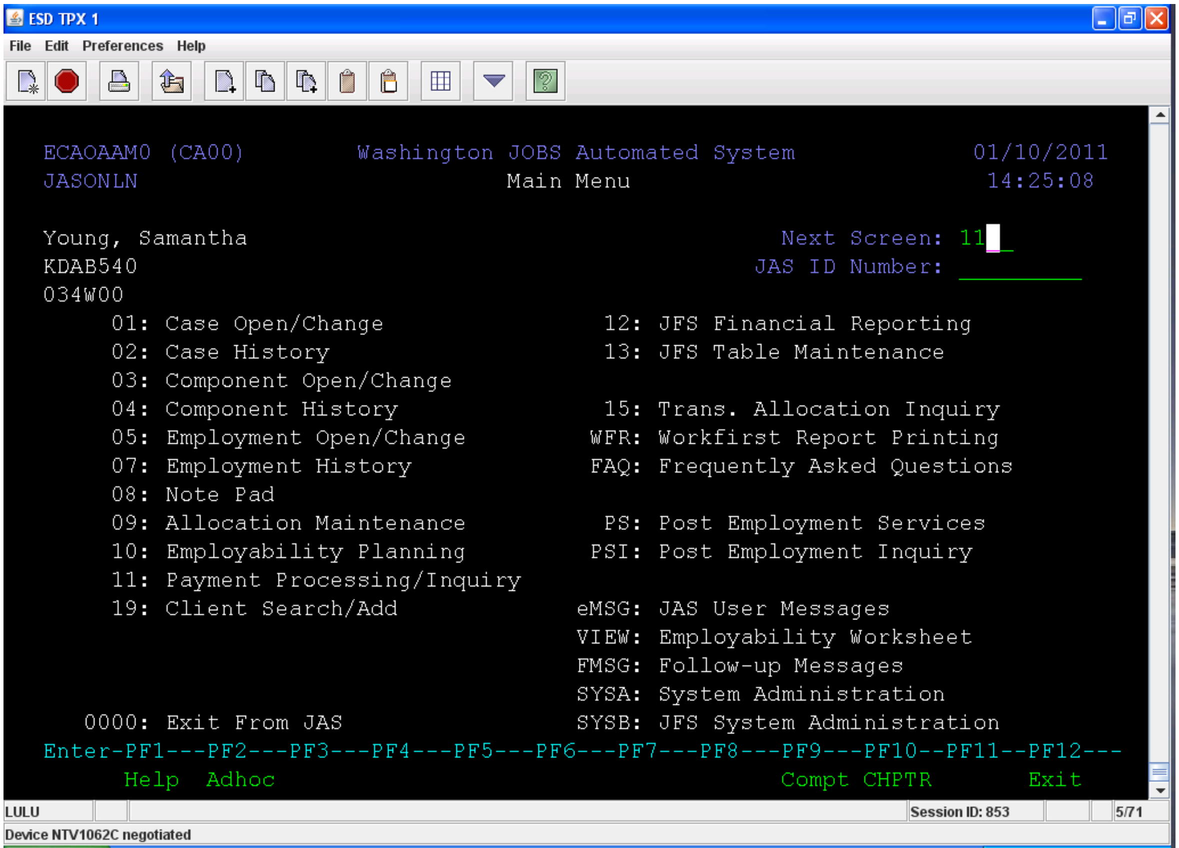
10 Screen – Employment Planning screen to create a voucher



Employability Planning screen to create a voucher

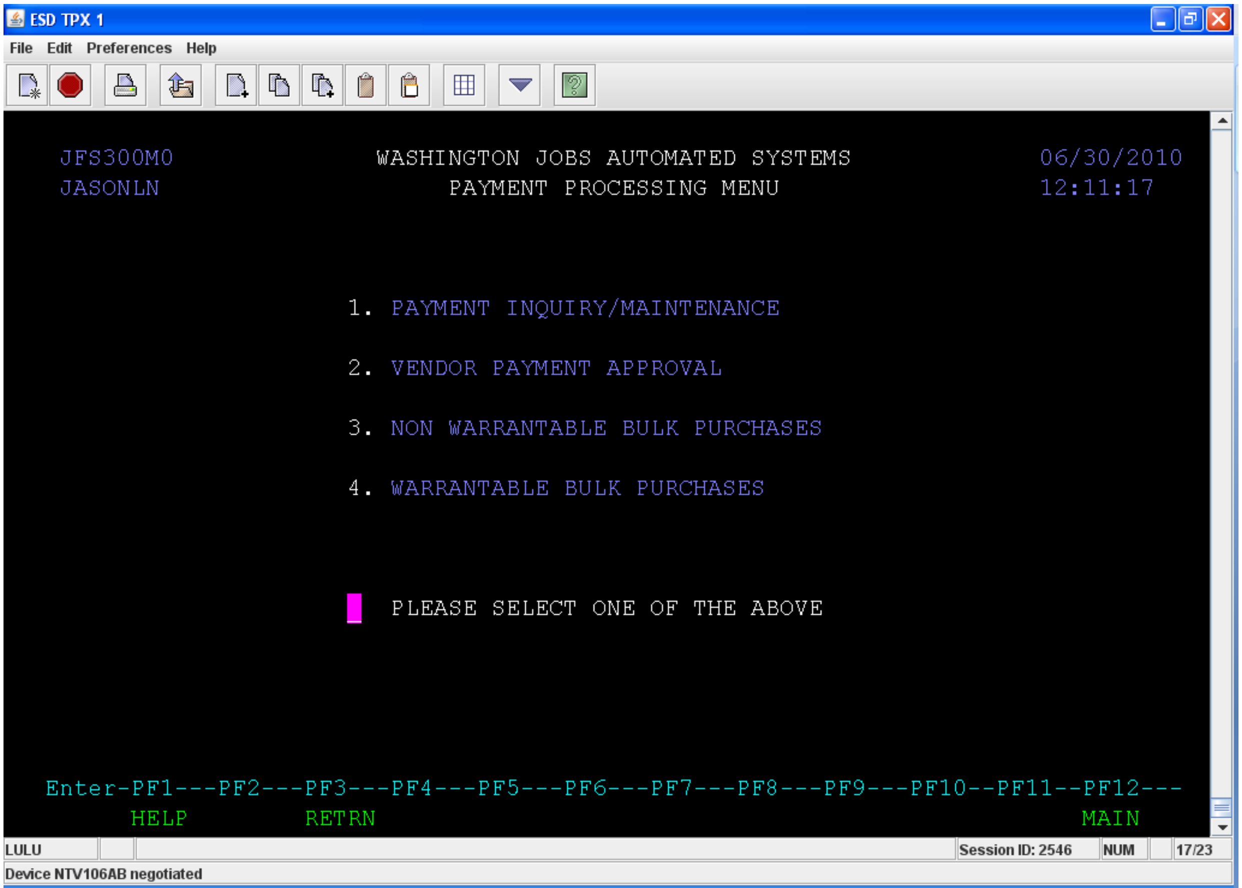
1. In the Selection field type in
    - U – Update Individual Responsibility Plan (Create a voucher)
    - T- Transfer Individual Responsibility Plan (Update file)
2. Press Enter Key

From the Main Menu



In the Next Screen field type 11 – Payment Processing/Inquiry
Press Enter

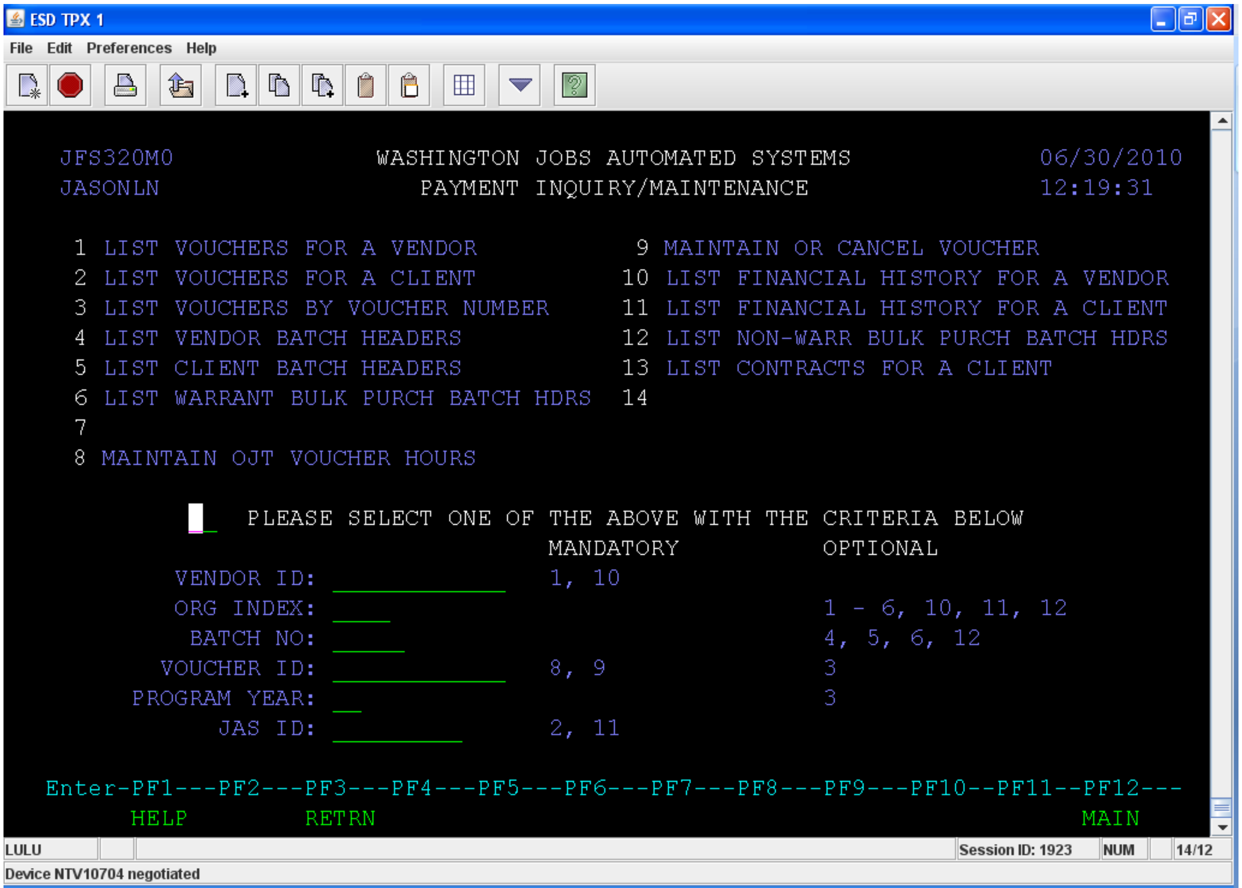
Payment Processing Menu



Enter one of the choices into the field and press enter.

1. Payment Inquiry/Maintenance Screen (correct, cancel, print a duplicate voucher)
2. Vendor Payment Approval (pay vouchers)

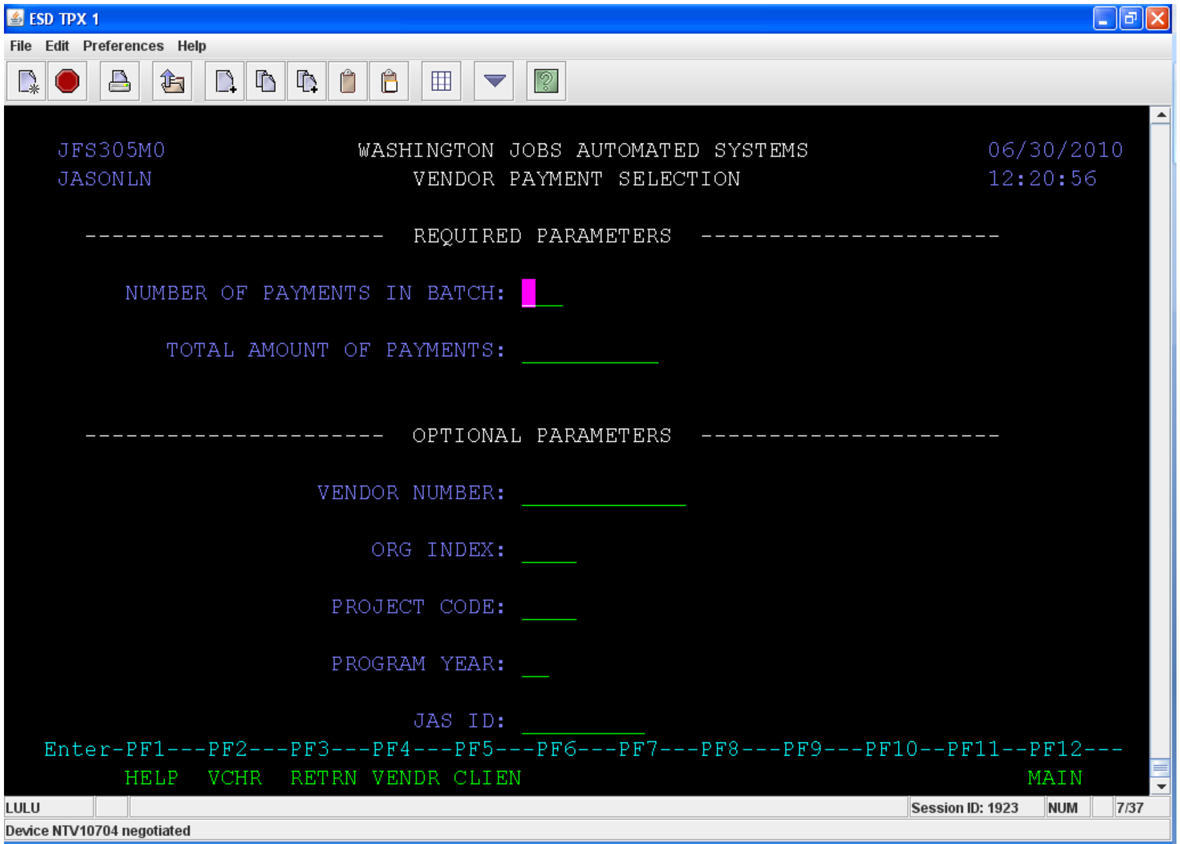
Payment Inquiry Maintenance – Change, Cancel update a voucher



In the **Please select one of the above with the criteria below** using the following choices

- 9 – Maintain or cancel voucher. Enter the voucher number and enter it into the Voucher ID field and press enter.
- 2 – List voucher for a client - Enter the participant JAS ID number and press enter.

Vendor Payment Selection Menu

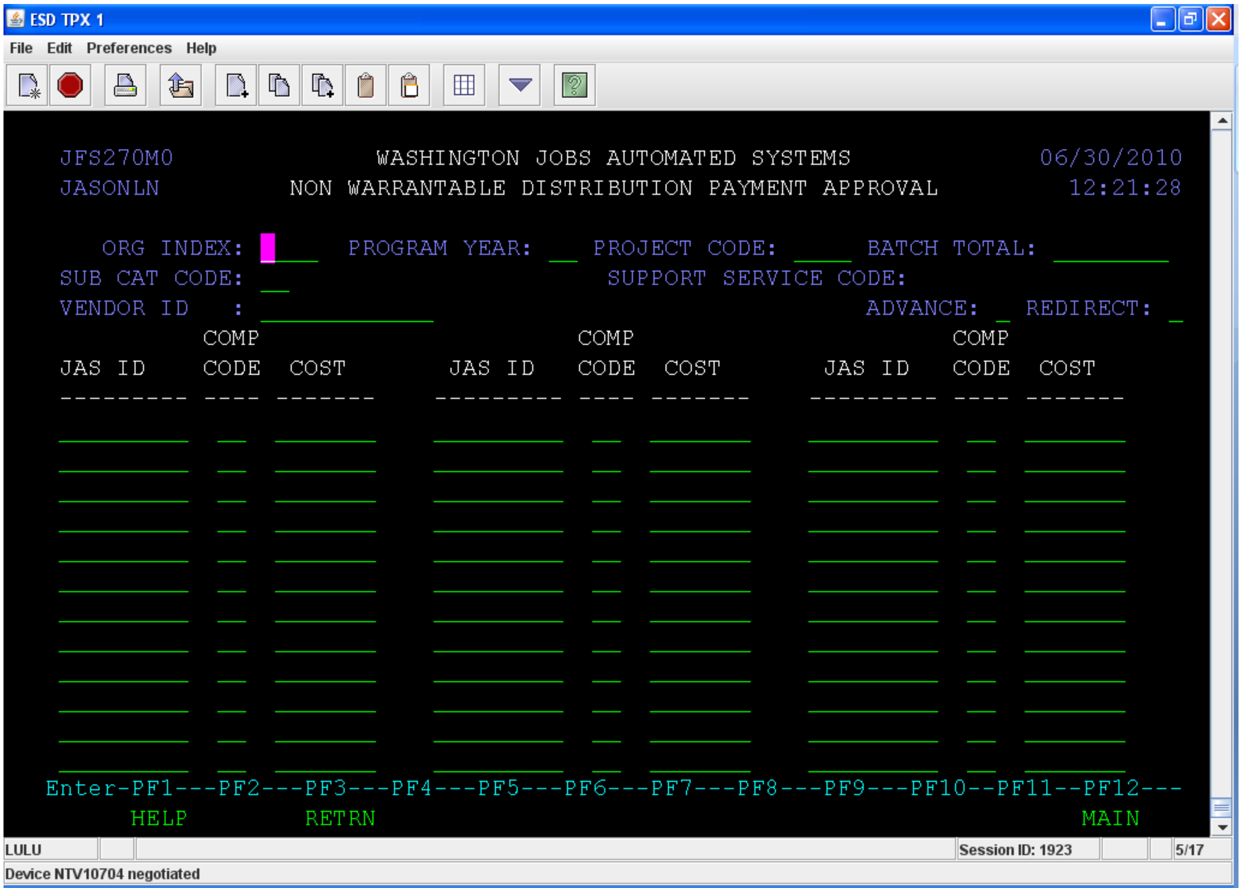


Enter the total number of payment in a batch

Total amount of payments (Dollar amount)

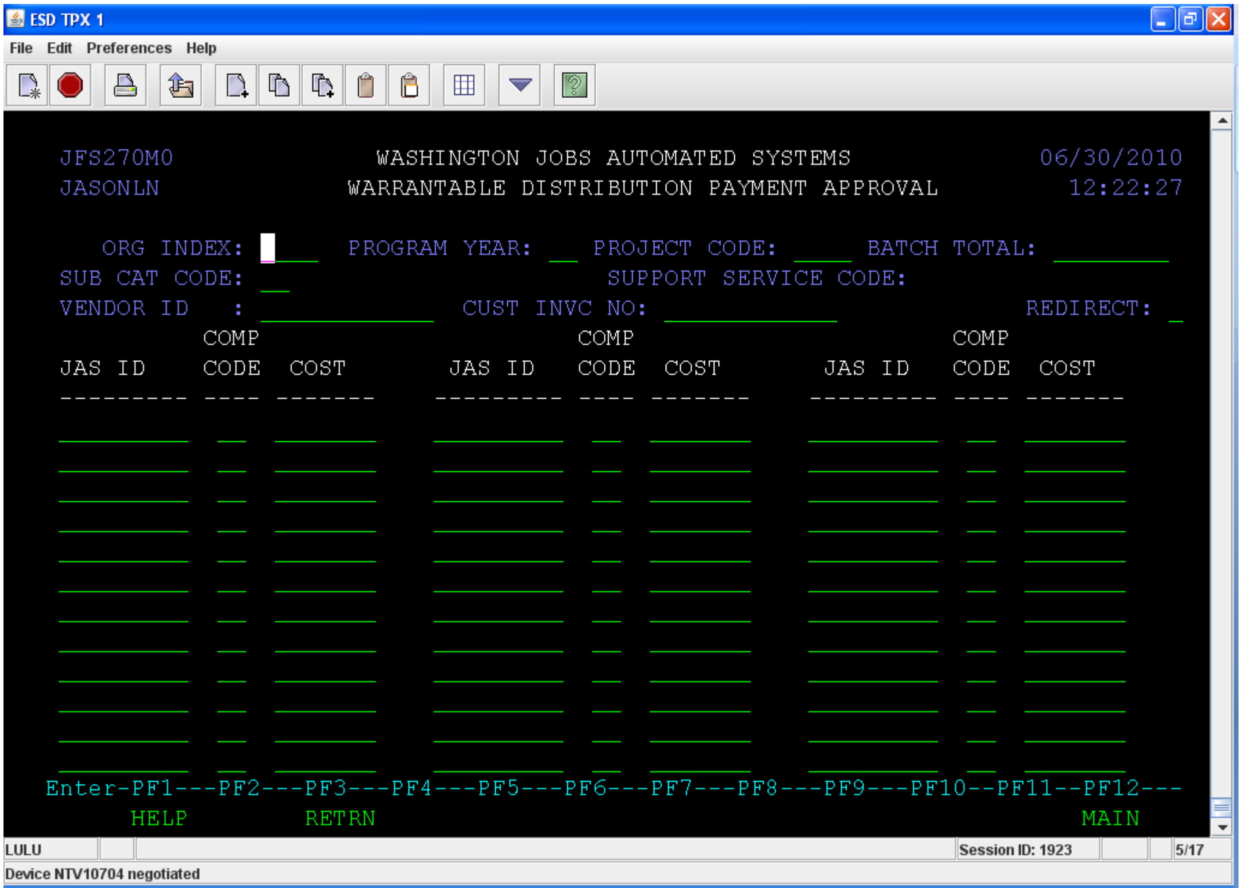
Press enter

Non Warrantable Distribution Payment Approval



Used to record items previously bought in bulk using an A-19, such as bus passes, bus tickets, ferry passes, or classes for a group of WorkFirst participants

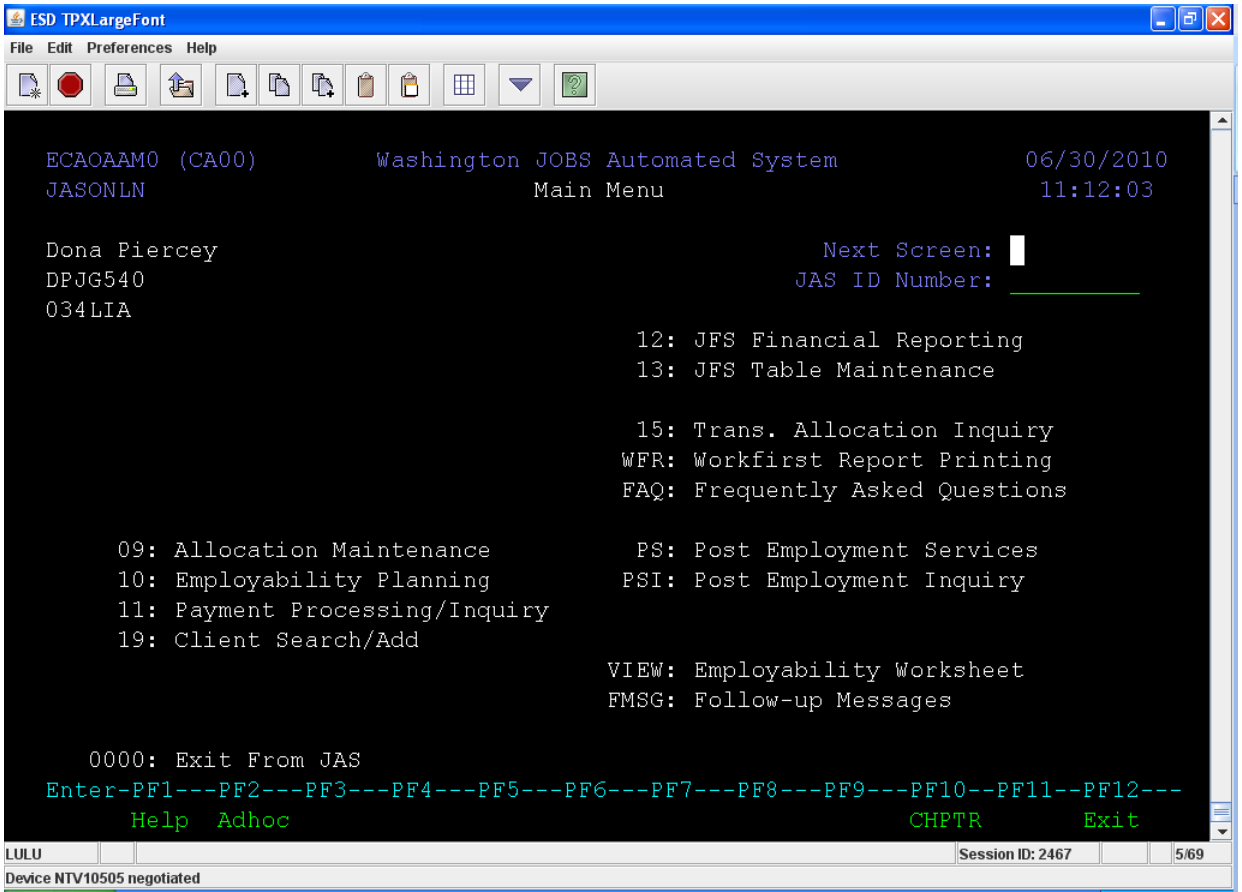
Warrantable Distribution Payment Approval



Use warrantable batches to record items NOT previously bought in bulk using an A-19, such as bus passes or classes for a group of WorkFirst participants.

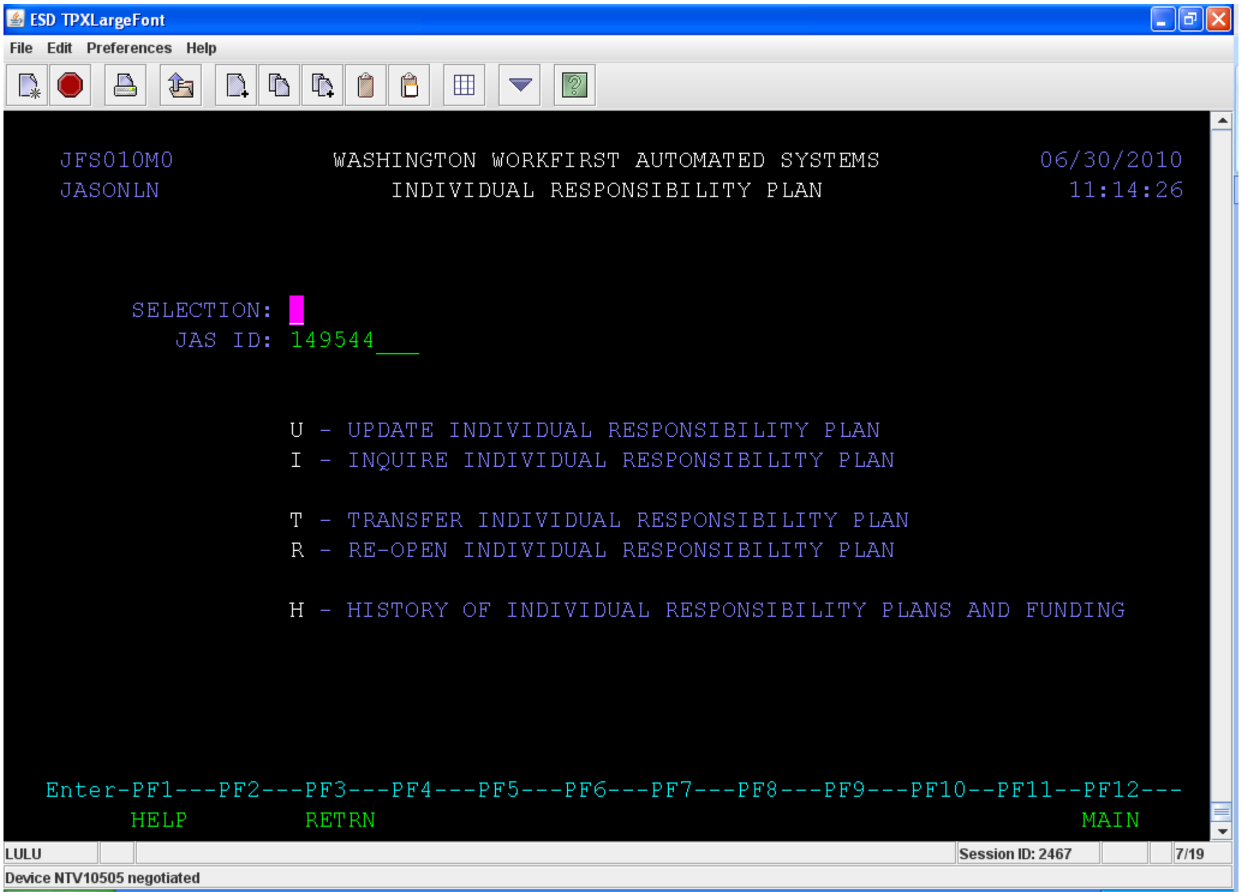
JAS – How to Create a Voucher

Main Menu screen



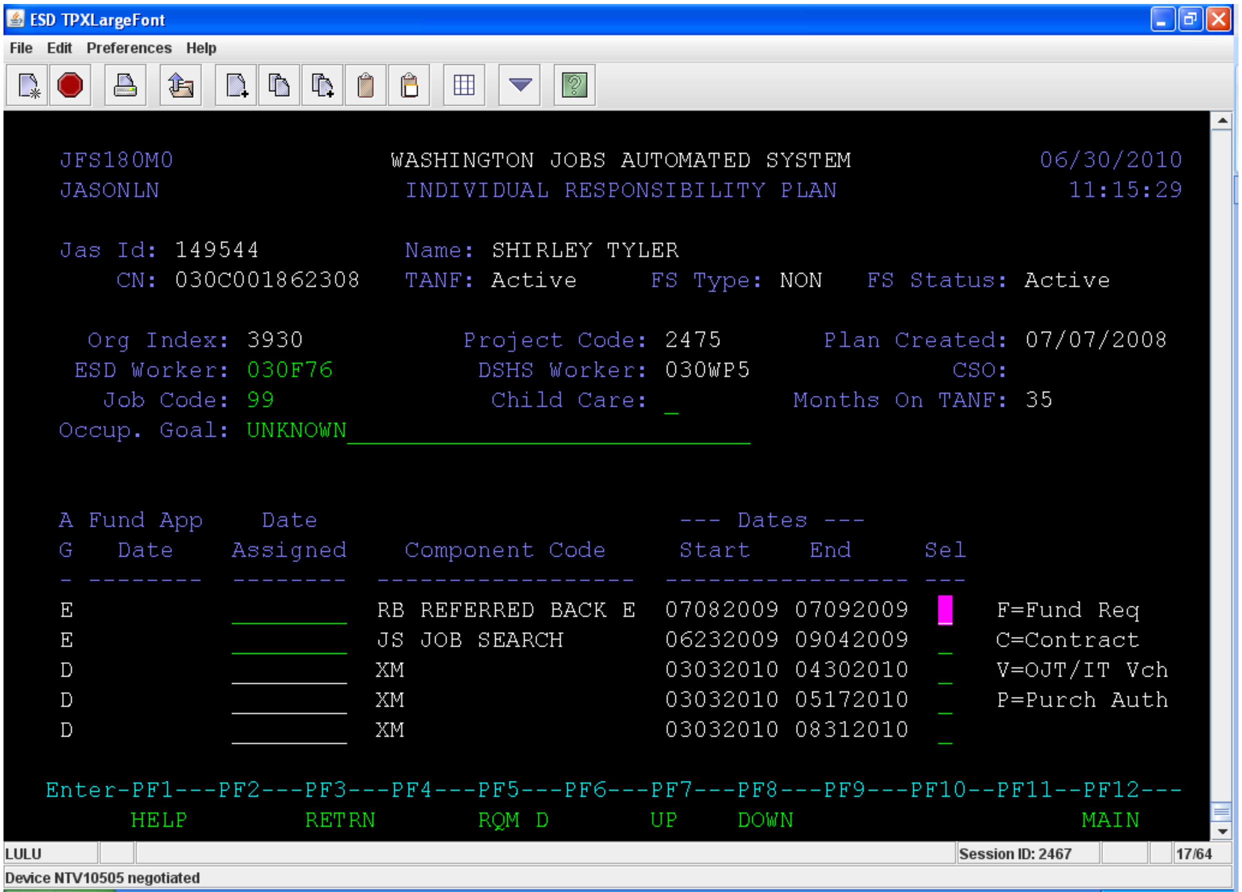
In the Next Screen field, type in 10 (Employability Plan) and press the tab key to bring the curser to the JAS ID number field. Enter the JAS # for the participant and press the Enter key

Individual Responsibility Plan Screen



In the Selection field, type U (Update Individual Responsibility Plan) and press the enter key. The JAS number will carry over from the main menu screen.

Second Individual Responsibility Plan Screen

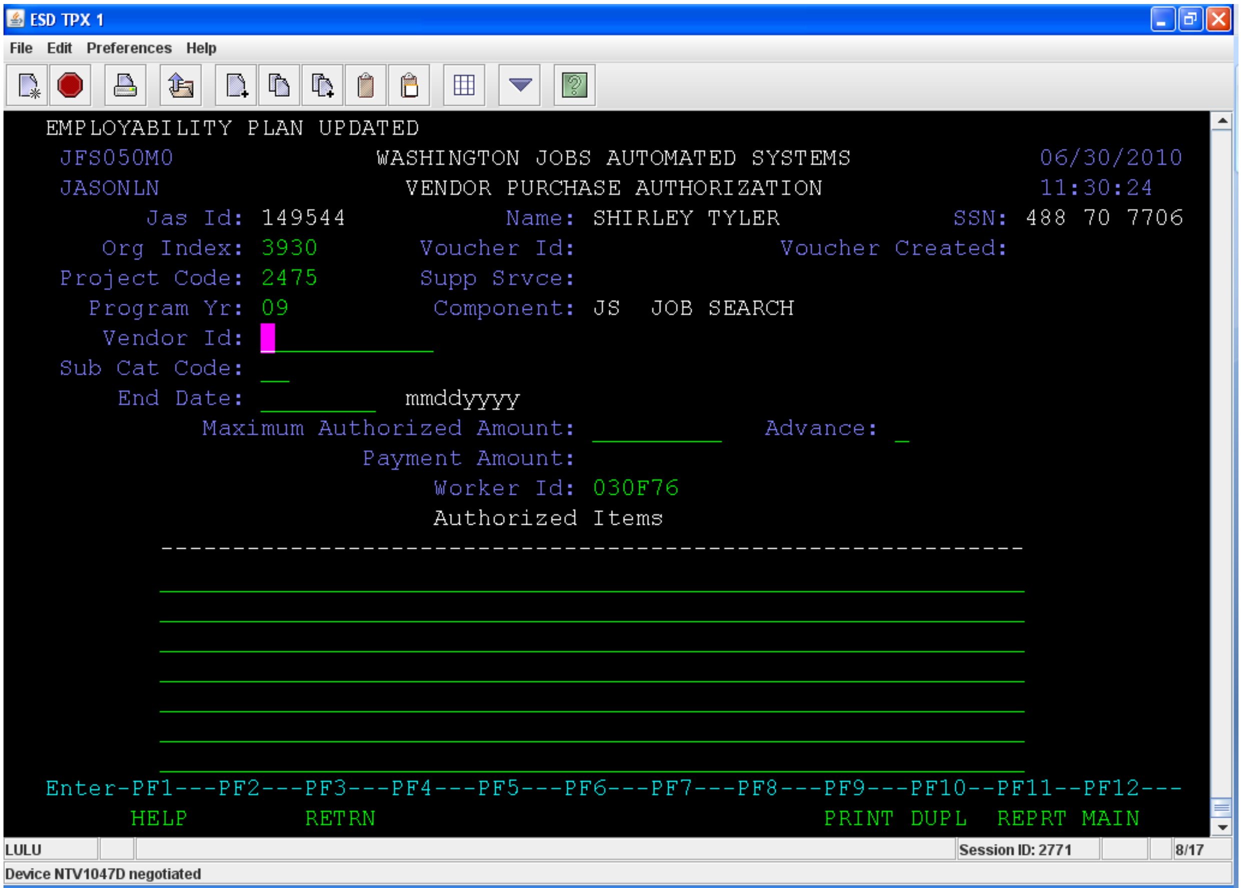


Enter “P” in the Sel field after the component to issue the voucher under (JS, PT, FT or SS only) and press enter.

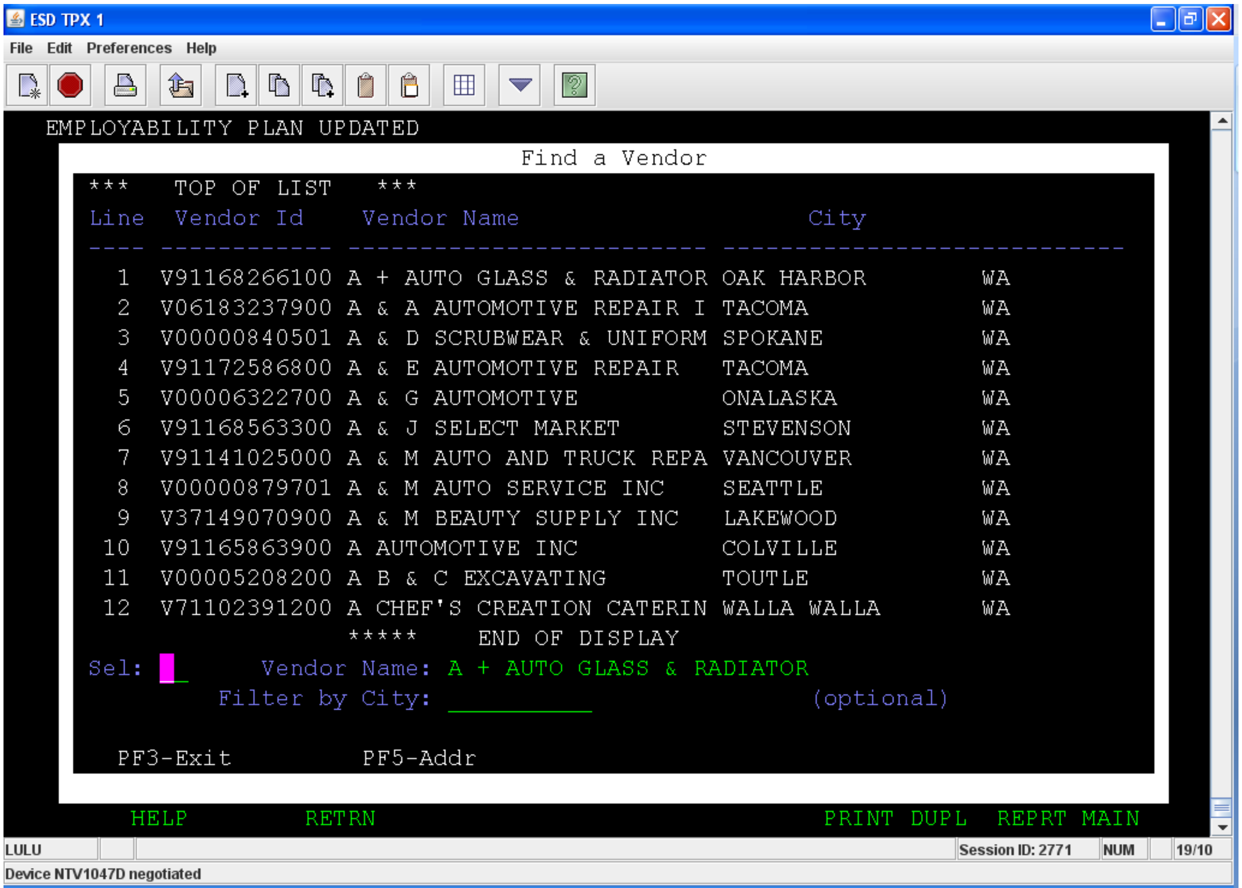
Fields on this screen to double check are:

Org Index: (make sure it is your office)
Project Code: 2475 (WorkFirst) or 2345 (OJT Employer Reimbursement)
ESD Worker: field will have a number assigned, it not go into eJAS and add the ESD Worker ID

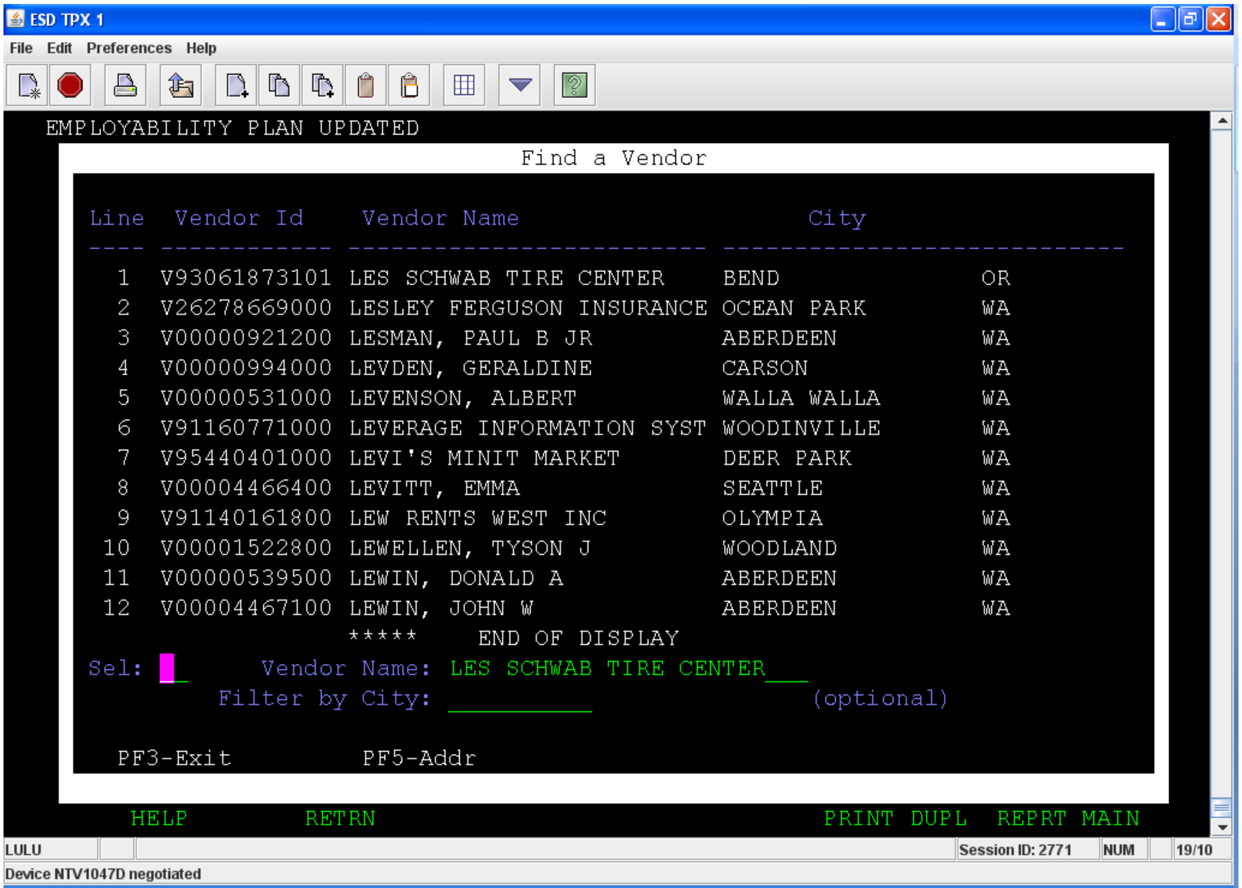
Vendor Purchase Authorization Screen



In the Vendor ID field, enter ID number. If you don't have the ID number, you can search by pressing the F1 key and the screen below will appear.

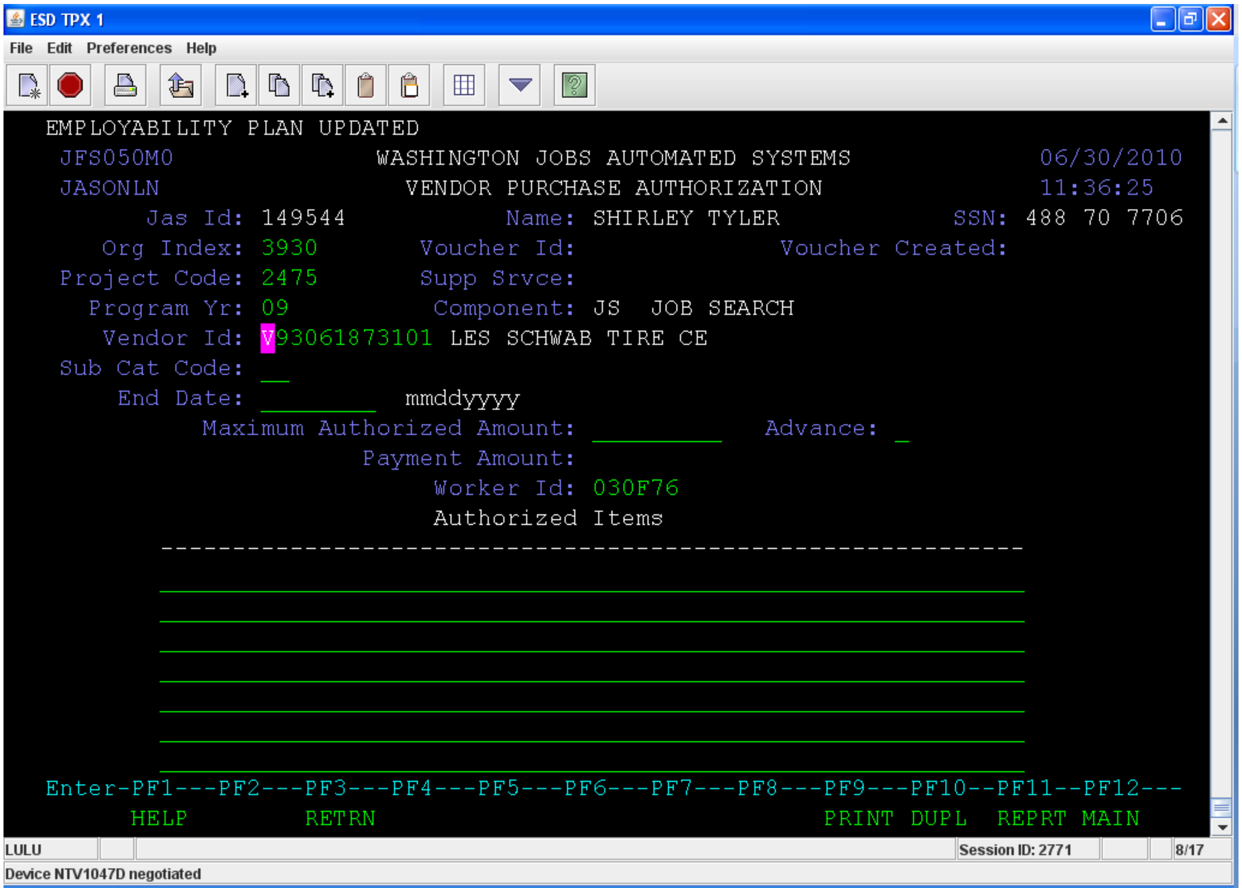


Press the Tab key and type in the vendor name and press enter.



When you find the vendor you need, enter the Line number in the Sel: field and press enter.

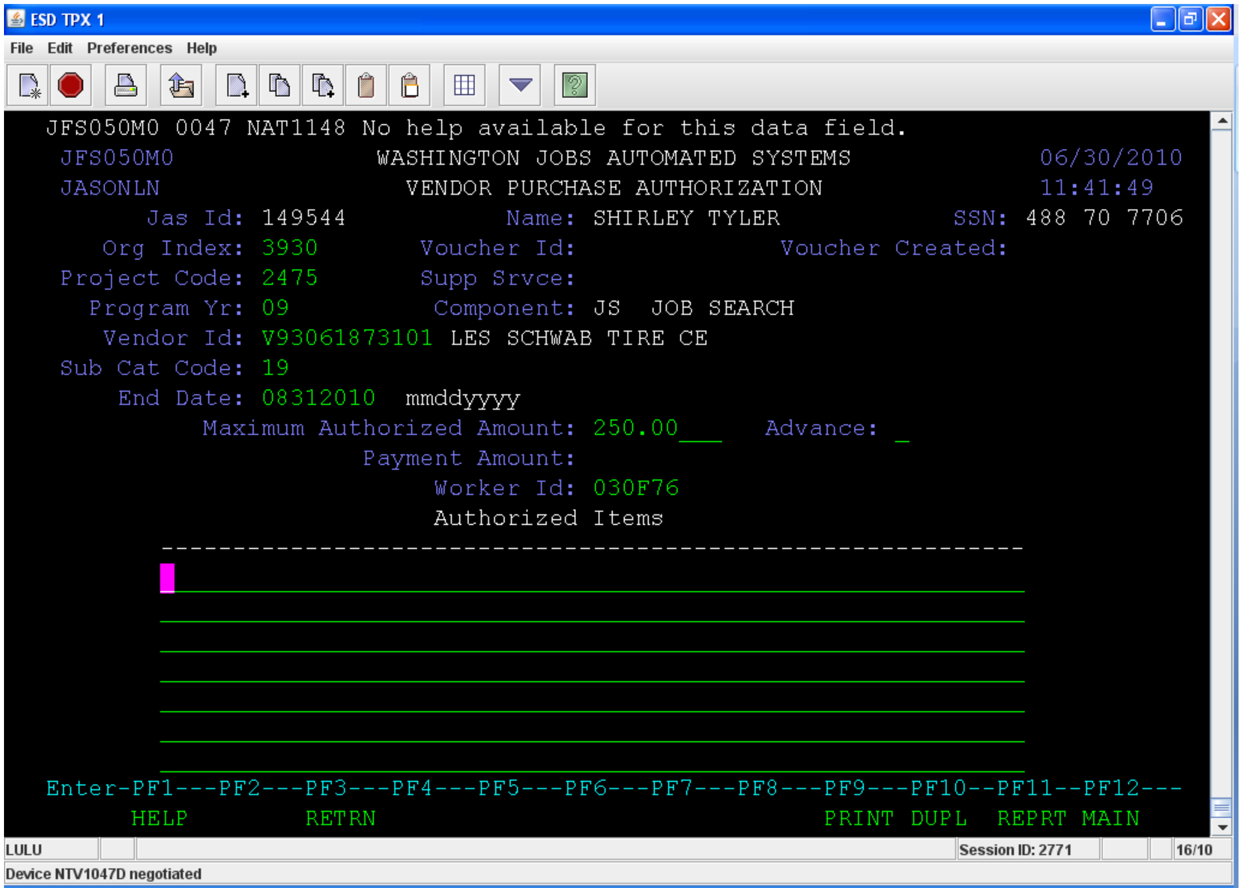
The Vendor number will be added to the Vendor ID on the voucher screen.



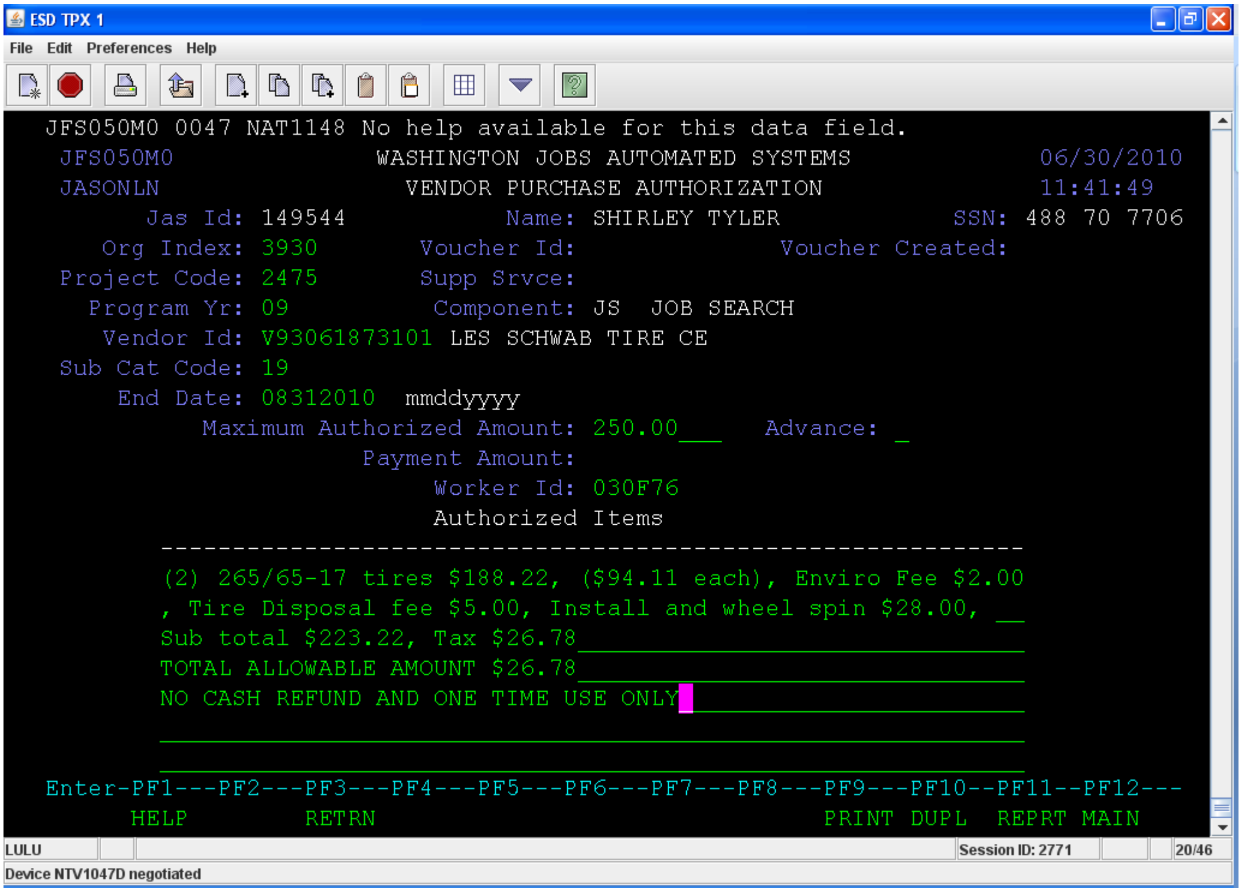
Press Tab button to the Sub Cat Code field. If you don’t know the Code to use, press F1 key and a window will appear for the code descriptions or refer to the Support Service Directory. Enter the Sub Cat Code and press enter.

Tab to the end date. Enter the end date (mmddyyyy) you want the voucher to end (no more than 30 days out from the date of being issued). Press Tab key.

Enter the amount from the receipt. Press the Tab key to move your curser to the lined field.



Type in the description of goods or services

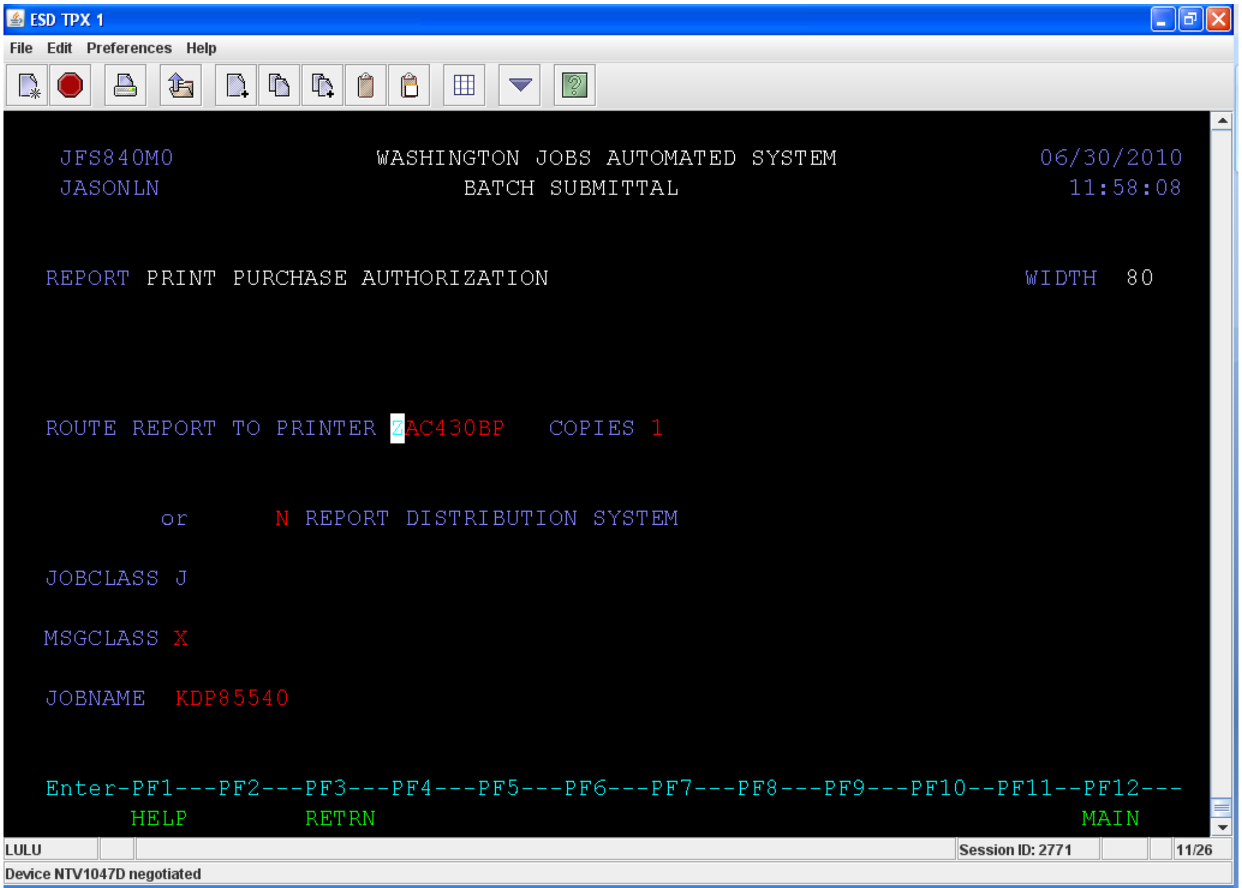


```
ESD TPX 1
File  Edit  Preferences  Help
  JFS050M0 0047 NAT1148 No help available for this data field.
   JFS050M0                WASHINGTON JOBS AUTOMATED SYSTEMS            06/30/2010
   JASONLN                   VENDOR PURCHASE AUTHORIZATION              11:41:49
         Jas Id: 149544             Name: SHIRLEY TYLER            SSN: 488 70 7706
      Org Index: 3930         Voucher Id:             Voucher Created:
   Project Code: 2475         Supp Srvce:
     Program Yr: 09            Component: JS  JOB SEARCH
      Vendor Id: V93061873101 LES SCHWAB TIRE CE
   Sub Cat Code: 19
       End Date: 08312010  mmddyyyy
             Maximum Authorized Amount: 250.00___   Advance: _
                        Payment Amount:
                             Worker Id: 030F76
                             Authorized Items
           ------------------------------------------------------------
           (2) 265/65-17 tires $188.22, ($94.11 each), Enviro Fee $2.00
           , Tire Disposal fee $5.00, Install and wheel spin $28.00, __
           Sub total $223.22, Tax $26.78_______________________________
           TOTAL ALLOWABLE AMOUNT $26.78_______________________________
           NO CASH REFUND AND ONE TIME USE ONLY________________________
           ____________________________________________________________
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        HELP        RETRN                               PRINT DUPL  REPRT MAIN
LULU                                                    Session ID: 2771   20/46
Device NTV1047D negotiated
```

Press the PF9 key to print.

Note: If you hit the PF9 key (Print) and it failed to print, the only way to print another copy is to press the PF10 key (Dupl).

Batch Submittal Screen



Tab to the Copies and type in the number of copies needed and press enter key.

Congratulations you just completed creating a voucher!

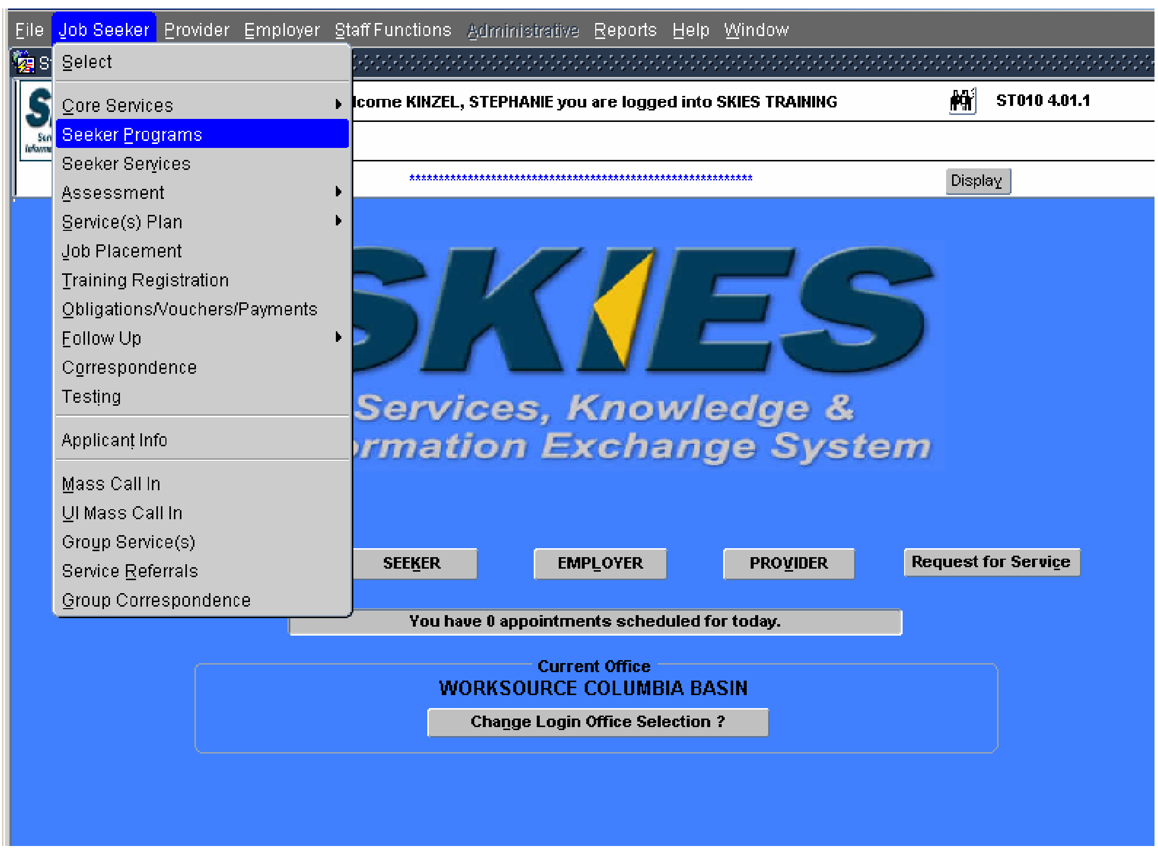
SKIES (Services Knowledge and Information Exchange System)

Document in SKIES

In order to provide a complete record of the participant's progress, you must document the following activities.

- When the participant enters Employment Services
- When you make a referral.
- When a participant meets with a coach to go over their Activity Planner.
- When you complete the full Initial Assessment.
- When you refer the participant to KeyTrain activities.
- When you enter or review and update employment History and Desired Employment.
- When the participant enters full time unsubsidized employment and will no longer be receiving employment services.
- When you provide any services.

To enroll a participant in Employment Services, click on Seeker Programs.
In Program Name field, click the arrow and select WorkFirst Job Search.
Next select Program Status by clicking the arrow. Select Participant and click Save.



Address updating – After updating a mailing address or phone number in SKIES add a note that the address or phone was updated.

Notes – Use the notes section to document WorkFirst job searching activities. You can also research SKIES notes for additional information or history of the participant's activity.

> Remember - When you meet with your participant to verbally read back the mailing address in SKIES to verify it is current. This is the only way to ensure you have the right information.

Find complete SKIES information and help on Inside SKIES.

ESD On-the-Job Training (OJT)

This is full-time, subsidized employment for participants receiving cash assistance. OJTs provide skills training on site with an employer and may be combined with formal classroom or skills training. On-The-Job Training (OJT) prepares a participant for unsubsidized employment and transition off cash assistance.

- OJT is only available to participants who goal is immediate employment.
- OJT contracts can be written up to 480 hours (12 weeks).
- The trainee is supervised during the term of the OJT by designated employee or a supervisor.
- Supplemental training tied to work is 50% reimbursed to the employer if the employers agree to release time and the trainee agrees to take, attend, and make satisfactory progress in the class.

> Remember - Full-time is defined as 32 - 40 hours a week.

The WorkFirst program includes two types of full-time OJTs:

1. Allows a participant to learn new skills in a new job.
2. Offers wage progression by increasing skills to move a participant into a new job with the participant's existing employer or with a new employer.

Employers eligible to participate in OJTs:

- Private companies or corporations
- Non-profit companies or corporations
- Public agencies (only if a participant cannot access their own records)

Guidelines (Use the WorkFirst Internal Controls Manual for step-by-step instructions.)

Training must be related to the participants short or long term goals outlined in their employment plan. The company must be financially stable and have the intent and capability to retain the OJT employee in long-term employment. The OJT employee must receive the same wages and benefits as those in comparable positions.

- Work with our local Business Services Unit when contacting employers or to find out about opportunities in your area.
- Look for employers that fit participant’s interests, needs, and circumstances.
- Match the participant’s assessment results to the local labor information.

- Sell the job seeker's skills and personal attributes to employers and talk about how these factors fit the employer's needs.

A good OJT candidate has:

- A good participation history.
- An interest in the occupation.
- Basic skills necessary to begin the work.
- No barriers to employment that may interfere with successful completion of an OJT (for example, transportation, childcare, health issues).
- A positive attitude towards obtaining regular full time employment.

Benefits to Employers:

- Financial reimbursement of up to 50% of the OJT employee's wages.
- ESD WorkFirst employees will visit the participant and employer to identify and address any problems that may arise.
- Employers may be eligible for other incentives such as WOTC and Bonding Programs.

Wage Progression OJT's:

- Are for a participant who is employed in unsubsidized employment but has not exited TANF.
- Are with the participant's current employer
- The training should outline the occupational skills the participant will acquire
- The training is an upgrade to the participant's existing skills.
- Once the participant successfully completes the OJT, they will increase their average earnings.

Release Time Training:

- Classroom skills training provided by someone other than the employer.
- No more than 25% of the total training time may be Release Time Training.
- An employer is reimbursed 50% for any hours the participant is not at work but at "Release Time Training."

What is the employer reimbursed for?

- No more than 50% of the wages paid for work during the training period. Holidays, overtime or vacation time is not included.

The employer must be an official business with a UBC number or a business license in order for WorkFirst to enter into a contract with them.

Before the participant starts work:

Have the employer read and sign the:

- WorkFirst On-the-Job Training Master Agreement
- WorkFirst On-the-Job Training Terms and Conditions.

These are agreements between a local office and a specific employer to conduct training.

Involve the employer in the OJT development by explaining the purpose of the OJT and the employer's training responsibilities.

Ensure the employer will provide sufficient supervision for the participant to learn the contracted skills.

Inquire about the number of subsidized workers and unsubsidized workers the employer currently has. An employer may not receive subsidies for more than 25% or 1 in 4 of their workforce. (Consider all programs that may subsidize workers, such as WIA, Veteran programs, or Commerce's Community Jobs program.) To contract with a company above the 25% level requires an approved Exception to Rule (ETR).

After the participant starts work:

Consult with both the employer and participant about progress. Support all employer reimbursements with copies of time and payroll records.

Get copies of the timesheets signed by both the employer and the participant. Attach copies of the time sheets and payroll records to the voucher for employer reimbursement.

If the OJT employer fails to pay the employee wages or the employee's paycheck fails to clear the bank due to insufficient funds, do not use WorkFirst funds to compensate the participant for the loss. Refer wage issues to the Labor and Industries Wage Board.

Monitoring progress

Visit the worksite to ensure all OJT training objectives are met and all parties remain satisfied with progress.

Make these visits during the 1st, 3rd, 7th, and 11th week (according to the length of the OJT.) Visits may be more often if the employer and the ESD employment counselor agree.

Within three working days after each visit, record an “Employment” type note in eJAS documenting following:

- Progress toward meeting the OJT goals as stated by both the employer and the participant.
- Any concerns along with solutions raised by the employer or employee.
- Reasons for ending the OJT early.

For more information, read the On-the-Job Training Standards and follow the procedures in the Internal Controls Manual.

Industrial Insurance Coverage

State and federal law also requires a participant in an OJT be covered by industrial insurance. This coverage is sometimes referred to as L&I.

Employment Security Department (ESD) will pay Labor & Industries coverage for all ESD OJT. If you initiate an OJT Master Agreement, you must send a copy of the agreement to the WorkFirst Administrative Unit (Employment Security Dept., ECDD-WF Admin Unit (staff directory), PO Box 9046, Olympia, WA. 98507-9046) to start the L&I coverage.

ESD Work Experience (WEX)

A Work Experience is an unpaid part-time training assignment linked with job search activities.

- An opportunity for participants to practice or expand their work skills in a supportive and flexible work environment
- Typically short-term (up to 6 weeks)
- Provides minimal supervision and should complement the participant's career goals.

See the WorkFirst Internal Controls Manual for step-by-step instructions.

Who needs an Employment Services Work Experience?

Participants with no significant barriers to employment and are otherwise appropriate for job search may benefit from a short-term work experience.

These participants have:

- Arrangements for child care and transportation
- Been unsuccessful in job search due to:
    - Insufficient current work history
    - Lack of one or two job skills in a new career field
    - Insufficient current job references
    - Being away from the labor market for an extended period.

What are ESD Work Experience Timeframes?

The WEX lasts up to six (6) weeks. If you set up a WEX you must review it prior to the end of the 5th week. The review will determine how much more time is needed (up to an additional 6 weeks) for the participant to practice or expand his or her work skills to be competitive in the local labor market.

What are ESD Work Experience Work Site Standards?

When you set up a WEX, work with your local WorkSource business team. Follow these guidelines.

- ESD Work Experience sites may only be developed with a:
    - Nonprofit organization,
    - Community or technical college, or
    - Federal, state, local, or tribal government or district, for example school district.

- During the development process, you should coordinate with other service providers such as Community Jobs, WIA programs, and so on to effectively utilize local community resources and employers.

- The ESD Work Experience work site must meet the following standards, limitations and general conditions as outlined in the WorkFirst Work Experience Training Contract Terms and Conditions.
  - Must provide supervision and skills training for the participant.
  - Must submit to the ESD employment coach a Time Sheet and Progress Report signed by the work experience provider and the participant at the time of the site visit conducted every two weeks.
  - Must not give the participant security or other access to WorkFirst participant information, such as in ACES, eJAS, CATS, or SKIES.

Industrial Insurance Coverage

State and federal law also requires a participant in work experience be covered by industrial insurance. This coverage is sometimes referred to as L&I.

Employment Security Department (ESD) will pay Labor & Industries coverage for all ESD Work Experiences. If you initiate a WEX Master Agreement, you must send a copy of the agreement to the WorkFirst Administrative Unit Employment Security Dept., ECDD-WF Admin Unit (staff directory), PO Box 9046, Olympia, WA. 98507-9046 to start the L&I coverage.

Working with Participants with Conviction Histories

Treat participants with conviction histories as you would any other job seeker. Help them assess their skills and abilities, learn job finding skills, and then match them to employers who are looking for someone with those skills and abilities.

In addition to the basic job finding assistance, there are certain things to keep in mind when working with these participants.

New Directions is ESD's re-entry guide for customers with conviction histories. Use it as a tool for information for yourself or the participant, hand it out as a do-it-yourself tool, or use it in workshops.

Inside ESD has offender resources and provides information on such things as the Work Opportunity Tax Credit (WOTC), Washington State Bonding Program, background checks, and much more.

Tips and Tools

Checklist: This maybe a helpful tool as you get started (local offices may have their own checklist). T:\WorkFirst Desk Manual\NEWPARTICIPANTJSENROLLMENTchecklist012012.doc

Internal Controls Manual
http://www.wa.gov/esd/workfirst/InternalControlsManual.pdf

WorkFirst Standards
http://www.wa.gov/esd/workfirst/docs/ProgramStandards/WF_ProgramStandards.pdf

WorkFirst Handbook
http://www.dshs.wa.gov/ESA/wfhand/

ESD acronyms
http://insideesd/content/commissionersoffice/cmu/acronyms-list.aspx

WorkFirst acronyms
T:\WorkFirst Desk Manual\A - Acronyms (2).docx

How to change your printer
T:\WorkFirst Desk Manual\Changing printerjfs.docx

Locating a statewide vendor
T:\WorkFirst Desk Manual\Locating a Statewide Vendor.012012docx.docx

Access to JFS/CATS/eJAS
T:\WorkFirst Desk Manual\stepbystepprocessforaccess.pdf

How to order copies or publications from the Copy Center
content - publications-gateway