WorkFirst
Career *Scope*
Training & Desk Manual

October 2014

Workforce & Career Development Division

Employment Security Department
WASHINGTON STATE

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Purpose: How-to Manual

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 required record keeping.

In order to keep the information up-to-date, this manual contains links to websites, resources, and other documents that you will find useful. You may want to bookmark on your web browser it for easy access.

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

Resource Documents

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

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

Websites you will want to become familiar with:

- Washington WorkFirst – statewide WorkFirst information from DSHS
- Inside WorkFirst – website for ESD's Career Scope program and resources
- Go2worksource
- Employment and economic information

The Workforce & Career Development Division (WCDD) WorkFirst program coordinator provides training on other subjects related to your WorkFirst duties.

Program Overview

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 website.

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, including 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 was chaired by the director of the Office of Financial Management. Today, DSHS is the head of the state’s WorkFirst Program and works with the partnership to provide services.

DSHS and the WF partners work closely with the Legislative Task Force, which was mandated by legislation to ensure all aspect of the WorkFirst Program support the needs of the state’s TANF population.

Program Overview

ESD's WorkFirst Career Scope at-a-glance

Career *Scope* is a four-phased approach to helping participants on a pathway to self-sufficiency. In the past, WorkFirst focused on putting participants to work so that they could stop using Temporary Assistance for Needing Families (TANF) benefits. The program shifted toward an individualized, participant-centered (transformational) approach to helping people go to work. Career *Scope* ensures the participants are engaged earlier in their employment readiness process, with value-added activities that meet them where they are and increase their likelihood of employment. Additionally, Career *Scope* works to stay connected with families over time and provided much needed retention services and supports to help them move out of poverty and on a pathway towards self-sufficiency.

Phase I
- **Orientation & Assessment** (up to one week)
- career exploration & skills identification phase

Phase II
- **Asset Development** (up to two weeks)
- work search preparation phase

Phase III
- **Employment Pathways** (up to nine weeks)
- work search phase

Phase IV
- **Workers & Careers** (voluntary, up to one year)
- post-TANF employment and retention phase

Successful Communication

The WorkFirst website provides information on WorkFirst partners and their roles and responsibilities and answers to the following:

- Who are the 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
- Welcome
- Warmth
- Like/friendliness

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.

Engaging Participants in Transformational Relationships

The Employment Security Department (ESD) has moved from a transactional approach for job search to a transformational approach through Career *Scope*. 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. WCDD 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.

Successful Communication

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.

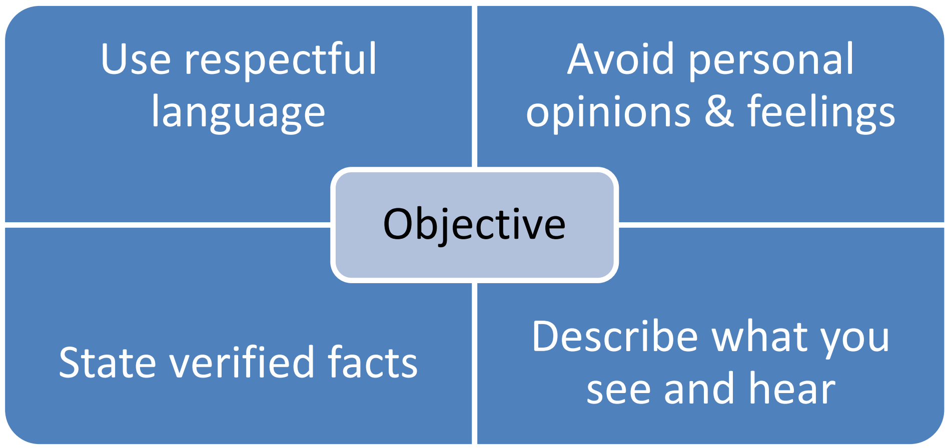
Three more reasons to document:

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 (i.e., 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)

Phase I: Orientation & Assessment

The first phase of Career Scope provides an opportunity for ESD to welcome WorkFirst participants to WorkSource and help them understand why work is important, what skills they can bring to the workplace, what kinds of jobs are available in the community, where they might fit in the local labor market and how to achieve their long-term goals for self-sufficiency. Coaches provide Phase I activities in both group and one-on-one sessions. These activities could last up to five days and consist of two parts.

Screen Participant for Work Readiness

The WorkFirst Handbook 4.1.3 states that before a participant can begin job search, they need to be ready to look for work. Career *Scope* coaches must determine if the participant meets the following "Work Ready Criteria" ,aid in ensuring participants are ready, willing and able to benefit from employment activities. Using these criteria should result in fewer Refer Backs (RB), time saved and more effective participant engagement.

Participants being referred to Career *Scope* services need to have:

- Child care in place, including a back-up child care plan.
- Reliable transportation, including back-up transportation.
- A current Comprehensive Evaluation (CE) in eJAS per the WorkFirst Handbook.
- Picture ID and Social Security information ***or*** be able to obtain within the first 4 weeks of entering Career *Scope*.

Participants being referred to Career *Scope* need to be –

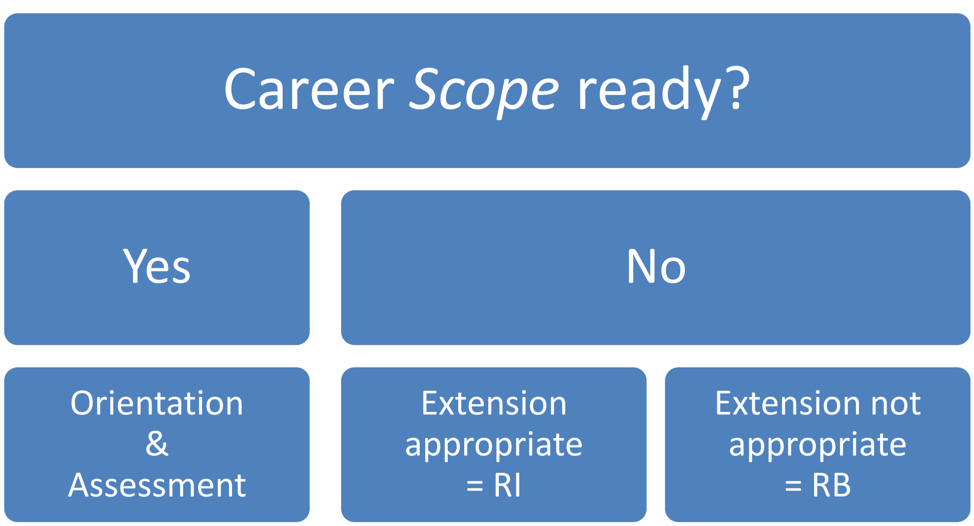
- Willing, able, and available to accept employment if offered – FT employment being the goal in helping move families toward self-sufficiency.
- Able to:
    - participate in Career *Scope* FT (33 - 38 hours per week) ***or***
    - 20 hours per week for single parents with a school aged child under the age of 6 or

- participate in Career *Scope* PT (a minimum of 10 hours per week) while completing the last 4 weeks of another work readiness activity (Commerce programs, training and/or education) ***or***
- participate in Career *Scope* PT (no less than 10 hours per week) while participating in barrier removal activities as outlined in their Individual Responsibility Plan (IRP).

Preferred, but not required –Have a high school diploma or high school equivalency certificate or be enrolled in a high school equivalency program and making satisfactory progress.

For more on when it is appropriate to refer Community Jobs participants to job search, please refer to WorkFirst Handbook Section 8.3.12: Stacking CJ with Part Time Job Search.

Participants who are employed and still on WorkFirst may be referred to Career *Scope* for services to find a full-time or better job regardless of the number of hours they can participate as long as they are meeting fulltime participation and can come into the WorkSource Center as agreed to with their WFPS and listed on their IRP. The ESD employment coach will determine the services the participant needs in order to be successful.



Orientation to Career *Scope*

The Career *Scope* 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:

- Career *Scope* expectations
- Scheduled reporting requirements
- Excused absence process
- Reporting temporary, full time or part time employment
- Dress code
- How to complete the Plan of Activities
- What support services are available
- How to contact the Career *Scope* coach
- Setting up an e-mail address to use for job searches
- Resources available at WorkSource and in the local community
- An introduction to Phase IV – Workers & Careers

Some offices begin the SKIES registration and the Employment Skills Assessment during the Career *Scope* Orientation. Other offices do this during the initial one-on-one meeting with the Employment Coach. Your office may present the orientation as a PowerPoint, 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 Career *Scope* 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. Ask "what is important to you?"
    c. Tell them what you can and can't do
    d. Provide information
    e. 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 - Plan of Activity
    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

Work Skills Assessment (WSA)

Complete the Assessment

You must do an Employment Skills Assessment (ESA) and SKIES Registration for each participant. It is the centerpiece that engages you and the participant in a conversation about their interests, their strengths, their challenges, and the direction they want to go in their job search.

Staff work with the participant and have them complete the 6 questions associated with the Work Skills Assessment. The completed ESA is used to complete the ESD Update section of the DSHS Comprehensive Evaluation. The ESA questions are:

1. Do you have an updated resume or completed job application?
2. What is your 1 year employment goal and 5 year employment goal? How can we help you achieve these goals?
3. What is your Work History? (Examples: What types of jobs have you done in the past and why did you leave each job?)
4. Is there anything that would stop you from starting work tomorrow? If YES, please explain your circumstances.
5. What do you have to offer an employer?
6. What would your past employer say about you? Would you be able to provide a good recommendation from an employer?

The Employment Skills Assessment and the SKIES Registration must at least address:

- Employment history
- Education
- Employment strengths
- Job skills

Some offices offer and/or administer assessments through the following assessment tools:

- CHOICES Planner
- WOIS
- Dependable Strengths
- Employment and economic information
- MySkills MyFuture
- MyNextMove
- KeyTrain

NOTE: The SKIES Registration and Employment Skills Assessment is required for **all participants** in Job Search

KeyTrain is available in all offices. It is both an assessment and a training tool.

Participants should be introduced to KeyTrain and explained the benefits of utilizing it while in Job Search.

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, either 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

Comprehensive Evaluation (CE)

Completing the ESD Partner Update in eJAS

The ESD Partner Updates (pictured below) will be completed or updated each time a participant is referred to Career *Scope*. The update is comprised of the following 3 sections.

1. **Employment Skills Assessment Summary**. Staff will enter the Employment Skills Assessment (ESA) they complete with the participant. The ESA information will no longer be entered in eJAS notes. Future updates may be completed in this section as appropriate.
2. **Asset Inventory**. Dates Completed for the Asset Inventory section will prefill from the dates entered in CATS on the Asset Inventory screen. It is imperative the Asset Inventory screen in CATS reflect the most current dates completed. Any date changes in CATS will be reflected in the CE Asset Inventory Section of the CE. If no date is entered in CATS the applicable date will remain blank in the Asset Inventory Section of the CE.
3. **Update Notes**. This section may be used at any time to provide updated information regarding the participant's Employment Skills Assessment or other information pertinent to their success in Job Search.

Save Pend – Save Finish Functions.

- Save Pend may be used if the entry being made is not complete and you wish to return later to complete it.
- Save Finish is used to save the entry. Once Save Finish is selected changes may no longer be made to the entry.

Once an update is “Saved Finish” no changes can be made to this update. Another entry must be made to update or correct previous entries.

Labor Market Information

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 have a business outreach worker in your office, get to know them. They are a great resource.

WorkSource has many useful resources. For example, use Employment and economic information, MySkills MyFuture, MyNextMove to:

- Match assessment results with occupations
- Find occupations in demand or decline
- Research local labor market areas by county
- Learn about occupational skills and necessary training
- Research occupational outlook by regions across the state
- Match occupations to job openings

The ultimate goal for using labor market information is to help you understand what is currently happening in business and industry. Use this understanding to help direct the participant to the best possible career outcome.

Knowing your local labor market information should answer the following questions:

- What are the jobs of the future?
- What are the wages paid for these specific jobs?
- What are the skills required for the various types of employment?
- Which industries or occupations are growing and changing?

-
- What are the most competitive industry sectors today?
- What are the knowledge and skill requirements of critical in-demand occupations?
- What is the biggest skill gap in my area?

Continuous Activity Planning (CAP)

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 continuation in Job Search or next activity. You can conduct the CAP via phone or in person. You must document it in eJAS using "Continuous Activity Planning" note type.

Use the CAP in two situations:

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

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.

See Chapter 3.6.1 of the WorkFirst Handbook for more information on the use of the CAP.

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. Choose one of the **5** reasons below	3. Choose one of the **8** reasons below

Refer Back from an RI:

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

Refer Back from JS:

Select	Refer Back Reason
○	**Loss of Contact**
○	**Parent Refuses to Participate**
○	**Parent Unable to Participate (i.e. medical/legal)**
○	**Parent Has No Child Care**
○	**Parent 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. (Not on the same screen.)

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 "Noncompliance/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 Case Manager.

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

Phase II: Asset Development

Job preparation is the beginning of employment services and can last up to two weeks (longer if necessary). 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).

Phase II: Asset Development

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 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

Job Search (including Job Preparation) 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 3 weeks)**	**Job Search** **(can be extended)**
Orientation Employment Skills Assessment Skills Enhancement Training Employment Assets **Attending the Job Hunter Workshop classes (resume and cover letters, applications, interviewing, and researching labor market)**	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 Job Clubs

At a minimum the participant must physically come into the office and sign into CATS or be signed into CATS at least once 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 Plan of Activities
- Record the progress and/or areas to improve in eJAS notes
- Develop a new Plan of Activities
- Use the Plan of Activities to verify completed activities and determine actual hours of participation

Develop a Plan of Activities (POA) with the Participant

The Career Coach's responsibilities

- Meet with the participant at least every 7, 14 or 28 days as determined by their coach.
- 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 copy of their Plan of Activities outline their requirements for the period of the POA in eJAS notes.
- Update SKIES, as appropriate.

Participant's Responsibilities

- Complete the activities as planned.
- Fill out their Plan of Activities with detailed information about what they did to look for work or to prepare to look for work.

See Appendix A for the Plan of Activities form, and Appendix B for detailed instructions on completing the POA.

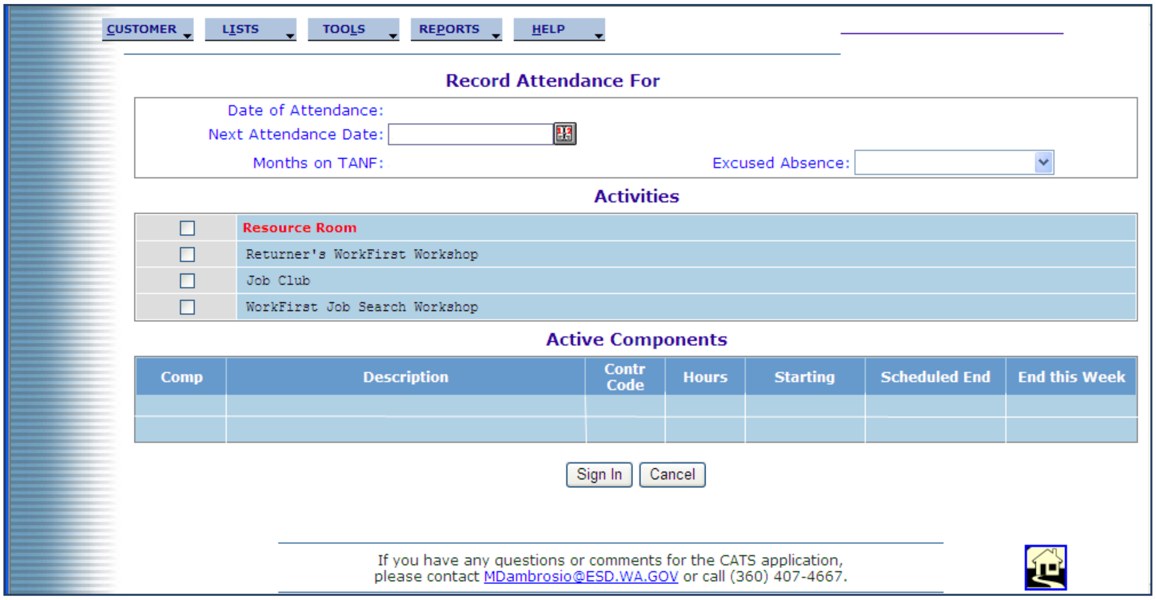
Setting Attendance Requirements in CATS

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

- Set the days the participants must sign or be signed into CATS by checking the appropriate days the participant is required to sign in if not every day. If no days are checked the participant must sign in each day.

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

Phase II: Asset Development



Asset Portfolio

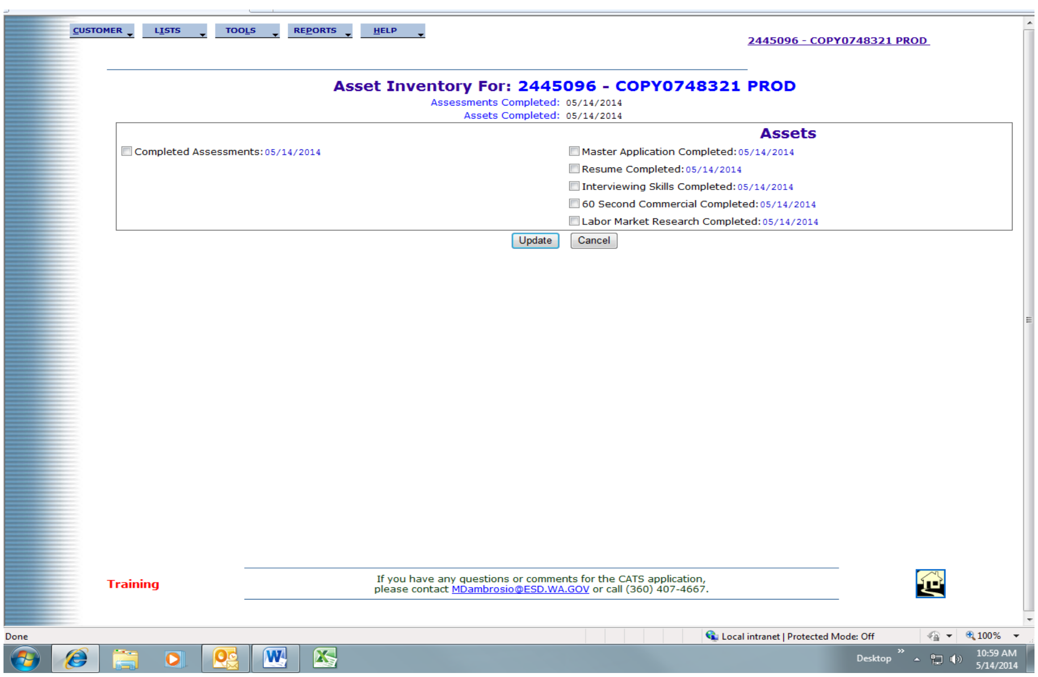
For a participant to apply and interview for a job, they must have a portfolio of completed assets to include at least the following:

- Master Application
- Resume
- The 60 Second Commercial
- Interviewing Skills
- 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 participants who have already attended a workshop or demonstrate the same level of skills/ abilities: record "Individualized Job Seeker If the participant completed the Job Hunter Modules to complete assets, you would record them as listed.

- For Resume, use Job Hunter Module 6.
- 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, you must re-evaluate all assets.

Plan of Activities Log

Use the Plan of Activities to monitor a participant's daily job search activities. When you collect a completed plan, make sure you give the participant a new Plan of Activities.

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

- **Participant's information:** Name, JAS ID #, required daily activity or 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 is listed

Use your scheduled meeting to discuss any unverifiable contacts or activities on the plan, or unaccountable time.

Verifying Plan of Activities Logs

During a scheduled one-on-one meeting with the participant, review the previous completed Plan of Activities 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).

Phase II: Asset Development

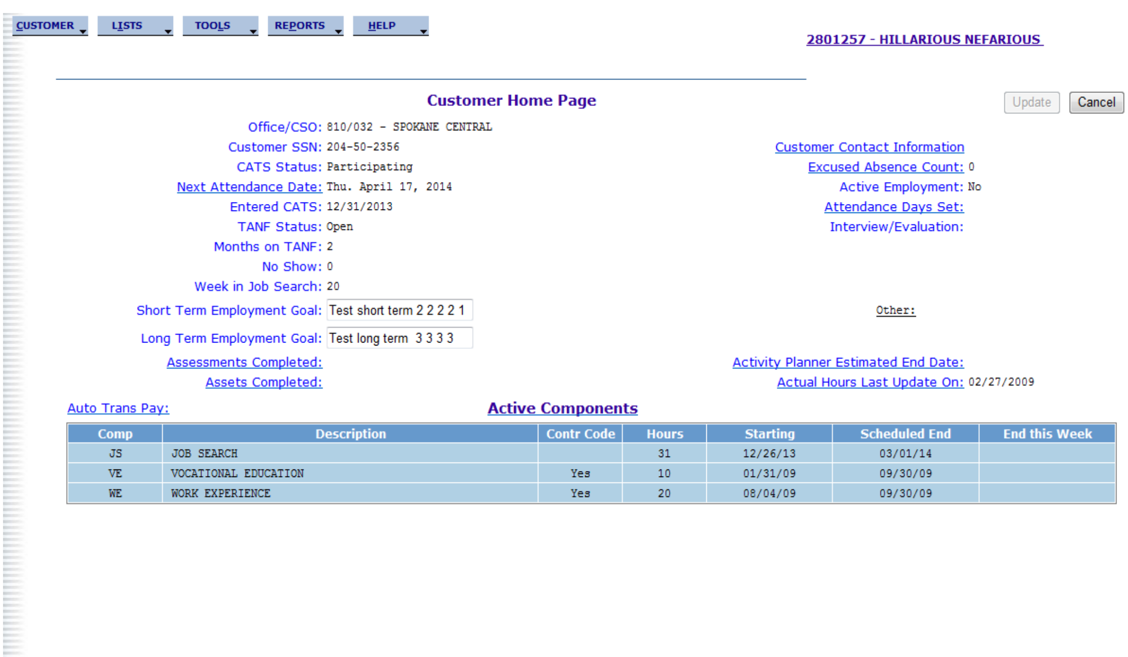
Job Search ends each day:

- When the participant ends their last job search activity (for example online application, completes a thank you letter), **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

Calculate on the participant's completed Plan of Activities the actual hours of participation for each day. Include and record the total hours even if they exceed the required daily hours of participation.

> **Remember:** Actual hours should be entered in CATS weekly, but is required to be entered at least every two weeks. All hours for each month must be recorded by the 10th of the following month

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 or 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 indicate attempts to contact the case manager and 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.

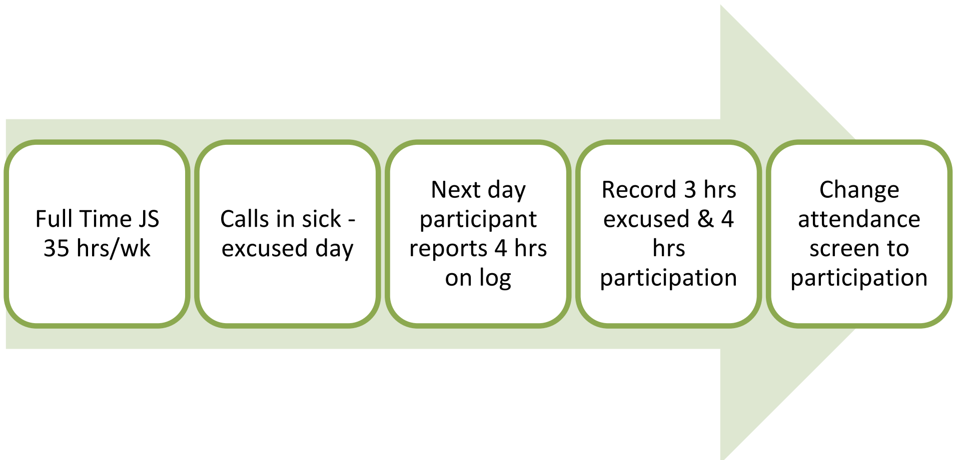
Required Hours of Participation	Maximum Excused or Holiday Hours **+ Participation Hours**
7 hours per day	7 hours per day
4 hours per day	4 hours per day

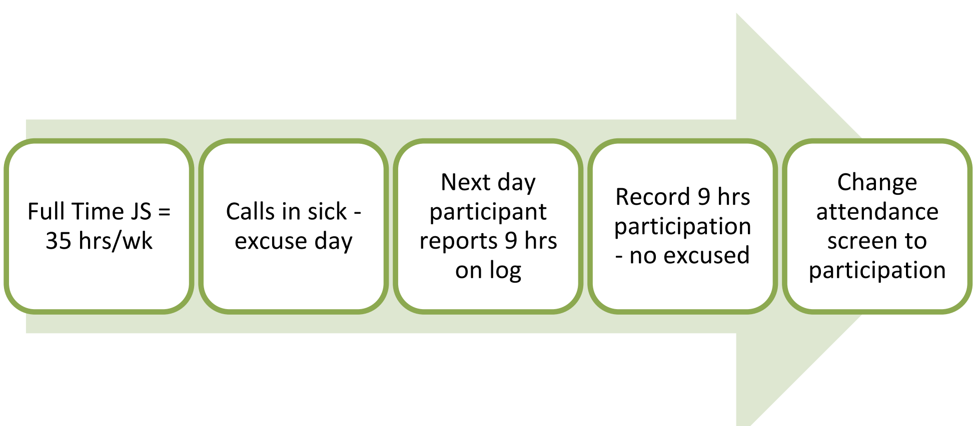
If a participant provides an Activity/Job Search log on a day they had called to be excused and it meets or exceeds their required participation for that day, do not record the hours as excused. Record these hours as participating to the maximum allowed per day. Remember to change the Attendance History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

Phase II: Asset Development

Here are some examples showing how to handle different situations.





Part time JS 20 hrs/wk → Calls in sick - excuses for the day → Next day reports did not participate → Record 4 hrs excused

Part time JS 20 hrs/wk → Calls in sick - excuse for day → Next day reports logs with 2 hrs participation → Record 2 hrs excused & 2 hrs participation → Change attendance screen to participation

Part time JS 20 hrs/wk → Calls in sick - excuse for day → Next day reports log with 6 hrs participation → Record 6 hrs participation, no excused → Change attendance screen to participation

Determine and record holiday hours exactly the same.

> **Remember:** On any day that is **not** an Excused Day or a Holiday, the participant can go over the required hours and you can record them in actual hours. Only excuse the number of hours required to meet the need. Example: Doctor's appointment for 2 hours.

Phase III: Employment Pathways

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

Job Search (JS) Progress Evaluations

A Job Search Progress Evaluation is an evaluation conducted and recorded in eJAS notes at the end 7, 14 or 28 days of Job Search during the one-on-one coaching session. A participant's participation track (A, B or C) identifies the frequency of the evaluations (7, 14 or 28 days).

What happens during a Job Search Progress Evaluation?

- Discuss a participant's job search progress and any recommendations for other WorkFirst services.
- If the recommendation is not for continued Job Search, schedule a CAP, after the CAP, manually close the Job Search (JS) component code, enter a Refer Back (RB) code, and note in eJAS.

What should be considered when determining progress during a one on one coaching session/progress review?

- How many weeks has the participant been in job search?
- Did they participate for the required number of hours?
- What has been the participant's progress since the last coaching session?
- What has prevented the participant from getting a job?
- Would the participant benefit from an activity other than job search?

Phase III: Employment Pathways

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 whose 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 100% 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 per 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)

OJT Guidelines

(Use the WorkFirst Internal Controls Manual Section 6 for step-by-step instructions.)

Training must be related to the participants short or long term employment goals outlined in their employment skills assessment. 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 or staff person if your office as one 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.

Phase III: Employment Pathways

Wage Progression OJTs

- 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."

Employer Reimbursement

Employers are reimbursed for no more than 50% of the wages paid for work during the training period. Holidays, overtime or vacation time are 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 the 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 pay for the loss. Take wage issues 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 the 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. (Section 6)

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. OJT employers must cover this cost.

Employment Security Department (ESD) will only pay Labor & Industries coverage for Work Experiences at an Employment Security work site.

ESD Work Experience (WEX)

A Work Experience (WEX) 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.

Eligibility

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.

WEX 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.

Phase III: Employment Pathways

WEX 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 within aan ESD state agency site.
- 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 only pay Labor & Industries coverage for ESD Work Experiences conducted at an ESD worksite. 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, PO Box 9046, Olympia, WA. 98507-9046) to start the L&I coverage.

Support Services

Use the Internal Controls Manual on Inside WorkFirst to find complete up-to-date information on all internal controls policies and procedures associated with support services available to participants including OJT and WEX contracts.

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
- If participant is receiving automatic transportation in CATS update the auto pay to reflect the component change

SKIES Documentation

Seeker Services as appropriate

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.
- Direct participant to DSHS WFPS to have IRP updated and if there are any changes in participation requirements

Temporary Employment

Temporary employment is 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, (WFHB 4.2.14) 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 (this could be a landlord) 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.

Recording 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 employee

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 DSHS Hub Imaging Unit (HIU) by the **10th** of the month following the employment month being recorded. The DSHS state Hub address can be found in Chapter 4 in the Resource Section. 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.

Phase IV: Workers & Careers

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) WF Handbook Chapter 2.1.2

Reports: Managing Your Caseload

SKIES Reports

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

CATS Reports (Reports Tab in CATS)

Report Criteria

Used to select an office for which a report is needed.

Actual Hours Entered - 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 Fulltime – This report displays (at the end of the month) a monthly the total number of participants in fulltime job search (30 hours) and of this total the total that met participation for the month.

Actual Hours Fulltime Days in JS – This report displays (at the end of the month) a monthly the total number of participants in fulltime job search (30 hours) and of this total the total that met their participation requirements for the number of days they were in job search for the month.

Actual Hours Part time Days in JS – This report displays (at the end of the month) a monthly the total number of participants in part time job search (29 or less hours) and of this total the total that met their participation requirements for the number of days they were in job search for the month.

Counts/Location - 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

Counts/Date - 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)

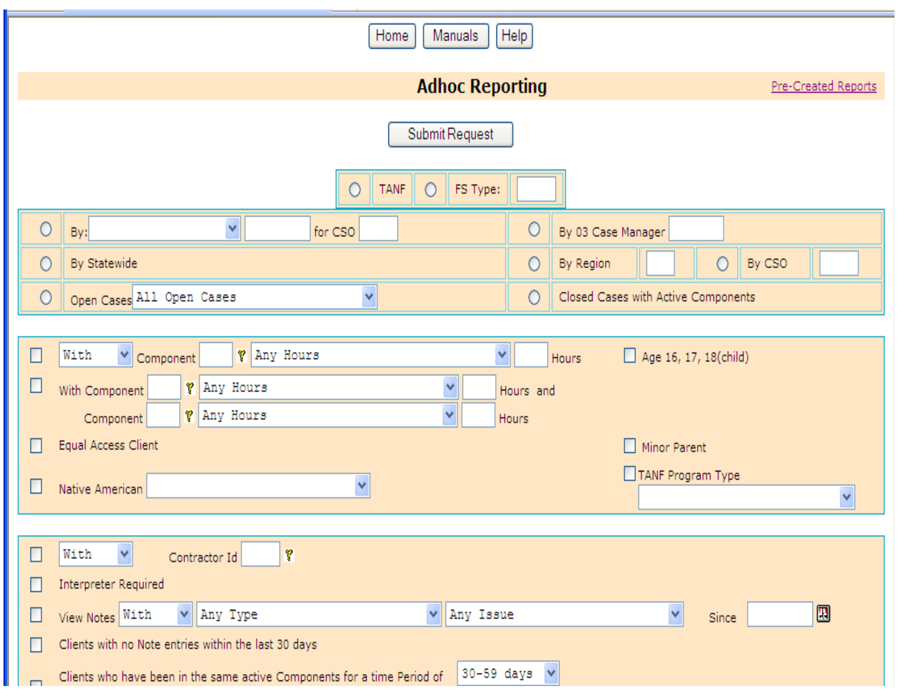
Auto Pay Exception – This report displays did not process and the reason. The report can be sorted by name or date of auto pay run.

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.

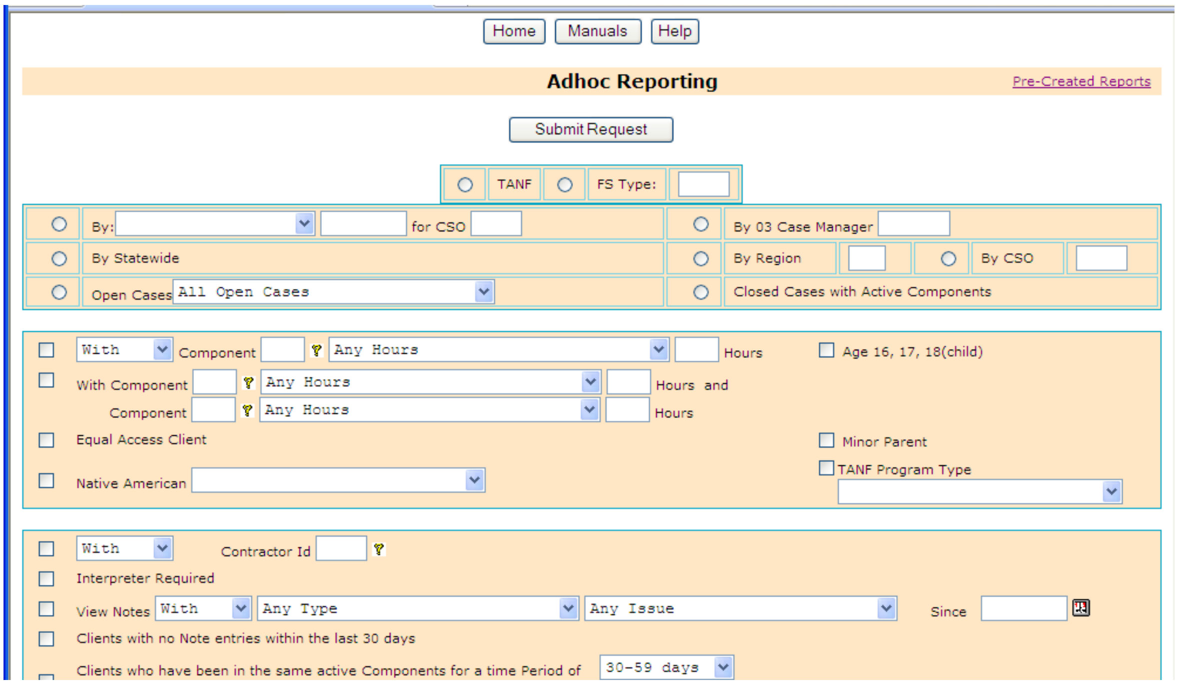
Work Experience - This is a read-only report of customers who are in an ESD managed WE component for the time period selected

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.



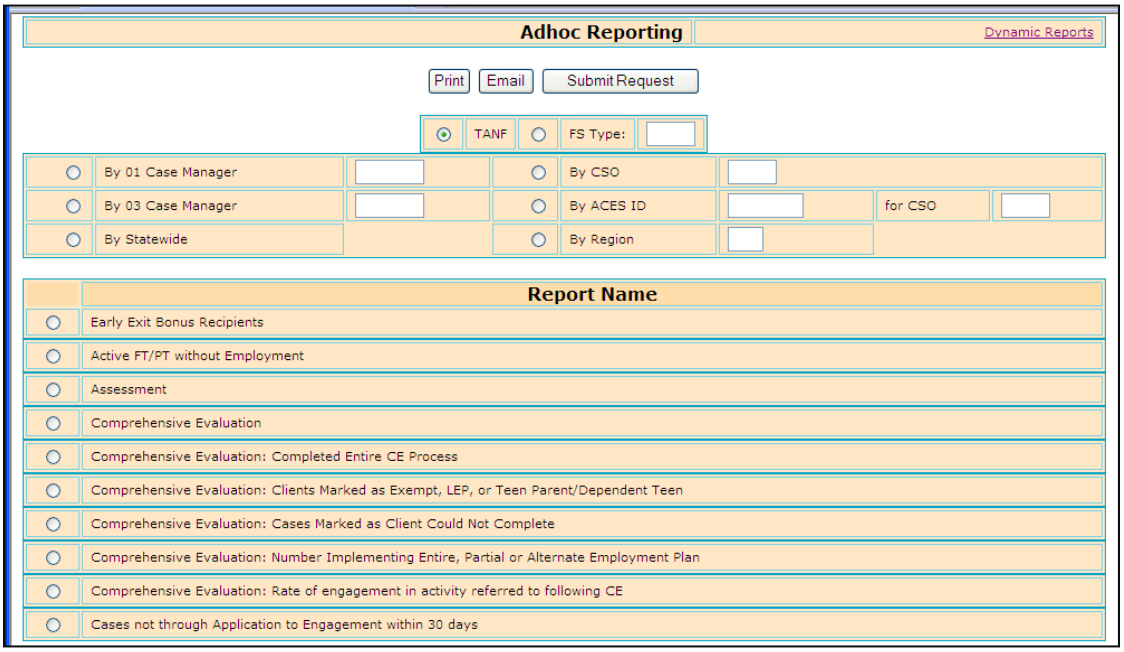
Pre-Created Reports: This function provides detailed information primarily for the Comprehensive Evaluation and is available from the Adhoc Reporting Screen.



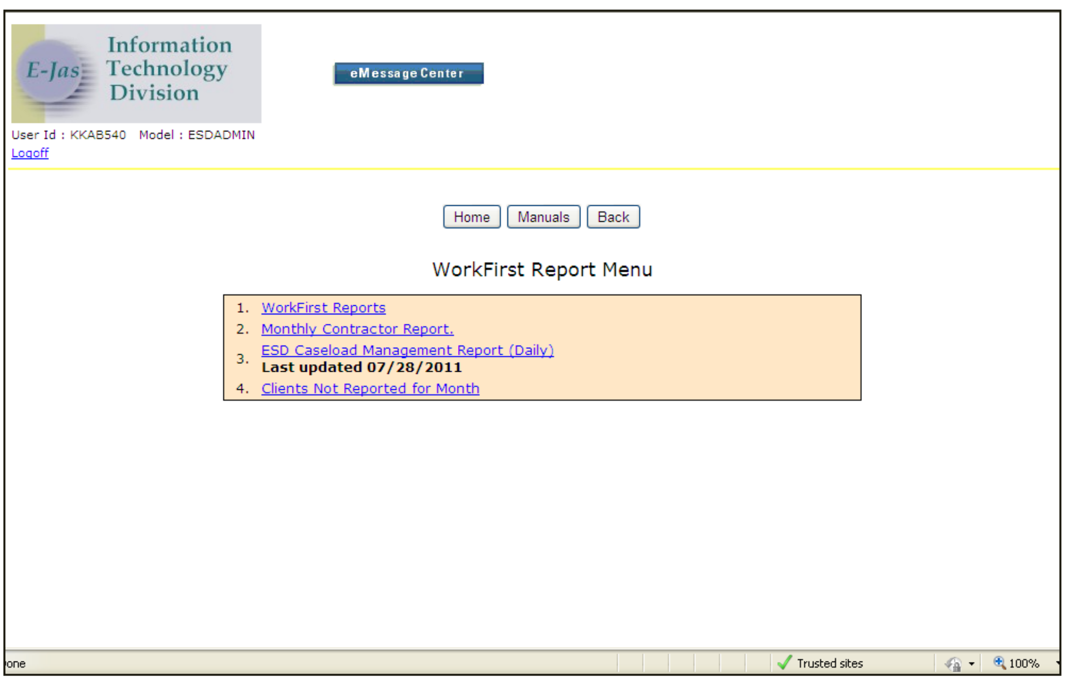
You can view specific areas on the Pre-Created Report to determine management approaches to improve services delivery.

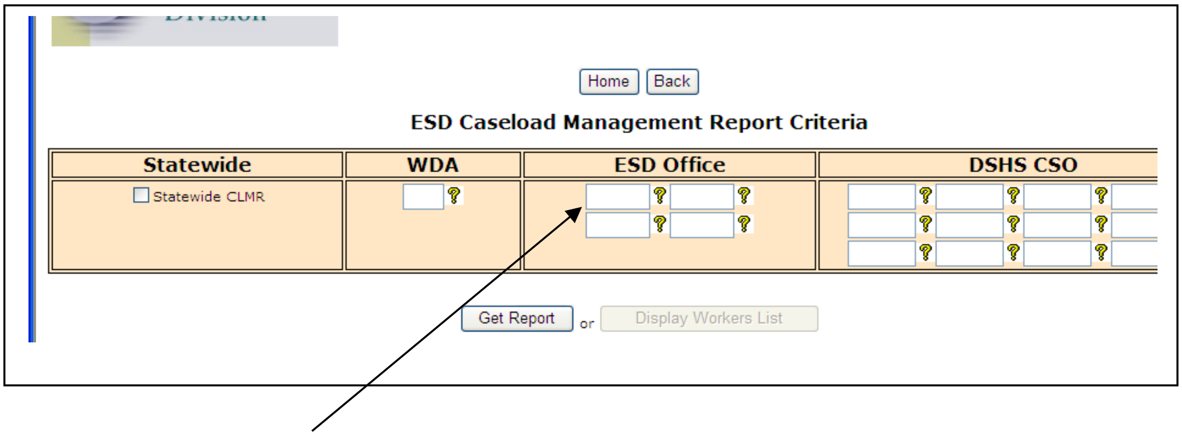
WorkFirst Reports Menu is accessible through CATS or eJAS.

Select WorkFirst Reports menu

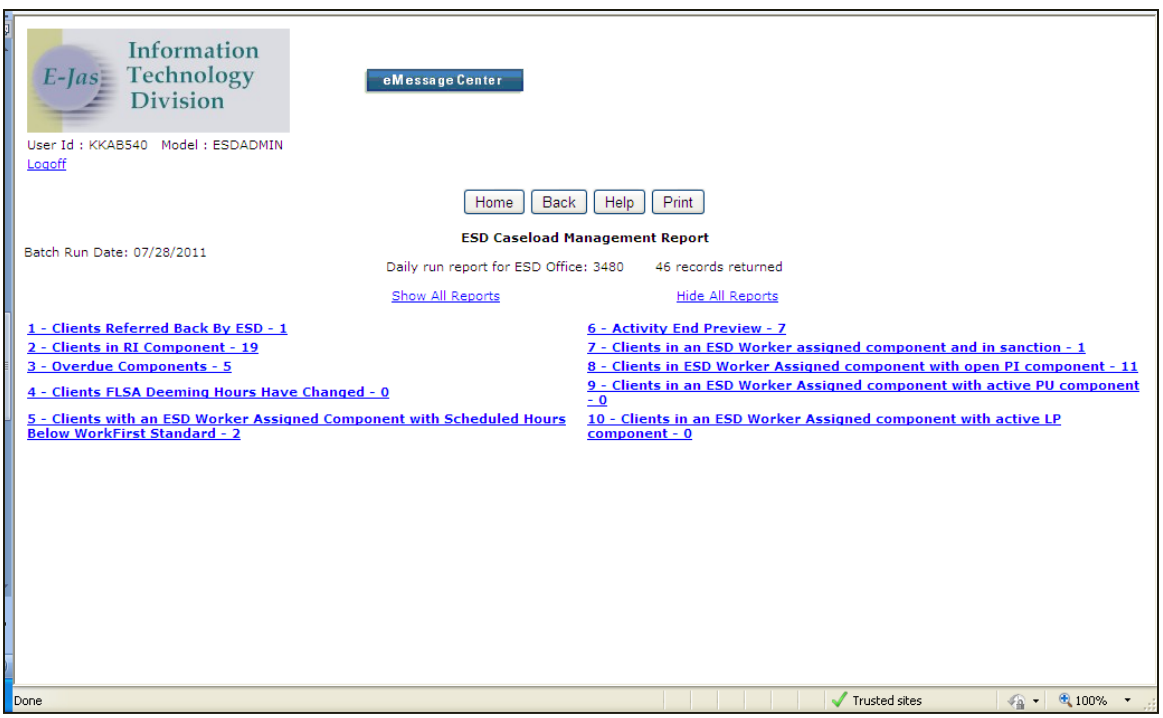


ESD WorkFirst related information is in item 3



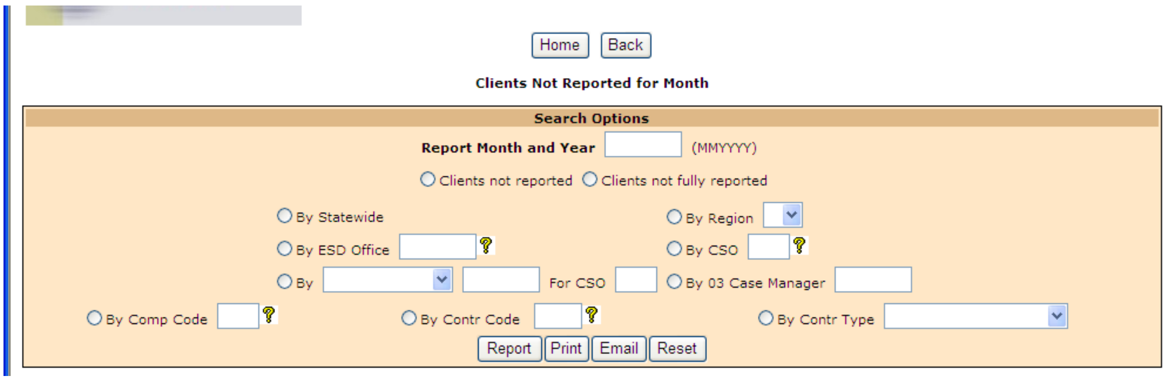


Once you select an office, you are provided a menu to choose from to view the specific participants in each category. Example: Viewing the "Clients in the RI Component" will let you know who was placed in RI the date before. These participants are the ones you should see on the day the report is run.

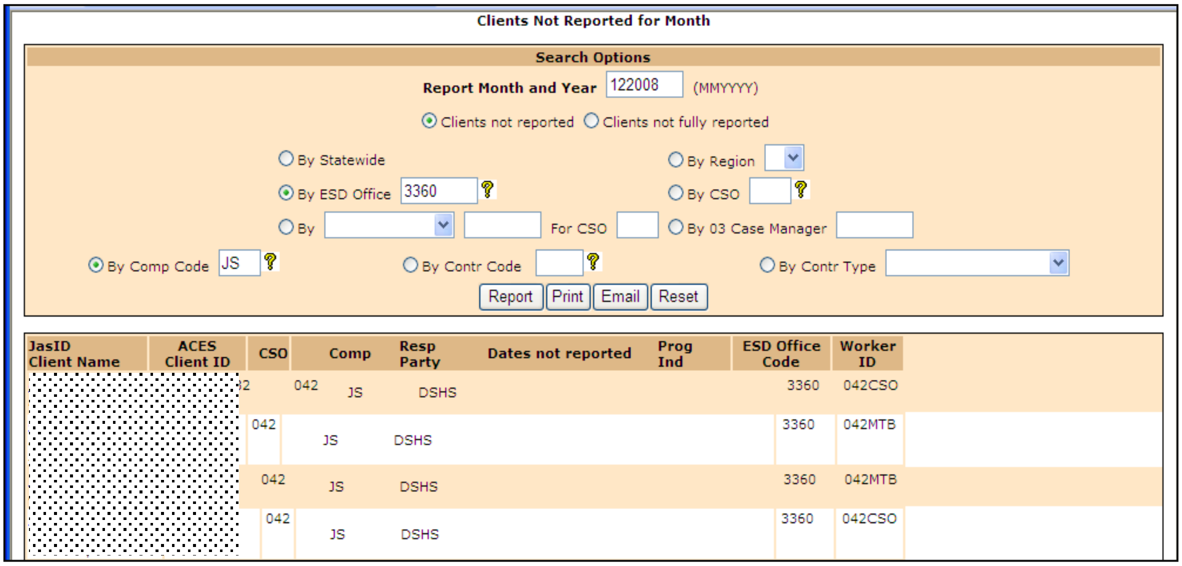


Reports: Managing Your Caseload

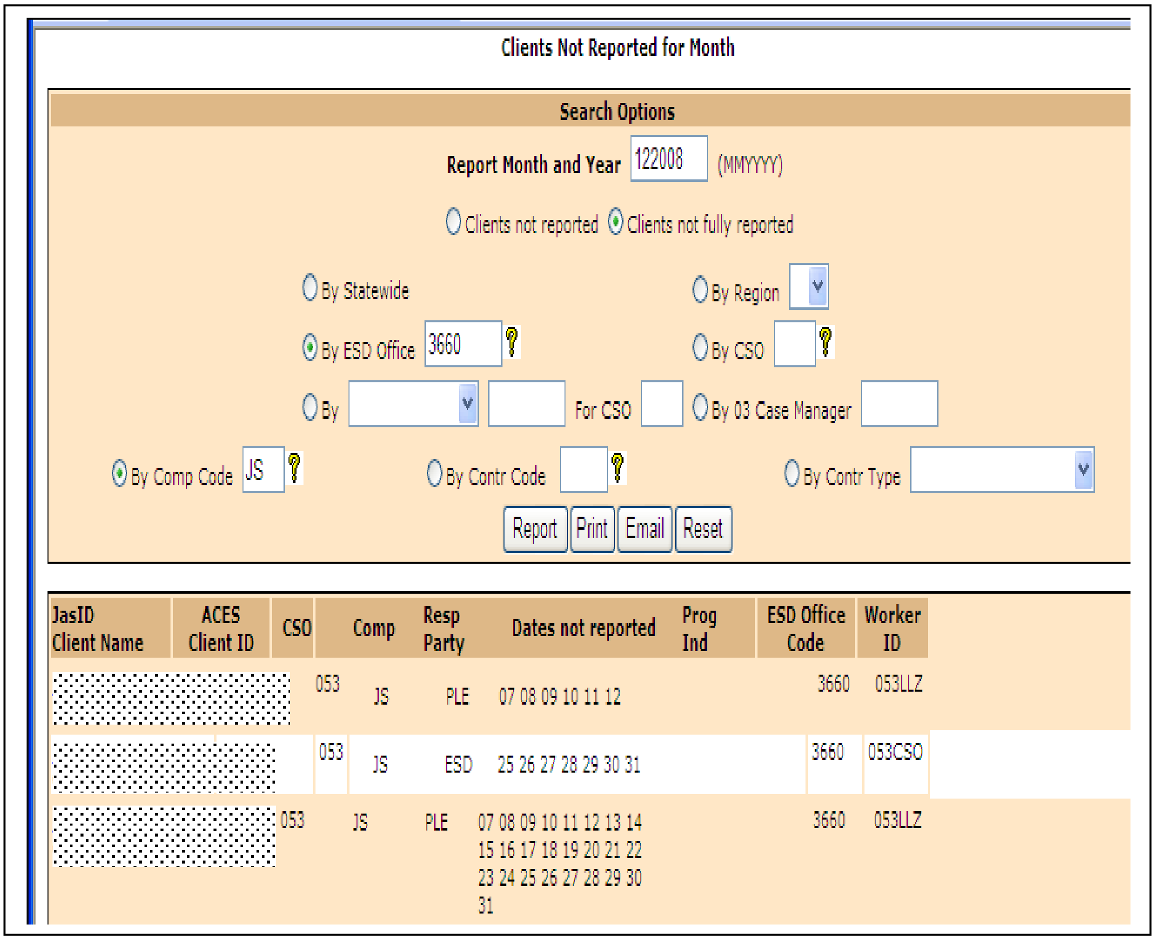
Clients Not Reported For The Month: This information is available in CATS as the "Actual Hours Required List." This report in eJAS, as in CATS, shows participants who are missing dates reported during the timeframe the component is open during a month. Information is available for the current month and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



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
[redacted]		053	JS	PLE	07 08 09 10 11 12		3660	053LLZ
[redacted]		053	JS	ESD	25 26 27 28 29 30 31		3660	053CSO
[redacted]		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

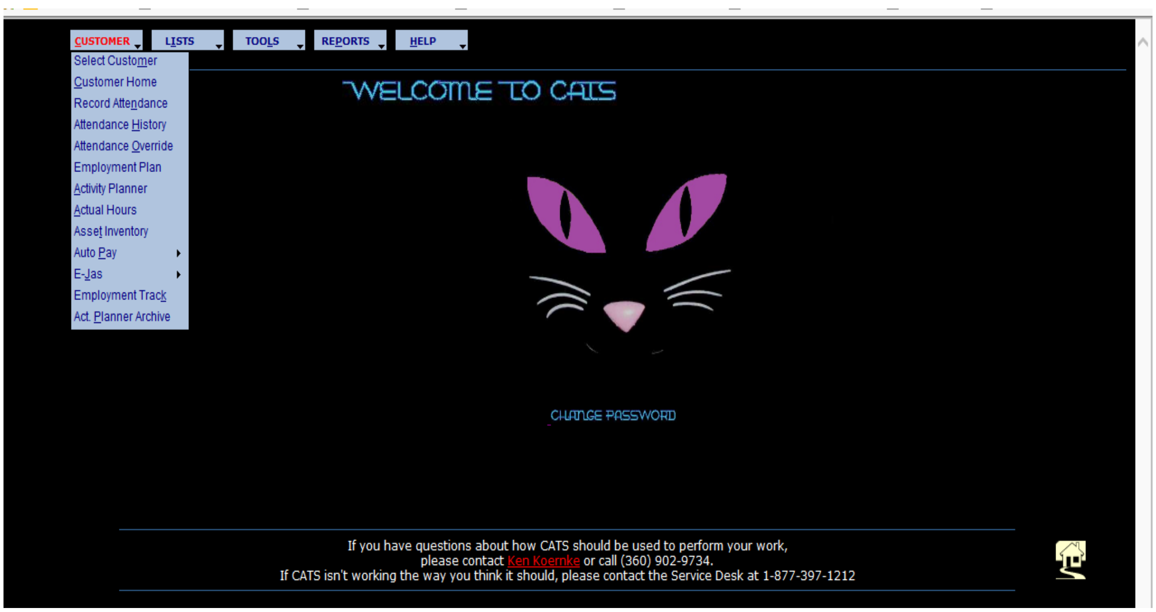
- Unpaid Voucher Report
- Unpaid Voucher Report for Vendor (Letter)
- Outstanding Obligation Report

The WorkFirst Internal Controls Manual (Section 7) provides complete information on JAS reports.

CATS (Customer Automated Tracking System)

CATS is ESD's electronic data and recordkeeping tool for all WorkFirst participants assigned to ESD to serve. Data in CATS is transferred into CATS from the Department of Social and Health Services (DSHS) eJAS electronic system and/or directly inputted into CATS by ESD Career Coaches.

Customer Menu



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:

When searching for a customer by name, you can use one of three search filters:

- 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** or **Part of the Last Name** or **First Initial of the Customer's First Name**.
4. Click on the **Find** button. All names that match the selection criteria are displayed.

   NOTE: 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, All Customers In CATS or All Customers In eJAS.

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.

Customer Home

- Click **Customer Home** on the Customer tab or 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.

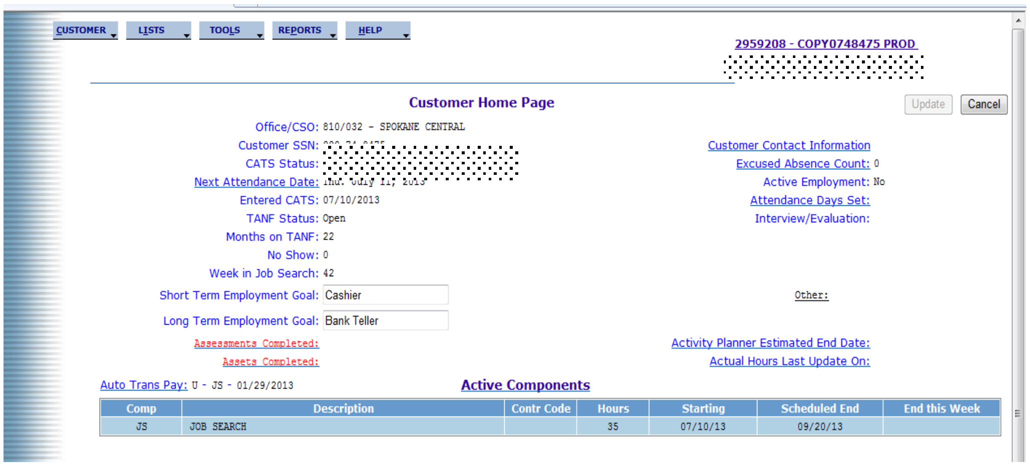
- **Months on TANF** - number of months the customer has been on TANF.
- **No Show -** number of no-shows for the current month and most recent Job Search component (no-show count reset monthly).
- **Week in Job Search** - current week of the customer's job search efforts.
- **Short Term Employment Goal** – 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** Contact Information - 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.
- **Assessments Completed** - links to the Asset Inventory screen.
- **Assets Completed** - links to Asset Inventory screen.
- **Customer Contact Information -** Opens screen with contact information
- **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.
- **Active component** - linked to the Active Components in eJAS.
- **Auto Trans Pay** - linked to the Auto Pay Request History screen.
- **Activity Planner Estimated End Date**: No longer used.
- **Actual Hours Last Updated On**: Provides the date updated and a link to the actual hours input screen.



Record Attendance

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 [date].

- **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 not requiring 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 [date].

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.

   NOTE: 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 is 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 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
5. Click on the **Sign In** button. The following message appears:

   You have recorded attendance for [customer's name]. Their Next Attendance Date is [date].

   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.

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 [date].

   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 and Supervisors can change the attendance history as follows:

- Participating to excused or no-show,
- No show to participating or excused, or
- Excused to participating or no-show

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

Attendance Override

NOTE: Customers in job search are required to participate daily unless their DSHS case manager or ESD coach 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, the ESD coach sets the attendance requirements.

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.

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).

Employment Plan (No longer used)

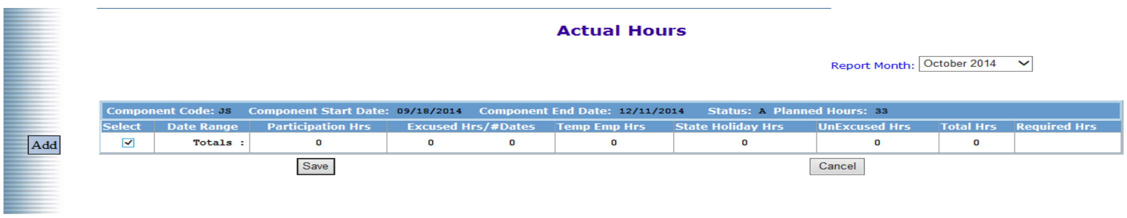
This is no longer used.

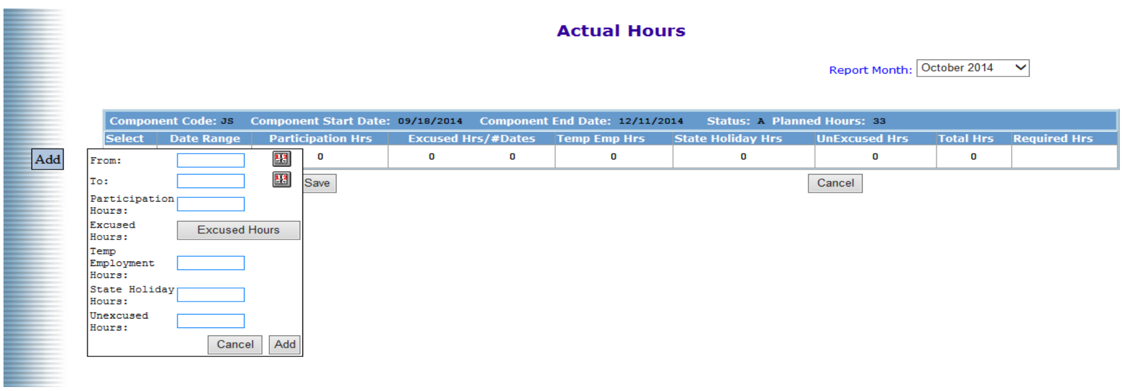
Activity Planner

ESD employment coaches use the Plan of Activities (POA) to list weekly required activities for participants. The POA is not currently available in the CATS system. See Appendix A for form use and completion.

Actual Hours

ESD's Workforce & Career Development Division (WCDD) has a contractual requirement to track and report the actual hours of participation for each participant enrolled in Job Search, Work Experience (WEX), and Job Training activities. Employees use the actual hours screen to enter actual hours of participation, holiday hours, excused absences, unexcused absences and temporary employment hours.





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.
8. 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 enter a zero. Valid entries for partial hours are .25 (15 minutes), .50 (30 minutes), or .75 (45 minutes) for all hours fields.
9. 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.

10. Key in **State Holiday Hours** – Use as required.
11. Key in **Unexcused Hours** – Use as required.
12. Key in **Temp Emp Hours** – Used only for verified Temp. Emp. Hours. .
13. Click on the **Add** button to add the information and return to the Actual Hours page.

Caution: the data entered is not saved until the Save button on the Actual Hours page is clicked.

14. Click on the **Save** button.
    This will display a pop-up box with the following message: Successful Save.
15. 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.
5. 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.
6. Enter in the data changes.
7. Click on the **Update** button to update the data and return to the Actual Hours page.

   Caution: the data entered is not <u>saved</u> until you click the Save button on the Actual Hours page.

8. Click on the **Save** button. This will display a pop-up box with the following message:

   Successful Save

9. 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.

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 **Asset Inventory** 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.

Note: 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
   - Résumé 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.

Auto Pay

Customers may receive up to eight consecutive bimonthly automatic transportation payments once they start their job search activities or two payments when they become employed. 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.

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 set up 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.
h. **Create Date/ Time** – the date and time that the auto pays was created.
i. **User** – the logon id of the person who created the auto pay.
j. **Update Date/ Time** - the date and time the auto pay request was last updated.
k. **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.

3.
    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. The customer must see their DSHS Case Manager to have their mailing address updated.
4. Click on the **Save button**.
5. 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.
4. Click on **Create/History** on the drop down menu to display the Request History screen.
5. 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.
6. Click on **Update** on the side menu to bring up the update Auto Pay request screen.
7. Make the **Changes** to the appropriate fields.
8. Click on the **Save** button.
9. Click on **Ok** on the confirmation pop up box.

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.

<u>Note:</u> 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.

<u>Note:</u> 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**.
3. 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.
4. 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.

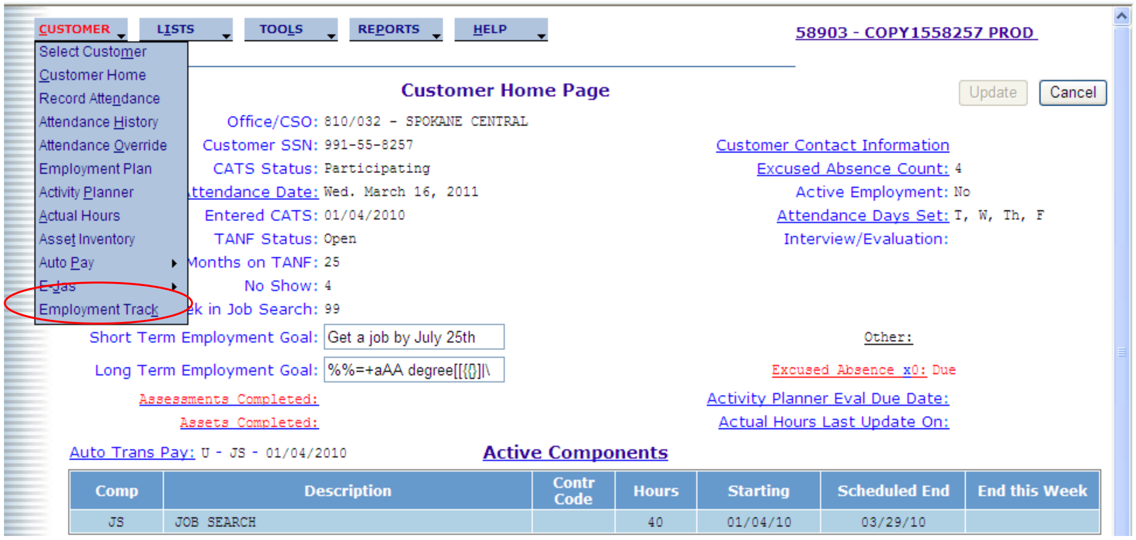
Participation Tracks

WorkFirst coaches will utilize the Participation Tracks (formally Employment Tracks in CATS) when a participant enters Career *Scope*. Track selection is determined between the coach and the participant based on demonstrated participation in previous activities and work search readiness criteria as outlined in the Chapter 4.2 of the WorkFirst Handbook. Coaches may move participants between tracks as they progress in their work readiness activities and work search.

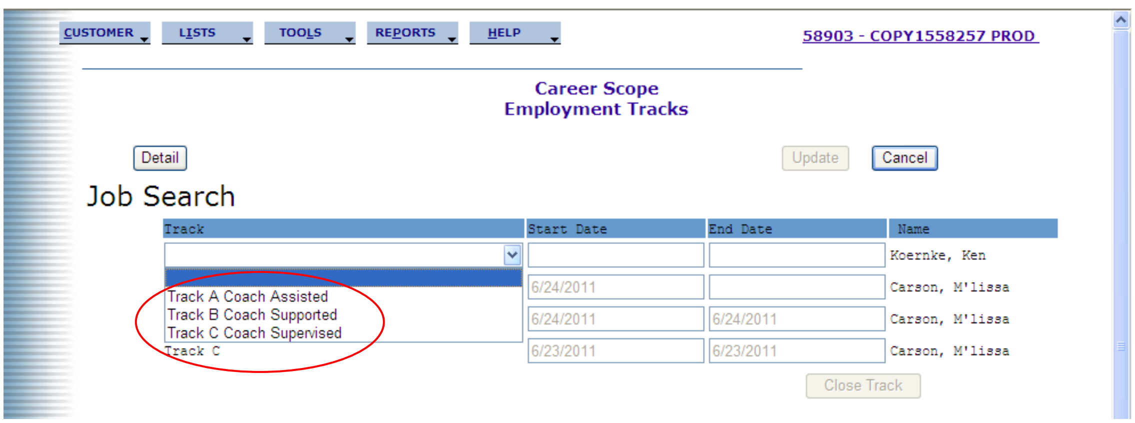
The following participation track selection guide illustrates how to select a track, move participants between tracks or close a track once a participant leaves Career *Scope*.

Selecting a Track

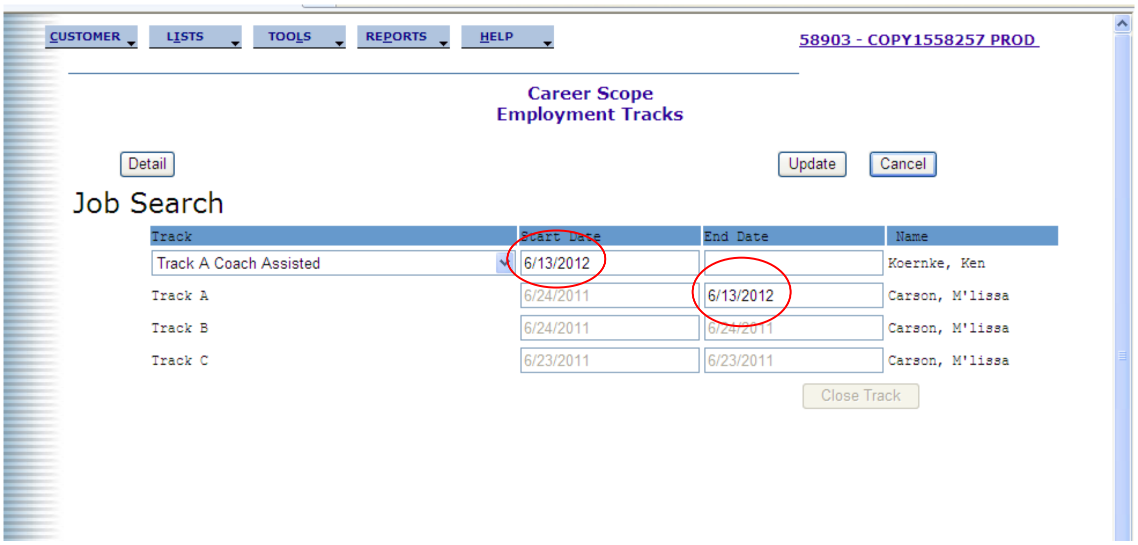
From the Customer Home Page under the Customer Tab, select **Participation Track.**



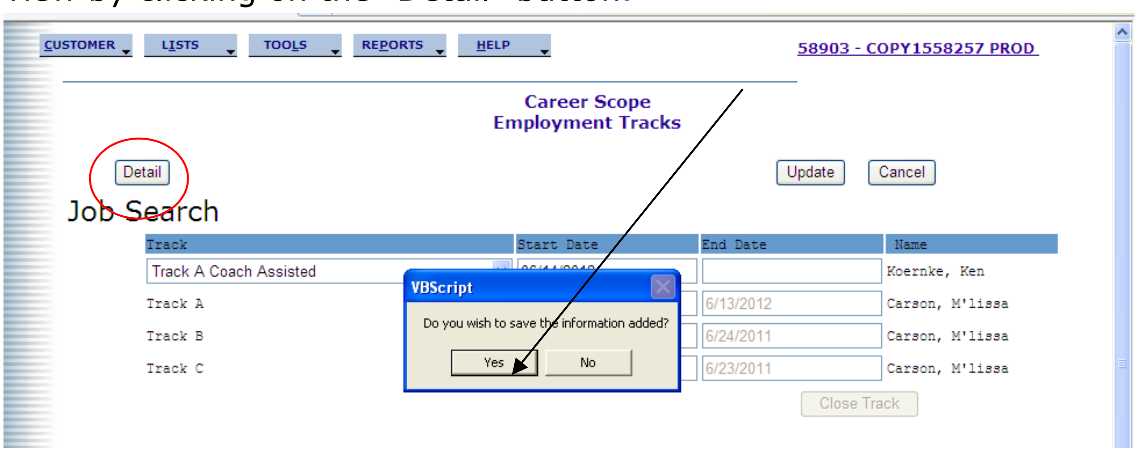
On the **Career *Scope* Employment Tracks Screen,** use the Track Selection box to select the track you want to start for the participant.



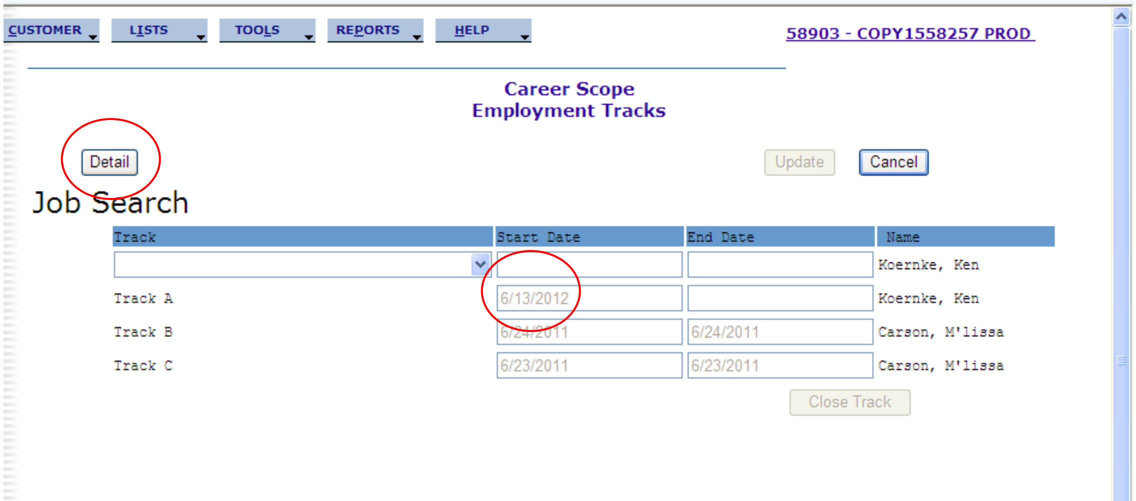
In the example below Track A was selected. Because the participant had an Open Track A it was automatically closed when a new Track A was selected.



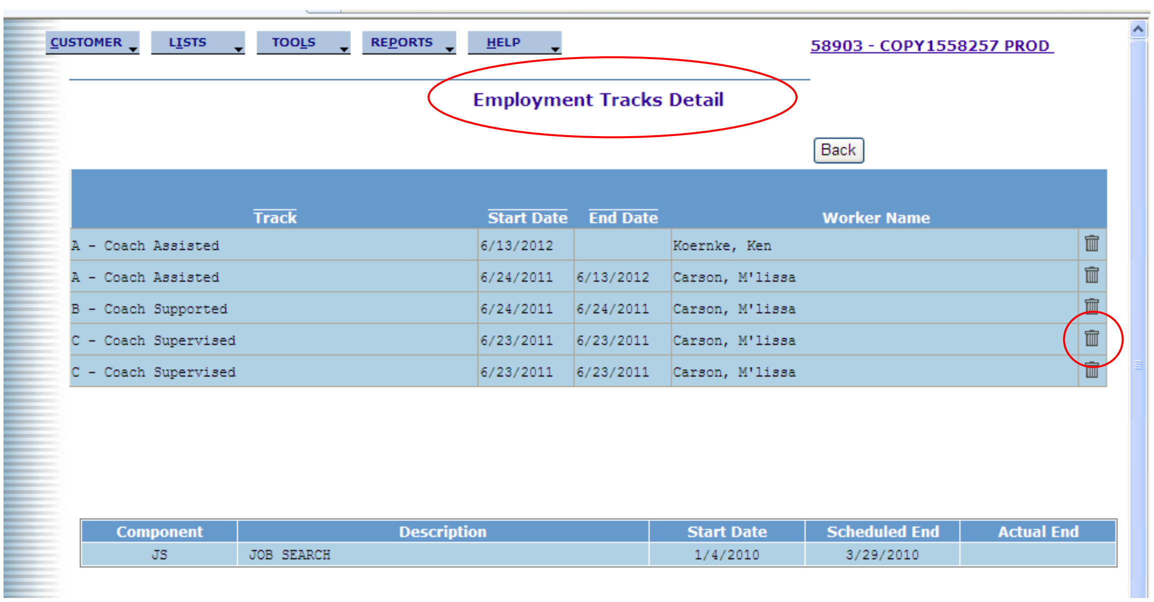
Once the date is entered you must click on "Update" and select "Yes" to save the change. The previous Track A will disappear and the screen now shows the current Track Information. The old Track A can still be view by clicking on the "Detail" button.



The selected Track (example Track A) with the selected date will now be displayed.



Clicking on the **"Detail"** button will display the participants **"Employment Track Detail"** screen.

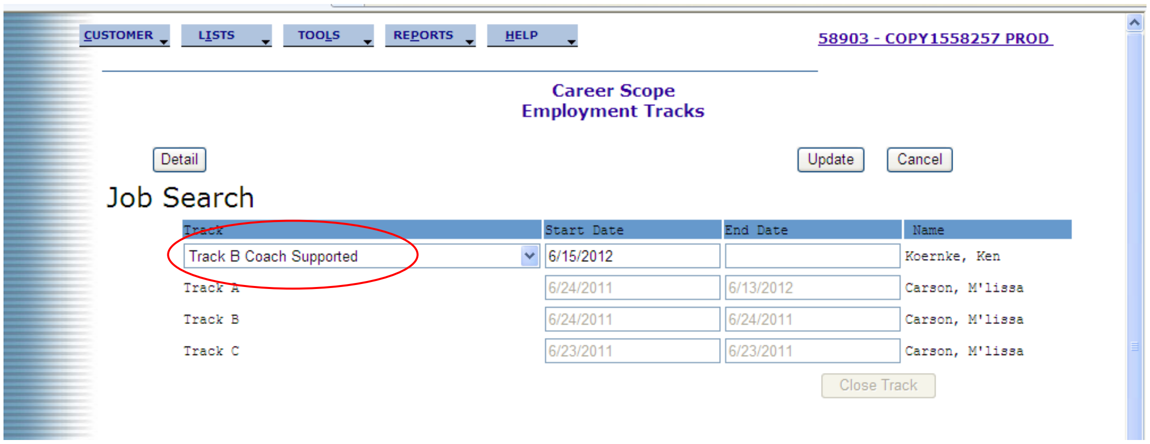


If you make a mistake in selecting a Track you can delete that selection by clicking on the Garbage Can symbol.

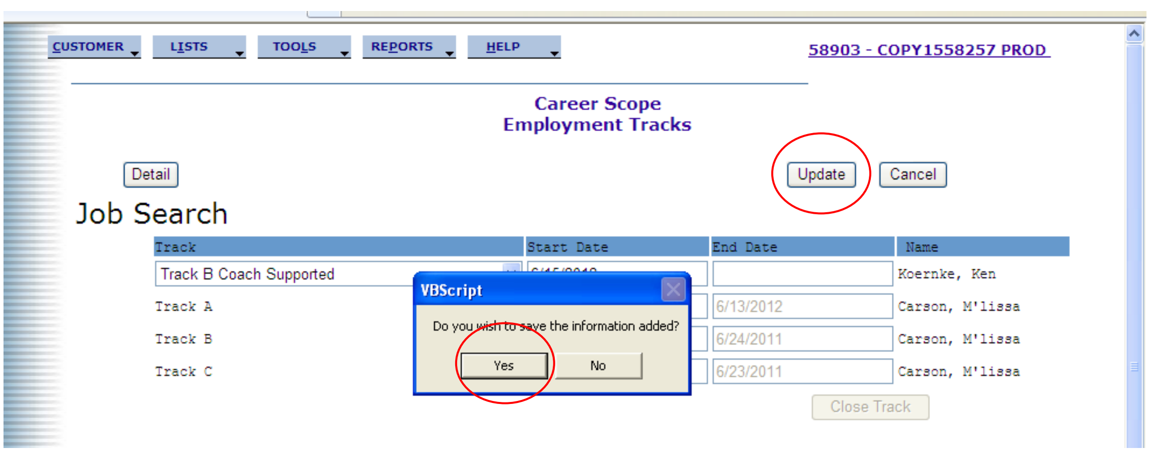
CAUTION: If you click on the Garbage Can the Track is deleted. You **will not** be asked if you are sure you want to delete the track.

Selecting a New Track

A new Track is selected in the same manner as selecting the beginning track. In the example below Track B was selected.

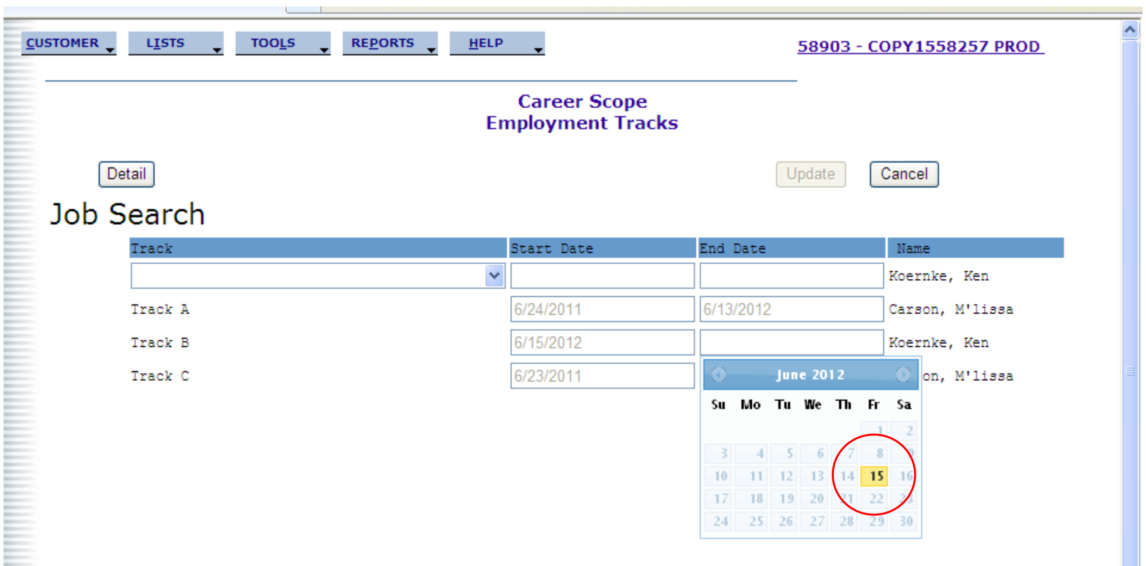


Remember: To save a Track Selection you must click on **"Update"** then select **"Yes"**

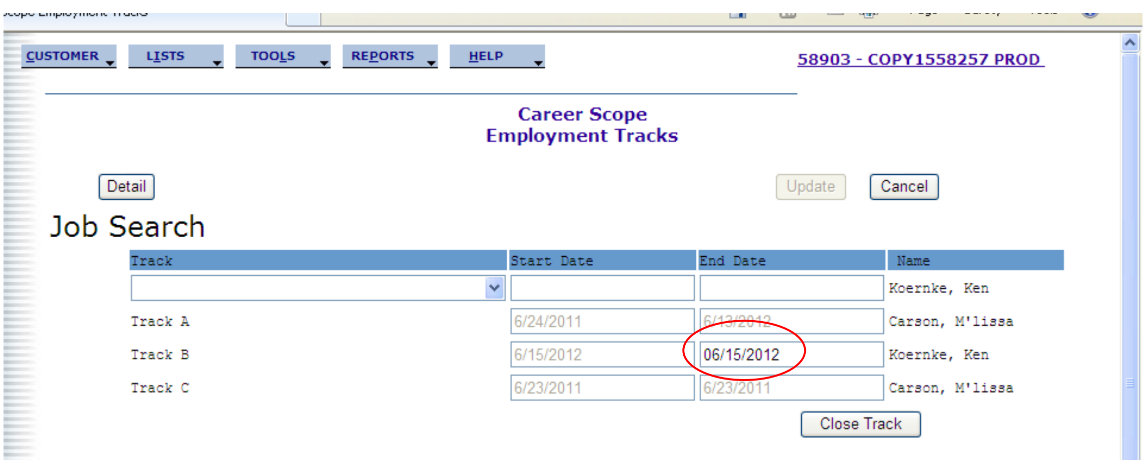


Closing a Track

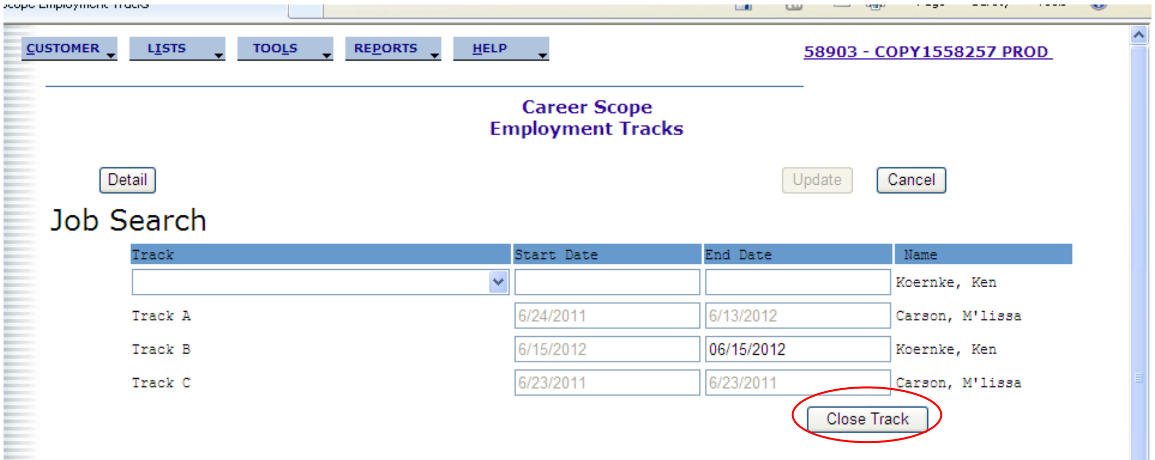
To close a track (when a new track is not being selected) double click in the "End Date" box for the Track you want to manually close. It will bring up a calendar to select an end date from.



Click on the date on the calendar that you want as the end date. This date will appear in the **"End Date"** Box as shown below.



Next, click on the **"Close Track"** button to complete and save closing the Track



The track is now closed and saved.

Use the **"Detail"** button to see all track details, including the one just closed.

Lists Menu

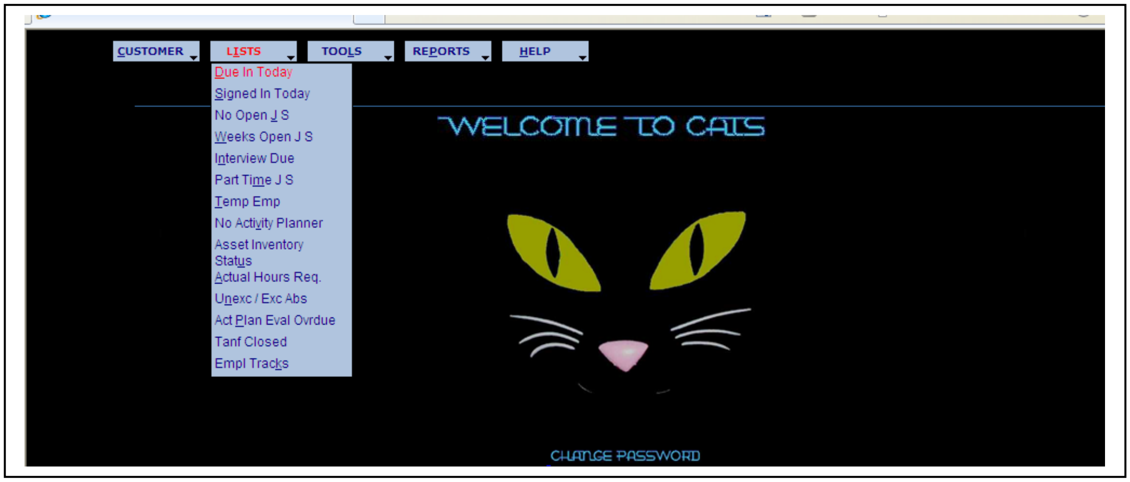
The List function helps employees manage all participants assigned to their office. You can quickly review a specific activity for all participants receiving services.

The List tab allows staff to view the following information about the local office.

- Due in Today
- Signed In Today
- No Open JS
- Weeks Open JS
- Interview Due
- Part Time JS
- Temp Employment
- No Activity Planner (no longer used)
- Asset Inventory Status
- Actual Hours Required
- Unexcused/Excused Absences
- Activity Planner with closed JS (no longer used)
- TANF Closed
- Employment Tracks

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.

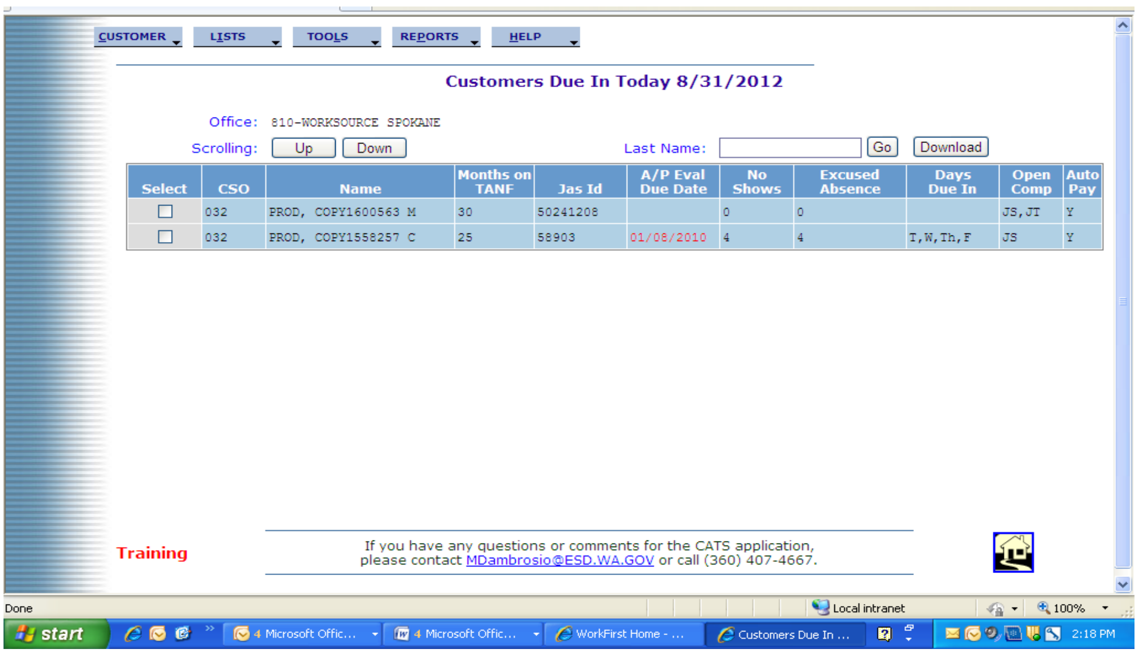


Review the Due In Today List

1. Click on **Due In Today** on the Lists tab.
   This will display a list of Customers.
   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 one of the following items from 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 screen.
   - **Activity Planner** – links to the Activity Planner
   - **Actual Hours** – links to the Actual Hours screen.
   - **Asset Inventory** – links to the Asset Inventory screen.

-
- **Auto Pay** – links to the Create History or Payment History.
- **eJAS** – links to DSHS eJAS.
- **Employment Track** – Links to the Employment Track screen.

4. 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.
5. 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.



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) 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:

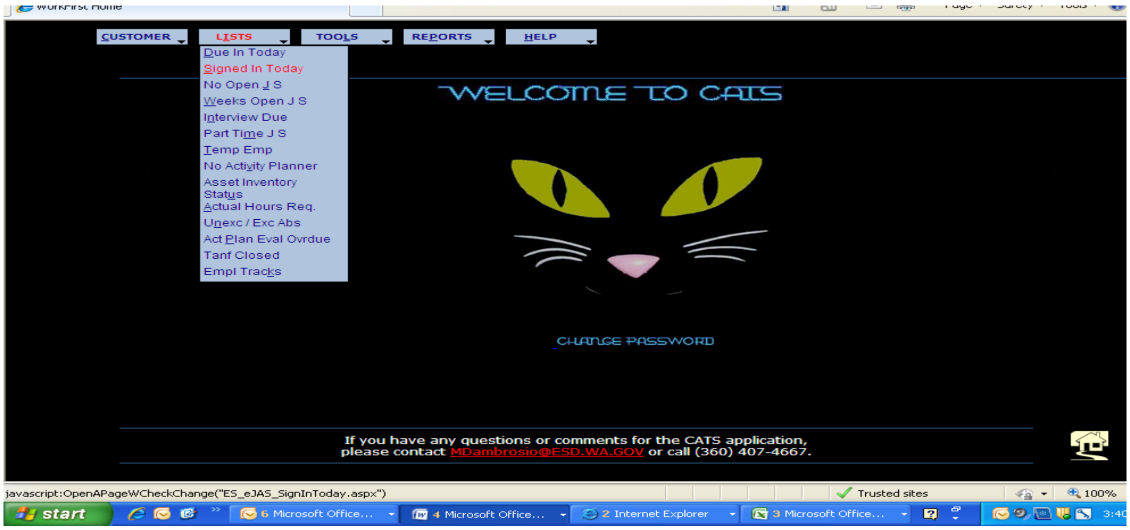
   - Next Attendance Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number
   - Activity Planner Eval Due Date
   - Number of No Shows
   - Days Due In
   - TANF Case Status
   - Participation Status
   - All Open Components
   - Auto Pay
   - Number of Excuses

Signed in Today

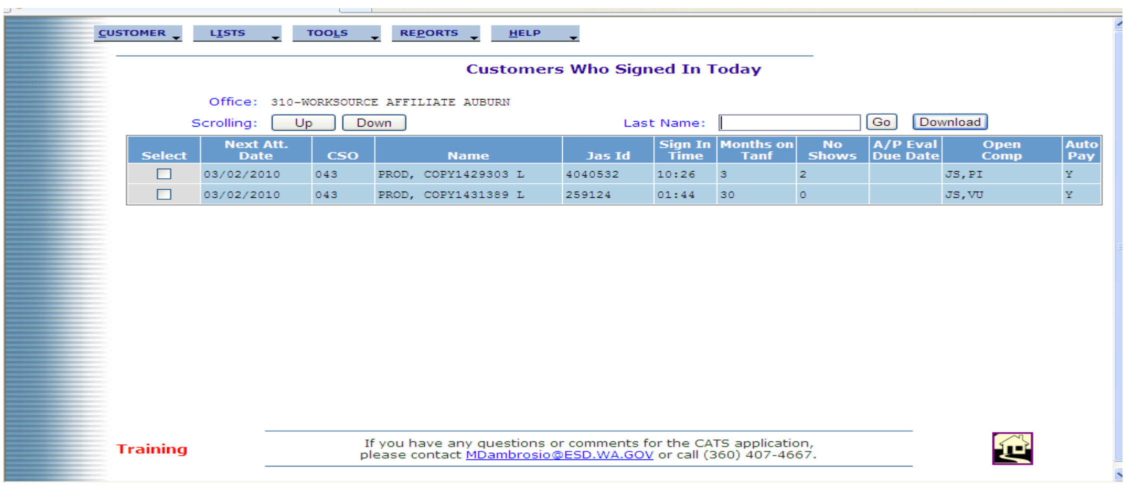
Real time list of Customers who have signed in or were signed in today. This is a read only list with links to other CATS screens that can be updated or reviewed.

Review the Signed In Today List

Click on the **Signed in Today** on the Lists tab



Customers Who Signed in Today List



1. This will display a list of Customers with the following information:
   - Next attendance Date
   - CSO
   - Full Name
   - JAS ID Number
   - Sign in Time
   - Numbers of No Shows
   - Activity Planner A/P Evaluation 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. This is the same process as with the Due In Today List.

How to 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. The options are the same as the Due In Today List.

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) <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
   - JAS ID Number
   - Sign In Time
   - Months on TANF
   - Number of No Shows
   - TANF Case Status
   - Participating Status
   - A/P Eval Due Date
   - All Active Components
   - Auto Pay

No Open JS

This provides 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 same process as the Due In Today List.

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.
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.
3. Click on the **Select** box in front of the desired customer.
4. Click on **Remove** on the pop-up menu.
5. Click **Ok** on the pop-up box that requests if you want to remove the customer from the No Open JS list.

The customer's 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

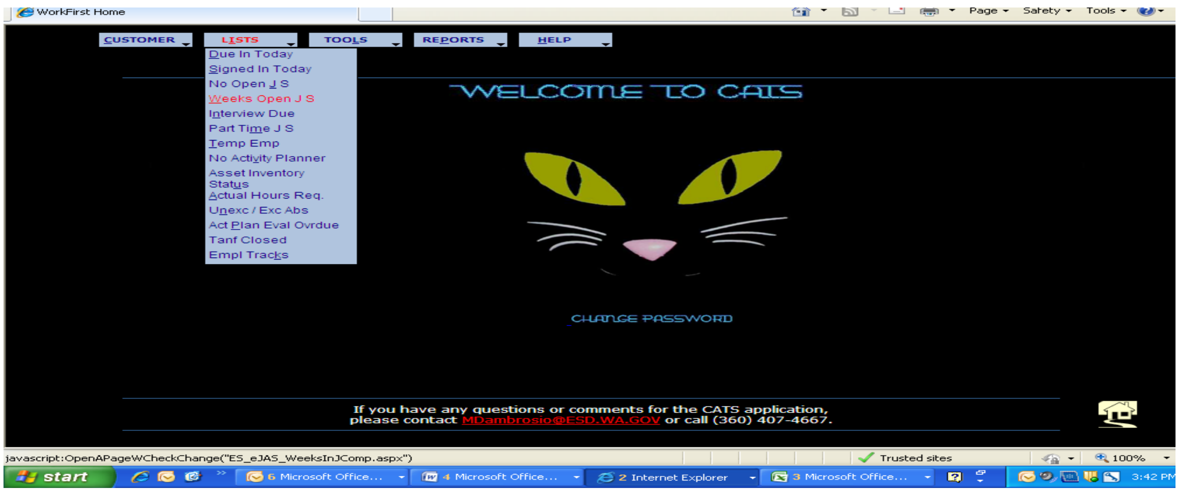
1. Click on **No Open JS** on the Lists tab. This will display a list of customers.
2. Click on the **Download** button. A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a disk). 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:

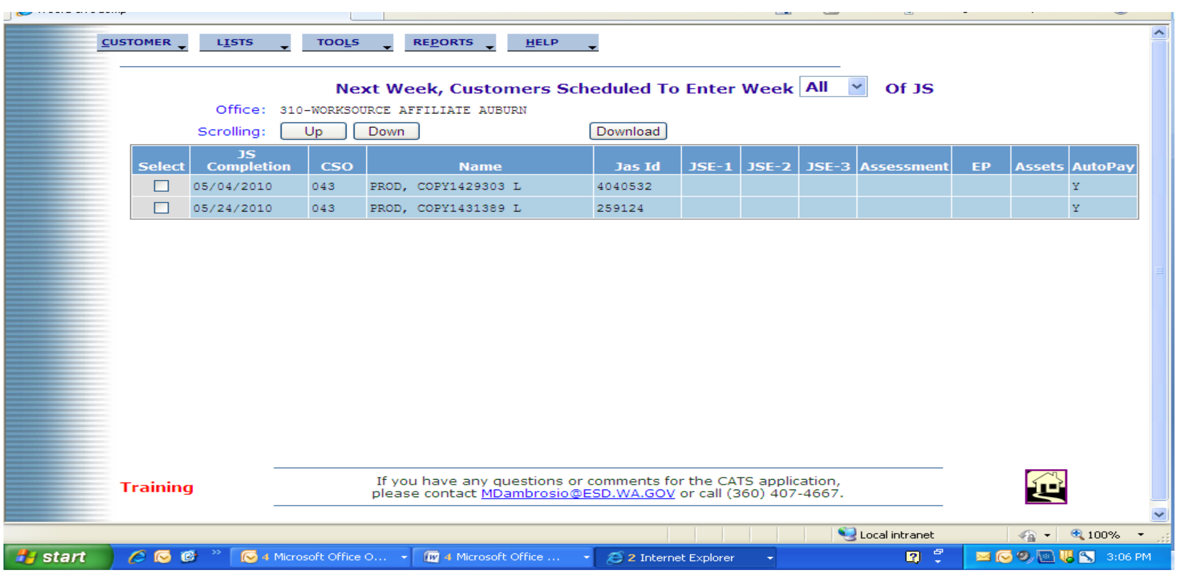
   - Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number
   - TANF Case Status

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.



1. Click on **Weeks Open JS** 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
   - JSE 1, 2 and 3 (no longer used)
   - Assessment
   - EP (no longer used)
   - Assets
   - 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.

5. Click on the **Select** box in front of the customer you want to review. This will display a pop-up menu. Same as on the Due In Today List.
6. 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) or click on **Save** (this will save the file to a disk).

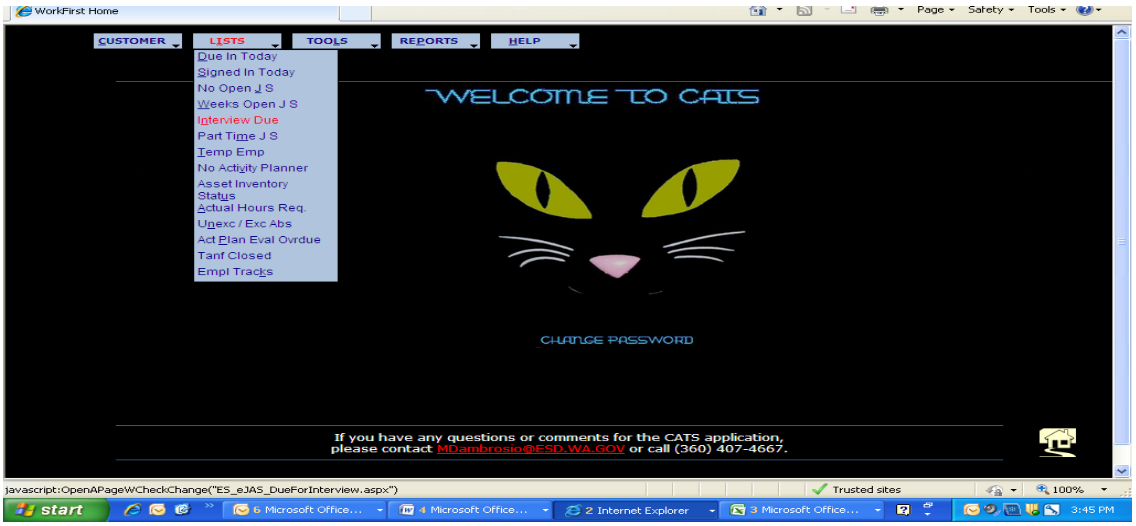
4. Choosing the **Save** option displays a Save As pop-up box asking where to save the information and what name to give the file. This will save the data as an Excel spreadsheet.

   For either option, the Excel spreadsheet will contain the following information:

   - JS Completion Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number
   - JSE 1, 2 and 3 (no longer used)
   - Assessment
   - Employment Plan (no longer used)
   - Assets
   - Auto Pay
   - TANF Status
   - CATS Status
   - Mailing Name
   - Mailing Address Line 1,2, and 3
   - City
   - State
   - Zip
   - Phone Number

Interview Due

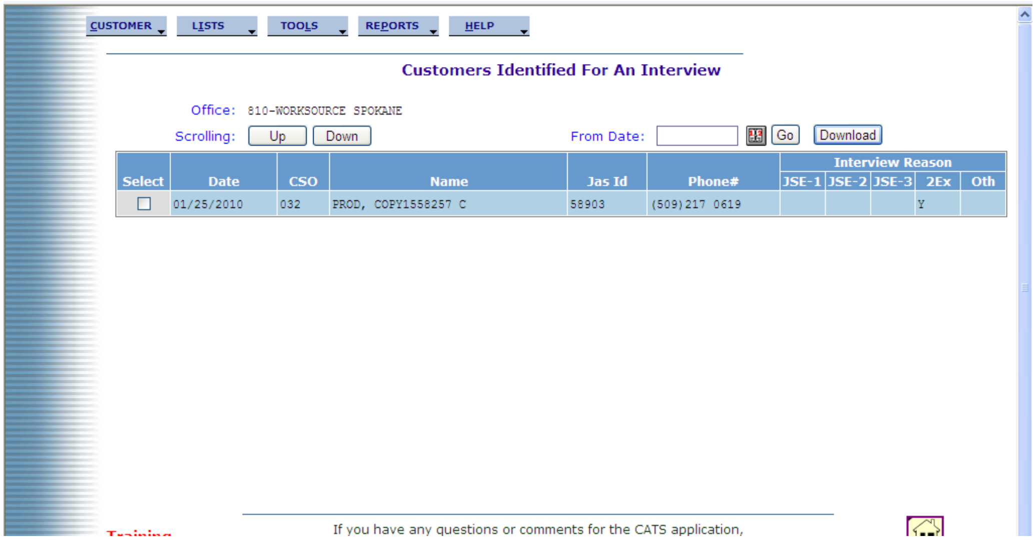
This provides a real time list of customers due for an interview or evaluation. Names are added to this list for three reasons: 1) customer has 2 excused absences, and 2) the customer identified as needing an 'Other Interview' by a staff member. This list displays a 'Y' indicator in the column for which 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.



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 or 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.

Customer Identified for an Interview Report



2. To locate a specific customer, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> 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.
2. To locate a specific Customer, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter the Interview Due 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 customer you want to review. A pop-up menu displays available screen options. The same as the Due In Today List.
4. 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

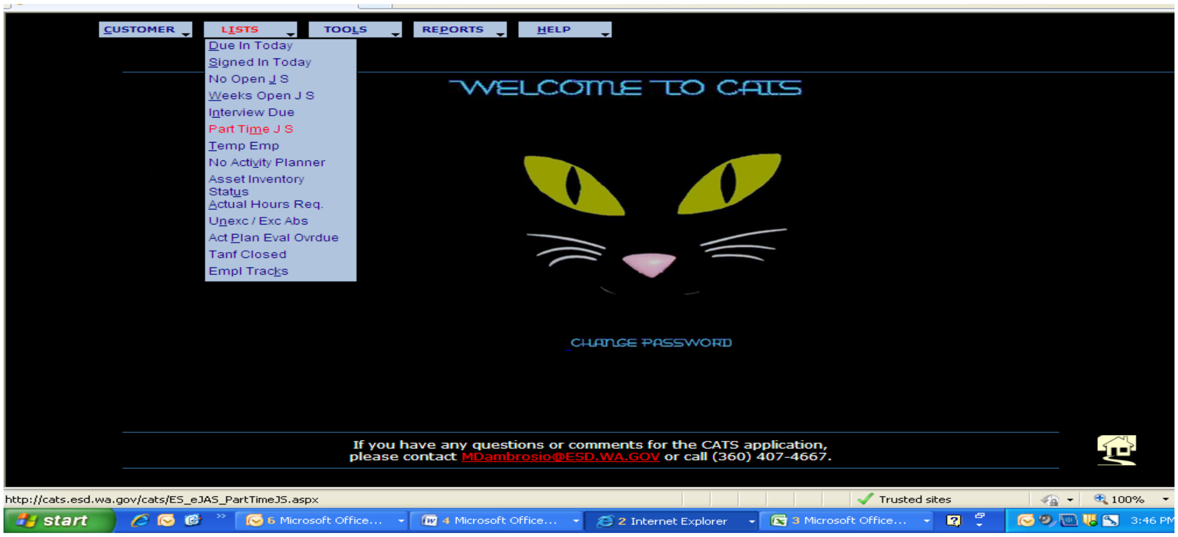
1. Click on **Interview Due** on the Lists tab. This will display a list of Customers.
2. Click on the **Download** button. A File Download pop-up box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) or click on **Save** (this will save the file to a 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 or 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.



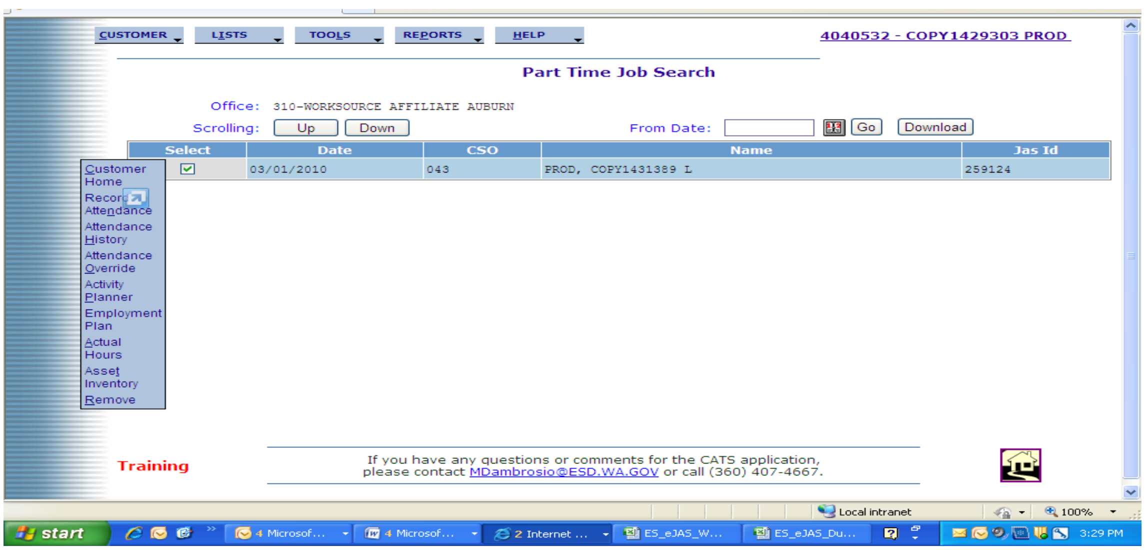
Part Time Job Search Report

Review Customer Information on the Part Time JS List

1. Click on **Part Time JS** on the List tab. This will display a list of customers with the following information:
   - Part Time JS 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 <u>or</u> enter the desired Part Time JS Start 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 customer you want to review. A pop-up menu displays available screen options. The same as on the Due In Today List plus:
   - **Remove** – removes the customer from the Part Time JS list.
4. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Part Time JS screen.

Remove a Customer from the Part Time JS List



1. Click on **Part Time JS** on the Lists tab. This will display a list of customers.
2. To locate a specific customer, use the **Up** or **Down** scroll buttons to navigate through the list <u>or</u> enter the Part Time JS Start 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 customer you want to review. A pop-up menu displays available screen options.
4. Click on **Remove** from the pop-up menu.

5. Click **OK** on the pop-up confirmation box to complete the action. The Customer's name has now been removed from the Part Time JS list.
6. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Part Time JS screen.

Download the Part Time JS List

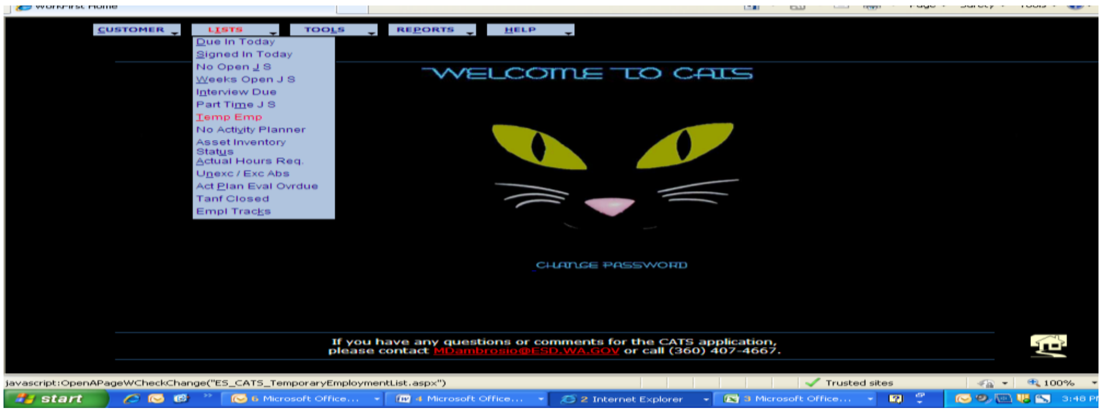
1. Click on **Part Time JS** on the Lists tab. This will display a list of customers.
2. Click on the **Download** button. A file download box will appear with two options.
3. Click either on **Open** (this will open up an Excel spreadsheet) <u>or</u> click on **Save** (this will save the file to a disk). 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:

   - Part Time JS Start Date
   - CSO
   - Last Name
   - First Name
   - JAS ID Number

Temporary Employment List

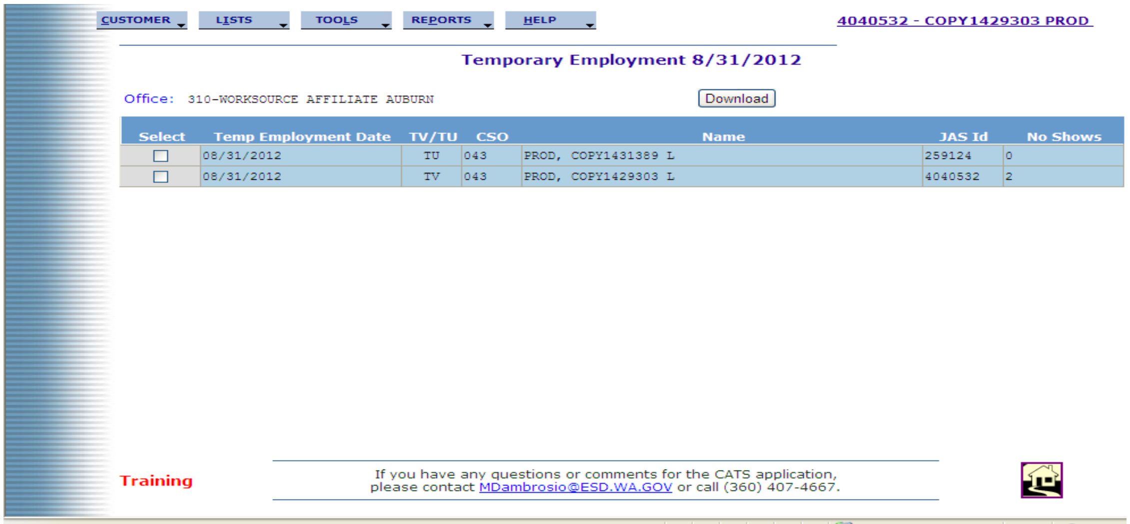
This is a read only list of customers, who have an excused absence for unverified temporary employment recorded in attendance history. Customers remain on the list for 120 days.



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

Temporary Employment Report



2. To locate a specific customer, use the **scroll bar** to navigate through the list.
3. Customers will remain on the list.

   Note: Review Customer Information on the Temporary Employment list the same as the Due In Today List.

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) 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.

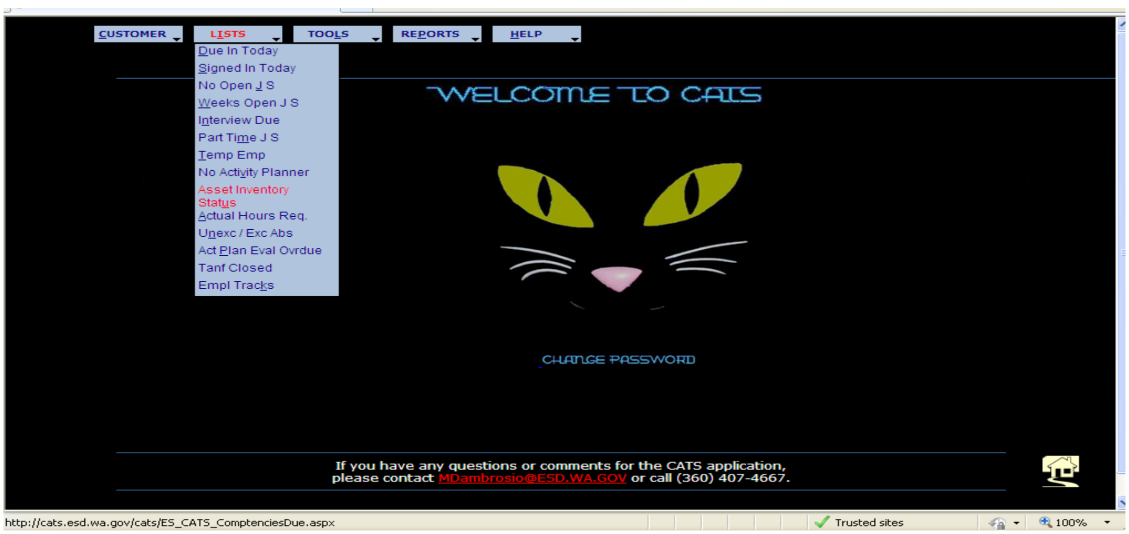
   For either option, the Excel spreadsheet will contain the following information:

   - Temporary Employment Date
   - TU/TV (type of temporary employment – Unverified or Verified)

- CSO
- Last Name
- First Name
- JAS ID Number
- No Shows

Asset Inventory Status

The list displays Assessment and Assets as either due or completed. This is a view only list, updated in real time when data boxes are checked from the Asset screen. Individual names stay on the list until the Assessment and all five (5) Assets are completed. Closing the JS component in eJAS also removes the customer's name from the list.



1. Click on **Asset Inventory Status** on the Lists tab. This displays a list of Customers with the following information:
   - JS Start Date
   - Assessment Due Date
     - The letter C (for Completed) is displayed in the Assessment Due box when the Completed Assessment box from the Asset screen is clicked on. Remember, clicking on the Completed Assessment box on the Asset screen, when a date already appears, will update the date to the present date.

  - The letter D (for Due) is displayed in the Assessment Due box when the completed Assessment box from the Asset screen was checked while under a prior JS component and the date from the Asset screen is less than 84 days old. Remember, clicking on the completed Assessment box on the Asset screen, when a date already appears, will update the date to the present date.

- CSO
- Full Name
- JAS ID Number
- Assets (5 Boxes App, Res, Int, Com, and LMR)
  - The letter D (for Due) will be displayed, or
  - The letter C (for Completed) will be displayed.

2. There are two ways to locate a specific Customer on this list. You can use the **Up** or **Down** scroll buttons to navigate through the list or you can filter the list by using the JS start date. To filter by the JS start date, enter a date in the box called JS Start Date and click on the **Go** button.

Review Customer Information from the Asset Inventory Status List – this is done in the same manner as the Due In Today List.

Download Assets Due List

1. Click on **Asset Inventory List** 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.

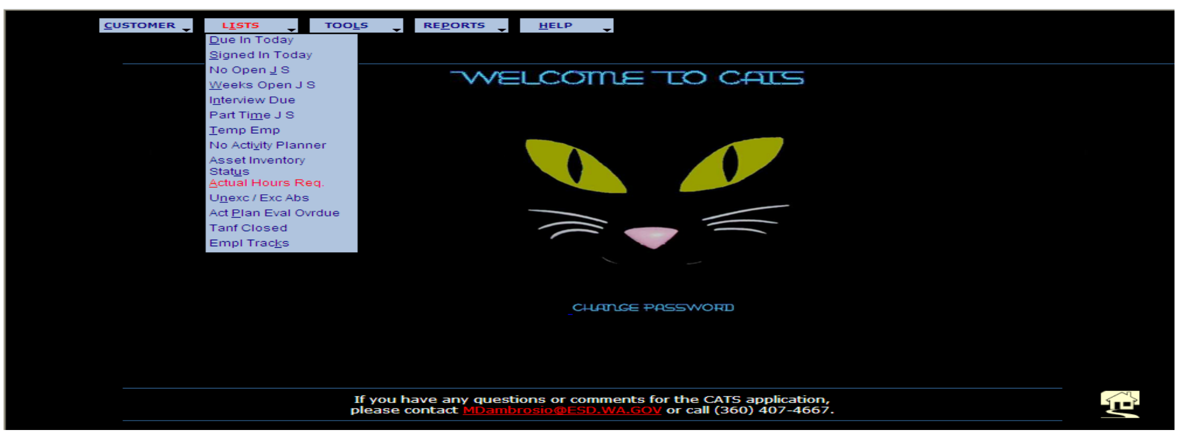
4.

For either option, the Excel spreadsheet will contain the following information:

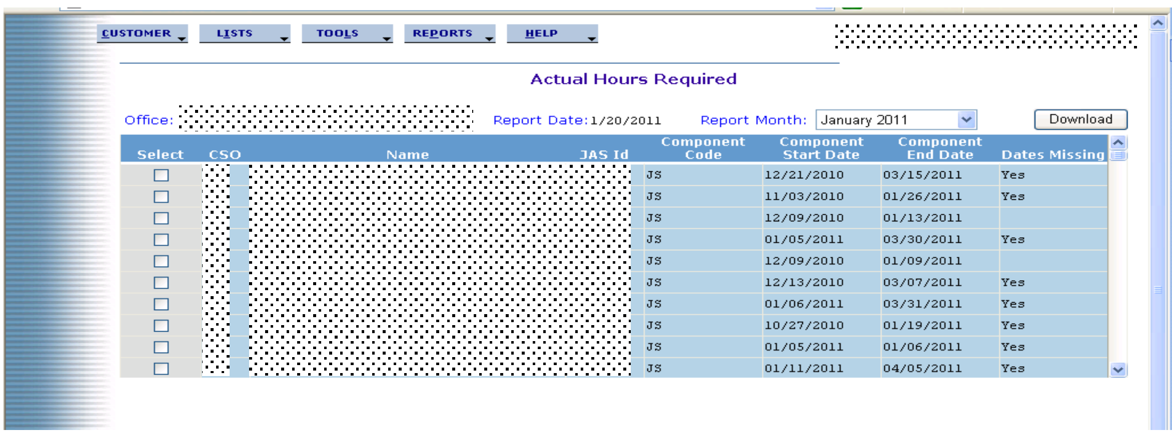
- JS Start Date
- CSO
- Full Name
- JAS ID Number
- Assessment
- App
- Res
- Int
- Com
- LMR

Actual Hours Required List

The actual hour required list is a list of customers for whom actual hours may need to be reported. The list also identifies which customers have been fully reported. The report provides information for the current month plus the two prior months. The report identifies those who do not have all the days in job search, in the month selected, accounted for on the Actual Hours Screen.



1. Click on **Actual Hours Required** on the Lists tab. This will display a list of customers with the following information:
   - CSO
   - Name
   - JAS ID
   - Component Code
   - Component Start Date
   - Component End Date
   - Dates Missing – if "Yes", this could mean hours are missing



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 from Actual Hours Required List

1. Click on **Actual Hours Required** 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. The same as the Due In Today List.
3. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Actual Hours screen.

Download the Actual Hours Required List

1. Click on **Actual Hours Required** 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.

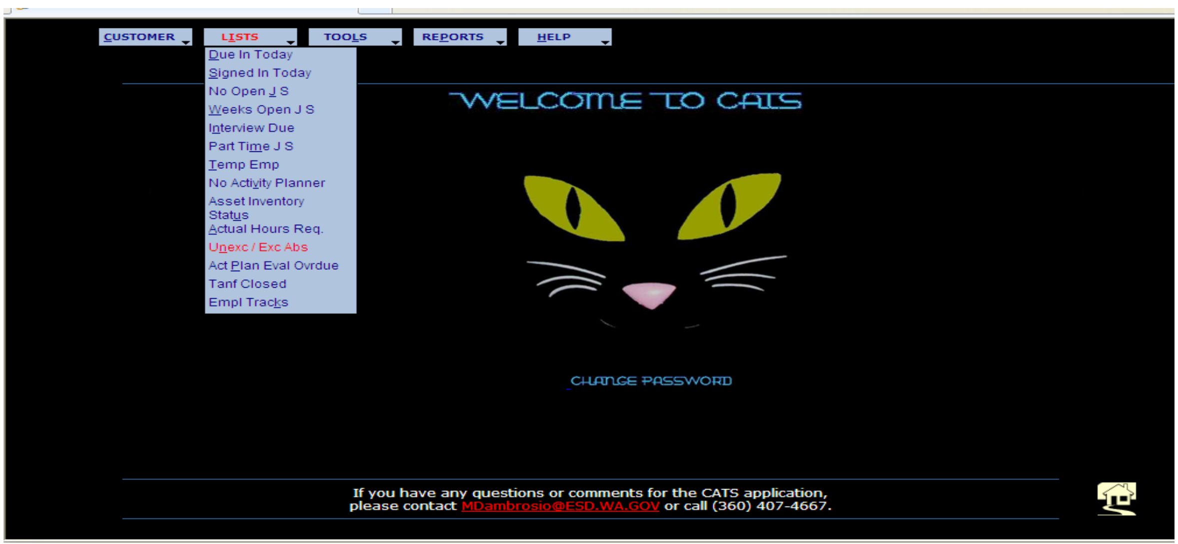
   For either option the Excel spreadsheet will contain the following information:

   - CSO
   - Last Name
   - First Name
   - JAS ID
   - Component Code
   - Component Start Date
   - Component End Date
   - Dates Missing
   - Report/ Month

Unexcused/Excused Absences List

This provides a real time list of customers with at least two no-shows (unexcused absences) or two excused absences accrued during the current month. ESD employment counselors are required by policy to notify case managers after the 2nd excused or unexcused absences and to document the outcome.

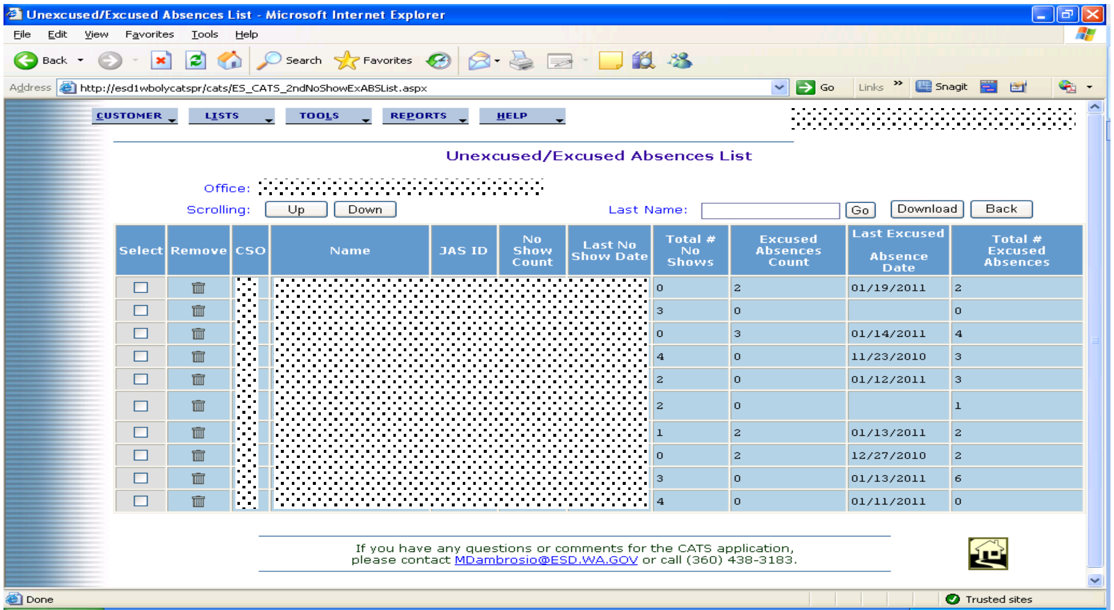
Clicking on the icon on the list will allow staff to remove a parent from the list and complete a note that will be sent to eJAS. The list will also have links to other CATS screens that can be updated or reviewed.



Review Unexcused/Excused Absences List

1. Click on **Unexc/Exc Abs** on the Lists tab. This will display a list of customers with the following information:
    - (remove icon)
    - CSO
    - Full Name
    - JAS ID
    - No Shows Count
    - Last No Show Date
    - Total # No Shows
    - Excused Absences Count
    - Last Excused Absences Date

-
- Total # Excused Absences



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 Unexcused/Excused Absences List

1. Click on **Unexcused Absences List** on the Lists tab. This will display a list of customers.
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.
3. Click on the **Select** box in front of the customer you want to review. A pop-up menu displays available screen options. The same as the Due In Today List.
4. Click on either the **Back** button or the **Cancel** button (depending on which screen you are on) to return to the Unexcused/Excused Absences list screen.

5.

Download Unexcused/Excused Absences List

1. Click on **Unexc/Exc Abs** 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:

   - CSO
   - Full Name
   - JAS ID
   - No Shows Count
   - Last No Show Date
   - Total # No Shows
   - Excused Absences Count
   - Last Excused Absences Date
   - Total # Excused Absences

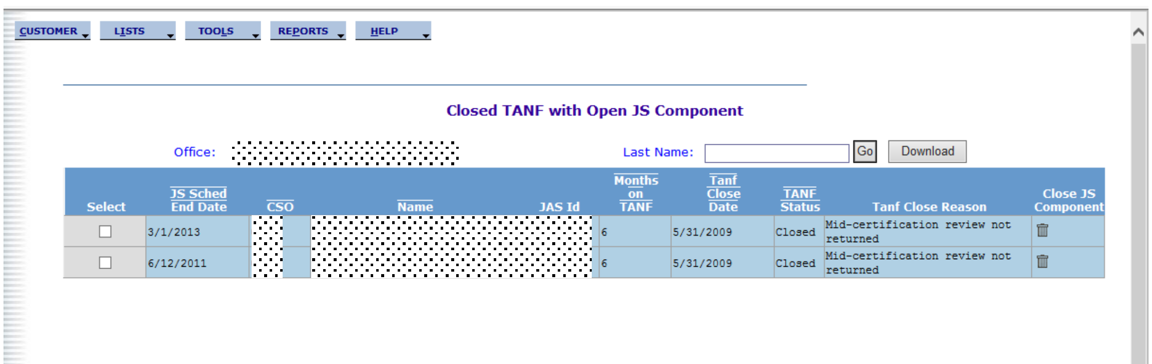
AP With Closed JS

This is no longer used. The Activity Planner was replaced with the Plan of Activities, which is not yet in the system.

TANF Closed

This provides a real time list of customers with a closed TANF case and an open JS Component.

Review TANF Closed List



Click on **TANF Closed** on the Lists tab. This will display a list of participants with the following information:

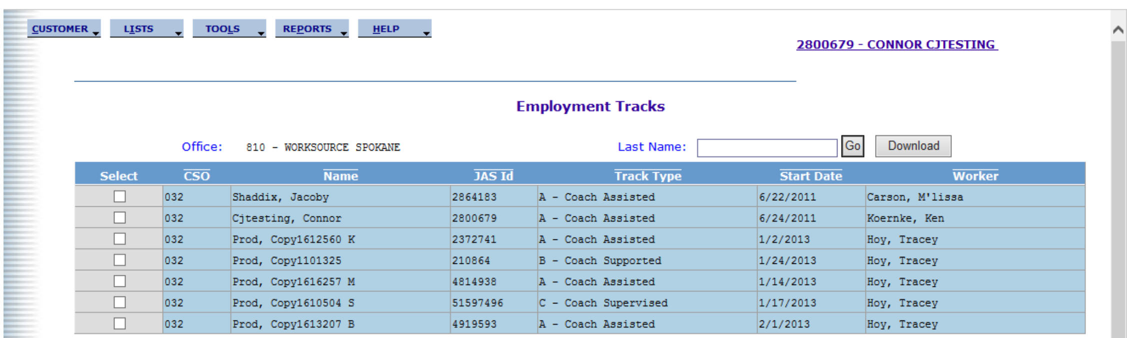
- JS Scheduled End Date
- CSO
- Name
- JAS ID
- Months on TANF
- TANF Closed Date
- TANF Status (Open or Closed)
- TANF Closed Reason
- (remove icon) Close JS Component

Clicking on the icon on the list will allow staff to remove a participant from the list, close the JS component and complete a note that will be sent to eJAS. If the JS is closed in eJAS, the participant will remain on the list until the icon is used to remove them from the list.

Employment Tracks

The employment track lists is a complete office list which identifies each participant place in one of the three employment tracks. Employment tracks identify how often the participant is expected at a minimum to meet with their coach. Initial placement into a track is done from the Customer tab.

- Track A – once every 28 days
- Track B – once every 14 days
- Track C – once every 7 days



Select	CSO	Name	JAS Id	Track Type	Start Date	Worker
	032	Shaddix, Jacoby	2864183	A - Coach Assisted	6/22/2011	Carson, M'lissa
	032	Cjtesting, Connor	2800679	A - Coach Assisted	6/24/2011	Koernke, Ken
	032	Prod, Copy1612560 K	2372741	A - Coach Assisted	1/2/2013	Hoy, Tracey
	032	Prod, Copy1101325	210864	B - Coach Supported	1/24/2013	Hoy, Tracey
	032	Prod, Copy1616257 M	4814938	A - Coach Assisted	1/14/2013	Hoy, Tracey
	032	Prod, Copy1610504 S	51597496	C - Coach Supervised	1/17/2013	Hoy, Tracey
	032	Prod, Copy1613207 B	4919593	A - Coach Assisted	2/1/2013	Hoy, Tracey

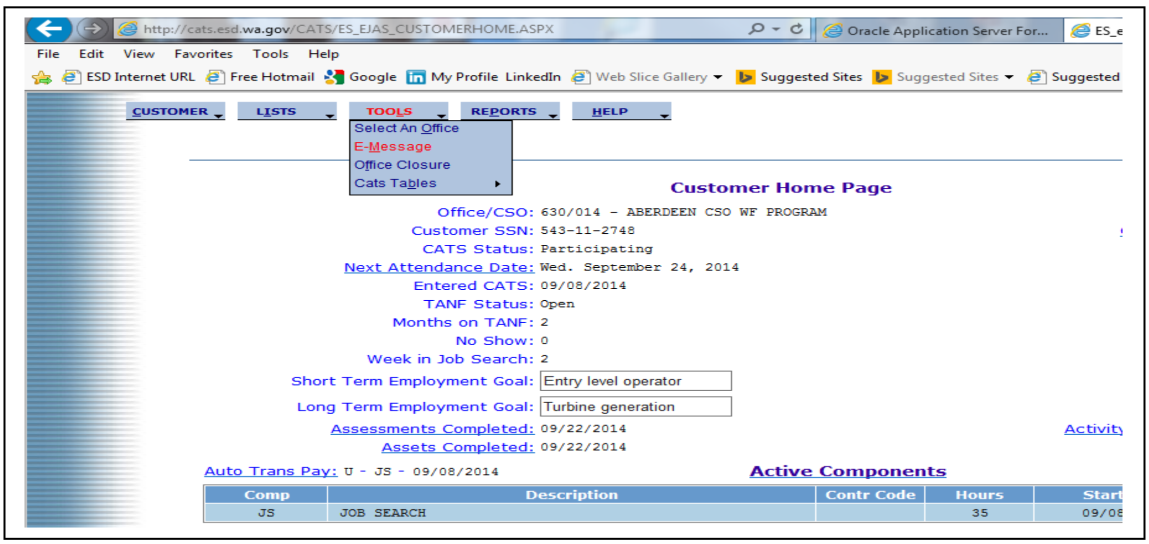
The list identifies:

- CSO
- Name
- JAS ID
- Track Type
- Start Date
- Worker

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 offices 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 or 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 or 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 or 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 or 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.

7.

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

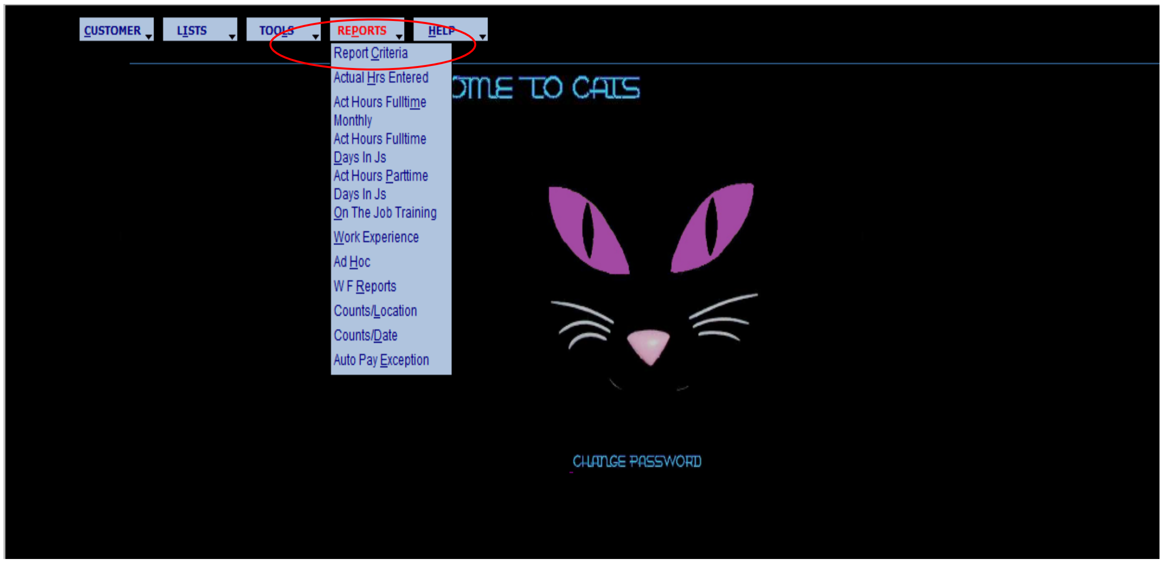
Review CATS Tables

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 that have chosen not to 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 <u>or</u> 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 four 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.

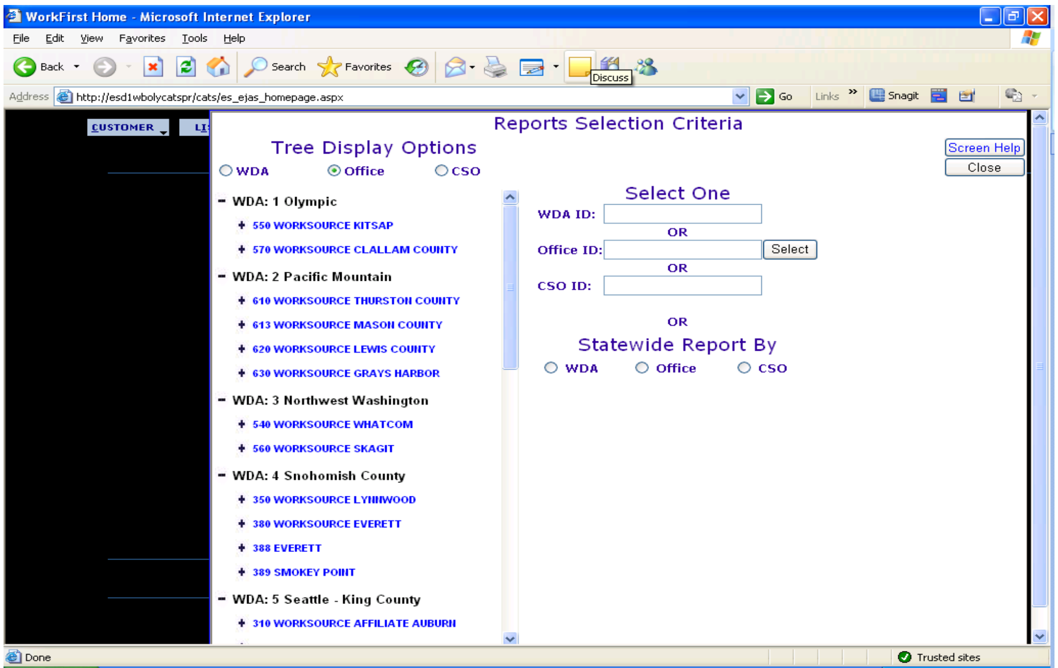
Using the tree view to select report level:

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.

Report Selection Criteria Screen



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 selection 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.

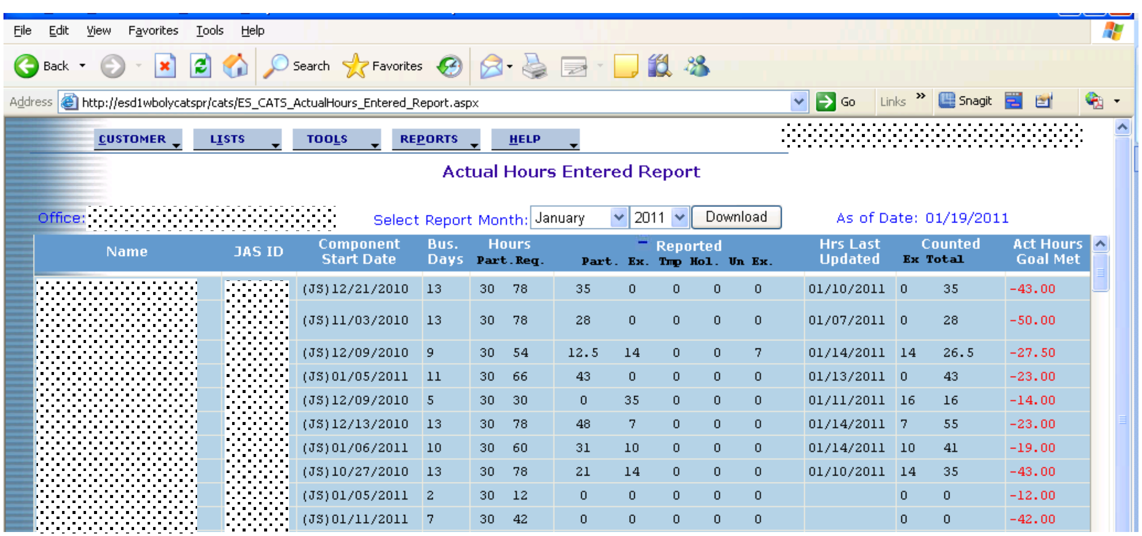
Actual Hours Entered by Office/CSO

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 identification number for the participant.

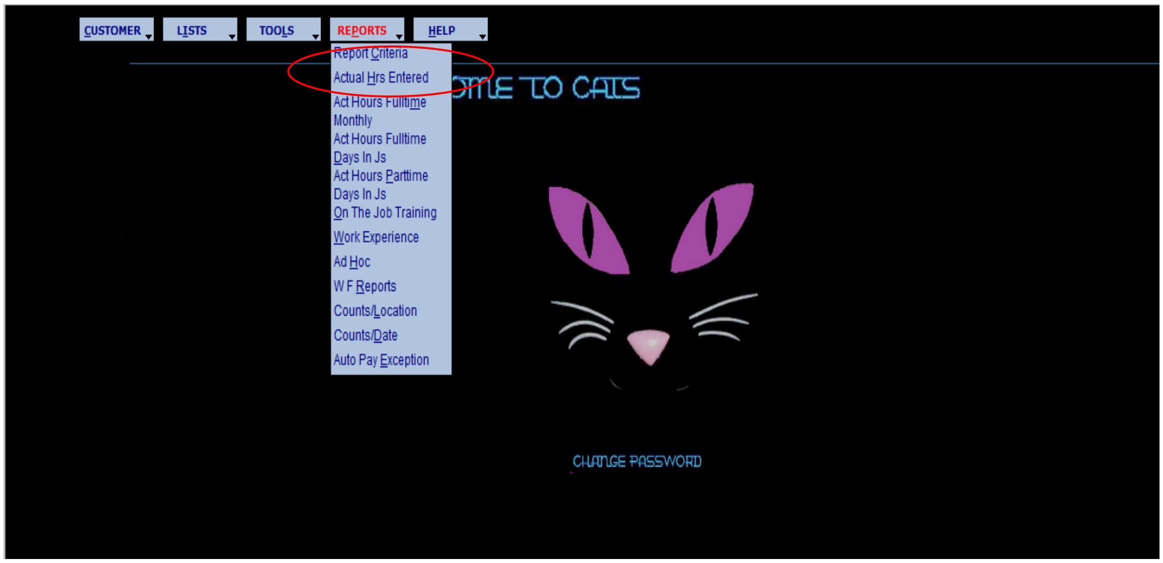
- **Component Start date** - Component start date and component code. Holding you mouse over the date will display the close date for the component displayed.
- **Business days** - number of business days since the start of the month the participant has been in the component. Business days are defined 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.

Example: Actual Hours Entered by Office/CSO

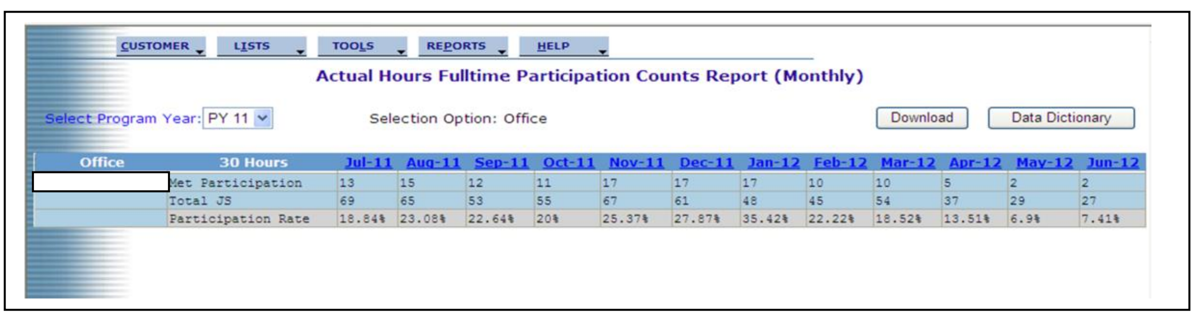


Name	JAS ID	Component Start Date	Bus. Days	Hours Part.	Hours Req.	- Reported Part.	Ex.	Tmp	Hol.	Un Ex.	Hrs Last Updated	Counted Ex	Counted Total	Act Hours Goal Met
		(JS)12/21/2010	13	30	78	35	0	0	0	0	01/10/2011	0	35	-43.00
		(JS)11/03/2010	13	30	78	28	0	0	0	0	01/07/2011	0	28	-50.00
		(JS)12/09/2010	9	30	54	12.5	14	0	0	7	01/14/2011	14	26.5	-27.50
		(JS)01/05/2011	11	30	66	43	0	0	0	0	01/13/2011	0	43	-23.00
		(JS)12/09/2010	5	30	30	0	35	0	0	0	01/11/2011	16	16	-14.00
		(JS)12/13/2010	13	30	78	48	7	0	0	0	01/14/2011	7	55	-23.00
		(JS)01/06/2011	10	30	60	31	10	0	0	0	01/14/2011	10	41	-19.00
		(JS)10/27/2010	13	30	78	21	14	0	0	0	01/10/2011	14	35	-43.00
		(JS)01/05/2011	2	30	12	0	0	0	0	0		0	0	-12.00
		(JS)01/11/2011	7	30	42	0	0	0	0	0		0	0	-42.00

Actual Hours Fulltime Monthly (30 hours):



1. Use the Report Criteria under the report tab to select the office or the CSO.
2. Click on **Act Hours Fulltime Monthly** on the Reports tab to display the Actual Hours Fulltime Monthly Report which constrains the following information
   - Office
   - Met Participation count
   - Total in JS
   - Participation Rate



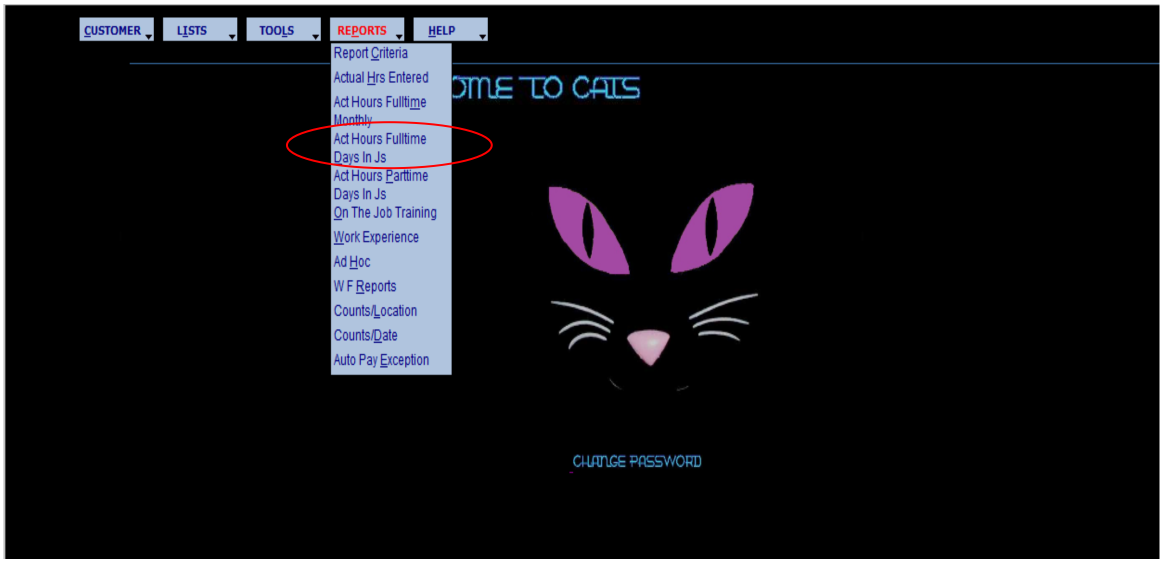
CUSTOMER LISTS TOOLS REPORTS HELP

Actual Hours Fulltime Participation Counts Report (Monthly)

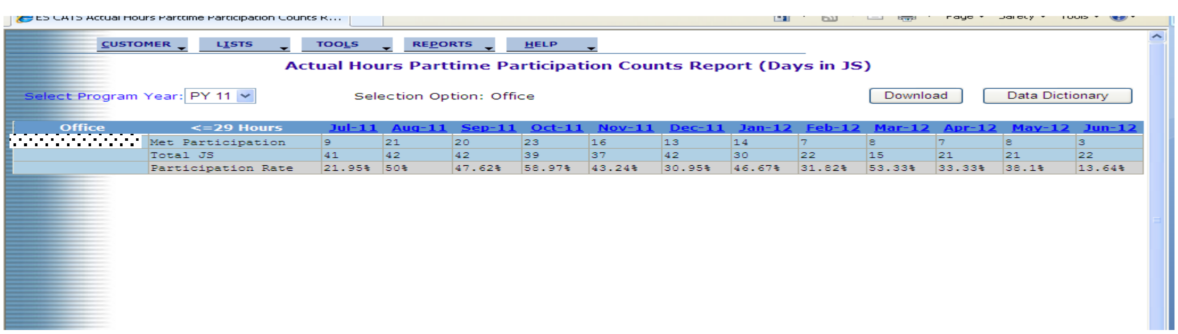
Select Program Year: PY 11 Selection Option: Office Download Data Dictionary

Office	30 Hours	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12
	Met Participation	13	15	12	11	17	17	17	10	10	5	2	2
	Total JS	69	65	53	55	67	61	48	45	54	37	29	27
	Participation Rate	18.84%	23.08%	22.64%	20%	25.37%	27.87%	35.42%	22.22%	18.52%	13.51%	6.9%	7.41%

Actual Hours Part time Monthly (29 hours or less):

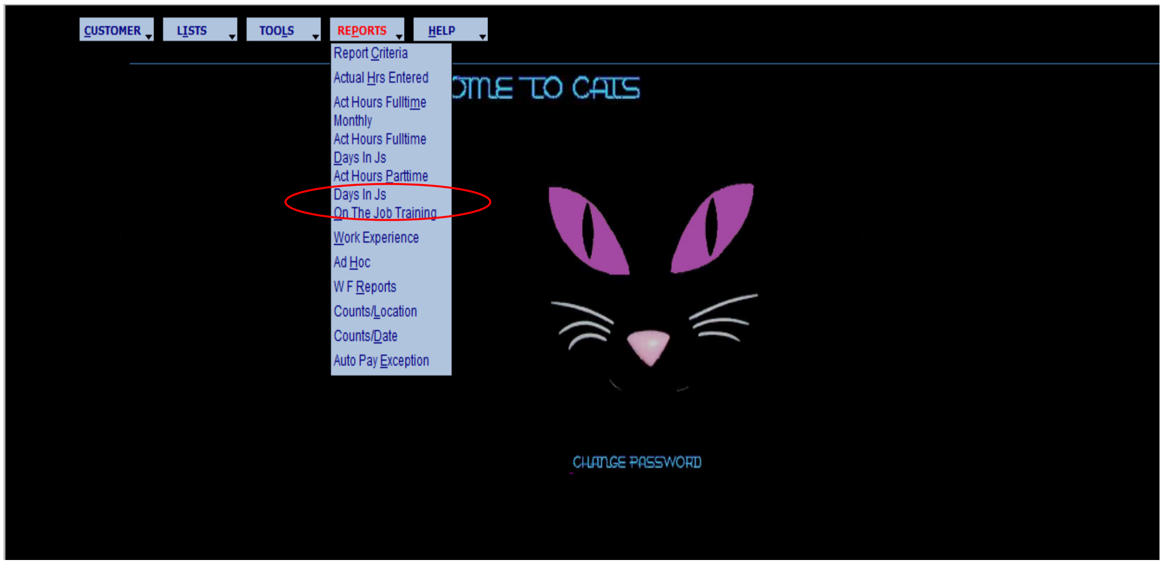


1. Use the Report Criteria under the report tab to select the office or the CSO.
2. Click on **Act Hours Parttime Days in JS** on the Reports tab to display the Actual Hours Part time Monthly Report which constrains the following information
    - Office
    - Met Participation count
    - Total in JS
    - Participation Rate



On the Job Training Participant Report

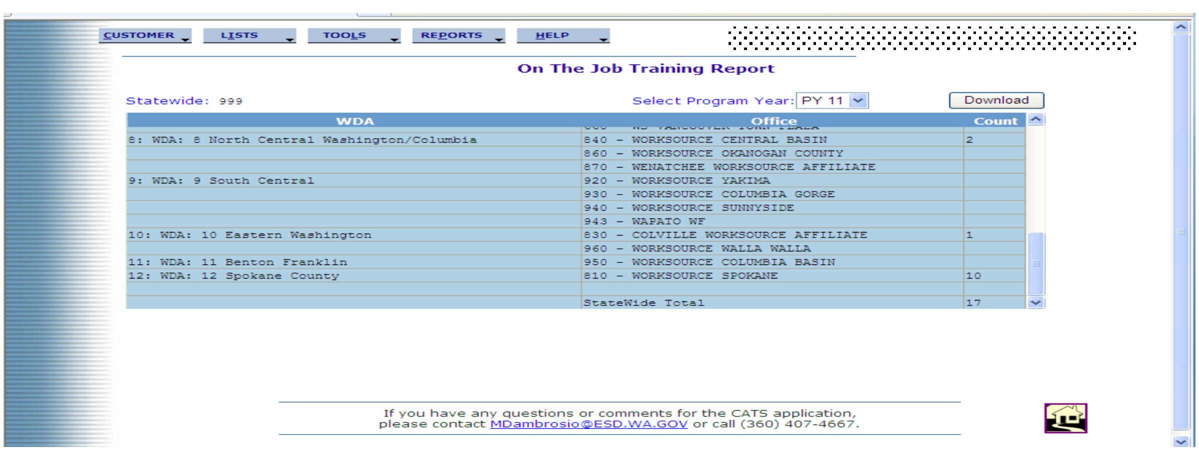
This is a read only report of customers who are in an ESD managed OT component for the time period selected.



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

Work Experience (WEX) Participants Report

This is a read only report of customers who are in an ESD-managed WEX 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

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** - Number 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 through 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** - Number 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.

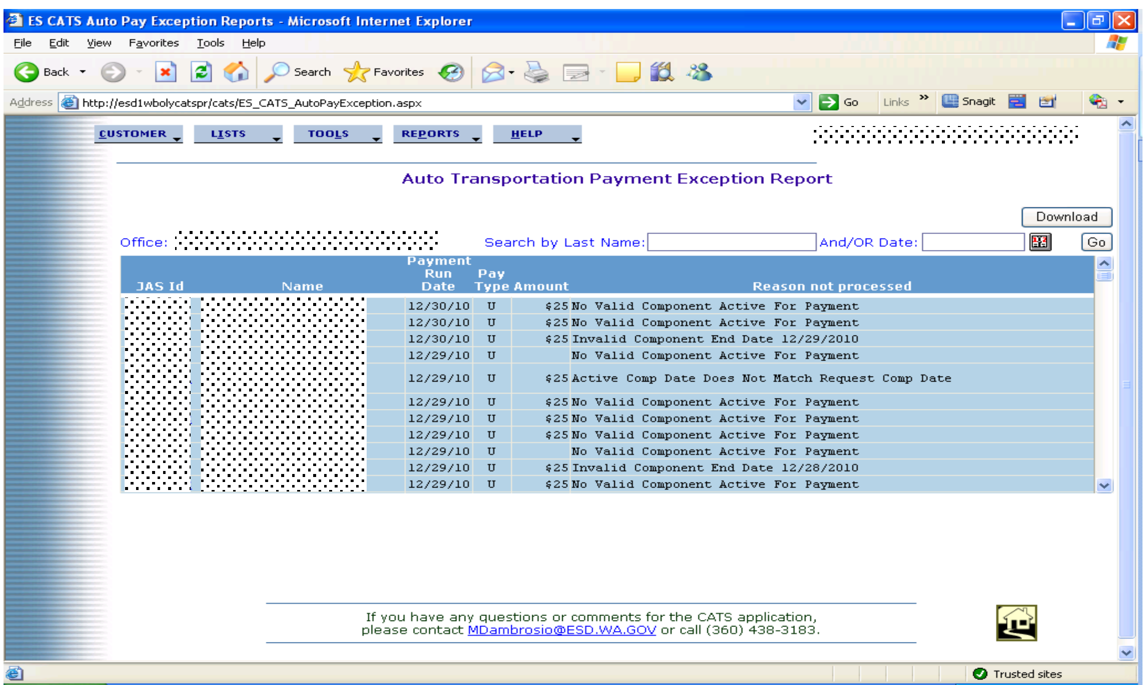
   For either option the Excel spreadsheet will contain the following information:

   - 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

Auto Transportation Payment Exception Report

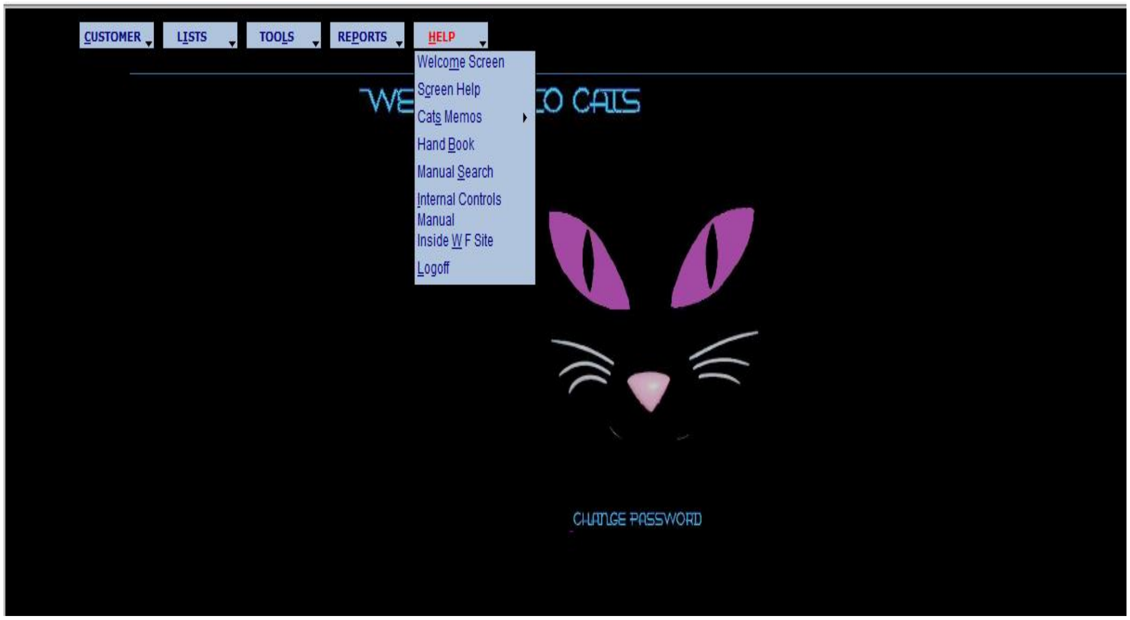
Use the Auto Transportation Payment Exception Report to display a list of customers for which the system did not process an auto payment for transportation. The report will display the reason for the non-payment.



Review the Auto Transportation Payment Exception Report

1. Click on **Report Criteria** on the Reports tab to display the Report Selection Criteria screen.
2.
3. To select **Office** enter in the 3 digit office **number** in the text box on the right side of the screen and click on the **select** button, or double click on the office name on the tree display.
4. To select **Statewide** click the office button under the 'Statewide Report By' on the right side of the screen.
5. Return to the report tab and click on **Auto Pay Exception.** This will display a list of customers with the following information:
    - Jas Id
    - Name
    - Payment Run Date
    - Pay Type
    - Reason Not Processed
6. To locate a specific **Customer** use the **scroll bar** to move up and down the screen or enter in the customer's last name in the search by **Last Name** text box. There is also the option to search by payment run date using the **And/Or Date** text box.
7. Clicking on the JAS ID number will display the Customer Home Page.

Help Menu



Welcome Screen – brings up the CATS welcome screen

Screen Help – provides online help to complete actions in CATS

Cats Memos – provides a listing of CATS Memos

Hand Book – provides a link to the WorkFirst Handbook

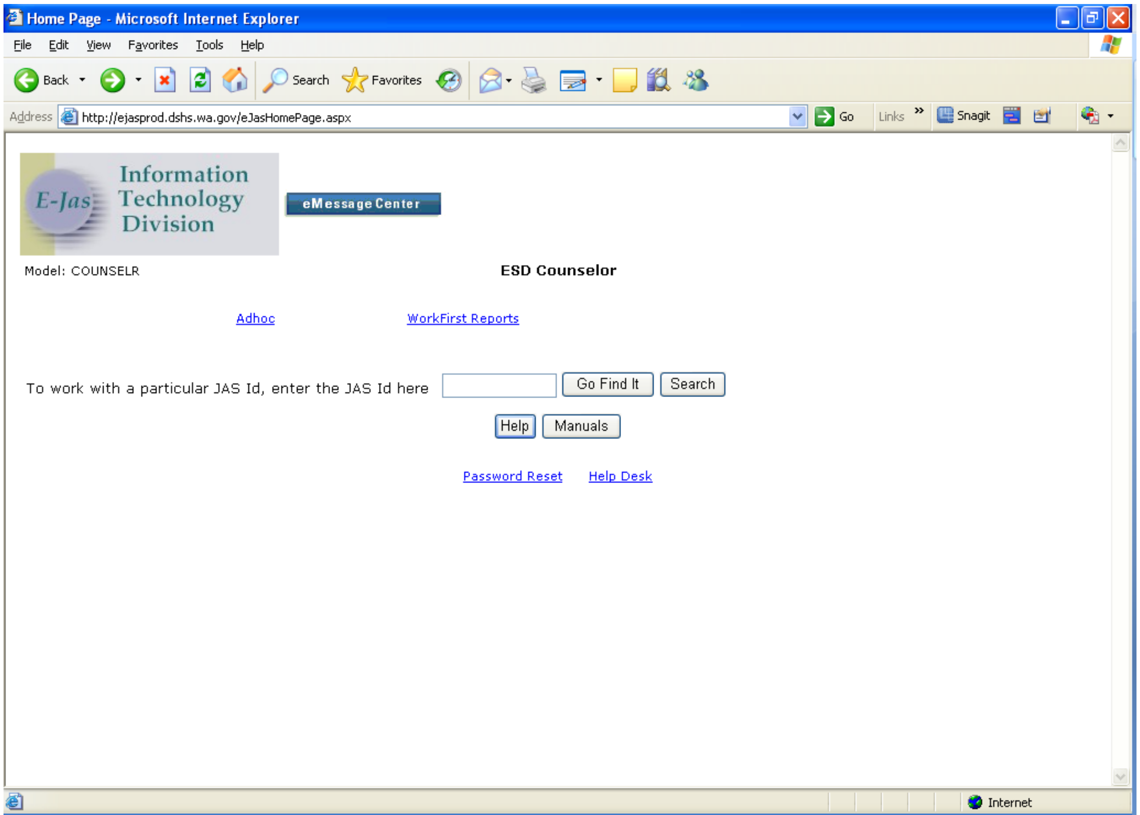
Manual Search – provides a link to Manual/Handbook Search in eJAS. Searches can be done manually by keywords.

Internal Controls Manual – links to ESD's Internal Control Manual for Support Services

Inside WF Site – links to ESD's Inside WorkFirst website

Logoff – clicking on this link will log you out of CATS

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).

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.

View 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

Client Demographics

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

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.

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.
4. Make changes as necessary and then click the **Update** button to save the changes.
5. Clicking the **Back** button returns the user to the Active Employment Screen without saving the information.
6. If the client is no longer working at this Employer/Worksite, users should update the following fields:
   - Termination Date
   - Termination Code
   - Effective Date

Return to the Main Menu or 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.

Notes

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.

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.

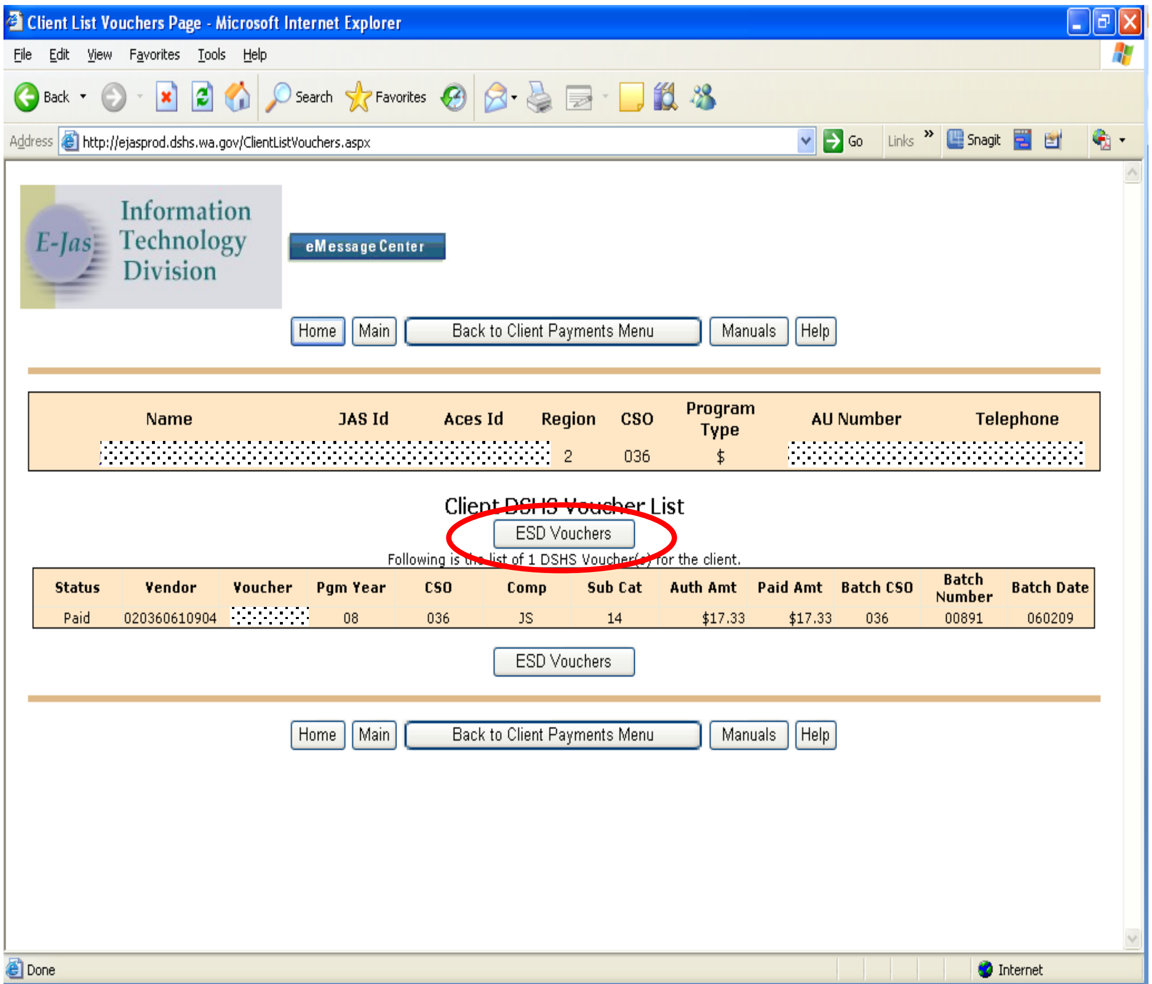
2. On the **JAS Notes** page:
   - Click the **Note/CE/Assessment Search** link and the **Note/CE/Assessment Search** page displays.
3. On the **Note/CE/Assessment Search** page:
   - Select at least one, or multiple **Primary Selection Options**.
   - Once a Primary Selection has been made **Secondary 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.

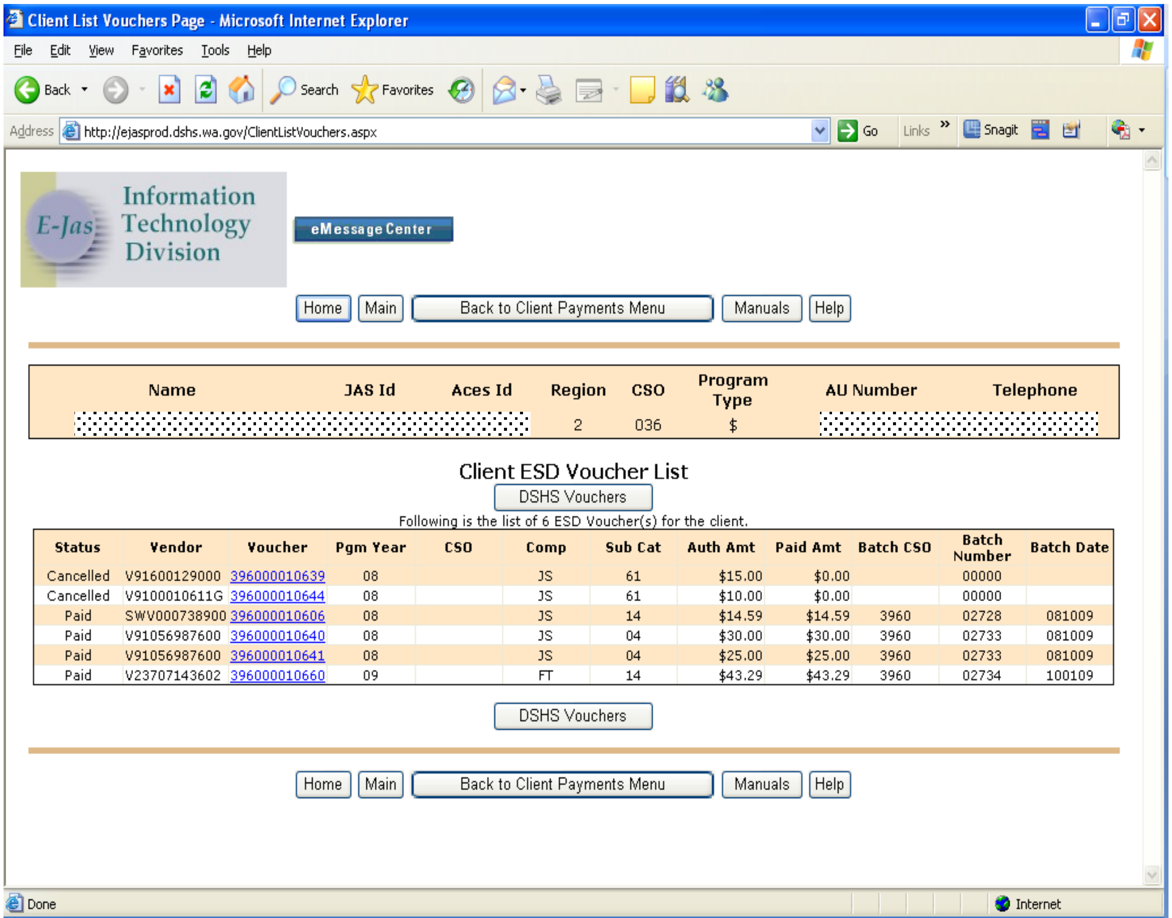
Payments

Client Voucher Review

View vouchers issue to participant by DSHS and ESD.



Client ESD Voucher List



Name	JAS Id	Aces Id	Region	CSO	Program Type	AU Number	Telephone
[redacted]			2	036	$	[redacted]	

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

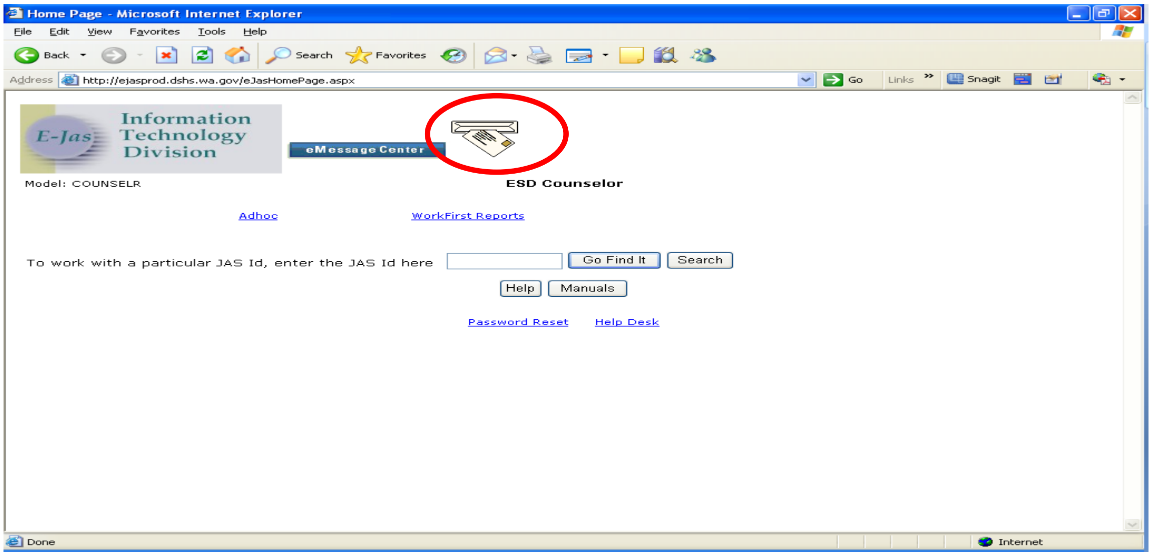
Done Internet

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.

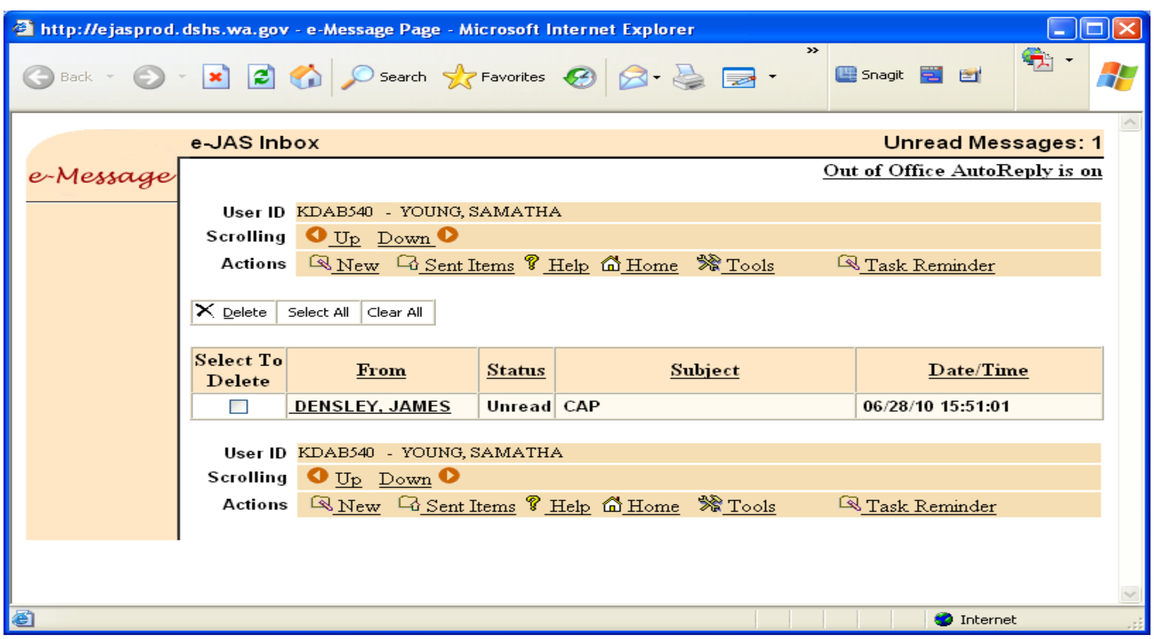
You must review both DSHS and ESD Vouchers to determine the total dollar amount spent for each participant.

Messages

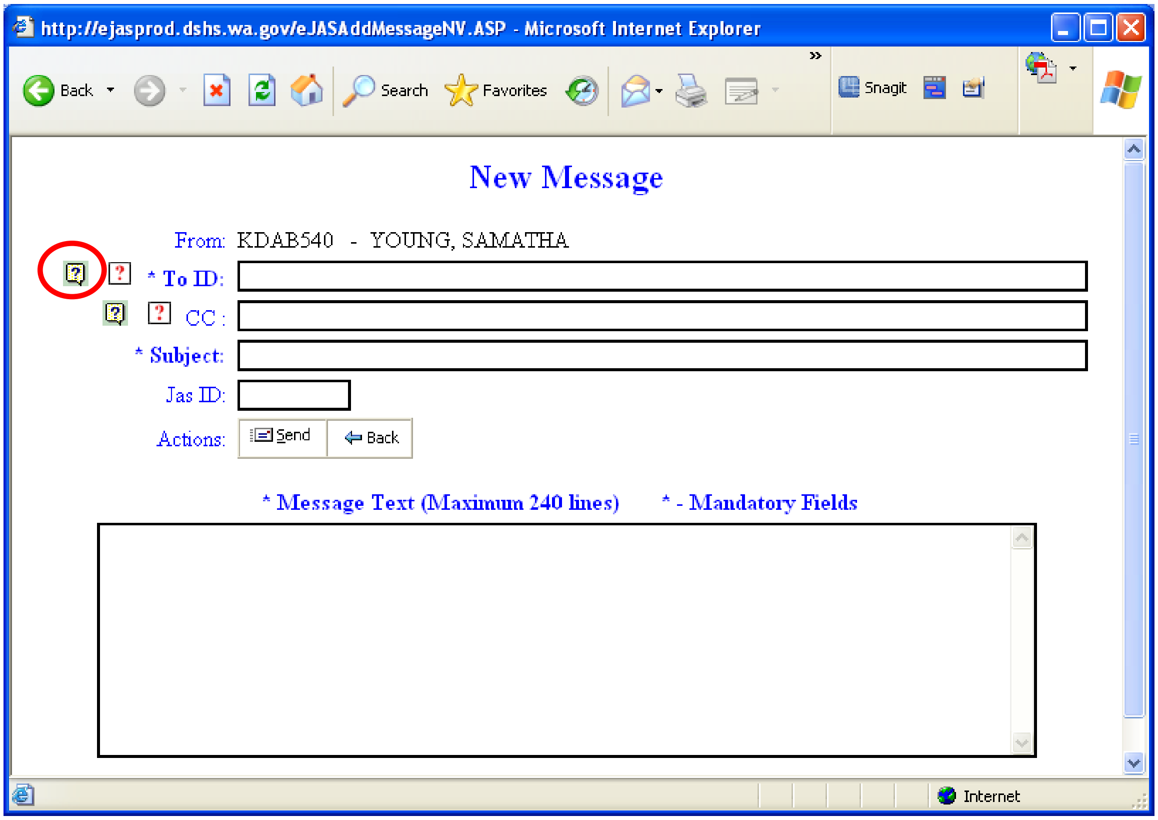
When an envelope appears next to the eMessage Center, you have messages. To view or send messages, click the **envelope**.



Sending a message using the Action Bar



1. Click **New**



2. To find the ID #, click 
3. Type in the Subject, Jas ID and in the Message Text, type the message.
4. When finished, click on **Send**

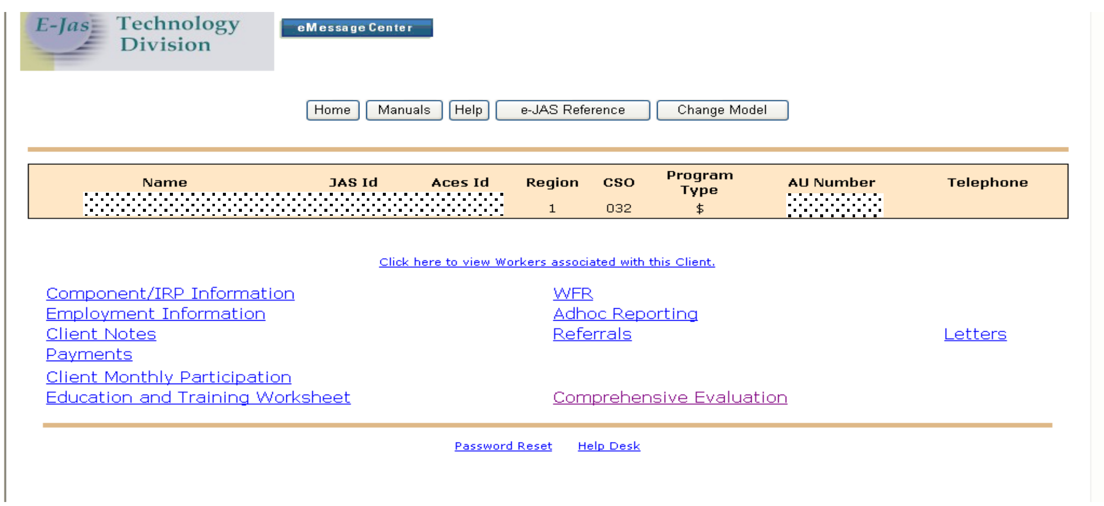
Comprehensive Evaluation (CE)

The CE is an automated tool for WorkFirst Program Specialists or WorkFirst Social Service Specialists to learn more about an individual's strengths, readiness and ability to succeed in the work place. There are a series of evaluations designed to help parents achieve better and quicker engagement in employment-related activities that lead to self-sufficiency.

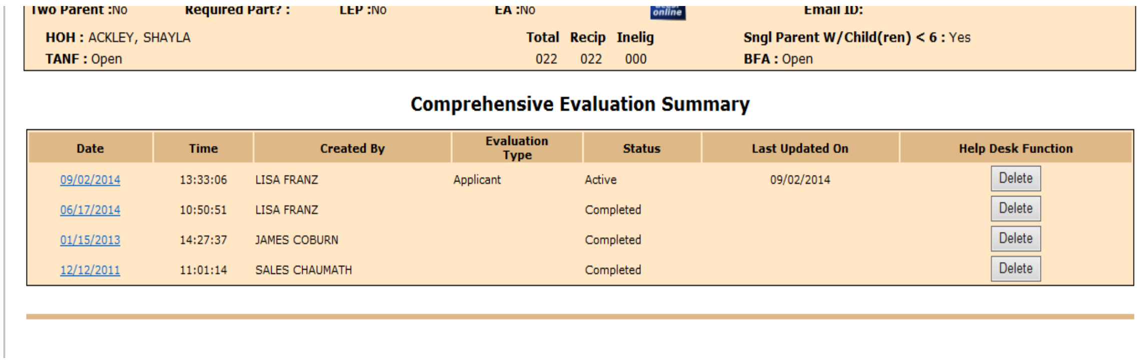
The CE is the key tool in leading parents directly to employment since job search continues to be the most appropriate pathway for the majority of parents. For other parents, the CE leads to employment through training or employment programs and also identifies areas in which the parent may need additional support. In some instances, parents receive services to help resolve issues while participating in work related activities.

Access the CE

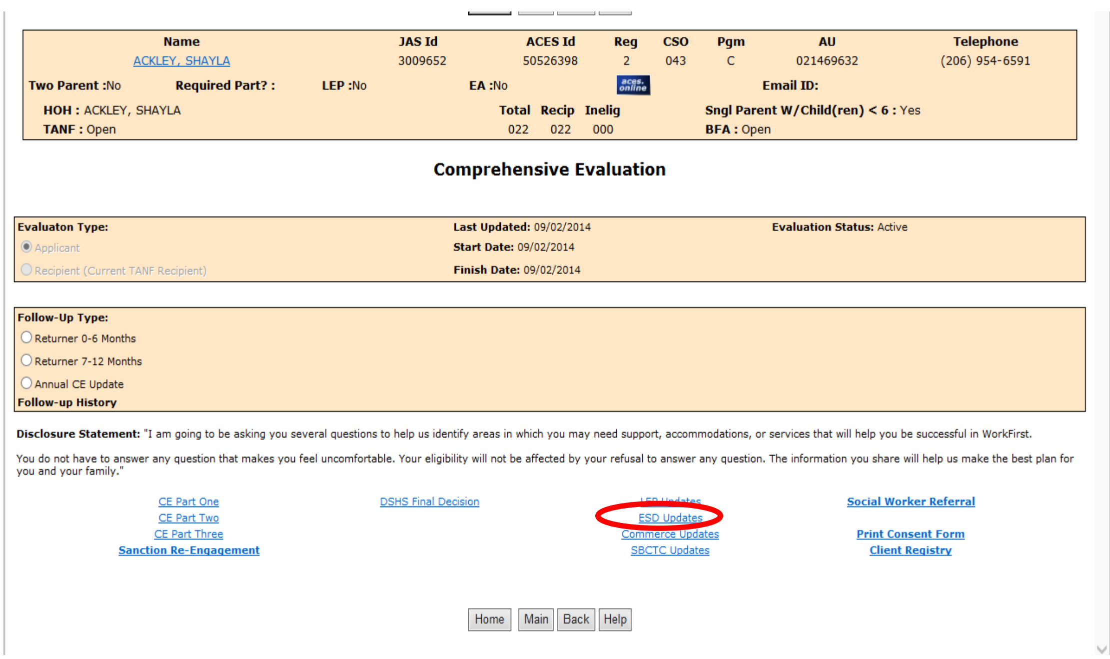
You can access the Comprehensive Evaluation (CE) through CATS or directly from eJAS. From the eJAS home page, select "Comprehensive Evaluation."



From the Comprehensive Evaluation Summary Page, click on the highlighted **Date** for the CE you want to review or complete.



In the CE section, scroll down to the bottom of the page and select **ESD Update**.



The ESD Partner Updates consists of three sections.

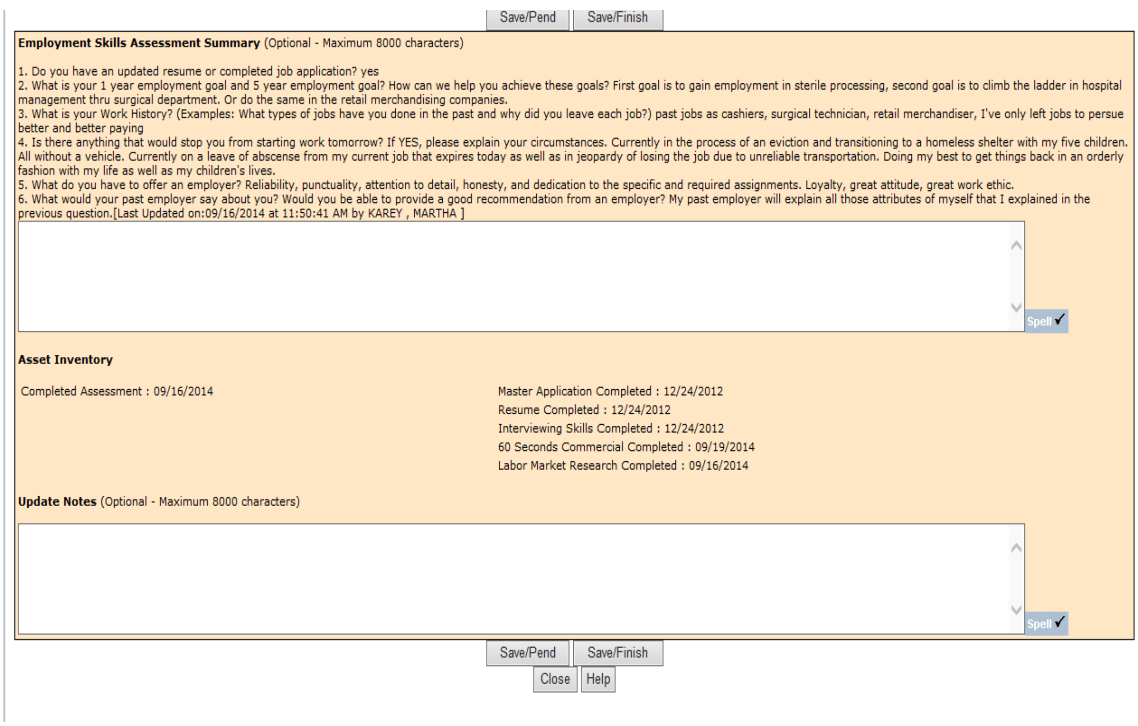
1. **Employment Skills Assessment Summary**. Staff will enter the Employment Skills Assessment (ESA) they complete with the participant. When the ESA is complete it can be copy and pasted directly into the "Employment Skills Assessment Summary. Future updates may be completed in this section as appropriate.
2. **Asset Inventory**. Dates Completed for the Asset Inventory section will prefill from the dates entered in CATS on the Asset Inventory screen. It is imperative the Asset Inventory screen in CATS reflect the most current dates completed. Any date changes in CATS will be reflected in the CE Asset Inventory Section of the CE. If no date is entered in CATS the applicable date will remain blank in the Asset Inventory Section of the CE.
3. **Update Notes**. This section may be used at any time to provide updated information regarding the participant's Employment Skills Assessment or other information pertinent to their success in Job Search.

Save Pend – Save Finish Functions.

- Save Pend may be used if the entry being made is not complete and you wish to return later to complete it.
- Save Finish is used to save the entry. Once Save Finish is selected changes may no longer be made to the entry.

Note: No changes may be made once the CE is saved. It is important the entry being made be double checked to ensure it is correct and being entered for the correct participant. If an error is made an updated entry will need to be made to correct the entry.

Below is an example of a complete ESD Update.


Save/Pend Save/Finish

Employment Skills Assessment Summary (Optional - Maximum 8000 characters)

1. Do you have an updated resume or completed job application? yes
2. What is your 1 year employment goal and 5 year employment goal? How can we help you achieve these goals? First goal is to gain employment in sterile processing, second goal is to climb the ladder in hospital management thru surgical department. Or do the same in the retail merchandising companies.
3. What is your Work History? (Examples: What types of jobs have you done in the past and why did you leave each job?) past jobs as cashiers, surgical technician, retail merchandiser, I've only left jobs to persue better and better paying
4. Is there anything that would stop you from starting work tomorrow? If YES, please explain your circumstances. Currently in the process of an eviction and transitioning to a homeless shelter with my five children. All without a vehicle. Currently on a leave of abscense from my current job that expires today as well as in jeopardy of losing the job due to unreliable transportation. Doing my best to get things back in an orderly fashion with my life as well as my children's lives.
5. What do you have to offer an employer? Reliability, punctuality, attention to detail, honesty, and dedication to the specific and required assignments. Loyalty, great attitude, great work ethic.
6. What would your past employer say about you? Would you be able to provide a good recommendation from an employer? My past employer will explain all those attributes of myself that I explained in the previous question.[Last Updated on:09/16/2014 at 11:50:41 AM by KAREY , MARTHA]

Spell ✓

Asset Inventory

Completed Assessment : 09/16/2014

Master Application Completed : 12/24/2012
Resume Completed : 12/24/2012
Interviewing Skills Completed : 12/24/2012
60 Seconds Commercial Completed : 09/19/2014
Labor Market Research Completed : 09/16/2014

Update Notes (Optional - Maximum 8000 characters)

Spell ✓

Save/Pend Save/Finish
Close Help

Examples of when to enter 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.

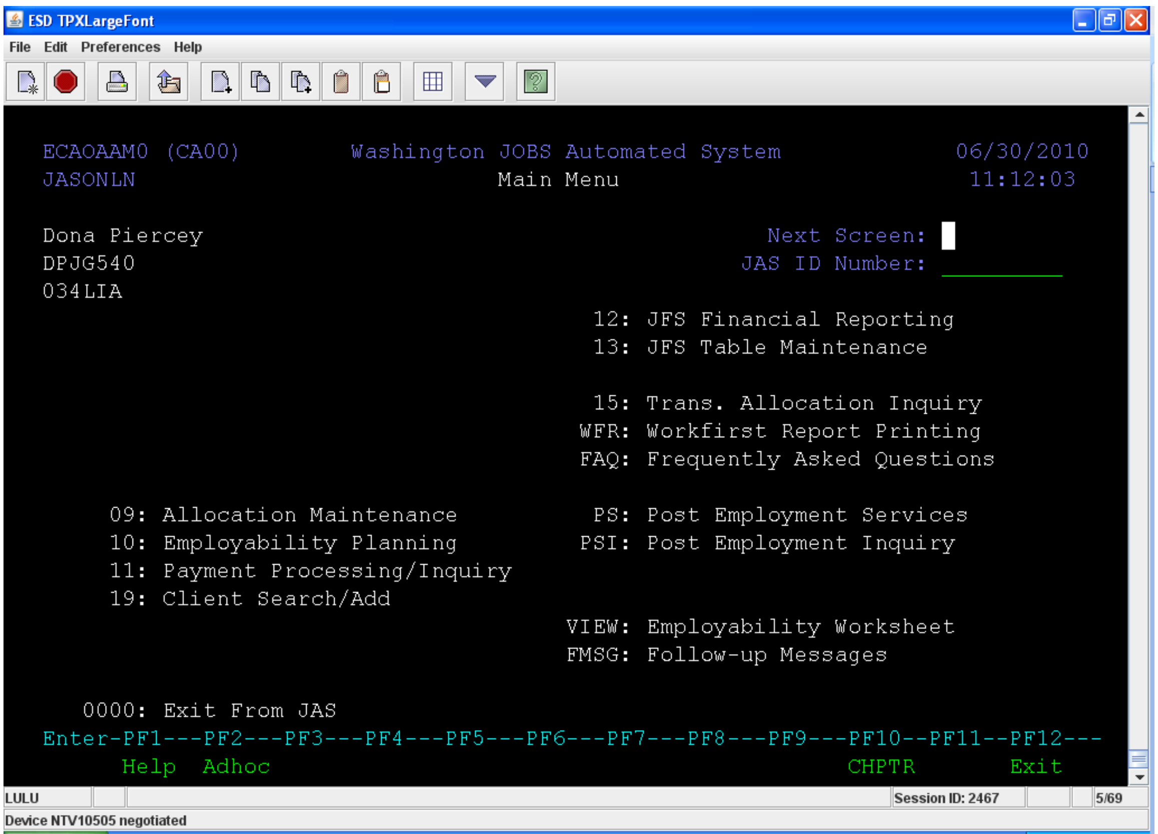
Using Automated Systems

- 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)

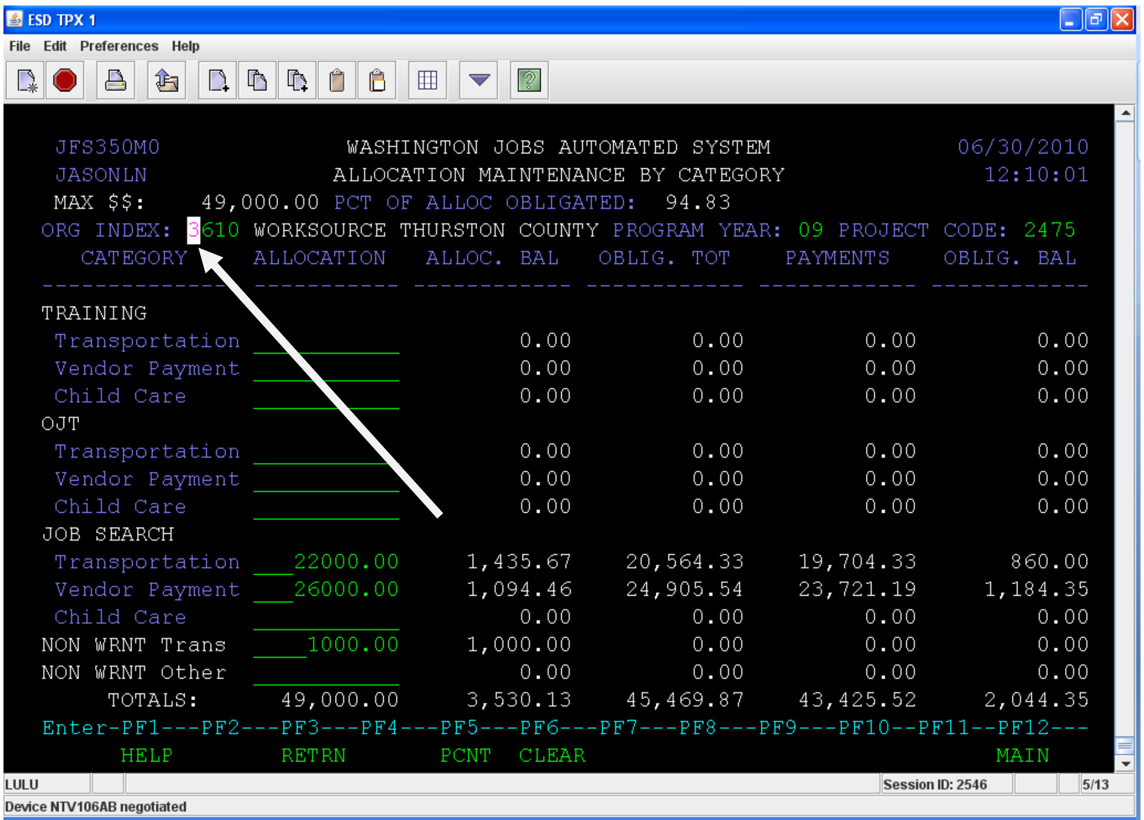
Use this section as a companion to the Internal Controls Manual (page 108, section 7). This section provides more detail.

Main Menu Screen



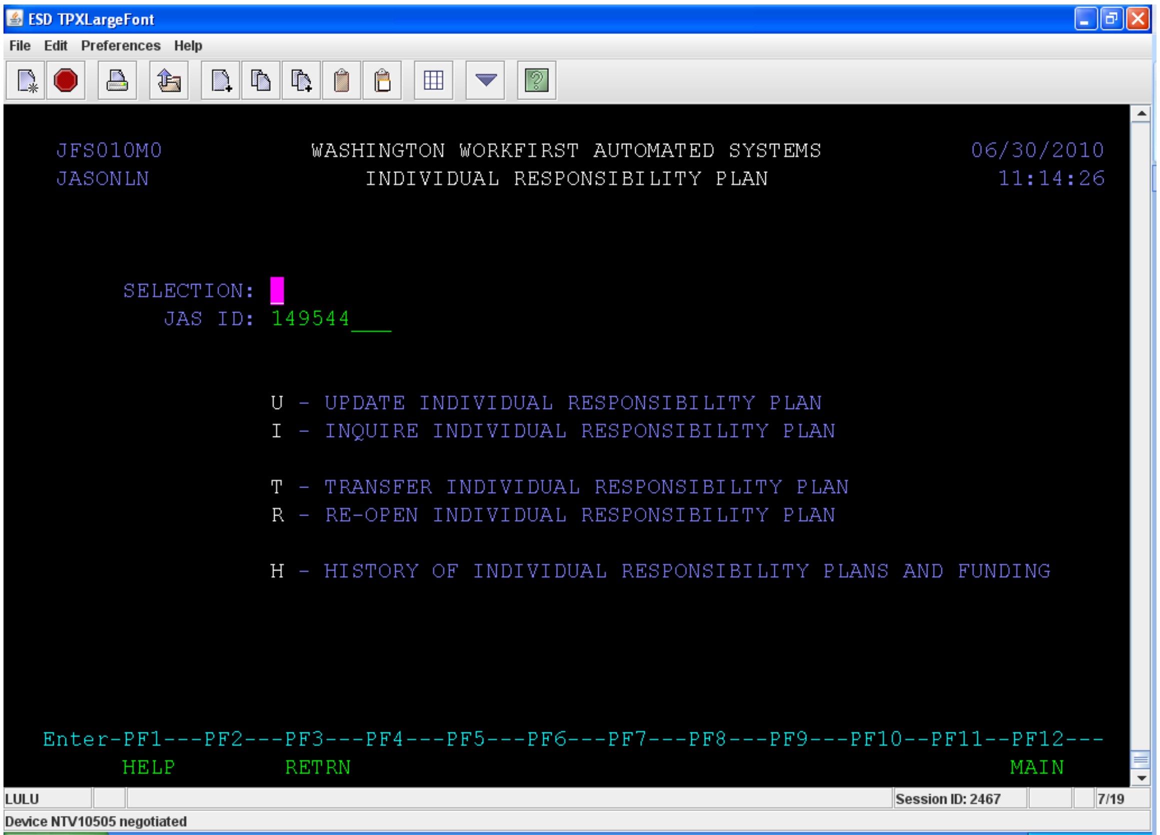
09 Screen: Allocation Maintenance

Use the 09 screen to see where WorkFirst Support Service money is allocated. WorkFirst Administrators, Supervisors staff are the only 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

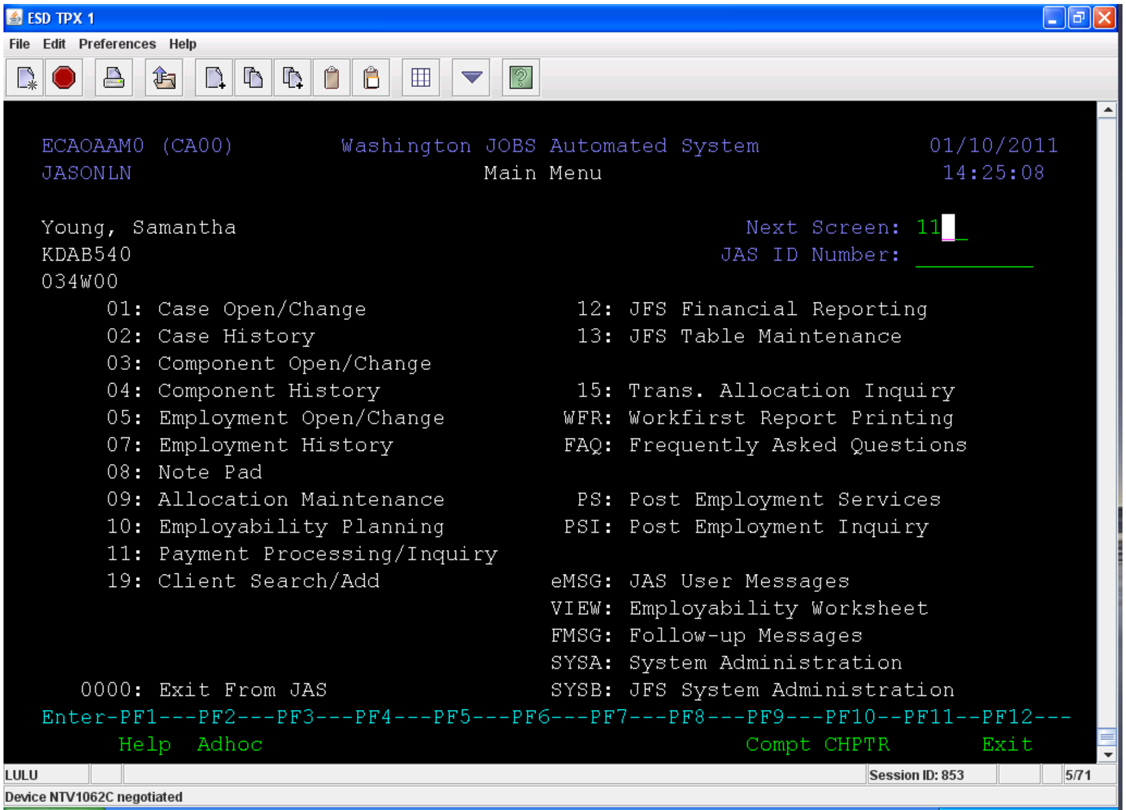
10 Screen – Employability Planning



Creating 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

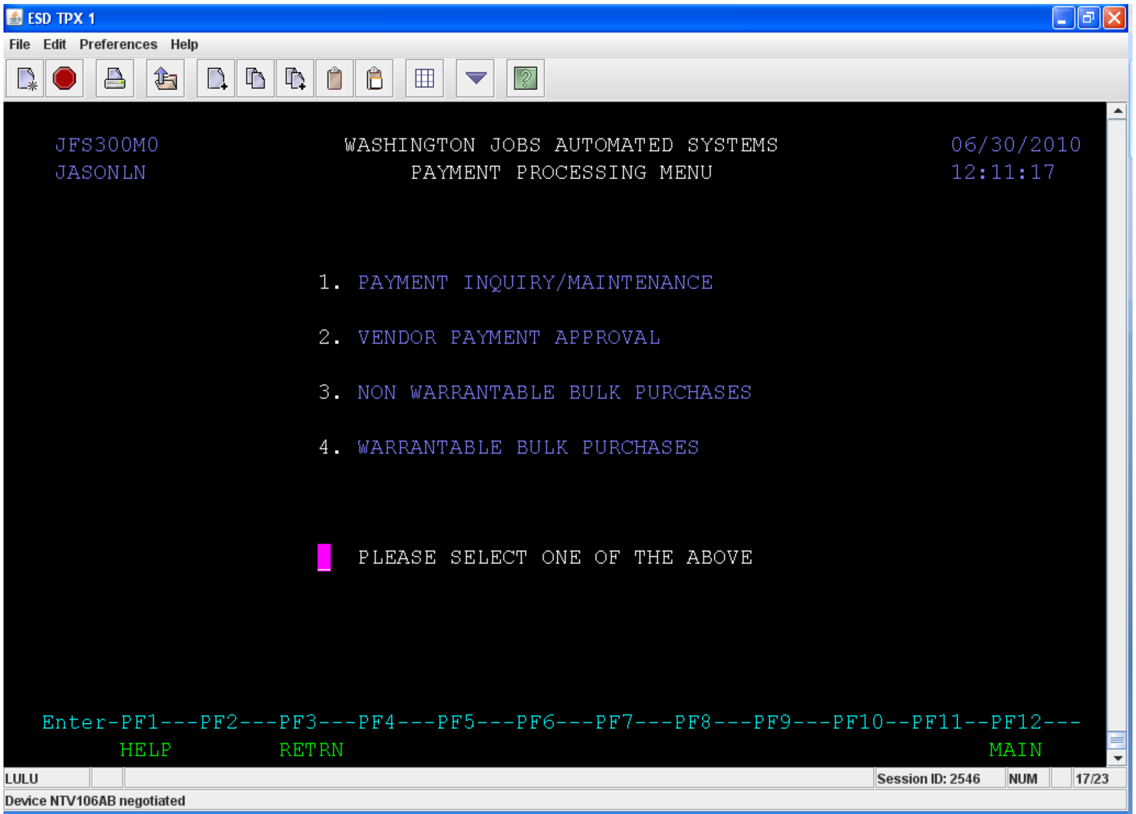
From the Main Menu:



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

Press Enter

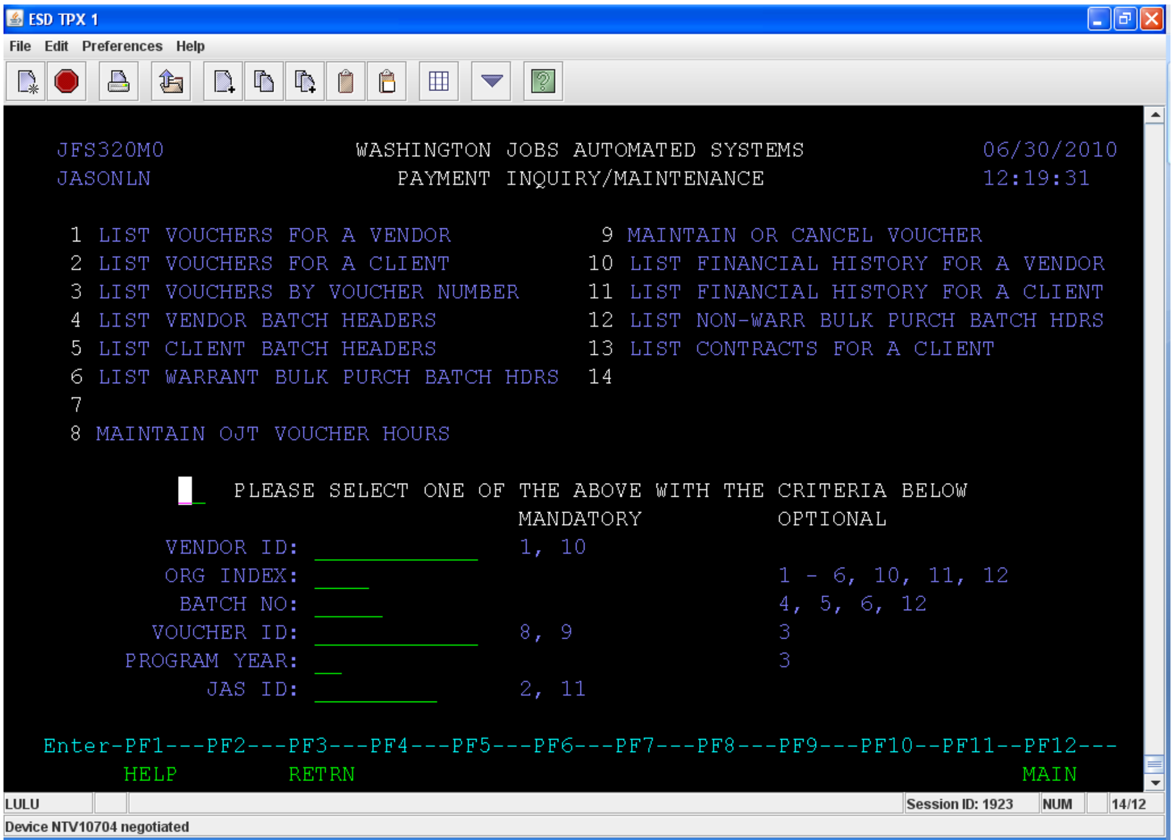
Payment Processing Menu



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)

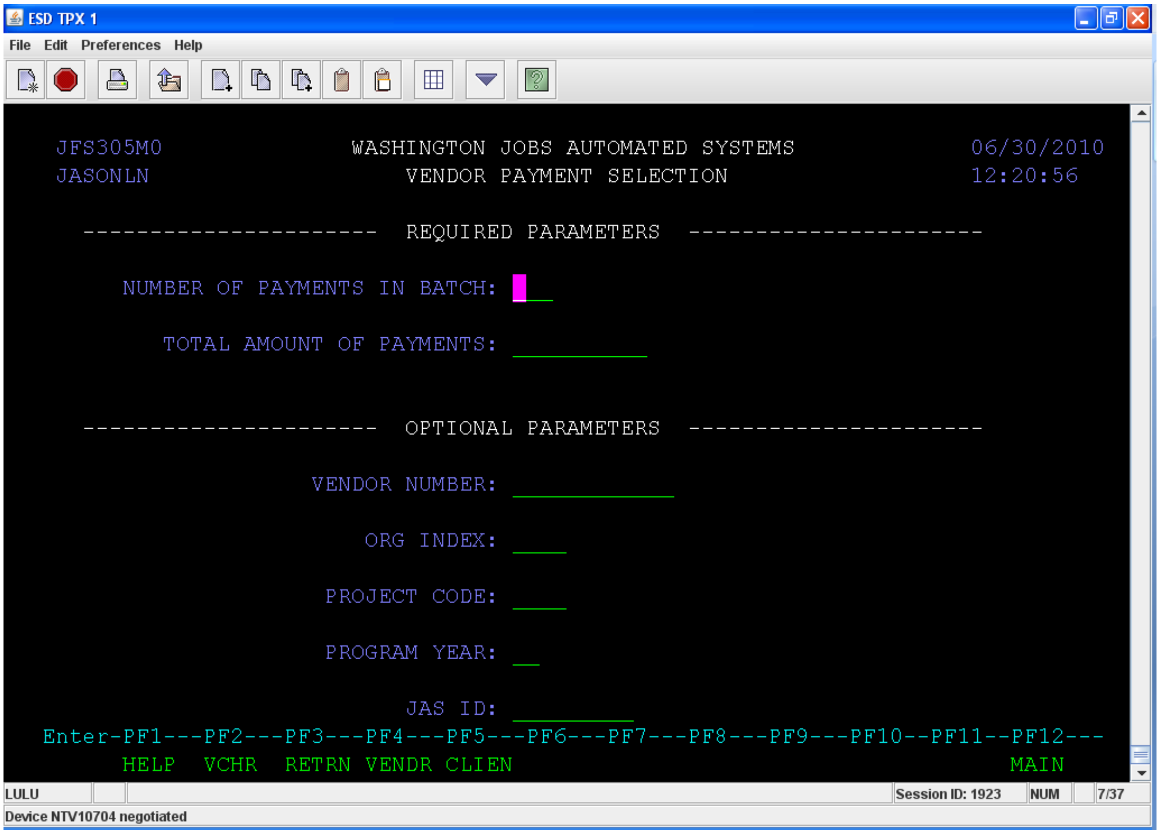
Payment Inquiry Maintenance – change, cancel or update a voucher



To make a selection, type in one of the two below numbers in the field:

- 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.

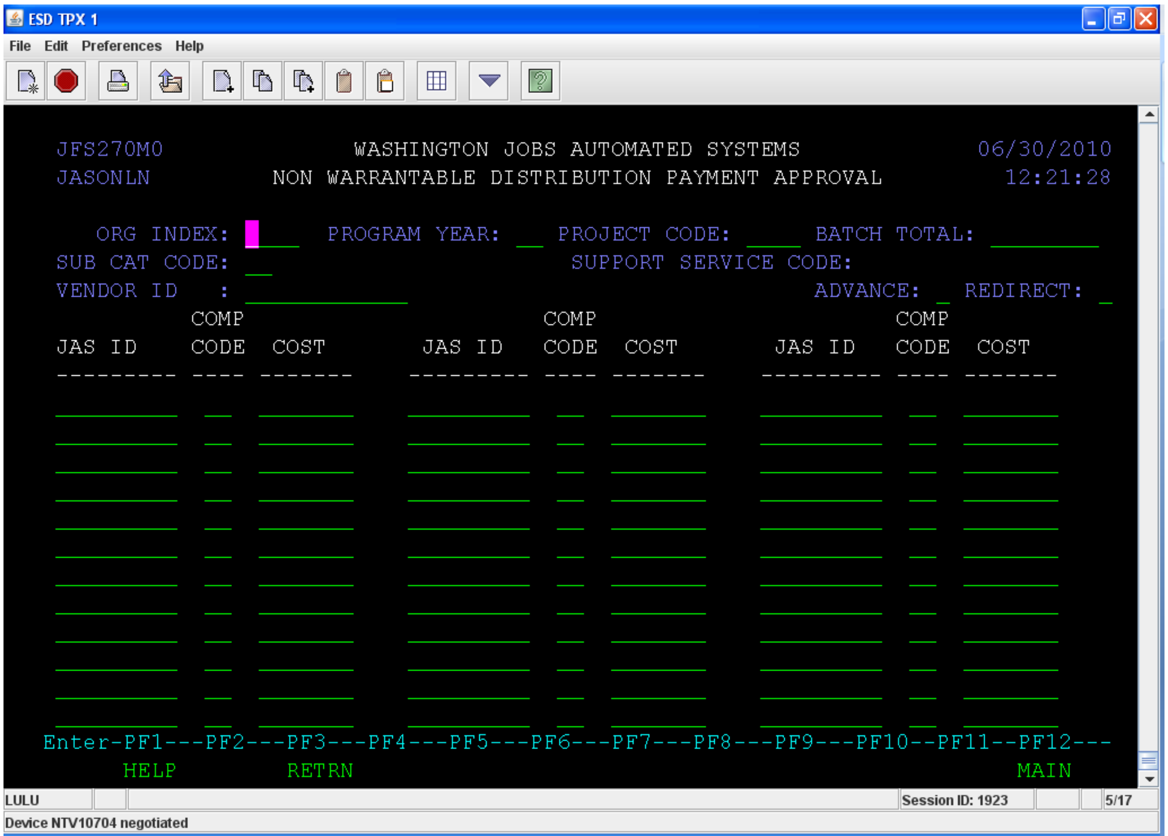
Vendor Payment Selection Menu



1. Enter the total number of payment in a batch
2. Total amount of payments (Dollar amount)
3. Press enter

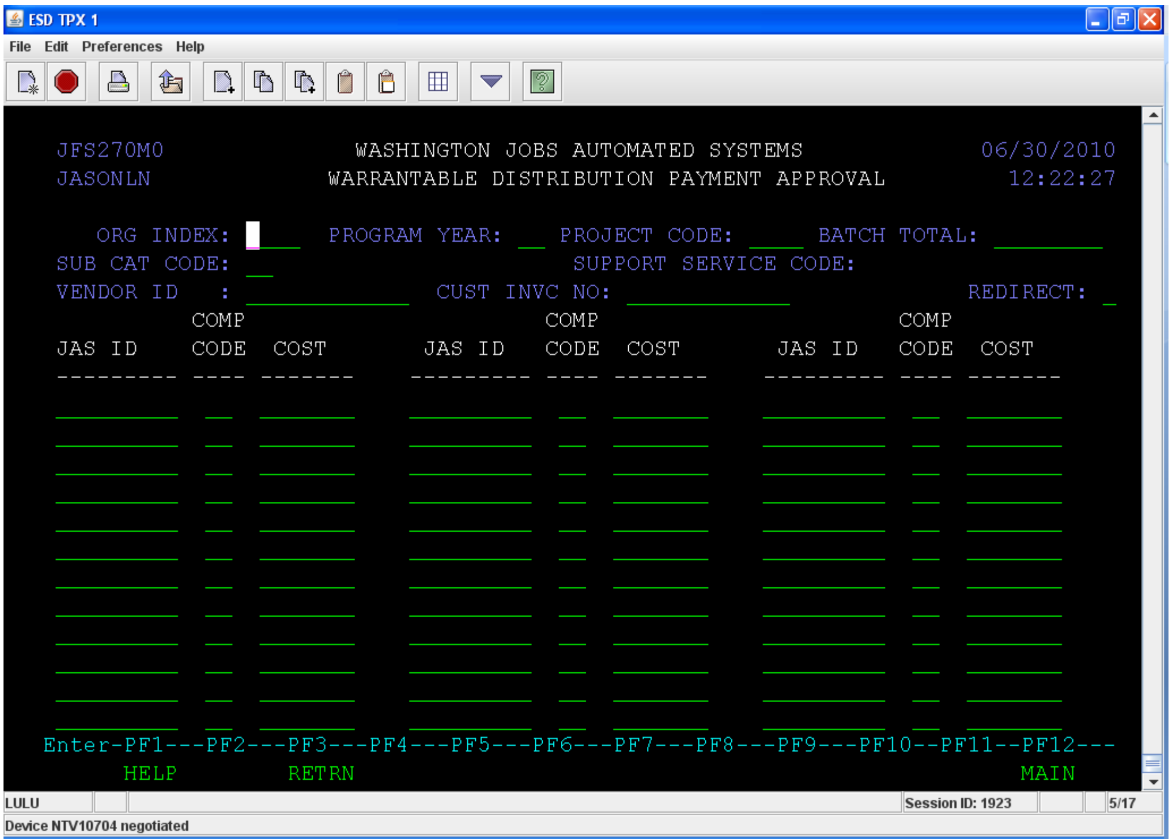
Non Warrantable Distribution Payment Approval

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

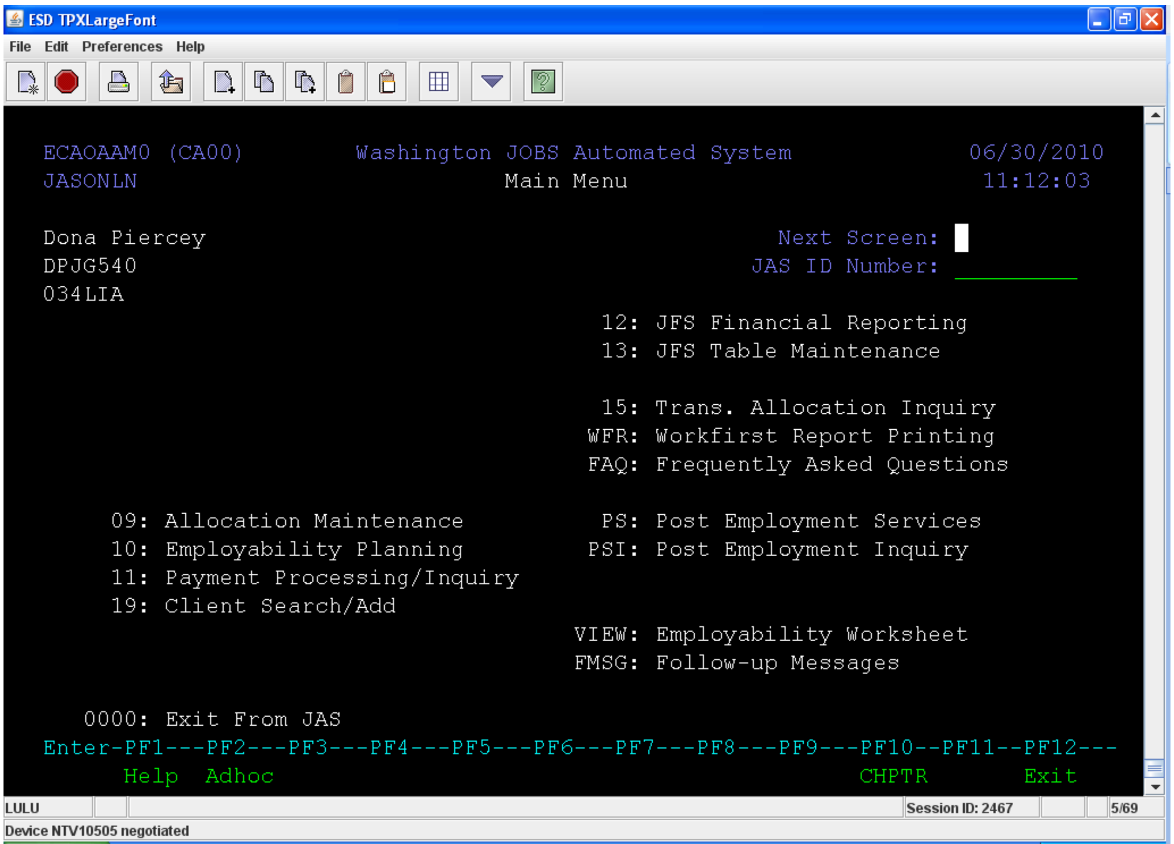
Use warrantable batches to record items NOT previously bought in bulk using an A-19, such as bus passes or classes for a group of WorkFirst participants.



JAS – How to Create a Voucher

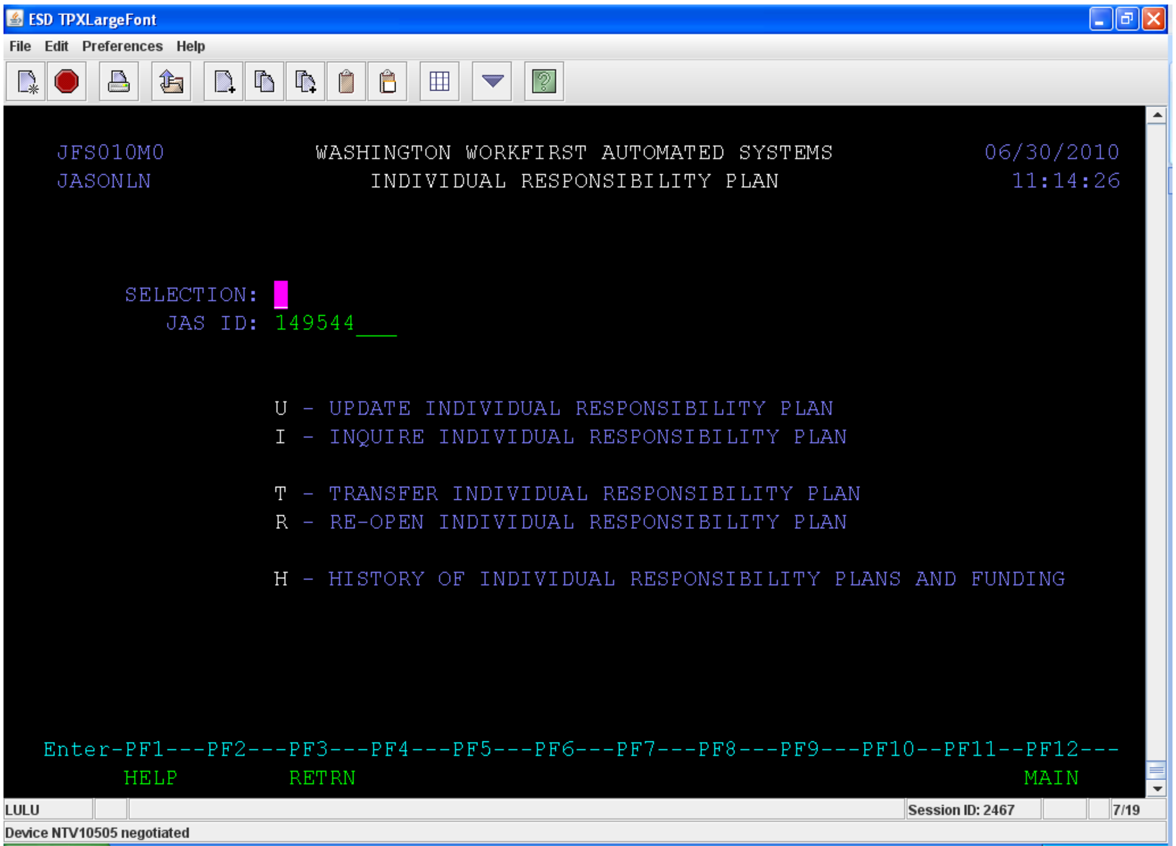
Main Menu screen

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



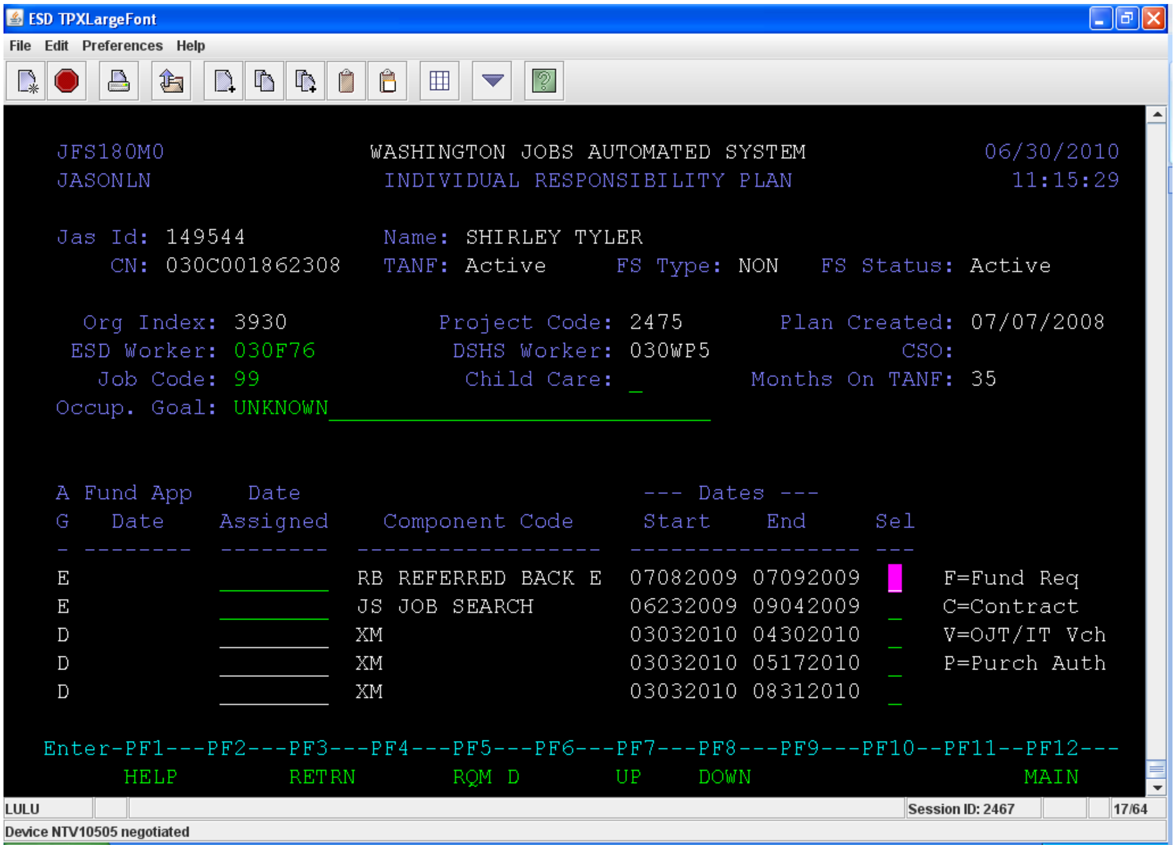
Individual Responsibility Plan Screen

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.

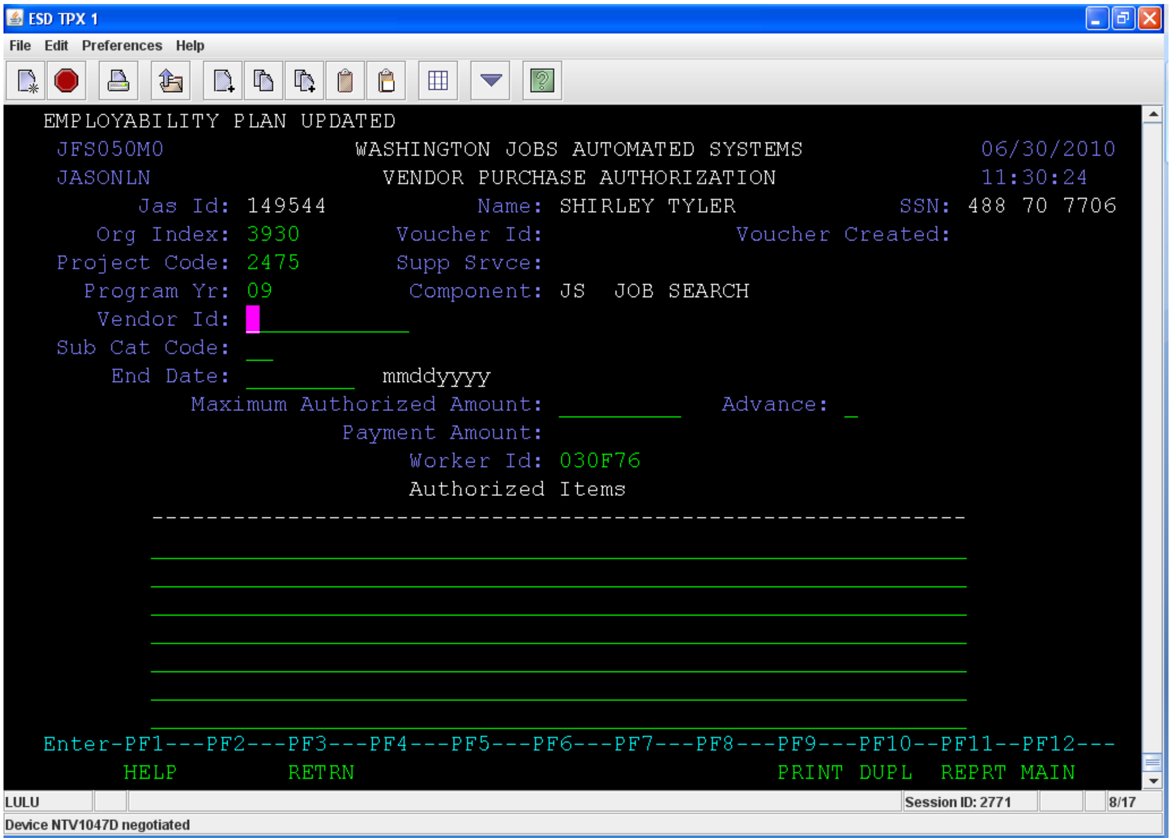


Fields on this screen to double check are:

- 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, if not go into eJAS and add the ESD Worker ID

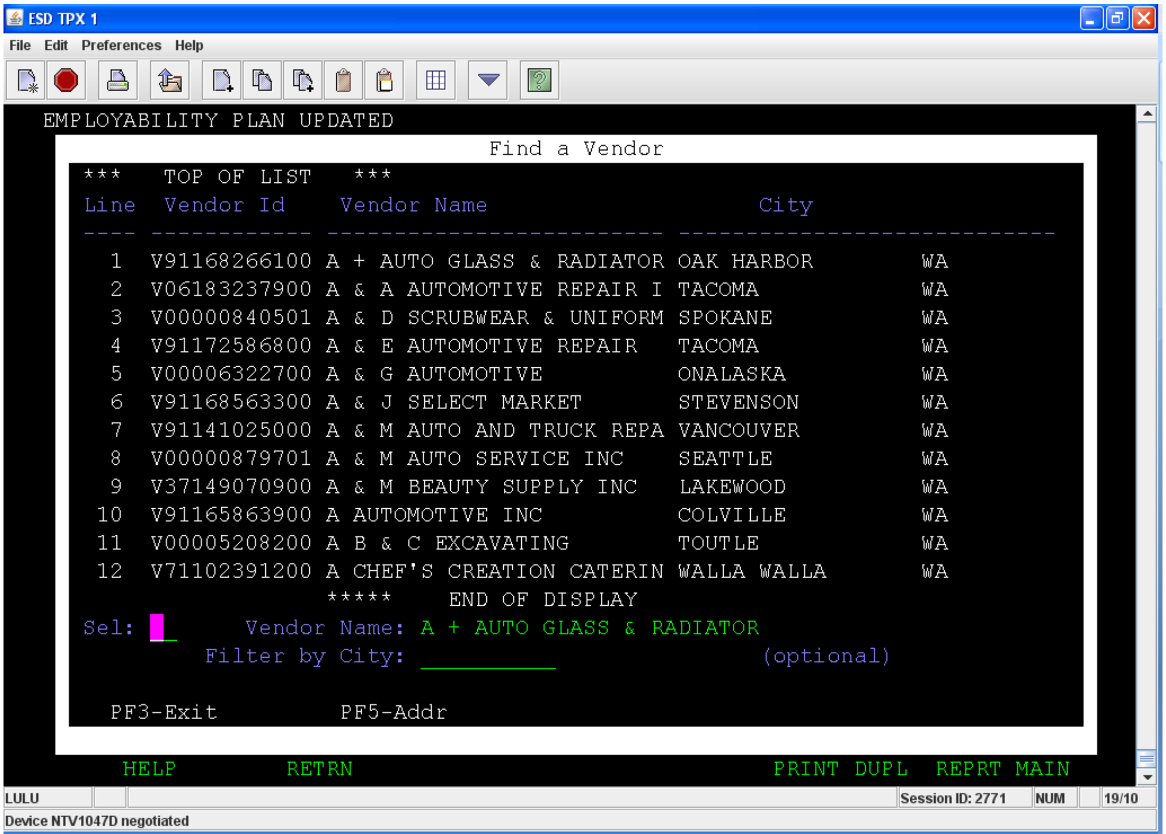
Vendor Purchase Authorization Screen

In the Vendor ID field, enter ID number.

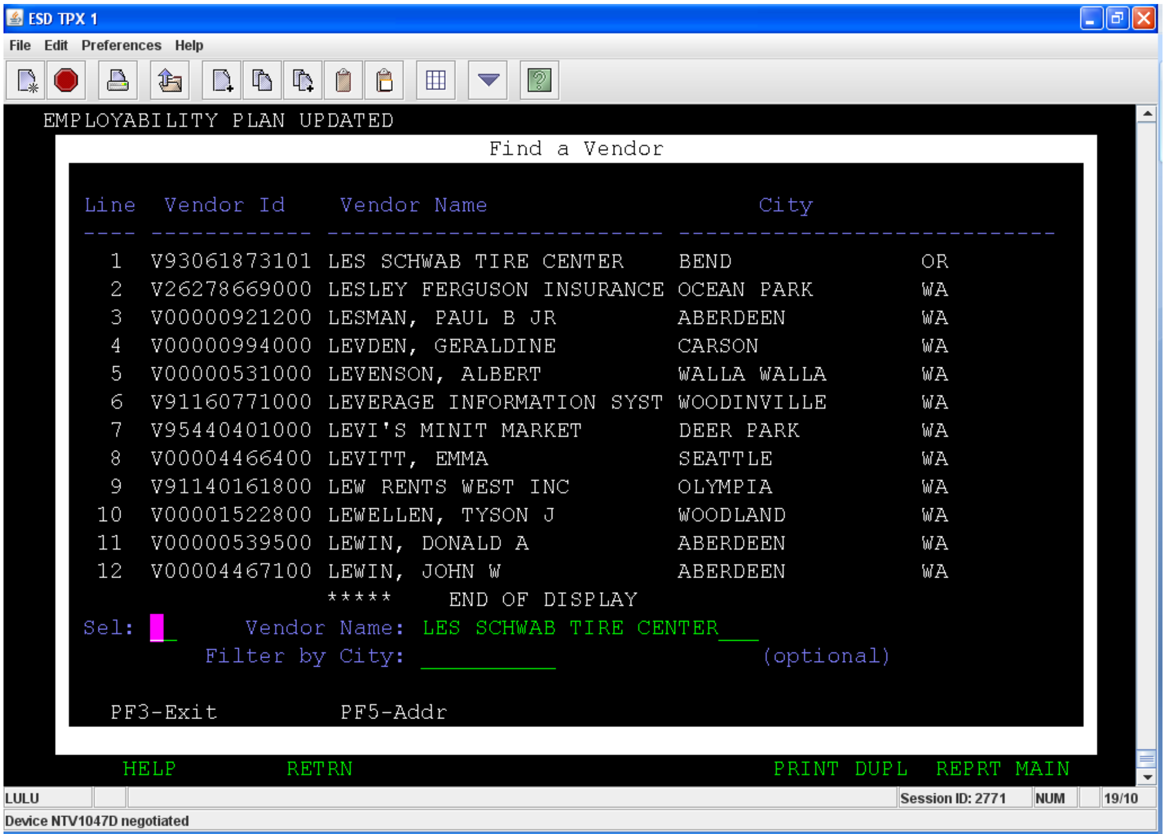


Using Automated Systems

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

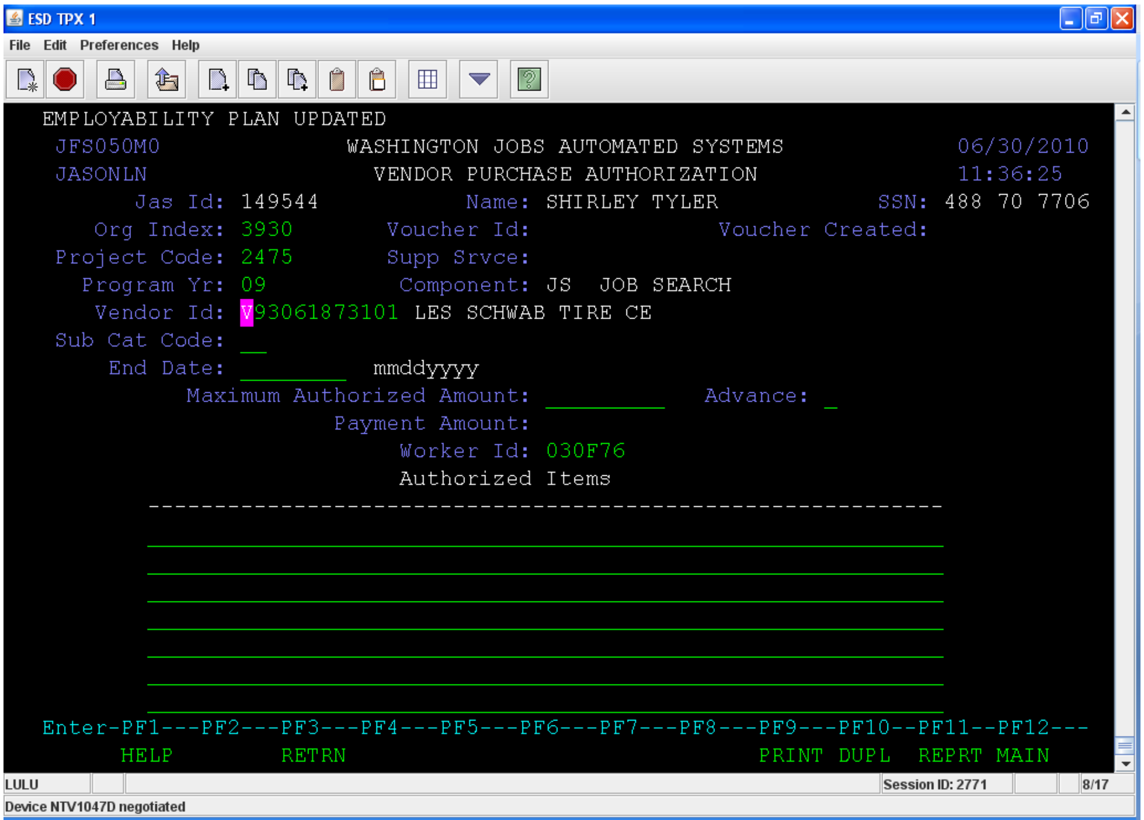


Press the Tab key and type in the vendor name and press enter.



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

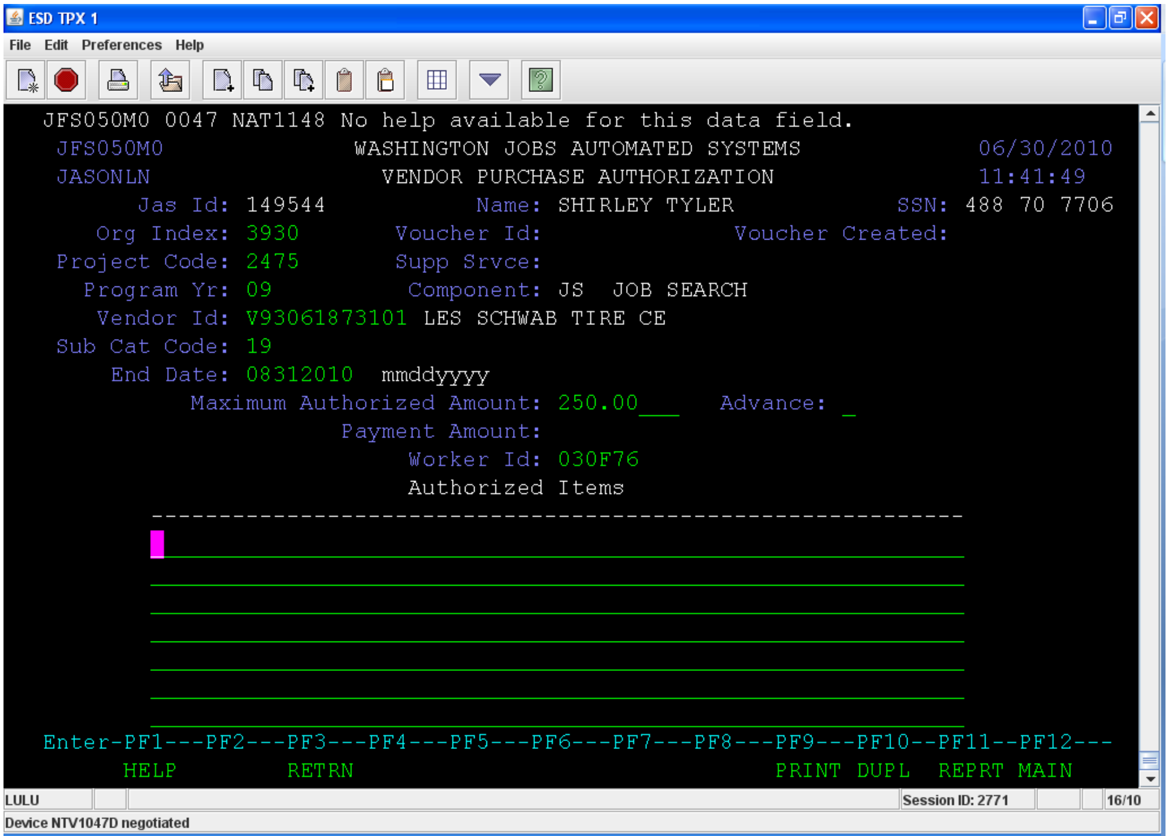
The Vendor number will be added to the Vendor ID on the voucher screen.



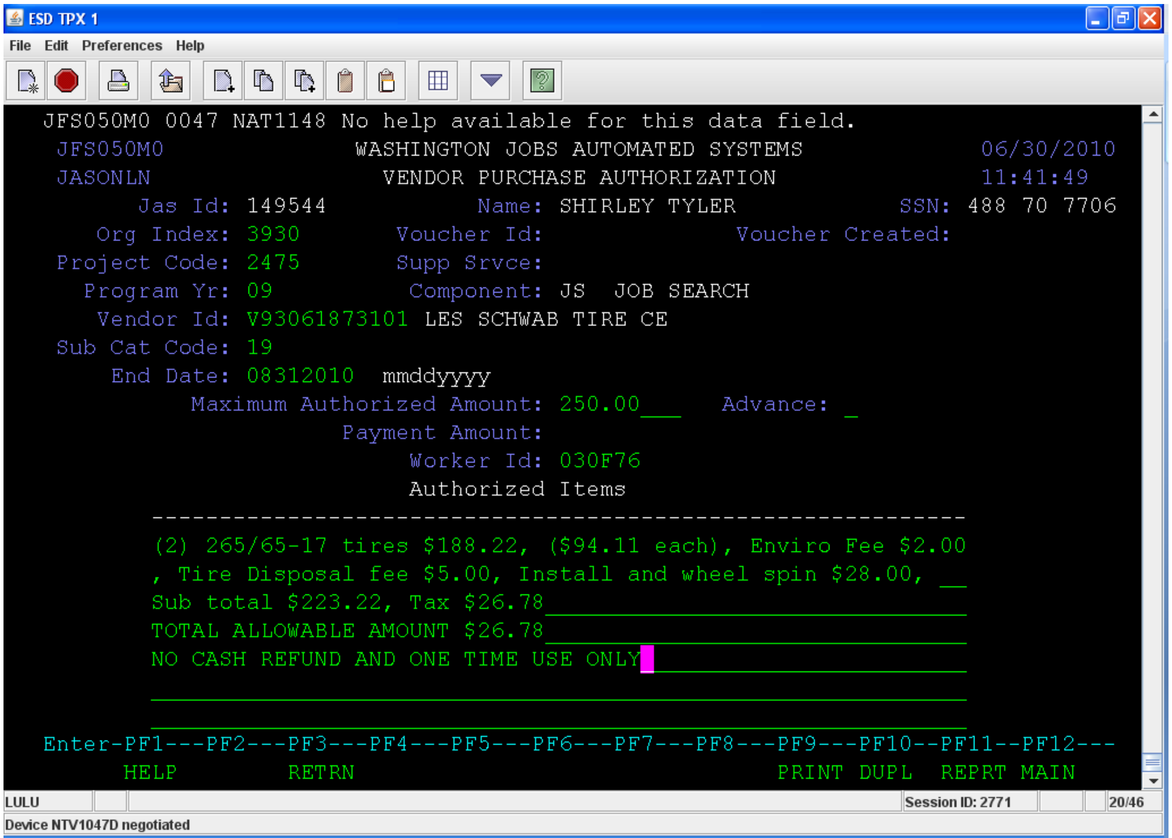
Press Tab button to the Sub Cat Code field. If you don't know the Code to use, press F1 key and a window will appear for the code descriptions or refer to the Support Service Directory. Enter the Sub Cat Code and press enter.

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 the Tab key.

Enter the Maximum Authorized Amount using this format: XX.00. Press the Tab key to move your curser to the first lined field.



Type in the description of goods or services

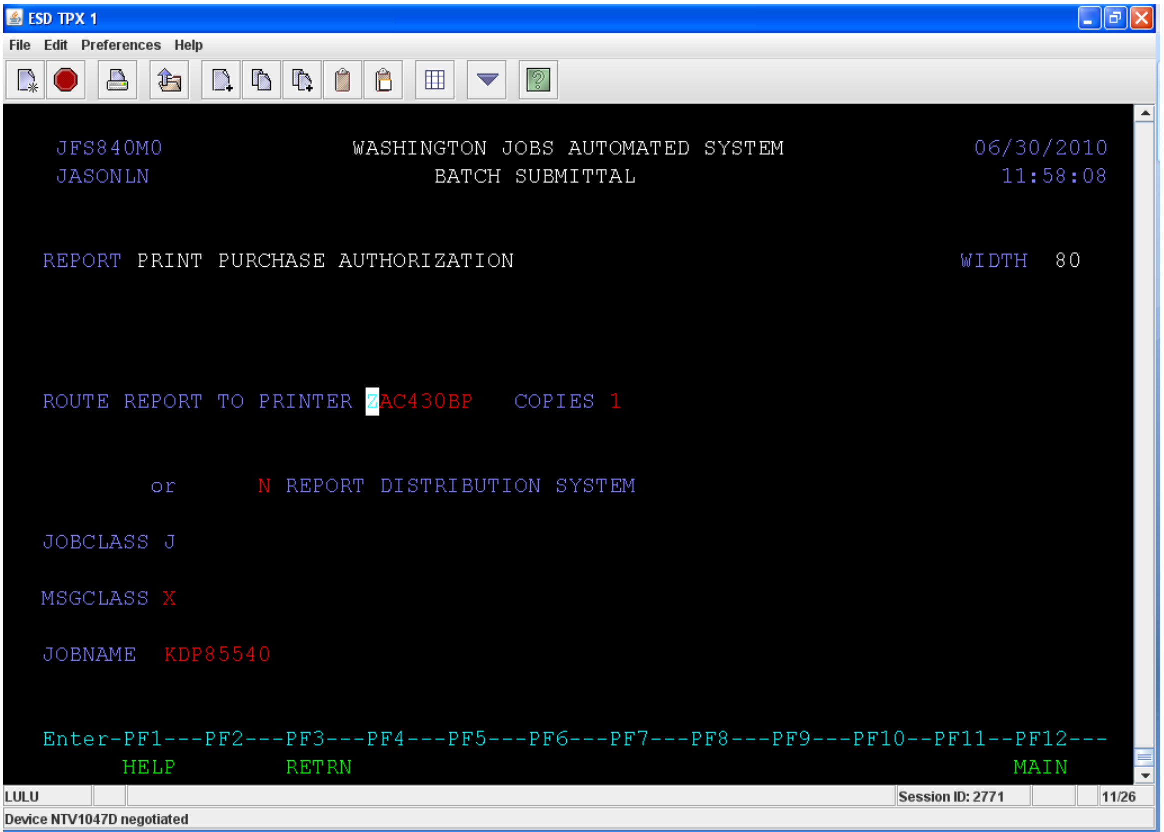


Press the PF9 key to print.

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 field, type in the number of copies needed, then press the enter key.



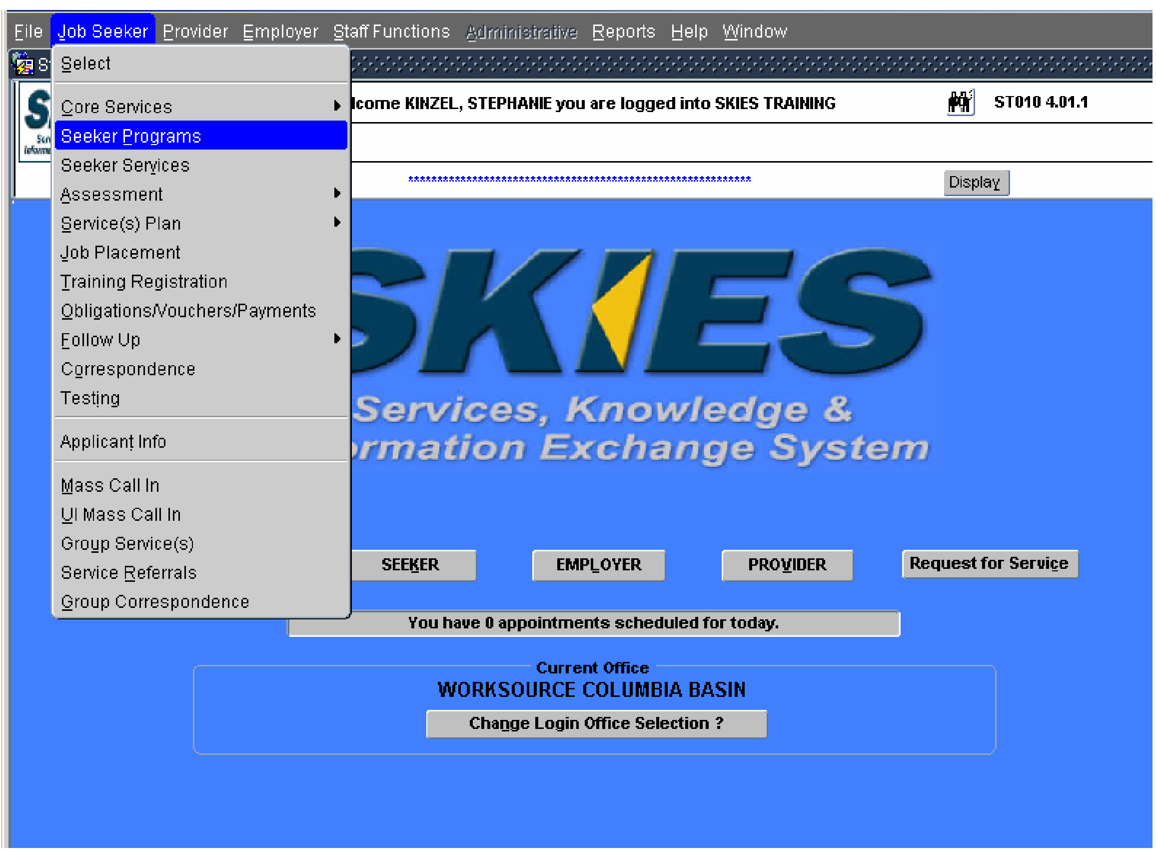
Congratulations! you just completed creating a voucher!

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.

- Ensure a SKIES registration is completed.
- When you make a referral.
- 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.



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.

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Appendices

- Appendix A: Plan of Activities
- Appendix B: Matrix of Important Steps
- Appendix C: Working with Participants with Conviction Histories

Appendices

Appendix A: Plan of Activities

Page 1

PLAN OF ACTIVITIES

Next Appointment

Name: JAS ID: Hrs required Dates: Coach:

MENU OF ACTIVITIES remember to include travel time >>	Suggested Hours	Sunday Actual	Monday Actual	Tuesday Actual	Wednesday Actual	Thursday Actual	Friday Actual	Saturday Actual	Activity
Assessments	1 - 2								
Check Email - Job Search Only	.5 - 1								
Coach Meeting	1								
Create/Target 60 Second Commercial	1								
Create/Update/Target Cover Letter	1								
Create/Update List of References	1								
Create/Update Master Application	2								
Create/Update/Target Master Resume	2								
Create/Update Thank You Letter	1								
Daily Office Visit/Check-in	1								
EMAIL/PHONE FOLLOW-UP *	.5								
INFORMATIONAL INTERVIEW *	1								
IN-PERSON CONTACT/APPLICATION*	1 - 3								
Job Club	2								
JOB FAIR/HIRING EVENT *	1 - 4								
JOB INTERVIEW *	2 - 4								
Labor Market Research	1								
ONLINE JOB SEARCH/APPLICATION *	1 - 3								
Orientation	1 - 2								
Prep for Interview	1 - 2								
Prep for Informational Interview	1 - 2								
Workshops	2-6								

* CUSTOMER REQUIRED TO ENTER ADDITIONAL INFORMATION ON BACK WHEN NEEDED TO RECEIVE CREDIT FOR ACTIVITY *

ACTIVITY HOURS > staff use only >								TOTAL		TOTAL WEEKLY HRS staff use	
HOLIDAY HOURS > staff use only >								TOTAL			
EXCUSED HOURS > staff use only >								TOTAL			
DAILY TOTAL > staff use only >								Coach Verified:			

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PLAN OF ACTIVITIES CONTACT INFORMATION

Name **JAS ID**

NOTES and planned activities	JOB CONTACT/APPLICATION INFORMATION		JOB CONTACT/APPLICATION INFORMATION	
	DATE	Business or person's name	DATE	Business or person's name
	Address or Website		Address or Website	
	Phone Number		Phone Number	
	DATE	Business or person's name	DATE	Business or person's name
	Address or Website		Address or Website	
	Phone Number		Phone Number	
	DATE	Business or person's name	DATE	Business or person's name
	Address or Website		Address or Website	
	Phone Number		Phone Number	
	DATE	Business or person's name	DATE	Business or person's name
	Address or Website		Address or Website	
	Phone Number		Phone Number	
	DATE	Business or person's name	DATE	Business or person's name
	Address or Website		Address or Website	
	Phone Number		Phone Number	
	DATE	Business or person's name	DATE	Business or person's name
	Address or Website		Address or Website	
	Phone Number		Phone Number	
	DATE	Business or person's name	DATE	Business or person's name
	Address or Website		Address or Website	
	Phone Number		Phone Number	

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Appendix B: Matrix of Important Steps

Important Steps	Key Points	Reasons
1. Paper handout or electronic POA for tracking hours and activities.	During orientation for 1st timer or 1 on 1 desk side with returner.	Help customer to achieve participation hours. Give them examples of the different activities they can do to gain hours and track their work with noting activities and Job search on the back of the POA
2. Menu of Activities/Office Calendar and sample of log.	Same as above.	Able to develop their plan for WF success using the local office activities. IRP will note the hours the customer will need to achieve weekly
3. Review in person weekly.	Coaches review plan or make adjustment with customer input. Coaches will initial the POA with confirmation of hours achieved.	To ensure progress is made for their employment goals. Also tracking the job search hours with the results noted on both sides of the POA.
4. Weekly log verification for data entry.	Coaches input hours into CATS actual hours. If hours are not reasonable, then the coaches will discuss and guide the customer on what hours are accepted.	To ensure our customers are meeting federal requirements.

Important Steps	Key Points	Reasons
5. FUTURE GOAL: To have plan located on www.go2worksource.com once the pilot is completed and the document is standardized. Local offices can put the current document on the resource room computer desk tops.	Ticket to IT department. Coaches can also email the POA to the customer so that they have ready access on their home computer.	Customer would be able to access plan from anywhere. To go to a lean process for electronic filing.

Appendix C: 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.