# **EKOS Basic Refresher Training Index Page**

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# **EKOS BASIC AND PERFORMANCE REFRESHER TRAINING**

Test site: www.ekostest.ky.gov Username:tester1 Password:july2009

- Welcome Housekeeping
  - Introduction of Trainees
- AJE/JobCentral/Other interfaces
  - o Job Orders in EKOS
- Self Service
  - o Job Search
  - Save Search
  - o Job Scout
- Staff Module
  - o Appointments/ Reminders/ Preferences/Security
  - Handout on staff Module/Security
- Explore HELP module
  - o Search for Match
- Customer Search
  - o All search tabs
  - o Desired Employer
- Customer Detail
  - Internet Resume flag
  - o Common Measures Overview (Outcomes, Enrollments & Service History)
- Activities
  - o How activities effect Common Measures Performance
  - Categories of Activities
  - o Definition of Customer Activities
  - o Definition of Employer Activities
  - o Crystal Activity Report

## • Customer Detail Features

- o IVR
- o Correspondence
- o IA Referrals
- o Matches
- Exercise
  - Customer match
- Services Module (Outcomes, Enrollments & Service History)
- Lists
  - o Customer/Employer/Job Order & Desired Employer

Revised 2/06/09.

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- Employer Search
  - o All search tabs
- Employer Detail
  - o Desired Employer
  - E3 Employer Records
- e3 Website
  - o Overview of
    - E3 Queue for Employer Record Approval
    - E3 Queue for Job Order Approval
- Job Order Search
  - o All search tabs
- Job Order Detail
  - o E3 Job Order
  - o IVR
  - o Job Order/ Employer Correspond
  - o Match
  - o Referral
- Exercise
  - o Job Order match
- EEO Reports

#### **EKOS Support Team**

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All current and previous issues of the EKOS newsletter along with a list of the customer and employer definitions can be found at: <u>http://my.edcabinet.ky.gov/ekosinfo.htm</u>

IT HELP DESK (502) 564-9216 or 866-520-0002

# EKOS GENERAL INFORMATION

- **Employ Kentucky (EKOS) Is a common system shared by multiple agencies** 
  - Any Partner that has the proper security clearance can now enter customer information in to the system.

### 🔹 Hints / Helps / Info

- DO NOT USE the BACK/FORWARD Buttons or the REFRESH BUTTON on your windows bar located at the top of the page or you will loose all information entered, and be kicked out of Employ Kentucky.
- **Employ Kentucky (EKOS)** has an automatic timeout feature, after 30-40 minutes of inactivity, you will be required to log back onto the system.
- <u>All</u> information entered into the system should be entered using the proper Upper or Lower Case letters.
- Always, go to Search before pulling up a "Customer, Employer, Provider or Job Order"
- 4 Tabs that must be completed to create a record are General, Add'l Info, Objective, Skills
- Any gray tab or button Means you do not have access to alter.
- (green dot) means required field. Failure to complete any required field will result in an error message.
- You will need to use a "Double click" instead of a "single"
- State Field defaults to **KY** Country defaults to **USA**

#### Several Keys have Multiple Functions

- **F11-** Allows you to switch between a normal screen and a full screen
- **SHIFT-** Selects more than one customer record at a time Hold down shift, Click on the first customer name while holding down (the shift button) click on the last customer name you want to highlight.
- **ALT-** To select more than one randomly Hold down ALT click got to the next record and click.

#### Things to remember:

- Update Password (we suggest you should change your password every quarter)
- Check daily- Appointments/ Calendar / Reminders
- View future appointments/calendar
- "Help Module" a comprehensive indexed help manual of each module
- "Correspondence Help" can access templates used in correspondence and can be downloaded to your PC

## Website Resources

# <u>Test sites</u>

EKOS test (username: tester1) (password: july2009) https://www.ekostest.ky.gov e3 Test https://e3test.ky.gov Self-Registration test https://selfregtest.ky.gov Self Service test http://www.ekostest.ky.gov

# Production Sites

EKOS Production <u>https://www.ekos.ky.gov</u> e3 Production <u>https://e3.ky.gov</u> Self-Registration Production <u>https://selfreg.ky.gov</u> Self Service Production <u>http://www.ekos.ky.gov</u>

# <u>Miscellaneous Sites</u>

America's Job Exchange http://www.americasjobexchange.com/ Job Central http://www.JobCentral.com Labor Market Information www.workforcekentucky.ky.gov DOL Common Measures http://www.doleta.gov/performance ONET definitions http://online.onetcenter.org/ Zip code http://zip4.usps.com/zip4/welcome.jsp

EKOS Info Site: Business Rules, Training Schedules, Definitions, Customer and Employer Activities. Click link below <u>http://my.edcabinet.ky.gov/ekosinfo.htm</u> Updated 2/9/2009.

# Employ Kentucky Operating System Business Rules

This document contains the guiding principles regarding how agencies will use EKOS in the provision of their services. It is expected that all staff will adhere to these guidelines.

#### I. Customers

#### A. Customers

- 1. All Customers must be registered in EKOS.
- 2. Customers must be registered in EKOS prior to job referrals and/or services being provided.
- 3. If the Customers is not registered in EKOS, staff will enter the registration information into the Mediated Production site of EKOS or the Customers, utilizing Self-Registration, will input the required data for a registration into EKOS.
- 4. Staff must review the registration record for accuracy and completeness and make updates as appropriate.
- 5. The Customers registration Status must be active if the Customer is receiving activities or services from any agency. If this field is in 'Inactive' status, staff is to manually change the status field to 'Active'.
- 6. If the Customers is seeking employment, the Job Seeker Status must be Active. If this field is in Inactive Status, staff are to manually change the Job Seeker Status Field to Active.
- 7. "Failed to Report" and "Refused Job" are activities that must be reported in EKOS on a Customers record and must be reported to UI staff for Disputed Claims Investigator (DCI) to investigate.
- 8. When entering a new record for a customer, staff should enter a pseudo number when the customer social security number is not available. If this is used then staff must place a check mark in the "N/A" field that the customer record will not count in performance. ex: 999-71-1262
- a) System = 39's
- b) Your 2 digit office number
- c) Customer's month and year of birth or last four digits of their social security number

#### **II.** Employer

- **B**. Employer
  - 1. The Federal Employer Identification Numbers (FEIN) is used to identify and validate employers. The FEIN is a unique nine-digit number assigned by the Internal Revenue Service (IRS) to business entities operating in the United States for the purposes of identification. This field is mandatory for all EKOS employer records
    - a) To create a new employer record, first conduct a search by FEIN and then by employer name to determine whether the employer record is already in EKOS. There should be only one active record per FEIN.
    - b) If there are duplicate employer records, and one of the records is an e3 record, the e3 record will always be your active record. If there is not an e3 record, inactivate the other record(s) with no job orders or activities. If the other record(s) have open job orders attached, inactivate the one(s) with the oldest job order. The system will allow staff to inactive an employer record with an open order. Staff will also need to manually add the employer contacts from the 'inactive' record(s) to the 'active' record if they do not already exist. Place a post a note on the employer record's comment section stating why it is being inactivated.
    - c) When reviewing duplicate records never inactive the e3 record, this will result in locking out the e3 employer from their account.
  - 2. Activities to an employer must be documented in the Employer Module using the 'Activity' button. If the specific activity is not available as a selection, staff should document information in comments with 'Post A Note'. Or contact the EKOS Team with a request to have that specific activity added to the activities list. This will give all agencies access to the history.
  - 3. Up to 300 employer contacts can be added to an existing employer record. Employers may have multiple locations, each with their own contact.
  - 4. When entering a new record for an independent contractor (as defined by UI auditors), we will use a pseudo FEIN number ex: 99-9701161
    - a) System = 39's
    - b) Your 2 digit office number
    - c) Contractor's month and year of birth or last four digits of their social security number
  - 5. FEIN is not required for independent contractors. Always put a 'Post A Note' that the employer stated they are not required to have a FEIN.
  - 6. Prior to contacting an existing employer, review the employer record for recent activities and comments. After contacting the employer update the record as appropriate.
  - 7. When entering an employer activity, add comments as appropriate.

#### III. Job orders

#### C. Job Orders

Federal Performance mandates the reporting of job orders and openings received. Therefore it is critical that all the business rules relating to the taking, writing and maintenance of job orders be followed.

As per the United States Public Laws, 107<sup>th</sup> Congress, Second Session document PL 107-288 (HR 4015), November 7, 2002, JOBS FOR VETERANS ACT.

"An Act to amend title 38, United States Code, to revise and improve employment, training, and placement services furnished to veterans, and for other purposes."

"The term 'priority of service' means, with respect to any qualified job training program, that a covered person shall be given priority over non-veterans for the receipt of employment, training, and placement services provided under that program, notwithstanding any other provision of law."

- 1. Veterans Priority:
  - a) All staff, not just Veteran staff, must maintain Veterans priority and those agencies that enter job orders **must ensure** that Veterans are accommodated.
  - b) At the time a new job order is received and input into EKOS, staff/agency has the responsibility of performing Veterans priority search. If veterans matching the job order criteria are found, staff/agency is to initiate an IVR and/or contact the veteran.
- 2. Employers have a variety of options to post jobs in EKOS/AJE.
  - a) Input job orders through e3 at e3.ky.gov.
  - b) Input job orders directly into America's Job Exchange (AJE).
  - c) Contact a One-Stop Career Center or Local Office in-person, phone, fax, mail, and/or email. If an employer outside your service area or out-of-state, contacts you to list a job order, inform the employer that there is a One-Stop Center in his/her area. However, you are to take and input the job order if the employer prefers.
- 3. Agencies shall designate an assigned staff on each job order when it is written.
- 4. The assigned staff for a job order shall be contacted if there are questions or changes regarding the job order.
- 5. If it is discovered that the employer already has the same job listing(s), staff should inform the employer that a job order is currently open in the system and not duplicate the job order.
- 6. When entering a job order, staff should always complete the Referral Info tab. This is where staff will get the referral information to give to job seekers. The Hiring Contact on this tab may be different than the person listed on the Contact Info tab making it all the more important to complete the Referral Info tab. Any specific referral instructions are to be entered on this tab in the designated field. There is also other vital information about the job that is housed on this tab making screening applicants more efficient and referrals more appropriate.
- 7. A referral can only be made on an 'open' job order.

- 8. The referral method and hiring contact information are located on the Referral Info tab in the Job Order. This is where staff should get <u>all referral information</u> when referring job seekers on that order. There is a field on this tab that contains specific referral instructions for the job seeker along with the hiring contact and method.
- 9. Once you confirm that the customer meets the job order requirements and that they have a work history completed that reflects the years experience require by the employer, referrals may be made in person, by IVR, or telephone.
- 10. If an employer requests that an agency screen applicants based on factors that violate state or federal law, the employer must be told we will be unable to service that order. Applications containing questions that violate state or federal ADA and EEO laws will not be distributed by staff.
- **D**. Job Order Maintenance
- 1. Assigned staff will ensure a match is performed on a new job order and continue on a weekly basis until the job order is filled or closed.
- 2. Staff that refers a job seeker to an employer that has a position listed in EKOS is required to enter a referral for that Customer into EKOS.
- 3. Staff must conduct a follow up with the employer to obtain placement results.
- 4. Follow up may be completed by phone, fax, email, or mail.
- 5. All job orders in 'referred' status must have follow-up the day after they are moved to 'referred' status.
- 6. All results must be posted on the job order 'Comments' Tab of EKOS.
- 7. Only assigned staff can make changes or updates to job orders.
- 8. These specific changes/updates should only be changed by designated staff:
  - a) Referral
  - b) Number of openings
  - c) Status change and
  - d) Contact method
- 9. If changes are necessary please notify the assigned staff
- 10. Always 'Post A Note' when demographic changes are made.
- 11. After the end of a quarter, when a job order is 'Closed' or 'Filled', they are not to be reopened if the employer makes the position available again, instead a new job order must be written for the position(s).
- 12. Archived job orders can only be used for duplicating a job order.
- 13. The number of Job Openings should not be lowered to make the openings match the placements. Federal Performance (9002E) is based on the 'Number of Openings Received'.

- 14. Staffs are not to re-open a Job order that is in 'Referred', 'Closed', 'Suspend' or 'Filled' status to make a referral. Staff must first read Comments to see if any information regarding the status has been documented and/or contact the office or assigned staff who input the Job order.
- 15. The 'Emp Req #' field on the job order 'Detail/General Info' Tab is to be used to record a position number that may be assigned by an employer.
- 16. The 'Employer Job Title' field on the job order 'Detail/General Info' Tab is used to enter the title that the employer uses for the position they are listing. This title must not be discriminatory or gender specific.
- 17. If the Employer and/or Employer Contact have an email and/or Company URL, these should be listed on the job order and the Employer Registration.
- 18. Suppress job orders field: Job orders are to be checked "Yes" unless specified otherwise.
- 19. The 'Source (State)' field on the job order 'Detail/General Info' Tab has 'Application Only, Full Service' and 'Job Fair' as selections. This field is to be completed as appropriate.
- 20. The 'Source (Fed)' field on the job order 'Detail/General Info' Tab has 'Employer Listing', 'Job Development' and 'Mandatory Listing' as selections. This field is to be completed as appropriate.
- 21. The job order 'Detail/Job Description' Tab requires an entry of 5 to 4000 characters. 'Word Spell Check' must be used to check the correctness of spelling and grammar.
- 22. On the job order 'Detail/Job Detail' Tab, certain fields are not 'green-dotted' but should be completed to ensure better customer service.
- a) Referrals Requested
- a) Hours Per Week
- b) Work Days
- c) Shift
- d) Experience Required
- e) Starting Pay Minimum, Maximum and Unit
- f) Drivers License Class
- g) Endorsements
- h) Keyboarding Speed
- i) Public Transportation
- E. FLC, H2A, and H2B job orders

Field staff <u>should not be making any changes</u> to these job orders (Only Central Office Staff make changes to these orders). Field Staff <u>should</u> perform Matches and make Referrals on these orders as appropriate.

#### IV. Resumes received in response to Job orders

Offices shall have staff designated to receive, review and process resumes received in response to a Kentucky Job order listed in EKOS and AJE by contacting the customer in a timely manner to register within our system before a referral can be generated.

#### V. Staff Security Levels

- a) Security levels will be based on job duties and training provided by the EKOS team only. When the initial request for EKOS security is received staff will be given the ability to add customer records and customer activities in the system. Once OET staff has attended "EKOS Basic" training they will receive the ability to insert employer records and attach job order referrals, if needed. Once WIA staff has attended "EKOS Basic" training they will receive the ability to attach services and service offerings to customer records, if needed. The EKOS security contact for the OET office/WIA Office will need to send an email to the EKOS Project Mailbox (ekos.project@ky.gov) if the additional access is needed after "EKOS Basic" training has been completed. The ability to enter job orders is only granted to any staff once they have completed "Job Order Writing" training, no additional email is required for this.
- b) Security for new employees must be requested by office management on the EKOS Request form and submitted electronically to the EKOS Project Mailbox at <u>ekos.project@ky.gov</u>
- Security updates for existing staff can be requested by submitting an email to the EKOS Project Mailbox at <u>ekos.project@ky.gov</u>
- d) All staff that will input referrals for customers must be provided the appropriate training and security clearance level for this functionality.

#### VI. EKOS Help Desk

An EKOS Help Desk email box <u>Ekos.Project@ky.gov</u> is set to receive problems and/or questions regarding EKOS/e3, AJE and Self Registration and should not be emailed to individuals on the EKOS team. Inquiries/questions not pertaining to EKOS are to be forwarded to DTS Help Desk at 502-564-9216 or (toll free) 866-520-0002.

#### VII. Super Users (Point of Contact [POC])

All problems relating to EKOS should be reported by the POC established within each agency to the EKOS Help Desk at <u>Ekos.Project@ky.gov</u>.

# **Data Exchange Chart for EKOS**

 Kentucky has 7 bordering states (2 most in the nation) TN, OH, WV, VA, IN, IL, MO & 2 Counties in Arkansas



- Self- Service Job Seekers will use this module to perform their job search, save their searches and create job scouts
- Self-Reg Job Seekers submit and update their resume using this module
- Everyone who files an Unemployment Insurance claim through KEWES who are subject to work search also creates a resume in KEWES that is sent to EKOS

7.8. Inbox Tab

1D	ox Referrals	in Fund Ap	proval rs for Tuesd	ay, May 15, 2	007		
	Start Date	End Date	Start Time	End Time	Name	Event	Description
	05/02/2006	05/02/2005	12:00 am	12:00 am	fasdfasdf, awerawerasdf	MISSed date	Service should have ended.
	05/02/2006	05/02/2006	12:00 am	12:00 am	asdfasf, wgergwrf	Missed date	Service should have ended
	05/02/2006	05/02/2006	12:00 am	12:00 am	asdfasf, wgergwrf	Missed date	Service should have ended
	05/02/2006	05/02/2006	12:00 am	12:00 am	asdfasf, wgergwrf	Missed date	Service should have ended
	07/08/2005	07/08/2005	12:00 am	12:00 am	Abdunnasir, Hafied	Reminder (LIVNum Testing)	Post Test should be given.
	07/08/2005	07/08/2005	12:00 am	12:00 am	Abdunnasir, Hafled	Reminder (Lit/Num Testing)	Post Test should be given.
	01/01/2007	01/01/2007	12:00 am	12:00 am	fsdtwer, gwertwer	Missed date	Service should have ended.
	12/12/2006	12/12/2005	12:00 am	12:00 am	asdt, sadt	Missed date	Missed achievement objective end date
1	12/12/2006	12/12/2006	12:00 am	12:00 am	asdf, sadf	Reminder	Achievement objective to end
	12/12/2006	12/12/2006	12:00 am	12:00 am	asdf, sadf	Missed date	Missed achievement objective end date
	01/01/2007	01/01/2007	12:00 am	12:00 am	fsdfwer, gwerfwef	Missed date	Service should have ended
	02/02/2006	02/02/2005	12:00 am	12:00 am	QA_RESERVED, INSERTDAVEtransvet	Reminder	Objective/Services review
					esane Detail Adda	one info Print	

- 7.8.1. The Inbox tab is a list of scheduled events and reminders that will display the following fields for each event:
  - 7.8.1.1. Start Date this is the date that the event is scheduled to occur formatted: MM/DD/YYYY
  - 7.8.1.2. End Date this is the date that the event is scheduled to end formatted: MM/DD/YYYY
  - 7.8.1.3. Start Time this is the time that the event is scheduled to occur formatted: HH:MM a.m. or p.m.
  - 7.8.1.4. End Time this is the time that the event is scheduled to end formatted: HH:MM a.m. or p.m.
  - 7.8.1.5. Name this is the customer or employer contact name formatted: Last Name, First Name.
  - 7.8.1.6. *Event* this field is the title of the event and can be scheduled meetings, start date reminders, service reminders, etc.
    - 7.8.1.6.1. This information is automatically populated if the Inbox item is generated from the reminder batch job.
    - 7.8.1.6.2. If the Inbox item is generated from an appointment scheduled in Customer Detail or Employer Detail, the information is user-defined.
  - 7.8.1.7. Description this is a description of the event.
    - 7.8.1.7.1. This information is automatically populated if the Inbox item is generated from the reminder batch job.



- 7.8.1.7.2. If the Inbox item is generated from an appointment scheduled in Customer Detail or Employer Detail, the information is user-defined.
- 7.8.2. The Inbox tab shall display a maximum of 1000 inbox items.
  - 7.8.2.1. If there are more than 1000 inbox items, the following warning shall be displayed:

7.8.2.1.1. Warning: "Only the first 1000 are shown."

- 7.8.3. The buttons available for the Inbox tab are:
  - 7.8.3.1. Delete Message this button allows the user to delete Inbox messages when they are no longer needed.
    - 7.8.3.1.1. The application does not automatically delete messages.
      - 7.8.3.1.1.1. The user must manually delete the Inbox items to remove them from the display list.
    - 7.8.3.1.2. The user may choose multiple messages to delete.
      - 7.8.3.1.2.1. When multiple messages are selected, the Detail button will be disabled.
    - 7.8.3.1.3. Once a message is chosen for deletion and the OK button is clicked, the message shall be removed from the screen.
      - 7.8.3.1.3.1. Selecting the 'Save' button described in Section 7.3 shall be required to save the deletion in the database.
  - 7.8.3.2. *Detail* this button allows the user to view detail about the person identified in the Inbox message.
    - 7.8.3.2.1. If the person is an employer contact, then the user will be taken to the Employer Detail/Contact Info tab.
    - 7.8.3.2.2. If the person is a customer, then the user will be taken to the Customer Detail/General Info tab.
  - 7.8.3.3. Additional Info this button provides access to additional information that is available about the inbox item.
    - 7.8.3.3.1. This button shall be disabled when there is no additional information available about the selected Inbox item.
    - 7.8.3.3.2. This button shall be disabled if multiple inbox items are selected.
    - 7.8.3.3.3. When selected, a popup window shall be displayed with the additional information.
      - 7.8.3.3.3.1. Tab Name: "Additional Info"
      - 7.8.3.3.3.2. The verbiage displayed will be the corresponding information that may be available.
      - 7.8.3.3.3.3. A button shall be provided to close the popup window.

7.8.3.3.3.3.1. Button Text: "OK"

- 7.8.3.4. Print the list of Inbox items can be printed by clicking on the Print button.
  - 7.8.3.4.1. A scrollable pop-up window displays all the information on the tab.

7.8.3.4.2. Two buttons are displayed at the bottom of the screen:

- 7.8.3.4.2.1. Print- sends the list to the user's printer.
- 7.8.3.4.2.2. Cancel- closes the pop-up window and returns the user to the previous screen.



- 7.8.4. The Inbox data is collected in the database in the following four ways:
  - 7.8.4.1. Scheduling an appointment via the Schedule Appointment button on Customer Detail/General Info tab.
    - 7.8.4.1.1. Appointments scheduled in this manner are added to the Inbox upon being saved.
  - 7.8.4.2. Scheduling an appointment via the Schedule button on the Employer Detail/Contact Info tab.
    - 7.8.4.2.1. Appointments scheduled in this manner are added to the Inbox upon being saved.
  - 7.8.4.3. Re-opening a closed enrollment from the Customer Services/Enrollment tab.
    - 7.8.4.3.1. This reminder shall be created for each re-opened program enrollment per indication of a flag in the Federal Program table in Admin.
    - 7.8.4.3.2. This reminder shall be created for the administrator that terminated the enrollment.
    - 7.8.4.3.3. The reminder shall consist of the following information:
      - 7.8.4.3.3.1. Start Date column: The current start date of the reminder formatted: MM/DD/YYYY
      - 7.8.4.3.3.2. End Date column: The current end date of the reminder formatted: MM/DD/YYYY
      - 7.8.4.3.3.3. Start Time column: The current time of day, formatted HH:MM (am or pm)
      - 7.8.4.3.3.4. End Time column: The current time of day, formatted HH:MM (am or pm)
      - 7.8.4.3.3.5. Name column: Name of the customer formatted: Last Name, First Name
      - 7.8.4.3.3.6. Event column: "Enrollment Reopened."
      - 7.8.4.3.3.7. Description column: "<FED PGM> Reopened for <SEEKER ID>"
        - 7.8.4.3.3.7.1. <FED PGM> shall be replaced with the name of the Federal Program.
        - 7.8.4.3.3.7.2. <SEEKER ID> shall be replaced with the customer ID associated to the re-opened enrollment.
  - 7.8.4.4. Via a nightly batch job that looks for certain date triggers in the database.
    - 7.8.4.4.1. Appointments/reminders scheduled in this manner are added to the Inbox when the batch job has completed running.
    - 7.8.4.4.2. The date triggers used for determining when an Inbox item is to be created are established by data collected in the Customer Services/Achievement Objectives and Customer Services/Services tabs.
      - 7.8.4.4.2.1. The triggers are listed in the following table, along with the event name and event description that will display for the reminder when it is added to the Inbox:

Tab	Trigger	Event_Name	Event_Description
		59	



Tab	Trigger	Event_Name	Event_Description
Achievement Objective	The day before this date and actual_start_date = null	Reminder	Achievement objective to start
Achievement Objective	Today's date = Planned_start_date and the actual_start_date = null	Reminder	Objective should start today
Achievement Objective	The day after this date and Actual_start_date equals null	Missed date	Missed achievement objective start date
Achievement Objective	The day before this date and the actual_end_date = null	Reminder	Achievement objective to end
Achievement Objective	Today's date = Planned_end_date and actual_end_date = null	Reminder	Objective should end today
Achievement Objective	The day after this date and Actual_end_date equals null	Missed date	Missed achievement objective end date
Achievement Objective	The day before this date	Reminder	Objective/Services review
Achievement Objective	This date plus 90 days	Reminder	Follow up
Achievement Objective	This date plus 120 days	Reminder	Follow up
Customer/Services	Today's date = Planned_start_date and actual_start_date = null	Reminder	Service should start today
Customer/Services	Today's date = Planned_end_date and actual_end_date = null	Reminder	Service should end today
Customer/Services	The day after this date and Actual_end_date is null	Missed date	Service should have ended.
Customer/Services	The day before this date	Reminder	Service review
Customer/Services	The <60th> day after the last actual end date for all services and activities, plus any hold days that fall after the date of last service or activity. <60th> is configurable	<pgm> exit candidate <pgm> is replaced with name of Federal program</pgm></pgm>	No recent <pgm> services or activities <pgm> is replaced with name of Federal program</pgm></pgm>
Customer/Services	<90> days after the latest c- time for activities or actual end date for services, plus any hold days that extend the date. <90> is configurable	<pgm> Soft Exited <pgm> is replaced with name of Federal program</pgm></pgm>	Exited due to no <pgm> services or activities in the past &lt;#&gt; days. <youth> <pgm> is replaced with name of Federal program. &lt;#&gt; is replaced with the number of days before a program is soft exited. <youth> is replaced with "**Achv Obj End Date Set For WIA Youth" when an end date for an achievement objective is set for a WIA Youth Enrollment.</youth></pgm></youth></pgm>



Tab	Trigger	Event_Name	Event_Description
Customer/Services/ Enrollments	If the Soft Exit process closes an enrollment that has previously been exited in a different calendar quarter and also has manual outcome field information filled in.	Review Prior Exit w/Manual Outcomes	<pgm> Enrollments has been Soft- Exited. Previous exit date-dependent manual outcomes should be confirmed. <pgm> is replaced with the name of the Federal program.</pgm></pgm>
Customer/Services Literacy/Numeracy	This date plus 300 days.	Reminder	Post Test should be given.

7.8.4.4.2.1.1. Normal inbox items (reminders and missed dates) for services shall be suppressed for SS/IO services.

- 7.8.5. If a staff member does not have an active status, the application will forward associated Inbox items to that staff member's active supervisor.
  - 7.8.5.1. If that supervisor does not have an active status, the application will forward the Inbox items to another active supervisor within that supervisor's office by lowest ID number.
    - 7.8.5.1.1. If there are no active supervisors within that office, the application will return to the original staff member, the Inbox item will not be created and an error will be logged.
- 7.8.6. The Soft Exit Reminder notice shall be configurable by program so it is not sent to Employment Services staff.
- 7.8.7. The Soft Exit Update notification shall be configurable by program so it is not sent to Employment Services staff.



#### SECURITY AND STAFF MODULE

# Individual security levels for each module appear in the bottom right corner of your screen.

#### **SECURITY** is implemented on two (2) levels:

- PROCESS LEVEL SECURITY imposes restrictions on the types of available transactions and on the buttons available to the user.
  - Delete authority to delete information/records (highest level of security)
  - Add (a.k.a. Insert) authority to add new information/records
  - Change (a.k.a. Update) edit existing information/records
  - View (a.k.a. Select) view information/records (view or higher is granted Search authority)
  - None none of the above
- TAB LEVEL SECURITY imposes restrictions on specific window pages (tabs) that user can access.
  - Unavailable pages (tabs) are grayed-out. When these are grayed out staff do not have access to perform the function.

**STATUS BAR** – at the bottom of page, displays the user logged in, the office, tab security level and the current date of log in.

#### **STAFF MODULE**

#### I. STAFF DETAIL

**STAFF DETAIL** is the first screen opened in EKOS, Tabs included are:

- **INBOX** Provides current list of appointments and event reminders and events. Appointments are generated using the Schedule button function in Customer Detail/Employer Detail (Contact Info) modules.
- **REFERRALS IN** lists customers that have been referred to the agency/office of the currently logged-in staff person (IA Referrals go to partner offices to all staff)

#### II. STAFF PREFERENCES

**STAFF PREFERENCES** allows users to change password and office logged into

OFFICE – If you work in multiple offices you need to change offices. If the offices you
work in are not listed in your "Change Office To" drop down list the EKOS security
contact for your location needs to email <u>EKOS.PROJECT@KY.GOV</u> and request the
additional offices to be added in your preference choices.

# (There is an Activity Report that shows individuals staff activities and an Employer Activity Report)

**III. PASSWORD** – Password should be changed every month or quarter for security purposes.

#### COMMON MEASURES AT-A-GLANCE

#### ADULT MEASURES

#### Entered Employment Rate (EER)

Measure: Of those who are not employed at participation, the percentage of individual's employer in the 1st quarter after program exit

- Includes only those not employed at participation.
- Entry to employment is based on wage record data and other administrative data sources.
- Employment status at the start of participation is self-reported by jobseekers.

#### Employment Retention Rate (ERR)

Measure: Of those who are employed in the first quarter after the exit, the percentage employed in the 2<sup>nd</sup> and 3<sup>rd</sup> quarter after exit

Of those employed in the 1<sup>st</sup> quarter after exit, measure applies to individuals that were
not employed at the start of participation, as well as those who were employed at the
start of participation.

#### Average Earnings (AE)

Measure: Of those adult participants who are employed in the first, second, and third quarters after the exit quarter

 Total earnings in the second quarter plus the total earnings in the third quarter after the exit quarter divided by the number of adult participants who exited during the quarter.

#### COMMON MEASURES Includes Exits – Measures – Reporting

ETA (Employment & Training Administration) – Adopted common measures methodology for the calculation of the

- Entered Employment (EER) those who are not employed at date of participation and become employed in first quarter after exit.
- Employment Retention (ERR) those employed in first quarter after exit quarter, the percentage of adult participants employed in 2<sup>nd</sup> and 3<sup>rd</sup> quarters after exit
- Average Earnings (AE) those adult participants who are employed in the 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> quarters after the exit quarter.

#### Individuals who are employed at the date of participation are excluded from EER.

ETA will continue to collect the pre-program earnings, as well as other information on participants, and supplement this measure with data on Average Earnings when describing program outcomes.

WIA (Workforce Investment Area) - Performance accountability system for

- 1. WIA Adult
- 2. Dislocated Worker
- 3. Youth Program
- 4. Trade Act
- 5. Jobs for Vets Act
- 6. Labor Exchange (OET) Wagner Peyser Act
- Common Measures reporting system calculates performance outcomes based on exit quarters
- Exit occurs when a participant does not receive a service funded by the program or partner program for 90 consecutive calendar days and is not scheduled for future services.
- The date of exit is applied retroactively to the last day on which the participant received the last service
- This is a called a "Soft Exit"
- A job seeker can exit four (4) times in one year (i.e. There are four (4) 3 Month Quarters in a year)

- (1) EE (Entered Employment, How many people went to work) Not employed at participation, the number of adult participants who are employed in the 1<sup>st</sup> quarter after program exit <u>divided</u> by the number of adult participants who exit during the quarter. (Individuals who are employed at the date of participation are excluded from this measure and programs will not be held accountable for these individuals under this measure) (Individuals who, although employed at date of participation, have either received a notice of termination of employment or whose employer has issued a Worker Adjustment Retraining Notification (WARN) or other notice that the facility or enterprise will close, or who are transitioning service members are considered <u>not employed</u> at the date of participation and are included in the performance measure.
- (2) ER (Employment Retention, Stayed Employed) The number of adult participants who are employed in <u>both</u> the second and third quarters after the exit quarter <u>divided</u> by the number of adult participants who exit during the quarter (Employment at the date of participation is based on information collected from the individual, not from wage records)
- (3) AE (Average Earnings, What did they earn) Adult participants who are employed in the first, second <u>and</u> third quarters after the exit quarter. Total earnings in the second quarter <u>plus</u> total earnings in the third quarter after the exit quarter <u>divided</u> by the number Of adult participants who exit during the quarter.
- Outcome exclusions that apply to WIA Adults, Dislocated Workers, Wagner-Peyser, and Vets
  - Institutionalization
  - Health/Medical or Family Care
  - Reservist called to active duty
  - Deceased
  - Relocated to Mandated Residential Program

Any partner that contributes to a positive outcome in Common Measures gets credit. It's an all-for-one goal. EKOS is a One Stop System used in combination with all partners to reach positive performance. Reports are sent to DOL

May have 4 Common Measure Enrollments within a year (9002 Activities are Common Measure Performances)

#### Employ Kentucky Operating System (EKOS) Reportable Participant Activities

#### Labor Exchange Reportable Activities:

There are specific *activities that must be reported* for your participants to ensure they are registered with Employment Services and are enrolled in Labor Exchange federal performance measures and Common Measures. These activities are all those identified as Common Measures Enrollment.

#### Labor Exchange Non Common Measures Enrollment Reportable Activities:

Another category of activities listed in the Labor Exchange Category that do not generate a Labor Exchange enrollment for your participant are the Self-Service activities and others identified in this category. However, these activities do allow for reporting and tracking that can be used for state and local reporting and should be reported for your participants.

#### Employment and Training Reportable Activities:

There are some Common Measures Enrollment activities included in the Employment and Training Category. However not all activities listed in this category will generate a Labor Exchange Enrollment for your participant.

#### State Specific Activities:

Activities included in the State Specific Category allow for reporting and tracking of One-Stop activity and/or for specific Program related activities. Reporting these activities will not generate a Labor Exchange enrollment for your participant.

If you have any questions or problems relating to reporting activities for participants please contact the EKOS Support Team at <u>EKOS.Project@ky.gov</u>.

### **To View Participant Activities Definitions Click on Link Below**

http://my.edcabinet.ky.gov/EKOSNewsletters/EKOSParticipantActivities0508.pdf

#### **To View Employer Activities Definitions Click on Link Below**

http://my.edcabinet.ky.gov/EKOSNewsletters/Definitions\_Employer\_Activities\_May07.doc

2/18/2009

#### Office of Employment and Training Division for Field Services Office Activity Report FROM 01/01/2009 TO 02/18/2009

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									Veteran			l						
		Total	Female	Male	Male over 21	Profiled UI	Vet Total	Vietvet	Disab Vet	Special Disabled	Other Elig	Minority	Migrant	Disability	Disadv	Dislocated Worker	Welfare	Youth
LOCAL OFF Staff Nam	TICE :							•							•			
	Labor Exchange																	
-	Assessment	4	2	2	2	2	4	0	0	0	0	3	0	1	0	0	0	0
_	Assessment Interview, Initial Assessment	4	2	2	2	2	4	0	0	0	0	3	0	1	0	0	0	0
-																		
-	Case Management	4	2	2	2	2	4	0	0	0	0	3	0	1	0	0	0	0
-	Assigned Case Manager (Vets Only Service)	4	2	2	2	2	4	0	0	0	0	3	0	1	0	0	0	0
-																		
-	Informational/Self-Service	46	4	42	42	34	46	11	4	4	0	35	0	10	0	1	0	0
-	Utilizing Resource Rooms	46	4	42	42	34	46	11	4	4	0	35	0	10	0	1	0	0
-	Job Search Assistance	102	14	87	87	70	102	27	22	6	0	62	0	16	0	1	0	0
_	Job Development Contact	59	6	53	53	40	59	18	15	4	0	35	0	9	0	0	0	0
	Workforce Information Services Staff Assisted (LM	43	8	34	34	30	43	9	7	2	0	27	0	7	0	1	0	0
-	Match	426	16	409	409	332	426	117	60	24	0	287	0	81	2	0	2	0
-	Match	426	16	409	409	332	426	117	60	24	0	287	0	81	2	0	2	0
	Other Reportable Services	70	9	60	60	49	70	20	19	3	0	43	0	10	0	0	0	0
-	Other reportable services (ES, DVOP, LVER)	70	9	60	60	49	70	20	19	3	0	43	0	10	0	0	0	0





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EmployK

									Veteran									
	·	Total	Female	Male	Male over 21	Profiled UI	Vet Total	Vietvet	Disab Vet	Special Disabled	Other Elig	Minority	Mgrant	Disability	Disadv	Dislocated Worker	Weifare	Youth
LOCAL	OFFICE																	
Job	Search Results																	
	Job Referral	170	58	112	105	107	24	6	2	3	0	106	0	25	3	1	0	10
	Interstate Job Referral	70	32	38	36	38	6	1	0	3	0	42	0	11	1	0	0	2
	Referred to Job FT Regular (Over 150 Days)	63	19	44	43	44	16	5	2	0	٥	42	0	10	2	1	0	4
	Referred to Job FT Short-Term (1 - 3 Days)	5	2	3	2	4	0	0	0	0	٥	3	0	1	0	0	0	1
	Referred to Job FT Temporary (4 - 150 Days)	15	4	11	11	10	2	0	0	0	٥	7	0	1	0	0	0	0
	Referred to Job PT Regular (Over 150 Days)	8	1	7	5	3	0	0	0	0	0	6	0	0	0	0	0	2
	Referred to Job PT Temporary (4 - 150 Days)	9	0	9	8	8	0	0	0	0	٥	6	0	2	0	0	0	1
	New Customer	159	62	97	84	6	10	6	6	0	0	125	0	9	2	0	0	25
	New Job Seeker - Staff Assisted	159	62	97	84	6	10	6	6	0	٥	125	0	9	2	0	0	25

# Performing Interactive Voice Response (IVR) Transactions

The AOSOS Interactive Voice Response (IVR) functionality in the Customer module allows you to select a pre-defined IVR script to be associated with the customer information for one or more selected customers, and stored in an IVR table for retrieval by an IVR vendor. This functionality is used to remind customers of scheduled training sessions, or to request updates to their current status. If you select multiple customer records, a separate transaction will be recorded for each customer. Only one IVR script can be selected for a list of customers. IVR scripts are defined using the AOSOS Admin application (see your *AOSOS Admin Guide* for details) and stored in a state-configurable domain table.

To initiate an IVR transaction for one or more customers:

- 1. Perform a customer search and sort your search results as desired.
- Select the list entries for the customers for whom IVR transactions will be created.
  - a. To select a sequential group of search results from your list:
    - 1.) Click to highlight the first record in the desired group.
    - Hold down the Shift key, and click on the last record in the desired group. All records in the selected range will be highlighted.
  - b. To select a non-sequential group of search results from your list:
    - Hold down the Alt key, and click to highlight each record in the desired group.
  - c. To select all customer records in your list:
    - Click on the Select All button. All list entries will become highlighted to indicate that they are selected.

 Click the IVR button at the bottom of the Customer Search window. The IVR Script Selector pop-up window (Figure 2-33) will appear.

IVR Script Selection		R
Script	🐱 Staff Phone #	
	Save Cancel	

Figure 2-33. The IVR Script Selector Pop-Up Window

- Select a pre-defined IVR script by clicking on the arrow button (

   ) and
   selecting the desired script name from the drop-down list.
- 5. To assign a staff member's phone number to the transaction(s), enter the phone number (including the area code) in the Staff Phone # field. If no phone number is entered in this field, the phone number of the currently signed-on staff person's office will be assigned to each transaction by default.
- Click Save to save the transaction(s), or Cancel to cancel the operation and return to the Customer Search window.



If a selected customer does not have a phone number assigned to it, the customer's IVR transaction will be disregarded. The user is not given any warning regarding this failure.

For a full reading of each scrip and the results codes for the outbound calls Click this link http://my.edcabinet.ky.gov/ekosinfo/EKOSIVRScripts.pdf

For viewing the results of your IVR calls Click this link http://my.edcabinet.ky.gov/ekosinfo/ivr\_results.htm

## Performing Customer Correspondence

The **Correspond** button, located at the bottom of the Customer Detail window, allows you to generate customer correspondence through the use of Microsoft<sup>®</sup> Word<sup>nt</sup>'s Mail Merge, template generation, and word processing functionality. AOSOS exports data required by Mail Merge. Microsoft Word allows the generated correspondence to be printed, faxed, and/or emailed, as necessary.

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You must have Microsoft<sup>®</sup> Word<sup>™</sup> installed on your client machines in order to use the AOSOS Correspondence functionality.

To initiate customer correspondence from the Customer Detail window:

1. Click the Correspond button at the bottom of the Customer Detail window.

See Chapter 7, AOSOS Correspondence, for further instructions on performing AOSOS customer correspondence.

## **Correspondence Help**

The AOSOS **Help** menu provides a link to the OSOS Correspondence Help web site, which allows you to quickly obtain the necessary correspondence and data source templates. This site also includes instructions for placing the correspondence templates in the proper directory, modifying a client machine's autoexec.bat file, and creating custom correspondence templates. To launch the OSOS Correspondence Help web site:

 Click on the Help menu in the menu bar, and select Correspondence Help from the menu. A client browser window will open and navigate to the Correspondence Help web site (Figure 7-1).



Figure 7-1. The OSOS Correspondence Help Site

# Initiating Correspondence

AOSOS Correspondence can be initiated (using the **Correspond** button) from several locations within the AOSOS application, including the:

- Customer Detail window (customer correspondence)
- Customer Comprehensive Assessment window (customer correspondence)
- Customer Search window (customer correspondence)
- Employer Detail window (employer correspondence)
- Employer Search window (employer correspondence)
- Job Order Detail window (employer and referral correspondence)

<del></del>	
NOTE	
NOTE	

Employer correspondence is **automatically** initiated from the Job Order Detail window after a job order is created and successfully saved with a status of **Open**. The purpose of this is to notify the employer that their job order has been entered into AOSOS. A copy of the job order will be appended to the correspondence. The template used for this type of correspondence is called **Employer JO Thank You.dot**.

This type of correspondence uses the data items included in the Job Order Save Summary data source file (JobSaveSummaryDataSrc.doc).

Note that this will only occur when a job order is **first** created and saved with a value of **Open**. If you update and save the job order later, correspondence will not launch automatically.

- Provider Detail window (provider correspondence)
- Provider Search window (provider correspondence)

If you initiate correspondence from within the Customer, Employer or Provider Search window, you have the ability to select several recipients before clicking the **Correspond** button. If you do so, the Microsoft Word correspondence document will, after the Mail Merge operation, contain multiple copies of the selected correspondence type, separated by page breaks within the document.

All other correspondence methods will generate a single copy of the selected correspondence type.

accesses.	1
NOTES	

AOSOS Employer and Provider correspondence can only be conducted with employers and providers that have at least one contact person designated in the system. Use the **Contact Info** page of the Employer or Provider Detail windows to add a contact before attempting to correspond with the employer or provider.

Before initiating correspondence from the Employer or Provider Search windows, you must first display the contact information in the search results list using the Show/Hide Contacts button.

## **Completing Correspondence**

Once correspondence has been initiated, a correspondence template must be selected. Microsoft Word will display the template and the Mail Merge operation will be automatically conducted. The correspondence can then be modified and sent, as desired.



This section contains enough Microsoft Word instruction to perform the basic correspondence operation. For complete information on Word's Mail Merge, word processing, printing, fax, and/or email functionality, consult your Microsoft Word user documentation or online help.

1. After correspondence has been initiated, the Pick a Document Template pop-up window (Figure 7-2) will appear.



Figure 7-2. The Pick a Document Template Pop-Up Window

- Using this window, browse (if necessary) to your client machine's C:\Program Files\Microsoft Office\Templates directory and locate the template (.dot) file that you wish to use.
- Click on the template file (it will become highlighted to indicate that it is selected) and click the **Open** button. Microsoft Word will start (if necessary) and display the selected template (see Figure 7-3).





If necessary, modify the displayed template as desired.

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NOTE	

Some AOSOS correspondence templates contain text that is enclosed within single angle brackets (e.g., <text>). This text must be replaced manually, either before or after performing Mail Merge. This data is not part of the exported AOSOS data source. 4. On your Microsoft Word Menu select **Tools / Letters and Mailings** and select (Show Mail Merge Toolbar)

5. Click on the Merge to New Document icon



## 6. Select ALL and click the OK Button

Merge to New Document	×
Merge records	-
(° All	
C Curr <u>e</u> nt record	
C Erom: Io:	
OK Cancel	



Some AOSOS correspondence templates contain text that is enclosed within single angle brackets (e.g., <text>). This text must be replaced manually, as this data is not part of the exported AOSOS data source.

# Performing Inter-Agency Referrals

The **I.A. Referrals** button, located at the bottom of the Customer Detail window, launches the Inter-Agency Referral pop-up window which allows you to refer an *active* customer to another agency, or to another office within the same agency. When an interagency referral is performed, the referral will appear on the Referrals In page of the Staff window for the destination agency, where it can be accepted or denied. Refer to the AOSOS Staff Services User's Guide for information on processing interagency referrals.

To perform an interagency referral for the displayed customer record:

 Click the I.A. Referrals button at the bottom of the Customer Detail window. The Interagency Referral pop-up window (Figure 3-48) will appear.

Inter-Agency Referra				
SSN	117-11-1114 OSOS ID NY930333190			
Last Name	QA_RESERVE			
First	Reserve MI			
Referral Date	08/04/2006 Date of Birth 10/10/1970			
Phone				
Address	QA Reserve please do not use			
City	syracuse			
State	New York Zip 13202			
Referring Staff	Professional, Workforce			
Referring Agency	DEPARTMENT OF LABOR Change			
Referring Office	Buffalo			
Phone	Ext			
<ul> <li>Destination Agency</li> </ul>	Select			
<ul> <li>Destination Office</li> </ul>	Office			
Appointment Date	Appointment Time			
Reason Referred				
Save Print Cancel				

Figure 3-48. The Inter-Agency Referral Pop-Up Window



The customer's detail information will be displayed in the display-only fields in this window. Your name, and office information will be displayed in the referring staff, agency, and office fields.

- Click the Change Office button next to the Referring Agency and Office field to change the Referring Agency, and Office. The WIB-Agency-Office Select pop-up window (Figure 3-49) will appear.
  - a. Select the desired office from the hierarchy shown. Click **OK** to return the selected value to the I.A. Referral page and close the window.
  - b. Click Clear to clear the Referring Office value on the I.A. Referral page and close the window.
  - Click Cancel to close the window and leave the referring office unchanged.

WIB - Agency - Office Selector		
Capital District A Cayuga-Cortland Chautauqua Finger Lakes GLOW Jefferson-Lewis Oswego Department of Labor 2 I NJ Test Office St. Lawrence		
Keyword(s)	Search	OK Clear Cancel

Figure 3-49. WIB - Agency - Office Selector pop-up window.

- Enter your 10-digit phone number, including the area code, in the Phone field. The number will be formatted by the system (i.e., separators, such as dashes, are automatically inserted), so enter only numeric characters.
- If necessary, enter your phone extension number (up to 5 digits) in the Ext field.
- 5. Select the referral's destination agency and office as follows (required field):
  - Click the Select Office button to the right of the Destination Agency and Office fields. The WIB-Agency-Office pop-up window (Figure 3-10) will appear.

WIB - Agency - Office Selector		
Capital District A Cayuga-Cortland Chautauqua Finger Lakes GLOW Jefferson-Lewis Oswego Department of Labor 2 Department of Labor 2 St. Lawrence		
Keyword(s)	Search	OK Clear Cancel

Figure 3-50. The WIB-Agency-Office Selector Pop-Up Window

When it is initially launched, the window displays a list of state WIBs.

- b. Locate and click on the WIB name that includes the desired destination agency location. The selected WIB will expand into a tree structure, listing all agencies that are located in that WIB.
- c. Locate and click on the desired destination agency name within the window's tree structure. The selected agency will expand into a tree structure, listing all of that agency's locations in the selected WIB.
- d. Locate and click on the desired agency location within the window's tree structure. The location will be highlighted to indicate its selection.
- e. Click the **OK** button. The pop-up window will disappear, and the selected values will be displayed in the **Destination Agency** and **Office** fields.
- 6. In the Appointment Date field, enter the date (in mmddyyyy format) on which the customer is to meet with the destination agency's representative. The number will be formatted by the system (i.e., separators, such as slashes, will be automatically inserted), so enter only numeric characters.
- In the Appointment Time field, enter the time (in hhmm am/pm format) at which the customer will meet with the destination agency's representative. The number will be formatted by the system (i.e., separators, such as colons, will be automatically inserted), so enter only numeric characters and am or pm.
- 8. In the **Reason Referred** field, enter text describing the reason for the customer's interagency referral. (This is a required field)
- Click the Save button to save the interagency referral, or click Cancel to cancel the operation and return to the Customer Detail window.

### Printing Inter-Agency Referrals

To print the Inter-Agency Referral:

- Click the **Print** button on the bottom of the Inter-Agency Referral popup window. A Print Preview pop-up window will appear, allowing you to view the Inter-Agency Referral as it will be printed.
- In the pop-up window, click the **Print** button. The list will be sent to your configured print queue. To cancel the operation, click **Cancel**.
### Performing Matches from the Customer Module

 Using the Customer Search window, locate the desired customer for the Match operation (see Chapter 2, AOSOS Customer Search for instructions) and display it in the Customer Detail window (see Figure 4-6).

### OR

Create and save a new customer record (see **Chapter 3**, **AOSOS Customer Detail** for instructions) using the Customer Detail window (see Figure 4-6).

 If desired, display the Objective page of the Customer Detail window and click on one of the entries in the O\*Net Titles list box. The selected O\*Net title will be used to pre-populate the O\*Net Title field on the General Info page of the Job Order Search window.



If you **do not** select an O\*Net title from the customer's record before starting the Match operation, the system will use the first title listed in the **O\*Net Titles** list box to pre-populate the **O\*Net Title** field in the Job Order Search window.

 In the Customer Detail window, click the Match button (see Figure 4-6). The Job Order Search window will appear. Several Job Order Search window fields will be pre-populated with criteria from the customer record. (see Figure 4-7).

Г	SSN	Vet	Status	Seeker Name	Objective
F	032-54-6876	Yes	Active	Akkineni, Harish	E05648
	564-97-6846	Yes	Active	Akkineni, Kamalakar	E09002D
	657-87-3786	Yes	Active	Akkineni, Neelesh	E05648
Г	498-78-4541	No	Active	Akkineni, Amarender R	EQ
Г	435-73-8745	No	Active Я	Akkineni, Bhoopal	E05627
	435-87-8435	No	Active	Akkineni, Charan R	EO
Г	465-37-4874	No	Achive	Akkineni, Damodhar	EMP OBJ
E	078 08 7007	hio	fatters	Aldioant Llamioan	
	25 • S	earch	Clear Deta	il Print List Save Srch Assign to List M	atch Refer Activity Post a Note Correspond IVR New
Cu	Storner Sec	arch	-	CUSTOMER PRO Customer Search Customer D	VIDER EMPLOYER STAFF HELP etal Comp Assess Services
	Customor			Akkineni, Kamalakar	SSN: 564-97-6846 OSOS ID: NY930333215 1 of 1
	Sustomer			Gen. Info Addri Into Objective W	ork list. Ed.Lic Skills Saved Searches Activities Comments Tests CB 1 cuztomars > >>
					Status Active      Job Seeker Active     Password Galeearved     First Name Kondakar     Gender Male     Gender Male     State New York     Csunty Orondaga     Vietro     Vietro
				Phone Email •U.S. Cilizen 🔽	Att Fax Education & Employment Education Level GED Status
				Customer Assignment Gtaff Assigned Annopunedig, Madhavi VVIB Assigned Oarvago Agency DEPARTMENT OF LABOR Office Sylacuse UI Claimant	Charge Registered 05/09/2006 Origin Stall Charge Profiled Diffice Profiled Profiled Profiled Schedule Appointment
Cli	ck the Ma	tch l	outton.	Save Match Services Comp	Assess Activity I.A. Referrals Conespond IVR Betan to Srch Post a Note Tag

The Job Order-Search window will appear (see Figure 4-7). Several Job Order Search fields will be pre-populated with criteria from the Customer record.

Figure 4-6.

Job Order Search window, with search — criteria from the customer record.

¢	Full Time Yes  Part Time Part Time Regular Yes Seasonal Femporary Fond Term Hours Per Week Education Regulred Experience Regulred Y Public Transportation	First Shift Second Shift Third Shift Rotating Shift Shift Shift Shift Varies Shift Varies Shift Varies	Startin Maior	g Pay num num Unit			nefits 0000 • He • V: • Si • He • Re • Co • Co	ealth In ental In acation ck Leav olidays ethreme lothing/ hild Ca	<u>surance</u> surance ve ont/Pens Uniform re	1 Sion Pla I Allows	ance
	Company	Title	Orden≢	Date	Status	Age	OR/MD	#D	#R	#0	<b>#</b> H

Use the Job Order Search window to search for matching jobs for the customer.

Figure 4-7.

 If necessary, enter, change, and/or delete the search criteria on the various tabbed pages of the Job Order Search window (see Chapter 5, AOSOS Job Order Search, in the AOSOS Employer Services User's Guide for details).



If you click the Job Order Search window's **Clear** button while performing a Match operation, Match mode will be cancelled. If you wish to remove or change search criteria for your Match operation, you should manually alter the necessary fields. Do not use the **Clear** button to clear the fields.

- To limit the size of your result set, click on the arrow button ( ) in the Search Limit field, and select the desired result set size (25, 50, or 100) from the drop-down list.
- To activate the search, click the Search button. Your search results will appear in the Search Results list below the Job Order Search window fields (see Figure 4-8).

- a. At this point in the Match operation, if your Job Order Search returns any search results, the Save Search button will become active. This button allows you to save the search parameters used in this Match operation so that the search can be performed again later. All saved searches will be listed on the Saved Searches page of the Customer Detail window for later use. See Saved Searches, on page 4-12, for details on Saved Searches.
- 7. To match one or more job orders to the customer, select the desired list entries and click the Match button. The customer will be listed on the Matches page of each selected job order's Detail window (Figure 4-9). A Match activity will also appear on the Customer Detail Activities page and the Service History page (in the Services module) for each matched job (see Figure 4-10).

Older V		Order Status	*			Originati	on			
EmpJob Title m		Emp Req #			Jul	b Order D;	ate		-	
Source (State)		Source (Fed)	-	¥	Las	st Open Da	ate		-	
O*Net Title									0"Ne	* Tit
Category	8	<ul> <li>Image: A set of the set of the</li></ul>	Staff Assign	ed					Che	ango
WIB		·	Off	ice				V		
Employer Information	c	ontact Information			Jo	b Locatio	n —			
Employer ID		Contact Last Name				City				
Company Name		Suppressed	~		¢	ounty				
Ownership	× [	🗌 Email 🔛 UR	L 🗌 Fax			Zip		Radiu	s	
NAICS	[	🗌 Phone 📃 Ma	i 🗌 in P	erson						
Company	Title	Order#	Date	Status	Age	OR/MD	#0	#R	#0	#
Funky Town Co.	Operations Manager	NY0006086	06/09/2008	Open_	10	ADSOS -		1_	<u>1</u>	2
	25 v C v C	Data Data	c c 1	LA in	1	Mart I	1.6			
	25 👻 Search Clear	Detal Print List	Save Search	Assign	to List	Match F	lefa			



- a. To review job orders before performing any matches, highlight one or more of your search results and click the **Detail** button. The Job Order Detail window will appear.
- b. Review the job order as necessary.

- c. If you decide to match a job order after reviewing it in the Job Order Detail window, click the **Tag** button at the bottom of the window. The button's label will change to **UnTag**. To deselect the job order, click the **UnTag** button.
- d. Click the Return to Search button. The Job Order Detail window will disappear, returning you to the Job Order Search window. You will still be in Match mode. If you tagged any job orders in their Job Order Detail windows, their search result list entries will be highlighted.
- e. Click the Match button. The customer will be listed on the Matches page of the job order's Detail window (Figure 4-9). A Match activity will also appear on the Customer Detail Activities page and the Service History page (in the Services module) for the matched job (see Figure 4-10).



Figure 4-9.

Customer Search 🥂 🦲 🕻						
	Customer Detail	Comp Assess	Services			
Akkineni, Kamalakar	S	SN: 564-97-6846	OSOS ID: NY930	333215	1 of 1	
	Sector Street and Lot		Activities			-
<	Djective   Work Hist.   Ed.	Lie Skills Saved Se	sarches Postanta	Comments Tests	LB 1 Cuztomars	2 22
Астічну	ACTIVITY LI BT	e Unice	Statt	Employer	JODID	
Match	05/09/2006	Syracuse	Annapureddy, Na	d Acme Explosives	NYODD5079	
Placement FT Temporary (	4 -150 days)05/09/2006	Syracuse	Annapureddy, Na	d Acme Explosives	NYODD5079	
New Job Seeker - Staff Ass	risted 05/08/2006	Syracuse	Annapure dy, Ma	d		
Referred to Job FT Tempor	rary (4 - 150 05/08/2006	Syracuse	Annapura ay, Na	d Acme Explosives	NYODD6079	
Job Cosching	0510812006	syracuse	Annapuryody, Ma			
Placed in Training (Job Cor	rps) 0412512006	Syracuse	Annapyreody, Ma	0		
Li commun Measures Enrolla	nt 04/19/2006	Curecuse	Annabureddy, Ma	0		
Labor Enclange Enformmen	n 0411912000	Cwantee	Annapureddy, Ma	d		
History page in Services modu	n the ule.	cloc Activity   Print L	List Detai	, mildow		×
Save Match Sery	gices Comp Assess Act	ivity I.A. Refemals C	Correspond IVR <u>R</u> e	etum to Sich   Post a	Note Tag	
Save Match Sey	customer Search	ivity LA Referrals ( MER PROVI Customer Det	Der EMPL all CompAss	elum to Sich   Post a OYER   S rees   Ser	Note Tac TAFF vices	HELP
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Figure 4-10.

#### Outcomes

The Outcomes page of the Services window is used to record required information for the period following exit of a customer's program enrollments (e.g., WIA, Trade Act). Outcome information for an enrollment period can be entered *before or after* its exit.

A customer's enrollment is exited using the **Enrollments** page of the Services window. Clicking this button will close the customer's current enrollment, and begin the Post Tracking period for that enrollment.

If fund allocation for the customer occurs during the Post Tracking period, another enrollment is created. The new enrollment must be managed separately from the original one (i.e., it must be exited and tracked separately).

Each of the customer's program enrollment periods are displayed in the list below the outcome fields on this page. If the selected enrollment is a parent enrollment, the necessary fields for the child enrollments will be displayed and enterable. Child enrollments can not be updated directly.

#### Viewing the Outcomes Page

To access the Outcomes page:

1. Click on the Outcomes tab. The Outcomes page (Figure 6-21) will appear.

Age	ncy Info Achieveme	nt Objective	Services	Service History	Enroliment	te	Outcomes	Comments Audit		
Г	Employment	-			1	Γ	Employed in	Quarter after Exit		
C	>*Net Title			0.	Net Titles		4-40	Employed after Exit	Determination Me	thod
	Recalled By La	ayoffEmploy	er		•		1st Quarter		<u></u>	-
	Employment Tra	aining Relate	d		•		2nd Quarter	<b></b>		-
	EmploymentN	lon-Tradition	al		-		3rd Quarter	<u>•</u>	<u> </u>	-
E	Employed in Federal (	Contractor Jo	b 🖃				4th Quarter	•		•
							5th Quarter	<b>•</b>		•
	Education & Training					1		-		
	Education & Franning	n Level at E	it		-				-	
	Entered Advs	nced Trainin	0							
	Entered P	ast-Seconda								
	Lintereuro	ad Oradanti	y							
	Attair	red Credenti							•	
	Туре	e of Credenti	31	_						
		Date Attaine	dļ							
	Program Type	Enr. Date	E	Enroliment Offic	ce		Exit Date	Exi	Office	1
	WIA	03/13/2000	Buffalo							
	Trade Act	04/16/2000	Buffalo				06/25/2005	Buffalo		
	Common Measures	03/13/2000	<u>Buffalo</u>					-		-P
	Labor Exchange	12/11/2004	Elmira				12/14/2004	Buffalo		
	Labor Exchange	04/01/2005	Buffalo				06/17/2005	Buffalo		
					Print List				/	/
		<u>S</u> ave C	ustomer Detai <u>l</u>	<u>C</u> omp Assess	Post a Note	•	Check Labor	Market Information		

To enter outcome information for a program enrollment, select the desired registration period from this list and enter outcome data in the fields above.

Figure 6-21. The Outcomes Page of the Services Window.

### Enrollments

The Enrollments page of the Services window is used to manage exits for a customer's various program enrollments (e.g., Common Measures, WIA, Trade Act, Welfare to Work, and other state-specific funding programs). Each of the customer's program enrollment periods are displayed in the list at the bottom of this page. Clicking on a program enrollment entry in this list will display its detail information in the **Enrollment Info** and **Exit Info** fields above the list.

Common Measures, WIA and Trade Act enrollments are initiated by using the Services page to allocate WIA or Trade Act funds, respectively, to fund a customer's services. Labor Exchange enrollments are initiated by adding Labor Exchange Activities in the Customer Module.

### Viewing the Enrollments Page

To access the Enrollments page:

1. Click on the Enrollments tab. The Enrollments page (Figure 6-19) will appear.

	ienconjectivea jaervi	coa acreice matory	oucomes commen	ita   Augit	
Enrollment Info		(1)	Exit Info		
Program Ty	pe Common Measures		Exit Date		
Enrollment Da	ate 12/13/2000 Enrolle	ed in Education	Exit Reason		•
Enrolling Service Nan	ne Halp Using Self-Serv	ice Systems Place	3rd Otr Exclusion		
Enrolling Service Ty	pe Utilizing Resource Re	ooms	Exit Admin		
Enrolling Adm	nin Moore, Ed		Exit Office		
Enrolling Off	Ce Buffalo				
Staff Assist	ed Yes		Transaction Date		
Employment State	us Not Employed		Transaction Admin		
Holds			Transaction Office		
Start Date	End Date	Reason			
		<u>A</u>			
		-			
<u>_</u>	Add Hdr Delete				
Program Type	Enr. Date	Enrollment Office	Exit Date	Exit Office	
and the second se	A CONTRACTOR OF		and the second second	1446100739220151	
E WIA	04/02/2007 Buffalo		1		
WIA Trade Act	04/02/2007 Buffalo 12/13/2000 Buffalo				
WIA     Trade Act     Common Measures	04/02/2007 Buffalo 12/13/2000 Buffalo 12/13/2000 Buffalo				-
WIA Trade Act Common Measures Labor Exchange	04/02/2007 Buffalo 12/13/2000 Buffalo 12/13/2000 Buffalo 03/29/2007 Buffalo				
WIA Trade Act Common Measures Labor Exchange	04/02/2007 Buffalo 12/13/2000 Buffalo 12/13/2000 Buffalo 03/29/2007 Buffalo				
WIA Trade Act Common Measures Labor Exchange	04/02/2007 Buffalo 12/13/2000 Buffalo 12/13/2000 Buffalo 03/29/2007 Buffalo	Print List Eccelle	ment History		X
WIA Trade Act Common Measures Labor Exchange	04/02/2007 Buffalo 12/13/2000 Buffalo 12/13/2000 Buffalo 03/29/2007 Buffalo	Print List Eccell Detail Comp Assess Post a N	<del>ment Histony</del> ote Check Labor Market Inf	ormation	×
WIA Trade Act Common Measures Labor Exchange	04/02/2007 Buffalo 12/13/2000 Buffalo 12/13/2000 Buffalo 03/29/2007 Buffalo	Print List Eccel Dotal Comp Assoce Post a N	<del>nent History</del> ote Check Labor Market Inf	omation	X
WIA Trade Act Common Measures Labor Exchange	04/02/2007 Buffalo 12/13/2000 Buffalo 12/13/2000 Buffalo 03/29/2007 Buffalo	Print List Eccell Datal Comp Asease Post a N	ment History	iomation	
WIA Trade Act Common Measures Labor Exchange	04/02/2007 Buffalo 12/13/2000 Buffalo 12/13/2000 Buffalo 03/29/2007 Buffalo	Print List Eccelle Detail Comp Aseases Post a N Customer pr	rent Histony ote Check Labor Market Inf	iomation ts are listed	

information in the fields above.

Figure 6-19. The Enrollments Page of the Services Window

### Service History

The Service History page of the Services window provides a list of services that have been provided to the customer, and allows this list to be printed if desired. Detailed information can be viewed for each service using the **Detail** button. The Service History page lists the following types of services:

- Job Match/Referral
- 9002 Activities
- Provider Services
- InterAgency Referrals
- Labor Exchange Enrollment/Exit
- Trade Act Enrollment/Exit
- WIA Enrollment/Exit

### Viewing the Service History Page

To access the Service History page:

 Click on the Service History tab. The Service History page (Figure 6-8) will appear.

<	Agency Info Achievement Objectives Serv	lices Servic	e History Enrollment	s Outcomes Comments	s Audit Lit/Num Tes > >>
	Service	Date	Staff	Agency	Office
	Referred to Job FT Short-Term (1 - 3 Days)	06/15/2006	Workforce Profession	DEPARTMENT OF LABO	Buffalo
	New Job Seeker - Staff Assisted	05/01/2002	Charles Buchanan	DEPARTMENT OF LABOR	Elmira
	Assessment Interview, Initial Assessment	05/27/2005	Charles Buchanan	DEPARTMENT OF LABOR	Elmira
	Labor Exchange Registration	05/27/2005	Charles Buchanan	DEPARTMENT OF LABOR	Elmira
	Career Guidance	05/27/2005	Charles Buchanan	DEPARTMENT OF LABOR	Elmira
	Individual Employment Plan	05/27/2005	Charles Buchanan	DEPARTMENT OF LABOR	Elmira
	Match	06/15/2006	Workforce Profession	DEPARTMENT OF LABOR	Buffalo
V	PRSC3 Service#2 Name	05/01/2005	Charles Buchanan	DEPARTMENT OF LABOR	<u>Elmira</u>
	PRSC3 Service#2 Name	05/01/2005	Charles Bucharan	DEPARTMENT OF LABOR	Elmira
	PRSC3 Service#2 Name		Charles Bucharlan	DEPARTMENT OF LABOR	Elmira
	PRSC4 Service#b Name	05/15/2005	Charles Bucharan	DEPARTMENT OF LABOR	Elmira
	Inter-Agency Referral	06/15/2006	Workforce Profession	DEPARTMENT OF LABOR	Albany
	WIA Enrollment	09/01/2003	Tester2 Tester2	DEPARTMENT OF LABOR	Albany
	Labor Exchange Enroliment	06/15/2006	Workforce Profession	DEPARTMENT OF LABOR	Buffalo
	Labor Exchange Enrollment	09/01/2003	Charles Bychanan	DEPARTMENT OF LABOR	Elmira
	Common Measures Enrollment	09/01/2003	Tester2 Tester2	DEPARTMENT OF LABOR	Albany
	Common Measures Enrollment	06/15/2006	Workforce Profession	DEPARTMENT OF LABOR	Buffalo
	To view detail information about	ıta 🔔			
	service, click on the desired list	t entrv.			
	and then click the <b>Detail</b> buttor	,			
	and then click the Detail buttor	1.			*
		-> De	tail Print List		
	<u>S</u> ave Customer Detail	Comp Asses	Post a Noie Che	ck Labor Market Information	

Figure 6-18. The Service History Page of the Services Window

The Service History list displays the following information about each service:

### Service

This column displays the name of the service.

# Date

This column displays the date (in mm/dd/yyyy format) on which the service was assigned to the customer.

# Staff

This column displays the name of the staff person who assigned the service.

# Agency

This column displays the name of the agency through which the service was assigned.

# Office

This column displays the office in which the service was assigned.



If you have recently added or changed customer information using the Services module, that activity may not immediately be displayed on the Service History page. Exit and re-enter the Services module to view the most recent information on the Service History page.

### Customer List Participation

The **Customer List Participation** section of the Additional Info page provides a method for adding the displayed customer record to a customer list. This function can also be performed using the **Assign to List** button on the Customer Search window; see **Adding One or More Customers to a List** on page 2-44 of **Chapter 2**, **AOSOS Customer Search**. You can also remove customer records from lists using this functionality.

The **Customer List Participation** box displays list names for each list to which the currently displayed customer belongs.

To add the currently displayed customer record to a customer list:

 Click the Assign to List button beneath the Customer List Participation box. The List Management window (Figure 3-14) will appear.

List	Management						
	Office	Staff	List Name	Created	Statewide	Shared	
							0
	ookup List	<ul> <li>Show On</li> <li>Show Lis</li> <li>Show All</li> </ul>	Indivi ly My Lists its in My Office Office Lists	dual Lists O O	Show Statewide Show Individual I Show Both	Lists Lists	×
		Select Ca	ncel New List	Modily List	Delete List		

Figure 3-14. The List Management Window

The **List Management** window features two groups of radio buttons below the list box which allow you to define which lists will be displayed. You must select a single radio button option from each group of options.

The leftmost group of radio buttons includes:

- Show Only My Lists Selecting this radio button will display customer lists which are owned/administered only by the staff person that is currently logged in.
- Show Lists in My Office Selecting this radio button will display customer lists which are owned/administered by any staff person that is in the same office as the person that is currently logged in.
- Show All Office Lists Selecting this radio button will display customer lists which are owned/administered by any staff person in any office in the entire state.

The rightmost group of radio buttons applies to the **Statewide** flag, which can be selected for a list. This group of radio buttons includes:

- Show Statewide Lists Selecting this radio button will display customer lists for which the Statewide flag has been selected.
- Show Individual Lists Selecting this radio button will display customer lists for which the Statewide flag has not been selected.
- Show Both Selecting this radio button will display all customer lists, regardless of the status of the Statewide flag.
- 2. Select a radio button option from each group of radio buttons on this page.

- Click the Lookup List button. The corresponding saved list entries will appear in the list box above the radio buttons.
- Select a list by clicking on the desired entry in the list box. The selected entry will be highlighted to indicate that it is selected.
- Click the Select button at the bottom of the List Management window. The customer record will be added to the selected list.

Once a customer record has been added to a list, the list entry will appear in the **Customer List Participation** box on the Additional Info page for that customer.

The List Management window can also be used to create, modify, and delete customer lists. For more information, see **Chapter 8**, **AOSOS List Management**.

### To remove a customer record from a list:

- In the Customer List Participation box, click on the entry for the list from which the customer will be deleted. The list entry will be highlighted to indicate that it is selected.
- 2. Click the Remove button beneath the Customer List Participation box.
- A confirmation window will appear, asking you to confirm the customer's removal from the list. Click OK to confirm and perform the removal. To cancel the removal, click Cancel.

Once a customer record has been removed from a list, the list entry will no longer appear in the **Customer List Participation** box on the Additional Info page for that customer.

# Adding One or More Employers to a List

The Assign To List button at the bottom of the Employer Search window launches the List Management window (Figure 2-15) which allows you to add one or more of your employer search results to an existing list.

For more information on the creation and use of employer lists, see Chapter 8, AOSOS List Management.

<del>mmn<sub>i</sub></del>	
NOTE	

After performing an Employer Search, the Assign to List button will initially be grayed-out. It will not become active until you display the employer contact information using the Show/Hide Contacts button. See Showing/Hiding Employer Contacts on page 2-25 for complete instructions on displaying employer contact information in your list of search results.

To add one or more employers to a list:

- Perform an employer search as detailed in Performing an Employer Search on page 2-4.
- Use the Show Contacts button to display the employer contact information for your search results as instructed in Showing/Hiding Employer Contacts on page 2-25. Once you have displayed the employer contact information, the Assign to List button will become active.
- 3. Select one or more search result entries to be added to a list, as follows:
  - a. To select a single search result, click on its entry in the search results list. The entry will be highlighted to indicate that it is selected.
  - b. To select a sequential group of search results from the search results list, click to highlight the first record in the desired group, hold down the Shift key, and click on the last record in the desired group. All records in the selected range will be highlighted.
  - c. To select a non-sequential group of search results from the search results list, hold down the **Alt** key, and click to highlight each record in the desired group.
- Click the Assign to List button. The List Management window (Figure 2-15) will appear.

of the local division of the local divisione	k Search General Info	Additional Info	Custom						
	Office	Staff	List1	Jame	Created	Statewide	Shar	ed	
Г	Oswego	what is a tester, tester	New Cap Dist E	mployers	05/25/2000	No	No		-
	Oswego	what is a tester, tester	Modify and don't	tsave	06/02/2000	No	No		
	Oswego	what is a tester, tester	james family sto	оге	06/06/2000	No	No		
	Saratoga Springs	Tester2, Tester2	Delaware Co. E	mployers	06/07/2000	No	No		
	Buffalo	Tester3, Tester3	jims list		06/07/2000	No	No		
	Oswego	what is a tester, tester	delaware		06/07/2000	No	No		-1
	, ,		Individual List	18					_
		C Show All O	fice Lists	C Sho	w Both			100	
	Employer	Staff Assigned	Office	SEIN	City		reated	I ALLER	
	Employer Boiangles Chicken	Staff Assigned	Office	SEIN	City	06	reated	2533	
	Employer Bojangles Chicken Guick Copies	Staff Assigned Tester2, Tester2 Smith, John	Office Albany Carson City Loc	SEIN	City Guilderland Vestal	06/ 05/	reated 08/2000 23/2000	2533 2549	-
	Employer Boianoles Chicken. Quick Copies Savings Bank of Utica	Staff Assigned Tester2, Tester2 Smith, John what is a tester, teste	Office Albany Carson City Loc ar Oswego	SEIN	City Cuilderland Vestal Utica	06/ 05/ 06/	reated 08/2000 23/2000 29/2000	2533 2549 2512	-

Figure 2-15. The List Management Window

The **List Management** window features two groups of radio buttons below the list box which allow you to define which lists will be displayed. You must select a single radio button option from each group of options.

The leftmost group of radio buttons includes:

- Show Only My Lists Selecting this radio button will display employer lists which are owned/administered only by the staff person that is currently logged in.
- Show Lists in My Office Selecting this radio button will display employer lists which are owned/administered by any staff person that is in the same office as the person that is currently logged in.
- Show All Office Lists Selecting this radio button will display employer lists which are owned/administered by any staff person in any office in the entire state.

The rightmost group of radio buttons applies to the **Statewide** flag, which can be selected for a list. This group of radio buttons includes:

- Show Statewide Lists Selecting this radio button will display employer lists for which the Statewide flag has been selected.
- Show Individual Lists Selecting this radio button will display employer lists for which the Statewide flag has not been selected.
- Show Both Selecting this radio button will display all employer lists, regardless of the status of the Statewide flag.
- 5. Select a radio button option from each group of radio buttons on this page.
- Click the Lookup List button. The corresponding saved list entries will appear in the list box above the radio buttons.
- Select a list by clicking on the desired entry in the list box. The selected entry will be highlighted to indicate that it is selected.
- Click the Select button at the bottom of the List Management window. The selected employer record entries will be added to the selected list.

The List Management window can also be used to create, modify, and delete employer lists. For more information, see **Chapter 8**, **AOSOS List Management**.

### Adding One or More Job Orders to a List

The Assign To List button at the bottom of the Job Order Search window launches the List Management window (Figure 5-16) which allows you to add one or more of your job order search results to an existing job order list.

For more information on the creation and use of job order lists, see Chapter 8, AOSOS List Management.

To add one or more job orders to a list:

- Perform a job order search as detailed in Performing a Job Order Search on page 5-5.
- 2. Select one or more search result entries to be added to a list, as follows:
  - a. To select a single search result, click on its entry in the search results list. The entry will be highlighted to indicate that it is selected.
  - b. To select a sequential group of search results from the search results list, click to highlight the first job order in the desired group, hold down the Shift key, and click on the last job order in the desired group. All job orders in the selected range will be highlighted.
  - c. To select a non-sequential group of search results from the search results list, hold down the **Alt** key, and click to highlight each job order in the desired group.

Once you have selected one or more job orders from the search result list, the Assign to List button will become active.

 Click the Assign to List button. The List Management window (Figure 5-16) will appear.

List	t Management						
	Office	Staff	List Name	Created	Statewide	Shared	
	Oswego	Professional, \	new	06/28/2000	No	No	^
	Oswego	Professional, \	Please	06/28/2000	No	No	
	Oswego	Professional, \	csc	06/28/2000	No	Yes	
	Oswego	Professional, \	Help	06/28/2000	No	No	1
	Oswego	Professional, \	summer youth	06/29/2000	No	No	1
	Saratoga Sprir	Tester2, Teste	Summer Youth	06/29/2000	No	No	
	Oswego	Professional, \	Summer Youth	06/29/2000	No	No	
	0000000	Drefessional	Cummer Veuth	oeroorooo dual Liete	hio	Mo	
	ookup List	<ul> <li>Show Only</li> <li>Show Lists</li> <li>Show All C</li> </ul>	My Lists s in My Office Office Lists	(intel Elisto ) () ()	Show Statewide Show Individual Show Both	Lists Lists	
		Select Can	cel New List	Modify List	Delete List		

Figure 5-16. The List Management Window

The **List Management** window features two groups of radio buttons below the list box which allow you to define which lists will be displayed. You must select a single radio button option from each group of options.

The leftmost group of radio buttons includes:

- Show Only My Lists Selecting this radio button will display job order lists which are owned/administered only by the staff person that is currently logged in.
- Show Lists in My Office Selecting this radio button will display job order lists which are owned/administered by any staff person that is in the same office as the person that is currently logged in.
- Show All Office Lists Selecting this radio button will display job order lists which are owned/administered by any staff person in any office in the entire state.

The rightmost group of radio buttons applies to the **Statewide** flag, which can be selected for a list. This group of radio buttons includes:

- Show Statewide Lists Selecting this radio button will display job order lists for which the Statewide flag has been selected.
- Show Individual Lists Selecting this radio button will display job order lists for which the Statewide flag has not been selected.
- Show Both Selecting this radio button will display all job order lists, regardless of the status of the Statewide flag.
- 4. Select a radio button option from each group of radio buttons on this page.

- Click the Lookup List button. The corresponding saved list entries will appear in the list box above the radio buttons.
- Select a list by clicking on the desired entry in the list box. The selected entry will be highlighted to indicate that it is selected.
- Click the Select button at the bottom of the List Management window. The selected job order entries will be added to the selected list.

The List Management window can also be used to create, modify, and delete job order lists. For more information, see **Chapter 8**, **AOSOS List Management**.

### Desired Employers

The **Desired Employers** list box and function buttons are used to select a customer's desired employers by selecting from a list of employer names.

The Desired Employers list, from which these employer names are selected, is populated with employers that have an agreement with the state/local office to conduct candidate screening and selection on the employer's behalf. Employers are added to this list when the **Desired Employers List** checkbox is selected on the **General Info** page of their record in the AOSOS Employer Detail window (See **Chapter 3** of the *AOSOS Employer Services User's Guide* for details).

All selected employer names will be displayed in the **Desired Employers** list box. Employer names can be added and deleted from this list box.

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NOTES	

The employer names available for addition are obtained in a transaction that is controlled by the Employer Query security process. In order to use this feature, the user's group must be granted access to the Employer Query process using the AOSOS Admin application (see the AOSOS Admin Guide for details). If the user does not have Employer Query permissions, the Add an Employer button will be grayed out and unavailable for use. Previously added employer names can still be deleted from the list.

Also, if the Desired Employers list contains more than 500 employer names, only the first 500 will be available for selection from the **Desired Employers** list box. If this is the case, a note will be displayed on the screen next to the list box indicating the condition.

To add a desired employer for a customer:

 Click the Add an Employer button. The Desired Employers pop-up window (Figure 3-20) will appear, listing all AOSOS Desired Employers.

Desired Employers			
🗌 A Beautiful Company			^
AAAA			
ABC Drafting Company			=
ABC FOODS			
ABC Pet Groomer			
🗖 acne toys			
America's Business Express			
American Beauty			
Another Thyme Bed & Breakfast			
Any Exercise Club			
Any name DOL			
AppliedTheory Corporation			
AppliedTheory CorporationVar			
Bad Keys			
📃 barbara's babies			
Barely Berry Muffin Cafe			
Barely Berry Muffin Cafe #69			
Barely Berry Muffin Cafe rod			
Barely Berry Muffin Cafe'			
Barely Berry Muffins			~
Keyword(s)	Search	OK Clear Cancel	

Figure 3-20. The Desired Employers Pop-Up Window

- Click on a desired employer entry within the list box. The entry will be highlighted to indicate that it is selected.
- Click Add. The Desired Employers pop-up window will disappear, returning you to the Objective page. The selected employer will be listed in the Desired Employers list box. To cancel the operation, click Cancel.
- To add more desired employers for the customer, repeat Steps 1-3 for each desired employer.

To delete an employer entry:

- In the **Desired Employers** list box, click on the list entry to be deleted. The selected entry will be highlighted to indicate its selection.
- Click the Delete Selection button. A confirmation window will appear, asking you to confirm the employer's deletion. Click OK to confirm and perform the deletion, and the selected employer will be removed from the list box. To cancel the operation, click Cancel.

# Adding an Employer to the Desired Employer List

# **Desired Employers List**

Employers that have an agreement with the state/local office to conduct candidate screening and selection on the employer's behalf should be added to the Desired Employers List. This list can be used in the Customer module to allow customers to select one or more desired employers. The **Desired Employers List** checkbox is used to indicate whether the employer is on the state's Desired Employers list. To use the **Desired Employers List** checkbox:

 To add the employer record to the Desired Employers list, click on the checkbox. A check mark will appear in the checkbox to indicate its selection. To deselect this option, click on the checkbox again, and the check mark will disappear.

### Employer Records

We need to correct our database as much as possible by July 1, 2007 when E3 is implemented.

The new employer portal for Kentucky, E3, will use FEIN (Federal Employer Iden. Numbers) for processing and verifying employers. It is now mandatory that you add this field to all new EKOS employer records. Per management, you will also need to add this to existing records as you work with them between now and July. You will need to ask the employer for this number.

It is also available on UI Program 42 but this search can be tricky. Example: The KY Fried Chicken in Inez is listed as Angela's Food on UI 42. Angela's Food is the legal name. No where on the record do you see any reference to KY Fried Chicken. (If you search by Kentucky Fried Chicken in UI 42, you will get a large number of FEIN numbers for various franchises.)

By asking for the FEIN, you will also know when it is necessary to add a new employer record in EKOS or if you just need to add another contact to the existing record. IF the FEIN is already used for a corporation and they are simply adding another location, you just add a new contact page. EKOS will allow 300 employer contacts per employer record.

Do a search in EKOS for KY Fried Chicken; then search for KFC; then search for Kentucky Fried Chicken. You will see the many ways this record has been entered.

If several KFC's are owned by the same franchise, they should have one employer record. This information is needed for EEO reports provided from EKOS to employers for EEO audits.

If they currently have 2 records, inactivate the record with no job orders or activities. If both have open job orders attached, inactivate the one with the oldest job order. The system will allow you to inactive an employer record with an open order. You will also need to manually add the employer contacts from the "inactive" record to the "active" record if they do not already exist on that record. Place a post a note on the employer record's comment section stating why it is being inactivated.

When entering a new record for an independent contractor (as defined by UI auditors), we will use a pseudo number ex: 99-9701161

System = 3 9's

Your 2 digit office number

Contractor's month and year of birth

(This is the same process we use for customer pseudo numbers)

FEIN is not required for independent contractors. Always put a Post A Note that the employer stated they are not required to have a FEIN.

# E3 Website Overview

<u>www.e3.ky.gov</u> To View the E3 Training Package Click this Link <u>http://my.edcabinet.ky.gov/ekosinfo/e3TrainingPackage022409.pdf</u>

\*\*\* <u>Never Delete</u> an e3 Contact in the Employer Record \*\*\*

\*\*\* You *Cannot* manually enter a e3 contact in the Employer Record \*\*\*

### Job Order Match

# **Performing Matches and Referrals**

Using the search capabilities of the AOSOS Customer and Job Order modules, you can search for matching customers and job orders using the AOSOS Match mode functions. Once one or more matching records have been found, customers can be referred to an employer using the application's Refer functionality.

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NOTE	

Once a customer record is matched or referred to a job order, it will never again appear as a search result in a Match search using the same search criteria.

# Matches

Customer and Job Order Matches can be launched from either the Job Order or Customer modules.

#### Performing Matches from the Job Order Module

 Using the Job Order Search window, locate the desired job order for the Match operation (see Chapter 5, AOSOS Job Order Search for instructions) and display it in the Job Order Detail window (see Figure 7-1).

OR

Create and save a new job order (see Chapter 6, AOSOS Job Order Detail for instructions) using the Job Order Detail window (see Figure 7-1).

 In the Job Order Detail window, click the Match button (see Figure 7-1). The Customer Search window will appear. Several Customer Search window fields will be pre-populated with criteria from the job order (see Figure 7-2).



Click the **Match** button. The Customer Search window will appear (see Figure 7-2). Several Customer Search fields will be pre-populated with criteria from the Job Order.

Figure 7-1.

Customer Search window, with search criteria from the job order.

CUST	OMER	PROVIDER	EMBL OVED	OT APP	
		FROVIDER	EMPLOYER	STAFF	HELP
Customer Sear	ch	Customer Detail	Comp Assess	Services	
					1 - 25 of 27 🖲
lick Search Ge	neral info	Job Criter	ria Text Search Geographic	C Activities Programs I	list Search Custom
Education	Y	This Level	*		
Driver's Line	nen Roquin				
Diriel S Lice	nee require				
58N	Vet St	atus S	eekerName	Cto	jective
55N	Vet St	atus S 9 Hamington, St	eeker Name cranna to	Db nna employment as progr	ective ammer
SSN 117-05-1987 087-61-5989	Vet St No Activ No Activ	atus S 9 Hamington, St 19 Hamison, Mich	eekerName Giania to hael to	Ob nno employment as progr find full brne work	jective ammer
SSN 117-65-1987 087-61-5989 073-38-0027	Vet St No Activ No Activ No Activ	atus S 9 Hamington, St 19 Hamison, Mich 19 Hawithorne, R	eekerName to Inael to Isgina EC	Db nno employment as progr find full time work D 1	jective ammer
55N 117-55-1987 087-61-5989 073-38-0027 800-32-5555	Vet St No Activ No Activ No Activ No Activ	atus S 9 Hamington, St 19 Hamison, Mich 19 Hawithorne, R 19 hayes, willy m	eekerName to telania to hael to legina EC	Db find employment as progr find full time work 0.1 play center field for a maj	lective ammer or league baseball team
53N 117-05-1987 087-61-5989 073-38-0027 800-32-5555 555-55-5555	Vet St No Activ No Activ No Activ No Activ No Activ	atus S 19 Hamington, st 19 Harrison, Mid 19 Hawthorne, R 19 hayes, willy m 19 Hog, Ima	eekerName to calania to lagina EC 1 To fin	Db nno employment as progr find full time work ) 1 i play center field for a maj d an office job; secretary	lective ammer or league baseball team
SSN 117-55-1987 087-61-5989 073-38-0027 001-32-5655 565-55-5655 530-70-9439	Vet St No Activ No Activ No Activ No Activ No Activ No Activ	atus S Hamington, st re Harrison, Mid re Hawthorne, R re Hayes, willy m re Hog, Ima re Hogan, Sharo	eekerName to taalia to legina EC h To fin To fin D To	Db find employment as propr find full time work 1 play center field for a maj d an office job; secretary secure a challenging pos	ective ammer or league baseball team sition in which to utilize my skil
SSN 117-00-1987 087-01-5989 073-38-0027 800-32-6565 565-55-5655 531-710-9439 073-37-0096	Vet St No Activ No Activ No Activ No Activ No Activ No Activ No Activ	atus S B Hamington, St B Harrison, Mid B Hawthome, R B Hayes, willy m B Hog, Ima B Hogan, Sharo B Hogan, Sharo B Hollister, Jenr	eekerName to bael to legina EC fin To pn D To my EC	Ob find employment as progr find full time work ) 1 play center field for a maj d an office job; secretary secure a challenging pos 0 1	lective ammer or league baseball team sition in which to utilize my skil
80N 117-05-1987 087-01-5989 073-38-0027 800-32-6565 565-65-5555 530-70-945 980-77-4441	Vet St No Activ No Activ No Activ No Activ No Activ No Activ No Activ	atus S B Hamington, St B Hamison, Mich B Hawthome, R B Hays, willy m B Hogan, Sharo B Hollister, Jeni B Holse, Boss	eekerName to bael to legina EC n To fin on D To my EC To	Ob find employment as progr find full time work ) 1 uplay center field for a maj d an office job; secretary secure a challenging pos 0 1 use my skills in a civilian	jective ammer or league baseball team sition in which to utilize my skil capacity

Use the Customer Search window to search for matching customers for the job order.

#### Figure 7-2.

 If necessary, enter, change, and/or delete the search criteria on the various tabbed pages of the Customer Search window (see Chapter 2, AOSOS Customer Search in the AOSOS Customer Services User's Guide, for details).



If you click the Customer Search window's Clear button while performing a Match operation, Match mode will be cancelled. If you wish to remove or change search criteria for your Match operation, you should manually alter the necessary fields. Do not use the Clear button to clear the fields.

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NOTE

You cannot use the Customer SSN and Customer ID fields on the Customer Search window Quick Search page while in Match mode.

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I	
I	

The Customer Search Work Week conventions on the Job Criteria page operate as follows during a Match operation:

If the Match operation is initiated for a Full Time job, the customer search will return customer records that specify a preference for Full Time or Any employment.

If the Match operation is initiated for a **Part Time** job, the customer search will return customer records that specify a preference for Part Time or Any employment.

See Chapter 2, AOSOS Customer Search in the AOSOS Customer Services User's Guide, for details on the Customer Search window.

- To limit the size of your result set, click on the arrow button ( 

   ) in the
   Search Limit field, and select the desired result set size (25, 50, or 100) from the drop-down list.
- To activate the search, click the Search button. Your search results will appear in the Search Results list below the Customer Search window fields (see Figure 7-3).
  - a. At this point in the Match operation, if your customer search returns any search results, the Save Search button will become active. This button allows you to save the search parameters used in this Match operation so that the search can be performed again later. All saved searches will be listed on the Saved Searches page of the Job Order Detail window for later use. See Saved Searches, on page 7-13, for details on Saved Searches.
- 6. To match one or more customers to the job order, select the desired list entries in the Search Results list and click the Match button. The customer record(s) will be listed on the Matches page of the job order's Detail window (Figure 7-4). A Match activity will also appear on the Customer Detail Activities page and the Service History page (in the Services module) for each matched customer record. (see Figure 7-5).

istomer Search		PROVIDER	EWPLOYER	STAFF	THE ST.
	Custo	mer Detail	Comp Assess	Services	
					1 - 3 of 3
k Search General Ir	Educat	ion Antennan fr	out Search Generathic	Activities Programs	List Search Custom
and the second se		and a second sec	and a second second second second	Construction of the second second	Annual Contents, Southeasters
Education Equal To	👻 Thir	S Level Associates D	legree 💌		
<b>Driver's License Re</b>	quired	×			
		2000			
88N Vat	Status	Beslæ	ır Name	O	ajective
88N Vət 222-22-2298 No	Status Active	Besto Hamilton, James U	ir Name Find	Qi another job like the on	ajective e I have now, sit sround and r
88N Vət 22-22-2296 No 17-65-1997 No	Status Active	Besto Hamilton, James U Hamington, Stefan	rr Name Find	Qi another job like the on id employment as proc	ajective e I have now, sit around and r remmer
88N Vət 222-22-2298 No 17-65-1937 No 530-70-9439 No	Status Active Active Active	Beska Hamilton, James U Harrington, Stefan Hogan, Sharon D	rr Name Find W Find In To S	Oi I another job like the on Id employment as proc recure a challenging po	sjective e I have now, sit around and o remmer isition in which to utilize my sk
88N Vet 222-22-2298 No 17-65-1997 No 338-78-9439 No	Status Active Active Active	Besika Hamilton, James U Harrington, Slefan Hogan, Sharon D	rr Name Find W Find In To s	Oi I another job like the on Id employment as proc recure a challenging po	ojective e I have now, sit around and o remmer Isition in which to utilize my sk
88N Vət 222-22-2298 No 117-65-1997 No 530-70-9439 No	Status Active Active Active	Beeke Hamilton, James V Harrington, Stefan Hogan, Sharon D	rr Name Find W Find I <u>a Io fi</u> To s	Qi I another job like the on Id employment as proc recure a challenging po	sjective e I have now, sit around and o <del>ranner isitian in which to utilize my sk</del>
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- a. To review customer records before performing any matches, highlight one or more of your search results and click the Detail button. The Customer Detail window will appear.
- b. Review the customer record as necessary.
- c. If you decide to match a customer record after reviewing it in the Customer Detail window, click the Tag button at the bottom of the window. The button's label will change to UnTag. To deselect the record, click the UnTag button.
- d. Click the Return to Srch button. The Customer Detail window will disappear, returning you to the Customer Search window. You will still be in Match mode. If you tagged any customer records in their Customer Detail windows, their search result list entries will be highlighted.

e. Click the Match button. The selected customer record(s) will be listed on the Matches page of the job order's Detail window (Figure 7-4). A Match activity will also appear on the Customer Detail Activities page and the Service History page (in the Services module) for each matched customer record. (see Figure 7-5).



Figure 7-4.



Figure 7-5.

# Referrals

#### Performing Referrals from the Job Order Detail Window

After a customer has been matched to a job order, the customer will be listed on the Matches page of the Job Order Detail window. From here, a customer can be Referred to the employer for the job. To do so:

- On the Matches page of the Job Order Detail window, click on the list entry for the customer to be referred. The entry will be highlighted to indicate that it is selected (see Figure 7-13).
- Click the Referral button. The selected customer will be listed on the Referrals page of the Job Order Detail window (Figure 7-15). A Refer service will also appear on the Activities page of the customer record and the Service History page (in the Services module) for the customer (see Figure 7-10).



Figure 7-13.

#### Performing Referrals from a Search Window

During a Match operation, if you find a perfect Customer - Job match, you can perform a referral directly from the Customer or Job Order Search windows. To do so:

 Highlight the desired list entries and click the Refer button (see Figure 7-14). The customer(s) will be listed on the Referrals page of each involved job order's Detail window (Figure 7-15). A Refer service will also appear on the Activities page of the customer record and the Service History page (in the Services module) for the customer (see Figure 7-10).

Full Time	v	First Shift	v st	arting Pay		B	enefits				
Part Time	~	Second Shift	~	Minimum			<b>~</b> H	eath li	nsurand	e	
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Seasonal	Y	Rotating Shift				SickLeave					
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To refer customers to job orders from a Search window in Match mode, highlight the list entries and click the **Refer** button.



### Manually Adding a Referral for a Job

To manually refer a customer for a job order:

 In the Job Order Detail window, click the Referrals tab. The Referrals page (Figure 7-15) will appear.

CUST	CUSTOMER PROVIDER		ER	EMPLOYER	STA	FF	HELP		
Employer Sea	rch Employer	Detail	Job	o Order Search	Job Order	Detail			
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General Into Co	ntert into Liob fietail	Job Re	scription C	ommente Matet	Referrals	aved Searches	Audit		
C. SSN	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit	
183-74-8645	Akkineni, Rajendra	No	05/03/2006	Annaoureddy, Ma	Staff Matching				*
265-87-6787	Akkineni, Harry	No	06/19/2006	Annapureddy, Ma	Staff Matching				
032-54-6876	Akkineni, Harish	Yes	05/18/2006	Annapureddy, Ma	Steff Matching				
132-48-4687	Akkineni, Raghu	No	05/23/2006	Annapureddy, M	Staff Matching				
									-
	Add F	Referral	Post Rea	ult 🕴 Delete Refer	ral Print List	Cust Detai			
Em	oloyer Latter w/Resume	Custo	imer Letter w/	Job Drder Fo	low-Up w/ Employe	r Follow	-Up w/ Customer		
<u>S</u> a	ve Duplicate Emp No	aw Jab	Conespond	Print Emp Deta	il <u>B</u> eturn to Sean	ch Match Po	ost a Note Tog		

Figure 7-15. The Referrals Page of the Job Order Detail Window

 Click the Add Referral button. The Add Job Referral pop-up window (Figure 7-16) will appear.

Add a J	lob Referral		
SSN			Lookup Seeker
Name			
Date	06/19/2006		
	S	ave	Cancel

Figure 7-16. The Add Job Referral Pop-Up Window

In the SSN field, enter the valid Social Security Number for the customer to be referred.

- Click the Lookup Seeker button. AOSOS will retrieve the customer's name and display it in the Name field. If the Social Security Number is invalid, or does not exist in the system, an error message will result.
- In the Date field, enter the date on which the referral was performed (in mmddyyyy format). The value will be formatted by the system (i.e., separators, such as slashes, are automatically inserted), so enter only numeric characters.



Dates beyond the current system date are not allowed. If you attempt to add a referral with a date that exceeds the current system date, an error message will result.

6. To complete the referral, click the Save button. The Add Job Referral window will disappear, and the new referral entry will be listed on the Referrals page (its default referral method will be listed as Staff Matching). A Refer service will also appear on the Activities page of the customer record and the Service History page (in the Services module) for the customer (see Figure 7-10).

### Posting a Referral Result

To post result information for a referral:

- On the Referrals page of the Job Order Detail window, click on the list entry for the desired referral. The entry will be highlighted to indicate that it is selected.
- Click the Post Result button. The Post Result pop-up window (Figure 7-17) will appear.

Post Result
Seeker Name Akkineri, Harry
SSN 265-67-6787 Referral Date 06/19/2006
Stafi Annapureddy, Madhavi
Result Date 06/19/2006
Referral Method Staff Matching 💽 Result Hired 💽
Pay at Hire \$ 65000.00
DK Cancel

Figure 7-17. The Post Result pop-up window

By default, the Result Date field will display the current system date.
To change the Result Date, highlight the value in the Result Date field and enter the desired referral date (in mmddyyyy format). The value will be formatted by the system (i.e., separators, such as slashes, are automatically inserted), so enter only numeric characters.

199999999
NOTE

An error message will result on save if:

- The entered Result Date is invalid.
- The entered Result Date is beyond the current system date.
- The entered Result Date is before the Referral Date.
- To enter or change the referral method, click on the arrow button (

   ) in the Referral Method field, and select the desired method from the drop-down list.
- To enter or change the referral result, click on the arrow button (

   ) in the Result field, and select the desired result (e.g., Hired, Not Hired, FTR to Interview, Refused Job, etc.) from the drop-down list.



Referral results will be listed on the Customer Detail window Activities page for the customer.

- 6. To enter or change the salary and pay unit (for a hired referral):
  - a. Enter the starting pay amount in the Pay at Hire field. Enter the pay value in whole dollar and cent amounts. Commas and dollar signs should not be entered.
  - b. Select the unit of pay (Hourly, Daily, Weekly, Monthly, Yearly or Other) for the specified pay amount by clicking on the arrow button ( ) in the Unit field and selecting the appropriate pay unit from the drop-down list.



If **Hired** is selected for the **Result** field, the **Pay at Hire** and **Unit** fields require entries. The system will automatically populate these fields with the job order's Minimum salary value and unit. These values can be changed if necessary.

If anything other than **Hired** is present in the **Result** field, the **Pay at Hire** and **Unit** fields must remain blank in order to save the referral.

00000000	
NOTE	

If the salary entered, when calculated according to the **Pay** and **Unit** fields, is less than the minimum salary of \$10,192.00 per year or greater than the maximum salary of \$350,000.00 per year, a warning message will be generated stating that the entered salary is outside of the expected range.



When a referral is added for a job order, AOSOS automatically increments the Number of Referrals value for the order.

When a customer's **Result** value is changed to **Hired** for a job with a **Temporary**, Seasonal or **Regular** duration (full- or part-time), AOSOS automatically changes the customer's **Job** Seeker status to **Inactive**, and increments the Number of Hires for the job order.

If the customer is hired for a job with a Short Term duration (full- or part-time), the customer's Job Seeker field value will remain Active. The Number of Hires for the job order will still be incremented.

Click OK to perform your changes to the referral, or on Cancel to cancel the operation.

EEO Report -	
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EK Employer Nun	nber :		
Start Date	:	01/01/2008	
Ending Date	:	12/31/2008	

Date Printed : 02/23/2009

	Ethnicity Age														
Referrals	White	Black or African American	Hispanic or Latino	Alaskan or American Indian	Asian	Hawailan or Pacific Islander	Other	Under 16	16 - 21	21 - 40	40 and above	Male	Female	Veterans	Disability
894	378	124	9	1	1	0	199	0	15	343	354	479	233	94	73

Report Summary Page with Totals in each column

# EKOS ARRA CHANGES

# **CUSTOMER RECORDS**

Five ARRA Activities have been added for Customer records.

CUSTO	OMER PROVIDER E	EMPLOYER STAFF	HELP	
Customer Sear	ch 🦲 Customer Detail 📄 Comp	np Assess Services		
Adams, Kevin z.	SSN: 999	99-19-8055 OSOS ID: KY00119	95415 1 of 1	
G Gan. Info	Add'l Info Objective Work Hist. Ed/Lic Sk	kills Saved Searches Activilies	Comments Tests Returning Users	
Customer Dat Customer Dat SSN Usernamc Last Name Date of Eirth Address Oity Zip Code Country Phone Emai	Adari Info Objective Work Hist. Edif.ic Sk 8 999-19-89.155 N/A  Status Active 1catingnarch Password ma Adams First Name Ke 02/01/1995 Gender Fe POB 4355 Ison State Ke 40555 County F United States S606-335-2651 Alt	kills     Saved Searches     Activities     C       • Job Seaker     Active     •       narohtcaling     Kern     Mill       Kernale     •       Kernucky     •       Letcher     •       Activities     •       Activities     •	Comments       Tests       Returning Users       >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	×
U.S. Citizen Customer Ass Staff Assigned WIB Accigned Agency Office UI Claimant	Ignment       safregky0070, sefreg       EKCEP       DEPARTMENT OF LABOR       Office       0070 Prestoneburg OET       Services       Comp Assess       Activity       IA. Referration       in	Employment & Irainin Labor Exchange State Specific Labor Exchange TAA ARRA C Labor Exchange TAA ARRA C Labor Exchange TAA ARRA C Labor Exchange WIA ARRA AC Labor Exchange WIA ARRA AC Labor Exchange WIA Core	ustomer roor ARRA Cuptomer cult Customer hislocated Worker Cuctomer cult: Customer aning Contract	
		Activity Diste 01/27/20 RR Event #	209 V	

## (Screenshot 1 – Customer Activities) Search.

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Customer Search Custo	omer Detail Co	mp Assess	Services				
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SSN Vet Status 25 V gearch gear Stat: 60 ams, Kevin	s Sester N ees Pinstol Severation Other 1077 Whitesburg (	Ame Assan to be interch	ActMiles	ent & Training change ecific TAA ARRA Customer Wagner-Peyser Akka ( WA ARRA Disfocated () WA ARRA Disfocated () WA ARRA Youth Custor in the Job Training Confi Services ienerated	1.stom=r no: Vorker Cuatomer mo: ract		
			Koywa	012(6)	Search	OK Ce	it Cancel

(Screenshot 2 – Customer Activities Search) (Screenshot 3 – Customer Programs and Public Assistance)

CUSTOMER PROVIDER EMPLOYER	BTAFF	HELP		
Customer Search Customer Detail Comp Asses	Services			
Adams, Kevin z. 55N: 999 19 0055 0505	5 ID: KY001195415		1 of 1	
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Programs Military Service	Cur	stomer Lis	t Participation	
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anna 703s1 Sil 177 an	Public Assistance - We	nage tha	102	
Loss Proto Los an	Assistance			
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Staff Adams, Kevin Office: 0077 Whitesburg 01 National Ha	mworker Jobs Frogram	~		Abuse Counseling & Protect
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Customer Search.

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP
Customer Search	Customer Detail	Сотр Азвеев	Services	
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Veletan Eta		Y Line	er Living Sld 🔍 🗸	
Recently Separated	V	Ma	grant Status 🔍 🗸	
Service Disability	*		Profiled?	
ARRA Wagner-Peyee ARRA WIA Adut ARRA WIA Dislocate ARRA WIA Summer 1 ARRA WIA Summer 1 ARRA WIA Yourh Adult Education Bluegrass Orieller ge 1	r d Work∋r fouth Program			
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(Screenshot 4 – Customer Programs and Public Assistance Search) Changes have been made to Comp Assessment. All WIA Youth barriers, including Youth Needing Additional Assistance and Pregnant/Parenting Youth, are available for the expanded Youth age range of 14-24.



(Screenshot 5 – Youth Additional Assistance) (Screenshot 6 – Pregnant/Parenting Youth) Staff will still need to enter ARRA WIA customers in the Department of Training & ReEmployment Agency, including Summer Youth Employment (SYP).

CUSTOMER	PROVIDER	EMPLOYER	STAFF		HELP	
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(Screenshot 7 – Customer Services - Agency) (Screenshot 8 – Achievement Objective)

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP	
Customer Search	Customer Detail	Comp Assess 🛛 📒	Services		
lams, Kevin z.	5	SSN: 999 19 8055 OSO	S ID: KY00119	5415	
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Youth.

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Original Obligation		Total Obligation	\$ 0.00						
Offering Cost	S 00	Actual Cost							
Flanned Start Date	05/01/2009	Flanned End Date	03/30/2009						
Actual Start Date	05/01/2009	Actual End Date							
Next Contact Date	U//15/2009	Minimum Hours							
Program Svc Type	Youth Service	Completed	~						
Number of Weeks									
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(Screenshot 9 – Services)

	Level	Funding Source	Year	Remaining	
	WIB	WIA Adult Local	2008	\$ 999996.00	1
	WIB	WIA Dislocated Worke	2008	\$ 999990.00	
	WIB	Adult Statewide 15%	2006	\$ 1000000.00	
11	WIB	Additional Assistance	2006	\$ 1000000.00	
	WIB	Stimulus Summer Yo	2009	\$ 1000000.00	
	WIB	WIA Stimulus Adult Lo	2009	\$ 1000000.00	
	WIB	WIA Stimulus Disloca	2009	\$ 1000000.00	1
	WIB	WIA Stimulus Youth L	2009	\$ 1000000.00	
	State	Stimulus Dislocated \	2009	\$ 1000000.00	
	State	Stimulus Incumbent V	2009	\$ 1000000.00	
	State	Stimulus Adult Statew	2009	\$ 1000000.00	
M	State	NEG173(e)	2007	\$ 1402161.13	
	State	NEG Ice Storm	2009	\$ 1000000.00	

# (Screenshot 10 – Funding Streams)

Fund Name	ARRA/Formula	Age Limit	WIB/Statewid
WIA Adult Local	Formula	18-99	WIB
WIA Stimulus Adult	ARRA	18-99	WIB
Local			
Adult Statewide 15%	Formula	18-99	Statewide
Stimulus Adult	ARRA	18-99	Statewide
Statewide 15%			
Incumbent Worker 15%	Formula	18-99	Statewide
Stimulus Incumbent	ARRA	18-99	Statewide
Worker 15%*			
WIA DW Local	Formula	18-99	WIB
WIA Stimulus DW	ARRA	18-99	WIB
Local			
Additional Assistance	Formula	18-99	Statewide
DW Statewide 15%	Formula	18-99	Statewide
Stimulus DW	ARRA	18-99	Statewide
Statewide 15%			
Rapid Response	Formula	18-99	Statewide
WIA Youth Local	Formula	14-21	WIB
WIA Stimulus Youth	ARRA	14-24	WIB
Local			

Youth Statewide 15%	Formula	14-99***	Statewide
<b>Stimulus Youth</b>	ARRA	14-99***	Statewide
Statewide 15%			
Stimulus Summer	ARRA	14-24	WIB
Youth			

\* - Not Allowed – will not show in EKOS \*\* - Ages 22-24 cannot be correctly reported on WIASRD \*\*\* - Legacy application edit

Measures Enrollment. It will only create a Stimulus Summer Youth Enrollment.

CUSTOMER	PROVIDER	EMPLOYE	R STAFF	HELP	
Customer Search	Customer Detail	Comp Assess	Services		
dams, Kevin z.		SSN: 999 19 8055	OSOS ID: KY001195-	115	
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Program Type	e Stinulus Summer Youth	1	Exit Date		
Enrollment Date	e 04/15/2009 Enrolled in	Education Y	Exi, Reason		v
Enrolling Service Name			3rd Qu Exclusion		
Enrol ing Service Type	Summer-Related Employm	ent Opportunities	Exil Admin		
Errolling Admin	Adame, Kavn		Exil Olfice		
Errolling Office	0077 Whitseburg OET				
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Employment Status	Not Employed		Transaction Admin	A	1
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off Adams Kevin	Office: 2077 Wh	Itesburg OET		Security: De cl	to 04/27/200

	CUSTOMER	PROVIDER	EN	MPLOYER	STAFE	HELP	
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	DASIC SKILLS-00		05/01/2007	Kevin Adams	Department for Trainin	Tell Co.JobSight WA	
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	ASSESSMENT-07		11/07/2008	lester what is a tester	Department for Trainin	Bell Co JobSight W.A	
	SUMMER YOUTH EMP.	CYMENT 35	04/15/2009	Kevin Adams	Department for Trainin	EKCEP OFFICE	
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	Inter Agency Referra		03/25/2009	tester what is a tester	DEPARTMENT OF LA	3080 Frankfort Central	
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31	aF Adams Kevin	Office 0077 Wa	ites turg OFT			Security: Delete 04/	77/2009

		Eligibility Criteria		
Adult Only:		Youth Only:		
Homeless		Homeless/Runaway/Foster Child		
		Requires Additional Assistance		
Multiple Audience:		Deficient in Basic English Literacy Skills	Х	
Cash Public Assistance		School Dropout	Х	
Low Income Priority		Offender		
Physical Disability	X	Pregnant or Parenting		
Learning Disability		Poor Work History		
Other				
Local Priority		Special 5% Rule (Youth only):		
Dislocated Worker		Basic Skills Deficient	Х	
Displaced Homemaker		One or more grade levels below grade level appropriate age		
Food Stamps		Serious Barriers to Employment		
Income 70% LLSIL				
		Profiled     Date       Disability Status     Disabled       Disability Category     Not Disclosed       Limited English     Yes       Reason For Leaving     Lack of work       Dislocation Date		
		Farmwork Type		



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#### ARRA

# System Help for the ARRA Tab (v. 16)

## **General Information**

The purpose of this custom tablis to gather information on customers receiving assistance using etimulus funding as a result of (or with funds from) the American Recovery & Reinvestment Act (ARRA) of 2009. If you are experiencing problems or have questions regarding information on this table assistment are level, project(2)(k), gov. ~

¥

The left side of the tab shows a selection list of all ARRA records for the parent *Cust. (Service Flan)* record. This section of the tab a lowe you to choose the specific record you wish to view or maintain.

The right side of the tab shows the detailed information for the selected ARRA record.

Authorized administrators may search for Cust. (Service Plan) records based on the presence of ARRA records in the Customer Search module

Data for ARRA records will be kept on the "sv08\_sr\_ana00" table in the database. A hieldry of changes for each ARRA record will be kept in the Warehouse on the "nist\_sv08\_sr\_arra00" table.

### Security

The ARRA labile only available to collhorized administrators providing normal authority levels (none, select, insert, update and defet) baced on the secondy group(s) to which the administrator is associated. Supplemental diaministration (lab) decarity is a collared on the second provided decod on decarity proups. If specified, unauthorized doministrators will be unable to display the tab.

In addition to accurity group authorization, the ARRA table further restricted to only those doministrators who are appligned to these Willow

OK.

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# **EMPLOYER RECORDS AND E3**

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#### TRAINING EVALUATION

Subject:	Date:
Trainer(s) _	
Did thi (	s training meet your expectations? Circle Yes or No and respond
Yes	NO Please explain how and why
<u>What v</u> <u>What v</u>	<u>vas the most <b>interesting</b> part of the training?</u> was the most <b>important</b> new information that you learned?

What improvements would you suggest for this training?

How long have you worked for the agency?

Rate the quality of the presentation of material by the instructor(s) Low------High 1 2 3 4 5

Comments on Instructor(s)

Additional Comments: