Career Connect Tips & Tricks

February 14, 2018

Happy Valentine's Day!

Webinar Logistics

- Everyone is in “listen only” mode.
- Type your questions in the “Question” box. We will answer as many questions as we can during the call.
- All materials will be posted on the Career Connect Help Desk site: workforceboard.zendesk.com
- We are recording the webinar and will provide a link to it on the Help Desk.

Webinar Agenda

1. Avoid Emailing Personally Identifiable Information (PII)
2. WIOA Services:
   - Definitions & Business Rules
   - Avoiding Common Mistakes
   - Editing vs. Voiding Services
3. Where's My Case Note?
4. Correctly Entering Quarterly Follow-ups
5. Helpful Staff "Alerts"
6. Questions?

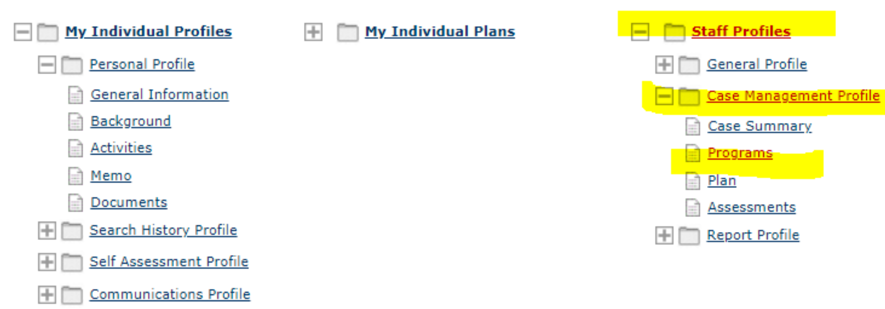
Don’t Email PII

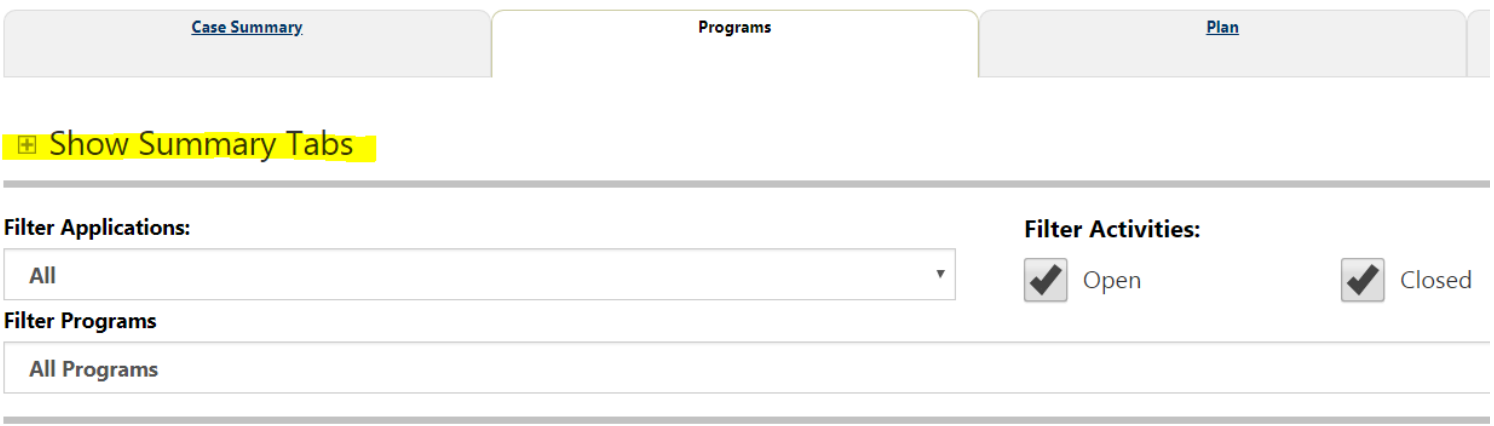
- Personally Identifiable Information (PII) is sensitive data that can be used for identity theft.
- Career Connect assigns a UNIQUE “User ID” # to each customer that can be used ***instead of*** the SSN to find the customer in the system.
- When sending a request to the help desk, please provide the customer first & last name & the User ID number along with any other relevant information. **DO NOT** provide the SSN last 4, DOB, or other personal information (unless it is relevant to the issue to be resolved).
- The next slide shows how to find the User ID.

Don’t Email PII

Path: Staff Profile > Case Management Profile > Programs

Click on the “+” next to “Show Summary Tabs”





Don’t Email PII

Case Summary | Programs

⊟ Hide Summary Tabs

Individual Detail | Summary View

Login Details

Username	255435
User ID	255435
Login Name	LLOEB9738
State ID	3913963

← The User ID # displays on the “Individual Detail” tab of the Summary Tabs.

Services Definitions & Rules

- Lists of WIOA Services are available on the CC Help Desk site at: https://workforceboard.zendesk.com/hc/en-us/sections/115002594827-WIOA-Service-Activity-Definitions-Rules
- Lists are organized by service type and customer group:
  - Universal Services – Not yet posted; being updated
  - Adult / DW Services
  - Youth Services
  - Follow-up Services
- Each service has a definition
- List includes service business rules such as:
  - Service Activity Level
  - Same Day Service (open and closed on the same day)
  - If another service must be opened first

Services Definitions & Rules

Career Connect Youth Service Activities (January 2018)

Path: Staff Profiles > Case Management Profile > Programs > WIOA (expand WIOA section) > Activities/Enrollments/Services

Activity Code	Activity Title	Service Activity Level	Definitions	Activity Rule
001	Holding	Work Related & Academic Learning Service	Activity which allows a customer to be held without receiving training or services if his or her program is interrupted due to illness or other unforeseen circumstances and during normal breaks in the academic or vocational training schedule. A customer may also be enrolled in this activity when they have completed all of their other activities and are awaiting exit. This activity cannot be used to enroll a customer into a title and is limited to 180 days except under special circumstance.	**A.** Cannot be the first service.
400	Advanced Academic / Prerequisite Training	Academic Learning Services	An academic skills training activity for youth and adults which provides clients who already possess basic skill competencies with additional training which: a.) Enable them to meet more rigorous academic skill requirements for successful completion of an occupational tr4aining program; or b.) Enable them to secure employment based on a combination of prior occupational skills and the academic training provided in this program.	**A.** Must have ISS (Activity Code 413) before entering this activity.
408	Drop-out Recovery - Same Day Service	Academic Learning Services	Alternative secondary school service, such as basic education skills training, individualized academic instruction, and English as a secondary Language training, are those that assist youth who have struggled in traditional secondary education. Dropout recovery service such as credit recovery, counseling and educational plan development. Are those that assist youth who have dropped out of school.Need DCEO Definition	**A.** Must have ISS (Activity Code 413) before entering this activity. **B.** Service must be opened and closed on the same day. Staff must add Case Note

"New" Services

- The following services were added in the switch to Career Connect:
  - 221/428: Individualized Services & Training Plan (ISTEP) for OJT – *See ISTEP & OJT Procedures on Help Desk*
  - 226/449: Co-enrolled in IWDS (Check IWDS before Closing / Exiting) – *See Co-Enrollment Procedures on Help Desk*
  - 227/450: Education offered concurrently with workforce programs – Same Day Service
  - 303/416: Career Pathway Training (non-ITA)
  - 307/403: Bridge Training (WIOA Funded, non-ITA)

Same Day Services

- Actual Start Date **must equal** Actual End Date
- Service must be **closed on same day it's entered**
- Must include a **Case Note**
- Agencies should run the ***Open Same Day Service*** report **monthly** to find and **correct** any open Same Day Services, See the Career Connect Case Management Reports document on the Help Desk site for instructions: https://workforceboard.zendesk.com/hc/en-us/articles/115002782311-Case-Management-Report-Instructions-Updated-1-10-18-
- Site Directors have access to back-date services more than 90 days

Same Day Services - Correct

Search:

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
C	413 - Develop Individual Service Strategies - Same Day Service Business And Career Services Inc.	W	Youth	N/A	08/01/2017	08/01/2017	08/01/2017 Successful Completion

Example of a Correct Same Day Service

Enrollment Summary:
Enrollment ID: 260907
Username: LLOEB9738
WIOA Application ID: 314930
Youth Funding:Out Of School Youth
Activity Code: 413 - Develop Individual Service Strategies - Same Day Service
Activity Dates: 8/1/2017 - 8/1/2017

Last Activity Date: 08/01/2017 Today

Completion Code: Successful Completion

School Status on Last Day of Service: Not attending school,H.S. Dropout

School Status Verification: [Verify | Scan | Upload | Link]
Verification documentation not required

Case Notes: [Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
2856762	01/22/2018	Developed ISS with Customer	Edit |

Same Day Services - Incorrect

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
O	405 - Case Management -Same Day Service No Provider Information	W	Youth	N/A	09/15/2017	09/15/2017	Close

Example of an <u>Incorrect</u> Same Day Service

Enrollment Summary:
Enrollment ID: 261007
Username: LLOEB9738
WIOA Application ID: 314930
Youth Funding:Out Of School Youth
Activity Code: 405 - Case Management -Same Day Service
Activity Dates: 9/15/2017 - 9/15/2017

Last Activity Date: Today

Completion Code: None Selected

School Status on Last Day of Service: None Selected

School Status Verification: [Verify | Scan | Upload | Link]

Case Notes: [Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
No data found.			

Projected vs. Actual Start Date

- Services that are missing the Actual Start Date do NOT Transmit to IWDS
- The Partnership recommends leaving the *Projected* Start Date blank and only completing the *Actual* Start Date to avoid mistakes

Incorrect

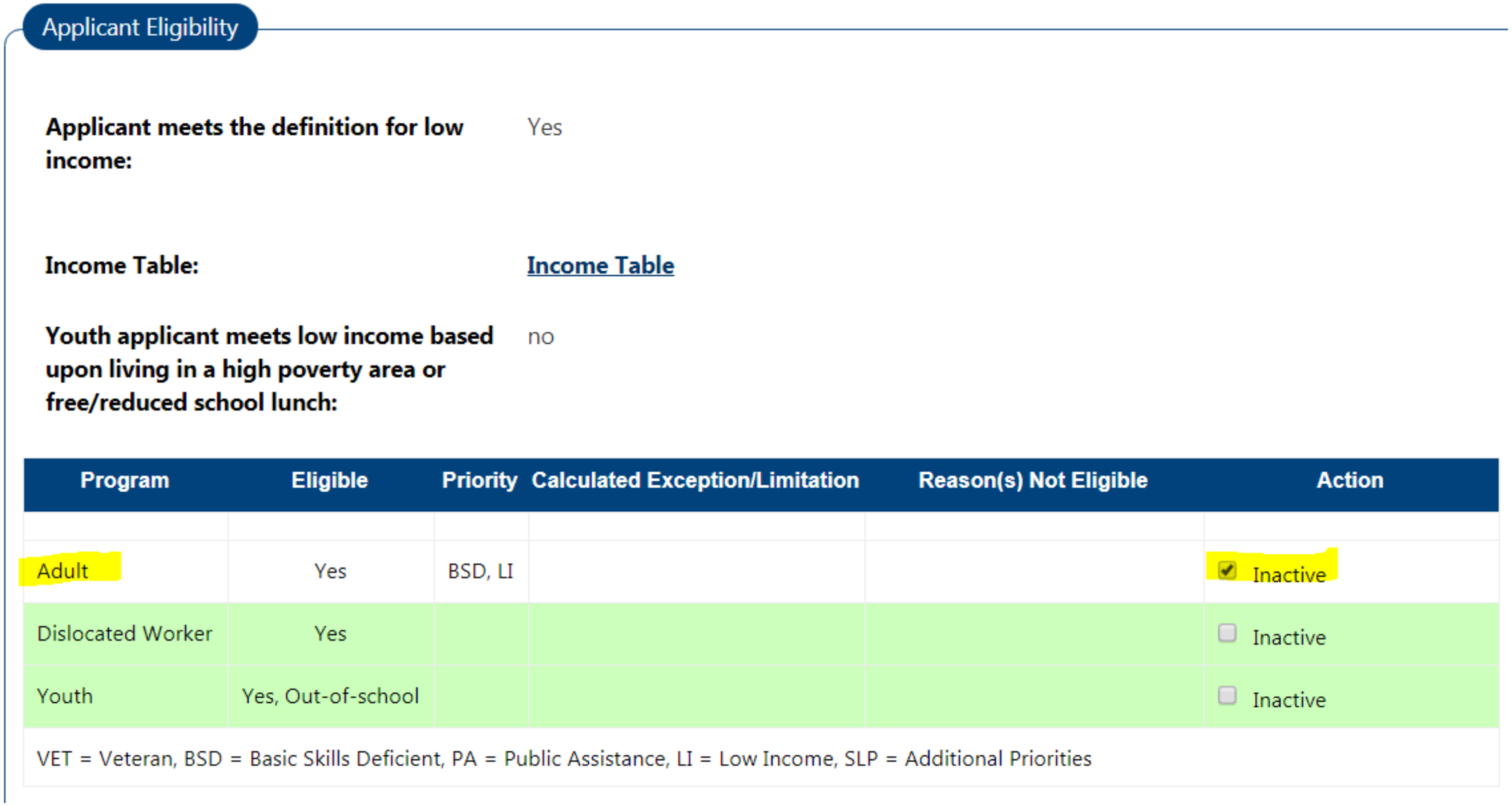
Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
O	207 - In-Depth Interviewing and Evaluation (817) Business And Career Services Inc.	W	Dislocated Worker	09/20/2017	N/A	10/20/2017	Close
C	181 - Supportive Service - Transportation Assistance (492) Business And Career Services Inc.	W	Dislocated Worker	09/12/2017	09/12/2017	09/19/2017	09/19/2017 Successful Completion
O	226 - Co-enrolled in IWDS (Check IWDS Before Closing / Exiting) Business And Career Services Inc.	W	Dislocated Worker	N/A	08/01/2017	08/01/2017	Close

Inactivating a Customer Group

- Services with the wrong Customer Group (e.g. Adult, DW, Youth) must be deleted & re-entered.
- If a customer is eligible in more than one Customer Group (e.g. Adult & DW), but will only be enrolled in one (e.g. DW), staff can "Inactive" the Adult eligibility so that no Adult Services can be added.
- The inactivation can be removed if services need to be added for the inactive Customer Group.

Inactivating a Customer Group

- Inactivate a Customer Group by checking the “Inactive” box on the Eligibility & Grants screen of the WIOA Application. Click “Finish” when done.

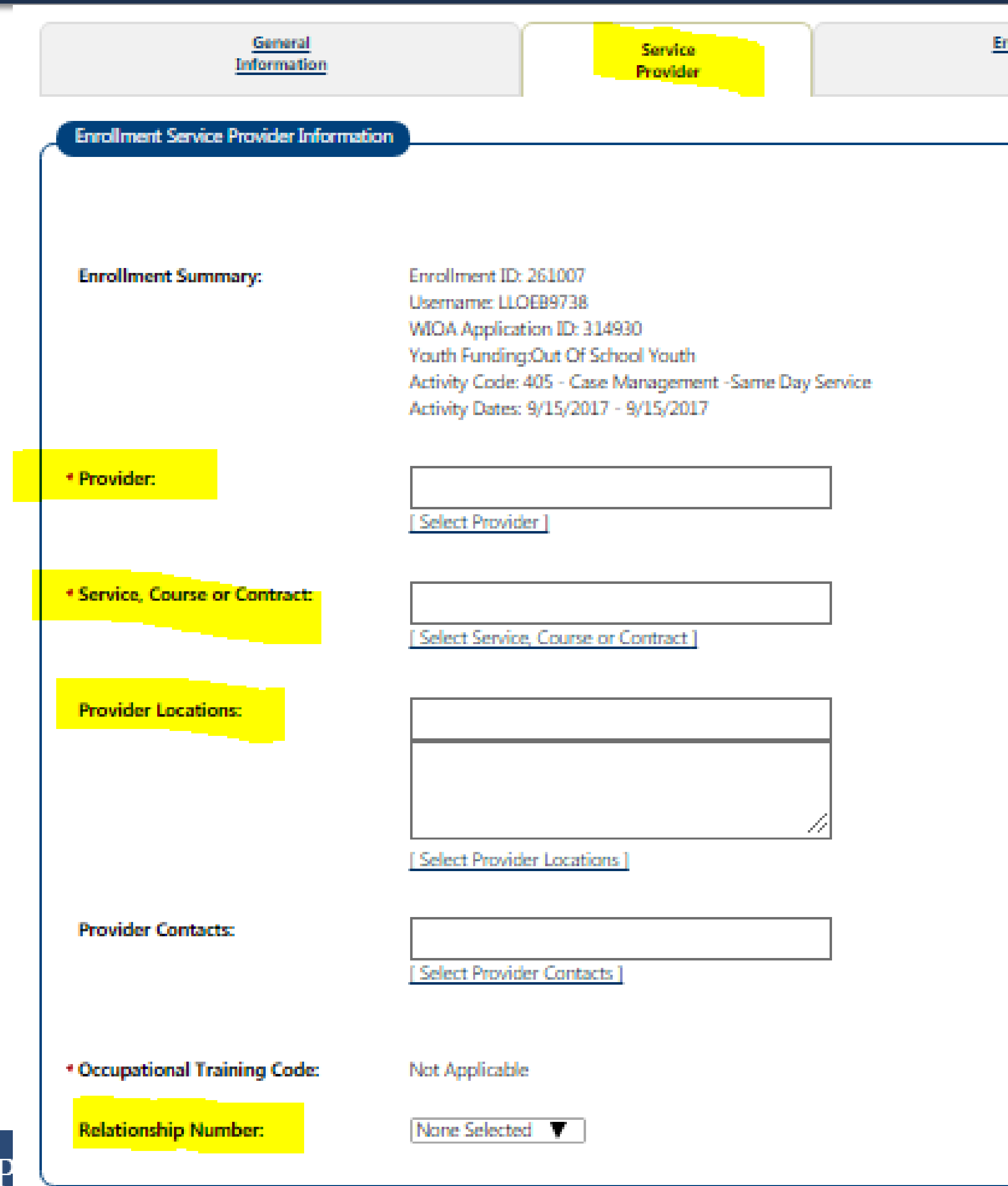


Adding Provider & Relationship

- Services that are missing the Provider Data (Service Provider tab) do NOT Transmit to IWDS
- All services must have:
  - Provider
  - Service, course or contract
  - Provider Location
  - Relationship Number

Adding Provider & Relationship

All highlighted fields are *required* (even if they do not have a red *)


General Information | Service Provider | Enr...

Enrollment Service Provider Information

Enrollment Summary: Enrollment ID: 261007
Username: LLOEB9738
WIOA Application ID: 314930
Youth Funding:Out Of School Youth
Activity Code: 405 - Case Management -Same Day Service
Activity Dates: 9/15/2017 - 9/15/2017

* Provider: [Select Provider]

* Service, Course or Contract: [Select Service, Course or Contract]

Provider Locations: [Select Provider Locations]

Provider Contacts: [Select Provider Contacts]

* Occupational Training Code: Not Applicable

Relationship Number: None Selected

Adding Provider & Relationship

- If the desired ***Provider*** or the ***Service, Course, or Contract*** information does not display for selection, submit a ticket to helpdesk@workforceboard.org with the following information:
  - Customer first & last name & user ID #
  - The service code & description
  - The desired Provider and, if an ITA Training provider, the training Program name

Adding Provider & Relationship

Use the following to select the correct Relationship #:

Customer Group / Service	Relationship #
Adult	# ending in 100
DW	# ending in 300
In-School Youth	# ending in 400
Out-of-School Youth	# ending in 500
Shared Placement (all customer groups)	# ending in 200
Occupational Classroom Training Service (all customer groups)	# beginning with 4000

Adding Provider & Relationship

- If no Relationship number displays for selection:
  - Check that you selected the correct Customer Group for the service. (If not, the service will need to be voided & re-entered.)
  - Try selecting a different Location. (Relationship numbers are only attached to one location for each Provider.)

Adding Provider & Relationship

- If you are still unable to select a Relationship number, send a ticket to helpdesk@workforceboard.org with the following information:
  - Customer first & last name & user ID #
  - The service code & description
  - The correct customer group
  - The desired Provider and, if an ITA Training provider, the training Program name

Editing vs. Voiding Services

The following Service fields can be edited *prior to Closure/Exit*:

Service Record Field	Staff that Can Edit
Edit Projected Start / End Dates	Career Coach & above
Add missing Provider / Relationship data	Career Coach & above
Add / Close a Service that is more than 90-days old	Agency Site Director (or equivalent)
Edit: • Actual Start / End Dates* • Office • Grant • State Fund • Provider Location • Relationship # • Completion Code	Partnership
Re-open Closed Service	Partnership
Edit Service after Exit	IL Dept of Commerce

**In most cases.*

Editing vs. Voiding Services

- The following Service fields cannot be edited. Errors with these fields require voiding & reentering the service:
  - Customer Program Group (e.g. Adult, Youth, NDWG)
  - Activity Code
  - Provider
  - Service, Course or Contract
- If the error is with the 1st (Participation) Service, all Services, the Participation, and Lit/Num tests **must be deleted & re-entered**.

Where's My Case Note?

- You know you entered a case note, but you don't see it on the Case Note screen. Where did it go?
- Odds are, you "Suppressed" the case note.
- In order to see your Suppressed case notes, you have to change your Case Note screen filters.
- Any LWIA07 staff with access to view case notes, can see "Suppressed" case notes for any customer – *so The Partnership recommends NOT suppressing case notes*.

Viewing Suppressed Case Notes

On the "Case Notes" screen, click on the "+" next to "Show Filter Criteria"

Summary | Case Notes | Activities

[Add New Case Note | Print Selected Case Notes]

+ Show Case Note Privileges

+ Show Filter Criteria

Results View: **Summary** | Detailed

To sort on any column, click a column title.

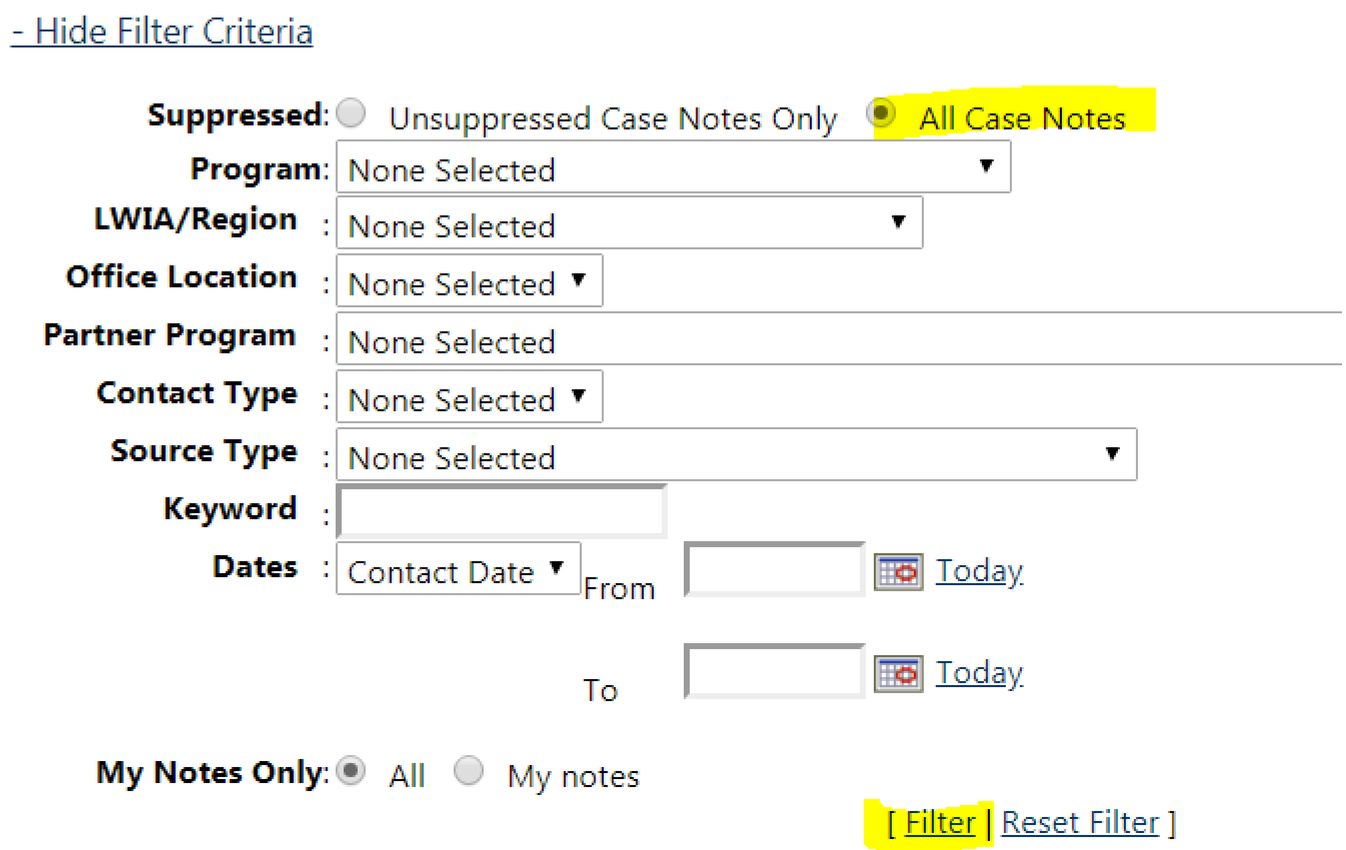
App ID	Subject	Contact Date	Create Date	Staff User	LWIA	Office	Program	Source / ID	Action	select
314930	Reading	1/3/2018	1/3/2018	Ore, Gabriela	07	10	WIOA	Literacy Numeracy-314930	Edit/Delete	
314930	Developed ISS with Customer	8/1/2017	1/22/2018	Al-Khatib, Dena	07	10	WIOA	Enrollment-260907	Edit/Delete	

Page 1 of 1 Rows 100

2 Records Found

Viewing Suppressed Case Notes

Select "All Case Notes" and then click "Filter"



Viewing Suppressed Case Notes

Now all Case Notes, including Suppressed notes will display.

Results View: **Summary** | Detailed

To sort on any column, click a column title.

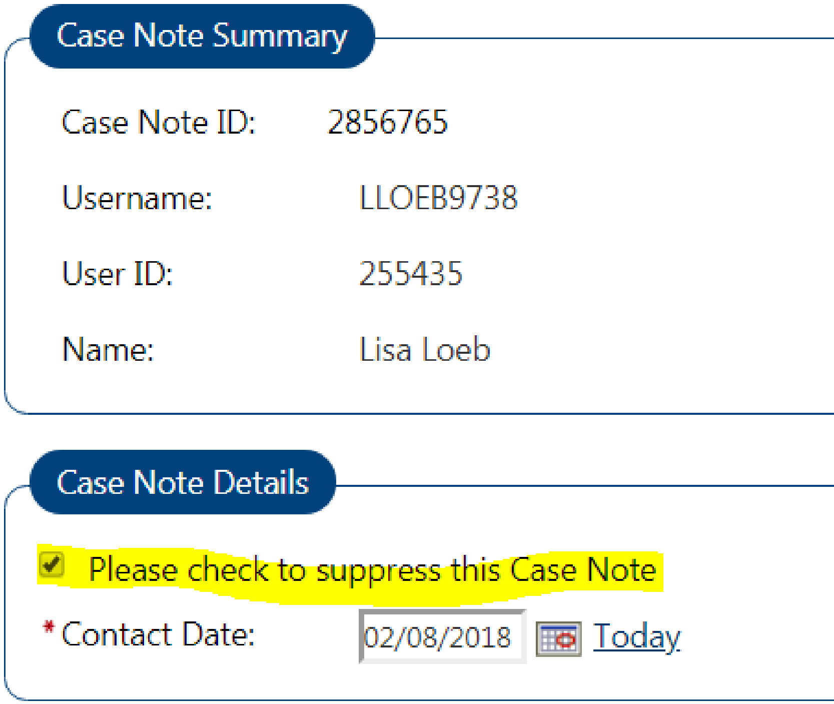
App ID	Subject	Contact Date	Create Date	Staff User	LWIA	Office	Program	Source / ID	Action	select
314930	Don't Suppress Case Notes	2/8/2018	2/8/2018	Al-Khatib, Dena	07	10	WIOA	Case Note-NA	Edit/Delete	
314930	Reading	1/3/2018	1/3/2018	Ore, Gabriela	07	10	WIOA	Literacy Numeracy-314930	Edit/Delete	
314930	Developed ISS with Customer	8/1/2017	1/22/2018	Al-Khatib, Dena	07	10	WIOA	Enrollment-260907	Edit/Delete	

Page 1 of 1 Rows 100

3 Records Found

Un-suppressing Case Notes

To "Un-suppress" a Case Note, go in to Edit the note & un-check the "Please suppress this Case Note" box.


Case Note Summary

Case Note ID: 2856765

Username: LLOEB9738

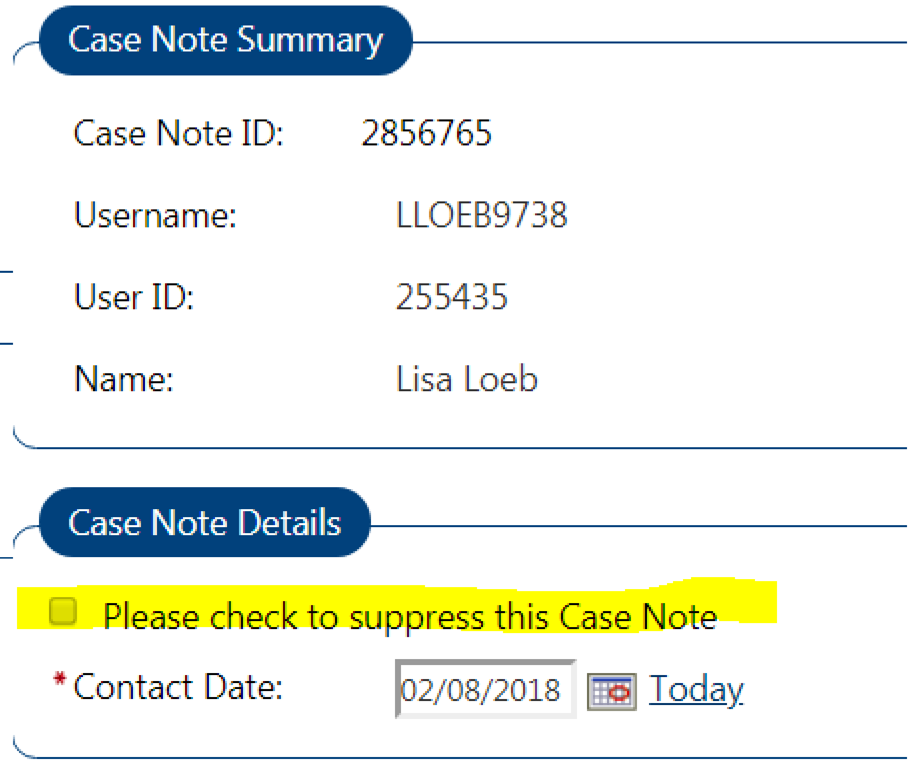
User ID: 255435

Name: Lisa Loeb

Case Note Details

☑ Please check to suppress this Case Note

* Contact Date: 02/08/2018 Today


Case Note Summary

Case Note ID: 2856765

Username: LLOEB9738

User ID: 255435

Name: Lisa Loeb

Case Note Details

☐ Please check to suppress this Case Note

* Contact Date: 02/08/2018 Today

Quarterly Follow-ups

- Quarterly Follow-ups will not transmit to IWDS if the "Status at Follow-up Field" is left as "None Selected".
- Even though it's not a required field on the screen – please complete it for every follow-up.

Current Status at Follow-up

Follow-up Information:

* **Actual Date of Follow-Up:**	01/05/2018 Today
* **Contact Type:**	Telephone - Individual
Other (specify):	

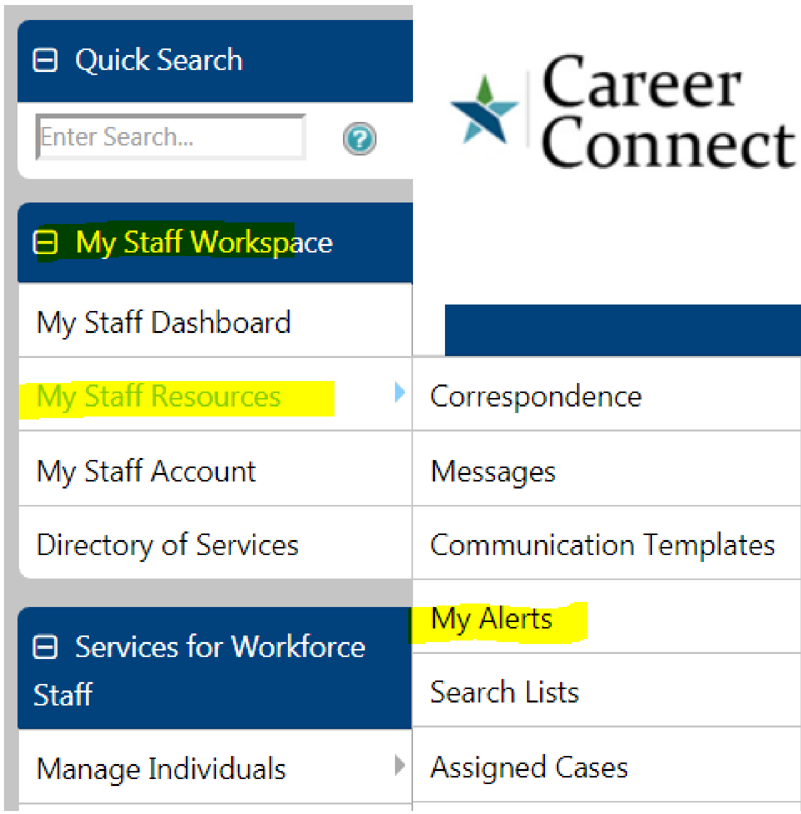
This section is required only when no employment, no youth placement and no youth diploma/credential is recorded on the follow-up screen.

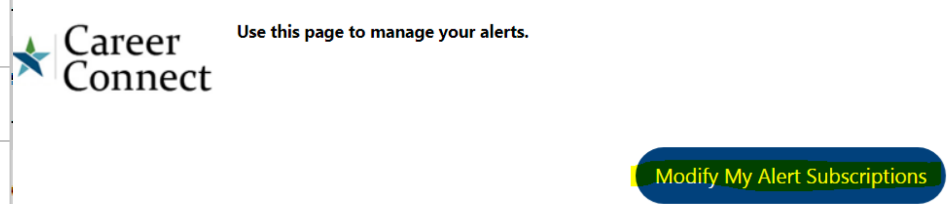
Follow-up Status

Status at Follow-Up:	Unsubsidized Employment
Other (specify):	
Comments:	

Staff Alerts

- Staff alerts help you manage your case load.
- To set-up alerts, use the left navigation menu and go to “My Staff Resources > My Alerts”
- On the next scree, click on “Modify My Alert Subscriptions” to access a list of available alerts.



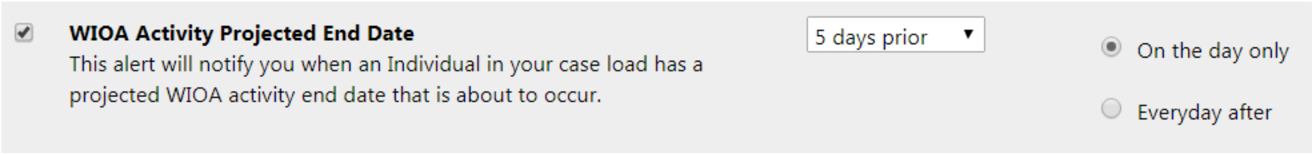


Staff Alerts

- Alerts are divided into sections
- Each alert is described on the screen
- The following "WIOA Innovation and Opportunity (WIOA) Alerts" may be helpful:
  - WIOA Activity Projected End Date
  - WIOA Male Participants about to turn 18
  - WIOA Followup Alert
  - Individual # of Days Since Last Workforce Innovation Opportunity Act (WIOA) Activity *(NOTE: This alert applies to all WIOA services, not just "Active" services.)*
- All of the IEP Alerts may be useful, too.

Staff Alerts

- To set an alert:
  - Check the check box next to the alert
  - Set the # of days prior to the "due date" that you want to receive the alert
  - Select "On the day only" if you want to be alerted one time for each customer; select "Everyday after" if you want to receive the alert daily for each customer until you have follow-up on the item.



In the example above, you would be alerted 5 days prior to each customers' projected service end date. You would only be alerted once for each service for each customer.

Staff Alerts

- When you log into Career Connect you will see the following pop-up screen if you have any alerts. You can click on the envelop to access your alerts immediately.

- Or you can access them later from your dashboard via the Message Center.

Staff Alerts

- The message center looks & works much like an email box. You can read, delete, and sort messages into folders.

- Folders
  - Inbox (385)
  - Deleted
  - Drafts
  - Junk
  - Sent
  - Purged
- My Folders

		From	Subject	Msg Date	Select
		POSTMASTER	Program Review Status Change	02/08/2018 12:31 AM	
		POSTMASTER	Provider User Registration Notification	02/08/2018 12:30 AM	
		POSTMASTER	Program Change Notification - Informational	02/08/2018 12:30 AM	
		POSTMASTER	Provider User Registration Notification	02/07/2018 12:30 AM	
		POSTMASTER	Provider User Registration Notification	02/06/2018 12:30 AM	
		POSTMASTER	Provider User Registration Notification	02/05/2018 12:30 AM	
		POSTMASTER	Program Review Status Change	02/04/2018 12:31 AM	
		POSTMASTER	Provider User Registration Notification	02/04/2018 12:30 AM	
		POSTMASTER	Program Review Status Change	02/03/2018 12:31 AM	
		POSTMASTER	Program Change Notification - Informational	02/03/2018 12:30 AM	

1 2 3 4 5 6 7 8 9 10 ... Page size: 10 386 items in 39 pages

Questions?

Upcoming Trainings / Webinars

- Full details & registration links for all upcoming trainings are available at: https://workforceboard.zendesk.com/hc/en-us/articles/360000701731-Career-Connect-Upcoming-Training
  - Thurs. 2/22 – Career Connect Job Developer Training
  - Wed. 2/28 – Case Closure/Exit Webinar
  - Wed. 3/7 – Income Calculation Webinar
  - Thurs. 3/8 – Career Connect Job Developer Training
  - Wed. 3/21 – Case Notes Webinar
  - Thurs. 4/12 – Career Connect Job Developer Training