Career Connect Staff Client Registration Instructions

Overview

These instructions walk Title II Partners through how to:

- create a client account in Career Connect
- record client consent for making referrals to other service providers
- edit the client profile as needed

Once the client account is set-up and the client's consent is recorded, staff can refer clients to partner agencies and those partner agencies can input the results of those referrals. (Creating and resulting referrals is covered in a separate document.)

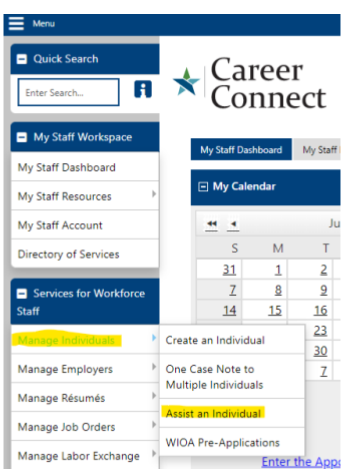
Obtaining Client Consent

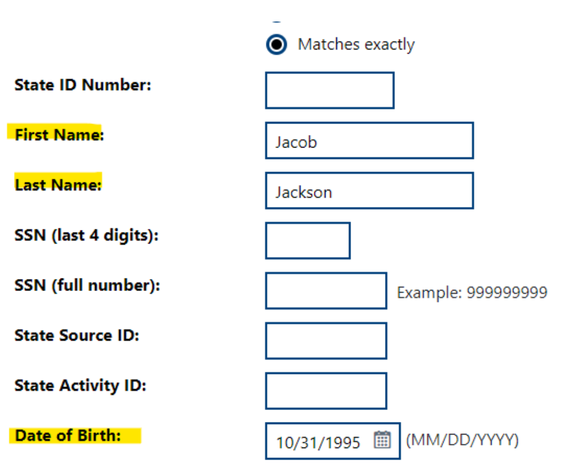
Prior to creating a client Career Connect account, please have the client complete the consent form attached in Exhibit A. (Note that if the client creates their own account they will be required to consent as part of the account set-up.) Keep a copy of the signed consent in your records. Note that if the client does not provide consent, you will not be able to refer them for services.

Registration Steps

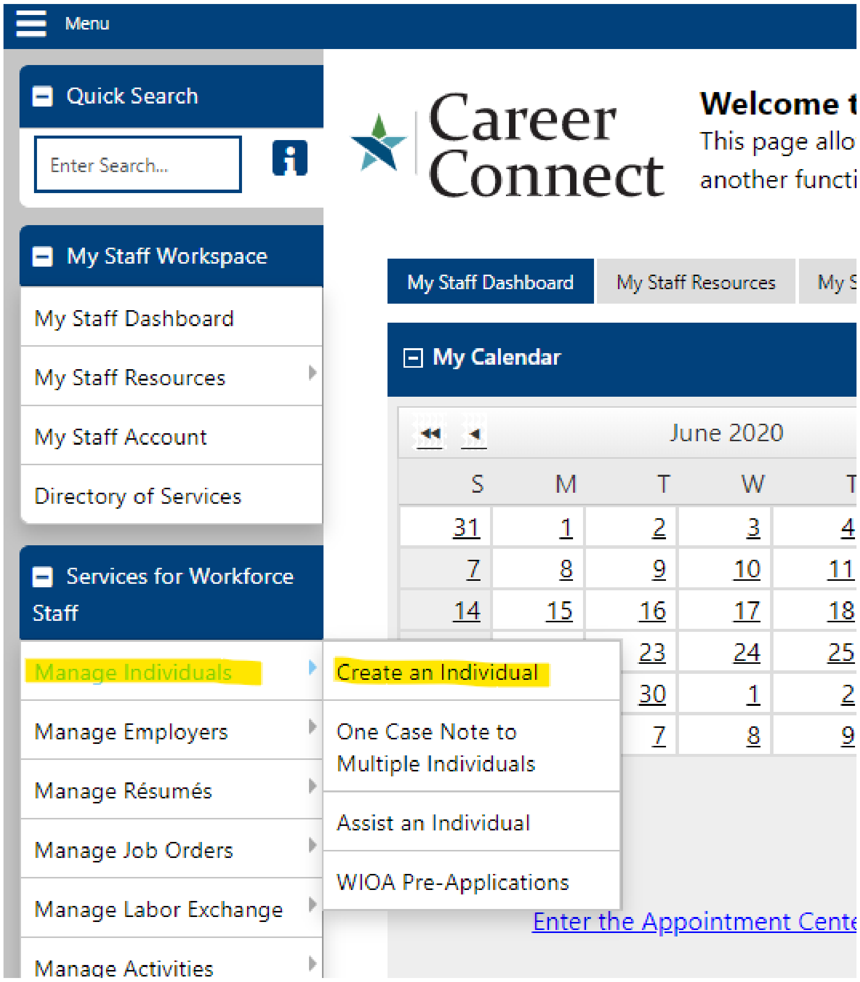
Step 1: Prior to creating a new client account, search Career Connect to make sure that the client is not already in the system.

- From the left-hand menu, select ***Manage Individuals > Assist an Individual.***
- On the search page, search for the client. The best options for searching are first name, last name, and last 4 of the SSN **<u>or</u>** date of birth.
- If the client is already in Career Connect, skip down to the "Recording Client Consent" towards the end of this document.

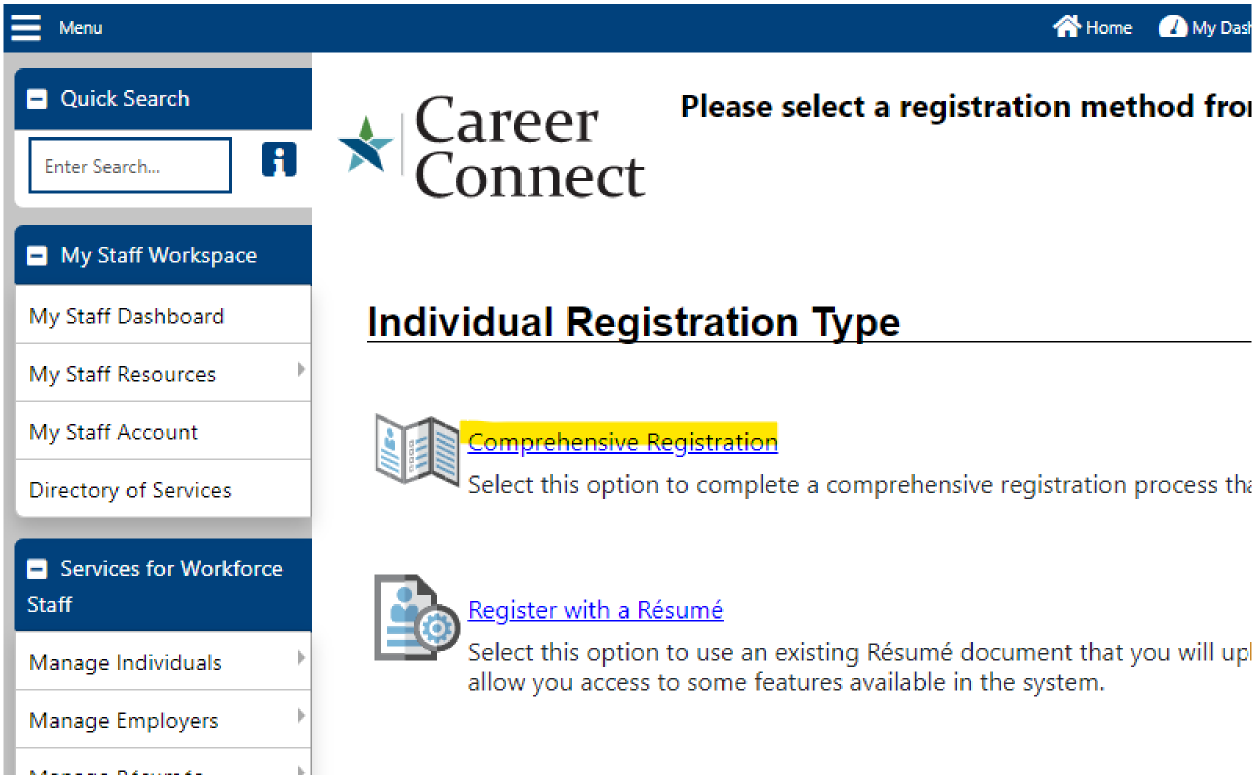




Step 2: Once you have confirmed that that client is not already in Career Connect, go to ***Manage Individuals > Create an Individual*** to create the client profile.



Step 3: Click on “Comprehensive Registration”



Step 4: The Comprehensive Registration will walk you through approximately 12 screens.

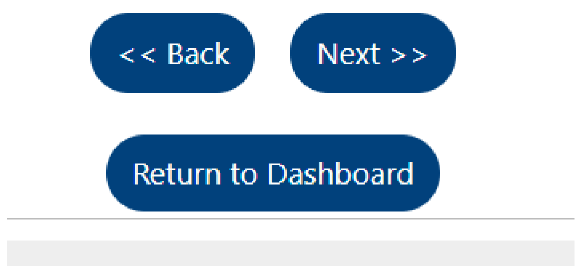
For all screens seen during registration, keep the following in mind:

- If you leave registration without finishing all pages, **<u>you will lose all entries and need to start again</u>**. If you try to leave without completing the registration, a pop-up message will warn you.

- You can click the Information icon on any screen for more help (e.g, definitions of terms, descriptions of controls). If the page has multiple sections, separate icons may be available for each section to the right of the section title. For other pages, one icon displays at the top of the page.

- A red asterisk (*) means that the field is required. If you do not supply required data, when you click Next>> to move to the next page, you will get an alert indicating any missing data (at the top of the page). If you are unsure of how to answer a question, just do the best you can – you or your client can update the information later

- If you need to return to the previous page, click the <<Back button at the bottom of the page. **<u>Do not use the browser's back arrow – you may lose data if you do.</u>**

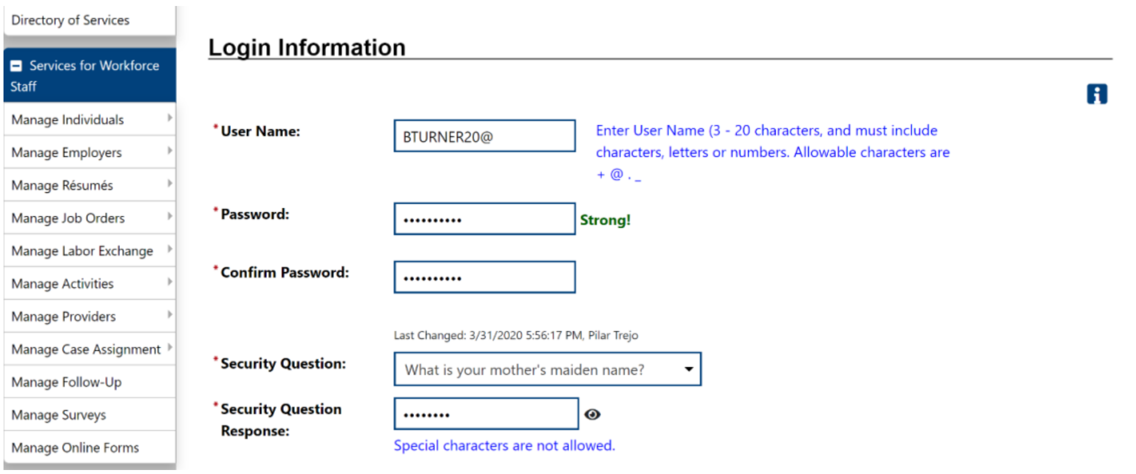


Step 6: **Login & General Information**

The first part of the Registration has separate sections for Login, Social Security Number, Primary Location, E-mail Address, and Demographic Information.

- For the **User Name** use the first initial and last name. For example, Jose Patel would be jpatel. If there is already another client with the same username, the system will alert you, just add a number onto the end of the user name (e.g. jpatel1).

- **Password & Security Question**: Do not change the Password or Security Question.

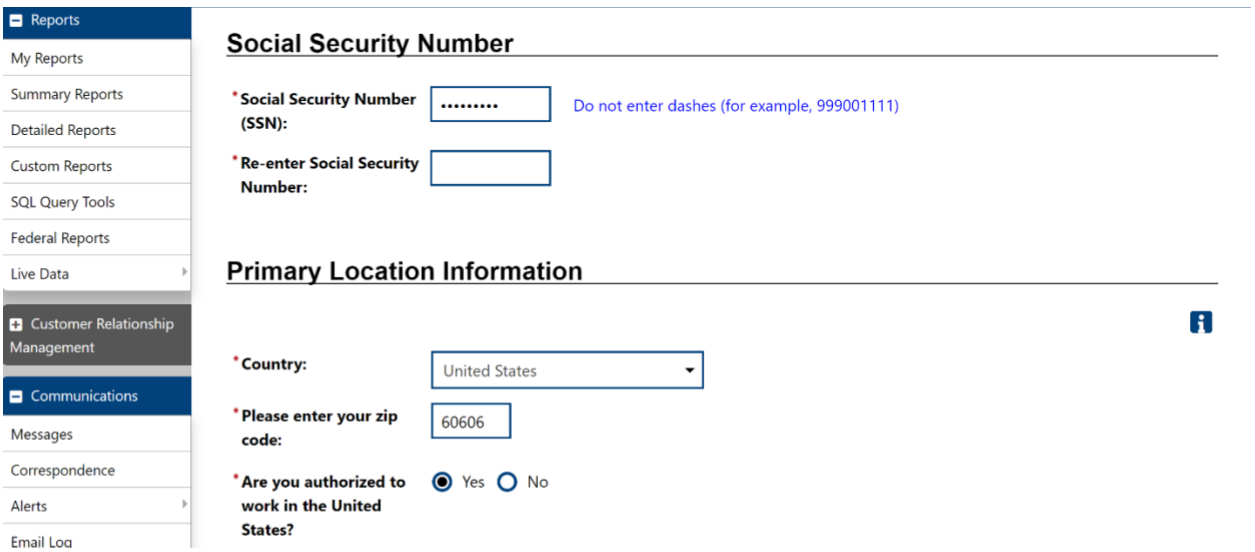


- Enter the client's **Social Security Number (SSN)**, then re-enter to confirm. Do not enter dashes. The system confirms that the Username and SSN are unique. If either already exists, a message prompts you to enter unique data.

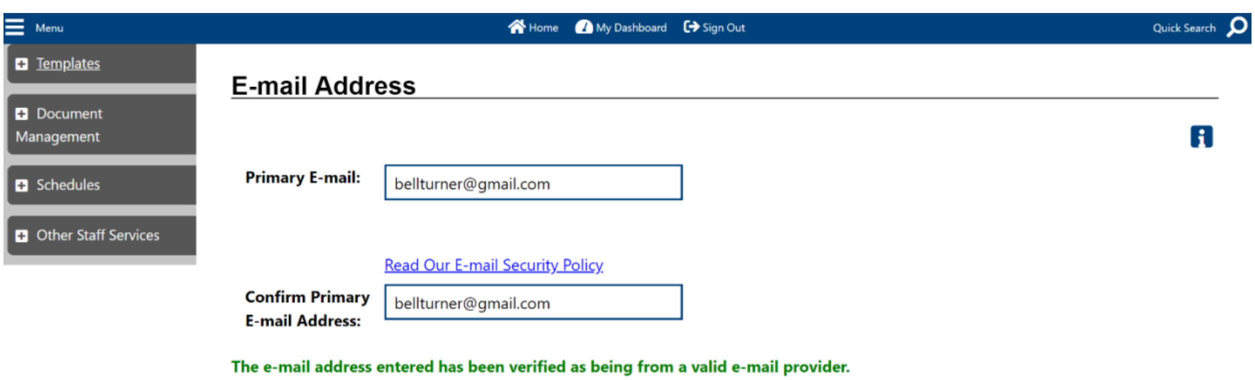
- Enter the client's **zip code**.

- Answer the Authorized to work in the United States question. (This is only used if the client is going to be enrolled in WIOA Title I or another workforce/job placement program.

- Enter the **Primary E-mail** address, and re-enter it in **Confirm Primary E-mail**.



- If the emails do not match, the fields will turn yellow to alert you. (The system will send the client an email to confirm registration.)

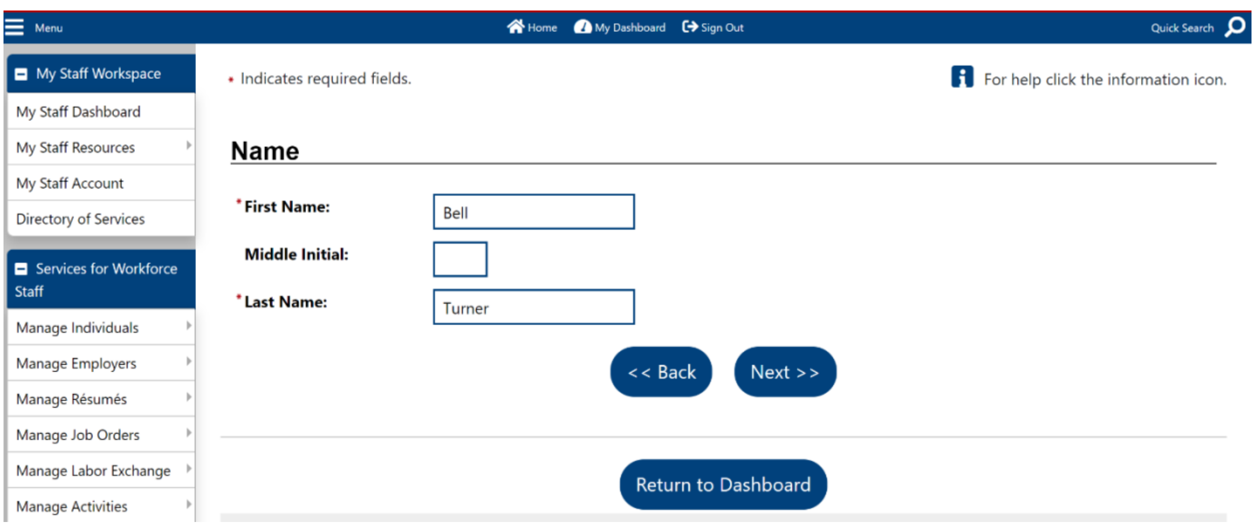


- Enter the required demographic information, including entries for:
    - **Date of Birth**
    - **Gender**
    - **Have you registered with the Selected Service? (if applicable)**
      Note: A link below this field lets you open a separate window to the online Selective Service Registration system, where you can register, if necessary.

Step 7: Name

- Enter the **First Name**, **Middle Initial** (optional), and **Last Name**.

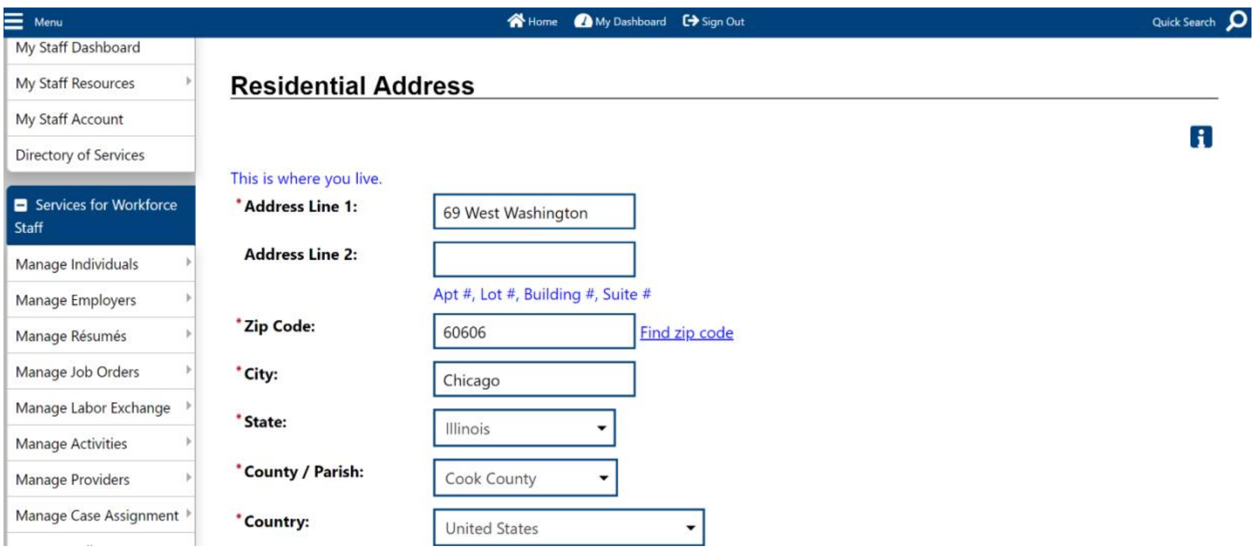
- Click the **Next >>** button to continue.

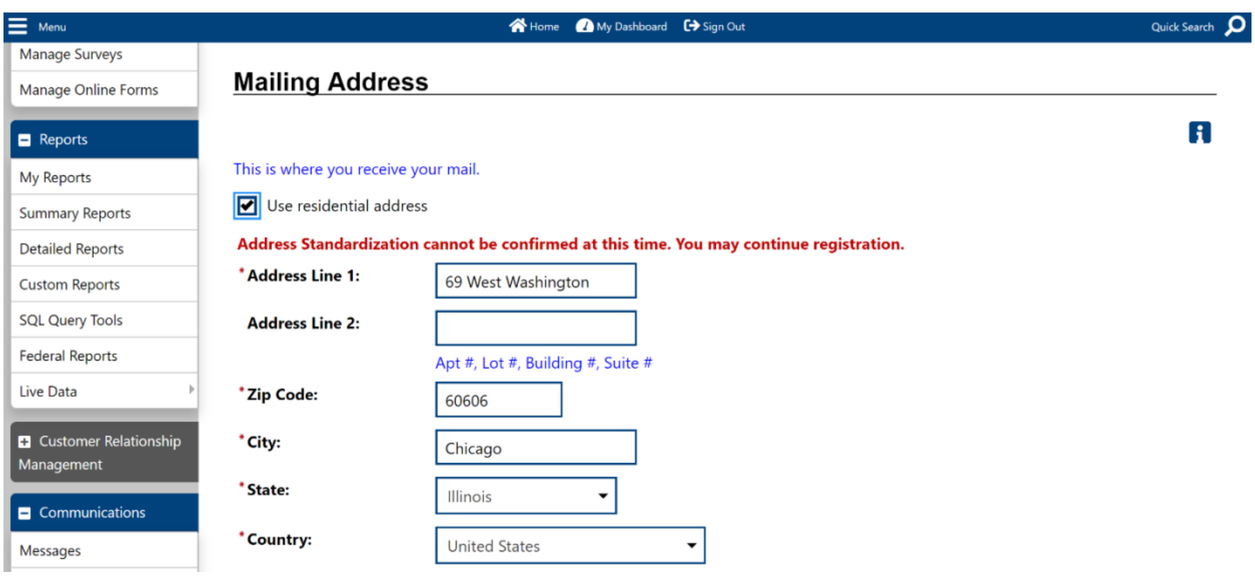


Step 8: **Address**

This part has sections for both Residential and Mailing address. Most fields are populated based on your earlier zip code entry.

- Enter the address where the client lives in the **Residential Address** area
- Enter the address where the client receives mail in the **Mailing Address** area. If the Mailing Address is the same as the Residential Address, check the **Use residential address** box.
- **Note:** The system attempts to standardize the mailing address to USPS requirements and will display an "Address has been standardized" message, if successful.
- Click the **Next >>** button to continue.

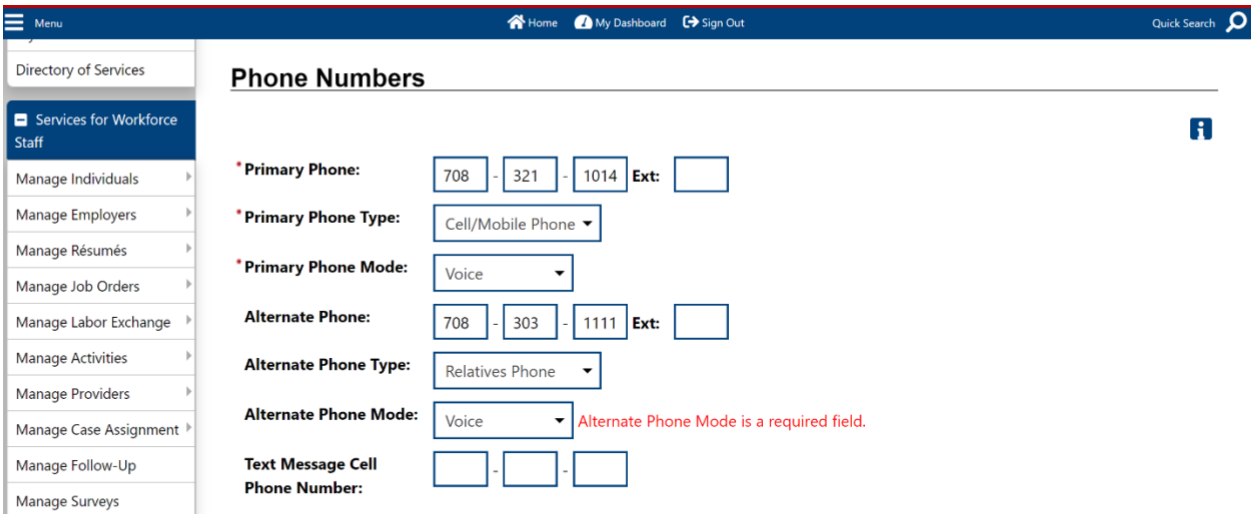




Step 9: Phone Number(s)

This page has fields for entering a primary phone number as well as an alternate phone number for contacting you. Entering a primary phone number is required. ***We strongly encourage adding an Alternate Phone number as well.***

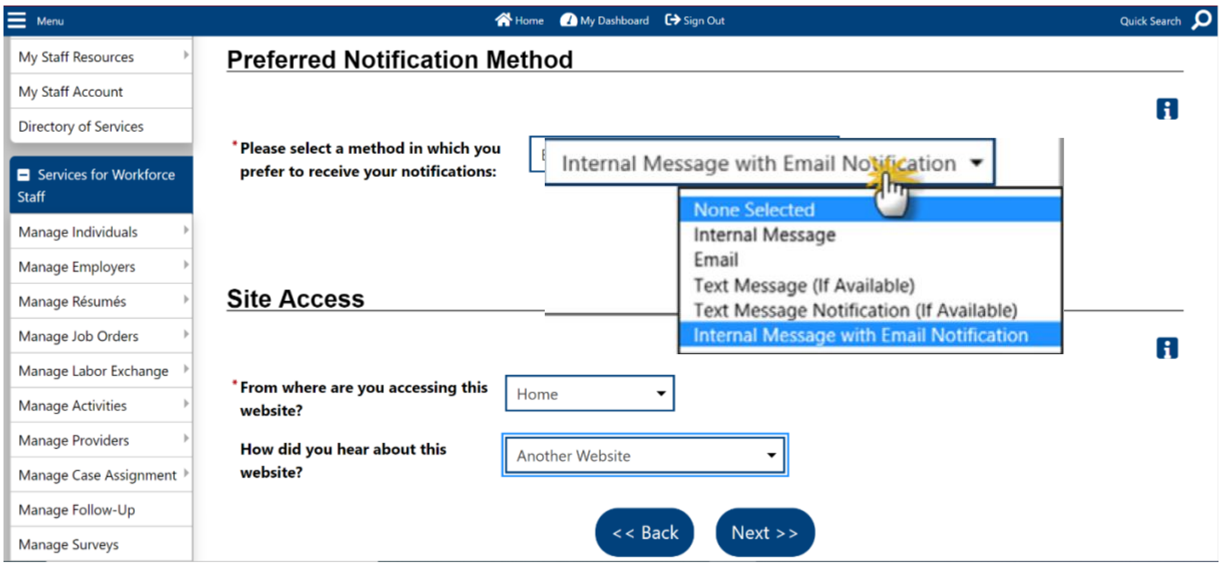
- Enter the number for the **Primary Phone** and select the **Primary Phone Type** and **Primary Phone Mode**.
- If desired, also enter data for an **Alternate Phone**.
- **<u>Do not</u>** add a “Text Message Cell Number”.
- Click the **Next >>** button to continue.



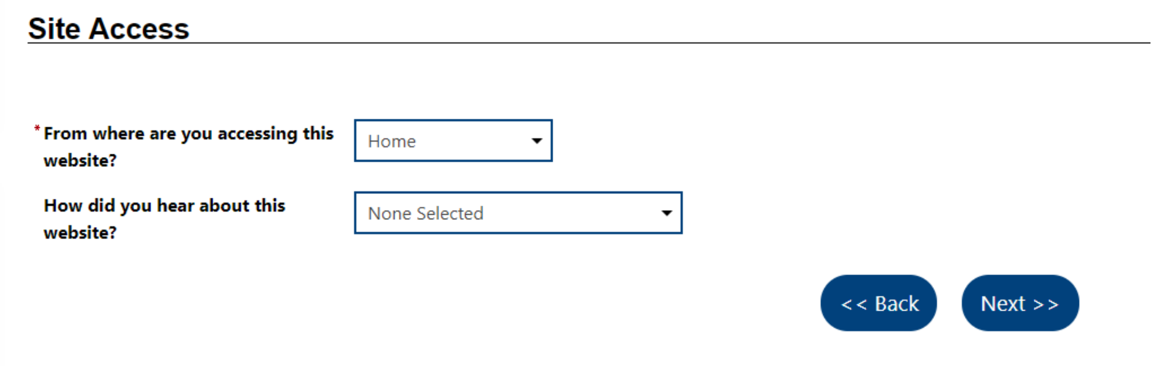
Step 10: Preferred Notification Method and Site Access

This page has fields for client account's notification preference setting.

- If the client will be logging into Career Connect, select "Internal Message with Email Notification".
- If the client will not be logging into Career Connect, select "Email".
- **<u>Do not select either of the text message options</u>**.

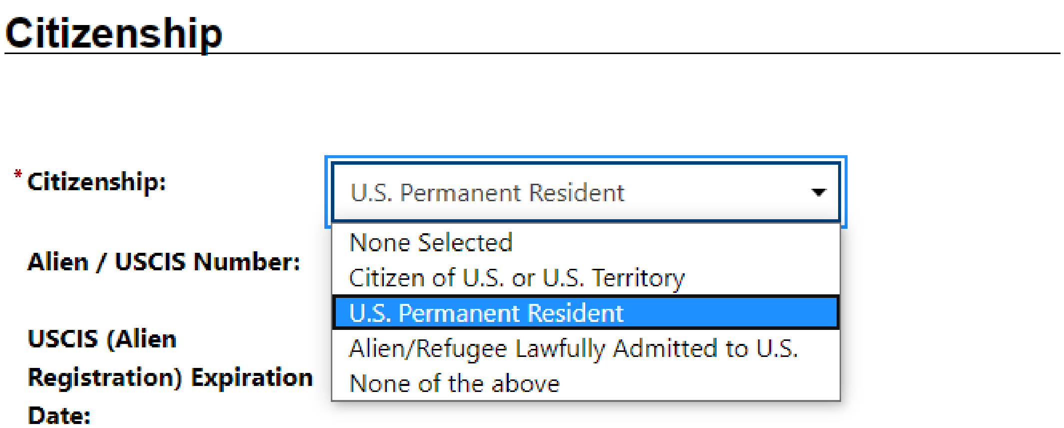


- For "Site Access" select the appropriate option, or, if not applicable, select "Other".
- Leave "How did you hear about this website" as "None Selected"



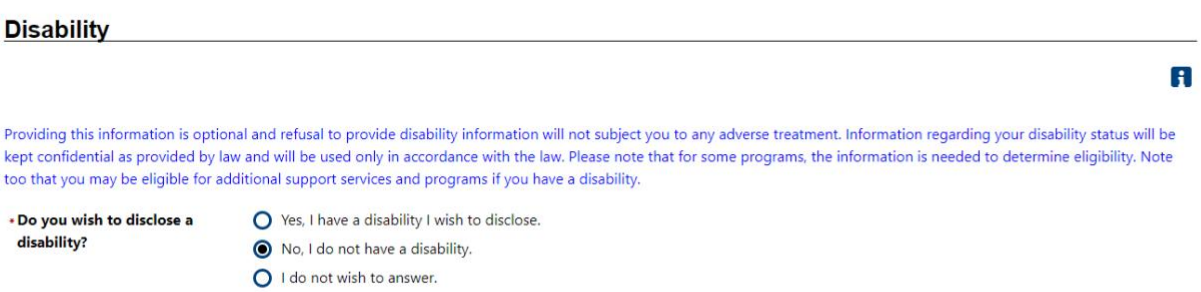
Step 11: Citizenship & Disability

- **Citizenship** status – is primarily used for WIOA Title I enrollment, since clients must be authorized to work in the U.S. to receive Title I services.
- The system provides 4 options. **Do <u>not</u> select "None of the Above"**, because the system will not let you continue.
- If none of the other options reflects your status, select "U.S. Permanent Resident". (This data is not used unless the client enrolls in WIOA Title I services and it can be updated as needed if the client is eligible for those services in the future.)



- Make a selection for the **Disability** question. Disclosing a disability is entirely voluntary. If unknown, select "I do not wish to answer".

- Click the **Next >>** button to continue.

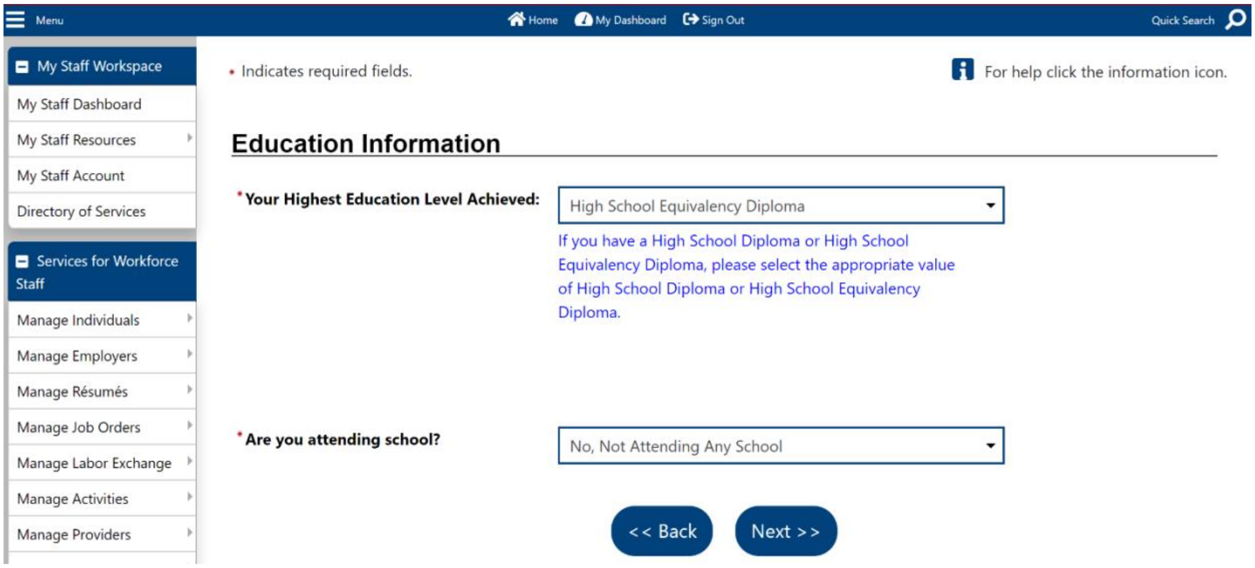


Step 12: Education.

- Select **Highest Level of Education** completed.

- Select whether the client is currently **Attending School,** including secondary school or post-secondary school or training.

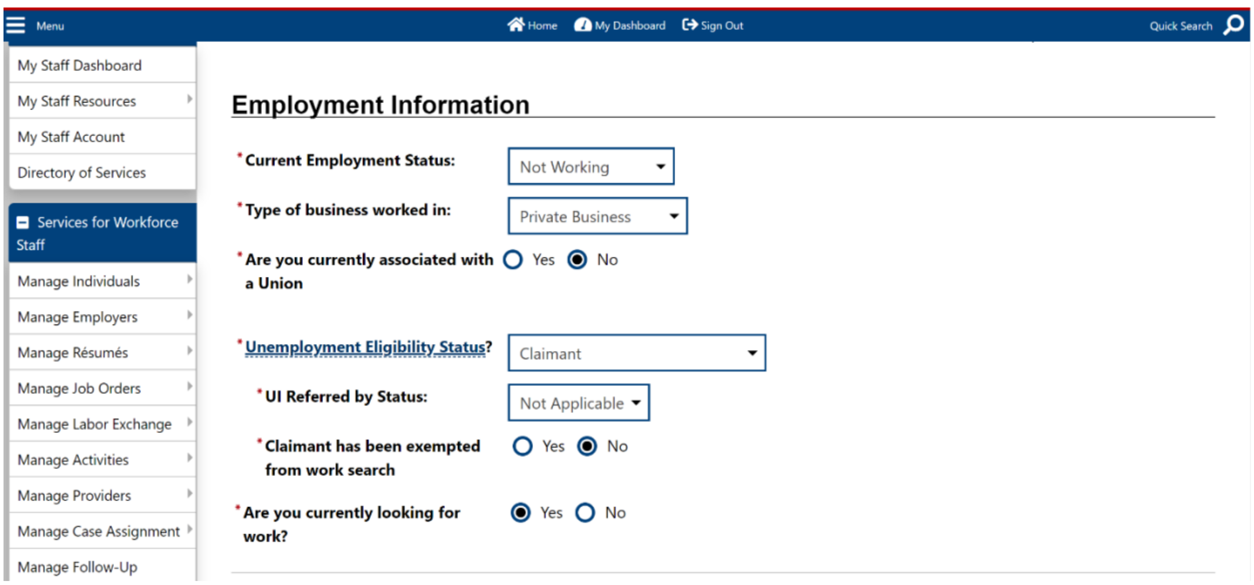
- Click the **Next >>** button to continue.



Step 13: Employment Information.

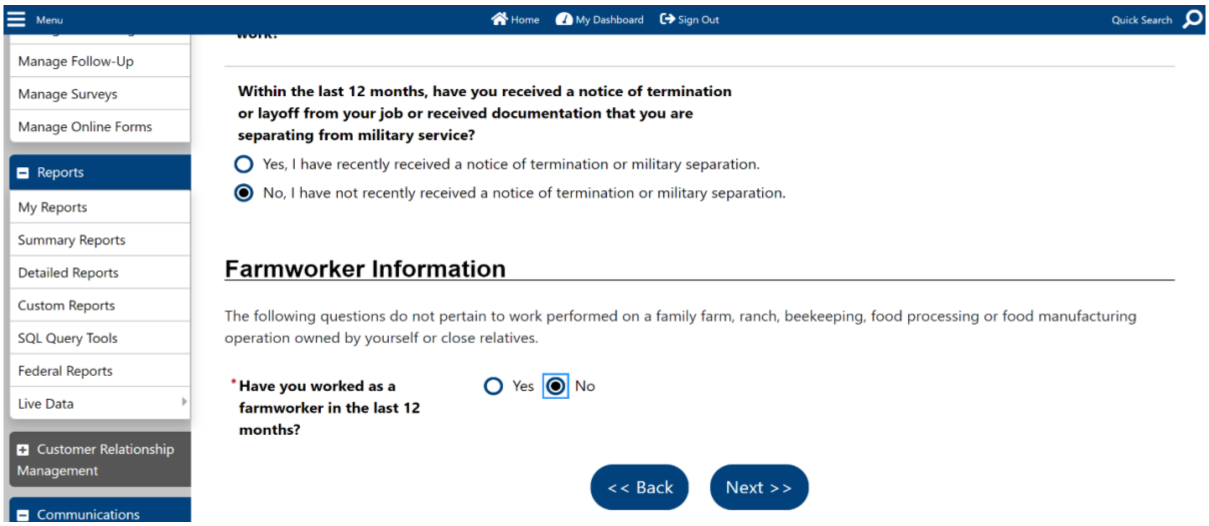
- In the Employment Information section, make selections from the drop-down lists, or radio button for all questions:
  - **Current Employment Status**
  - **Type of Business Worked In**
  - **Are you currently associated with a Union (If "*Yes*" additional questions will display.)**
  - **Unemployment Eligibility Status (If "*Claimant*" or "*Exhaustee*" is selected, additional questions will display.)** If you are not sure about Unemployment Status select "Neither Claimant or Exhaustee".

    Note: If you select "*Claimant*" for Unemployment Eligibility Status, you will need answer UI Referred by Status. If you are not sure select "*Not Applicable*".
  - **Currently Looking for Work**



- Indicate Yes or No for whether the client received a notice of termination, layoff, or military separation. If you select "*Yes*", additional questions will display.

  Note: If you select "*Yes*" for having received a notice of termination, the date of layoff is required.
- Answer the question about farm work.
- Click the **Next >>** button to continue.



Step 14: Desired Occupation

This page is used to identify the client's desired job. This occupation will be used throughout the system for job matching and other information connected with finding job opportunities.

- In the **What is your desired job title?** field, begin typing the title of a job in which the client is interested. A drop-down list will display the closest matches.

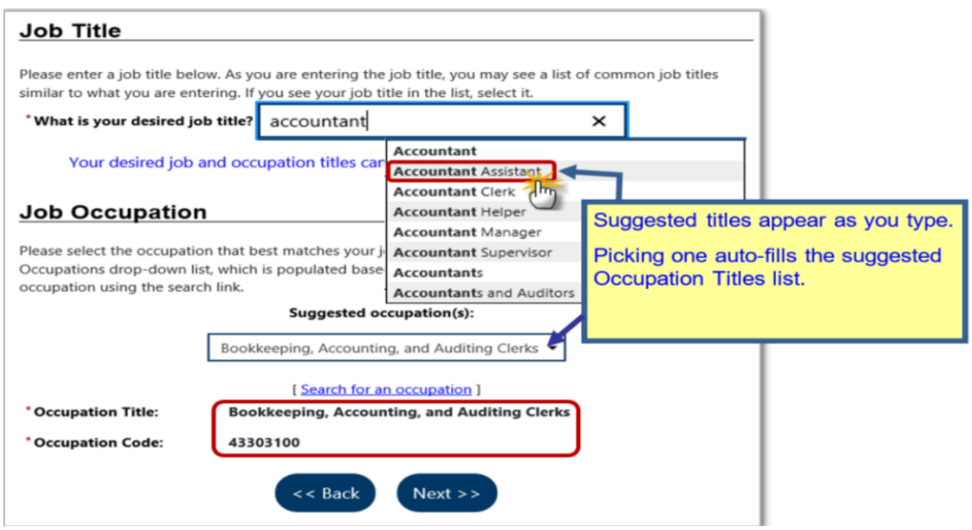
- Select a job title from the displayed list. This will populate a drop-down list below with **Suggested Occupations** field.

- Select an occupation from the **Suggested Occupations** drop-down list.

- The system will display the standardized **Occupation Title** and **Occupation Code** in the fields below the drop-down list. See below image:

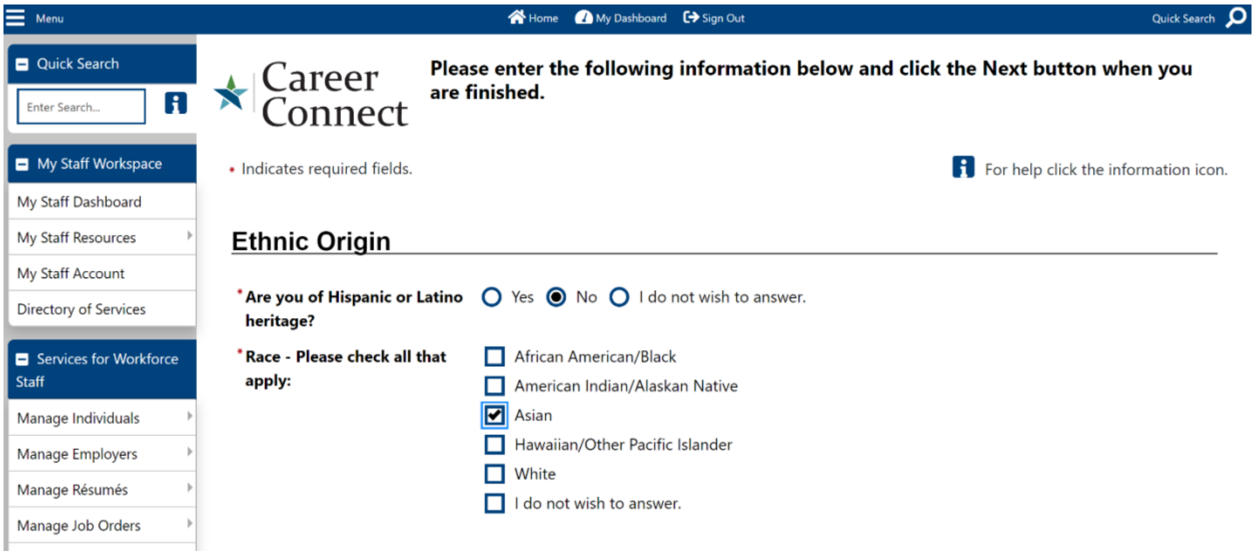
  > **Note:** If the job title you enter does not provide selections for the **Suggested Occupations** list, or if you want to search for a wider range of occupation codes, you can click the "*Search for an occupation"* link.

- Click the **Next >>** button to continue.



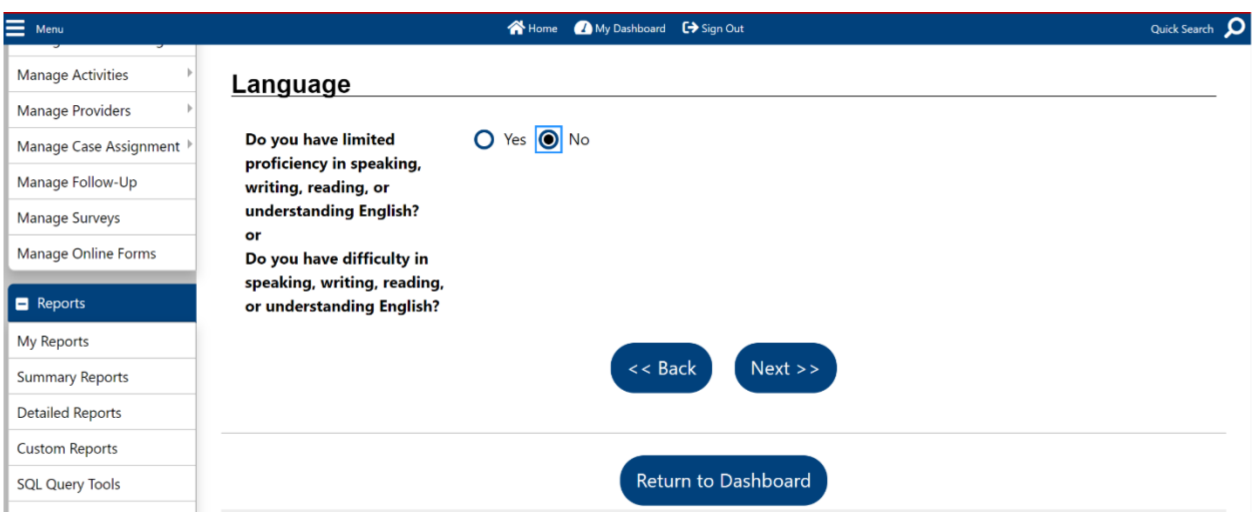
Step 15: Ethnic Origin

- Make selections for **<u>both</u>** heritage (**Hispanic or Latino**) and for Race. If you are not sure, do not guess. Instead select "I do not wish to answer".



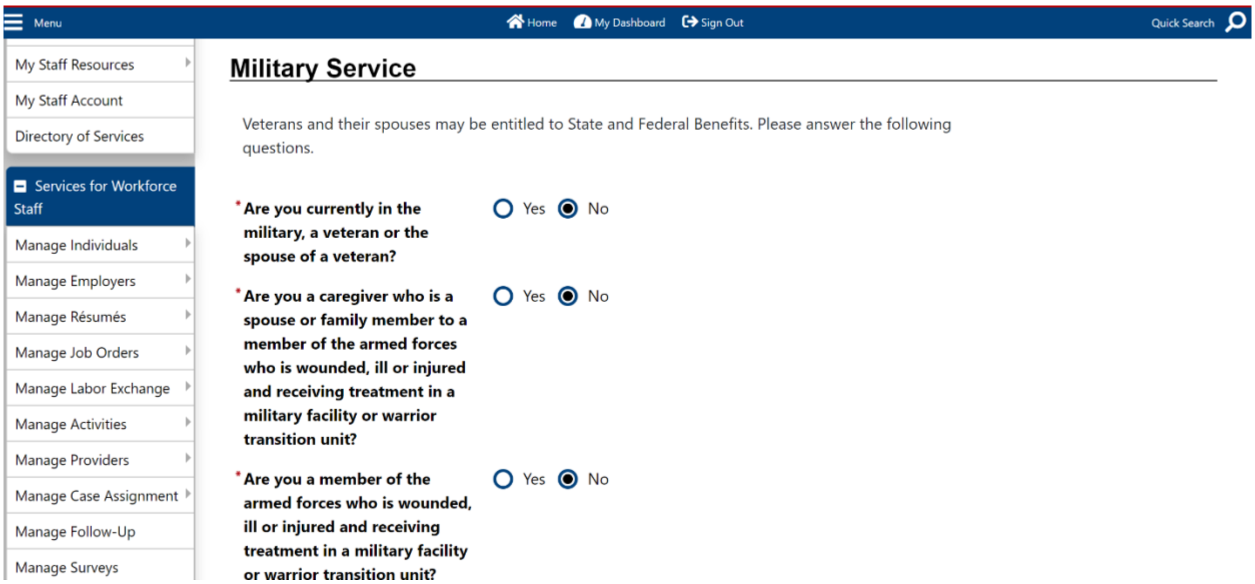
- In the **Language** section select "Yes" if the client has difficulty speaking, reading, writing and/or understanding English. If so, additional questions will display to help define the client's language needs.

- Click the **Next >>** button to continue.



Step 16: Military Service.
This page is used to identify military/veteran status. Veterans or qualified spouses may be entitled to additional services.

- Answer the Yes/No questions to indicate military service, if any.
- If you answer *Yes* to the first question, additional questions will appear on the page.
- Answer all required questions in this section.
- Click the **Next >>** button to continue.



Step 17: Public Assistance
This page is used to identify public assistance the client may have received within the last six months.

- Indicate Yes or No for any assistance received ***in the last six months*** from the listed assistance programs.
- If the client is not receiving any Public Assistance, you will receive a question about family size and income. You may choose not to answer.
- Click **Finish**. The system performs a final validation of all information entered and saves your profile.

Public Assistance

Please provide answers to the following questions if any apply within the last 6 months.

* **Has your household received Temporary Assistance for Needy Families (TANF) payments?**	○ Yes ◉ No
* **Have you been determined eligible for or received Supplemental Nutrition Assistance Program assistance (SNAP formerly known as Food Stamps)?**	◉ Yes ○ No
* **Have you received General Assistance Payments?**	○ Yes ◉ No
* **Have you received Refugee Cash Assistance Payments?**	○ Yes ◉ No
* **Have you been supported through the State's Foster Care System?**	○ Yes ◉ No

<< Back Finish

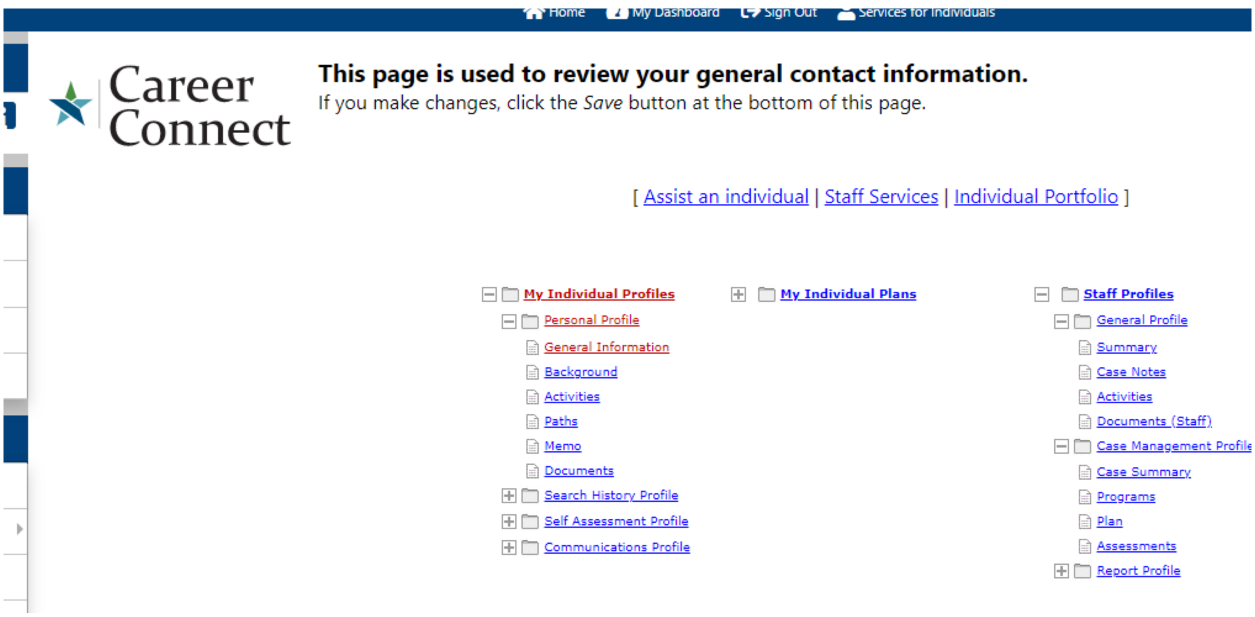
Step 18: Recording Client Consent

After completing and saving the client profile, you must go back in and record the client consent that you obtained in Step 1.

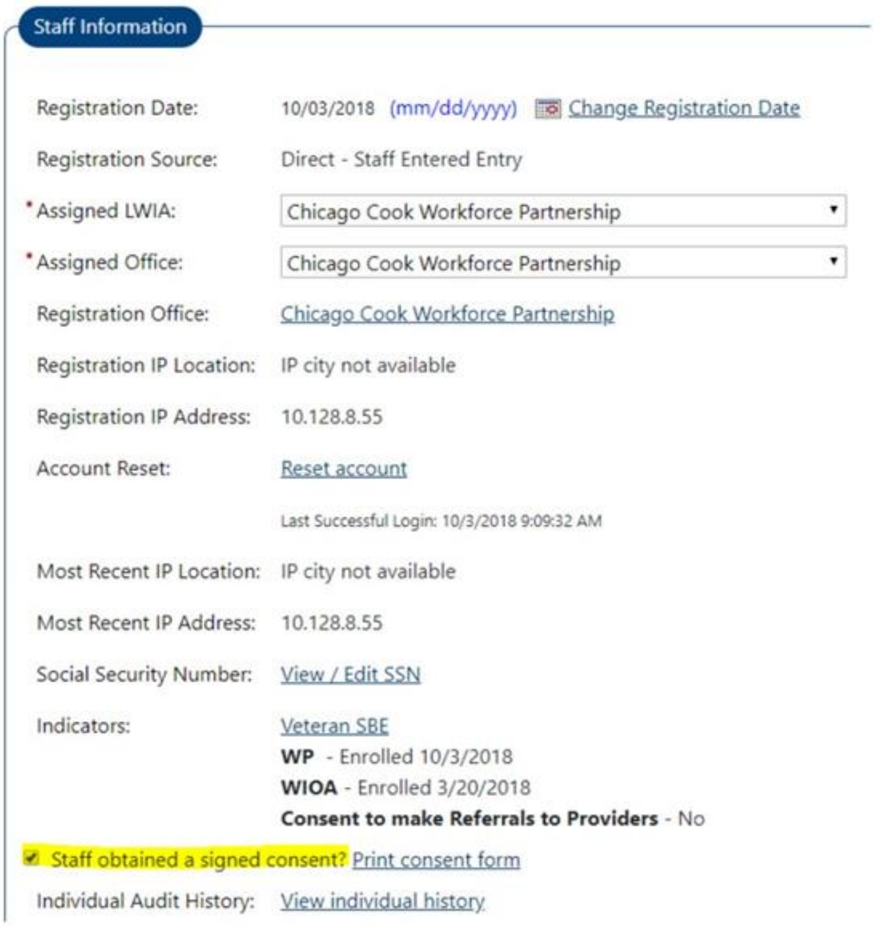
DO NOT COMPLETE THIS STEP UNLESS YOU HAVE A SIGNED CLIENT CONSENT FORM.

1. Find the client in Career Connect by going to ***Manage Individuals > Assist and Individual*** and searching for the client.

2. If you are not automatically taken to the Profile, use the top menus to navigate to ***My Individual Profiles > Personal Profile > General Information.*** Click on the "+" sign next to the menu to expand the options.



In the “Staff Information” section of the profile check the “Staff obtained a signed consent?” box. Scroll down to “Save” the profile.



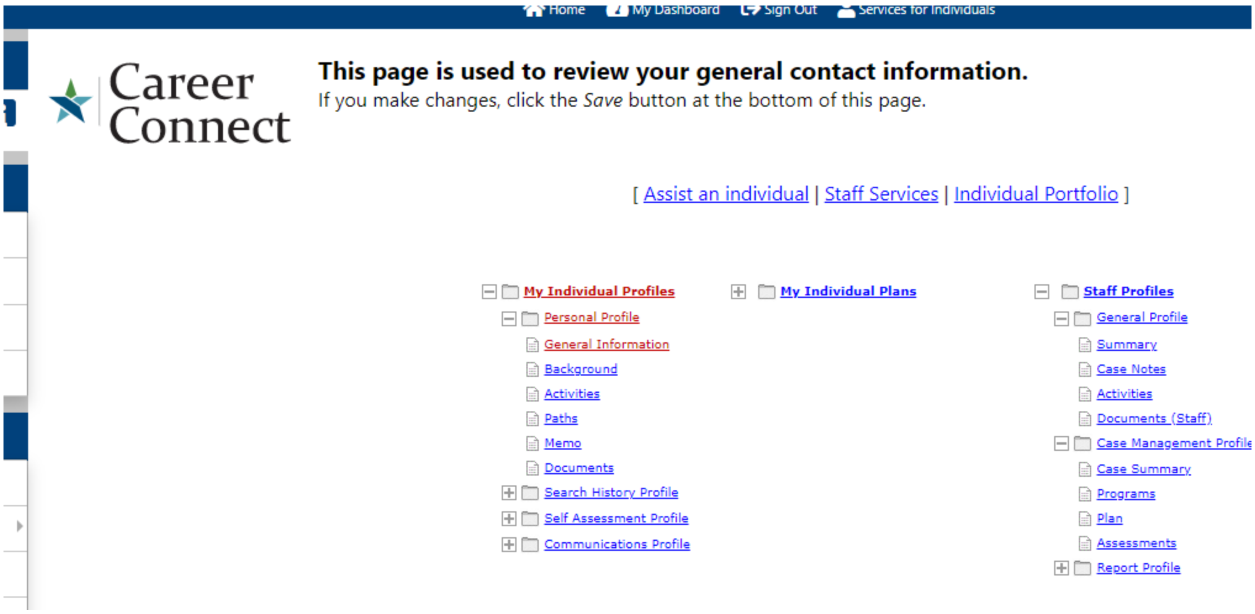
Congratulations! Your client’s profile is now complete!

You may update or edit the profile at any time by following the instructions below.

Editing / Updating the Client Profile

Step 1: Find the client in Career Connect by going to ***Manage Individuals > Assist and Individual*** and searching for the client.

Step 2: If you are not automatically taken to the Profile, use the top menus to navigate to ***My Individual Profiles > Personal Profile > General Information.*** Click on the "+" sign next to the menu to expand the options.



Step 3: Editing the Profile

Once you are in your profile, you can edit most of your information at any time. Just scroll to the applicable section, make your edits, and then scroll to the bottom to save.

> **Note:** Title II staff **do not** have access to view/edit the SSN or to edit the date of birth. If you need to make changes to either of these fields, contact Robert or Keona and they will assist you.

Resetting the Client Password

- Title II staff can reset client passwords, as needed if the client is logging in to the system directly.
- Click "Change Password" link.
- Reset the password to (case sensitive): Password1@
- Give the client this temporary password and they will be required to change it upon logging in. **Note:** clients can use the "Forgot Login Name/Password" on the Career Connect home page to automatically reset their passwords.

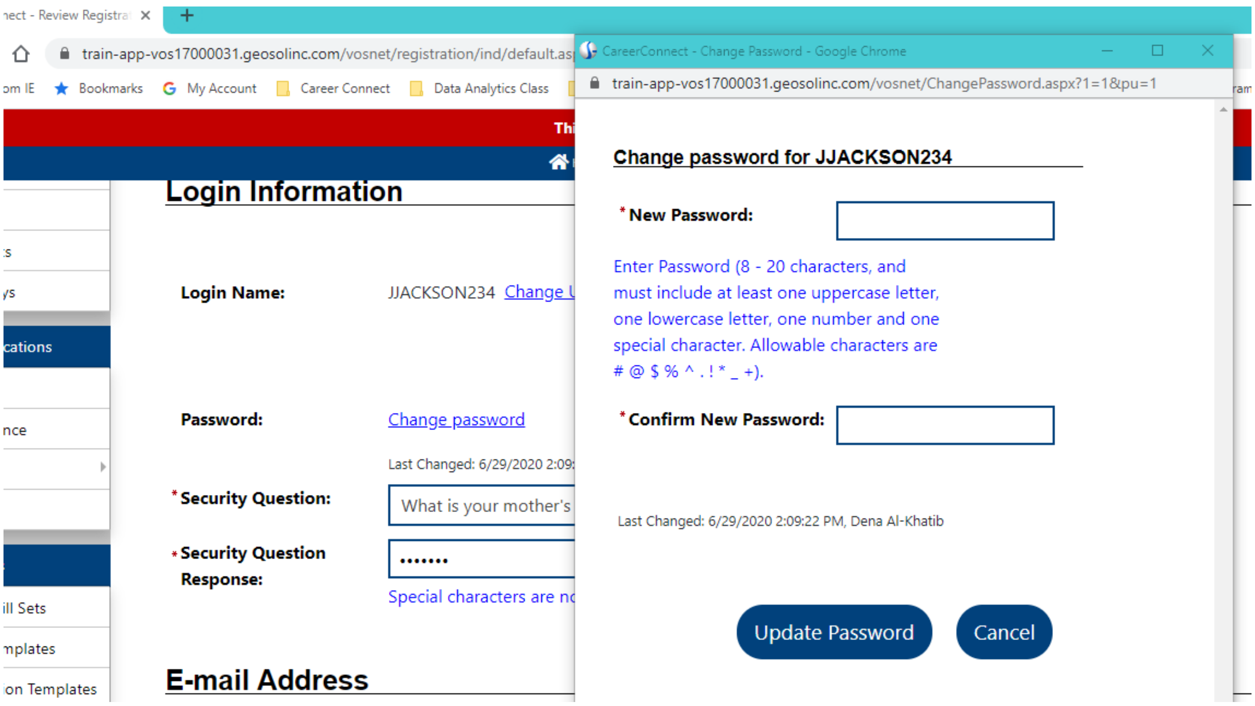


Exhibit A – Client Consent Form

Career Connect User Consent

As a registered user of the Chicago Cook Workforce Partnership's (The Partnership) Career Connect you will have access to staff-assisted services such as resume development, job search skills, job referrals, labor market information, and other workforce services. The information you provide to create your Career Connect account can be used in the following ways:

- Your resume, work history, and contact information are available to staff at workforce service agencies. Staff members may view your resume and work history to match you to jobs for which you may be qualified. Staff may contact you directly about a job opportunity or pass your resume, work history, and contact information on to an employer.
- The Partnership may work with researchers to analyze the quality and effectiveness of programs and services offered through Career Connect. This may involve information about you and the services you are provided going to a researcher. All researchers working with The Partnership must commit to strict confidentiality agreements and data protection standards. Neither The Partnership nor its research contractors will ever publicly release information specifically about you. Additionally, you may be contacted to participate in evaluations and/or customer satisfaction surveys.
- Equal Employment Opportunity is the Law. All agencies providing services through Career Connect must follow local, state and federal equal opportunity and nondiscrimination laws. You can read our full Equal Employment Opportunity statement here.
- Your contact information will not be sold and will not be used to send junk email. You can read our complete privacy policy here. Use of Career Connect constitutes acceptance of all the terms and conditions of the privacy policy.
- Use of Career Connect constitutes acceptance of all Terms of Use.

By signing below, you agree to all the above terms and conditions of Career Connect.

________________________________ ________________

Signature Date

____

Print Name