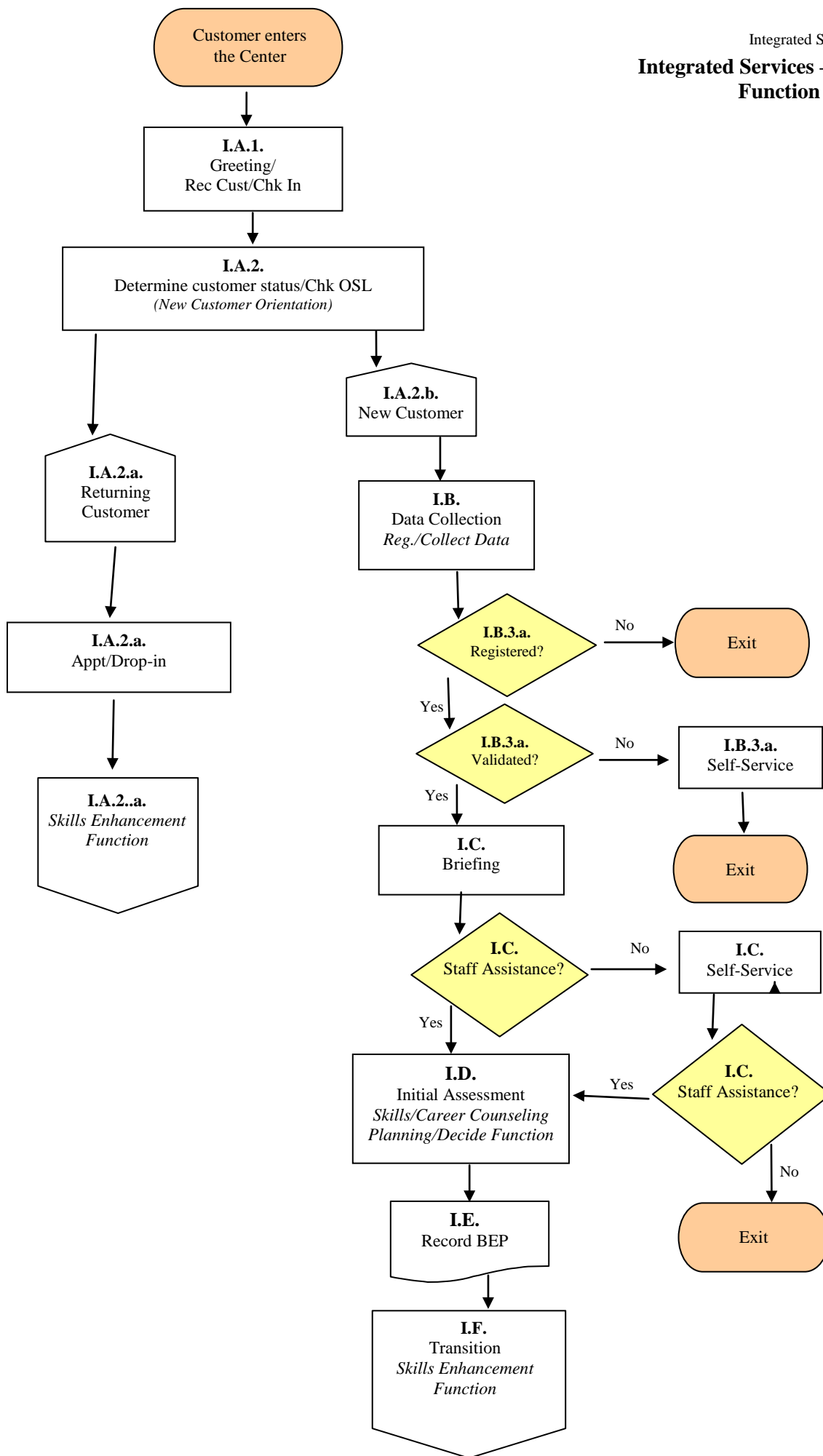


Integrated Services Welcome Function

Integrated Services – Welcome Function



**Oklahoma
Integrated Service Delivery
Model Procedures for Workforce Center**

I. Welcome Function

A. Initial Process

Customers will be received by a Welcome Function staff member(s) assigned by the team supervisor for the initial process.

1. Greeting

- a. Receiving Customers - Upon entering the center, customers should be acknowledged immediately by the assigned staff member(s) with, “Welcome to the Center,” and if all staff are busy, inform the customer that someone will be with them shortly. When staff are available, ask them, “What brought you to the Center today?” If they have a non-center related request or need (e.g., where is the bathroom, where do I go to get my drivers license, how do I get food stamps, etc.) direct customers to their destinations. In cases where referral services are needed, review community resources or the JOIN website (URL <http://www.join.ok.gov/>) for assistance.
- b. Customer Check-In – All customers desiring center services should check in. This check-in process will provide information to:
 - Accumulate a count of people using the center
 - Determine the order in which people will be served and how long they have waited
 - Allow data for a time study of high and low customer traffic in the center
 - Reason for visit

2. Determine Customer Status – Staff will check the status of each customer by using Oklahoma Service Link to determine if the customer is new or returning.

- a. Returning Customer – A customer that has an open enrollment(s) and has data validation completed.
 - 1) Appointment - Customers that have an appointment with a staff member or to work on an activity (e.g., job search, resume preparation), will be asked to have a seat. The appropriate staff member will then be notified that they have a customer waiting.
 - 2) Drop-in – Identify customers’ need and check with appropriate staff availability and immediate service or schedule an appointment. Staff will ensure that customers are aware of available services and allow for questions.
- b. New Customer – A customer that does not have an Oklahoma Job Link registration or has an incomplete registration. A customer would also be considered new if they have not completed data validation or if they have program enrollments that have closed.

Customer Orientation – The orientation should be provided to all new customers. The following points should be reviewed:

- 1) Customers must register and complete data validation to receive the necessary integrated services that will assist in getting the job(s) they are seeking (e.g., skills upgrade, referral, etc.). Review the needed documents listed in the State’s Data Validation and Eligibility Determination Policy. Registration and validation will require approximately an hour.

- 2) Completion of OJL registration and data validation allows for the use of assessments that assist customers and Center staff in looking at their skills and goals to determine what services they need to obtain the job(s) they are seeking. Initial Assessment will require approximately one hour and thirty minutes.

If customers do not have time to complete registration or do not have required documents to complete data validation, an appointment may be scheduled for the customer to return.

B. Data Collection (New Customer)

Instructions for collecting data and determining outcomes are listed below. Collected data is recorded in the OSL as described under the title “Documentation” at the end of this section.

1. Method of Data Collection

- a. Incomplete Registration or No Registration - Customers without registration or with partial registration that are seeking staff-assisted services (e.g., job referrals, upgrading skills, workshops, etc.) must complete registration and data validation. However, discretion should be used for customized hiring events (e.g., job fairs, mass hiring, etc.). Staff will complete the following steps:

- 1) Customers should complete the OJL registration screens in the office by means of self-service. Because registration is to be conducted online, staff should determine if there are specific obstacles for some customers. If one or more of the following conditions are identified, staff should discuss and determine methods to best address these obstacles:
 - a) Special Needs - Staff will accommodate with assistive technology when available or make other arrangements to accommodate special needs.
 - b) Customers unwilling to use computers or lacking basic computer skills – Customers may be intimidated or unwilling to use a computer to register online and may choose one of three options.

For customers needing to develop or polish skills necessary for working with the online registration and other services, the following online tutorials are available:

- <http://www.refdesk.com/factbeg.html> - links to Internet 101 and Mouse Tutorial
- <http://www.ckls.org/~crippel/computerlab/tutorials/mouse/page1.html> – (Mouserobics)
- <http://tech.tnlib.mi.us/tutor/welcome.html> (Available in Spanish)

If short term fundamental computer classes are available in the community, a referral may be made to one of those courses.

- 2) Staff will direct customers to use the “Let OJL Guide You” tutorial to instruct them in completing the resume.
 - 3) Staff must validate data according to the “Documentation” instructions at the end of this section.
 - 4) Staff must then review the “Universal Demographic Information” screen with the customers to ensure the eligibility date is current and all questions have been answered.
- b. Program Enrollment(s) Closed - Customers that have closed enrollments must see a staff person to review the “Universal Demographic Information.” This is to ensure the eligibility date is current

and all answers are up to date prior to receiving staff assisted services and being re-enrolled. Staff must always check to make sure data validation has been completed.

2. Data Collection Outcomes – There are three possible outcomes that may result from the data collection process for new customers.
 - a. Refused to follow center requirements – Some customers may not wish to adhere to center requirements and will not be eligible to receive staff-assisted service. Customers registering only will be allowed self-serve.
 - b. Registered and data validated – Customers will be provided initial assessment as the first staff-assisted service and will be co-enrolled.
 - c. Registered and under age of 18 – Customers cannot be co-enrolled in the WIA Adult program as a performance participant, but may be enrolled in LE because there is not an age requirement. Also, youth may be referred to a youth Case Manager to determine if they are eligible for the youth program.

Documentation

Registration will be conducted by using the “Create Job Seeker Account” in the Oklahoma Job Link (OJL)

Data validation will be documented in accordance with the States Data Validation and Eligibility Determination Policy. For further instruction and an OSL example, refer to II.A. of these procedures.

Review and answer any unanswered questions in the “Universal Demographic Information” screen.

C. Briefing

Staff will describe the steps customers go through in the Initial Assessment. Customers not wishing to participate in the Initial Assessment may decide to use self-service only. Customers that have registered and completed data validation will receive a briefing with the script provided below:

Step One:

In step 1, we help you identify the job in which you would be most interested, there are job opportunities, and provides you with wages that best fit your needs. There are two parts to this step. The first is an assessment of your foundational skills which will require about 10 minutes and the second is a brief process for determining or verifying your employment goal which will take approximately 15-30 minutes.

Step Two:

If you and the staff determine that you are not ready to go to work in your employment goal, then we have a variety of services that will upgrade or develop your skills so that you can compete for that job. If you need immediate employment, we can also help you with that. Remember, it’s your choice but the more skills you have the better chance you have to get the best job for you.

Step Three:

When you are ready to get the job, we have several services and very good staff to assist you in locating and obtaining the job.

That gives you a quick overview of your process and services. Do you have any questions? Do you have time to do these now? If not, we can schedule an appointment for you. When you are ready, we will begin Step One and the staff will explain in more detail about your options.

D. Initial Assessment

Initial Assessment results and other related information (e.g., work history) are used in the career counseling process to determine or verify employment goals, make recommendations, and serve as indicators for

determining the next function(s) in which customers will participate, and provide necessary data for completion of Basic Employment Plans (BEP). The processes and sequence for conducting the “Initial Assessment” are described below:

1. **Foundational Skills** – All new customers will participate in the KeyTrain Quick Guide Pre-Test to fulfill the initial skills assessment minimum standard and the results will be used to assist in determining or verifying the employment goal and the next functions(s) to which they will be assigned through the career counseling process. The foundational skills process will include the following topics:
 - a. Foundational Skills Introduction - Staff members should provide a brief overview of WorkKeys, Career Readiness Certificates (CRC), and how the Quick Guide Pre-Test may benefit them in attaining career readiness. Items covered may include how:
 - Pre-Test results may assist in selecting or verifying their employment goal
 - Identifying Foundational Skill needs may assist in obtaining their employment goal
 - b. Administration – The Quick Guide Pre-Test will be administered at the Workforce Center during the Welcome Function in a private and quiet area of the Center or they may be referred to an approved facility.
 - c. Results – The results will be used in the Career Counseling and Planning section of these procedures where a more detailed description is provided.
 - d. Exceptions - Refer to State policy for exception to Quick Guide Pre-Test administration.
 - e. Appraisal Process and Test Data Management – Staff testing, interpreting, and handling results of any appraisal process must comply with the standards stated in the Oklahoma Workforce Development Professional Code of Ethics (URL <http://www.workforceok.ou.edu/>).

2. Career Counseling and Planning

a. Purpose

The purpose of Career Counseling and Planning is to:

- 1) Determine or verify customers’ employment goal(s)
- 2) Use Foundational Skills to assist in developing or verifying the employment goal
- 3) Use assessment results to assign customers to next function or functions
- 4) Provide information for completing BEP

b. Determining or Establishing Employment Goal

The employment goal should be one in which customers have a probable chance for success, there are available opportunities, and an acceptable wage. There are two alternative methods that are designed to address individuals at different stages of selecting an employment goal. The first is a brief process that may be used to verify an existing goal or determine a new one. The second is for customers who need more intensive career counseling (e.g., career exploration, systematic decision making tools, more in-depth career assessment instruments, etc.). A brief description and the characteristics of customers needing each method are described below:

- 1) Brief Decision Making – This method is for customers who believe they have a firm goal in which they are ready for employment or have a desire to participate in a brief and concise method for determining their employment goal. The approach consists of staff members facilitating customers through a process that uses the Career Key Inventory, and related additional information. Instrument results and the related information

are used in the decision making process to verify or determine their employment goal(s). Detailed instructions for conducting this approach are provided in **Attachment A**.

- 2) Career Decision Making - Customers who have completed the Brief Decision Making method, but who are struggling to make a decision or are not confident in their decision, may complete the more intensive Career Decision Making process with career exploration and systematic tools for selecting goals. Because of the intensity and time required, this approach is better suited to the Skills Enhancement Function where an attachment with a process and instructions may be found. If needed, this will be the first service offered in the Skills Enhancement Function.

c. Assigning to Functions

- 1) Options

Once the employment goal is established, staff members will use results of the initial assessment section to determine the next function in which the customers will participate; Skills Enhancement, Job Getting, or both. Information from initial assessment may include:

- Employment goal or no employment goal
- KeyTrain Quick Guide Pre-Tests results
- Career Key codes that match occupation selected for employment goal
- Work History, certificates/credentials/license that supports employment goal
- Other related information

Samples for assigning customers to functions are provided in a guide as **Attachment B**.

- 2) Staff Discretion

Although these procedures indicate criteria for assigning customers to specific functions, there are no absolute answers in the initial assessment process and decisions made must be in collaboration with customers. Circumstances may dictate that staff members use professional discretion in following program policy. When deviating from these procedures, staff will document rationale in the OSL by clicking the link “Client Notes” on the Universal Information screen and recording it.

Documentation

“Initial Assessment” will be the first staff-assisted service in which customers will be co-enrolled. Enroll those 18 and over into both LE and WIA under the Program Registration section at the bottom of the Universal Information screen. Click on the underlined Workforce Investment Act and Job Service links to enroll. Make sure all demographic information is correct. Add the program by entering the enrollment date.

Add the first staff-assisted service (initial assessment) to each of the programs. This will co-enroll the customer in both programs.

Record results obtained from KeyTrain Quick Guide Pre-Test in OSL “Test Information.” Refer to instructions and example in II.B., of these procedures.

Record Holland Codes obtained from Career Key Inventory in OSL “Test Information.” Refer to instructions and sample in II.C. of these procedures.

Enter “Career Guidance” as the second staff assisted service.

Matching objective to employment goal

- Go to “Case Detail” screen for the individual
- In left margin click link “Objectives”
- Compare objective with employment goal(s)
- Review to determine if employment goal(s) doesn’t match objective; if not
- Click on “edit” and change your objective to match your new employment goal(s)

E. Basic Employment Plan (BEP)

The BEP contains the information from the initial assessment used to make decisions for assigning customers to Skills Enhancement, Job Getting or both. Refer to **Attachment C** for instructions to complete the BEP. Hard copies of customers’ BEPs will be printed and provided to them.

Documentation

The staff assisted service “Basic Employment Plan” is entered as a “quick service.”

The BEP will be completed by clicking the “Basic Employment Plan” link on the OSL Case Details screen and following the instructions provided in **Attachment C**.

F. Transitioning to Next Function

Once the next function or functions have been selected, and in instances where there will be a hand-off of the customer to another staff member, they will be accompanied and introduced to that staff member. Staff should conduct some service with them as soon as possible to keep them active in the system. If staff are not available, an appointment should be made and follow-up conducted to ensure the customer returns for their appointment.

II. Oklahoma Service Link Universal Information Fields

This section provides instructions and examples for those required OSL fields that have blank screens and no completion instructions. These fields are necessary for the Welcome Function and are accessed by links on the Universal Information screen. Instructions and samples are provided below:

**Integration of Services
Oklahoma Service Link (OSL) Universal Information Fields**

A. Registration and Eligibility Validation (Case Details Screen and click “Client Notes” link)

Instructions	Example
<p>Data Validation in “Client Notes” field: Staff must review acceptable source documents identified in States Data Validation and Eligibility Determination Policy. To validate from the Universal Information screen, click the link “Client Notes” and record.</p>	<p>DOB – Validated 04/17/02 with OK Birth Cert 06/10/54 SS Validated with Registration Card Eligible to Work Validated with SS Card and Photo ID</p>

B. Testing Information (Case Details Screen and click “Testing Information” link)

Instructions	Example
<p>Testing Information – From the OSL Universal Information screen, click the link “Testing Information,” Click “Other” and then “Add Test” and record.</p>	<p>Name of Test: KeyTrain Quick Guide Pre-Test Notes: Results from Quick Guide Pre-Test AM level: 75% RI level: 100% LI level: 25% Date Given: 04/17/2008 Contact Person: John Smith</p>

C. Testing Information (Case Details Screen and click “Testing Information” link)

Instructions	Example
<p>Testing Information – From the OSL Universal Information screen, click the link “Testing Information,” Click “Other” and then “Add Test” and record.</p>	<p>Name of Test: Career Key Inventory Notes: Codes R -12 E - 9 I - 4 Date Given: 04/17/2008 Contact Person: John Smith</p>

BRIEF DECISION MAKING (5-8-08)

Purpose: To Provide:

- Customers who do not have an employment goal or confidence in their selected goal a brief process for selecting one.
- A process for verifying a pre-determined employment goal.
- A process that will assist in selecting the next function
- Data for development of the BEP

Instructions: Staff members will facilitate customers through the process described below using the following tools:

- Quick Guide Pre-Test
- Career Key Inventory
- Oklahoma Service Link
- Career Counseling Worksheet

The brief decision making task requires a number of sophisticated skills and knowledge (e.g., assisting customers through a process of comparing their characteristics with those necessary for their selected employment goal, collaborating with customer to develop BEPs, etc.). Staff implementing this process should attend a related training course when offered or be trained and closely supervised by knowledgeable staff members who have the necessary knowledge and skills.

I. Administer Career Assessment Instrument and Gather Other Information

Access the Career Key Inventory online by using <http://www.growoklahoma.com>. Click on the tab “Explore Careers,” then click the “Career Key,” link and click the “Create an Account” link to receive a username and password. The Career Key is a valid instrument that measures interest, abilities, self-perception, and values. Administer Career Key and review the top three (3) codes; Realistic, Enterprising, Artistic, Social, Conventional.

II. Career Counseling Worksheet (<http://www.workforceok.ou.edu/>)

Determine if customers currently have firm employment goals or if they need to establish a goal(s) in which there are employment opportunities, they have a probable chance for success, and the wage is acceptable for them. Based on their responses, follow one of the two steps listed below:

A. Has Employment Goal

1. Verify SOC title and code – Verify that the correct SOC title and code is being used to describe the determined employment goal(s). To verify, use the OJL “Job Search Options” section and click the link “Search by Type of Job.” Conduct a “Keywords” search and use the link “Description” to find the proper title and code.
2. Determine Employment Opportunities for Employment Goal – While identifying the SOC title and code in the “Search by Type of Job” section, the searcher may click the “search” link to the right of their selected occupation and determine if there are available job opportunities. Staff may also return to the “Job Search Options” screen to search for opportunities on other job search related links (e.g., Job Spidering) for the goal they are reviewing. If there are other available sources to which the staff may have access, those may be used to identify current or future opportunities (e.g., industrial clusters occupations identified by LWIB, labor market

demand occupations, etc.) Opportunities in customers' goals should be identified before proceeding to the next step. For exceptions to this process, refer to "C. Staff Discretion" at the end of these instructions.

3. Review Customer Data in OSL – Review the following customer information from links on the OSL "Case Details" screen.
 - a. Top three Career Key codes scored on the Career Key Inventory (Testing Information)
 - b. Customers' Quick Guide Pre-Test results in (Testing Information)
 - c. Work history (Work History) from resume
 - d. Education and Training – (Education) from Demographic Information and (Education) from resume
 - e. Certificates/credentials/licenses (Education) from resume
 - f. Wage is acceptable for them (Self-Reported)

4. Collaboration – Refer to Career Counseling Worksheet (CCW) and locate customers' selected employment goal title under column B "Occupational Title." In conjunction with customers, compare their gathered data (e.g., Career Key scores, Quick Guide Pre-Test results, work history, education, past wages, etc.) with indicators listed in the worksheet title bar located at the top of the screen. Review with customers to determine if there are patterns that may be revealed (e.g., as best can be determined, Foundational Skills are comparable to skills in their selected employment goal and work history, training or education may be closely aligned with the education indicator for their selected goal, etc.). Comparing these indicators with the gathered information allows both customer and staff to make decisions about which function(s) in which they should participate. The more compatibility revealed between their data and the indicators the more significance may be given to customers being ready for the Job Getting Function. After reviewing and discussing each indicator with customers' data and any other related information, the following may be answered:
 - Are there employment opportunities available in the labor market for customers' employment goal?
 - Is there a probable chance for success in their employment goal (significant consistency between their data and that in the worksheet title bar; Career Key Codes, Foundational Skills, and work history, training, and/or education)?
 - Will customers' employment goal(s) likely generate an acceptable wage (based on the OESC's average wage indicator, provided on the CCW, for the selected employment goal(s))?

Note that data and indicators, even in an appropriate match, will probably not reveal a completely compatible pattern, but there should be enough consistency for staff and customers to conclude that there is a real chance for success if assigned to the Job Getting Function. During this collaborative process, any related information provided by customers should be factored into the final decision making when selecting the appropriate function. If the collaboration indicates customers are not ready for the Job Getting Function because of their need for more intensive career decision making, more assessment, or increasing Foundational Skills, customers may be assigned to the Skills Enhancement Function.

B. Has No Employment Goal

Career Counseling Worksheet (CCW)

1. Review Customer Data in OSL – Review the following customer information from links on the OSL “Case Details” screen.
 - a. Top three Career Key codes scored on the Career Key Inventory (Testing Information)
 - b. Customers’ KeyTrain Quick Guide Pre-Test results (Testing Information)
 - c. Work history (Work History) from resume
 - d. Certificates/credentials/licenses (Education) from resume
 - e. Education and Training – (Education) from Demographic Information and (Education) from resume
 - f. Wage is acceptable (self-reported)
2. Identify Favorite Occupation(s) – Click the “Sort by Key Code” tab on the CCW and find the “Career Counseling Worksheet” by customers’ top three Career Key codes. A cluster of occupations will appear that are generated by their codes as a result of the Career Key Inventory. For more alternative occupations, rotate order of codes and re-sort. Have customers’ identify favorite occupations. Attempt to narrow to a few related or single goal(s).
3. Determine Employment Opportunities – Determine if there are current employment opportunities by conducting job searches using the OJL “Job Search Options” screen. If there are other available sources to which the staff may have access, those may be used to identify current or future opportunities (e.g., industrial clusters occupations identified by LWIB). Opportunities in customers’ goals should be identified before proceeding to the next step. For exceptions to this process, refer to “C. Staff Discretion” at the end of this section.
4. Collaboration – Refer to Career Counseling Worksheet and locate customers’ selected employment goal title(s). Compare customers’ information obtained from the OSL with the indicators listed in the top title bar (e.g., Career Key Codes, Education, etc.). **Through collaboration with customers, determine if they have a probable chance for success in their employment goal(s) and the wage indicated on the worksheet would be an acceptable wage for them.** For more information on collaboration, refer to II.A.4. of this section. Have customers’ select employment goal(s). If they can’t select a goal, have them move on to the “Assigning Functions” process.

C. Staff Discretion

Exceptions to the above “Brief Decision Making” process may occur under certain circumstances. When exceptions occur, staff may need to use professional discretion in deviating from the procedures. If additional explanation is needed, record in the BEP comments section: Examples may include:

- An employment goal that a customer desires can not be determined an employment opportunity by reviewing any source of data, but staff working in Job Getting believes there is the potential for job development.
- A customer can’t make a decision using this process so is directed to the more in-depth career decision making component in the Skills Enhancement Function.

Career Counseling Worksheet								
Career Key Codes: A=Artistic; C=Conventional; E=Enterprising; I=Investigative; R=Realistic; S=Social								
Soc Code	Occupational Titles	Foundational Skills Levels			Career Key Codes	OK Average Hr Wage	License	Minimum Education Level
		AM	LI	RI				
11-3011	Administrative Services Managers	4	4	5	E-C-S	\$29.95	--	HSD or Assoc Deg
41-3011	Advertising Sales Agents	4	4	4	E-S-C	\$19.91		HSD
13-2021	Appraisers and Assessors of Real Estate	5	4	5	C-E	\$21.05	Real Estate Appraiser's License	Most Bachelors
49-3021	Automotive Body and Related Repairers	4	6	4	R-C	\$16.73		HSD/GED
49-3023	Automotive Service Technicians and Mechanics	4	5	5	R-C	\$16.73	8 possible areas (e.g., elect. sys)	HSD/GED/Formal Trng
51-3011	Bakers	4	4	4	R	\$10.34		HSD/GED/Formal Trng
43-3011	Bill and Account Collectors	4	5	6	C-E	\$10.36		HSD/GED
37-9099	Building and Grounds Cleaning and Maintenance Workers	4	5	6	Not Avail.	\$10.00		HSD/GED
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	6	5	5	R-C	\$17.38	Commercial Drivers License	HSD/GED
53-3022	Bus Drivers, School	3	4	4	R-S	\$11.38	Commercial Drivers License	HSD/GED
53-3021	Bus Drivers, Transit and Intercity	3	4	4	R-S-C	\$14.74	Commercial Drivers License	HSD/GED
51-3021	Butchers and Meat Cutters	3	4	4	R-E	\$12.66		HSD/GED
51-7011	Cabinetmakers and Bench Carpenters	4	4	4	R	\$12.34		--
47-2031	Carpenters	4	5	4	R-C	\$16.90		--
47-2041	Carpet Installers	4	4	4	R-E-I	\$16.05		HSD/GED
47-2051	Cement Masons and Concrete Finishers	4	4	3	R	\$15.06		HSD/GED
35-1011	Chefs and Head Cooks	3	3	4	E-R	\$15.09		HSD/GED
11-1011	Chief Executives	6	5	6	E-C-S	\$68.18		Bachelors Degree
39-9011	Child Care Worker	3	4	4	S-A	\$8.15		HSD/GED
21-1021	Child, Family, and School Social Workers	4	4	4	S	\$16.83		Bachelors Degree
13-1031	Claims Adjusters, Examiners, and Investigators	5	4	5	C-E	\$22.14		Bachelors Degree
53-7061	Cleaners of Vehicles and Equipment	3	3	3	R-C	\$8.47	May need Driver's License	--
27-2022	Coaches and Scouts	6	5	6	E-R-S	\$12.47		HSD/GED
51-9121	Coating, Painting, and Spray Machine Setters, Operators, and Tenders	4	4	4	R-C	\$12.75		--

SAMPLE

Adapted from SCOWIB Demand Occupation List

* for additional information refer to OKCIS, "Occupation" section and then "Preparation" subsection

ASSIGNING FUNCTIONS

Purpose: The purpose of this document is to provide a guide for assigning customers to an appropriate function and gather available data for BEP

Instruction: Collaborate with customers using assessment results and data from Career Counseling Worksheet to assign customers' to the most appropriate function or functions. Below are examples for providing direction.

Skills Development Function

- Needs more intensive career decision making
- No employment opportunity for goal, probable chance for success, or acceptable wage
- Needs comprehensive assessment (e.g., occupational skills, soft skills, supportive services, referral to another partner, etc)
- Apparently has Foundational Skill results necessary for employment goal and needs to take WorkKeys
- Apparently needs skill building (KeyTrain) based on pre-test results to attain identified Foundational Skill levels for employment goal and/or take WorkKeys
- Apparently has necessary Foundational Skill results for employment goal and wishes to increase skills and earn higher level CRCs

Job Getting Function

- Selected goal has employment opportunity, an acceptable wage, and there is probable chance for success
- Has necessary work history and/or certificate/license in goal and doesn't wish to take WorkKeys
- Apparently has necessary Foundational Skills for employment goal and desires to seek employment

Skills Enhancement and Job Getting Functions

- Desires to seek employment in employment goal, but wishes to increase Foundational Skills levels and/or attain CRCs while seeking employment and/or working
- Desires to become job ready in goal using skills enhancements, but must seek employment in job getting for an acceptable wage

BASIC EMPLOYMENT PLAN (BEP)

I. Instructions

A. Introduction

After completing the initial assessment and making collaborative decisions with customers, information will be recorded in the BEP.

B. BEP Interview Instructions

The BEP uses a structured format that may be typed or copied and pasted in the Universal Information “Basic Employment Plan” screen. After the format is entered in the blank screen, information from the initial assessment should be recorded according to the instructions provided below:

1. Employment Goal - Record customers’ employment goal that was established in the Career Counseling and Planning section of these procedures. If customers are unable to establish a goal using the brief methods provided in the “Welcome Function,” they should be assigned to Skills Enhancement for further career decision making.
2. Foundational Skills – Record customers’ levels needed for their employment goal in the “Needed” column and the Quick Guide Pre-Test results in the “Pre-Test” column. If the results reflect a 75% or 100%, the level may be considered **at least a three**. However, in determining the need for Foundational Skills remediation, all other indicators in the “Brief Decision Making” and “Assign Next Function” tasks should be taken into consideration. For more detail refer to instructions in Attachment A, section II.A.4. “Collaboration” and Attachment B “Assign Next Function”
3. Comments – Record the next function selected and provide rationale.

II. BEP Sample

Click “Basic Employment Plan” link on the Case Details screen to receive the BEP screen and add information as described in the model below:

INSTRUCTIONS	SAMPLE								
<p>Employment Goal Record the employment goal title resulting from a decision making or verification process. If one or more can’t be determined, record “none.”</p>	<p>Goal: Carpenter</p>								
<p>Client Responsibilities and Agency Responsibilities 1. Record customers’ Pre-Test results in the “Pre-Test” column and the levels needed for the employment goal in the “Needed” column. 2. Comments – Record next function(s) in which customers will participate, any recommendations, and rationale.</p>	<p>1. KeyTrain Quick Guide Pre-Test Results</p> <table style="margin-left: 40px;"> <tr> <td style="text-align: center;">Pre-Test</td> <td style="text-align: center;">Needed</td> </tr> <tr> <td style="text-align: center;"><i>AM level: 75%</i></td> <td style="text-align: center;">3</td> </tr> <tr> <td style="text-align: center;"><i>RI level: 100%</i></td> <td style="text-align: center;">3</td> </tr> <tr> <td style="text-align: center;"><i>LI level: 50%</i></td> <td style="text-align: center;">3</td> </tr> </table> <p>2. Comments: During the brief decision making process, customer data revealed she successfully completed several wood working classes in high school and had brief employment as a Carpenter’s helper. After discussing assessment results and other information from the brief decision making process, the customer and staff concurred that she would be assigned to Skills Enhancement for further assessment. The customer also agreed to increase her LI level to at least a 3 by using the KeyTrain curriculum.</p>	Pre-Test	Needed	<i>AM level: 75%</i>	3	<i>RI level: 100%</i>	3	<i>LI level: 50%</i>	3
Pre-Test	Needed								
<i>AM level: 75%</i>	3								
<i>RI level: 100%</i>	3								
<i>LI level: 50%</i>	3								

III. Customer Copy

Hard copies of customers’ BEPs will be printed from the OSL “Client Notes” field and provided to them.