JOB PLACEMENT AND RETENTION FUNCTIONALITY RESOURCE GUIDE

Rukmani Krishna

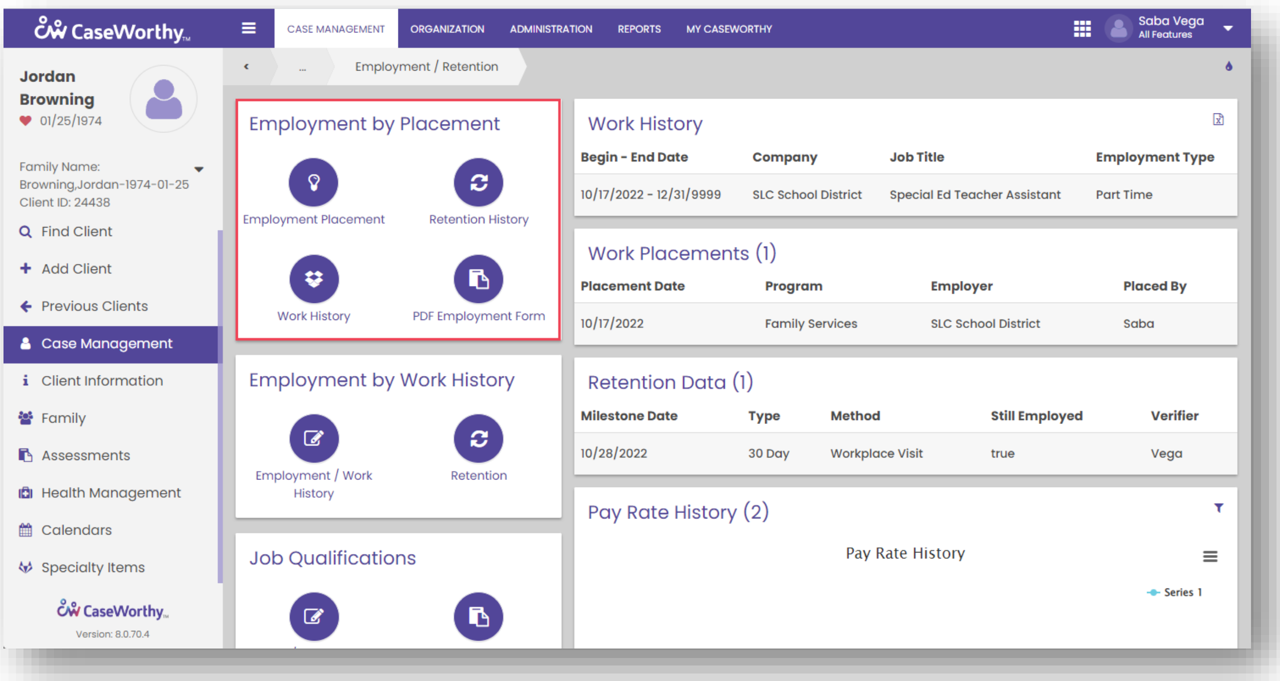
Contents

Job Placements & Retentions

Job Placements are related to enrollments and are used to note the Client's work placements and work history. Retention records are then created in association with placement records to continue to track their success in the placement.

To record a job placement, ensure the intended Client's record is displayed in the Client Entity corner. On the Case Management tab, select Case Management in the Navigation Menu then Employment and Retention.

Employment / Retention Dashboard



Employment Placement is used to enter new Placement records which include Work History records and to which Retention records are associated.

Retention History is used to view and manage Retention records related to all placements. New retention records are not added here.

Work History is used to view and manage Work History records related to all placements. Again, new records are note added here.

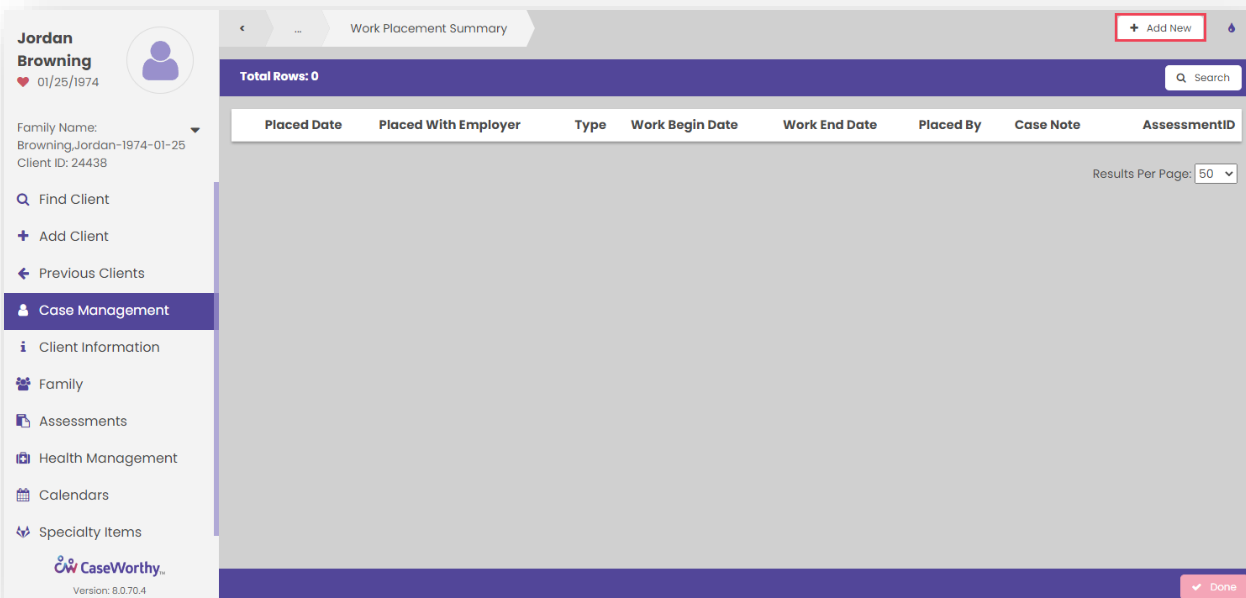
Each of these links also have a corresponding query which display the details of the most recently entered records and links to the same form as the menu link.

The **PDF Employment Form** displays data which can then be easily exported for necessary business purposes

The **Pay Rate History** query will display the Client's pay information as entered.

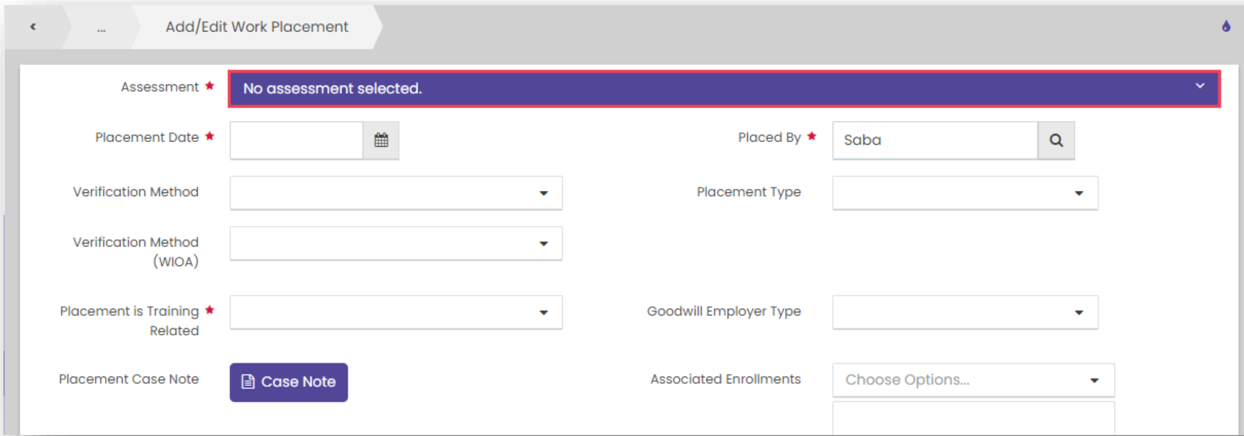
Entering Job Placements

From the *Work Placement Summary* screen, select ADD NEW to enter new placement records

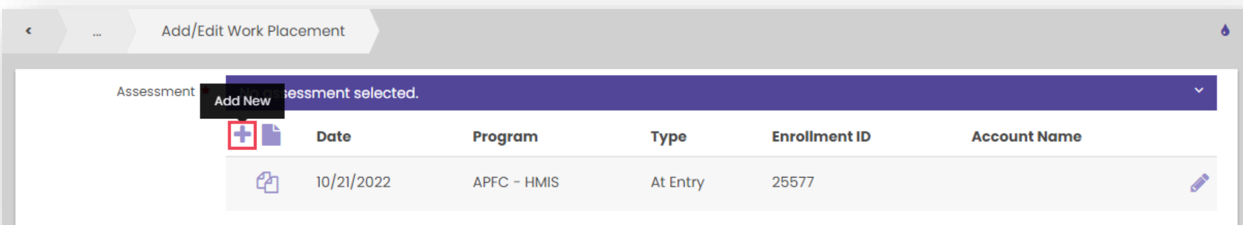


The Job Placement functionality uses an assessment and therefore the Assessment Manager must first be completed.

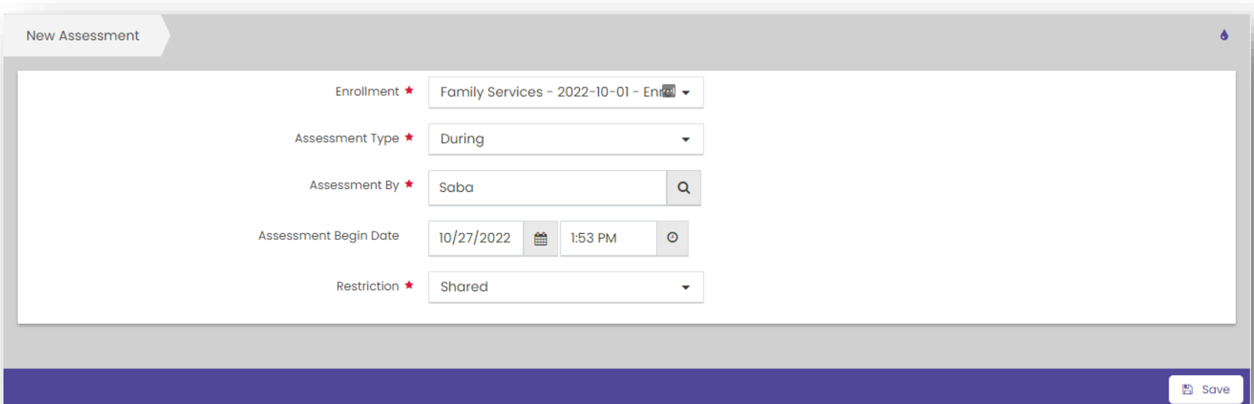
Begin by clicking inside the Assessment Manager.



To create a new Assessment, click the plus symbol.



Select the applicable **Enrollment** which lists all the Client's active enrollments.

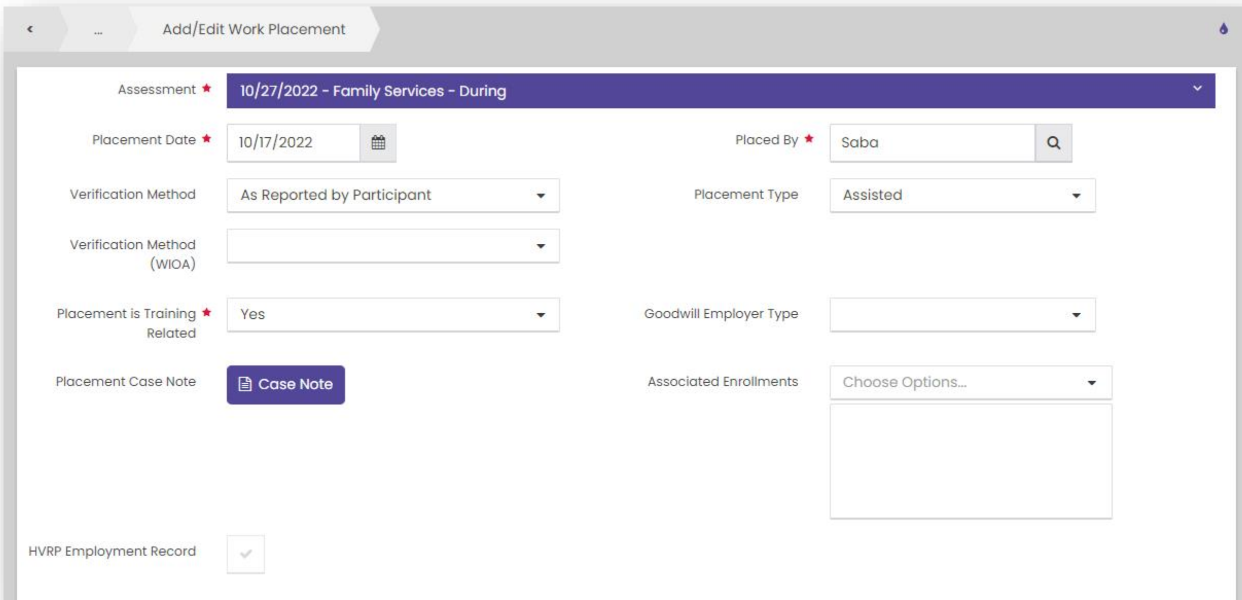


Select the applicable **Assessment Type.**

Assessment By and the **Assessment Begin Date** will default to the current User and current date but can also be changed.

Last, the **Restriction** is set, which pertains to the Organization data sharing relationship.

SAVE when done.



Placement Date is the date the Client was initially placed in employment.

Placed By is who placed the Client in employment and defaults to the current User but can be changed.

Verification Method indicates how the Client's employment was verified.

Select the **Placement Type** as 'Assisted' or 'Unassisted'.

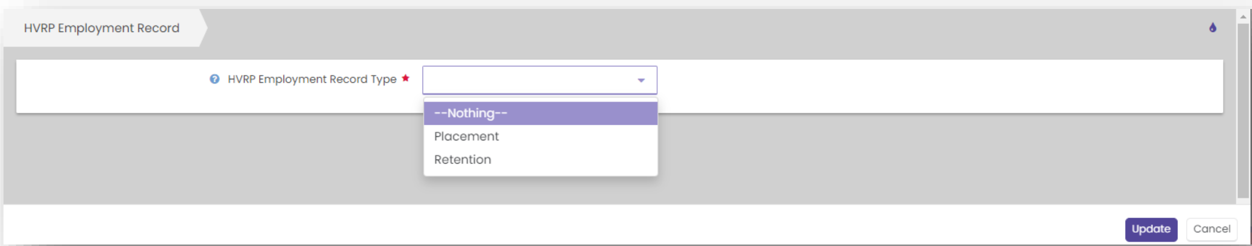
Verification Method (WIOA) is used to identify the method used in verifying the Clients' employment status for Workforce Innovation and Opportunity Act funded programs.

Note if the **Placement is Training Related.** The **Goodwill Employer Type** can also be noted if applicable.

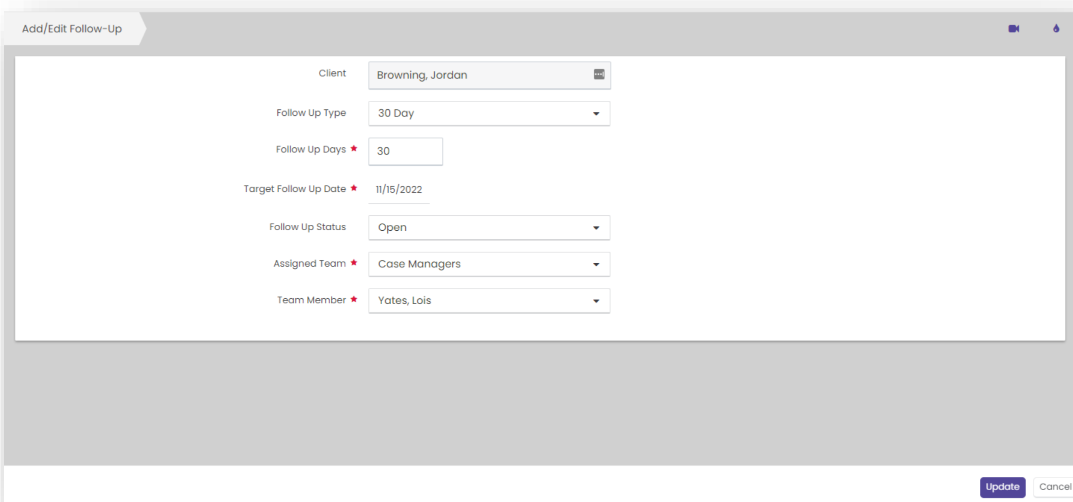
Associated Enrollments displays Client's other enrollments. If this placement is related to more than the enrollment selected in the assessment manager, it can be selected here.

Next, record a **Placement Case Note**. If your program's grant requires verification documentation, the body of this case note may need to include additional details that are not entered elsewhere in the application.

HVRP Employment Record is used to indicate if this employment placement pertains to a Homeless Veterans Reintegration Program enrollment.

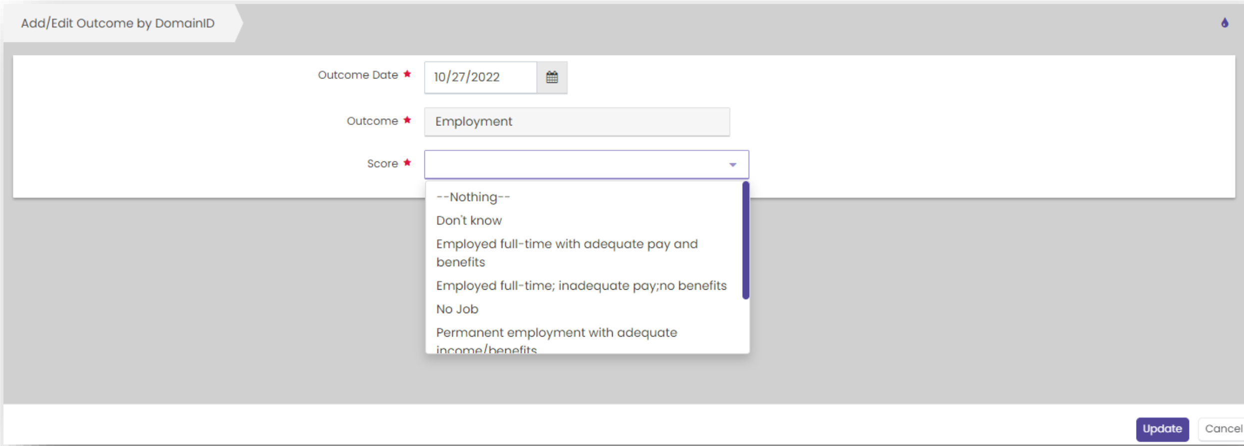


Add Follow-Up can be used to remind yourself or the Case Manager to check on the Client's job placement in a set number of days.



Post Outcome

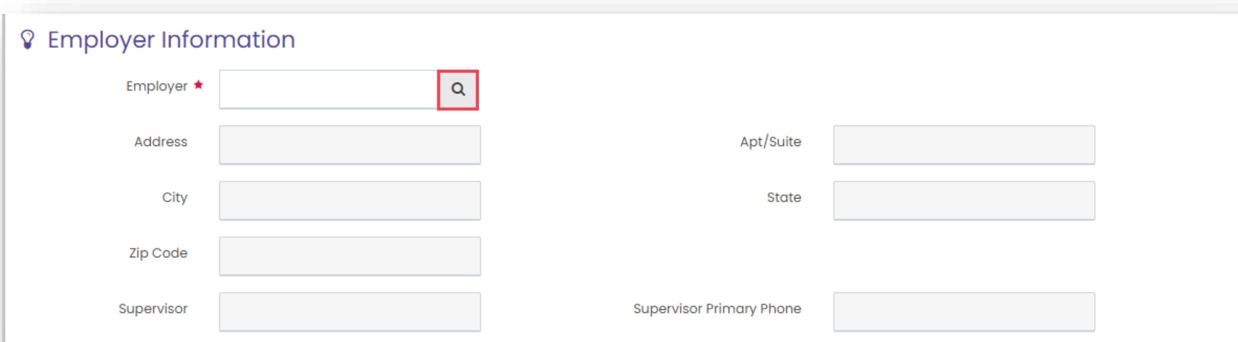
The outcome of the Client's employment can be entered now or later to note the progress of the placement.



Work History Record

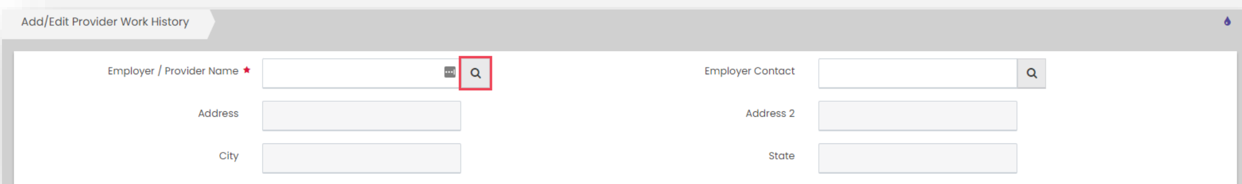
The Work History record is created within the *Employment Placement* assessment. The details of the selected or completed work history will populate the rest of the placement form.

To initiate the creation of the record, or to access an existing record, use the **Employer lookup.**

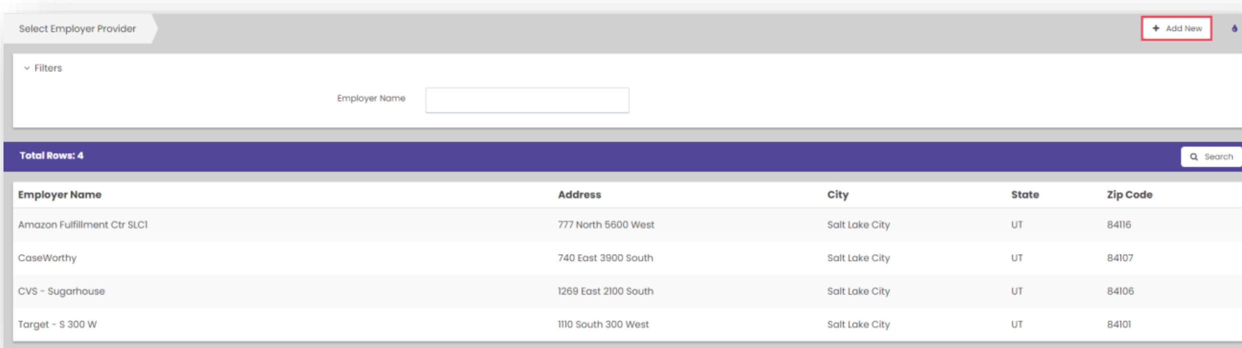


The **Employer** Lookup links to the list of work history placements which have previously been entered for this Client, as well as the ability to add a new work history record. If the Work History record is not listed, click ADD NEW.

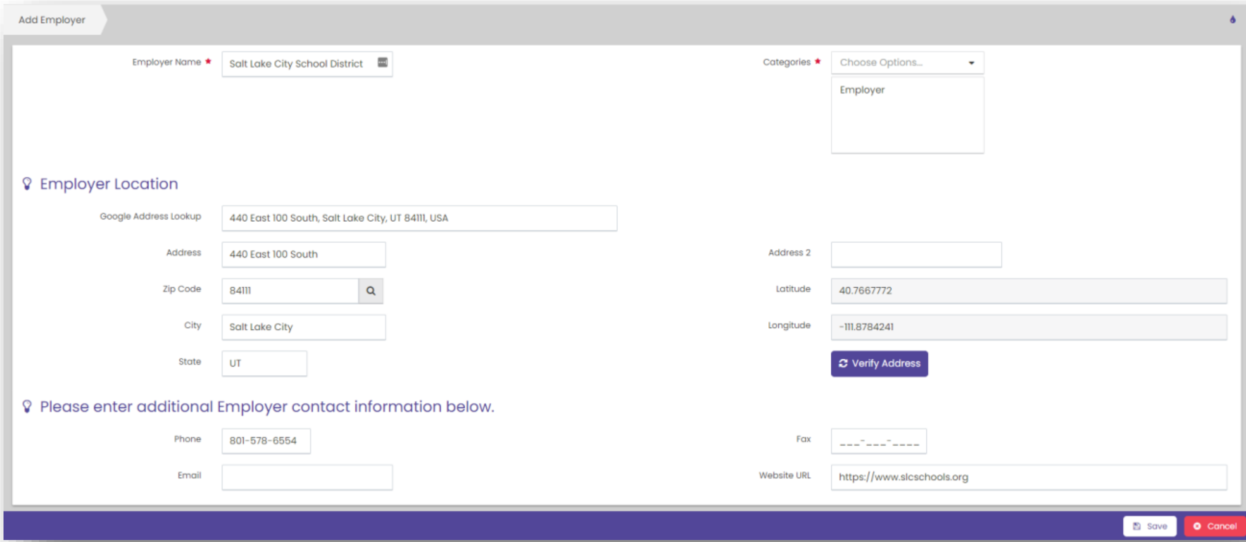
Click the **Employer/Provider Name** look-up icon



This displays all employer Providers whose records were previously created across all Clients.

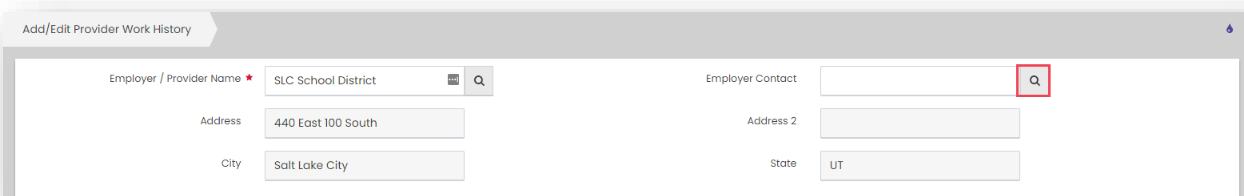


If the employer is not listed, click ADD NEW to enter the Employer's information.

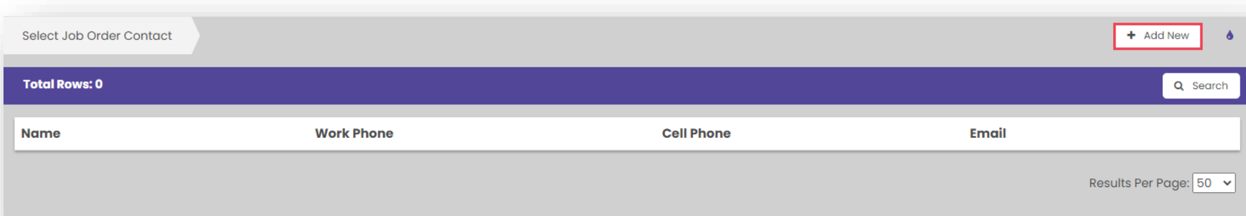


Enter the **Employer Name.** They will be added to the database as a Provider with a category of 'Employer'. Use the **Google Address Lookup** to complete the **Employer Location** section**.** Additional details such as **Phone** and **Email** can be entered as well. SAVE when all details have been entered.

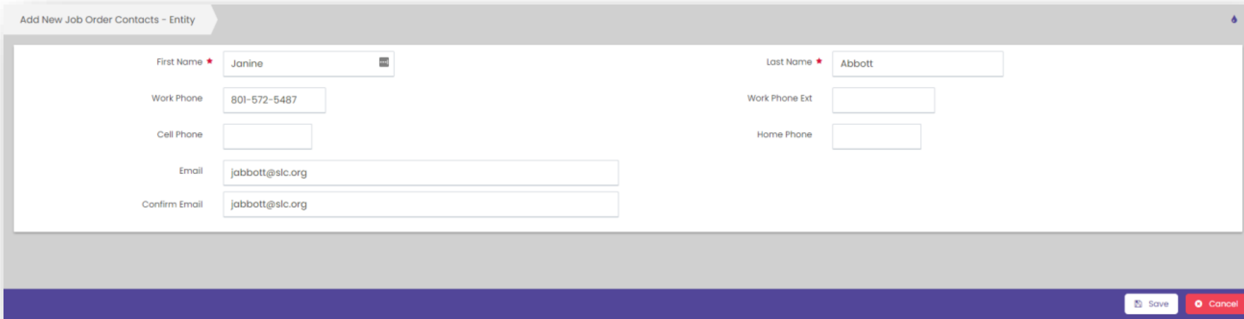
An **Employer Contact** can also be added using the lookup.



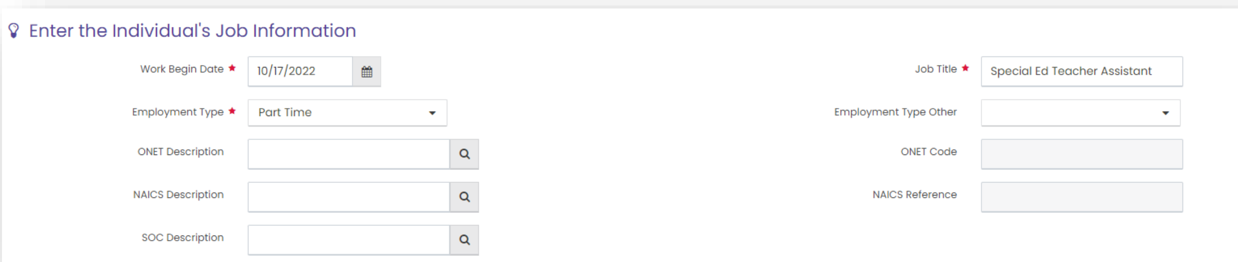
If they are not already listed, use ADD NEW to create a new record.



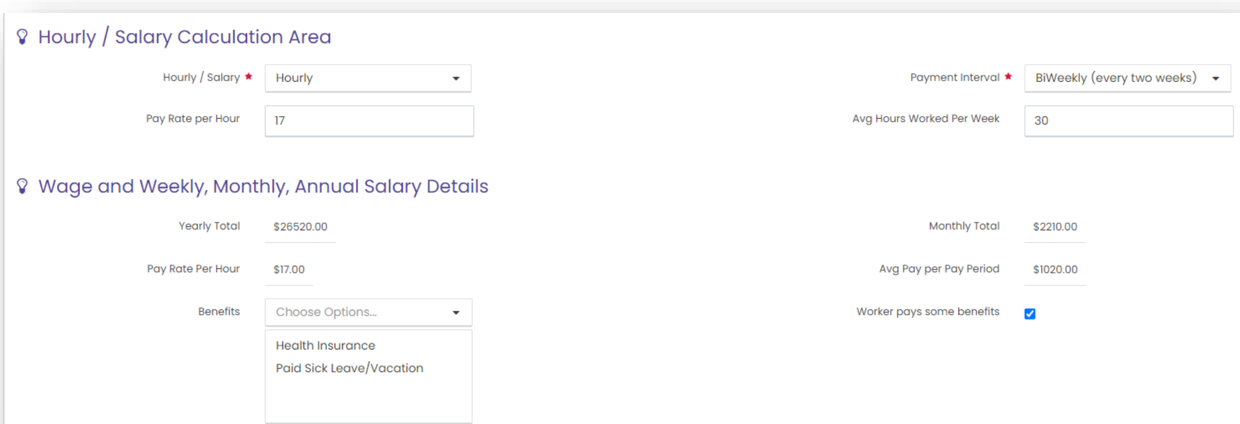
Enter the contact's details and SAVE the record.



Next, enter the details of the Client's job including **Work Begin Date** and **Job Title**.

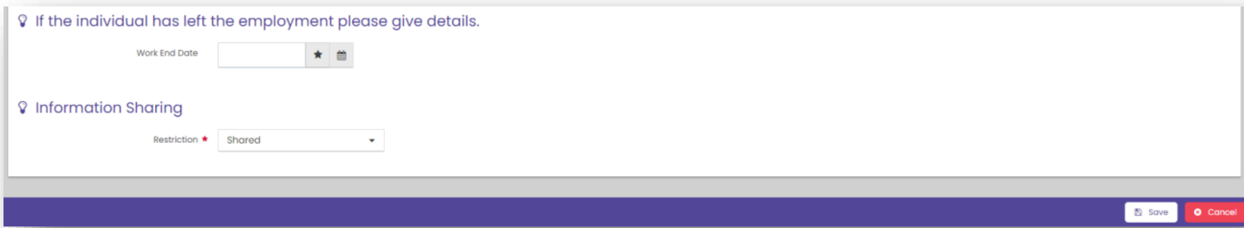


Enter details about how much and how often they are paid. This information is used to automatically calculate and populate the fields below.



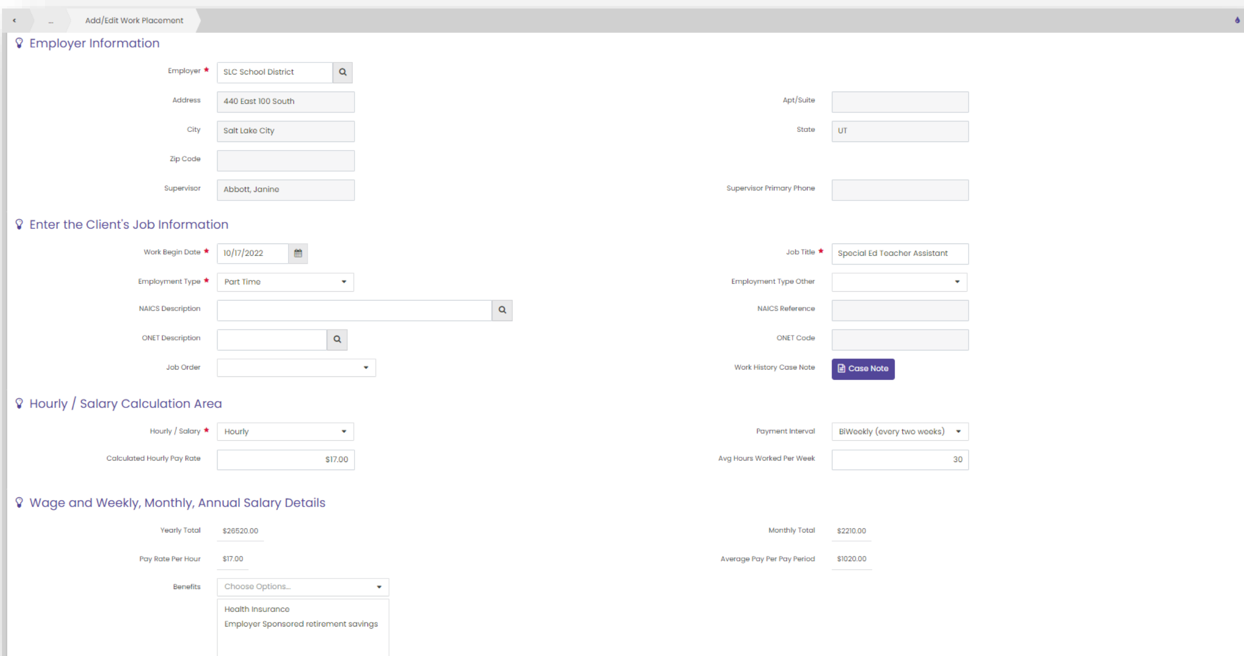
Be sure to select the **Benefits** they will receive as well as if the **Worker Pays some Benefits.**

The last section is used to record an end to this work history record.

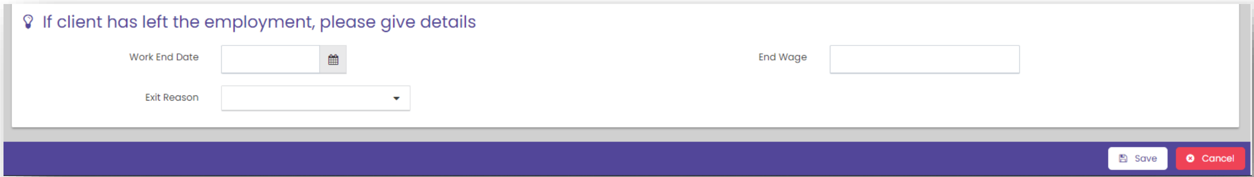


SAVE when information has been entered.

Details entered for the Work History will populate the *Job Placement* form.



The last section is used to later record an end to this placement.



SAVE when done to create the new Job Placement Record.

Job Placement Action Gear

Additional functionality is available from the Job Placement Action Gear.

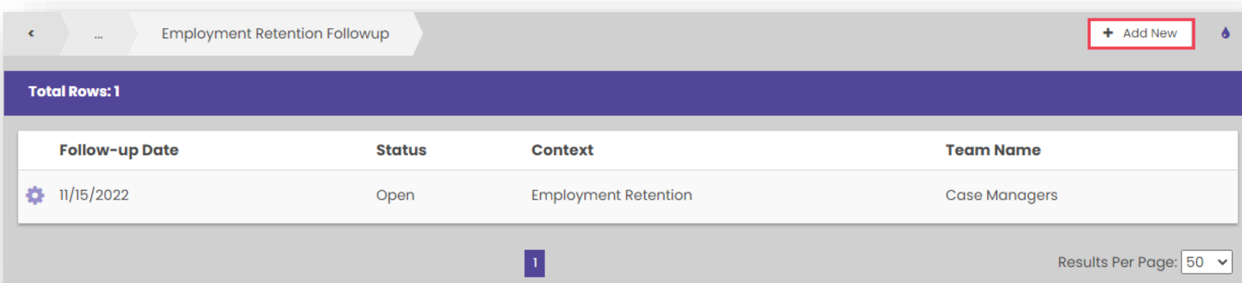
Edit

Edit is used to update the placement's information: perhaps the employer details, employment details, and income. It can also be used to enter Work End Date, End Wage, and the Exit Reason.

Follow ups

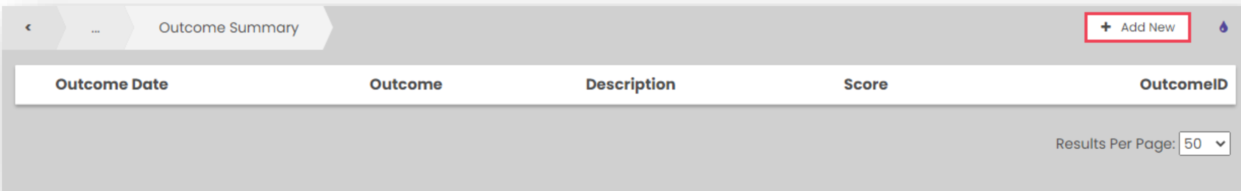
Follow ups offer reminders. Those related to placements and retentions can be managed here. All follow-ups are also able to be managed from the Client Calendar and the My CaseWorthy tab.

New follow-ups can be recorded here using ADD NEW.

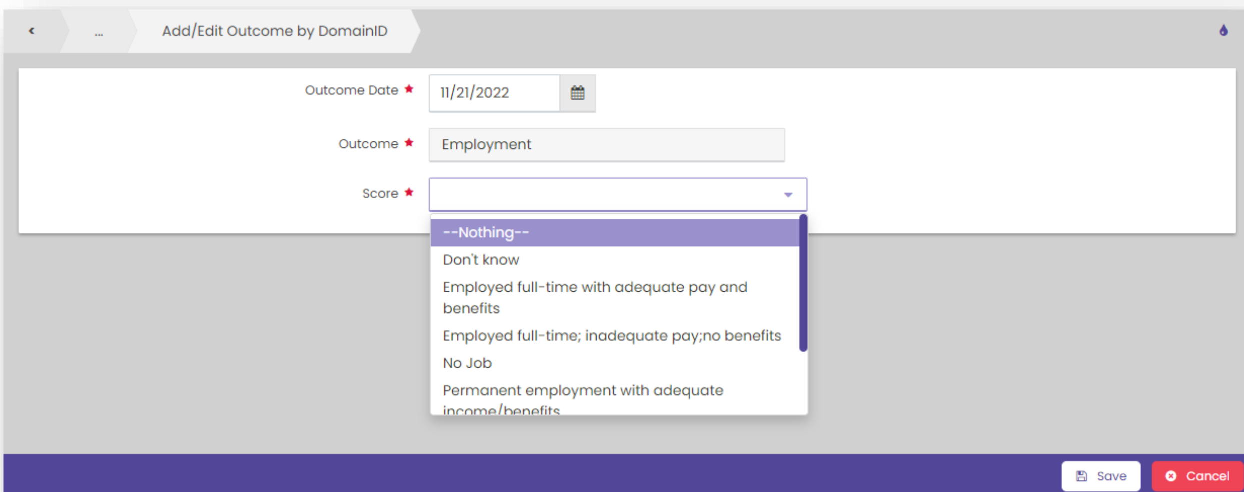


Placement Outcomes

Placement Outcomes are those that are recorded about the Client's Employment. These are different than those we will add for retention records. Click ADD NEW to record a placement outcome.



Select the score and SAVE.



Each outcome can be edited and deleted using the action gear.

Retention

Retention is used to record ongoing records of the Client's success in their placement. This is covered fully in the next section.

Delete Placement and Linked Data

Delete Placement and Linked Data is used to delete both the placement record and all work history records due to erroneous entry.

Delete Placement Not Work History

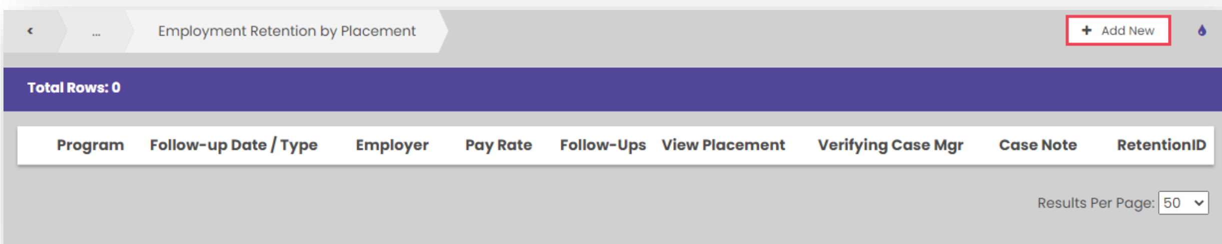
Delete Placement Not Work History, is used to delete the placement record but will leave the Work History record intact so as to be associated with a new placement record in the future.

Retention Records

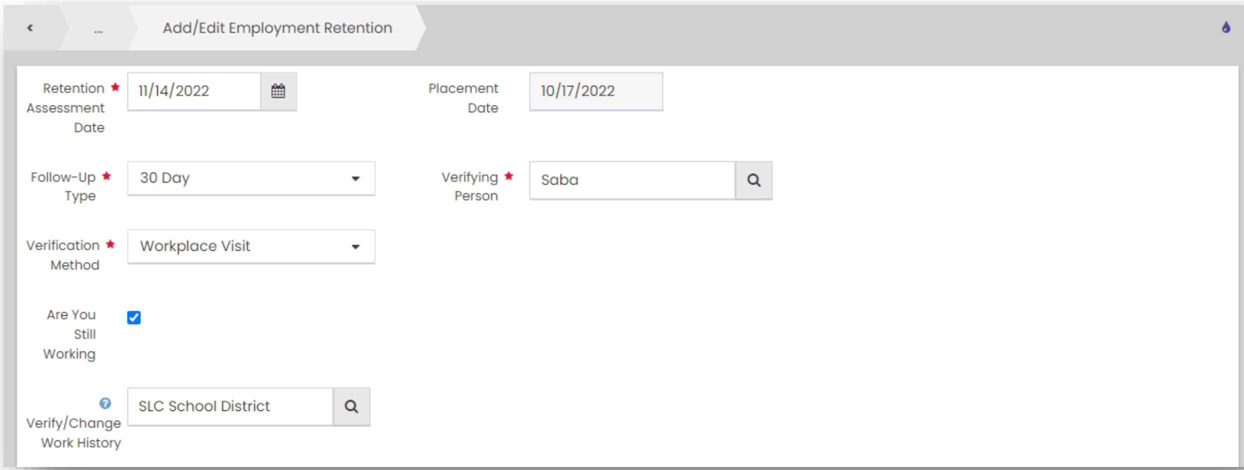
While the Employment placement record captures the details of the Client's job, retention records are used to capture the Client's ongoing progress in the placement.

Retentions are recorded in relationship to the placement and therefore are recorded from the placement's action gear via **Retention**.

The *Employment Retention by Placement* form will display all retention records. To record a new one, click ADD NEW.



Data will automatically populate from the job placement record.



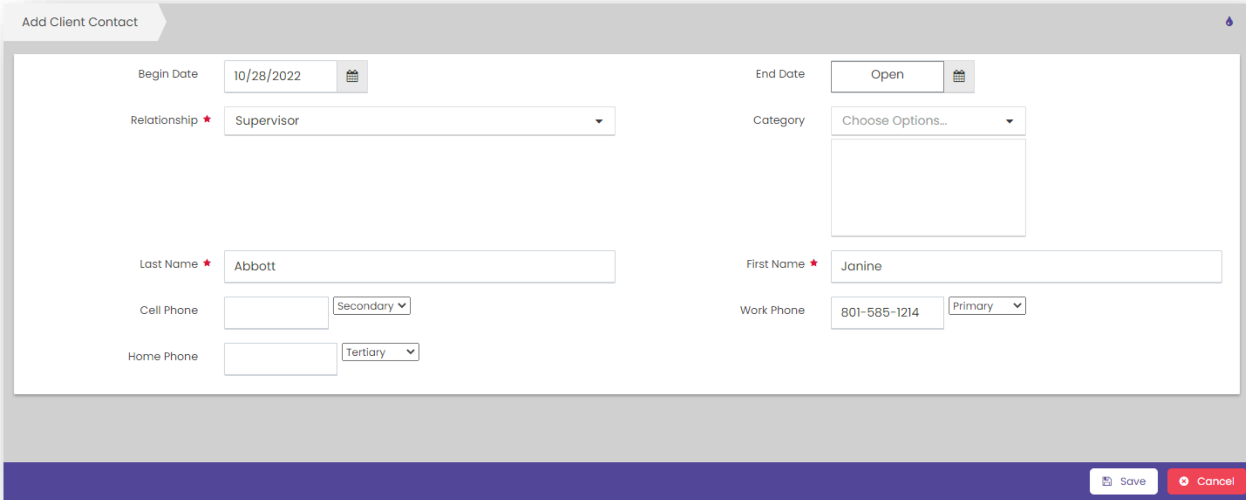
The **Retention Assessment Date** will default to the current date but can be updated. **Follow-Up type** is used to identify when this retention is occurring in relation to the Client's placement. The **Placement Date** appears at the top for reference. **Verification Method** captures how the information for the review is being collected.

Are You Still Working notes if they are still working.

Their Placement and Work History record can be reviewed and changed using the **Verify/Change Work History** lookup.

Details about their supervisor can be entered by clicking the **Supervisor Last Name** lookup, then ADD NEW.

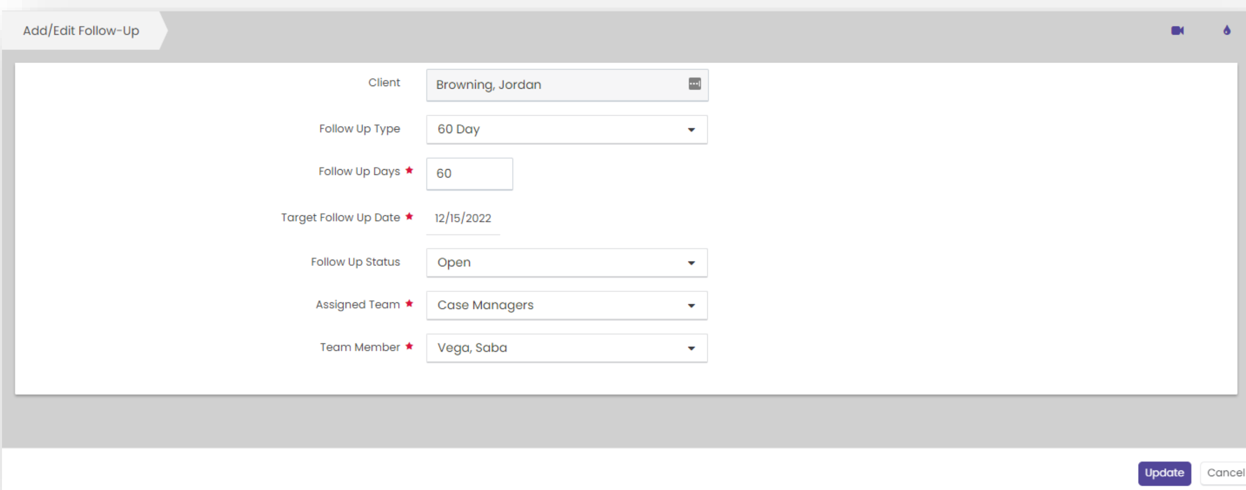
Record the appropriate details and SAVE. This record will appear as a contact for the Client on the *Family and Contacts* dashboard.



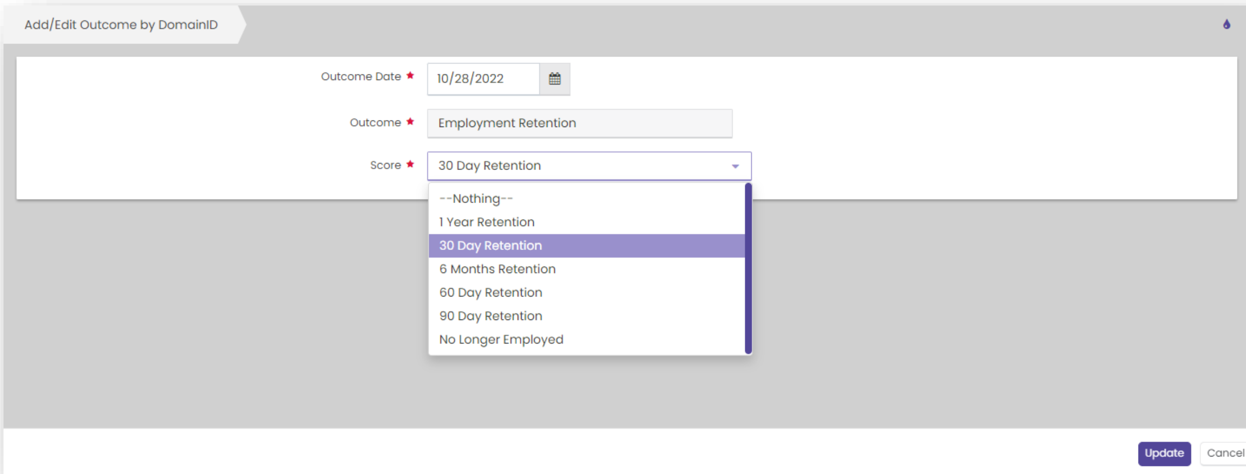
Record the appropriate details and SAVE. This record will appear as a contact for the Client on the *Family and Contacts* dashboard.

Retention **Case Notes** can be recorded. This is an important place to capture details which aren't included elsewhere on the form.

Post Next Follow-Up is used to schedule as reminder for the Case Manager for when the next retention should take place.

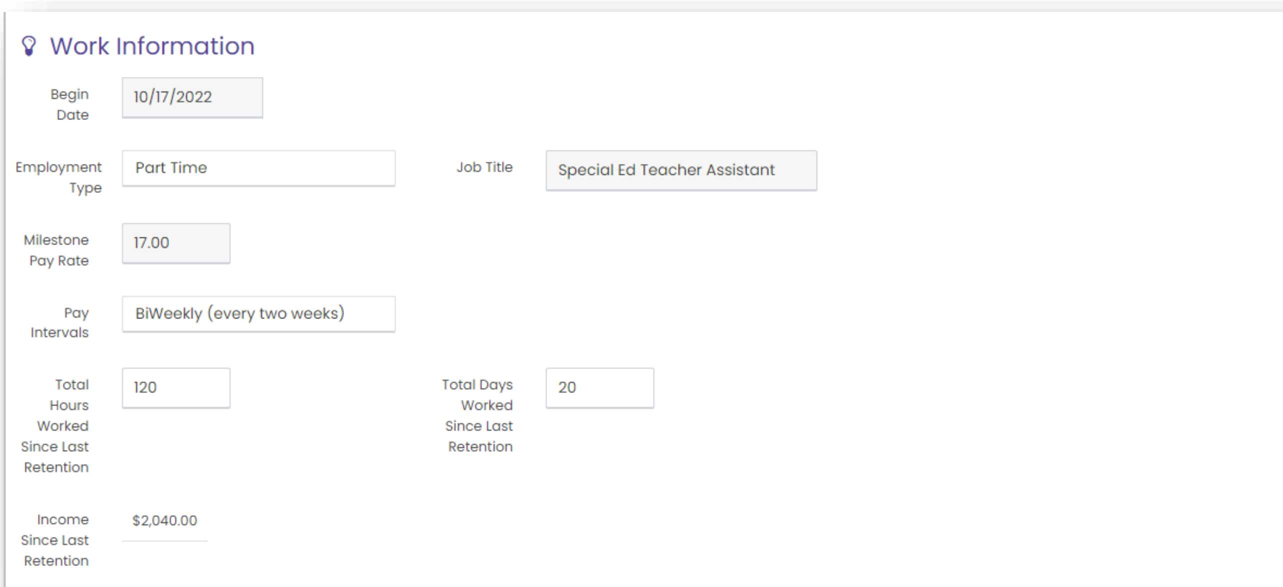


Post Outcome is used to record Employment Retention outcomes which are different than Employment outcomes which are recorded for the placement.



Work Information

The work information section displays details from the placement's work history. Enter the total number of hours and number of days they have worked since their initial placement or last retention.



This information will be used to automatically calculate and display their **Income Since Last Retention.**

HVRP Employment Record is used to indicate if this retention pertains to a Homeless Veterans Reintegration Program enrollment.

Further details about the placement display in the Work Name and Location Information section.

Click SAVE when done.

Retention Record Action Gear

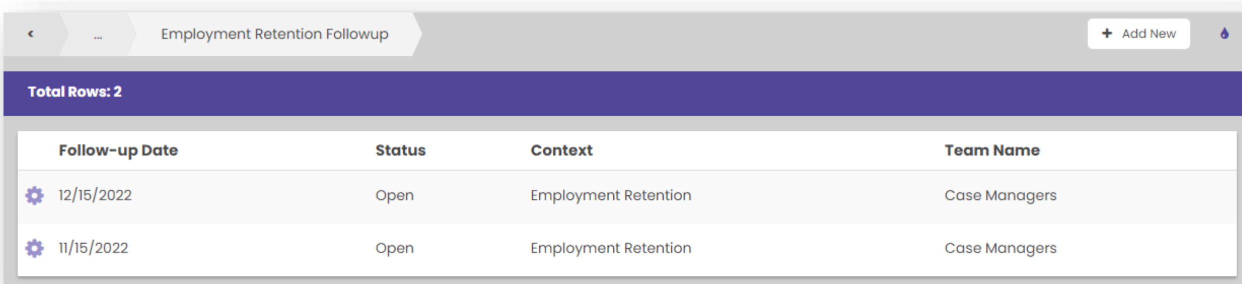
Each retention record includes an action gear where the details of the retention can be managed.

Edit

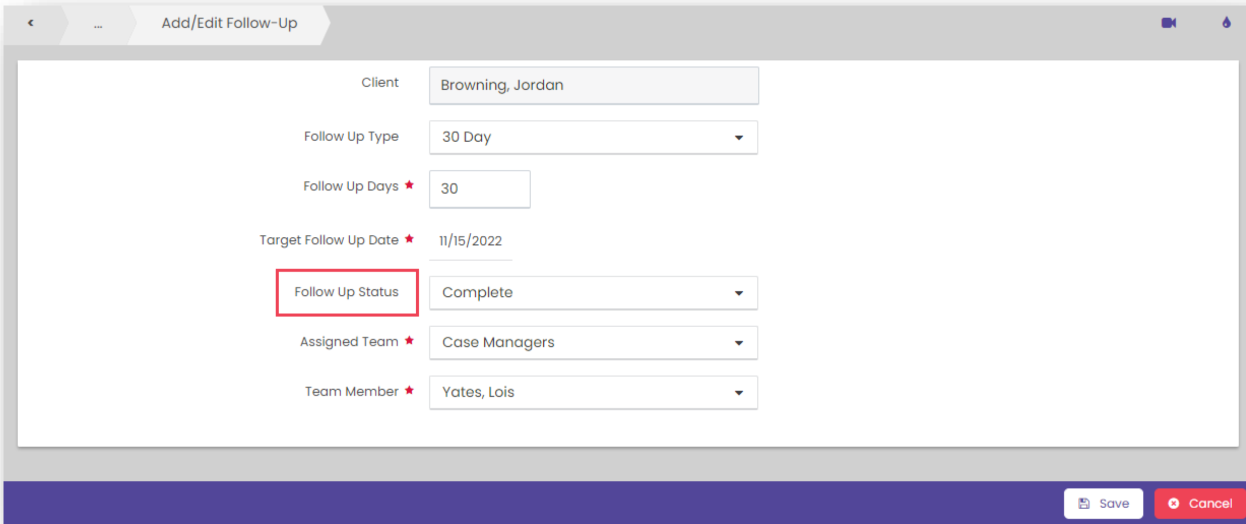
Edit allows for updating of the details of the retention record.

Follow-Up

Follow-ups created from the Job Placement record or the Retention record all appear as the context of Employment Retention and can be managed from both the placement and the retention's action gears.

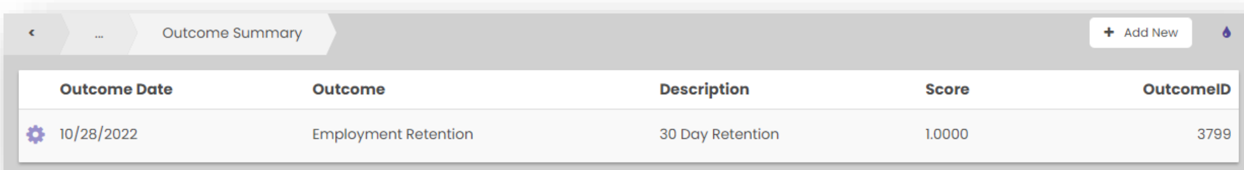


Follow-Ups can be managed from their action gear. The 30-Day check-in has occurred so the follow-up's status should be updated to 'Complete'.



Retention Outcome.

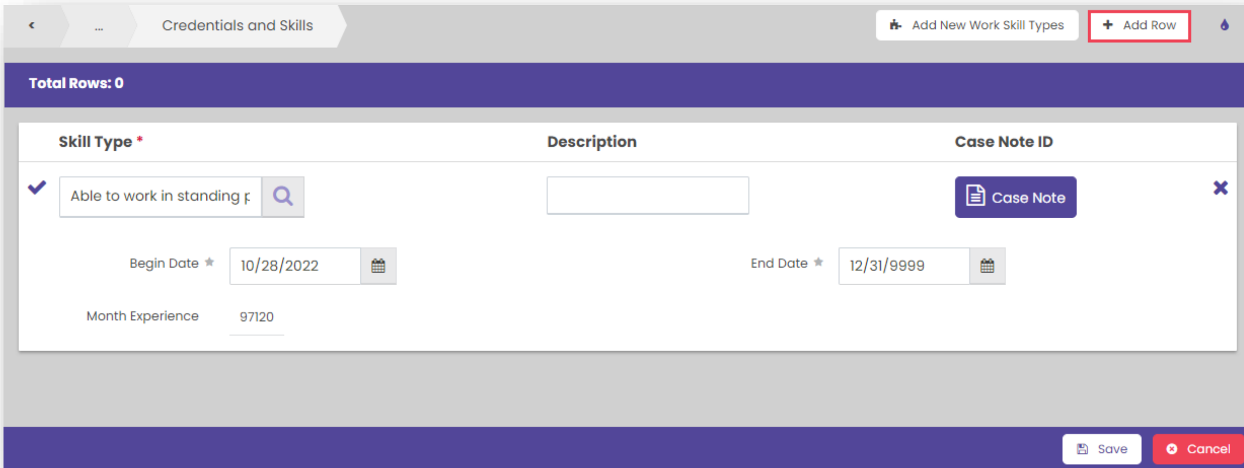
Outcomes recorded from the retention record can be viewed here. If outcomes were not recorded as part of that process they can also be added here.



Work Experience

Work Experience can be used to capture skills for the Client.

Click **ADD ROW.**



Use the **Skill Type** lookup to find and select the skill.

A description can be included to add more details as well as a Case Note. The begin date will default to the current date and the end date will be open. SAVE when done.

Delete

The last item on the Retention action gear is delete, which will remove the record.