

JOB PLACEMENT AND RETENTION FUNCTIONALITY RESOURCE GUIDE

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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

The screenshot shows the CaseWorthy interface for client Jordan Browning. The left sidebar contains navigation options: Case Management, Client Information, Family, Assessments, Health Management, Calendars, and Specialty Items. The main content area is titled 'Employment / Retention' and features four primary action buttons: Employment Placement, Retention History, Work History, and PDF Employment Form. Below these are sections for 'Employment by Work History' and 'Job Qualifications'. On the right, there are three data tables: 'Work History', 'Work Placements (1)', and 'Retention Data (1)', followed by a 'Pay Rate History (2)' section.

Begin - End Date	Company	Job Title	Employment Type
10/17/2022 - 12/31/9999	SLC School District	Special Ed Teacher Assistant	Part Time

Placement Date	Program	Employer	Placed By
10/17/2022	Family Services	SLC School District	Saba

Milestone Date	Type	Method	Still Employed	Verifier
10/28/2022	30 Day	Workplace Visit	true	Vega

Pay Rate History	
Series 1	

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 not added here.

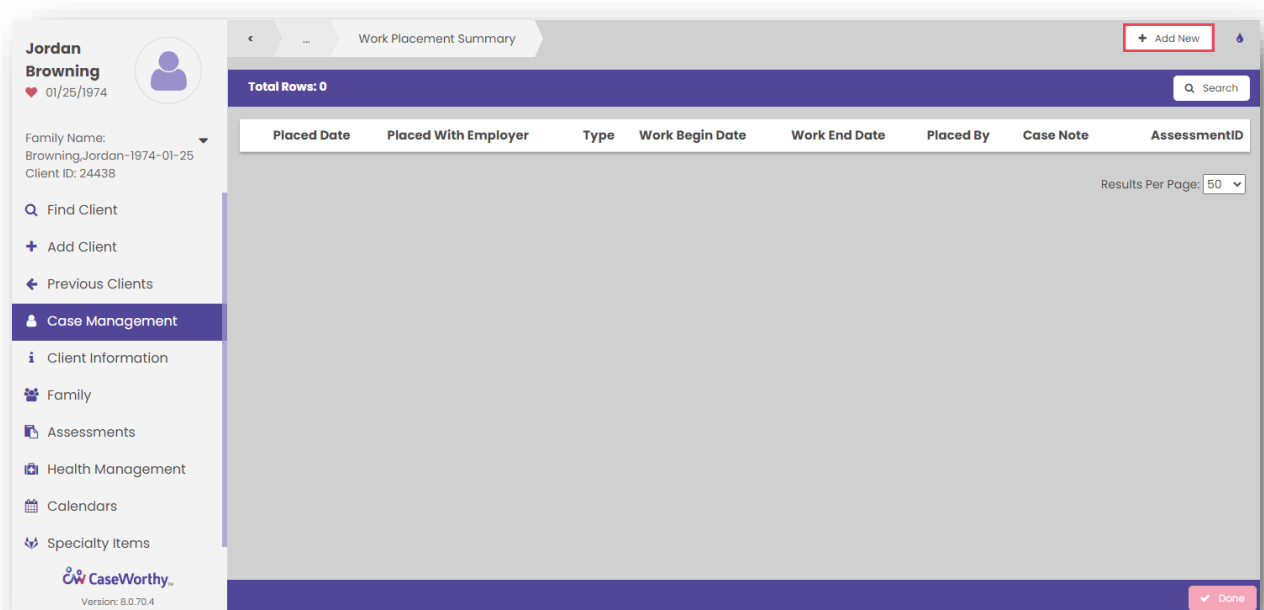
Each of these links also have a corresponding query which display the details of the most recently entered records and links to the same form as the menu link.

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.

	Date	Program	Type	Enrollment ID	Account Name
	10/21/2022	APFC - HMIS	At Entry	25577	

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

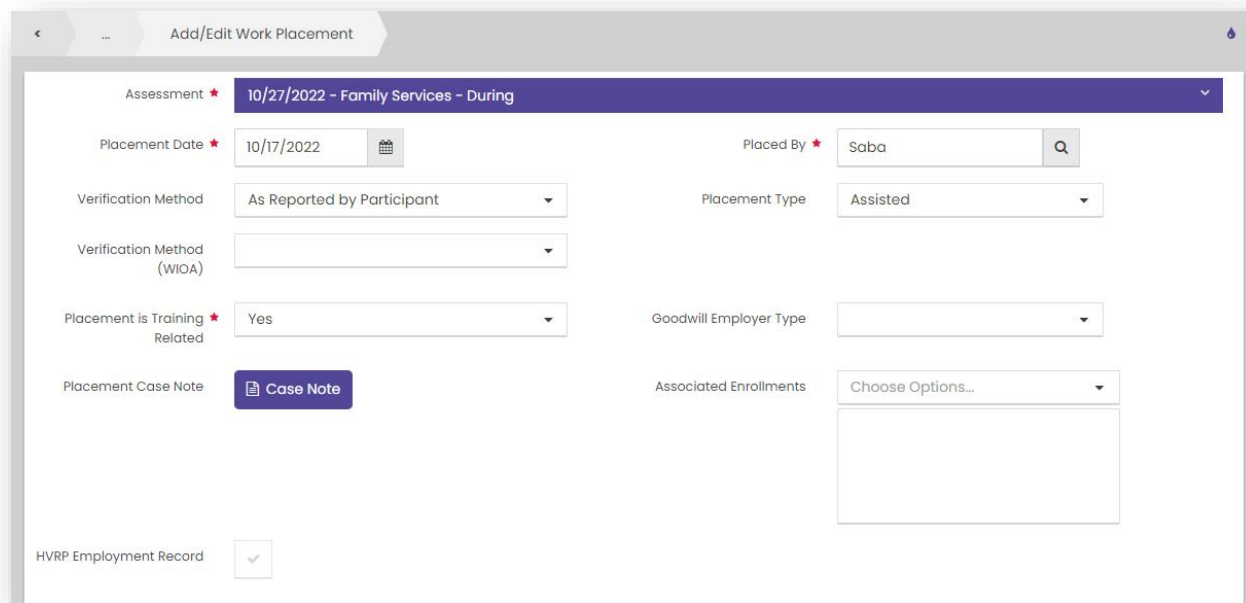
Save

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.

The screenshot shows a web application interface for 'Add/Edit Work Placement'. At the top, there's a breadcrumb trail with a back arrow and an ellipsis, followed by the title 'Add/Edit Work Placement'. Below this is a purple header bar with the text 'Assessment ★ 10/27/2022 - Family Services - During' and a dropdown arrow. The main form area is white and contains several fields: 'Placement Date ★' with a date input '10/17/2022' and a calendar icon; 'Placed By ★' with a text input 'Saba' and a search icon; 'Verification Method' with a dropdown menu showing 'As Reported by Participant'; 'Verification Method (WIOA)' with an empty dropdown; 'Placement is Training ★ Related' with a dropdown menu showing 'Yes'; 'Goodwill Employer Type' with an empty dropdown; 'Placement Case Note' with a blue button labeled 'Case Note'; and 'Associated Enrollments' with a dropdown menu showing 'Choose Options...' and an empty list box below it. At the bottom left, there's a checkbox labeled 'HVRP Employment Record' which is checked.

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'.

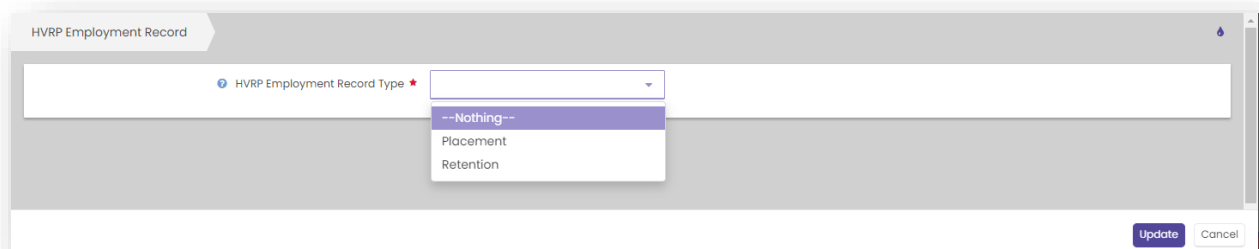
Verification Method (WIOA) is used to identify the method used in verifying the Clients' employment status for Workforce Innovation and Opportunity Act funded programs.

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.

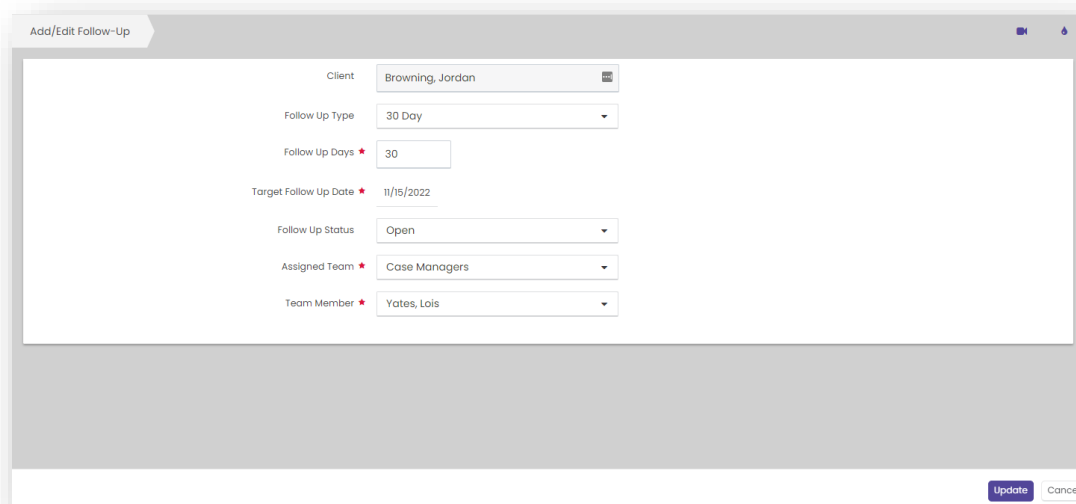
Next, record a **Placement Case Note**. If your program's grant requires verification documentation, the body of this case note may need to include additional details that are not entered elsewhere in the application.

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



The screenshot shows the 'HVRP Employment Record' form. It features a dropdown menu for 'HVRP Employment Record Type' with options: '--Nothing--', 'Placement', and 'Retention'. The 'Update' button is visible at the bottom right.

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.



The screenshot shows the 'Add/Edit Follow-Up' form. It includes fields for: Client (Browning, Jordan), Follow Up Type (30 Day), Follow Up Days (30), Target Follow Up Date (11/15/2022), Follow Up Status (Open), Assigned Team (Case Managers), and Team Member (Yates, Lois). The 'Update' button is visible at the bottom right.

Post Outcome

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

Add/Edit Outcome by DomainID

Outcome Date * 10/27/2022

Outcome * Employment

Score *

- Nothing--
- Don't know
- Employed full-time with adequate pay and benefits
- Employed full-time; inadequate pay;no benefits
- No Job
- Permanent employment with adequate income/benefits

Update Cancel

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**.

💡 Employer Information

Employer * 🔍

Address

City

Zip Code

Supervisor

Apt/Suite

State

Supervisor Primary Phone

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.

Employer Name	Address	City	State	Zip Code
Amazon Fulfillment Ctr SLC1	777 North 5600 West	Salt Lake City	UT	84116
CaseWorthy	740 East 3900 South	Salt Lake City	UT	84107
CVS - Sugarhouse	1269 East 2100 South	Salt Lake City	UT	84106
Target - S 300 W	1110 South 300 West	Salt Lake City	UT	84101

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

Add Employer

Employer Name: Salt Lake City School District

Categories: Choose Options...
Employer

Employer Location

Google Address Lookup: 440 East 100 South, Salt Lake City, UT 84111, USA

Address: 440 East 100 South

Zip Code: 84111

City: Salt Lake City

State: UT

Address 2:

Latitude: 40.7667772

Longitude: -111.8784241

Verify Address

Please enter additional Employer contact information below.

Phone: 801-578-6554

Email:

Fax:

Website URL: https://www.slcschools.org

Save Cancel

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.

Add/Edit Provider Work History

Employer / Provider Name: SLC School District

Address: 440 East 100 South

City: Salt Lake City

State: UT

Employer Contact:

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

Select Job Order Contact

Total Rows: 0

Search

Name	Work Phone	Cell Phone	Email

Results Per Page: 50

Add New

Enter the contact's details and SAVE the record.

Add New Job Order Contacts - Entity

First Name * Janine

Last Name * Abbott

Work Phone 801-572-5487

Work Phone Ext

Cell Phone

Home Phone

Email jabbott@slc.org

Confirm Email jabbott@slc.org

Save Cancel

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

Enter the Individual's Job Information

Work Begin Date * 10/17/2022

Job Title * Special Ed Teacher Assistant

Employment Type * Part Time

Employment Type Other

ONET Description

ONET Code

NAICS Description

NAICS Reference

SOC Description

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

Hourly / Salary Calculation Area

Hourly / Salary * Hourly

Pay Rate per Hour 17

Payment Interval * BiWeekly (every two weeks)

Avg Hours Worked Per Week 30

Wage and Weekly, Monthly, Annual Salary Details

Yearly Total \$26520.00

Monthly Total \$2210.00

Pay Rate Per Hour \$17.00

Avg Pay per Pay Period \$1020.00

Benefits Choose Options...

Health Insurance

Paid Sick Leave/Vacation

Worker pays some benefits ☒

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.

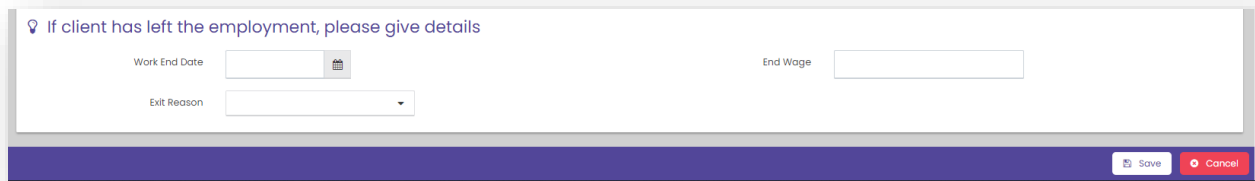
This screenshot shows a form section titled "If the individual has left the employment please give details." It includes a "Work End Date" field with a calendar icon, a star icon, and a trash icon. Below this is an "Information Sharing" section with a "Restriction" dropdown menu set to "Shared". At the bottom right, there are "Save" and "Cancel" buttons.

SAVE when information has been entered.

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

This screenshot shows the "Add/Edit Work Placement" form. It is divided into several sections: "Employer Information" with fields for Employer (SLC School District), Address (440 East 100 South), City (Salt Lake City), Zip Code, Supervisor (Abbott, Janine), Apt/Suite, State (UT), and Supervisor Primary Phone; "Enter the Client's Job Information" with fields for Work Begin Date (10/17/2022), Employment Type (Part Time), NAICS Description, ONET Description, Job Order, Job Title (Special Ed Teacher Assistant), Employment Type Other, NAICS Reference, ONET Code, and a "Close Note" button; "Hourly / Salary Calculation Area" with fields for Hourly / Salary (Hourly), Calculated Hourly Pay Rate (\$17.00), Payment Interval (BiWeekly (every two weeks)), and Avg Hours Worked Per Week (30); and "Wage and Weekly, Monthly, Annual Salary Details" with fields for Yearly Total (\$20520.00), Monthly Total (\$2210.00), Pay Rate Per Hour (\$17.00), Average Pay Per Pay Period (\$1020.00), and a "Benefits" dropdown menu with options: "Choose Options...", "Health Insurance", and "Employer Sponsored retirement savings".

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



A form titled "If client has left the employment, please give details". It contains three input fields: "Work End Date" with a calendar icon, "End Wage", and "Exit Reason" with a dropdown arrow. At the bottom right are "Save" and "Cancel" buttons.

SAVE when done to create the new Job Placement Record.

Job Placement Action Gear

Additional functionality is available from the Job Placement Action Gear.

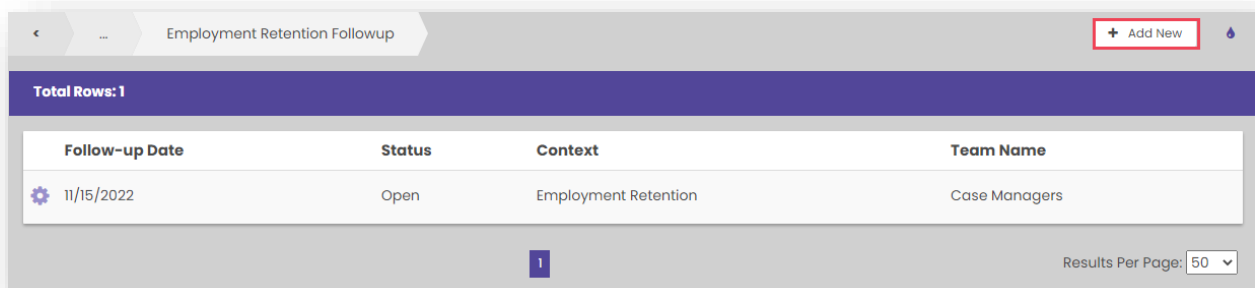
Edit

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.

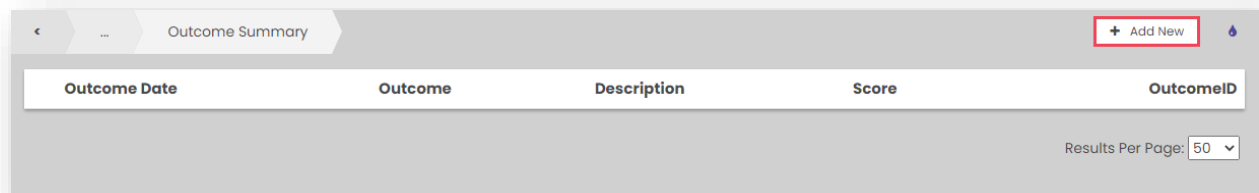


A table titled "Employment Retention Followup" with a "+ Add New" button in the top right. The table has a header row and one data row. Below the table is a pagination bar showing "1" and a "Results Per Page: 50" dropdown.

Follow-up Date	Status	Context	Team Name
11/15/2022	Open	Employment Retention	Case Managers

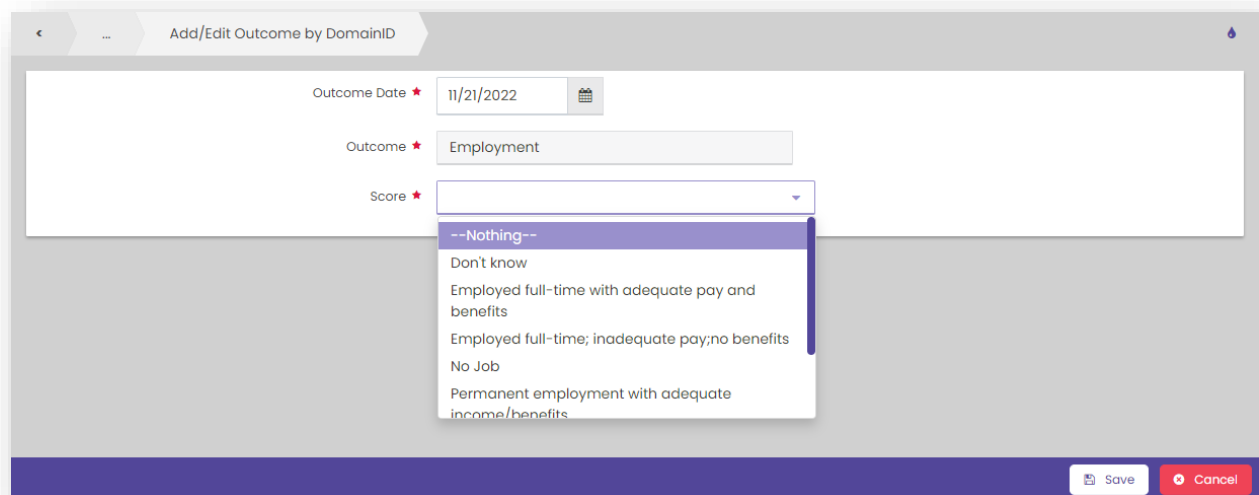
Placement Outcomes

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.



The screenshot shows a web application interface for 'Outcome Summary'. At the top right, there is a red-bordered button labeled '+ Add New'. Below this is a table with the following headers: 'Outcome Date', 'Outcome', 'Description', 'Score', and 'OutcomeID'. At the bottom right of the table area, there is a 'Results Per Page' dropdown menu set to '50'.

Select the score and SAVE.



The screenshot shows a web application interface for 'Add/Edit Outcome by DomainID'. It contains three input fields: 'Outcome Date' with a calendar icon and the value '11/21/2022', 'Outcome' with the value 'Employment', and 'Score' which is a dropdown menu. The dropdown menu is open, showing the following options: '--Nothing--', 'Don't know', 'Employed full-time with adequate pay and benefits', 'Employed full-time; inadequate pay;no benefits', 'No Job', and 'Permanent employment with adequate income/benefits'. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

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

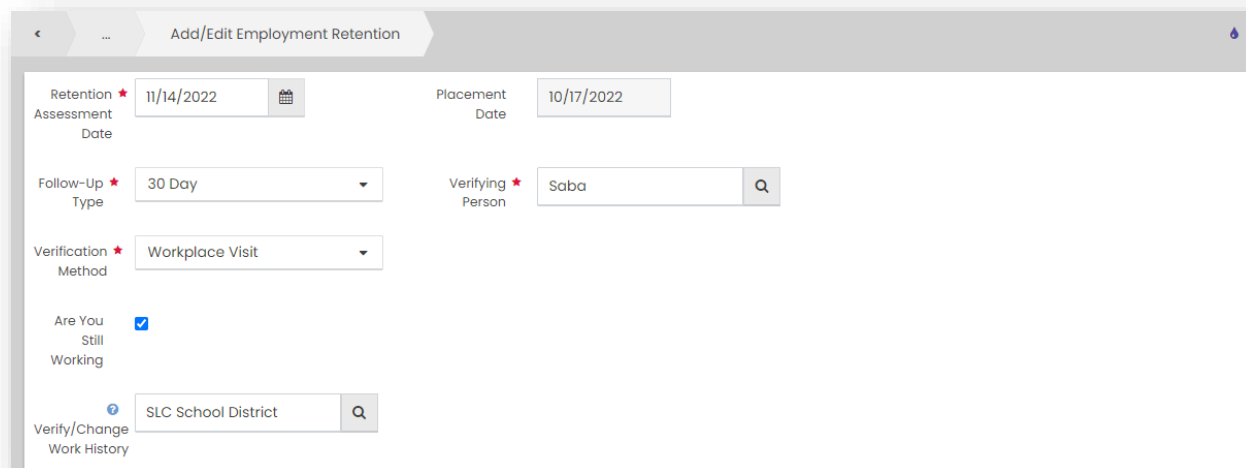
While the Employment placement record captures the details of the Client's job, retention records are used to capture the Client's ongoing progress in the placement.

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.

Program	Follow-up Date / Type	Employer	Pay Rate	Follow-Ups	View Placement	Verifying Case Mgr	Case Note	RetentionID
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Data will automatically populate from the job placement record.



The screenshot shows a web form titled "Add/Edit Employment Retention". The form contains several fields: "Retention Assessment Date" with a date picker set to 11/14/2022; "Placement Date" with a date picker set to 10/17/2022; "Follow-Up Type" with a dropdown menu set to "30 Day"; "Verifying Person" with a text input set to "Saba" and a search icon; "Verification Method" with a dropdown menu set to "Workplace Visit"; "Are You Still Working" with a checked checkbox; and "Verify/Change Work History" with a text input set to "SLC School District" and a search icon. The form is displayed on a light gray background with a subtle shadow.

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.

The 'Add Client Contact' form is a web-based interface for adding a new contact for a client. It features a title bar 'Add Client Contact' with a close button. The form is organized into two columns. The left column contains fields for 'Begin Date' (10/28/2022), 'Relationship' (Supervisor), 'Last Name' (Abbott), 'Cell Phone' (Secondary), and 'Home Phone' (Tertiary). The right column contains fields for 'End Date' (Open), 'Category' (Choose Options...), 'First Name' (Janine), and 'Work Phone' (801-585-1214, Primary). At the bottom right, there are 'Save' and 'Cancel' buttons.

Begin Date	10/28/2022	End Date	Open
Relationship *	Supervisor	Category	Choose Options...
Last Name *	Abbott	First Name *	Janine
Cell Phone	Secondary	Work Phone	801-585-1214 Primary
Home Phone	Tertiary		

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.

The 'Add/Edit Follow-Up' form is a web-based interface for scheduling a follow-up. It features a title bar 'Add/Edit Follow-Up' with a close button. The form contains fields for 'Client' (Browning, Jordan), 'Follow Up Type' (60 Day), 'Follow Up Days' (60), 'Target Follow Up Date' (12/15/2022), 'Follow Up Status' (Open), 'Assigned Team' (Case Managers), and 'Team Member' (Vega, Saba). At the bottom right, there are 'Update' and 'Cancel' buttons.

Client	Browning, Jordan
Follow Up Type	60 Day
Follow Up Days *	60
Target Follow Up Date *	12/15/2022
Follow Up Status	Open
Assigned Team *	Case Managers
Team Member *	Vega, Saba

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

Add/Edit Outcome by DomainID

Outcome Date * 10/28/2022

Outcome * Employment Retention

Score * 30 Day Retention

- Nothing--
- 1 Year Retention
- 30 Day Retention
- 6 Months Retention
- 60 Day Retention
- 90 Day Retention
- No Longer Employed

Update Cancel

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.

Work Information

Begin Date 10/17/2022

Employment Type Part Time Job Title Special Ed Teacher Assistant

Milestone Pay Rate 17.00

Pay Intervals BiWeekly (every two weeks)

Total Hours Worked Since Last Retention 120 Total Days Worked Since Last Retention 20

Income Since Last Retention \$2,040.00

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

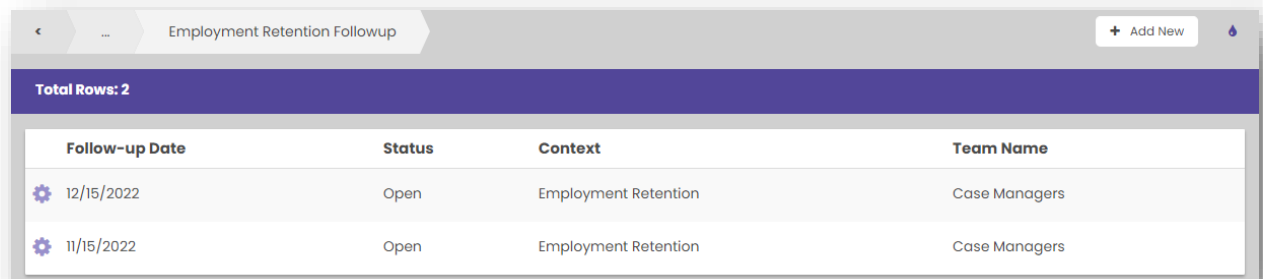
Each retention record includes an action gear where the details of the retention can be managed.



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.



Total Rows: 2			
Follow-up Date	Status	Context	Team Name
 12/15/2022	Open	Employment Retention	Case Managers
 11/15/2022	Open	Employment Retention	Case Managers

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'.

Client: Browning, Jordan

Follow Up Type: 30 Day

Follow Up Days: 30

Target Follow Up Date: 11/15/2022

Follow Up Status: Complete

Assigned Team: Case Managers

Team Member: Yates, Lois

Save Cancel

Retention Outcome.

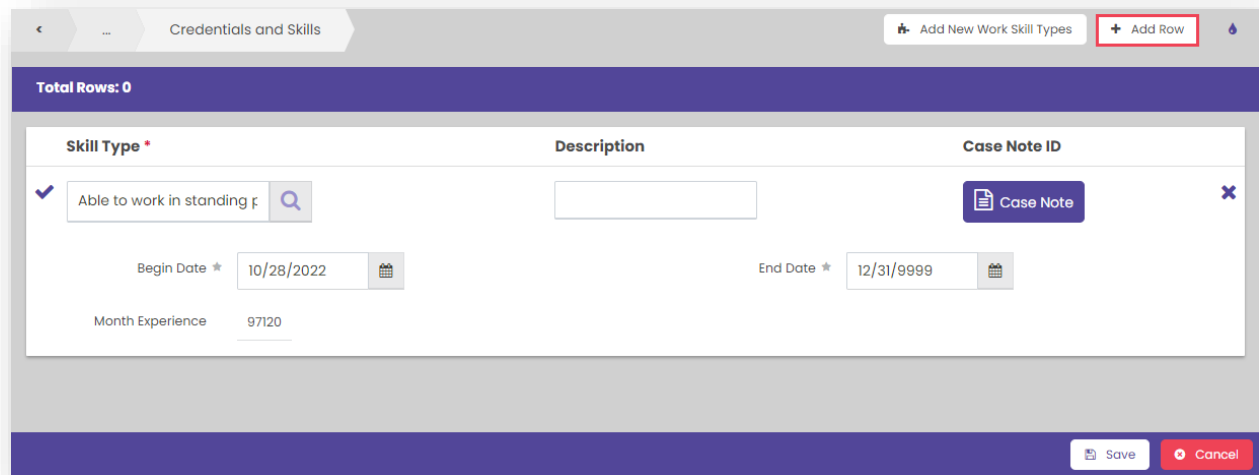
Outcomes recorded from the retention record can be viewed here. If outcomes were not recorded as part of that process they can also be added here.

Outcome Date	Outcome	Description	Score	OutcomeID
10/28/2022	Employment Retention	30 Day Retention	1.0000	3799

Work Experience

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

Click **ADD ROW**.



The screenshot shows a web application interface for 'Credentials and Skills'. At the top, there's a navigation bar with a back arrow, a menu icon, and the title 'Credentials and Skills'. To the right of the title are two buttons: 'Add New Work Skill Types' and 'Add Row', which is highlighted with a red box. Below the navigation bar, a purple header bar displays 'Total Rows: 0'. The main content area is a form with three columns: 'Skill Type *', 'Description', and 'Case Note ID'. The 'Skill Type *' column contains a dropdown menu with a checkmark and the text 'Able to work in standing f', followed by a search icon. The 'Description' column has a text input field. The 'Case Note ID' column features a 'Case Note' button with a document icon and a close button (X). Below these columns, there are two date pickers: 'Begin Date *' with the value '10/28/2022' and 'End Date *' with the value '12/31/9999'. At the bottom left, there is a 'Month Experience' field with the value '97120'. At the bottom right, there are 'Save' and 'Cancel' buttons.

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.