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# **EKOS BASIC AND PERFORMANCE TRAINING**

Test site: [www.ekostest.ky.gov](http://www.ekostest.ky.gov) Username:tester1 Password:july2004

- **Welcome – Housekeeping**
  - Introduction of Trainees
- **EKOS History**
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  - Flowchart for EKOS Interfaces
- **Self Registration**
  - Review Home page options
- **Exercise**
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- **Self Service**
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  - Save Search
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- **Staff Module**
  - Appointments/ Reminders/ Preferences/Security
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- **Explore – HELP module**
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- **Customer Search**
  - Name and Social
  - All search tabs
  - Desired Employer
- **Customer Detail**
  - Mediated data fields
  - Internet Resume flag
  - ONET
  - Common Measures Overview (*Outcomes, Enrollments & Service History*)
- **Activities**
  - How activities effect Common Measures Performance
  - Categories of Activities
  - Definition of Customer Activities
  - Definition of Employer Activities
  - Crystal Activity Report

- **Customer Detail Features**
  - Resume
  - Schedule
  - IVR
  - Correspondence
  - IA Referrals
  - Post a Note
  - Matches
- **Exercise**
  - Customer match
- **Services Module** (*Outcomes, Enrollments & Service History*)
- **Comp Assessment** (*Overview*)
- **Lists**
  - Customer/Employer/Job Order & Desired Employer
- **Employer Search**
  - All search tabs
- **Employer Detail**
  - Mediated data fields
  - Desired Employer
  - E3 Employer Records
- **e3 Website**
  - Overview of
    - E3 Queue for Employer Record Approval
    - E3 Queue for Job Order Approval
- **Job Order Search**
  - All search tabs
- **Job Order Detail**
  - Mediated data fields
  - E3 Job Order
  - IVR
  - Job Order/ Employer Correspond
  - Match
  - Referral
- **Exercise**
  - Job Order match
- **EEO Reports**

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All current and previous issues of the EKOS newsletter along with a list of the customer and employer definitions can be found at:  
<http://my.edcabinet.ky.gov/ekosinfo.htm>

IT HELP DESK (502) 564-9216 or 866-520-0002

# EKOS

## GENERAL INFORMATION

- **Employ Kentucky (EKOS) Is a common system shared by multiple agencies**
  - Any Partner that has the proper security clearance can now enter customer information in to the system.
  
- **Hints / Helps / Info**
  - DO NOT USE the BACK/FORWARD Buttons or the REFRESH BUTTON on your windows bar located at the top of the page or you will loose all information entered, and be kicked out of Employ Kentucky.
  - **Employ Kentucky (EKOS)** has an automatic timeout feature, after 30-40 minutes of inactivity, you will be required to log back onto the system.
  - All information entered into the system should be entered using the proper Upper or Lower Case letters.
  - Always, go to Search before pulling up a “**Customer, Employer, Provider or Job Order**”
  - 4 Tabs that must be completed to create a record are General, Add'l Info, Objective, Skills
  - Any gray tab or button – Means you do not have access to alter.
  - ● (green dot) – means required field. Failure to complete any required field will result in an error message.
  - You will need to use a “**Double click**” instead of a “**single**”
  - State Field defaults to **KY** Country defaults to **USA**
  
- **Several Keys have Multiple Functions**
  - **F11-** Allows you to switch between a normal screen and a full screen
  - **SHIFT-** Selects more than one customer record at a time – Hold down shift, Click on the first customer name while holding down (the shift button) click on the last customer name you want to highlight.
  - **ALT-** To select more than one randomly – Hold down ALT click got to the next record and click.
  
- **Things to remember:**
  - Update Password (we suggest you should change your password every quarter)
  - Check daily- Appointments/ Calendar / Reminders
  - View future appointments/calendar
  - “Help Module” a comprehensive indexed help manual of each module
  - “Correspondence Help” can access templates used in correspondence and can be downloaded to your PC

## Website Resources

### Test sites

EKOS test (username: tester1) (password: july2004)

<https://www.ekostest.ky.gov>

e3 Test

<https://e3test.ky.gov>

Self-Registration test

<https://selfregtest.ky.gov>

Self Service test

<http://www.ekostest.ky.gov>

### Production Sites

EKOS Production

<https://www.ekos.ky.gov>

e3 Production

<https://e3.ky.gov>

Self-Registration Production

<https://selfreg.ky.gov>

Self Service Production

<http://www.ekos.ky.gov>

### Miscellaneous Sites

America's Job Exchange

<http://www.americasjobexchange.com/>

Job Central

<http://www.JobCentral.com>

Labor Market Information

[www.workforcekentucky.ky.gov](http://www.workforcekentucky.ky.gov)

DOL Common Measures

<http://www.doleta.gov/performance>

ONET definitions

<http://online.onetcenter.org/>

Zip code

<http://zip4.usps.com/zip4/welcome.jsp>

EKOS Info Site: Business Rules, Training Schedules, Definitions, Customer and Employer Activities. Click link below

## Employ Kentucky Operating System Business Rules

This document contains the guiding principles regarding how agencies will use EKOS in the provision of their services. It is expected that all staff will adhere to these guidelines.

### I. Customers

#### A. Customers

1. All Customers must be registered in EKOS.
2. Customers must be registered in EKOS prior to job referrals and/or services being provided.
3. If the Customers is not registered in EKOS, staff will enter the registration information into the Mediated Production site of EKOS or the Customers, utilizing Self-Registration, will input the required data for a registration into EKOS.
4. Staff must review the registration record for accuracy and completeness and make updates as appropriate.
5. The Customers registration Status must be active if the Customer is receiving activities or services from any agency. If this field is in 'Inactive' status, staff is to manually change the status field to 'Active'.
6. If the Customers is seeking employment, the Job Seeker Status must be Active. If this field is in Inactive Status, staff are to manually change the Job Seeker Status Field to Active.
7. "Failed to Report" and "Refused Job" are activities that must be reported in EKOS on a Customers record and must be reported to UI staff for Disputed Claims Investigator (DCI) to investigate.
8. When entering a new record for a customer, staff should enter a pseudo number when the customer social security number is not available. If this is used then staff must place a check mark in the "N/A" field that the customer record will not count in performance. ex: 999-71-1262
  - a) System = 3 9's
  - b) Your 2 digit office number
  - c) Customer's month and year of birth or last four digits of their social security number

## II. Employer

### B. Employer

1. The Federal Employer Identification Numbers (FEIN) is used to identify and validate employers. The FEIN is a unique nine-digit number assigned by the Internal Revenue Service (IRS) to business entities operating in the United States for the purposes of identification. This field is mandatory for all EKOS employer records
  - a) To create a new employer record, first conduct a search by FEIN and then by employer name to determine whether the employer record is already in EKOS. There should be only one active record per FEIN.
  - b) If there are duplicate employer records, and one of the records is an e3 record, the e3 record will always be your active record. If there is not an e3 record, inactivate the other record(s) with no job orders or activities. If the other record(s) have open job orders attached, inactivate the one(s) with the oldest job order. The system will allow staff to inactive an employer record with an open order. Staff will also need to manually add the employer contacts from the 'inactive' record(s) to the 'active' record if they do not already exist. Place a post a note on the employer record's comment section stating why it is being inactivated.
  - c) When reviewing duplicate records never inactive the e3 record, this will result in locking out the e3 employer from their account.
2. Activities to an employer must be documented in the Employer Module using the 'Activity' button. If the specific activity is not available as a selection, staff should document information in comments with 'Post A Note'. Or contact the EKOS Team with a request to have that specific activity added to the activities list. This will give all agencies access to the history.
3. Up to 300 employer contacts can be added to an existing employer record. Employers may have multiple locations, each with their own contact.
4. When entering a new record for an independent contractor (as defined by UI auditors), we will use a pseudo FEIN number ex: 99-9701161
  - a) System = 3 9's
  - b) Your 2 digit office number
  - c) Contractor's month and year of birth or last four digits of their social security number
5. FEIN is not required for independent contractors. Always put a 'Post A Note' that the employer stated they are not required to have a FEIN.
6. Prior to contacting an existing employer, review the employer record for recent activities and comments. After contacting the employer update the record as appropriate.
7. When entering an employer activity, add comments as appropriate.

### III. Job orders

#### C. Job Orders

Federal Performance mandates the reporting of job orders and openings received. Therefore it is critical that all the business rules relating to the taking, writing and maintenance of job orders be followed.

As per the United States Public Laws, 107<sup>th</sup> Congress, Second Session document PL 107-288 (HR 4015), November 7, 2002, JOBS FOR VETERANS ACT.

*“An Act to amend title 38, United States Code, to revise and improve employment, training, and placement services furnished to veterans, and for other purposes.”*

*“The term 'priority of service' means, with respect to any qualified job training program, that a covered person shall be given priority over non-veterans for the receipt of employment, training, and placement services provided under that program, notwithstanding any other provision of law.”*

1. Veterans Priority:
  - a) All staff, not just Veteran staff, must maintain Veterans priority and those agencies that enter job orders **must ensure** that Veterans are accommodated.
  - b) At the time a new job order is received and input into EKOS, staff/agency has the responsibility of performing Veterans priority search. If veterans matching the job order criteria are found, staff/agency is to initiate an IVR and/or contact the veteran.
2. Employers have a variety of options to post jobs in EKOS/AJE.
  - a) Input job orders through e3 at e3.ky.gov.
  - b) Input job orders directly into America’s Job Exchange (AJE).
  - c) Contact a One-Stop Career Center or Local Office in-person, phone, fax, mail, and/or email. If an employer outside your service area or out-of-state, contacts you to list a job order, inform the employer that there is a One-Stop Center in his/her area. However, you are to take and input the job order if the employer prefers.
3. Agencies shall designate an assigned staff on each job order when it is written.
4. The assigned staff for a job order shall be contacted if there are questions or changes regarding the job order.
5. If it is discovered that the employer already has the same job listing(s), staff should inform the employer that a job order is currently open in the system and not duplicate the job order.
6. When entering a job order, staff should always complete the Referral Info tab. This is where staff will get the referral information to give to job seekers. The Hiring Contact on this tab may be different than the person listed on the Contact Info tab making it all the more important to complete the Referral Info tab. Any specific referral instructions are to be entered on this tab in the designated field. There is also other vital information about the job that is housed on this tab making screening applicants more efficient and referrals more appropriate.

7. A referral can only be made on an 'open' job order.
8. The referral method and hiring contact information are located on the Referral Info tab in the Job Order. This is where staff should get all referral information when referring job seekers on that order. There is a field on this tab that contains specific referral instructions for the job seeker along with the hiring contact and method.
9. Once you confirm that the customer meets the job order requirements and that they have a work history completed that reflects the years experience require by the employer, referrals may be made in person, by IVR, or telephone.
10. If an employer requests that an agency screen applicants based on factors that violate state or federal law, the employer must be told we will be unable to service that order. Applications containing questions that violate state or federal ADA and EEO laws will not be distributed by staff.

#### **D. Job Order Maintenance**

1. Assigned staff will ensure a match is performed on a new job order and continue on a weekly basis until the job order is filled or closed.
2. Staff that refers a job seeker to an employer that has a position listed in EKOS is required to enter a referral for that Customer into EKOS.
3. Staff must conduct a follow up with the employer to obtain placement results.
4. Follow up may be completed by phone, fax, email, or mail.
5. All job orders in 'referred' status must have follow-up the day after they are moved to 'referred' status.
6. All results must be posted on the job order 'Comments' Tab of EKOS.
7. Only assigned staff can make changes or updates to job orders.
8. These specific changes/updates should only be changed by designated staff:
  - a) Referral
  - b) Number of openings
  - c) Status change and
  - d) Contact method
9. If changes are necessary please notify the assigned staff
10. Always 'Post A Note' when demographic changes are made.
11. After the end of a quarter, when a job order is 'Closed' or 'Filled', they are not to be reopened if the employer makes the position available again, instead a new job order must be written for the position(s).
12. Archived job orders can only be used for duplicating a job order.

13. The number of Job Openings should not be lowered to make the openings match the placements. Federal Performance (9002E) is based on the 'Number of Openings Received'.
  14. Staffs are not to re-open a Job order that is in 'Referred', 'Closed', 'Suspend' or 'Filled' status to make a referral. Staff must first read Comments to see if any information regarding the status has been documented and/or contact the office or assigned staff who input the Job order.
  15. The 'Emp Req #' field on the job order 'Detail/General Info' Tab is to be used to record a position number that may be assigned by an employer.
  16. The 'Employer Job Title' field on the job order 'Detail/General Info' Tab is used to enter the title that the employer uses for the position they are listing. This title must not be discriminatory or gender specific.
  17. If the Employer and/or Employer Contact have an email and/or Company URL, these should be listed on the job order and the Employer Registration.
  18. Suppress job orders field: Job orders are to be checked "Yes" unless specified otherwise.
  19. The 'Source (State)' field on the job order 'Detail/General Info' Tab has 'Application Only, Full Service' and 'Job Fair' as selections. This field is to be completed as appropriate.
  20. The 'Source (Fed)' field on the job order 'Detail/General Info' Tab has 'Employer Listing', 'Job Development' and 'Mandatory Listing' as selections. This field is to be completed as appropriate.
  21. The job order 'Detail/Job Description' Tab requires an entry of 5 to 4000 characters. 'Word Spell Check' must be used to check the correctness of spelling and grammar.
  22. On the job order 'Detail/Job Detail' Tab, certain fields are not 'green-dotted' but should be completed to ensure better customer service.
    - a) Referrals Requested
    - a) Hours Per Week
    - b) Work Days
    - c) Shift
    - d) Experience Required
    - e) Starting Pay – Minimum, Maximum and Unit
    - f) Drivers License Class
    - g) Endorsements
    - h) Keyboarding Speed
    - i) Public Transportation
- E. FLC, H2A, and H2B job orders**

Field staff should not be making any changes to these job orders (Only Central Office Staff make changes to these orders). Field Staff should perform Matches and make Referrals on these orders as appropriate.

#### **IV. Resumes received in response to Job orders**

Offices shall have staff designated to receive, review and process resumes received in response to a Kentucky Job order listed in EKOS and AJE by contacting the customer in a timely manner to register within our system before a referral can be generated.

#### **V. Staff Security Levels**

- a) Security levels will be based on job duties and training provided by the EKOS team only. When the initial request for EKOS security is received staff will be given the ability to add customer records and customer activities in the system. Once OET staff has attended "EKOS Basic" training they will receive the ability to insert employer records and attach job order referrals, if needed. Once WIA staff has attended "EKOS Basic" training, or trained by their designated Superuser, they will receive the ability to attach services, service offerings, and job order referrals to customer records, if needed. The EKOS security contact for the OET office/WIA Office will need to send an email to the EKOS Project Mailbox ([ekos.project@ky.gov](mailto:ekos.project@ky.gov)) if the additional access is needed after "EKOS Basic" training has been completed. The ability to enter job orders is only granted to any staff once they have completed "Job Order Writing" training, no additional email is required for this.
- a) Security for new employees must be requested by office management on the EKOS Request form and submitted electronically to the EKOS Project Mailbox at [ekos.project@ky.gov](mailto:ekos.project@ky.gov)
- b) Security updates for existing staff can be requested by submitting an email to the EKOS Project Mailbox at [ekos.project@ky.gov](mailto:ekos.project@ky.gov)
- d) Once a designated Superuser has provided training to their staff, in no more than 5 days submit the Security Request form, along with a copy of the Training Certificate developed by the EKOS Support Team should be submitted by your EKOS security contact to the [ekos.project@ky.gov](mailto:ekos.project@ky.gov) mailbox. Also ensure the EKOS Confidentiality Security agreement is completed and mailed.

#### **VI. EKOS Help Desk**

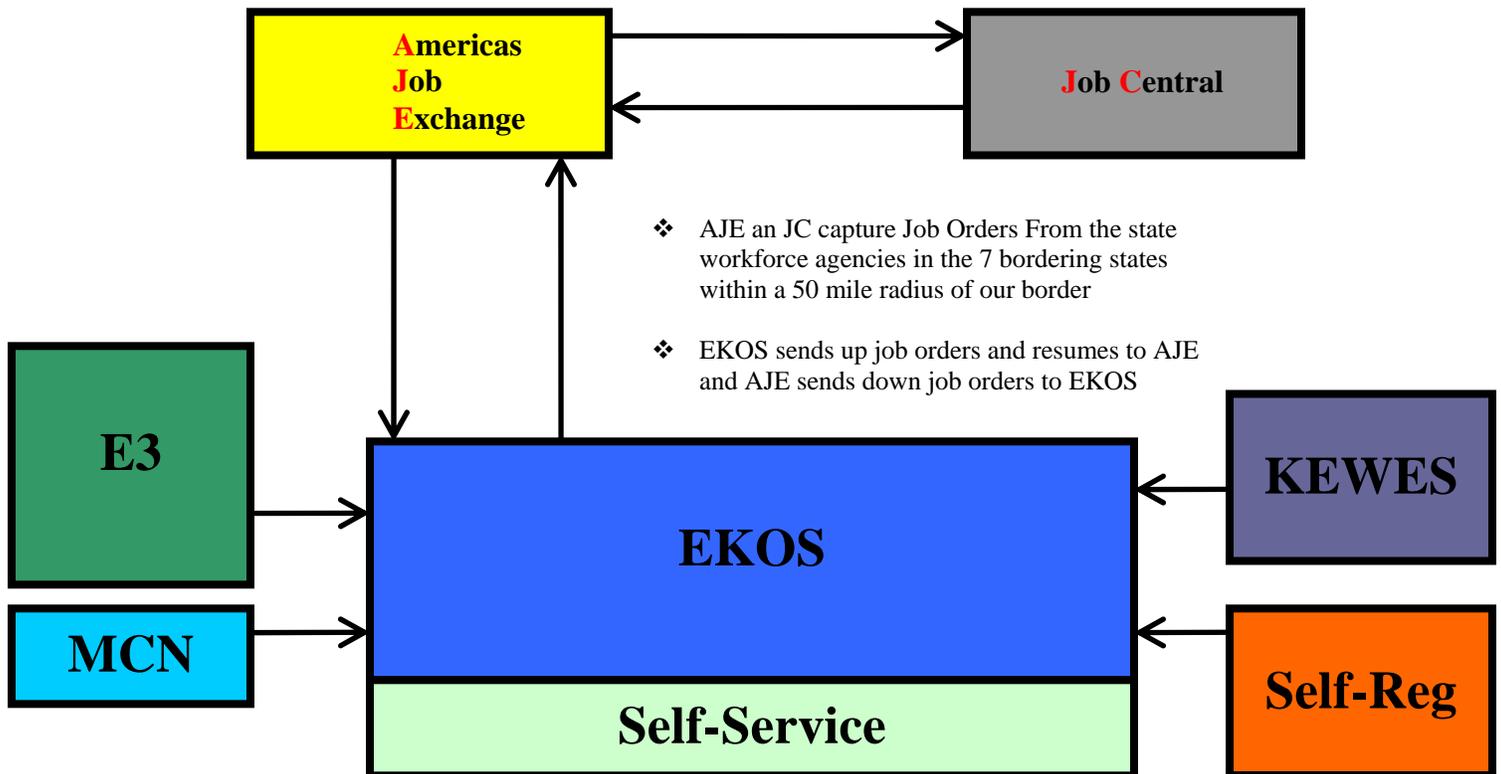
An EKOS Help Desk email box [Ekos.Project@ky.gov](mailto:Ekos.Project@ky.gov) is set to receive problems and/or questions regarding EKOS/e3, AJE and Self Registration and should not be emailed to individuals on the EKOS team. Inquiries/questions not pertaining to EKOS are to be forwarded to DTS Help Desk at 502-564-9216 or (toll free) 866-520-0002.

#### **VII. Super Users (Point of Contact [POC])**

All problems relating to EKOS should be reported by the POC established within each agency to the EKOS Help Desk at [Ekos.Project@ky.gov](mailto:Ekos.Project@ky.gov).

# Data Exchange Chart for EKOS

- ❖ Kentucky has 7 bordering states (2 most in the nation)  
TN, OH, WV, VA, IN, IL, MO & 2 Counties in Arkansas



- ❖ Self-Service – Job Seekers will use this module to perform their job search, save their searches and create job scouts
- ❖ Self-Reg – Job Seekers submit and update their resume using this module
- ❖ Everyone who files an Unemployment Insurance claim through KEWES who are subject to work search also creates a resume in KEWES that is sent to EKOS

## Mediated Business Requirements Staff

### 7.8. Inbox Tab

<input type="checkbox"/>	Start Date	End Date	Start Time	End Time	Name	Event	Description
<input type="checkbox"/>	05/02/2006	05/02/2006	12:00 am	12:00 am	fasdfasdf, awerawerasdf	Missed date	Service should have ended.
<input type="checkbox"/>	05/02/2006	05/02/2006	12:00 am	12:00 am	asdfasf, wqerqwrf	Missed date	Service should have ended.
<input type="checkbox"/>	05/02/2006	05/02/2006	12:00 am	12:00 am	asdfasf, wqerqwrf	Missed date	Service should have ended.
<input type="checkbox"/>	05/02/2006	05/02/2006	12:00 am	12:00 am	asdfasf, wqerqwrf	Missed date	Service should have ended.
<input type="checkbox"/>	07/08/2005	07/08/2005	12:00 am	12:00 am	Abdunnasir, Hafied	Reminder (Lit/Num Testing)	Post Test should be given.
<input type="checkbox"/>	07/08/2005	07/08/2005	12:00 am	12:00 am	Abdunnasir, Hafied	Reminder (Lit/Num Testing)	Post Test should be given.
<input type="checkbox"/>	01/01/2007	01/01/2007	12:00 am	12:00 am	fsdfwer, qwertwer	Missed date	Service should have ended.
<input type="checkbox"/>	12/12/2006	12/12/2006	12:00 am	12:00 am	asdf, sadf	Missed date	Missed achievement objective end date
<input type="checkbox"/>	12/12/2006	12/12/2006	12:00 am	12:00 am	asdf, sadf	Reminder	Achievement objective to end
<input type="checkbox"/>	12/12/2006	12/12/2006	12:00 am	12:00 am	asdf, sadf	Missed date	Missed achievement objective end date
<input type="checkbox"/>	01/01/2007	01/01/2007	12:00 am	12:00 am	fsdfwer, qwertwer	Missed date	Service should have ended.
<input type="checkbox"/>	02/02/2006	02/02/2006	12:00 am	12:00 am	QA_RESERVED, INSERTDAVEtransvet	Reminder	Objective/Services review

7.8.1. The Inbox tab is a list of scheduled events and reminders that will display the following fields for each event:

- 7.8.1.1. *Start Date* – this is the date that the event is scheduled to occur formatted: MM/DD/YYYY
- 7.8.1.2. *End Date* – this is the date that the event is scheduled to end formatted: MM/DD/YYYY
- 7.8.1.3. *Start Time* – this is the time that the event is scheduled to occur formatted: HH:MM a.m. or p.m.
- 7.8.1.4. *End Time* – this is the time that the event is scheduled to end formatted: HH:MM a.m. or p.m.
- 7.8.1.5. *Name* – this is the customer or employer contact name formatted: Last Name, First Name.
- 7.8.1.6. *Event* – this field is the title of the event and can be scheduled meetings, start date reminders, service reminders, etc.
  - 7.8.1.6.1. This information is automatically populated if the Inbox item is generated from the reminder batch job.
  - 7.8.1.6.2. If the Inbox item is generated from an appointment scheduled in Customer Detail or Employer Detail, the information is user-defined.
- 7.8.1.7. *Description* – this is a description of the event.
  - 7.8.1.7.1. This information is automatically populated if the Inbox item is generated from the reminder batch job.

Mediated Business Requirements  
Staff

- 7.8.1.7.2. If the Inbox item is generated from an appointment scheduled in Customer Detail or Employer Detail, the information is user-defined.
- 7.8.2. The Inbox tab shall display a maximum of 1000 inbox items.
  - 7.8.2.1. If there are more than 1000 inbox items, the following warning shall be displayed:
    - 7.8.2.1.1. Warning: "Only the first 1000 are shown."
- 7.8.3. The buttons available for the Inbox tab are:
  - 7.8.3.1. *Delete Message* – this button allows the user to delete Inbox messages when they are no longer needed.
    - 7.8.3.1.1. The application does not automatically delete messages.
      - 7.8.3.1.1.1. The user must manually delete the Inbox items to remove them from the display list.
      - 7.8.3.1.2. The user may choose multiple messages to delete.
        - 7.8.3.1.2.1. When multiple messages are selected, the Detail button will be disabled.
        - 7.8.3.1.3. Once a message is chosen for deletion and the OK button is clicked, the message shall be removed from the screen.
          - 7.8.3.1.3.1. Selecting the 'Save' button described in Section 7.3 shall be required to save the deletion in the database.
    - 7.8.3.2. *Detail* – this button allows the user to view detail about the person identified in the Inbox message.
      - 7.8.3.2.1. If the person is an employer contact, then the user will be taken to the Employer Detail/Contact Info tab.
      - 7.8.3.2.2. If the person is a customer, then the user will be taken to the Customer Detail/General Info tab.
    - 7.8.3.3. *Additional Info* - this button provides access to additional information that is available about the inbox item.
      - 7.8.3.3.1. This button shall be disabled when there is no additional information available about the selected Inbox item.
      - 7.8.3.3.2. This button shall be disabled if multiple inbox items are selected.
      - 7.8.3.3.3. When selected, a popup window shall be displayed with the additional information.
        - 7.8.3.3.3.1. Tab Name: "Additional Info"
        - 7.8.3.3.3.2. The verbiage displayed will be the corresponding information that may be available.
        - 7.8.3.3.3.3. A button shall be provided to close the popup window.
          - 7.8.3.3.3.3.1. Button Text: "OK"
    - 7.8.3.4. *Print* - the list of Inbox items can be printed by clicking on the Print button.
      - 7.8.3.4.1. A scrollable pop-up window displays all the information on the tab.
      - 7.8.3.4.2. Two buttons are displayed at the bottom of the screen:
        - 7.8.3.4.2.1. Print- sends the list to the user's printer.
        - 7.8.3.4.2.2. Cancel- closes the pop-up window and returns the user to the previous screen.

Mediated Business Requirements  
Staff

7.8.4. The Inbox data is collected in the database in the following four ways:

- 7.8.4.1. Scheduling an appointment via the Schedule Appointment button on Customer Detail/General Info tab.
  - 7.8.4.1.1. Appointments scheduled in this manner are added to the Inbox upon being saved.
- 7.8.4.2. Scheduling an appointment via the Schedule button on the Employer Detail/Contact Info tab.
  - 7.8.4.2.1. Appointments scheduled in this manner are added to the Inbox upon being saved.
- 7.8.4.3. Re-opening a closed enrollment from the Customer Services/Enrollment tab.
  - 7.8.4.3.1. This reminder shall be created for each re-opened program enrollment per indication of a flag in the Federal Program table in Admin.
  - 7.8.4.3.2. This reminder shall be created for the administrator that terminated the enrollment.
  - 7.8.4.3.3. The reminder shall consist of the following information:
    - 7.8.4.3.3.1. Start Date column: The current start date of the reminder formatted: MM/DD/YYYY
    - 7.8.4.3.3.2. End Date column: The current end date of the reminder formatted: MM/DD/YYYY
    - 7.8.4.3.3.3. Start Time column: The current time of day, formatted HH:MM (am or pm)
    - 7.8.4.3.3.4. End Time column: The current time of day, formatted HH:MM (am or pm)
    - 7.8.4.3.3.5. Name column: Name of the customer formatted: Last Name, First Name
    - 7.8.4.3.3.6. Event column: "Enrollment Reopened."
    - 7.8.4.3.3.7. Description column: "<FED PGM> Reopened for <SEEKER ID>"
      - 7.8.4.3.3.7.1. <FED PGM> shall be replaced with the name of the Federal Program.
      - 7.8.4.3.3.7.2. <SEEKER ID> shall be replaced with the customer ID associated to the re-opened enrollment.
- 7.8.4.4. Via a nightly batch job that looks for certain date triggers in the database.
  - 7.8.4.4.1. Appointments/reminders scheduled in this manner are added to the Inbox when the batch job has completed running.
  - 7.8.4.4.2. The date triggers used for determining when an Inbox item is to be created are established by data collected in the Customer Services/Achievement Objectives and Customer Services/Services tabs.
    - 7.8.4.4.2.1. The triggers are listed in the following table, along with the event name and event description that will display for the reminder when it is added to the Inbox:

Tab	Trigger	Event_Name	Event_Description
-----	---------	------------	-------------------



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Mediated Business Requirements  
Staff

Tab	Trigger	Event_Name	Event_Description
Achievement Objective	The day before this date and actual_start_date = null	Reminder	Achievement objective to start
Achievement Objective	Today's date = Planned_start_date and the actual_start_date = null	Reminder	Objective should start today
Achievement Objective	The day after this date and Actual_start_date equals null	Missed date	Missed achievement objective start date
Achievement Objective	The day before this date and the actual_end_date = null	Reminder	Achievement objective to end
Achievement Objective	Today's date = Planned_end_date and actual_end_date = null	Reminder	Objective should end today
Achievement Objective	The day after this date and Actual_end_date equals null	Missed date	Missed achievement objective end date
Achievement Objective	The day before this date	Reminder	Objective/Services review
Achievement Objective	This date plus 90 days	Reminder	Follow up
Achievement Objective	This date plus 120 days	Reminder	Follow up
Customer/Services	Today's date = Planned_start_date and actual_start_date = null	Reminder	Service should start today
Customer/Services	Today's date = Planned_end_date and actual_end_date = null	Reminder	Service should end today
Customer/Services	The day after this date and Actual_end_date is null	Missed date	Service should have ended.
Customer/Services	The day before this date	Reminder	Service review
Customer/Services	The <60th> day after the last actual end date for all services and activities, plus any hold days that fall after the date of last service or activity. <60th> is configurable	<PGM> exit candidate <PGM> is replaced with name of Federal program	No recent <PGM> services or activities <PGM> is replaced with name of Federal program
Customer/Services	<90> days after the latest c-time for activities or actual end date for services, plus any hold days that extend the date. <90> is configurable	<PGM> Soft Exited <PGM> is replaced with name of Federal program	Exited due to no <PGM> services or activities in the past <#> days. <YOUTH> <PGM> is replaced with name of Federal program. <#> is replaced with the number of days before a program is soft exited. <YOUTH> is replaced with ""*Achv Obj End Date Set For WIA Youth" when an end date for an achievement objective is set for a WIA Youth Enrollment.



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Mediated Business Requirements  
Staff

Tab	Trigger	Event_Name	Event_Description
Customer/Services/ Enrollments	If the Soft Exit process closes an enrollment that has previously been exited in a different calendar quarter and also has manual outcome field information filled in.	Review Prior Exit w/Manual Outcomes	<PGM> Enrollments has been Soft-Exited. Previous exit date-dependent manual outcomes should be confirmed.  <PGM> is replaced with the name of the Federal program.
Customer/Services Literacy/Numeracy	This date plus 300 days.	Reminder	Post Test should be given.

7.8.4.4.2.1.1. Normal inbox items (reminders and missed dates) for services shall be suppressed for SS/IO services.

7.8.5. If a staff member does not have an active status, the application will forward associated Inbox items to that staff member's active supervisor.

7.8.5.1. If that supervisor does not have an active status, the application will forward the Inbox items to another active supervisor within that supervisor's office by lowest ID number.

7.8.5.1.1. If there are no active supervisors within that office, the application will return to the original staff member, the Inbox item will not be created and an error will be logged.

7.8.6. The Soft Exit Reminder notice shall be configurable by program so it is not sent to Employment Services staff.

7.8.7. The Soft Exit Update notification shall be configurable by program so it is not sent to Employment Services staff.



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## SECURITY AND STAFF MODULE

Individual security levels for each module appear in the bottom right corner of your screen.

**SECURITY is implemented on two (2) levels:**

- **PROCESS LEVEL SECURITY** - imposes restrictions on the types of available transactions and on the buttons available to the user.
  - Delete – authority to delete information/records (highest level of security)
  - Add – (a.k.a. Insert) authority to add new information/records
  - Change – (a.k.a. Update) edit existing information/records
  - View – (a.k.a. Select) view information/records (view or higher is granted Search authority)
  - None – none of the above
- **TAB LEVEL SECURITY** - imposes restrictions on specific window pages (tabs) that user can access.
  - Unavailable pages (tabs) are grayed-out. When these are grayed out staff do not have access to perform the function.

**STATUS BAR** – at the bottom of page, displays the user logged in, the office, tab security level and the current date of log in.

## STAFF MODULE

### I. STAFF DETAIL

**STAFF DETAIL** is the first screen opened in EKOS, Tabs included are:

- **INBOX** – Provides current list of appointments and event reminders and events. Appointments are generated using the Schedule button function in Customer Detail/Employer Detail (Contact Info) modules.
- **REFERRALS IN** lists customers that have been referred to the agency/office of the currently logged-in staff person (IA Referrals go to partner offices to all staff)

### II. STAFF PREFERENCES

**STAFF PREFERENCES** allows users to change password and office logged into

- **OFFICE** – If you work in multiple offices you need to change offices. If the offices you work in are not listed in your “Change Office To” drop down list the EKOS security contact for your location needs to email [EKOS.PROJECT@KY.GOV](mailto:EKOS.PROJECT@KY.GOV) and request the additional offices to be added in your preference choices.  
*(There is an Activity Report that shows individuals staff activities and an Employer Activity Report)*

**III. PASSWORD** – Password should be changed every month or quarter for security purposes.

## COMMON MEASURES AT-A-GLANCE

### ADULT MEASURES

#### Entered Employment Rate (EER)

*Measure: Of those who are not employed at participation, the percentage of individual's employer in the 1<sup>st</sup> quarter after program exit*

- Includes only those not employed at participation.
- Entry to employment is based on wage record data and other administrative data sources.
- Employment status at the start of participation is self-reported by jobseekers.

#### Employment Retention Rate (ERR)

*Measure: Of those who are employed in the first quarter after the exit, the percentage employed in the 2<sup>nd</sup> and 3<sup>rd</sup> quarter after exit*

- Of those employed in the 1<sup>st</sup> quarter after exit, measure applies to individuals that were not employed at the start of participation, as well as those who were employed at the start of participation.

#### Average Earnings (AE)

*Measure: Of those adult participants who are employed in the first, second, and third quarters after the exit quarter*

- Total earnings in the second quarter plus the total earnings in the third quarter after the exit quarter divided by the number of adult participants who exited during the quarter.

**COMMON MEASURES**  
**Includes Exits – Measures – Reporting**

ETA (Employment & Training Administration) – Adopted common measures methodology for the calculation of the

1. Entered Employment (EER) those who are not employed at date of participation and become employed in first quarter after exit.
2. Employment Retention (ERR) those employed in first quarter after exit quarter, the percentage of adult participants employed in 2<sup>nd</sup> and 3<sup>rd</sup> quarters after exit
3. Average Earnings (AE) those adult participants who are employed in the 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> quarters after the exit quarter.

**Individuals who are employed at the date of participation are excluded from EER.** ETA will continue to collect the pre-program earnings, as well as other information on participants, and supplement this measure with data on Average Earnings when describing program outcomes.

WIA (Workforce Investment Area) – **Performance accountability system for**

1. WIA Adult
  2. Dislocated Worker
  3. Youth Program
  4. Trade Act
  5. Jobs for Vets Act
  6. Labor Exchange (OET) Wagner – Peyser Act
- Common Measures reporting system calculates performance outcomes based on exit quarters
  - Exit occurs when a participant does not receive a service funded by the program or partner program for 90 consecutive calendar days and is not scheduled for future services.
  - The date of exit is applied retroactively to the last day on which the participant received the last service
  - This is called a “Soft Exit”
  - A job seeker can exit four (4) times in one year (i.e. There are four (4) 3 Month Quarters in a year)

- (1) **EE** – (Entered Employment, How many people went to work) Not employed at participation, the number of adult participants who are employed in the 1<sup>st</sup> quarter after program exit divided by the number of adult participants who exit during the quarter. *(Individuals who are employed at the date of participation are excluded from this measure and programs will not be held accountable for these individuals under this measure) (Individuals who, although employed at date of participation, have either received a notice of termination of employment or whose employer has issued a Worker Adjustment Retraining Notification (WARN) or other notice that the facility or enterprise will close, or who are transitioning service members are considered not employed at the date of participation and are included in the performance measure.*
  
- (2) **ER** – (Employment Retention, Stayed Employed) The number of adult participants who are employed in both the second and third quarters after the exit quarter divided by the number of adult participants who exit during the quarter *(Employment at the date of participation is based on information collected from the individual, not from wage records)*
  
- (3) **AE** - (Average Earnings, What did they earn) Adult participants who are employed in the first, second and third quarters after the exit quarter. Total earnings in the second quarter plus total earnings in the third quarter after the exit quarter divided by the number Of adult participants who exit during the quarter.
  
- Outcome exclusions that apply to WIA Adults, Dislocated Workers, Wagner-Peyser, and Vets
  - Institutionalization
  - Health/Medical or Family Care
  - Reservist called to active duty
  - Deceased
  - Relocated to Mandated Residential Program

**Any partner that contributes to a positive outcome in Common Measures gets credit. It's an all-for-one goal. EKOS is a One Stop System used in combination with all partners to reach positive performance. Reports are sent to DOL**

**May have 4 Common Measure Enrollments within a year  
(9002 Activities are Common Measure Performances)**

## **Employ Kentucky Operating System (EKOS)** *Reportable Participant Activities*

### **Labor Exchange Reportable Activities:**

There are specific *activities that must be reported* for your participants to ensure they are registered with Employment Services and are enrolled in Labor Exchange federal performance measures and Common Measures. These activities are all those identified as Common Measures Enrollment.

### **Labor Exchange Non Common Measures Enrollment Reportable Activities:**

Another category of activities listed in the Labor Exchange Category that do not generate a Labor Exchange enrollment for your participant are the Self-Service activities and others identified in this category. However, these activities do allow for reporting and tracking that can be used for state and local reporting and should be reported for your participants.

### **Employment and Training Reportable Activities:**

There are some Common Measures Enrollment activities included in the Employment and Training Category. However not all activities listed in this category will generate a Labor Exchange Enrollment for your participant.

### **State Specific Activities:**

Activities included in the State Specific Category allow for reporting and tracking of One-Stop activity and/or for specific Program related activities. Reporting these activities will not generate a Labor Exchange enrollment for your participant.

If you have any questions or problems relating to reporting activities for participants please contact the EKOS Support Team at [EKOS.Project@ky.gov](mailto:EKOS.Project@ky.gov).

**To View Participant Activities Definitions Click on Link Below**

<http://my.edcabinet.ky.gov/EKOSNewsletters/EKOSParticipantActivities0508.pdf>

**To View Employer Activities Definitions Click on Link Below**

[http://my.edcabinet.ky.gov/EKOSNewsletters/Definitions\\_Employer\\_Activities\\_May07.doc](http://my.edcabinet.ky.gov/EKOSNewsletters/Definitions_Employer_Activities_May07.doc)

Office of Employment and Training  
 Division for Field Services  
 Office Activity Report

FROM 01/01/2009 TO 02/18/2009

LOCAL OFFICE :

Staff Name:

	Total	Female	Male	Male over 21	Profiled UI	Veteran					Minority	Migrant	Disability	Disadv	Dislocated Worker	Welfare	Youth
						Vet Total	Vietvet	Disab Vet	Special Disabled	Other Elig							
<b>Labor Exchange</b>																	
<b>Assessment</b>	4	2	2	2	2	4	0	0	0	0	3	0	1	0	0	0	0
Assessment Interview, Initial Assessment	4	2	2	2	2	4	0	0	0	0	3	0	1	0	0	0	0
<b>Case Management</b>	4	2	2	2	2	4	0	0	0	0	3	0	1	0	0	0	0
Assigned Case Manager (Vets Only Service)	4	2	2	2	2	4	0	0	0	0	3	0	1	0	0	0	0
<b>Informational/Self-Service</b>	46	4	42	42	34	46	11	4	4	0	35	0	10	0	1	0	0
Utilizing Resource Rooms	46	4	42	42	34	46	11	4	4	0	35	0	10	0	1	0	0
<b>Job Search Assistance</b>	102	14	87	87	70	102	27	22	6	0	62	0	16	0	1	0	0
Job Development Contact	59	6	53	53	40	59	18	15	4	0	35	0	9	0	0	0	0
Workforce Information Services Staff Assisted (LM)	43	8	34	34	30	43	9	7	2	0	27	0	7	0	1	0	0
<b>Match</b>	426	16	409	409	332	426	117	60	24	0	287	0	81	2	0	2	0
Match	426	16	409	409	332	426	117	60	24	0	287	0	81	2	0	2	0
<b>Other Reportable Services</b>	70	9	60	60	49	70	20	19	3	0	43	0	10	0	0	0	0
Other reportable services (ES, DVOP, LVER)	70	9	60	60	49	70	20	19	3	0	43	0	10	0	0	0	0



Office of Employment and Training  
 Division for Field Services  
 Office Activity Report

FROM 01/01/2009 TO 02/18/2009

LOCAL OFFICE : .....

Job Search Results

	Total	Female	Male	Male over 21	Profiled UI	Veteran					Minority	Migrant	Disability	Disadv	Dislocated Worker	Welfare	Youth
						Vet Total	Vietvet	Disab Vet	Special Disabled	Other Elig							
<b>Job Referral</b>	170	58	112	105	107	24	6	2	3	0	106	0	25	3	1	0	10
Interstate Job Referral	70	32	38	36	38	6	1	0	3	0	42	0	11	1	0	0	2
Referred to Job FT Regular (Over 150 Days)	63	19	44	43	44	16	5	2	0	0	42	0	10	2	1	0	4
Referred to Job FT Short-Term (1 - 3 Days)	5	2	3	2	4	0	0	0	0	0	3	0	1	0	0	0	1
Referred to Job FT Temporary (4 - 150 Days)	15	4	11	11	10	2	0	0	0	0	7	0	1	0	0	0	0
Referred to Job PT Regular (Over 150 Days)	8	1	7	5	3	0	0	0	0	0	6	0	0	0	0	0	2
Referred to Job PT Temporary (4 - 150 Days)	9	0	9	8	8	0	0	0	0	0	6	0	2	0	0	0	1
<b>New Customer</b>	159	62	97	84	6	10	6	6	0	0	125	0	9	2	0	0	25
New Job Seeker - Staff Assisted	159	62	97	84	6	10	6	6	0	0	125	0	9	2	0	0	25

## Performing Interactive Voice Response (IVR) Transactions

The AOSOS Interactive Voice Response (IVR) functionality in the Customer module allows you to select a pre-defined IVR script to be associated with the customer information for one or more selected customers, and stored in an IVR table for retrieval by an IVR vendor. This functionality is used to remind customers of scheduled training sessions, or to request updates to their current status. If you select multiple customer records, a separate transaction will be recorded for each customer. Only one IVR script can be selected for a list of customers. IVR scripts are defined using the AOSOS Admin application (see your *AOSOS Admin Guide* for details) and stored in a state-configurable domain table.

To initiate an IVR transaction for one or more customers:

1. Perform a customer search and sort your search results as desired.
2. Select the list entries for the customers for whom IVR transactions will be created.
  - a. To select a *sequential* group of search results from your list:
    - 1.) Click to highlight the first record in the desired group.
    - 2.) Hold down the **Shift** key, and click on the last record in the desired group. All records in the selected range will be highlighted.
  - b. To select a *non-sequential* group of search results from your list:
    - 1.) Hold down the **Alt** key, and click to highlight each record in the desired group.
  - c. To select all customer records in your list:
    - 1.) Click on the **Select All** button. All list entries will become highlighted to indicate that they are selected.

3. Click the **IVR** button at the bottom of the Customer Search window. The IVR Script Selector pop-up window (Figure 2-33) will appear.

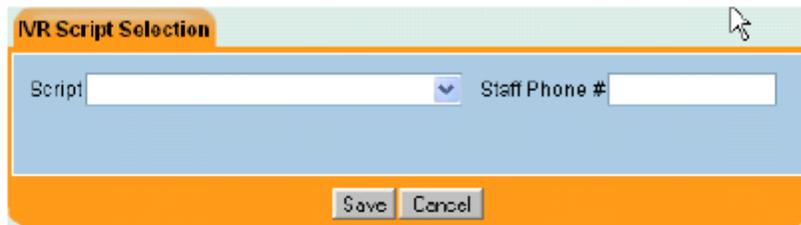


Figure 2-33. The IVR Script Selector Pop-Up Window

4. Select a pre-defined IVR script by clicking on the arrow button (▼) and selecting the desired script name from the drop-down list.
5. To assign a staff member's phone number to the transaction(s), enter the phone number (including the area code) in the **Staff Phone #** field. If no phone number is entered in this field, the phone number of the currently signed-on staff person's office will be assigned to each transaction by default.
6. Click **Save** to save the transaction(s), or **Cancel** to cancel the operation and return to the Customer Search window.



*If a selected customer does not have a phone number assigned to it, the customer's IVR transaction will be disregarded. The user is not given any warning regarding this failure.*

**For a full reading of each scrip and the results codes for the outbound calls**

**Click this link**

<http://my.edcabinet.ky.gov/ekosinfo/EKOSIVRScripts.pdf>

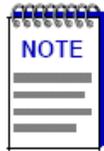
**For viewing the results of your IVR calls**

**Click this link**

[http://my.edcabinet.ky.gov/ekosinfo/ivr\\_results.htm](http://my.edcabinet.ky.gov/ekosinfo/ivr_results.htm)

## Performing Customer Correspondence

The **Correspond** button, located at the bottom of the Customer Detail window, allows you to generate customer correspondence through the use of Microsoft® Word™'s Mail Merge, template generation, and word processing functionality. AOSOS exports data required by Mail Merge. Microsoft Word allows the generated correspondence to be printed, faxed, and/or emailed, as necessary.



*You must have Microsoft® Word™ installed on your client machines in order to use the AOSOS Correspondence functionality.*

To initiate customer correspondence from the Customer Detail window:

1. Click the **Correspond** button at the bottom of the Customer Detail window.

See **Chapter 7, AOSOS Correspondence**, for further instructions on performing AOSOS customer correspondence.

## Correspondence Help

The AOSOS **Help** menu provides a link to the OSOS Correspondence Help web site, which allows you to quickly obtain the necessary correspondence and data source templates. This site also includes instructions for placing the correspondence templates in the proper directory, modifying a client machine's autoexec.bat file, and creating custom correspondence templates. To launch the OSOS Correspondence Help web site:

1. Click on the **Help** menu in the menu bar, and select **Correspondence Help** from the menu. A client browser window will open and navigate to the Correspondence Help web site (Figure 7-1).



Figure 7-1. The OSOS Correspondence Help Site

## Initiating Correspondence

AOSOS Correspondence can be initiated (using the **Correspond** button) from several locations within the AOSOS application, including the:

- Customer Detail window (customer correspondence)
- Customer Comprehensive Assessment window (customer correspondence)
- Customer Search window (customer correspondence)
- Employer Detail window (employer correspondence)
- Employer Search window (employer correspondence)
- Job Order Detail window (employer *and* referral correspondence)



*Employer correspondence is **automatically** initiated from the Job Order Detail window after a job order is created and successfully saved with a status of **Open**. The purpose of this is to notify the employer that their job order has been entered into AOSOS. A copy of the job order will be appended to the correspondence. The template used for this type of correspondence is called **Employer\_JO\_Thank\_You.dot**.*

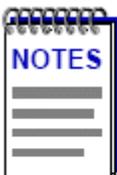
*This type of correspondence uses the data items included in the Job Order Save Summary data source file (*JobSaveSummaryDataSrc.doc*).*

*Note that this will only occur when a job order is **first** created and saved with a value of **Open**. If you update and save the job order later, correspondence **will not** launch automatically.*

- Provider Detail window (provider correspondence)
- Provider Search window (provider correspondence)

If you initiate correspondence from within the Customer, Employer or Provider Search window, you have the ability to select several recipients before clicking the **Correspond** button. If you do so, the Microsoft Word correspondence document will, after the Mail Merge operation, contain multiple copies of the selected correspondence type, separated by page breaks within the document.

All other correspondence methods will generate a single copy of the selected correspondence type.

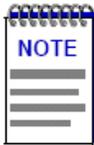


*AOSOS Employer and Provider correspondence can only be conducted with employers and providers that have at least one contact person designated in the system. Use the **Contact Info** page of the Employer or Provider Detail windows to add a contact before attempting to correspond with the employer or provider.*

*Before initiating correspondence from the Employer or Provider Search windows, you must first display the contact information in the search results list using the **Show/Hide Contacts** button.*

## Completing Correspondence

Once correspondence has been initiated, a correspondence template must be selected. Microsoft Word will display the template and the Mail Merge operation will be automatically conducted. The correspondence can then be modified and sent, as desired.



*This section contains enough Microsoft Word instruction to perform the basic correspondence operation. For complete information on Word's Mail Merge, word processing, printing, fax, and/or email functionality, consult your Microsoft Word user documentation or online help.*

1. After correspondence has been initiated, the Pick a Document Template pop-up window (Figure 7-2) will appear.

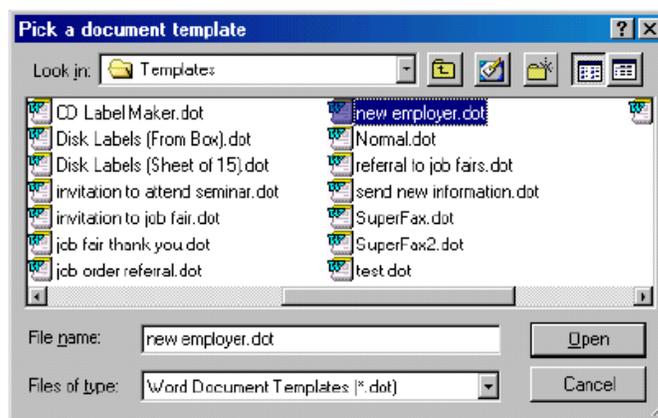


Figure 7-2. The Pick a Document Template Pop-Up Window

2. Using this window, browse (if necessary) to your client machine's **C:\Program Files\Microsoft Office\Templates** directory and locate the template (.dot) file that you wish to use.
3. Click on the template file (it will become highlighted to indicate that it is selected) and click the **Open** button. Microsoft Word will start (if necessary) and display the selected template (see Figure 7-3).

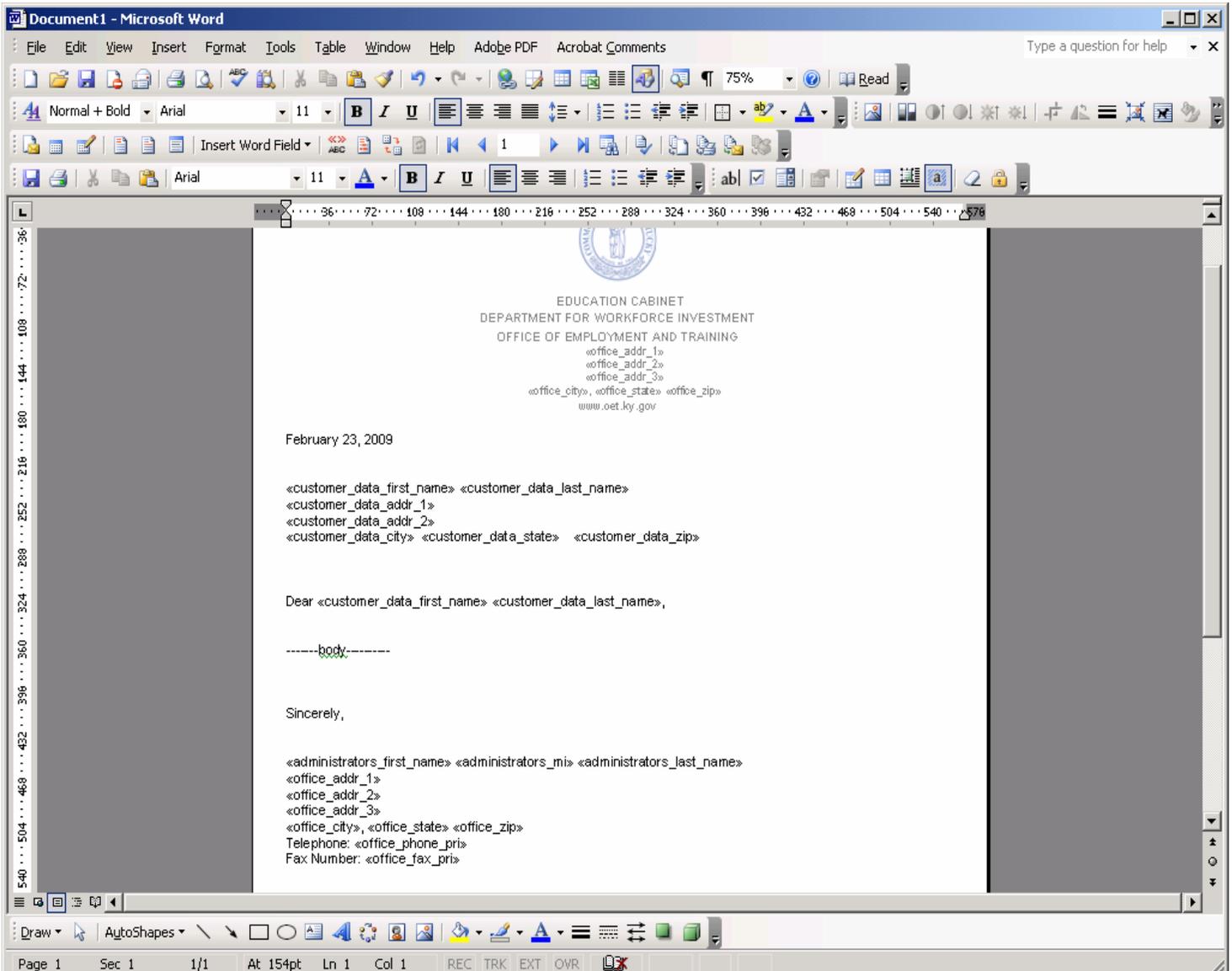


Figure 7-3. Correspondence Template Displayed in Microsoft Word (Pre-Merge)

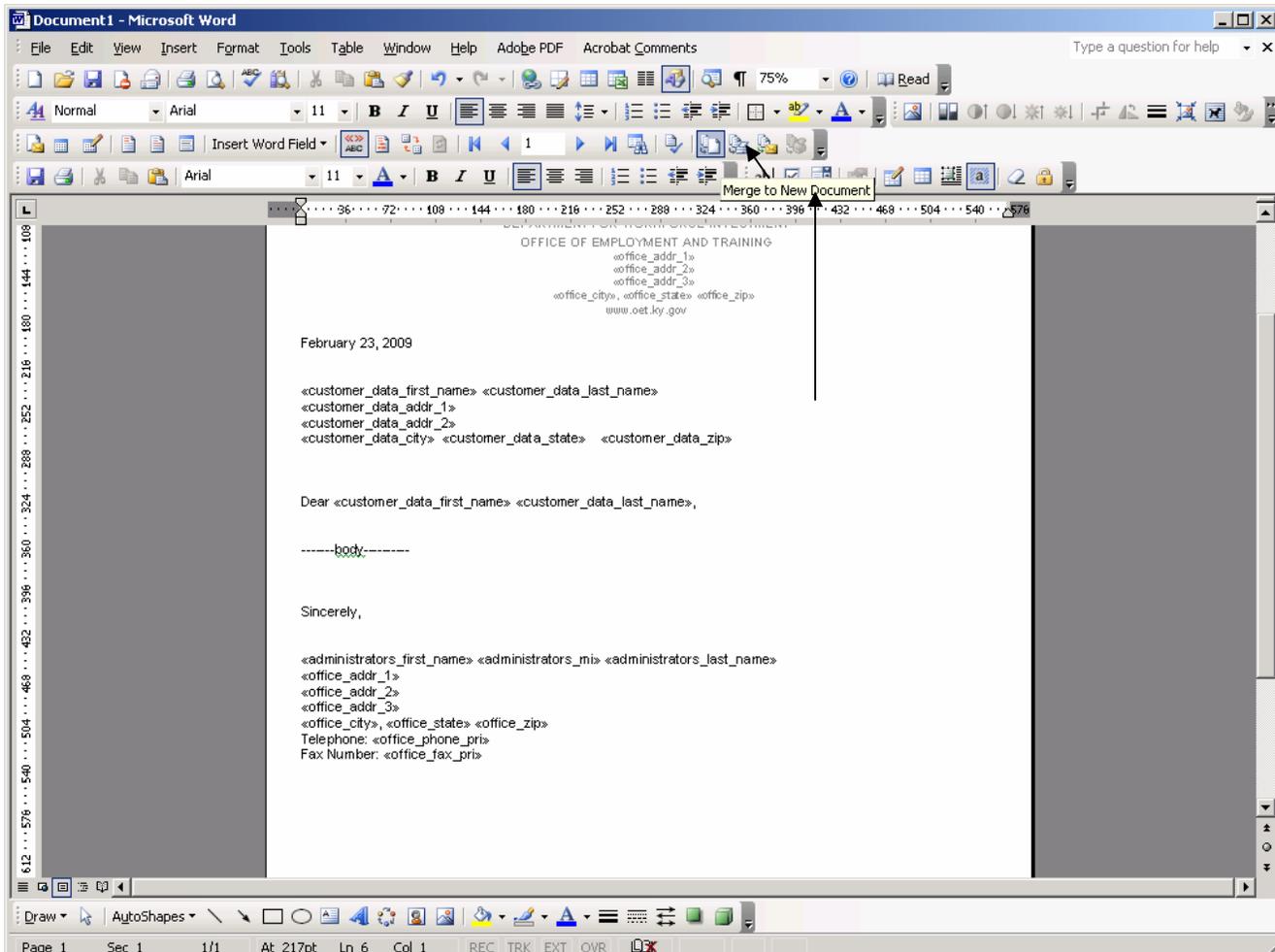
If necessary, modify the displayed template as desired.



*Some AOSOS correspondence templates contain text that is enclosed within single angle brackets (e.g., <text>). This text must be replaced manually, either before or after performing Mail Merge. This data is not part of the exported AOSOS data source.*

4. On your Microsoft Word Menu select **Tools / Letters and Mailings** and select (Show Mail Merge Toolbar)

5. Click on the Merge to New Document icon



6. Select ALL and click the OK Button



*Some AOSOS correspondence templates contain text that is enclosed within single angle brackets (e.g., <text>). This text must be replaced manually, as this data is not part of the exported AOSOS data source.*

## Performing Inter-Agency Referrals

The **I.A. Referrals** button, located at the bottom of the Customer Detail window, launches the Inter-Agency Referral pop-up window which allows you to refer an *active* customer to another agency, or to another office within the same agency. When an interagency referral is performed, the referral will appear on the Referrals In page of the Staff window for the destination agency, where it can be accepted or denied. Refer to the AOSOS Staff Services User's Guide for information on processing interagency referrals.

To perform an interagency referral for the displayed customer record:

1. Click the **I.A. Referrals** button at the bottom of the Customer Detail window. The Interagency Referral pop-up window (Figure 3-48) will appear.

**Inter-Agency Referral**

SSN 117-11-1114 OSOS ID NY930333190

Last Name QA\_RESERVE

First Reserve MI

Referral Date 08/04/2006 Date of Birth 10/10/1970

Phone

Address QA Reserve please do not use

City syracuse

State New York Zip 13202

Referring Staff Professional, Workforce

Referring Agency DEPARTMENT OF LABOR

Referring Office Buffalo

Phone Ext

● Destination Agency

● Destination Office

Appointment Date Appointment Time

● Reason Referred

Save Print Cancel

Figure 3-48. The Inter-Agency Referral Pop-Up Window



The customer's detail information will be displayed in the display-only fields in this window. Your name, and office information will be displayed in the referring staff, agency, and office fields.

2. Click the **Change Office** button next to the Referring Agency and Office field to change the Referring Agency, and Office. The WIB-Agency-Office Select pop-up window (Figure 3-49) will appear.
  - a. Select the desired office from the hierarchy shown. Click **OK** to return the selected value to the I.A. Referral page and close the window.
  - b. Click **Clear** to clear the Referring Office value on the I.A. Referral page and close the window.
  - c. Click **Cancel** to close the window and leave the referring office unchanged.

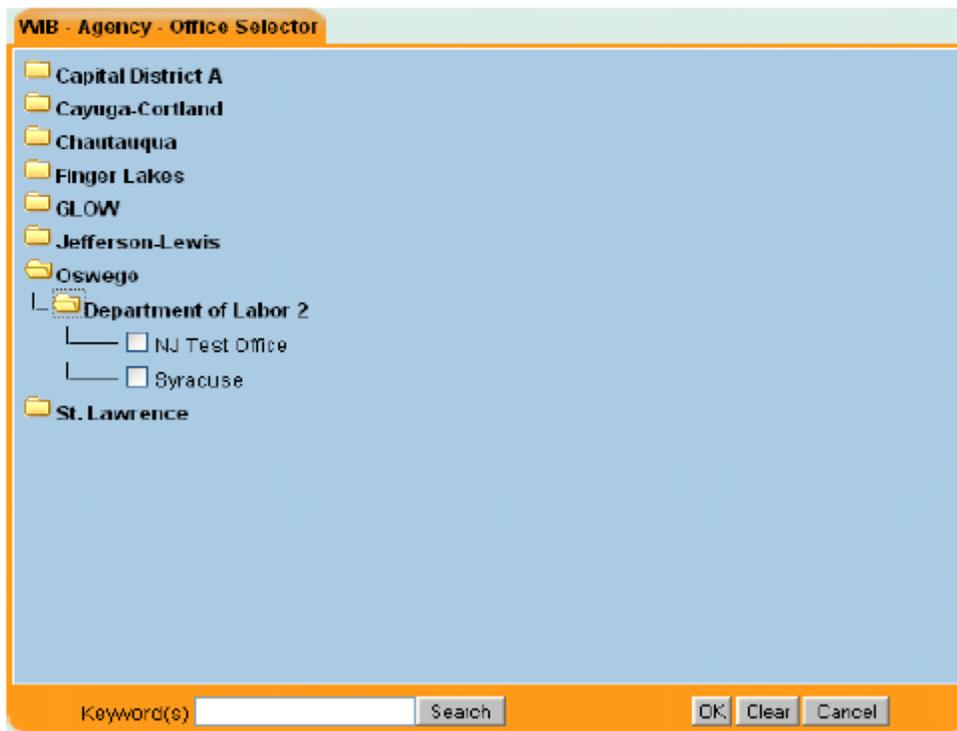


Figure 3-49. WIB - Agency - Office Selector pop-up window.

3. Enter your 10-digit phone number, including the area code, in the **Phone** field. The number will be formatted by the system (i.e., separators, such as dashes, are automatically inserted), so enter only numeric characters.
4. If necessary, enter your phone extension number (up to 5 digits) in the **Ext** field.
5. Select the referral's destination agency and office as follows (required field):
  - a. Click the **Select Office** button to the right of the **Destination Agency** and **Office** fields. The WIB-Agency-Office pop-up window ([Figure 3-10](#)) will appear.

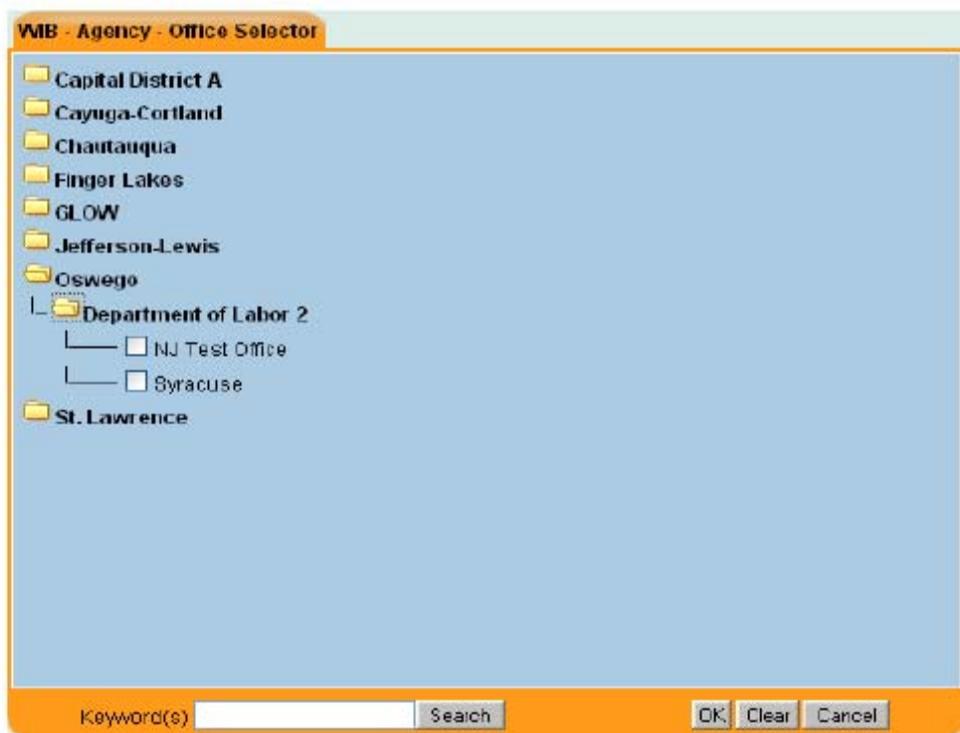


Figure 3-50. The WIB-Agency-Office Selector Pop-Up Window

When it is initially launched, the window displays a list of state WIBs.

- b. Locate and click on the WIB name that includes the desired destination agency location. The selected WIB will expand into a tree structure, listing all agencies that are located in that WIB.
  - c. Locate and click on the desired destination agency name within the window's tree structure. The selected agency will expand into a tree structure, listing all of that agency's locations in the selected WIB.
  - d. Locate and click on the desired agency location within the window's tree structure. The location will be highlighted to indicate its selection.
  - e. Click the **OK** button. The pop-up window will disappear, and the selected values will be displayed in the **Destination Agency** and **Office** fields.
6. In the **Appointment Date** field, enter the date (in **mmddyyyy** format) on which the customer is to meet with the destination agency's representative. The number will be formatted by the system (i.e., separators, such as slashes, will be automatically inserted), so enter only numeric characters.
  7. In the **Appointment Time** field, enter the time (in **hhmm am/pm** format) at which the customer will meet with the destination agency's representative. The number will be formatted by the system (i.e., separators, such as colons, will be automatically inserted), so enter only numeric characters and **am** or **pm**.
  8. In the **Reason Referred** field, enter text describing the reason for the customer's interagency referral. (This is a required field)
  9. Click the **Save** button to save the interagency referral, or click **Cancel** to cancel the operation and return to the Customer Detail window.

### **Printing Inter-Agency Referrals**

To print the Inter-Agency Referral:

1. Click the **Print** button on the bottom of the Inter-Agency Referral popup window. A Print Preview pop-up window will appear, allowing you to view the Inter-Agency Referral as it will be printed.
2. In the pop-up window, click the **Print** button. The list will be sent to your configured print queue. To cancel the operation, click **Cancel**.

## Performing Matches from the Customer Module

1. Using the Customer Search window, locate the desired customer for the Match operation (see **Chapter 2, AOSOS Customer Search** for instructions) and display it in the Customer Detail window (see [Figure 4-6](#)).

**OR**

Create and save a new customer record (see **Chapter 3, AOSOS Customer Detail** for instructions) using the Customer Detail window (see [Figure 4-6](#)).

2. If desired, display the Objective page of the Customer Detail window and click on one of the entries in the **O\*Net Titles** list box. The selected O\*Net title will be used to pre-populate the **O\*Net Title** field on the General Info page of the Job Order Search window.



*If you **do not** select an O\*Net title from the customer's record before starting the Match operation, the system will use the first title listed in the **O\*Net Titles** list box to pre-populate the **O\*Net Title** field in the Job Order Search window.*

3. In the Customer Detail window, click the **Match** button (see [Figure 4-6](#)). The Job Order Search window will appear. Several Job Order Search window fields will be pre-populated with criteria from the customer record. (see [Figure 4-7](#)).

<input type="checkbox"/>	SSN	Vet	Status	Seeker Name	Objective
<input type="checkbox"/>	032-54-6875	Yes	Active	Akkineni, Harsh	EO5648
<input checked="" type="checkbox"/>	564-97-6846	Yes	Active	Akkineni, Kamalakar	EO9002D
<input type="checkbox"/>	657-87-3786	Yes	Active	Akkineni, Neelesh	EO5648
<input type="checkbox"/>	498-78-4541	No	Active	Akkineni, Amarander R.	EO
<input type="checkbox"/>	435-73-8745	No	Active	Akkineni, Bhooopal	EO5627
<input type="checkbox"/>	435-87-8435	No	Active	Akkineni, Charan R	EO
<input type="checkbox"/>	465-37-4874	No	Active	Akkineni, Damodhar	EMP OBJ
<input type="checkbox"/>	678-66-7007	No	Active	Akkineni, Harsh	EO test

Customer Search

Either locate and display or create and save a customer record.

Customer Detail

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services

**Akkineni, Kamalakar** SSN: 564-97-6846 OSOS ID: NY93033215 1 of 1

Gen. Info Add Info Objective Work Hist. Ed. Lic. Skills Saved Searches Activities Comments Tests Cit 1 customer >>>

**Customer Data**

SSN: 564-97-6846 N/A Status: Active Job Seeker: Active

Username: TEST9002D Password: qaree@rd

Last Name: Akkineni First Name: Kamalakar MI:

Date of Birth: 05/21/1945 Gender: Male

Address: 63 Park Lane

City: Syracuse State: New York

Zip Code: 13203 County: Onondaga

Country: United States Metro:

Phone: All Fax:

Email:

U.S. Citizen:

**Customer Assignment**

Staff Assigned: Annapreddy, Madhavi Change Registered: 05/08/2006

WVIB Assigned: Oswego Origin: Staff

Agency: DEPARTMENT OF LABOR Change Office Profiled

Office: Syracuse Profiled Date:

UI Claimant: Internet Resume:  Confidential:

**Ethnic Heritage**

None Selected

Hispanic or Latino

Not Hispanic or Latino

**Race**

Alaskan or American Indian

Asian

Black or African American

Hawaiian or Pacific Islander

White

**Education & Employment**

Education Level: GED

School Status: Not attending school, H.S. Graduate

Employment Status: Not Employed

Print Resume Schedule Appointment

Save Match Services Comp Assess Activity I.A. Renewals Correspond IVR Return to Search Post a Note Tag

Click the **Match** button.

The Job Order Search window will appear (see Figure 4-7). Several Job Order Search fields will be pre-populated with criteria from the Customer record.

Figure 4-6.

Job Order Search window, with search criteria from the customer record.

The screenshot shows a software interface for job order search. At the top, there are four tabs: "General Info", "Job Detail", "List Search", and "Custom". The "Job Detail" tab is selected. The main area contains several sections of search criteria:

- Employment Type:** Full Time (Yes), Part Time, Regular (Yes), Seasonal, Temporary, Short Term.
- Shifts:** First Shift, Second Shift, Third Shift, Rotating Shift, Split Shift, Shift Varies.
- Starting Pay:** Minimum, Maximum, Unit.
- Benefits:** Health Insurance, Dental Insurance, Vacation, Sick Leave, Holidays, Retirement/Pension Plan, Clothing/Uniform Allowance, Child Care.
- Other Criteria:** Hours Per Week, Education Required, Experience Required (Years, Months), Public Transportation.

Below the criteria is a table with the following columns: Company, Title, Order#, Date, Status, Age, OR/MD, #D, #R, #O, #I. The table is currently empty. At the bottom, there is a search bar with the number "25" and buttons for "Search", "Clear", "Detail", "Print List", "Save Search", "Assign to List", "Match", and "Refer".

Use the Job Order Search window to search for matching jobs for the customer.

Figure 4-7.

4. If necessary, enter, change, and/or delete the search criteria on the various tabbed pages of the Job Order Search window (see **Chapter 5, AOSOS Job Order Search**, in the **AOSOS Employer Services User's Guide** for details).



*If you click the Job Order Search window's **Clear** button while performing a Match operation, Match mode will be cancelled. If you wish to remove or change search criteria for your Match operation, you should manually alter the necessary fields. Do not use the **Clear** button to clear the fields.*

5. To limit the size of your result set, click on the arrow button (▼) in the **Search Limit** field, and select the desired result set size (**25**, **50**, or **100**) from the drop-down list.
6. To activate the search, click the **Search** button. Your search results will appear in the Search Results list below the Job Order Search window fields (see [Figure 4-8](#)).

- a. At this point in the Match operation, if your Job Order Search returns any search results, the **Save Search** button will become active. This button allows you to save the search parameters used in this Match operation so that the search can be performed again later. All saved searches will be listed on the Saved Searches page of the Customer Detail window for later use. See **Saved Searches**, on page 4-12, for details on Saved Searches.
7. To match one or more job orders to the customer, select the desired list entries and click the **Match** button. The customer will be listed on the **Matches** page of each selected job order's Detail window (Figure 4-9). A Match activity will also appear on the Customer Detail **Activities** page and the **Service History** page (in the Services module) for each matched job (see Figure 4-10).

To match job orders from this window, highlight the job entries and click the **Match** button.

Figure 4-8.

- a. To review job orders before performing any matches, highlight one or more of your search results and click the **Detail** button. The Job Order Detail window will appear.
- b. Review the job order as necessary.

- c. If you decide to match a job order after reviewing it in the Job Order Detail window, click the **Tag** button at the bottom of the window. The button's label will change to **UnTag**. To deselect the job order, click the **UnTag** button.
- d. Click the **Return to Search** button. The Job Order Detail window will disappear, returning you to the Job Order Search window. You will still be in **Match** mode. If you tagged any job orders in their Job Order Detail windows, their search result list entries will be highlighted.
- e. Click the **Match** button. The customer will be listed on the **Matches** page of the job order's Detail window (Figure 4-9). A Match activity will also appear on the Customer Detail **Activities** page and the **Service History** page (in the Services module) for the matched job (see Figure 4-10).

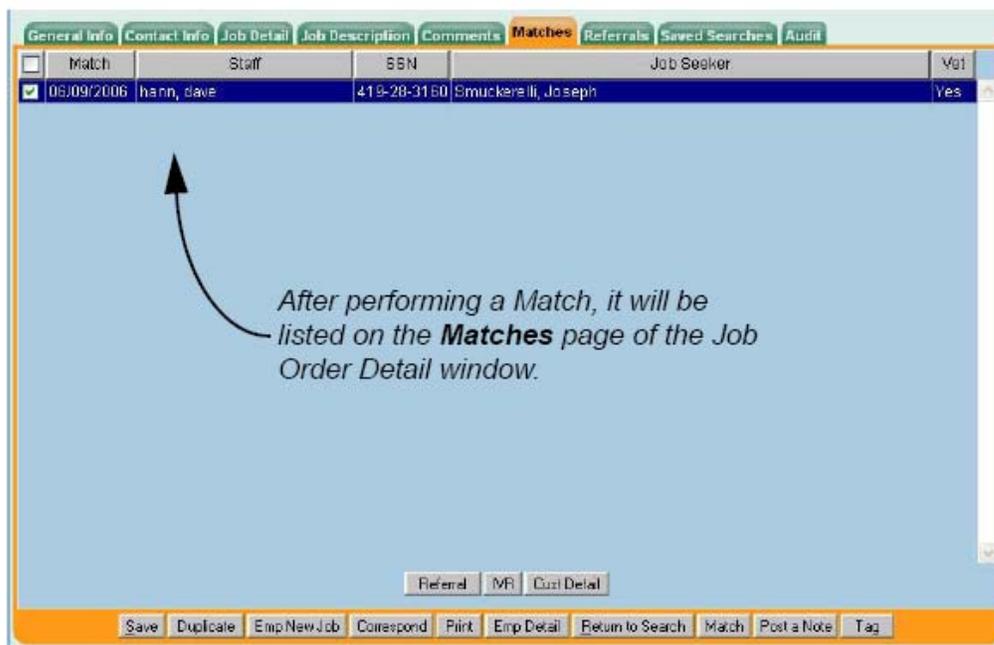


Figure 4-9.

Customer Search Customer Detail Comp Assess Services

Akkineni, Kamalakar SSN: 564-97-6846 OSOS ID: NY93033215 1 of 1

Gen. Info Add'l Info Objective Work Hist. Ed. Lic Skills Saved Searches **Activities** Comments Tests CB1 custom >>

Activity	Activity Date	Office	Staff	Employer	Job ID
<input checked="" type="checkbox"/> Match	05/09/2006	Syracuse	Annappureddy, Mad	Acme Explosives	NY0006079
<input type="checkbox"/> Placement FT Temporary (4 - 150 days)	05/09/2006	Syracuse	Annappureddy, Mad	Acme Explosives	NY0006079
<input type="checkbox"/> New Job Seeker - Staff Assisted	05/08/2006	Syracuse	Annappureddy, Mad		
<input type="checkbox"/> Referred to Job FT Temporary (4 - 150)	05/09/2006	Syracuse	Annappureddy, Mad	Acme Explosives	NY0006079
<input type="checkbox"/> Job Coaching	05/08/2006	Syracuse	Annappureddy, Mad		
<input type="checkbox"/> Placed in Training (Job Corps)	04/25/2006	Syracuse	Annappureddy, Mad		
<input type="checkbox"/> Common Measures Enrollment	04/19/2006	Syracuse	Annappureddy, Mad		
<input type="checkbox"/> Labor Exchange Enrollment	04/19/2006	Syracuse	Annappureddy, Mad		
<input type="checkbox"/> Assessment Interview, Initial Assessm	04/19/2006	Syracuse	Annappureddy, Mad		

The Match operation will also be listed on the **Activities** page for each matched Customer, and on the Service History page in the Services module.

Customer Detail Window

Delete Activity Print List Detail

Save Match Services Comp Assess Activity LA Referrals Correspond IVR Return to Srch Post a Note Top

Services Window

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess **Services**

Akkineni, Kamalakar SSN: 564-97-6846 OSOS ID: NY93033215

Agency Info Achievement Objectives Services **Service History** Enrollment/outs Outcomes Comments Audit Ltr/Perm Top >>

Service	Date	Staff	Agency	Office
<input type="checkbox"/> Referred to Job FT Temporary (4 - 150 Days)	05/08/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> New Job Seeker - Staff Assisted	05/08/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> Assessment Interview, Initial Assessment	04/19/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> Placed in Training (Job Corps)	04/25/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input checked="" type="checkbox"/> Match	05/09/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> Job Coaching	05/08/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> Placement FT Temporary (4 - 150 days)	05/09/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> Labor Exchange Enrollment	04/19/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> Common Measures Enrollment	04/19/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> Labor Exchange Exit	05/09/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse
<input type="checkbox"/> Common Measures Exit	05/09/2006	Madhav Annappuredd	DEPARTMENT OF LABO	Syracuse

Detail Print List

Save Customer Detail Comp Assess Post a Note Check Labor Market Information

Figure 4-10.

## Outcomes

The Outcomes page of the Services window is used to record required information for the period following exit of a customer's program enrollments (e.g., WIA, Trade Act). Outcome information for an enrollment period can be entered *before or after* its exit.

A customer's enrollment is exited using the **Enrollments** page of the Services window. Clicking this button will close the customer's current enrollment, and begin the Post Tracking period for that enrollment.

If fund allocation for the customer occurs during the Post Tracking period, another enrollment is created. The new enrollment must be managed separately from the original one (i.e., it must be exited and tracked separately).

Each of the customer's program enrollment periods are displayed in the list below the outcome fields on this page. If the selected enrollment is a parent enrollment, the necessary fields for the child enrollments will be displayed and enterable. Child enrollments can not be updated directly.

### Viewing the Outcomes Page

To access the Outcomes page:

1. Click on the **Outcomes** tab. The Outcomes page ([Figure 6-21](#)) will appear.

Agency Info | Achievement Objectives | Services | Service History | Enrollments | **Outcomes** | Comments | Audit

**Employment**

O\*Net Title  O\*Net Titles

Recalled By Layoff Employer

Employment Training Related

Employment Non-Traditional

Employed in Federal Contractor Job

**Employed in Quarter after Exit**

	Employed after Exit	Determination Method
1st Quarter	<input type="text"/>	<input type="text"/>
2nd Quarter	<input type="text"/>	<input type="text"/>
3rd Quarter	<input type="text"/>	<input type="text"/>
4th Quarter	<input type="text"/>	<input type="text"/>
5th Quarter	<input type="text"/>	<input type="text"/>

**Education & Training**

Education Level at Exit

Entered Advanced Training

Entered Post-Secondary

Attained Credential

Type of Credential

Date Attained

	Program Type	Enr. Date	Enrollment Office	Exit Date	Exit Office
<input type="checkbox"/>	WIA	03/13/2000	Buffalo		
<input type="checkbox"/>	Trade Act	04/16/2000	Buffalo	06/25/2005	Buffalo
<input checked="" type="checkbox"/>	Common Measures	03/13/2000	Buffalo		
<input type="checkbox"/>	Labor Exchange	12/11/2004	Elmira	12/14/2004	Buffalo
<input type="checkbox"/>	Labor Exchange	04/01/2005	Buffalo	06/17/2005	Buffalo

Print List

*To enter outcome information for a program enrollment, select the desired registration period from this list and enter outcome data in the fields above.*

Figure 6-21. The Outcomes Page of the Services Window.

## Enrollments

The Enrollments page of the Services window is used to manage exits for a customer's various program enrollments (e.g., Common Measures, WIA, Trade Act, Welfare to Work, and other state-specific funding programs). Each of the customer's program enrollment periods are displayed in the list at the bottom of this page. Clicking on a program enrollment entry in this list will display its detail information in the **Enrollment Info** and **Exit Info** fields above the list.

Common Measures, WIA and Trade Act enrollments are initiated by using the Services page to allocate WIA or Trade Act funds, respectively, to fund a customer's services. Labor Exchange enrollments are initiated by adding Labor Exchange Activities in the Customer Module.

### Viewing the Enrollments Page

To access the Enrollments page:

1. Click on the Enrollments tab. The Enrollments page ([Figure 6-19](#)) will appear.

Agency Info | Achievement Objectives | Services | Service History | **Enrollments** | Outcomes | Comments | Audit

**Enrollment Info**

Program Type: Common Measures

Enrollment Date: 12/13/2000 Enrolled in Education:

Enrolling Service Name: Help Using Self-Service Systems Place

Enrolling Service Type: Utilizing Resource Rooms

Enrolling Admin: Moore, Ed

Enrolling Office: Buffalo

Staff Assisted: Yes

Employment Status: Not Employed

**Holds**

	Start Date	End Date	Reason
<input type="checkbox"/>			

Add Edit Delete

**Exit Info**

Exit Date:

Exit Reason:

3rd Qtr Exclusion:

Exit Admin:

Exit Office:

Transaction Date:

Transaction Admin:

Transaction Office:

	Program Type	Enr. Date	Enrollment Office	Exit Date	Exit Office
<input type="checkbox"/>	WIA	04/02/2007	Buffalo		
<input type="checkbox"/>	Trade Act	12/13/2000	Buffalo		
<input checked="" type="checkbox"/>	Common Measures	12/13/2000	Buffalo		
<input type="checkbox"/>	Labor Exchange	03/29/2007	Buffalo		

Print List    Enrollment History

Save    Customer Detail    Comp. Access    Post a Note    Check Labor Market Information

*Customer program enrollments are listed here. Click on an entry to display its detail information in the fields above.*

Figure 6-19. The Enrollments Page of the Services Window

## Service History

The Service History page of the Services window provides a list of services that have been provided to the customer, and allows this list to be printed if desired. Detailed information can be viewed for each service using the **Detail** button. The Service History page lists the following types of services:

- Job Match/Referral
- 9002 Activities
- Provider Services
- InterAgency Referrals
- Labor Exchange Enrollment/Exit
- Trade Act Enrollment/Exit
- WIA Enrollment/Exit

### Viewing the Service History Page

To access the Service History page:

1. Click on the **Service History** tab. The Service History page (Figure 6-8) will appear.

Service	Date	Staff	Agency	Office
<input type="checkbox"/> Referred to Job FT Short-Term (1 - 3 Days)	06/15/2006	Workforce Professor	DEPARTMENT OF LABO	Buffalo
<input type="checkbox"/> New Job Seeker - Staff Assisted	05/01/2002	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> Assessment Interview, Initial Assessment	05/27/2005	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> Labor Exchange Registration	05/27/2005	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> Career Guidance	05/27/2005	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> Individual Employment Plan	05/27/2005	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> Match	06/15/2006	Workforce Professor	DEPARTMENT OF LABO	Buffalo
<input checked="" type="checkbox"/> PRSC3 Service#2 Name	05/01/2005	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> PRSC3 Service#2 Name	05/01/2005	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> PRSC3 Service#2 Name		Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> PREC4 Service#b Name	05/15/2005	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> Inter-Agency Referral	06/15/2006	Workforce Professor	DEPARTMENT OF LABO	Albany
<input type="checkbox"/> WIA Enrollment	09/01/2003	Tester2 Tester2	DEPARTMENT OF LABO	Albany
<input type="checkbox"/> Labor Exchange Enrollment	06/15/2006	Workforce Professor	DEPARTMENT OF LABO	Buffalo
<input type="checkbox"/> Labor Exchange Enrollment	09/01/2003	Charles Buchanan	DEPARTMENT OF LABO	Elmira
<input type="checkbox"/> Common Measures Enrollment	09/01/2003	Tester2 Tester2	DEPARTMENT OF LABO	Albany
<input type="checkbox"/> Common Measures Enrollment	06/15/2006	Workforce Professor	DEPARTMENT OF LABO	Buffalo

To view detail information about a service, click on the desired list entry, and then click the **Detail** button.

Buttons: Save, Customer Detail, Comp Assess, Post a Note, Check Labor Market Information

Figure 6-18. The Service History Page of the Services Window

The Service History list displays the following information about each service:

**Service**

This column displays the name of the service.

**Date**

This column displays the date (in mm/dd/yyyy format) on which the service was assigned to the customer.

**Staff**

This column displays the name of the staff person who assigned the service.

**Agency**

This column displays the name of the agency through which the service was assigned.

**Office**

This column displays the office in which the service was assigned.



*If you have recently added or changed customer information using the Services module, that activity may not immediately be displayed on the Service History page. Exit and re-enter the Services module to view the most recent information on the Service History page.*

## Customer List Participation

The **Customer List Participation** section of the Additional Info page provides a method for adding the displayed customer record to a customer list. This function can also be performed using the **Assign to List** button on the Customer Search window; see [Adding One or More Customers to a List](#) on page 2-44 of **Chapter 2, AOSOS Customer Search**. You can also remove customer records from lists using this functionality.

The **Customer List Participation** box displays list names for each list to which the currently displayed customer belongs.

**To add the currently displayed customer record to a customer list:**

1. Click the **Assign to List** button beneath the **Customer List Participation** box. The List Management window ([Figure 3-14](#)) will appear.

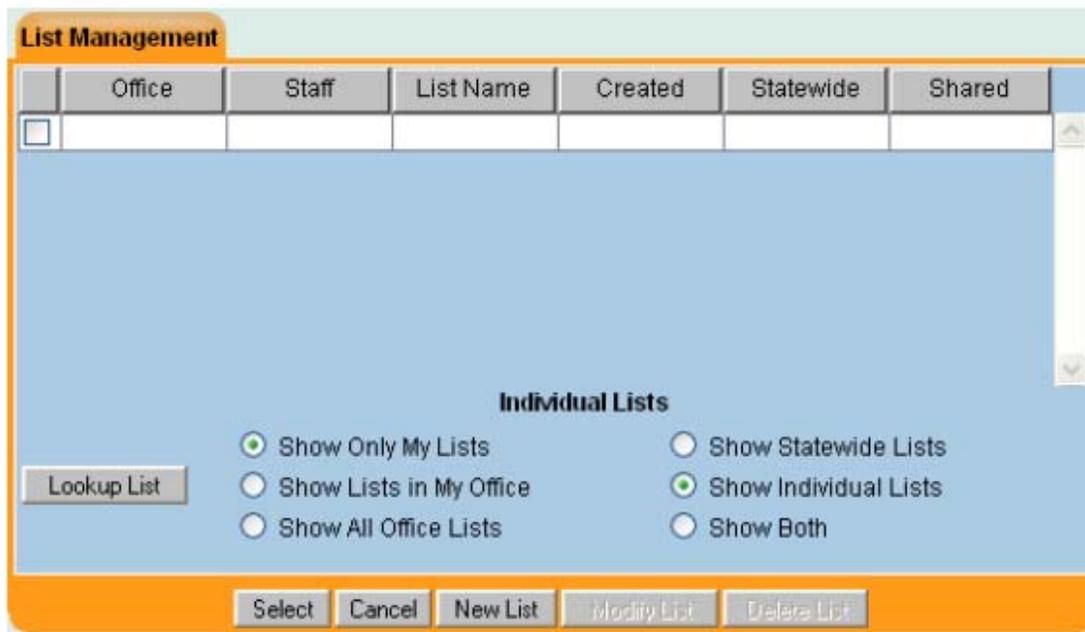


Figure 3-14. The List Management Window

The **List Management** window features two groups of radio buttons below the list box which allow you to define which lists will be displayed. You must select a single radio button option from each group of options.

The leftmost group of radio buttons includes:

- **Show Only My Lists** - Selecting this radio button will display customer lists which are owned/administered only by the staff person that is currently logged in.
- **Show Lists in My Office** - Selecting this radio button will display customer lists which are owned/administered by any staff person that is in the same office as the person that is currently logged in.
- **Show All Office Lists** - Selecting this radio button will display customer lists which are owned/administered by any staff person in any office in the entire state.

The rightmost group of radio buttons applies to the **Statewide** flag, which can be selected for a list. This group of radio buttons includes:

- **Show Statewide Lists** - Selecting this radio button will display customer lists for which the **Statewide** flag has been selected.
- **Show Individual Lists** - Selecting this radio button will display customer lists for which the **Statewide** flag *has not* been selected.
- **Show Both** - Selecting this radio button will display all customer lists, regardless of the status of the **Statewide** flag.

2. Select a radio button option from each group of radio buttons on this page.

3. Click the **Lookup List** button. The corresponding saved list entries will appear in the list box above the radio buttons.
4. Select a list by clicking on the desired entry in the list box. The selected entry will be highlighted to indicate that it is selected.
5. Click the **Select** button at the bottom of the List Management window. The customer record will be added to the selected list.

Once a customer record has been added to a list, the list entry will appear in the **Customer List Participation** box on the Additional Info page for that customer.

The List Management window can also be used to create, modify, and delete customer lists. For more information, see **Chapter 8, AOSOS List Management**.

**To remove a customer record from a list:**

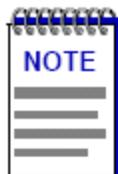
1. In the **Customer List Participation** box, click on the entry for the list from which the customer will be deleted. The list entry will be highlighted to indicate that it is selected.
2. Click the **Remove** button beneath the **Customer List Participation** box.
3. A confirmation window will appear, asking you to confirm the customer's removal from the list. Click **OK** to confirm and perform the removal. To cancel the removal, click **Cancel**.

Once a customer record has been removed from a list, the list entry will no longer appear in the **Customer List Participation** box on the Additional Info page for that customer.

## Adding One or More Employers to a List

The **Assign To List** button at the bottom of the Employer Search window launches the List Management window (Figure 2-15) which allows you to add one or more of your employer search results to an existing list.

For more information on the creation and use of employer lists, see **Chapter 8, AOSOS List Management**.



*After performing an Employer Search, the **Assign to List** button will initially be grayed-out. It will not become active until you display the employer contact information using the **Show/Hide Contacts** button. See [Showing/Hiding Employer Contacts](#) on [page 2-25](#) for complete instructions on displaying employer contact information in your list of search results.*

To add one or more employers to a list:

1. Perform an employer search as detailed in [Performing an Employer Search](#) on [page 2-4](#).
2. Use the **Show Contacts** button to display the employer contact information for your search results as instructed in [Showing/Hiding Employer Contacts](#) on [page 2-25](#). Once you have displayed the employer contact information, the **Assign to List** button will become active.
3. Select one or more search result entries to be added to a list, as follows:
  - a. To select a single search result, click on its entry in the search results list. The entry will be highlighted to indicate that it is selected.
  - b. To select a sequential group of search results from the search results list, click to highlight the first record in the desired group, hold down the **Shift** key, and click on the last record in the desired group. All records in the selected range will be highlighted.
  - c. To select a non-sequential group of search results from the search results list, hold down the **Alt** key, and click to highlight each record in the desired group.
4. Click the **Assign to List** button. The List Management window (Figure 2-15) will appear.

Quick Search General Info Additional Info **List Search** Custom

	Office	Staff	List Name	Created	Statewide	Shared
<input type="checkbox"/>	Oswego	what is a tester, tester	New Cap Dist Employers	05/25/2000	No	No
<input type="checkbox"/>	Oswego	what is a tester, tester	Modify and dont save	05/02/2000	No	No
<input type="checkbox"/>	Oswego	what is a tester, tester	james family store	06/06/2000	No	No
<input type="checkbox"/>	Saratoga Springs	Tester2, Tester2	Delaware Co. Employers	05/07/2000	No	No
<input checked="" type="checkbox"/>	Buffalo	Tester3, Tester3	jims list	05/07/2000	No	No
<input type="checkbox"/>	Oswego	what is a tester, tester	delaware	06/07/2000	No	No

Individual Lists

Show Only My Lists  
 Show Lists in My Office  
 Show All Office Lists

Show Statewide Lists  
 Show Individual Lists  
 Show Both

	Employer	Staff Assigned	Office	SEIN	City	Created	Age
<input checked="" type="checkbox"/>	Bojangles Chicken	Tester2, Tester2	Albany	-	Guilderland	06/08/2000	2533
<input type="checkbox"/>	Quick Copies	Smith, John	Carson City Loc		Vestal	05/23/2000	2549
<input type="checkbox"/>	Savings Bank of Utica	what is a tester, tester	Oswego		Utica	06/29/2000	2512

25 Search Clear Detail Print List Cancelled Assign to List Show Contacts New

Figure 2-15. The List Management Window

The **List Management** window features two groups of radio buttons below the list box which allow you to define which lists will be displayed. You must select a single radio button option from each group of options.

The leftmost group of radio buttons includes:

- **Show Only My Lists** - Selecting this radio button will display employer lists which are owned/administered only by the staff person that is currently logged in.
- **Show Lists in My Office** - Selecting this radio button will display employer lists which are owned/administered by any staff person that is in the same office as the person that is currently logged in.
- **Show All Office Lists** - Selecting this radio button will display employer lists which are owned/administered by any staff person in any office in the entire state.

The rightmost group of radio buttons applies to the **Statewide** flag, which can be selected for a list. This group of radio buttons includes:

- **Show Statewide Lists** - Selecting this radio button will display employer lists for which the **Statewide** flag has been selected.
- **Show Individual Lists** - Selecting this radio button will display employer lists for which the **Statewide** flag *has not* been selected.
- **Show Both** - Selecting this radio button will display all employer lists, regardless of the status of the **Statewide** flag.

5. Select a radio button option from each group of radio buttons on this page.
6. Click the **Lookup List** button. The corresponding saved list entries will appear in the list box above the radio buttons.
7. Select a list by clicking on the desired entry in the list box. The selected entry will be highlighted to indicate that it is selected.
8. Click the **Select** button at the bottom of the List Management window. The selected employer record entries will be added to the selected list.

The List Management window can also be used to create, modify, and delete employer lists. For more information, see **Chapter 8, AOSOS List Management**.

## Adding One or More Job Orders to a List

The **Assign To List** button at the bottom of the Job Order Search window launches the List Management window (Figure 5-16) which allows you to add one or more of your job order search results to an existing job order list.

For more information on the creation and use of job order lists, see **Chapter 8, AOSOS List Management**.

To add one or more job orders to a list:

1. Perform a job order search as detailed in **Performing a Job Order Search** on page 5-5.
2. Select one or more search result entries to be added to a list, as follows:
  - a. To select a single search result, click on its entry in the search results list. The entry will be highlighted to indicate that it is selected.
  - b. To select a sequential group of search results from the search results list, click to highlight the first job order in the desired group, hold down the **Shift** key, and click on the last job order in the desired group. All job orders in the selected range will be highlighted.
  - c. To select a non-sequential group of search results from the search results list, hold down the **Alt** key, and click to highlight each job order in the desired group.

Once you have selected one or more job orders from the search result list, the Assign to List button will become active.

3. Click the **Assign to List** button. The List Management window (Figure 5-16) will appear.

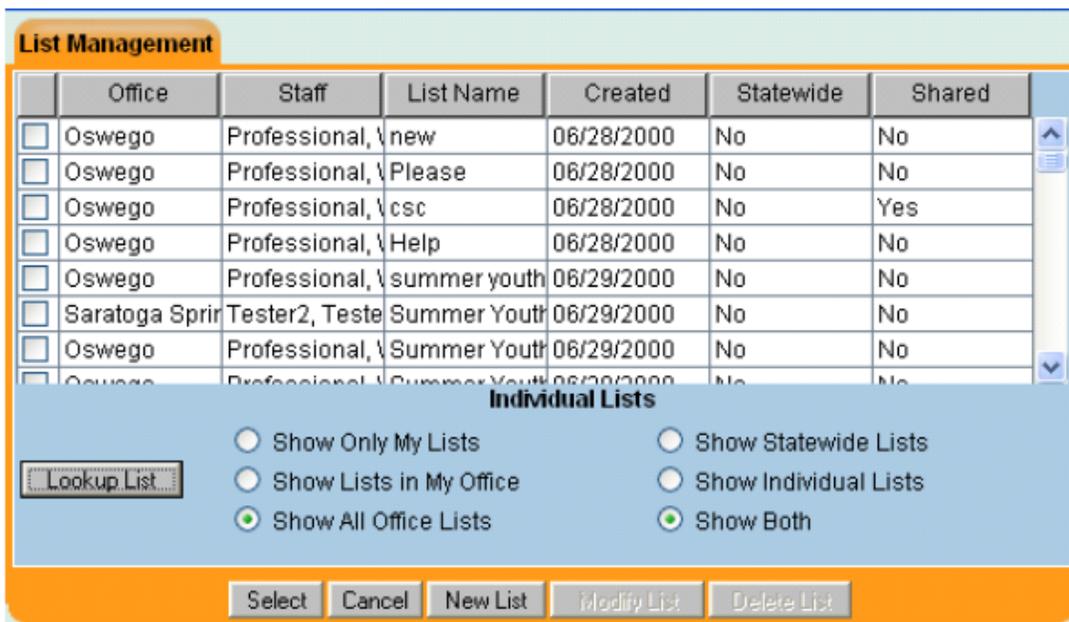


Figure 5-16. The List Management Window

The **List Management** window features two groups of radio buttons below the list box which allow you to define which lists will be displayed. You must select a single radio button option from each group of options.

The leftmost group of radio buttons includes:

- **Show Only My Lists** - Selecting this radio button will display job order lists which are owned/administered only by the staff person that is currently logged in.
- **Show Lists in My Office** - Selecting this radio button will display job order lists which are owned/administered by any staff person that is in the same office as the person that is currently logged in.
- **Show All Office Lists** - Selecting this radio button will display job order lists which are owned/administered by any staff person in any office in the entire state.

The rightmost group of radio buttons applies to the **Statewide** flag, which can be selected for a list. This group of radio buttons includes:

- **Show Statewide Lists** - Selecting this radio button will display job order lists for which the **Statewide** flag has been selected.
- **Show Individual Lists** - Selecting this radio button will display job order lists for which the **Statewide** flag *has not* been selected.
- **Show Both** - Selecting this radio button will display all job order lists, regardless of the status of the **Statewide** flag.

4. Select a radio button option from each group of radio buttons on this page.

5. Click the **Lookup List** button. The corresponding saved list entries will appear in the list box above the radio buttons.
6. Select a list by clicking on the desired entry in the list box. The selected entry will be highlighted to indicate that it is selected.
7. Click the **Select** button at the bottom of the List Management window. The selected job order entries will be added to the selected list.

The List Management window can also be used to create, modify, and delete job order lists. For more information, see **Chapter 8, AOSOS List Management**.

### Desired Employers

The **Desired Employers** list box and function buttons are used to select a customer's desired employers by selecting from a list of employer names.

The Desired Employers list, from which these employer names are selected, is populated with employers that have an agreement with the state/local office to conduct candidate screening and selection on the employer's behalf. Employers are added to this list when the **Desired Employers List** checkbox is selected on the **General Info** page of their record in the AOSOS Employer Detail window (See **Chapter 3** of the *AOSOS Employer Services User's Guide* for details).

All selected employer names will be displayed in the **Desired Employers** list box. Employer names can be added and deleted from this list box.



*The employer names available for addition are obtained in a transaction that is controlled by the Employer Query security process. In order to use this feature, the user's group must be granted access to the Employer Query process using the AOSOS Admin application (see the **AOSOS Admin Guide** for details). If the user does not have Employer Query permissions, the **Add an Employer** button will be grayed out and unavailable for use. Previously added employer names can still be deleted from the list.*

*Also, if the Desired Employers list contains more than 500 employer names, only the first 500 will be available for selection from the **Desired Employers** list box. If this is the case, a note will be displayed on the screen next to the list box indicating the condition.*

To add a desired employer for a customer:

1. Click the **Add an Employer** button. The Desired Employers pop-up window (**Figure 3-20**) will appear, listing all AOSOS Desired Employers.



Figure 3-20. The Desired Employers Pop-Up Window

2. Click on a desired employer entry within the list box. The entry will be highlighted to indicate that it is selected.
3. Click **Add**. The Desired Employers pop-up window will disappear, returning you to the Objective page. The selected employer will be listed in the **Desired Employers** list box. To cancel the operation, click **Cancel**.
4. To add more desired employers for the customer, repeat **Steps 1-3** for each desired employer.

To delete an employer entry:

1. In the **Desired Employers** list box, click on the list entry to be deleted. The selected entry will be highlighted to indicate its selection.
2. Click the **Delete Selection** button. A confirmation window will appear, asking you to confirm the employer's deletion. Click **OK** to confirm and perform the deletion, and the selected employer will be removed from the list box. To cancel the operation, click **Cancel**.

## Adding an Employer to the Desired Employer List

### **Desired Employers List**

Employers that have an agreement with the state/local office to conduct candidate screening and selection on the employer's behalf should be added to the Desired Employers List. This list can be used in the Customer module to allow customers to select one or more desired employers. The **Desired Employers List** checkbox is used to indicate whether the employer is on the state's Desired Employers list. To use the **Desired Employers List** checkbox:

1. To add the employer record to the Desired Employers list, click on the checkbox. A check mark will appear in the checkbox to indicate its selection. To deselect this option, click on the checkbox again, and the check mark will disappear.

## Employer Records

We need to correct our database as much as possible by July 1, 2007 when E3 is implemented.

The new employer portal for Kentucky, E3, will use FEIN (Federal Employer Identification Numbers) for processing and verifying employers. It is now mandatory that you add this field to all new EKOS employer records. Per management, you will also need to add this to existing records as you work with them between now and July. You will need to ask the employer for this number.

It is also available on UI Program 42 but this search can be tricky. Example: The KY Fried Chicken in Inez is listed as Angela's Food on UI 42. Angela's Food is the legal name. No where on the record do you see any reference to KY Fried Chicken. (If you search by Kentucky Fried Chicken in UI 42, you will get a large number of FEIN numbers for various franchises.)

By asking for the FEIN, you will also know when it is necessary to add a new employer record in EKOS or if you just need to add another contact to the existing record. If the FEIN is already used for a corporation and they are simply adding another location, you just add a new contact page. EKOS will allow 300 employer contacts per employer record.

Do a search in EKOS for KY Fried Chicken; then search for KFC; then search for Kentucky Fried Chicken. You will see the many ways this record has been entered.

If several KFC's are owned by the same franchise, they should have one employer record. This information is needed for EEO reports provided from EKOS to employers for EEO audits.

If they currently have 2 records, inactivate the record with no job orders or activities. If both have open job orders attached, inactivate the one with the oldest job order. The system will allow you to inactivate an employer record with an open order. You will also need to manually add the employer contacts from the "inactive" record to the "active" record if they do not already exist on that record. Place a post a note on the employer record's comment section stating why it is being inactivated.

When entering a new record for an independent contractor (as defined by UI auditors), we will use a pseudo number ex: 99-9701161

System = 3 9's

Your 2 digit office number

Contractor's month and year of birth

(This is the same process we use for customer pseudo numbers)

FEIN is not required for independent contractors. Always put a Post A Note that the employer stated they are not required to have a FEIN.

## E3 Website Overview

[www.e3.ky.gov](http://www.e3.ky.gov)

To View the E3 Training Package

Click this Link <http://my.edcabinet.ky.gov/ekosinfo/e3TrainingPackage022409.pdf>

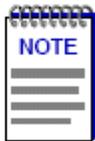
**\*\*\* Never Delete an e3 Contact in the Employer Record \*\*\***

**\*\*\* You Cannot manually enter a e3 contact in the Employer Record \*\*\***

## Job Order Match

### Performing Matches and Referrals

Using the search capabilities of the AOSOS Customer and Job Order modules, you can search for matching customers and job orders using the AOSOS Match mode functions. Once one or more matching records have been found, customers can be referred to an employer using the application's Refer functionality.



*Once a customer record is matched or referred to a job order, it will never again appear as a search result in a Match search using the same search criteria.*

## Matches

Customer and Job Order Matches can be launched from either the Job Order or Customer modules.

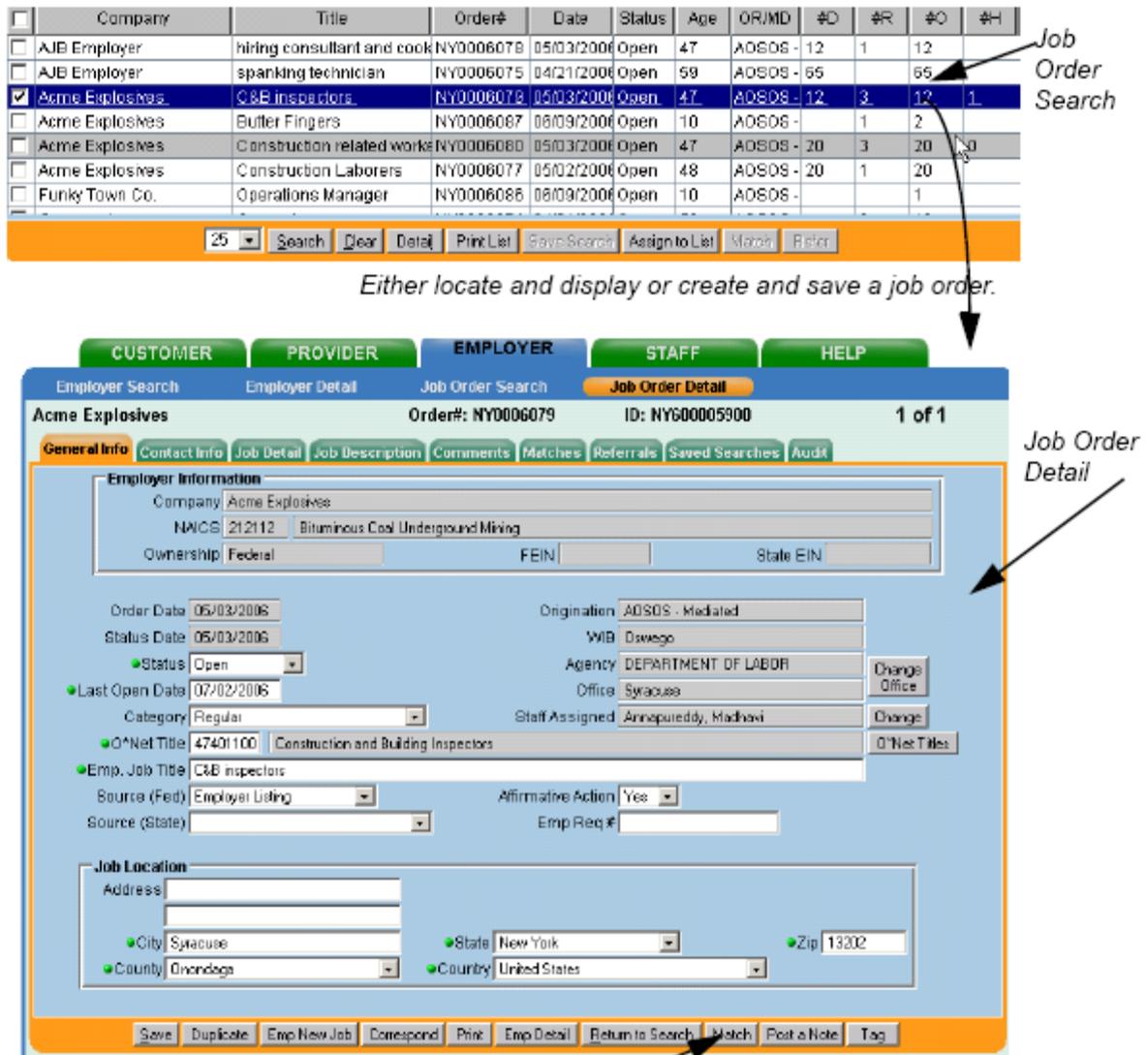
### Performing Matches from the Job Order Module

1. Using the Job Order Search window, locate the desired job order for the Match operation (see Chapter 5, [AOSOS Job Order Search](#) for instructions) and display it in the Job Order Detail window (see [Figure 7-1](#)).

OR

Create and save a new job order (see Chapter 6, [AOSOS Job Order Detail](#) for instructions) using the Job Order Detail window (see [Figure 7-1](#)).

- In the Job Order Detail window, click the **Match** button (see Figure 7-1). The Customer Search window will appear. Several Customer Search window fields will be pre-populated with criteria from the job order (see Figure 7-2).



Click the **Match** button. The Customer Search window will appear (see Figure 7-2). Several Customer Search fields will be pre-populated with criteria from the Job Order.

Figure 7-1.

Customer Search window, with search criteria from the job order.

Customer Search window showing search criteria and results. The search criteria include Education and Driver's License Required. The results table lists seekers with their SSN, Vet status, Status, Name, and Objective.

SSN	Vet	Status	Seeker Name	Objective
117-65-1887	No	Active	Harrington, Stefania	to find employment as programmer
087-61-5889	No	Active	Harrison, Michael	to find full time work
073-38-0027	No	Active	Hawthorne, Regina	EO 1
800-32-5555	No	Active	hayes, willy m	To play center field for a major league baseball team
555-55-5555	No	Active	Hog, Irma	find an office job; secretary
530-70-9439	No	Active	Hogan, Sharon D	To secure a challenging position in which to utilize my skills
073-37-0096	No	Active	Hollister, Jenny	EO 1
998-77-4441	No	Active	Hoss, Boss	To use my skills in a civilian capacity

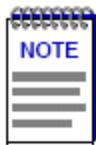
Use the Customer Search window to search for matching customers for the job order.

Figure 7-2.

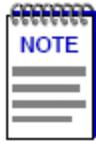
3. If necessary, enter, change, and/or delete the search criteria on the various tabbed pages of the Customer Search window (see Chapter 2, AOSOS Customer Search in the AOSOS Customer Services User's Guide, for details).



*If you click the Customer Search window's Clear button while performing a Match operation, Match mode will be cancelled. If you wish to remove or change search criteria for your Match operation, you should manually alter the necessary fields. Do not use the Clear button to clear the fields.*



*You cannot use the **Customer SSN** and **Customer ID** fields on the **Customer Search** window **Quick Search** page while in **Match** mode.*



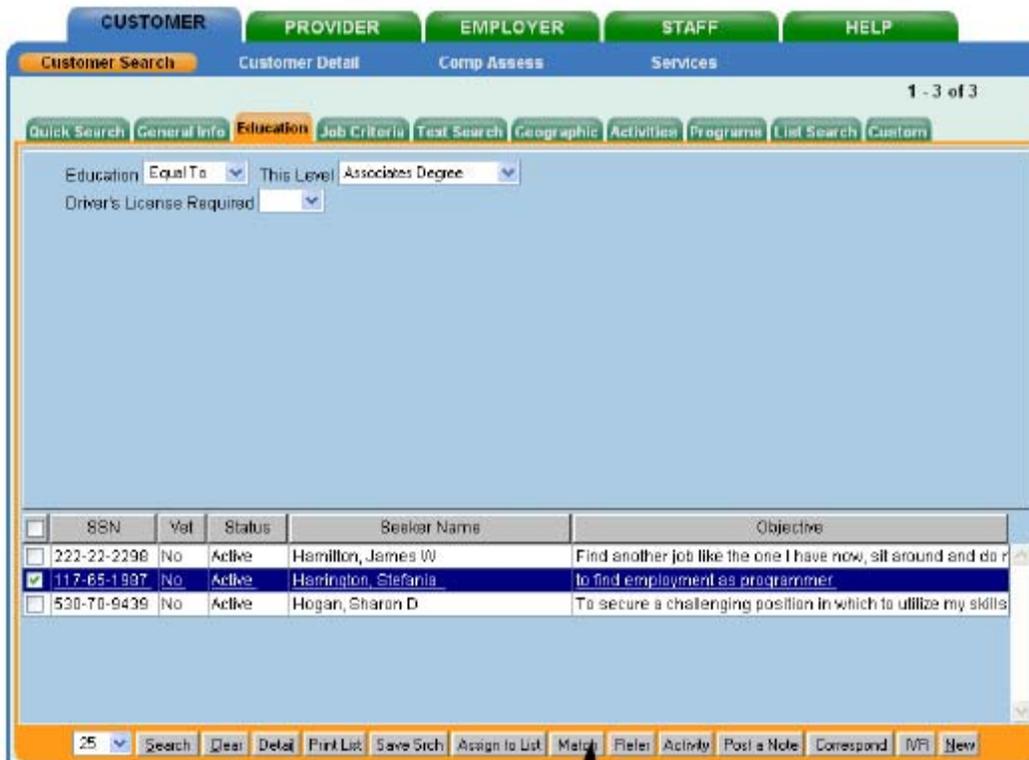
*The **Customer Search Work Week** conventions on the **Job Criteria** page operate as follows during a **Match** operation:*

*If the **Match** operation is initiated for a **Full Time** job, the customer search will return customer records that specify a preference for **Full Time** or **Any** employment.*

*If the **Match** operation is initiated for a **Part Time** job, the customer search will return customer records that specify a preference for **Part Time** or **Any** employment.*

*See **Chapter 2, AOSOS Customer Search** in the **AOSOS Customer Services User's Guide**, for details on the **Customer Search** window.*

4. To limit the size of your result set, click on the arrow button (▼) in the **Search Limit** field, and select the desired result set size (**25**, **50**, or **100**) from the drop-down list.
5. To activate the search, click the **Search** button. Your search results will appear in the **Search Results** list below the **Customer Search** window fields (see [Figure 7-3](#)).
  - a. At this point in the **Match** operation, if your customer search returns any search results, the **Save Search** button will become active. This button allows you to save the search parameters used in this **Match** operation so that the search can be performed again later. All saved searches will be listed on the **Saved Searches** page of the **Job Order Detail** window for later use. See [Saved Searches](#), on [page 7-13](#), for details on **Saved Searches**.
6. To match one or more customers to the job order, select the desired list entries in the **Search Results** list and click the **Match** button. The customer record(s) will be listed on the **Matches** page of the job order's **Detail** window ([Figure 7-4](#)). A **Match** activity will also appear on the **Customer Detail Activities** page and the **Service History** page (in the **Services** module) for each matched customer record. (see [Figure 7-5](#)).



To match customers from this window, highlight the customer entries and click the **Match** button.

Figure 7-3.

- a. To review customer records before performing any matches, highlight one or more of your search results and click the **Detail** button. The Customer Detail window will appear.
- b. Review the customer record as necessary.
- c. If you decide to match a customer record after reviewing it in the Customer Detail window, click the **Tag** button at the bottom of the window. The button's label will change to **UnTag**. To deselect the record, click the **UnTag** button.
- d. Click the **Return to Srch** button. The Customer Detail window will disappear, returning you to the Customer Search window. You will still be in **Match** mode. If you tagged any customer records in their Customer Detail windows, their search result list entries will be highlighted.

- e. Click the **Match** button. The selected customer record(s) will be listed on the **Matches** page of the job order's Detail window (Figure 7-4). A Match activity will also appear on the Customer Detail **Activities** page and the **Service History** page (in the Services module) for each matched customer record. (see Figure 7-5).

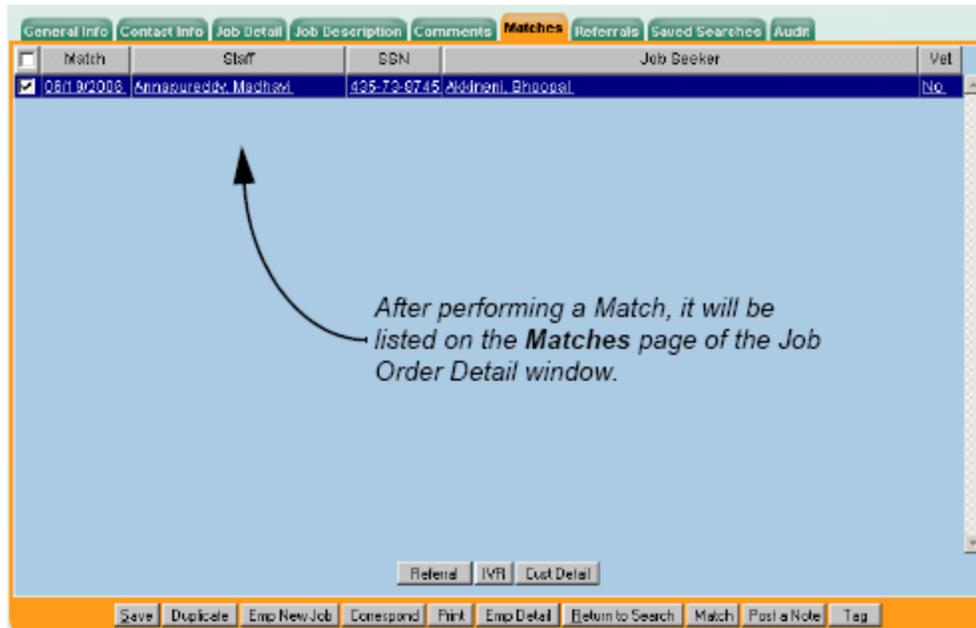


Figure 7-4.

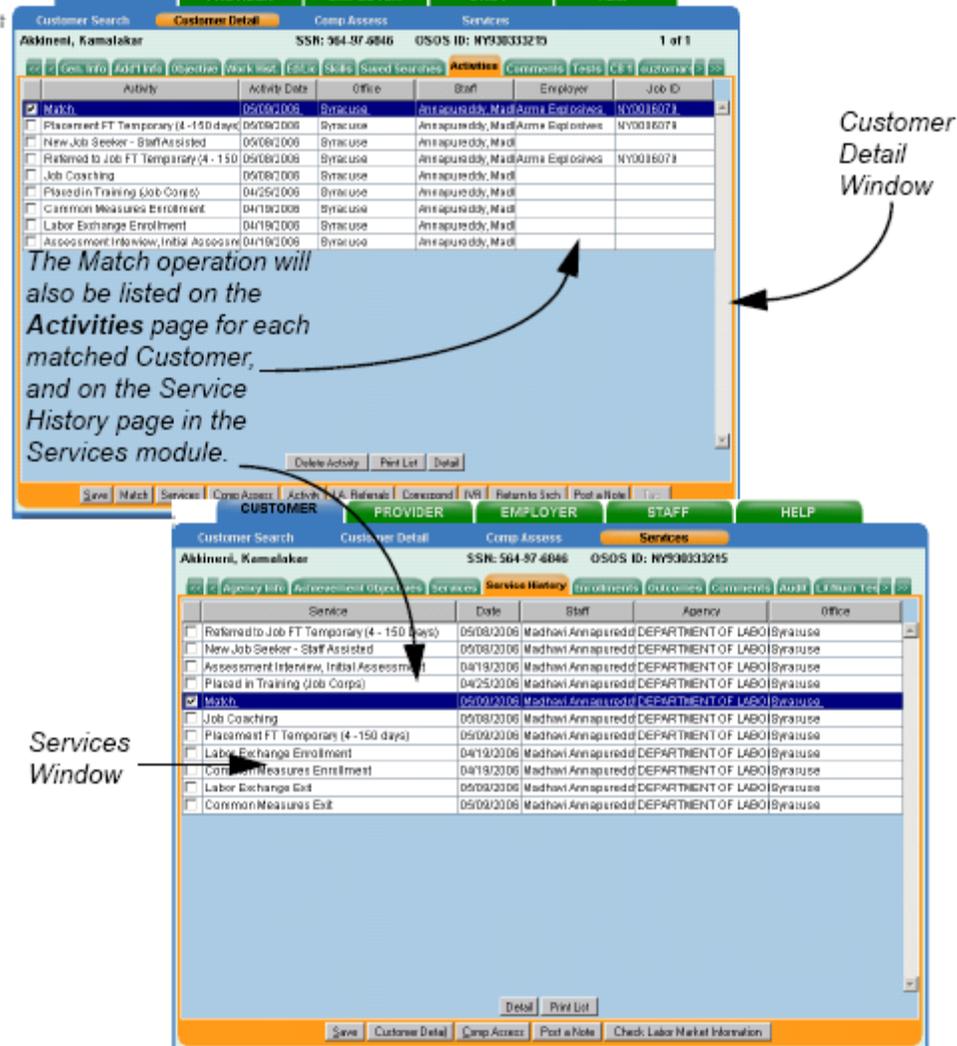


Figure 7-5.

## Referrals

### Performing Referrals from the Job Order Detail Window

After a customer has been matched to a job order, the customer will be listed on the **Matches** page of the Job Order Detail window. From here, a customer can be Referred to the employer for the job. To do so:

1. On the **Matches** page of the Job Order Detail window, click on the list entry for the customer to be referred. The entry will be highlighted to indicate that it is selected (see [Figure 7-13](#)).
2. Click the **Referral** button. The selected customer will be listed on the **Referrals** page of the Job Order Detail window ([Figure 7-15](#)). A Refer service will also appear on the **Activities** page of the customer record and the **Service History** page (in the Services module) for the customer (see [Figure 7-10](#)).

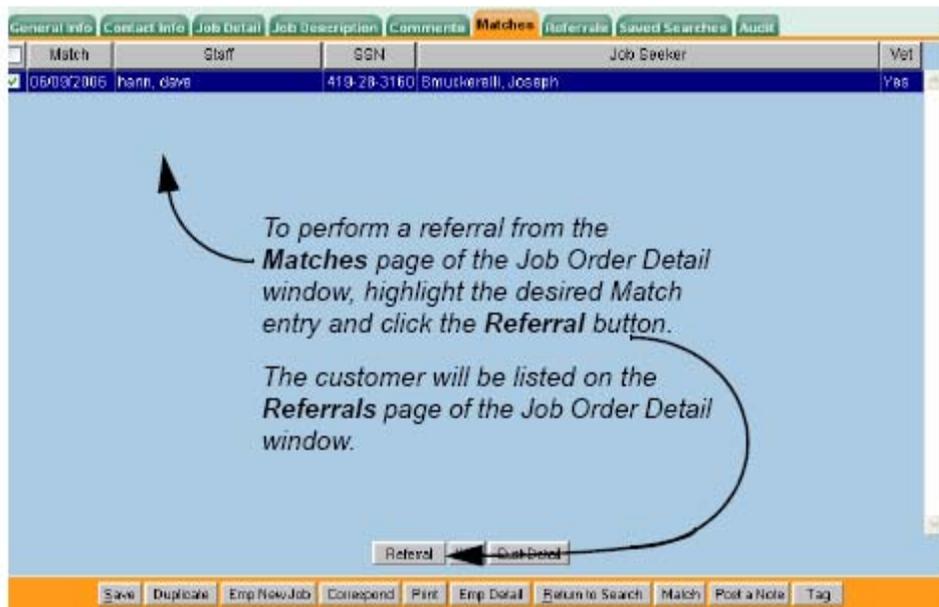


Figure 7-13.

### Performing Referrals from a Search Window

During a Match operation, if you find a perfect Customer - Job match, you can perform a referral directly from the Customer or Job Order Search windows. To do so:

1. Highlight the desired list entries and click the **Refer** button (see [Figure 7-14](#)). The customer(s) will be listed on the **Referrals** page of each involved job order's Detail window ([Figure 7-15](#)). A Refer service will also appear on the **Activities** page of the customer record and the **Service History** page (in the Services module) for the customer (see [Figure 7-10](#)).

General Info Job Detail List Search Custom

Full Time   
 Part Time   
 Regular   
 Seasonal   
 Temporary   
 Short Term   
 Hours Per Week

First Shift   
 Second Shift   
 Third Shift   
 Rotating Shift   
 Split Shift   
 Shift Varies

Starting Pay  
 Minimum   
 Maximum   
 Unit

**Benefits**  
 Health Insurance  
 Dental Insurance  
 Vacation  
 Sick Leave  
 Holidays  
 Retirement/Pension Plan  
 Clothing/Uniform Allowance  
 Child Care

Education Required   
 Experience Required  Years  Months  
 Public Transportation

<input type="checkbox"/>	Company	Title	Order#	Date	Status	Age	ORMD	#D	#R	#O	#H
<input type="checkbox"/>	AJB Employer	spanking technician	NY0006075	04/21/2006	Open	59	ACBOS - 66			65	
<input type="checkbox"/>	AJB Employer	hiring consultant and cook	NY0006078	05/03/2006	Open	47	ACBOS - 12	1		12	
<input type="checkbox"/>	Acme Explosives	Construction Laborers	NY0006077	05/02/2006	Open	48	ACBOS - 20	1		20	
<input type="checkbox"/>	Acme Explosives	C&B Inspectors	NY0006079	05/03/2006	Open	47	ACBOS - 12	3		12	1
<input checked="" type="checkbox"/>	Genesis Inc	Front desk	NY0006076	04/21/2006	Open	59	ACBOS - 15			15	
<input type="checkbox"/>	Thirteen Thirty Seven	Senior Software Engineer	NY0007089	06/15/2006	Open	4	ACBOS -		1	2	
<input type="checkbox"/>	Thirteen Thirty Seven	Asc. Software engineer	NY0006080	06/13/2006	Open	6	ACBOS -		1	1	

25  Search  Clear  Detail  Print List  Save Search  Assign to List  Match  Refer

To refer customers to job orders from a Search window in Match mode, highlight the list entries and click the Refer button.

Figure 7-14.

## Manually Adding a Referral for a Job

To manually refer a customer for a job order:

1. In the Job Order Detail window, click the Referrals tab. The Referrals page (Figure 7-15) will appear.

Acme Explosives      Order#: NY0006080      ID: NYG00005900      1 of 1

<input type="checkbox"/>	SSN	Name	Vet	Date	Staff	Ref Meth	Result	Pay At Hire	Unit
<input type="checkbox"/>	153-74-8845	Akkineni, Rajendra	No	05/03/2006	Annapureddy, M	Staff Matching			
<input checked="" type="checkbox"/>	265-67-6787	Akkineni, Harry	No	06/19/2006	Annapureddy, M	Staff Matching			
<input type="checkbox"/>	032-54-6876	Akkineni, Harish	Yes	05/18/2006	Annapureddy, M	Staff Matching			
<input type="checkbox"/>	132-48-4887	Akkineni, Raghu	No	05/23/2006	Annapureddy, M	Staff Matching			

Buttons: Add Referral, Post Result, Delete Referral, Print List, Cust Detail, Employer Letter w/ Resume, Customer Letter w/ Job Order, Follow-Up w/ Employer, Follow-Up w/ Customer, Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Match, Post a Note, Top

Figure 7-15. The Referrals Page of the Job Order Detail Window

2. Click the **Add Referral** button. The Add Job Referral pop-up window (Figure 7-16) will appear.

**Add a Job Referral**

SSN       Lookup Seeker

Name

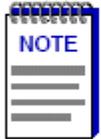
Date

Save      Cancel

Figure 7-16. The Add Job Referral Pop-Up Window

3. In the **SSN** field, enter the valid Social Security Number for the customer to be referred.

4. Click the **Lookup Seeker** button. AOSOS will retrieve the customer's name and display it in the **Name** field. If the Social Security Number is invalid, or does not exist in the system, an error message will result.
5. In the **Date** field, enter the date on which the referral was performed (in **mmddyyyy** format). The value will be formatted by the system (i.e., separators, such as slashes, are automatically inserted), so enter only numeric characters.



*Dates beyond the current system date are not allowed. If you attempt to add a referral with a date that exceeds the current system date, an error message will result.*

6. To complete the referral, click the **Save** button. The Add Job Referral window will disappear, and the new referral entry will be listed on the **Referrals** page (its default referral method will be listed as **Staff Matching**). A Refer service will also appear on the **Activities** page of the customer record and the **Service History** page (in the Services module) for the customer (see [Figure 7-10](#)).

## Posting a Referral Result

To post result information for a referral:

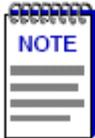
1. On the **Referrals** page of the Job Order Detail window, click on the list entry for the desired referral. The entry will be highlighted to indicate that it is selected.
2. Click the **Post Result** button. The Post Result pop-up window ([Figure 7-17](#)) will appear.

Seeker Name	Akkinen, Hary	
SSN	265-67-6787	Referral Date 06/19/2006
Staff	Annapureddy, Madhavi	
Result Date	06/19/2006	
Referral Method	Staff Matching	Result Hired
Pay at Hire	\$65000.00	Unit Yearly
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

Figure 7-17. The Post Result pop-up window

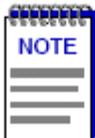
By default, the **Result Date** field will display the current system date.

3. To change the Result Date, highlight the value in the **Result Date** field and enter the desired referral date (in **mmddyyyy** format). The value will be formatted by the system (i.e., separators, such as slashes, are automatically inserted), so enter only numeric characters.



*An error message will result on save if:*

- *The entered Result Date is invalid.*
  - *The entered Result Date is beyond the current system date.*
  - *The entered Result Date is before the Referral Date.*
4. To enter or change the referral method, click on the arrow button (▼) in the **Referral Method** field, and select the desired method from the drop-down list.
  5. To enter or change the referral result, click on the arrow button (▼) in the **Result** field, and select the desired result (e.g., **Hired**, **Not Hired**, **FTR to Interview**, **Refused Job**, etc.) from the drop-down list.



*Referral results will be listed on the Customer Detail window Activities page for the customer:*

6. To enter or change the salary and pay unit (for a hired referral):
  - a. Enter the starting pay amount in the **Pay at Hire** field. Enter the pay value in whole dollar and cent amounts. Commas and dollar signs should not be entered.
  - b. Select the unit of pay (**Hourly**, **Daily**, **Weekly**, **Monthly**, **Yearly** or **Other**) for the specified pay amount by clicking on the arrow button (▼) in the **Unit** field and selecting the appropriate pay unit from the drop-down list.



*If **Hired** is selected for the **Result** field, the **Pay at Hire** and **Unit** fields require entries. The system will automatically populate these fields with the job order's Minimum salary value and unit. These values can be changed if necessary.*

*If anything other than **Hired** is present in the **Result** field, the **Pay at Hire** and **Unit** fields must remain blank in order to save the referral.*



*If the salary entered, when calculated according to the **Pay** and **Unit** fields, is less than the minimum salary of \$10,192.00 per year or greater than the maximum salary of \$350,000.00 per year, a warning message will be generated stating that the entered salary is outside of the expected range.*



*When a referral is added for a job order, AOSOS automatically increments the Number of Referrals value for the order.*

*When a customer's **Result** value is changed to **Hired** for a job with a **Temporary, Seasonal or Regular** duration (full- or part-time), AOSOS automatically changes the customer's **Job Seeker** status to **Inactive**, and increments the Number of Hires for the job order.*

*If the customer is hired for a job with a **Short Term** duration (full- or part-time), the customer's **Job Seeker** field value will remain **Active**. The Number of Hires for the job order will still be incremented.*

7. Click **OK** to perform your changes to the referral, or on **Cancel** to cancel the operation.

EEO Report -

EK Employer Number :	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 15px;"></span>
Start Date :	01/01/2008
Ending Date :	12/31/2008

Date Printed : 02/23/2009

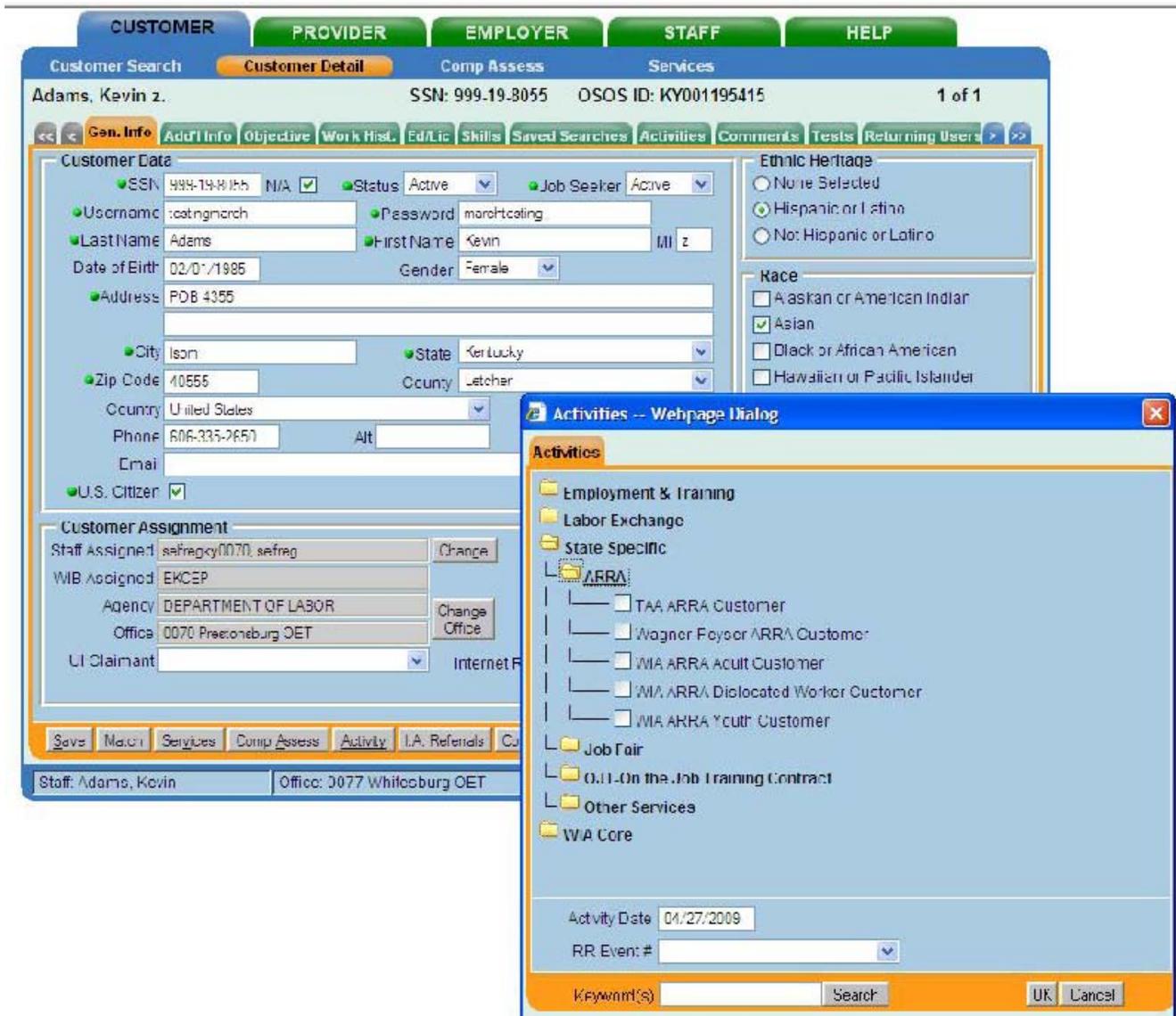
Referrals	Ethnicity							Age				Male	Female	Veterans	Disability
	White	Black or African American	Hispanic or Latino	Alaskan or American Indian	Asian	Hawaiian or Pacific Islander	Other	Under 16	16 - 21	21 - 40	40 and above				
894	378	124	9	1	1	0	199	0	15	343	354	479	233	94	73

Report Summary Page with Totals in each column

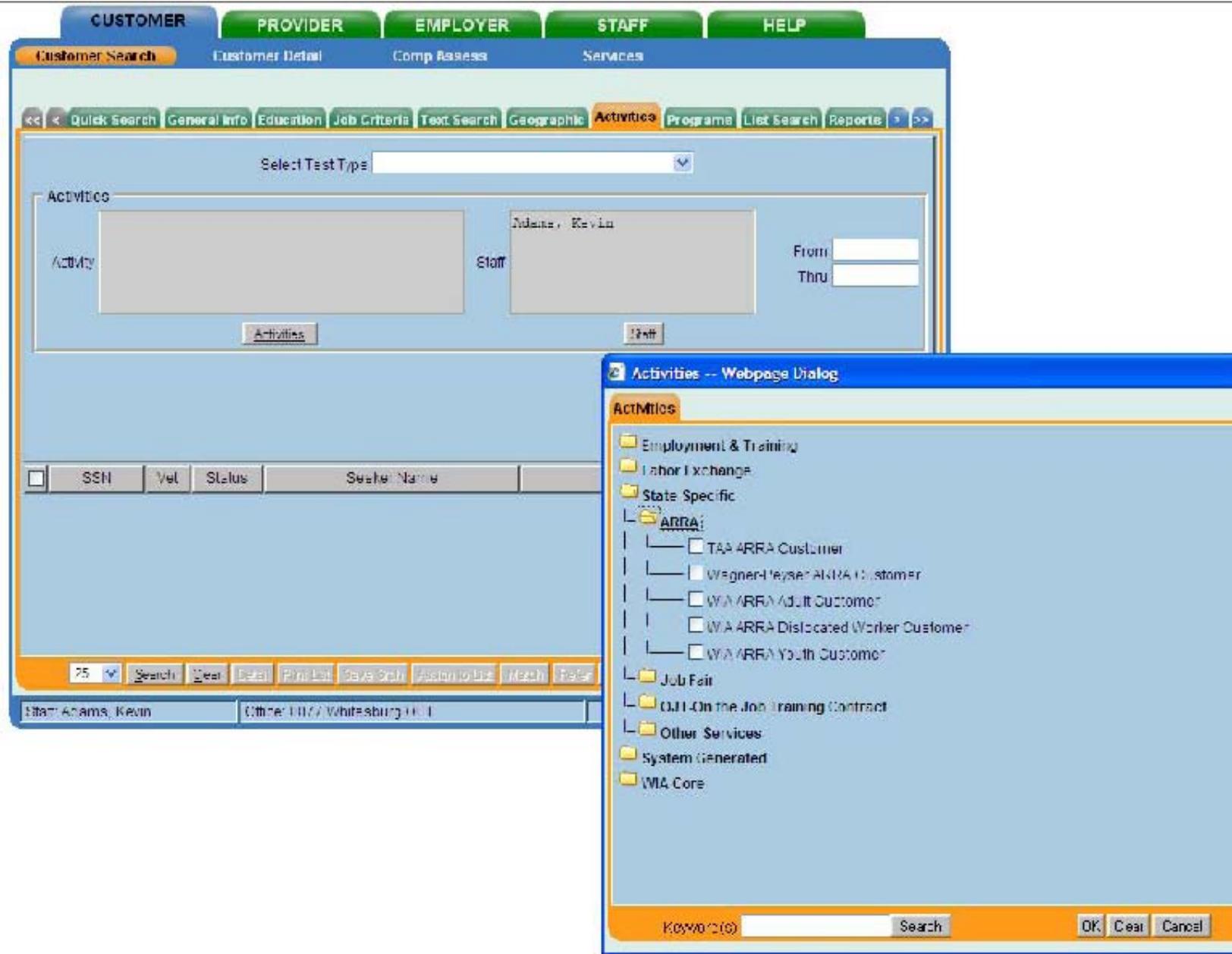
# EKOS ARRA CHANGES

## CUSTOMER RECORDS

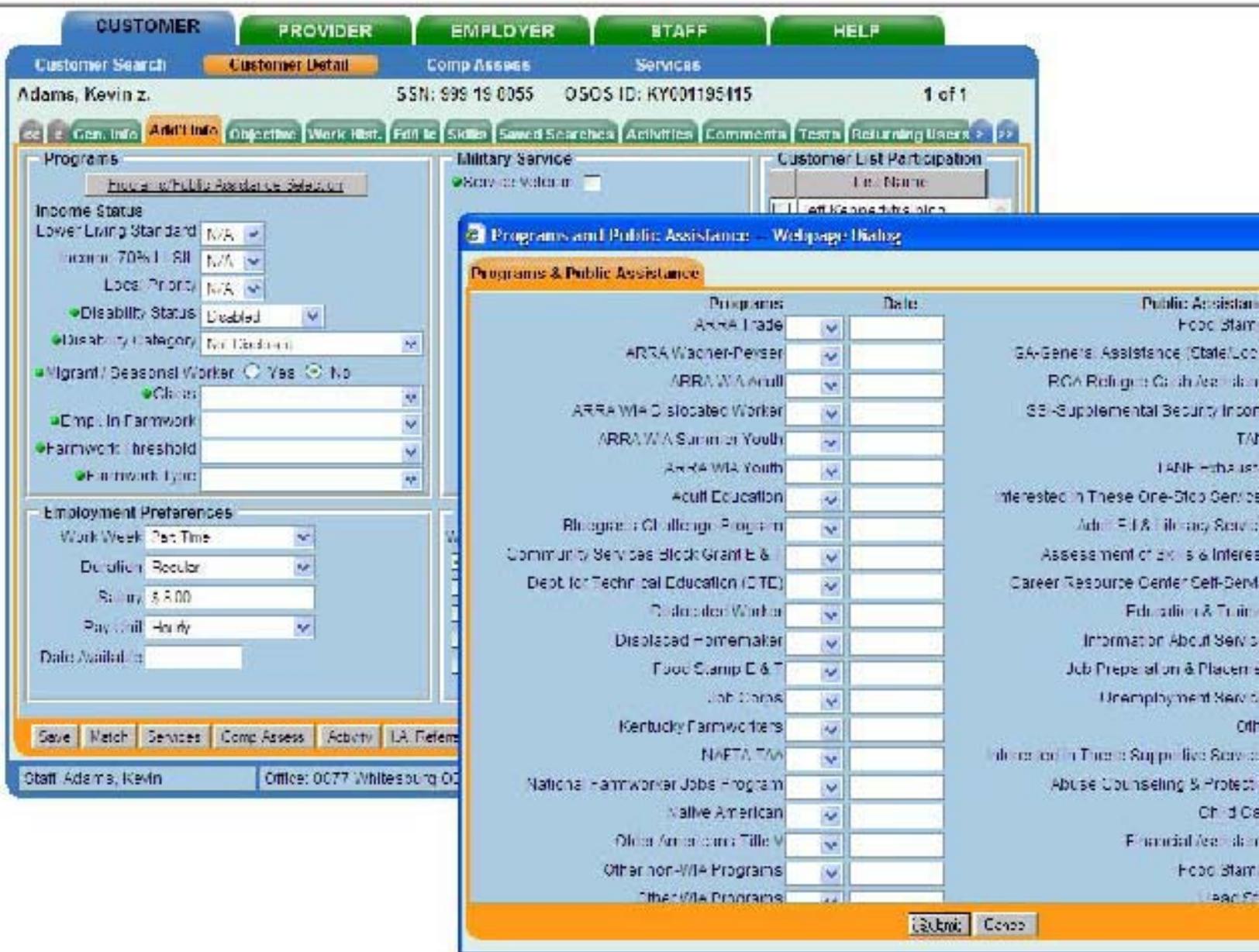
Five ARRA Activities have been added for Customer records.



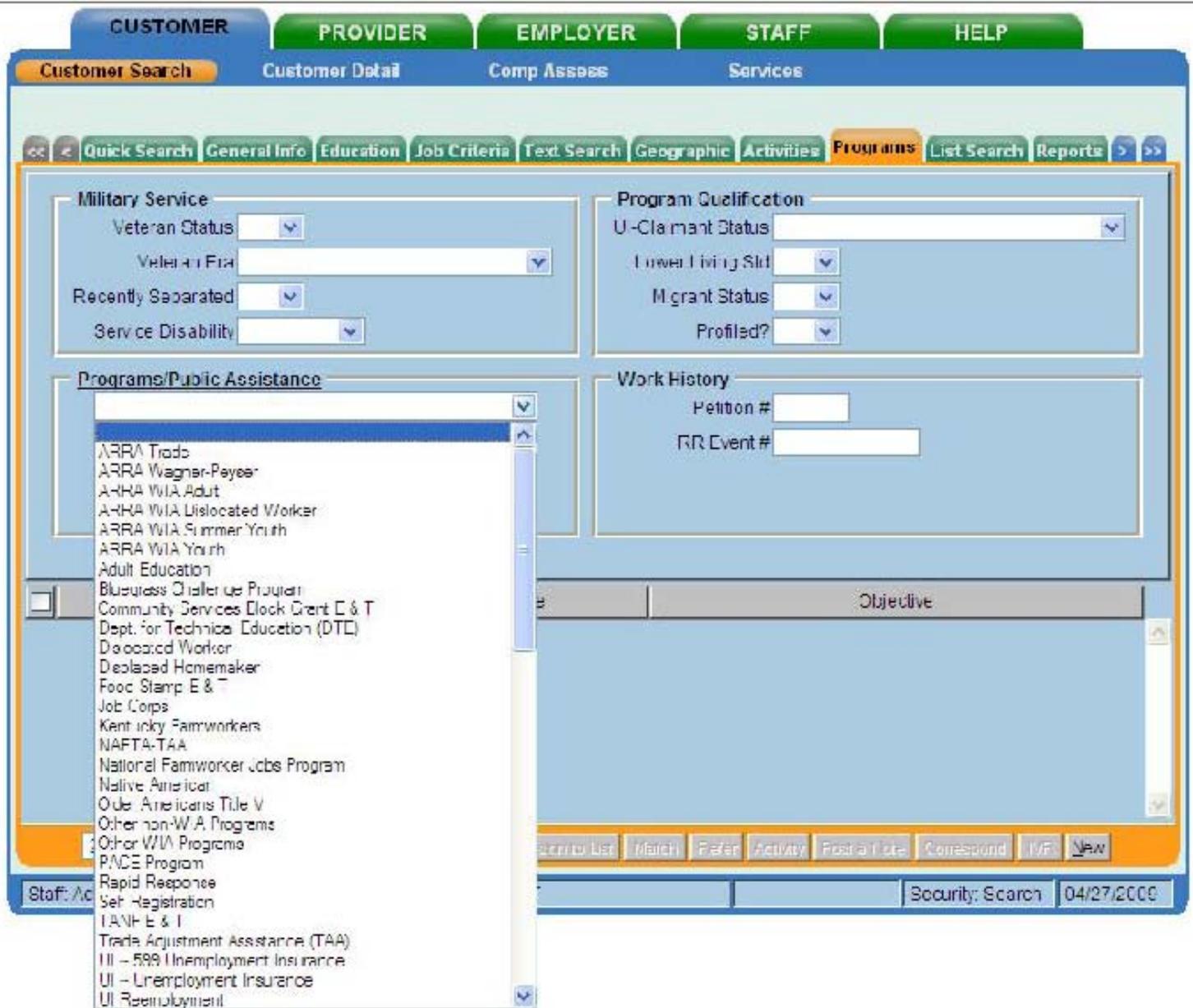
(Screenshot 1 – Customer Activities)  
**Search.**



(Screenshot 2 – Customer Activities Search) (Screenshot 3 – Customer Programs and Public Assistance)



Customer Search.



(Screenshot 4 – Customer Programs and Public Assistance Search)

Changes have been made to Comp Assessment. All WIA Youth barriers, including Youth Needing Additional Assistance and Pregnant/Parenting Youth, are available for the expanded Youth age range of 14-24.

**CUSTOMER** **PROVIDER** **EMPLOYER**

Customer Search Customer Detail **Comp Assess**

Adams, Kevin z. SSN: 999-19-8055

**Employment** Education Financial Family Health Treatments Legal Hou

Origination Date 11/20/2008 Last Update 04/27/2009 Job Be  
 Staff Assigned selfregky0070, selfreg Emplo

**Employment Objective**

Job Title Plumbers  
 Wage Desired \$ 8.00 Per Hourly  
 Geographical Location  
 Algeria Job Se  
 Is the customer interested in non-traditional employment?  Yes  No Job Ke  
 Current Employment Status Not Employed

Poor Work History?   
 Youth Needing Additional Assistance? No   
 Serious Barriers to Employment? Yes  No

**CUSTOMER** **PROVIDER**

Customer Search Customer Detail **Comp Assess**

Adams, Kevin z. SSN: 999-19-8055

**Employment** Education Financial **Family** Health Treatments Legal Hou

**Personal Information**

Marital Status   
 Victim of domestic violence?  Yes  No  
 Family Status

**Members of Household**

	Name	Relationship	Birth Date
<input type="checkbox"/>			

Is customer pregnant? No   
 Delivery Date   
 Is Customer parenting youth? No   
 Yes   
 No

(Screenshot 5 – Youth Additional Assistance) (Screenshot 6 – Pregnant/Parenting Youth) **Staff will still need to enter ARRA WIA customers in the Department of Training & ReEmployment Agency, including Summer Youth Employment (SYP).**

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search    Customer Detail    Comp Assess    **Services**

Adams, Kevin z.    SSN: 999 19 8055    OSOS ID: KY001195415

Agency Info Achievement Objectives Services Service History Enrollments Outcomes Comments Audit Lit/Num Lea

Agency: Department for Training & Re-Employment  
 Intake Date: 04/15/2009    Enrollment Date: 05/01/2009  
 Termination Date:   
 Termination Reason:   
 Status:

Agency	Status
<input checked="" type="checkbox"/> Department for Training & Re-employment	

Staff: Adams, Kevin    Office: 0077 Whiteburg OET    Unsaved Changes    Security: Delete    04/27/2009

(Screenshot 7 – Customer Services - Agency) (Screenshot 8 – Achievement Objective)

**CUSTOMER**   **PROVIDER**   **EMPLOYER**   **STAFF**   **HELP**

Customer Search   Customer Detail   Comp Assess   **Services**

Adams, Kevin z.   SSN: 999 19 8055   OSOS ID: KY001195415

Agency Info   **Achievement Objectives**   Services   Service History   Enrollments   Outcomes   Comments   Audit   | Num Test > >>

Employment Objective: Test record for stimulus funding.  
 Goal Justification: Example of former Employment Work Readiness performance indicator.

**Achievement Objectives**

- Achievement Objective: Work Readiness  
 Type of Goal: Work Readiness   Goal Attainment: Set, but attainment pending  
 Planned Start Date: 05/01/2009    Planned End Date: 09/30/2009  
 Actual Start Date: 05/01/2009   Actual End Date:  
 Evaluation Date: 07/15/2009  
 Closure Reason:  
 Outcome / Status:

Achievement Objective	Type	Attainment
<input checked="" type="checkbox"/> Work Readiness	Work Readiness	Set, but attainment pending

New Objective   Delete Objective   Print

Save   Customer Detail   Comp Assess   Post a Note   Check Labor Market Information

Staff: Adams, Kevin   Office: 0077 Whitesburg CET   Unsaved Changes   Security: Delete   04/28/2009

Youth.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services

Adams, Kevin z.      SSN: 999 19 8055      OSCS ID: KY001195415

<< < Agency Info Achievement Objectives Services Service History Enrollments Outcomes Comments Audit Lit/Num.ies > >>

**Detail**

Provider Name: EXCEP ONE STOP

Original Obligation:      Total Obligation: \$ 0.00

Offering Cost: \$ 00      Actual Cost:

Planned Start Date: 05/01/2009      Planned End Date: 09/30/2009

Actual Start Date: 05/01/2009      Actual End Date:

Next Contact Date: 11/15/2009      Minimum Hours:

Program Div. Type: Youth Services      Completed:

Number of Weeks:

Min. Prog. Agree:

Activ. Objective: Work Readiness

Program: W/A Older Youth - Out of School

Agency: Department for Training & Re-Employ.      Change Office

Office: EXCEP OFFICE

**Funding**

Level	Source	Obligated	Actual	Oblig #

Total Funding:      Add   Edit   Delete

Petition #:      v

RR Event #:      v

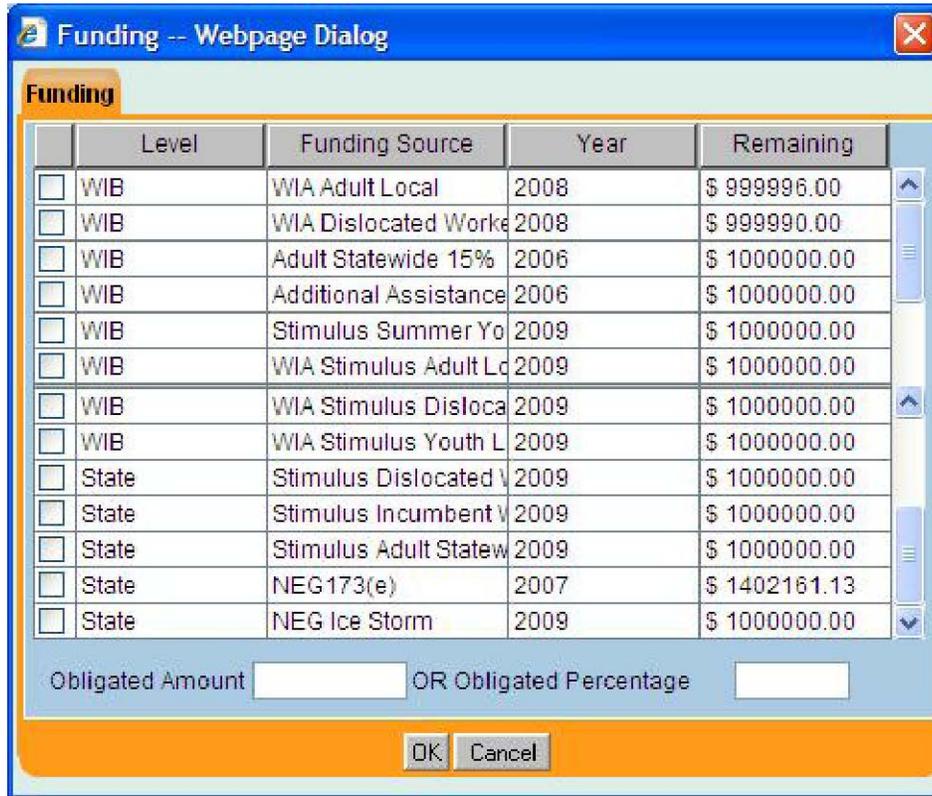
Achievement Objective	Service
<input checked="" type="checkbox"/> Summer Employment Sample	SUMMER YOUTH EMPLOYMENT

New Service Delete Service Authorization PA Service Summary Payments Tracking Change Actual Cost

Save Customer Detail Comp Assess Post a Note Check Labor Market Information

Staff: Adams, Kevin      Office: 0077 Whitesburg DET      Unsaved Changes      Security: Delete      01/27/2009

(Screenshot 9 – Services)



(Screenshot 10 – Funding Streams)

Fund Name	ARRA/Formula	Age Limit	WIB/Statewide	Enrollment
WIA Adult Local	Formula	18-99	WIB	WIA/
<b>WIA Stimulus Adult Local</b>	<b>ARRA</b>	<b>18-99</b>	<b>WIB</b>	<b>WIA/</b>
Adult Statewide 15%	Formula	18-99	Statewide	WIA/
<b>Stimulus Adult Statewide 15%</b>	<b>ARRA</b>	<b>18-99</b>	<b>Statewide</b>	<b>WIA/</b>
Incumbent Worker 15%	Formula	18-99	Statewide	WIA/
<b>Stimulus Incumbent Worker</b>	<b>ARRA</b>	<b>18-99</b>	<b>Statewide</b>	<b>WIA/</b>

<b>15%*</b>				
WIA DW Local	Formula	18-99	WIB	WIA/
<b>WIA Stimulus DW Local</b>	<b>ARRA</b>	<b>18-99</b>	<b>WIB</b>	<b>WIA/</b>
Additional Assistance	Formula	18-99	Statewide	WIA/
DW Statewide 15%	Formula	18-99	Statewide	WIA/
<b>Stimulus DW Statewide 15%</b>	<b>ARRA</b>	<b>18-99</b>	<b>Statewide</b>	<b>WIA/</b>
Rapid Response	Formula	18-99	Statewide	WIA/
WIA Youth Local	Formula	14-21	WIB	WIA/
<b>WIA Stimulus Youth Local</b>	<b>ARRA</b>	<b>14-24</b>	<b>WIB</b>	<b>WIA/C</b>
Youth Statewide 15%	Formula	14-99***	Statewide	WIA/
<b>Stimulus Youth Statewide 15%</b>	<b>ARRA</b>	<b>14-99***</b>	<b>Statewide</b>	<b>WIA/</b>
<b>Stimulus Summer Youth</b>	<b>ARRA</b>	<b>14-24</b>	<b>WIB</b>	<b>Stimu Summer</b>

\* - Not Allowed – will not show in EKOS \*\* - Ages 22-24 cannot be correctly reported on WIASRD \*\*\* - Legacy application edit

**Measures Enrollment. It will only create a Stimulus Summer Youth Enrollment.**

CUSTOMER

PROVIDER

EMPLOYER

STAFF

HELP

Customer Search

Customer Detail

Comp Assess

Services

Adams, Kevin z.

SSN: 999 19 8055

OSOS ID: KY001195415

Navigation tabs: << < > >> | **Services** | Service History | Enrollments | Outcomes | Comments | Audit | Lit/Num | Testing | Follow-Up | ARRA | Youth ISS

Enrollment Info

Program Type: Stimulus Summer Youth  
 Enrollment Date: 04/15/2009 Enrolled in Education:   
 Enrolling Service Name:   
 Enrolling Service Type: Summer-Related Employment Opportunities  
 Enrolling Admin: Adams, Kevin  
 Enrolling Office: 0077 Whitesburg OET  
 Staff Assisted: Yes  
 Employment Status: Not Employed

Exit Info

Exit Date:   
 Exit Reason:   
 3rd Qtr Exclusion:   
 Exit Admin:   
 Exit Office:   
 Transaction Date:   
 Transaction Admin:   
 Transaction Office:

Holds

	Start Date	End Date	Reason
<input type="checkbox"/>			

Add Edit Delete

	Program Type	Enr. Date	Enrollment Office	Exit Date	Exit Office	IA
<input checked="" type="checkbox"/>	Stimulus Summer Y	04/15/2009	0077 Whitesburg OET			Yes

Print Exit Employment Participant History

Save Customer Detail Comp Assess Post a Note Check Labor Market Information

Staff: Adams, Kevin

Office: 0077 Whitesburg OET

Security: Do etc

04/27/2009

CUSTOMER

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Customer Search

Customer Detail

Comp Assess

Services

Adams, Kevin z.

SSN: 999 19 8055

OSOS ID: KY001195415

cc c yes Services Service History Enrollments Outcomes Comments Audit Lit/Num Testing Follow-Up ARRA Youth ISS > >>

	Service	Date	Staff	Agency	Office	SA
<input type="checkbox"/>	New Job Seeker - Staff Assisted	03/31/2007	coltrng coltrngk/OU7	DEPARTMENT OF LAB	0070 Prostonburg O	
<input type="checkbox"/>	ASSLUSMLNT-07	07/01/2007	Kevin Adams	Department for Traini	OTK Central Office WI	
<input type="checkbox"/>	BASIC SKILL 00	05/01/2007	Kevin Adams	Department for Traini	Bell Co JobSight WIA	
<input type="checkbox"/>	ASSESSMENT-07	11/07/2008	tester what is a tester	DEPARTMENT OF LAB	Central Office - EKCE	
<input type="checkbox"/>	ASSESSMENT-07		tester what is a tester	DEPARTMENT OF LAB	Central Office - EKCE	
<input type="checkbox"/>	ASSESSMENT-07	11/07/2008	tester what is a tester	Department for Traini	Bell Co JobSight WIA	
<input type="checkbox"/>	SUMMER YOUTH EMPLOYMENT 3E	04/15/2008	Kevin Adams	Department for Traini	EKCEP OFFICE	
<input type="checkbox"/>	Inter-Agency Referra	03/25/2008	tester what is a tester	Department for Traini	Casey Co WIA	
<input type="checkbox"/>	Inter-Agency Referra	03/25/2008	tester what is a tester	DEPARTMENT OF LAB	8080 Frankfort Central	
<input checked="" type="checkbox"/>	Stimulus Summer Youth Enrollment	04/15/2008	Kevin Adams	DEPARTMENT OF LAB	0077 Whitesburg O-E	Yes

Detail Print List

Save Customer Detail Comp Assess Post a Note Check Labor Market Information

Staff: Adams, Kevin

Office: 0077 Whitesburg OFT

Security: Delete

04/27/2009

**Eligibility Criteria**

Adult Only:		Youth Only:	
Homeless	<input type="checkbox"/>	Homeless/Runaway/Foster Child	<input type="checkbox"/>
		Requires Additional Assistance	<input type="checkbox"/>
<b>Multiple Audience:</b>		Deficient in Basic English Literacy Skills	X
Cash Public Assistance	<input type="checkbox"/>	School Dropout	X
Low Income Priority	<input type="checkbox"/>	Offender	<input type="checkbox"/>
Physical Disability	X	Pregnant or Parenting	<input type="checkbox"/>
Learning Disability	<input type="checkbox"/>	Poor Work History	<input type="checkbox"/>
Other	<input type="checkbox"/>		
Local Priority	<input type="checkbox"/>	<b>Special 5% Rule (Youth only):</b>	
Dislocated Worker	<input type="checkbox"/>	Basic Skills Deficient	X
Displaced Homemaker	<input type="checkbox"/>	One or more grade levels below grade level appropriate age	<input type="checkbox"/>
Food Stamps	<input type="checkbox"/>	Serious Barriers to Employment	<input type="checkbox"/>
Income 70% LLSIL	<input type="checkbox"/>		

**Veteran Info**

Service Veteran

**Additional Info**

UI Claimant

Profiled  Date

Disability Status

Disability Category

Limited English

Reason For Leaving

Dislocation Date

Pell Grant Recipient

Family Status

Parenting Youth

Current Housing

Location Code

Migrant Class

Empl. in Farmwork

Farmwork Threshold

Farmwork Type

CUSTOMER

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HELP

Customer Search

Customer Detail

Comp Assess

Services

Adams, Kevin z.

SSN: 999-19-8055

OSOS ID: KY001195415

Home Services Service History Enrollments Outcomes Comments Audit Lit/Num Learning Follow-Up ARRA Youth ISS

ARRA

	Record Id	Create Admin	Create on Time
<input checked="" type="checkbox"/>			

Record Id

Summer 2009 Employment

Employer Name

Employer Type

Choose the appropriate job sector

Other Pledge

Add Delete Print List

Help Print Record Audit

Save Customer Detail Comp Assess Post a Note Check Labor Market Information

Staff: Adams, Kevin | Office: 0077 Whitesburg DET | Unsaved Changes | Security: Delete | 04/27/2009

**CUSTOMER**   **PROVIDER**   **EMPLOYER**   **STAFF**   **H**

Customer Search   Customer Detail   Comp Assess   **Services**

Adams, Kevin z.   SSN: 999-19-8055   OSOS ID: KY001195415

Services   Service History   Enrollments   Outcomes   Comments   Audit   Licensure Testing   Follow Up

ARRA	Record ID	Create/Admin	Credent Time
<input checked="" type="checkbox"/>	9		

Record ID: 9

Summer 2009 Employment:

Employer Name: Summer Employer Company Name

Employer Type: Private Business

Choose the appropriate job sector: Information Technology

Other Please Specify:

Help   Print Record

Print a Note   Check other Month Information

Printed for Adams, Kevin  
04/27/2009

**Customer**

Seeker ID: KY001195415  
SSN: 999-19-8055  
Last Name: Adams  
First Name: Kevin  
MI: z  
UI Cleantax:

**Cust. (Service Plan)**

Seeker ID: KY001195415

**ARRA Details**

Record ID: 9  
Employer Name: Summer Employer Company Name  
Employer Type: Private Business

Choose the appropriate job sector: Information Technology  
If Other Please Specify:

Print   Show Audit   Cancel

CUSTOMER

PROVIDER

EMPLOYER

STAFF

HELP

Customer Search

Customer Detail

Comp Assess

Services

Adams, Kevin z.

SSN: 099-19-8055

OSOS ID: KY001195415

Services Service History Enrollments Outcomes Comments Audit Lit/Mm Testing Follow Up AUMA Youth ISS

ARRA

Record Id	Create Admin	Creation Time
9	Adams, Kevin	04/27/2009

Record id: 9

Summer 2009 Employment

Employer Name: Summer Employer Company Name

Employer Type: Private Business

Choose the appropriate job sector: Information Technology

If Other Please Specify:

Audit -- Webpage Dialog

OSOS Audit

	Created	Last Modified
Administrato	Adams, Kevin	Adams, Kevin
Office	0077 Whitesburg OET	0077 Whitesburg OET
Date/Time	04/27/2009	04/27/2009

OK

Add Delete Print List

Help Print Record Audit

Save Customer Detail Comp Assess Post a Note Check Labor Market information

Staff: Adams, Kevin

Office: 0077 Whitesburg OET

Security: Delete

04/27/2009

ARRA

# System Help for the ARRA Tab (v. 16)

## General Information

The purpose of this custom tab is to gather information on customers receiving assistance using stimulus funding as a result of (or with funds from) the American Recovery & Reinvestment Act (ARRA) of 2009. If you are experiencing problems or have questions regarding information on this tab please email [ekos.project@hhs.gov](mailto:ekos.project@hhs.gov).

The left side of the tab shows a selection list of all ARRA records for the parent *Cust. (Service Plan)* record. This section of the tab allows you to choose the specific record you wish to view or maintain.

The right side of the tab shows the detailed information for the selected ARRA record.

Authorized administrators may search for *Cust. (Service Plan)* records based on the presence of ARRA records in the Customer Search module.

Data for ARRA records will be kept on the "gw08\_gf\_ara00" table in the database. A history of changes for each ARRA record will be kept in the Warehouse on the "hist\_gw08\_gf\_ara00" table.

## Security

The ARRA tab is only available to authorized administrators providing normal authority levels (create, select, insert, update and delete) based on the security group(s) to which the administrator is associated. Supplemental client navigation (tab) security is also provided based on security groups. If specified, unauthorized administrators will be unable to display the tab.

In addition to security group authorization, the ARRA tab is further restricted to only those administrators who are assigned to those ARRA...

OK

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services

1 - 1 of 1

Info Education Job Criteria Text Search Geographic Activities Programs List Search Reports Participants Custom

Search	Tab Name
<input type="checkbox"/>	Returning Users
<input type="checkbox"/>	e3 Info
<input type="checkbox"/>	Follow-Up
<input type="checkbox"/>	WKMB Training-01
<input type="checkbox"/>	WKMB Training-02
<input type="checkbox"/>	Youth ISE
<input checked="" type="checkbox"/>	ARRA
<input type="checkbox"/>	LibNum Testing

ARRA

Data exists?

Employer Type

Choose the appropriate job sector

1. Other please Specify

SSN	Ver	Status	Seeker Name	Objective	
<input checked="" type="checkbox"/>	999-19-8055	No	Active	Adams, Kevin L	Test record for stimulus funding.

25 Search Clear Detail Print List Save List Assign to List Filter Filter Activity Post a Note Correspond MR New

Staff: Adams, Kevin Office: 0077 Whitesburg DET 04/28/2009

## EMPLOYER RECORDS AND E3

CUSTOMER PROVIDER **EMPLOYER** STAFF HELP

Employer Search Employer Detail Job Order Search **Job Order Detail**

PLPSI Order#: KY02413/5 ID: KY000010341 1 of 1

<< < General Info Contact Info **Job Detail** Job Description Comments Matches Referrals Saved Searches Audit **Referral Info** > >>

Referral Info			
Record ID	Create Admin	Creation Time	
<input checked="" type="checkbox"/>			

**Certifications**

Certifications:   
 EEOC Type:

---

**ARRA**

Result of ARRA:   
 Choose the appropriate job sector:   
 If Other, Please Specify:   
 How long do you expect this job to last?:

---

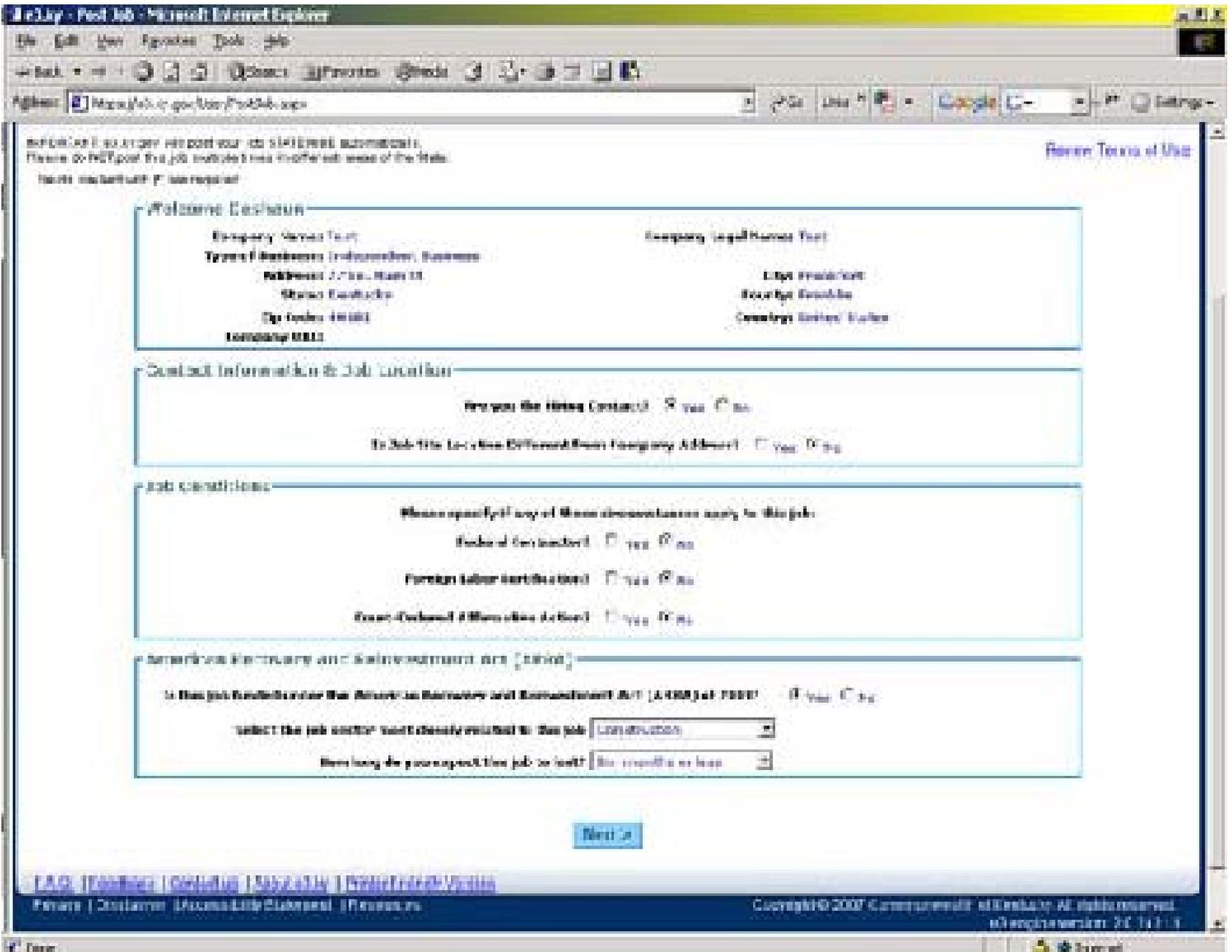
**Job Requirements**

Overtime Required:   
 Minimum Age:   
 Reason for age requirement:   
 Bonding:   
 Credit Check:

Add Delete Print List Help Print Record Audit

Save Duplicate Imp New Job Respond Print Imp Refel Return to Search Match Print + Note Run

Start: Adams, Kevin Office: 0077 Whitesburg, OH Unsaved Changes Security: Delete 04/20/2009



## TRAINING EVALUATION

Subject: \_\_\_\_\_ Date: \_\_\_\_\_

Trainer(s) \_\_\_\_\_

Did this training meet your expectations?  
Circle Yes or No and respond

Yes    NO    Please explain how and why

What was the most **interesting** part of the training?

What was the most **important** new information that you learned?

What **improvements** would you suggest for this training?

How long have you worked for the agency?

Rate the quality of the presentation of material by the instructor(s)

Low-----High  
1      2      3      4      5

Comments on Instructor(s)

Additional Comments: