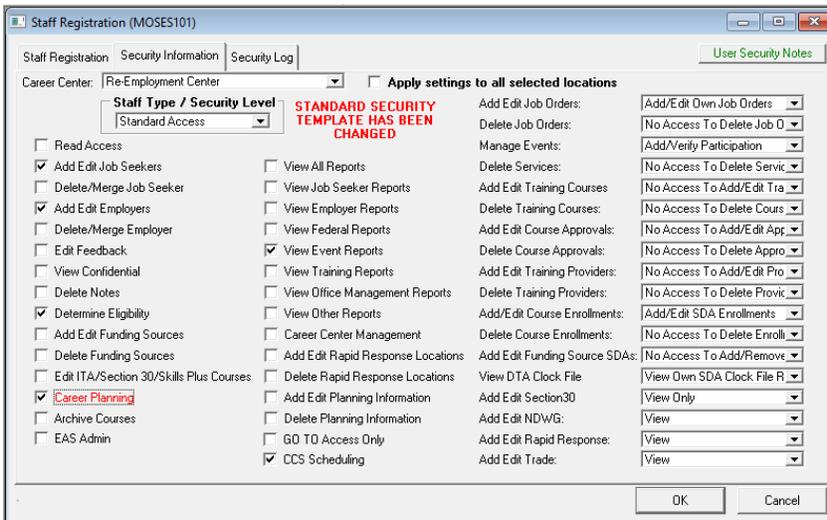
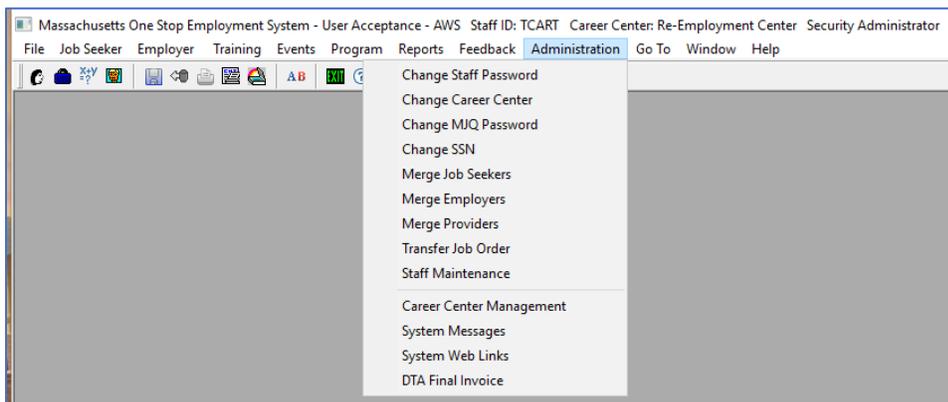


# Administration, Staff Maintenance – Career Planning

In **Staff Maintenance**, the Career Center Supervisor should make sure staff Security Information includes the Career Planning option. Make sure you check the right clearance level and assign this for all career centers where the caseworker has MOSES privileges.



Staff will not have Career Planning rights in MOSES until they have completed Career Planning training and then their MOSES profile is updated with Career Planning Checked off on their MOSES Security Information tab.

Add a note in the User Security Notes to document giving them these rights.

# Case Management – Staff Caseload / Staff Utilization

The **Staff Caseload** tab provides Career Center Supervisor / Coordinator the opportunity to review the caseload for each staff approved for Career Planning.

You can also view the active cases being managed.

The **Cases** portion of the screen gives a list of the cases assigned to that particular staff member.

The screenshot shows the 'Boston Career Link' application window with the 'Staff Caseload' tab selected. The interface is divided into two main sections: 'Staff Caseload' and 'Cases'.

**Staff Caseload Table:**

Staff ID	Maximum Cases	Open Cases	Utilization
DROSSTEST2	0	0	0%
DROSSTEST3	50	0	0%
DTARP	50	3	6%
DTEST1	50	0	0%
EHORANY	999	1	0%
EOSHIRO	51	0	0%
EZHAN	50	9	18%
<b>GBUNN</b>	<b>500</b>	<b>9</b>	<b>2%</b>
GMCCUT	50	0	0%
GUEST1	50	0	0%
HMATT	50	0	0%

**Cases Table:**

Created Date	Applicant ID	First Name	Last Name	Status	Goals Completed/Total
01/27/03	10011335	Mona	Whiner	Suspended	1/1
06/30/04	10016400	Dean	Martin	Suspended	1/1
<b>10/22/04</b>	<b>10013544</b>	<b>Tom</b>	<b>Brady</b>	<b>Open</b>	<b>0/1</b>
01/27/05	10000535	Ernest	Smith	Open	0/1
02/03/04	10016292	Billy Joe	Bobb	Open	0/1
02/05/04	10016295	Frank	Dewars	Suspended	0/2
01/25/05	10016495	Marshall	Faulk	Open	1/1
12/17/04	10016689	Bubba	Hotep	Suspended	0/1
12/17/04	10016769	Travis	Henry	Suspended	0/1
10/01/04	10017314	Lowell	Winger	Suspended	0/1

Buttons at the bottom of the 'Cases' section include: Delete C.M, Suspended Cases, Case Closure, Go To Job Seeker, and Transfer. The 'Staff Utilization' button is located below the 'Staff Caseload' table. The 'OK' and 'Cancel' buttons are at the bottom right of the window.

## Staff Utilization

Highlight a Staff Id on the **Staff Caseload**, then click on the **Staff Utilization** button.

You can increase or decrease the maximum number of cases open at one time (the default number is 50). The maximum number of open / suspended cases that can be assigned at one time is 999.

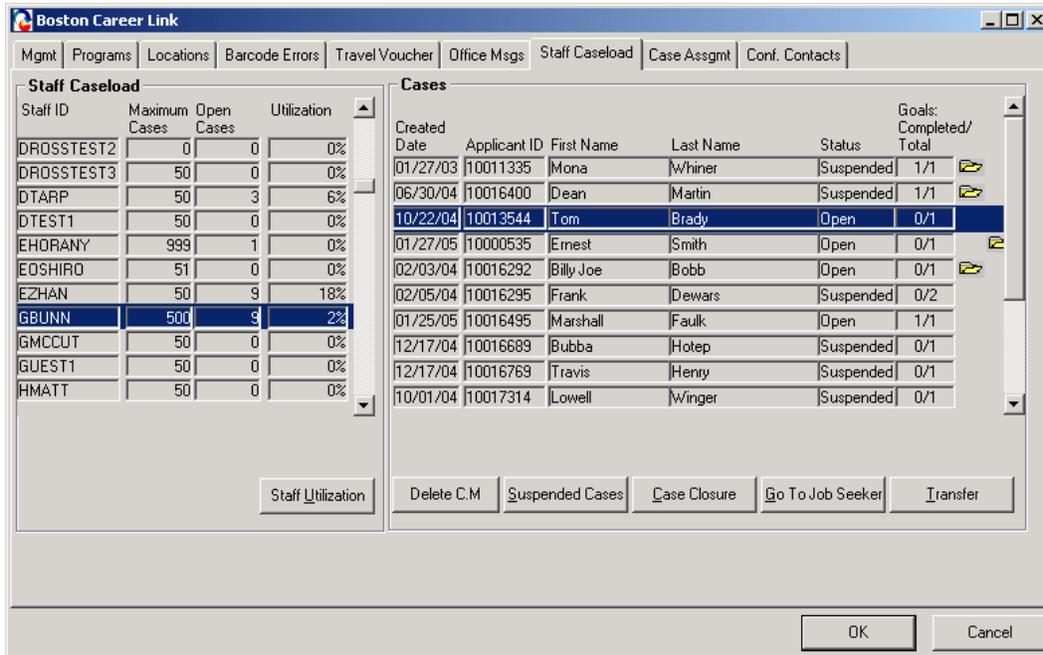


The dialog box titled "Staff Utilization" contains the following fields and values:

Field	Value
Staff ID:	GBUNN
Max. No. of Open Cases:	100
Open Cases:	9
Utilization:	2%

Buttons: OK, Cancel

## General Buttons Overview



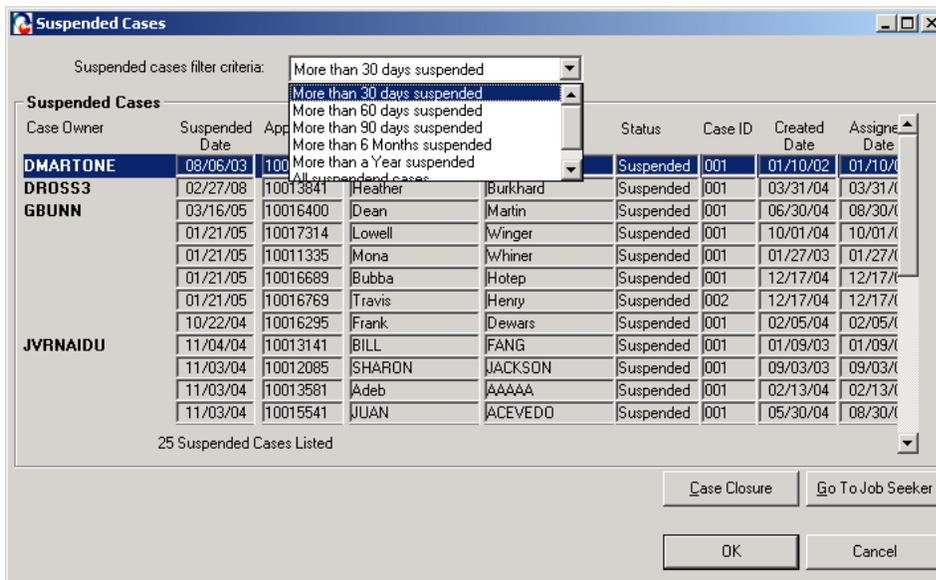
The **buttons** do the following:



Clicking this while highlighting Jobseeker will Delete Case Management (Career Planning) from their record. *Note:* Job Seekers with extensive case plans cannot have their case management deleted, rather they must be closed.

### Suspended Cases

Clicking this will bring up the list of all suspended cases. You can filter the cases by how long they have been suspended.



### Case Closure

This button is used to Close the Career Planning record in the Job Seeker file.

All Goals and tasks in the record must have a status other than Pending for the record to be closed. (See next section.)

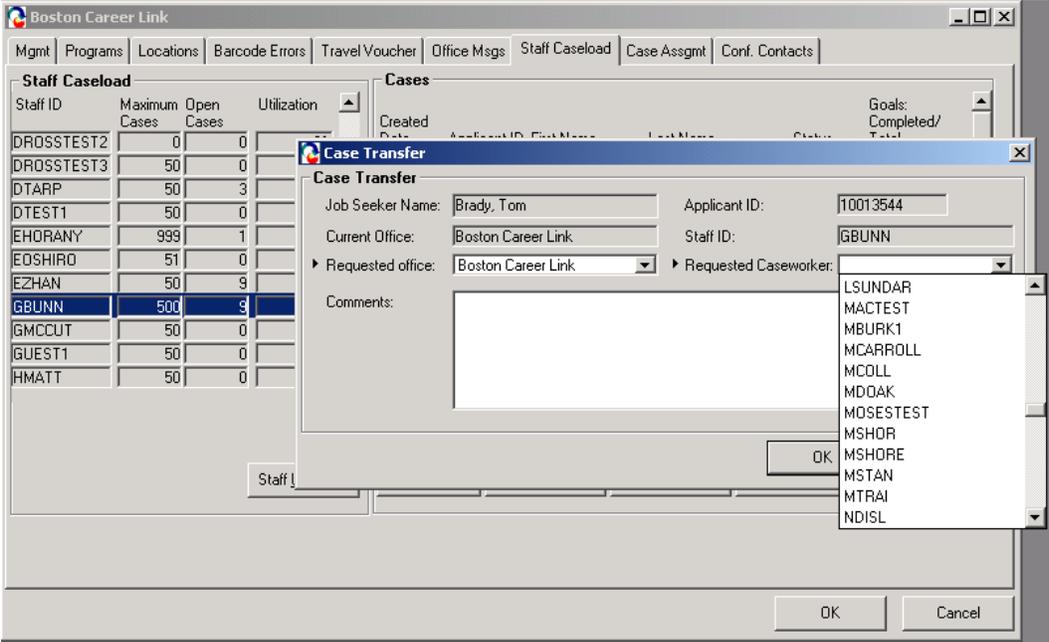
### Go To Job Seeker

This button takes you to the highlighted Job Seeker record.

Transfer

This button allows you to transfer Job Seeker cases to other staff.

You can only transfer within Career Centers that you have rights to.



# Case Management – Close Cases

## Close Cases: Open

Click on the **Staff Caseload** tab to show all the cases of your staff.

It is listed by the **Staff Id** for the primary case manager.

From this part of the screen, you can **Close** or **Transfer** a case, or go directly to the job seeker’s record. It’s always a good idea to state why you are making these changes.

The screenshot shows the 'Boston Career Link' application window. The 'Staff Caseload' tab is active, displaying a table of staff members and their caseloads. The 'Cases' tab is also visible, showing a list of cases with columns for Created Date, Applicant ID, First Name, Last Name, Status, and Goals Completed/Total. The 'Staff Utilization' button is highlighted in the bottom left, and the 'Case Closure' button is highlighted in the bottom right.

Staff ID	Maximum Cases	Open Cases	Utilization
DROSSTEST2	0	0	0%
DROSSTEST3	50	0	0%
DTARP	50	3	6%
DTEST1	50	0	0%
EHDRANY	999	1	0%
EQSHIRO	51	0	0%
EZHAN	50	9	18%
GBUNN	500	9	2%
GMCCUT	50	0	0%
GUEST1	50	0	0%
HMATT	50	0	0%

Created Date	Applicant ID	First Name	Last Name	Status	Goals Completed/Total
01/27/03	10011335	Mona	Whiner	Suspended	1/1
06/30/04	10016400	Dean	Martin	Suspended	1/1
10/22/04	10013544	Tom	Brady	Open	0/1
01/27/05	10000535	Ernest	Smith	Open	0/1
02/03/04	10016292	Billy Joe	Bobb	Open	0/1
02/05/04	10016295	Frank	Dewars	Suspended	0/2
01/25/05	10016495	Marshall	Faulk	Open	1/1
12/17/04	10016689	Bubba	Hotep	Suspended	0/1
12/17/04	10016769	Travis	Henry	Suspended	0/1
10/01/04	10017314	Lowell	Winger	Suspended	0/1

Case Closure

## Closure Issue

Case Closure

You can not **Close** a Career Plan if there are Goals that do not have a **Goal Status** of **Attained**, **Cancelled** or **Did Not Attained**. Remember: **Pending** is a Goal that is being worked on.

You will not be able to **Close** the case without a Goal resolution.

The screenshot shows a 'Cases' table with the following data:

Created Date	Applicant ID	First Name	Last Name	Status	Goals: Completed/ Total
08/11/22	12342158	Dean	Martin	Open	0/1
05/18/22	10197539	Bubba	Hotep	Open	1/1
01/14/22	13293944	Tom	Brady	Open	0/1

An 'Open Goals' dialog box is overlaid on the table, displaying an information icon and the message: 'This case can not yet be closed since some goals remain pending'. An 'OK' button is located at the bottom right of the dialog box.

At the bottom of the 'Cases' window, there are five buttons: 'Delete C.M', 'Suspended Cases', 'Case Closure', 'Go To Job Seeker', and 'Transfer'.

To resolve this, click on **Go To Job Seeker** and update **Goal Status** in the Career Plan. Click **OK** to Save and return to **Administration** tab.

## Closing Career Plans.

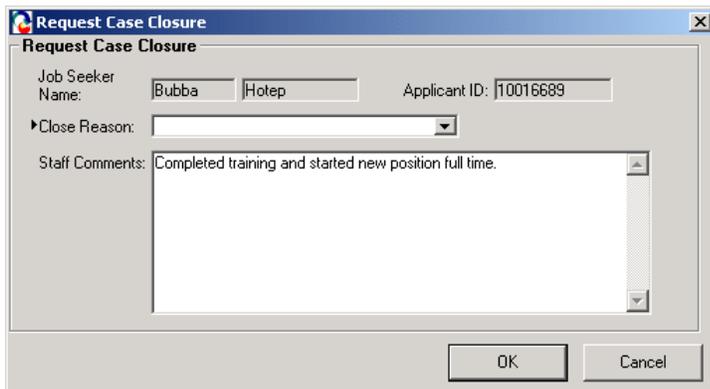
Cases					
Created Date	Applicant ID	First Name	Last Name	Status	Goals: Completed/ Total
08/11/22	12342158	Dean	Martin	Open	0/1
05/18/22	10197539	Bubba	Hotep	Open	1/1
01/14/22	13293944	Tom	Brady	Open	0/1

Buttons: Delete C.M, Suspended Cases, Case Closure, Go To Job Seeker, Transfer

Highlight the Job Seeker you want to Close. Click **Case Closure**.



Make sure to fill in **Close Reason** and provide a **Staff Comments**.



**Request Case Closure**

Job Seeker Name: Bubba Hotep Applicant ID: 10016689

Close Reason: [Dropdown menu]

Staff Comments: Completed training and started new position full time.

Buttons: OK, Cancel

**Close Reasons:**

Select the appropriate **Close Reason**. Note: This is a required field.

**Request Case Closure**

Request Case Closure

Job Seeker Name: Bubba Hotep Applicant ID: 10016689

Close Reason: [Dropdown Menu]

Staff Comments: ll time.

OK Cancel

Click **OK** to save.

## Close Case: Suspended Cases

Click on the **Staff Caseload** tab to show all the cases of your staff.

The **Suspended Cases** button is an easy way for you to see all the cases that may need to be closed at one time.

It is listed by the staff id (Case Owner) for the primary case manager. From this part of the screen you can close or transfer a case, or go directly to the job seeker's record. It's always a good idea to state why you are making these changes.

Case Owner	Suspended Date	App	Status	Case ID	Created Date	Assigne Date
DROSS3	02/27/08	10016400	Suspended	001	03/31/04	03/31/04
GBUNN	03/16/05	10016400	Suspended	001	06/30/04	08/30/04
	01/21/05	10017314	Suspended	001	10/01/04	10/01/04
	01/21/05	10011335	Suspended	001	01/27/03	01/27/03
	01/21/05	10016889	Suspended	001	12/17/04	12/17/04
	01/21/05	10016769	Suspended	002	12/17/04	12/17/04
JVRNAIDU	10/22/04	10016295	Suspended	001	02/05/04	02/05/04
	11/04/04	10013141	Suspended	001	01/09/03	01/09/03
	11/03/04	10012085	Suspended	001	09/03/03	09/03/03
	11/03/04	10013581	Suspended	001	02/13/04	02/13/04
	11/03/04	10015541	Suspended	001	05/30/04	08/30/04
	11/03/04	10016336	Suspended	001	03/29/04	03/29/04

Highlight the Job Seeker you want to Close. Click **Case Closure**.

Make sure to fill in **Close Reason** and provide a **Staff Comments**.

Request Case Closure

Job Seeker Name: Bubba Hotep      Applicant ID: 10016689

Close Reason: [Dropdown]

Staff Comments: Completed training and started new position full time.

OK      Cancel

**Close Reasons:**

Select the appropriate **Close Reason**. Note: This is a required field.

**Request Case Closure**

Job Seeker Name: Bubba Hotep Applicant ID: 10016689

Close Reason: [Dropdown Menu]

Staff Comments: ll time.

OK Cancel

Click **OK** to save.

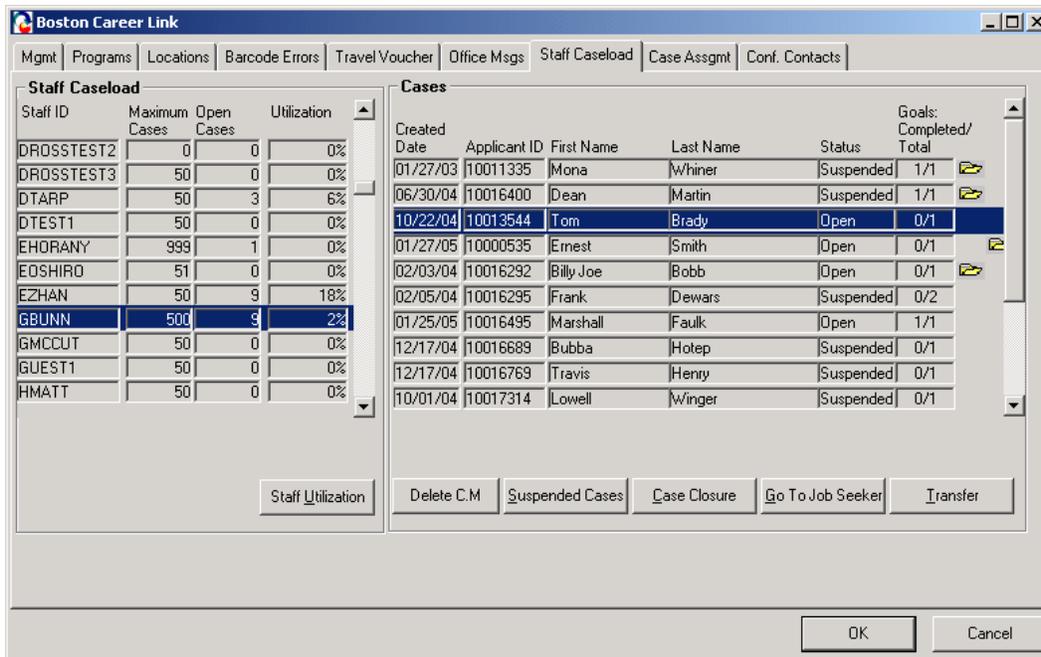
# Case Management – Transferring Cases

The **Staff Caseload** tab provides Career Center Supervisor / Coordinator the opportunity to review the caseload for each staff approved for Career Planning.

You can also view the active cases being managed.

The Cases portion of the screen gives a list of the cases assigned to that staff member.

This is where we will **Transfer** customers.



## Transferring Cases in your Office

Select the Staff ID you want. It will show their Cases.

Highlight the Job Seeker (Career Plan) that you wish to Transfer.

Cases					
Created Date	Applicant ID	First Name	Last Name	Status	Goals: Completed/Total
08/11/22	12342158	Dean	Martin	Open	0/1
05/18/22	10197539	Bubba	Hotep	Open	1/1
01/14/22	13293944	Tom	Brady	Open	0/1

Buttons: Delete C.M, Suspended Cases, Case Closure, Go To Job Seeker, Transfer

Click **Transfer**.

Case Transfer

**Case Transfer**

Job Seeker Name: Hotep, Bubba      Applicant ID: 10197539

Current Office: Pittsfield Career Center      Staff ID: BLETO

Requested office: Pittsfield Career Center      Requested Caseworker:

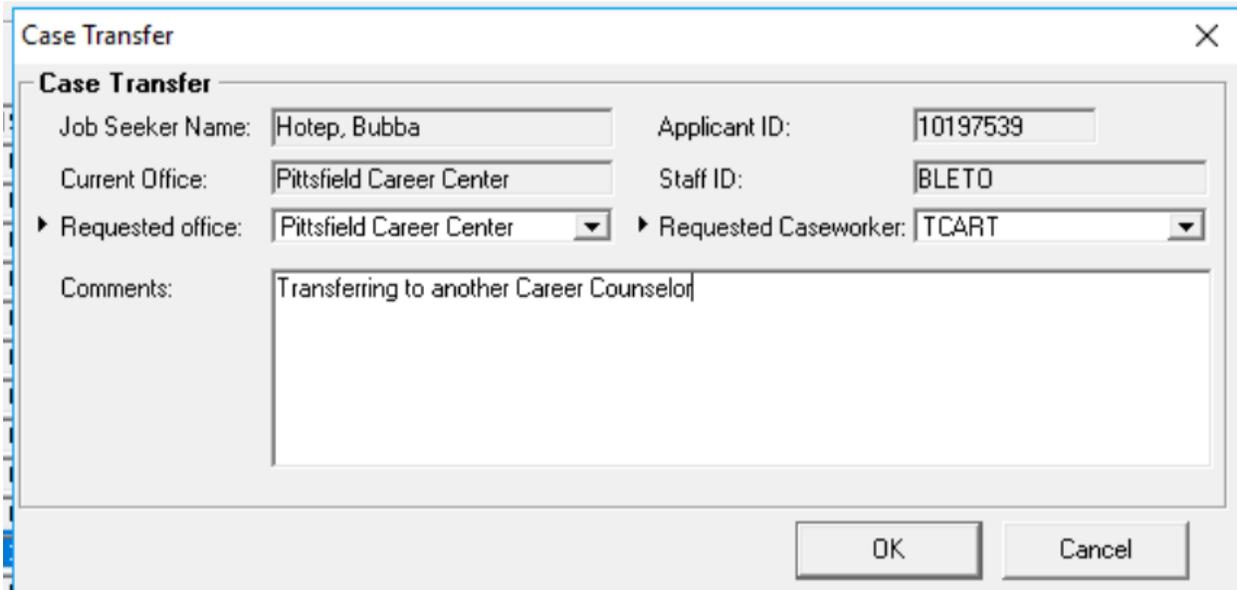
Comments:

OK      Cancel

You may want to enter a **Comment**.

Select the **Requested Caseworker** from the drop menu.

Note: You will only have access to Caseworkers in your Career Center.



The image shows a 'Case Transfer' dialog box with the following fields and values:

Field	Value
Job Seeker Name:	Hotep, Bubba
Applicant ID:	10197539
Current Office:	Pittsfield Career Center
Staff ID:	BLETO
Requested office:	Pittsfield Career Center
Requested Caseworker:	TCART
Comments:	Transferring to another Career Counselor

Buttons: OK, Cancel

## Transferring Cases to Another Office

Highlight the Job Seeker (Career Plan) that you wish to Transfer.

Cases					
Created Date	Applicant ID	First Name	Last Name	Status	Goals: Completed/Total
08/11/22	12342158	Dean	Martin	Open	0/1
05/18/22	10197539	Bubba	Hotep	Open	1/1
01/14/22	13293944	Tom	Brady	Open	0/1

Buttons: Delete C.M, Suspended Cases, Case Closure, Go To Job Seeker, Transfer

Click **Transfer**.

Case Transfer

**Case Transfer**

Job Seeker Name: Hotep, Bubba      Applicant ID: 10197539

Current Office: Pittsfield Career Center      Staff ID: BLETO

Requested office: Pittsfield Career Center      Requested Caseworker:

Comments:

OK      Cancel

You may want to enter a **Comment**.

Select the **Requested Office**.

You will only have those offices assigned to your MOSES account. In some cases, you need to contact the MOSES Help desk to have this done, if it is not an office assigned to you.

This will pull up their list of **Requested Caseworkers**. Select the Caseworker.

The screenshot shows a 'Case Transfer' dialog box with the following fields and values:

Field	Value
Job Seeker Name	Hotep, Bubba
Applicant ID	10197539
Current Office	Pittsfield Career Center
Staff ID	BLETO
Requested office	Re-Employment Center
Requested Caseworker	[Dropdown menu open]

The dropdown menu for 'Requested Caseworker' displays the following list of caseworker IDs:

- ALEWI
- ALLOYA
- BLETO
- BMILL
- CDISL
- CVILA
- DLEDO
- DSNAP
- EKAJU
- EPRES
- IZUNI
- JBOUC

An 'OK' button is located at the bottom right of the dialog box.

Click **OK** to save.

Please make sure the new office knows that this customer is reassigned.

## Closure / Transfer Issue

Case Closure

Transfer

Career Center Staff career plans will be inaccessible, if the Career Center Staff MOSES account is **INACTIVE**, had their MOSES rights **terminated**, or the staff member has been assigned to another office.

# Case Management – Case Assignment

## Main Menu Bar, Administration, Career Center Management, Case Assignment

There are two ways for a career center to assign cases.

The first is for the manager to assign all the cases (called **Manager Assigned**). If this is your chosen method, you must actively check this area and assign the cases so the MOSES Career Planning tool can be used for that Customer.

The second is for the approved caseworkers to assign the cases to themselves when they click in the **Apply** checkbox for **Career Planning** in the **Programs** area of the Job Seeker **Basic** tab (this is called **Self-Assigned**).

All Customers listed in the Select Case area need to be assigned before you can switch from **Manager Assigned** to **Self-Assigned**.

**Assignment Method**

Manager Assigned     Self-Assigned

**Select Case**

Enrollment Date	Case ID	Applicant ID	First Name	Last Name	Nominating
11/09/2007	001	10019888	Eldrick	Woods	TCART
03/03/2008	001	10019714	military	Test	DROSS3
01/04/2008	001	10018013	DANIEL	CATON	EZHAN
02/01/2008	001	10012323	JOHN	CATALANO	EZHAN

**Staff Caseload**

Staff ID	Maximum Cases	Open Cases	Utilization
7000001	50	0	0%
ACAST	50	0	0%
AHOLT	0	0	0%
AKAKK	50	0	0%
ALARD	50	0	0%

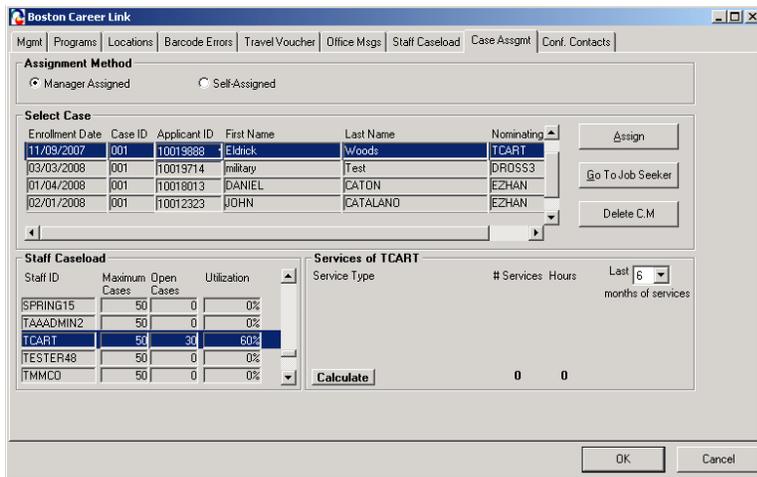
**Services of 7000001**

Service Type	# Services	Hours
	0	0

Last 6 months of services

Buttons: Assign, Go To Job Seeker, Delete C.M., Calculate, OK, Cancel

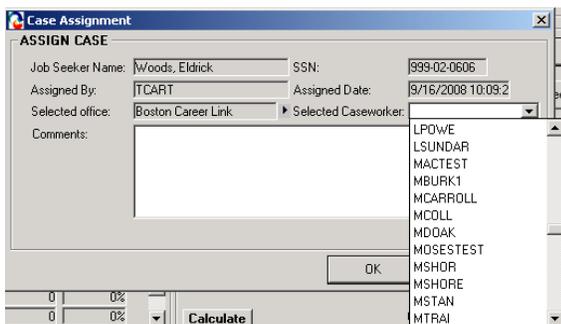
The middle portion of the screen provides a snapshot of the open caseload not yet assigned to any of the assigned caseworkers in your Career Center. All these cases must be assigned before you switch to the Self-Assigned method, or else they become orphaned (enrolled in Case Management, but no assigned caseworker).



To assign Job Seekers in Career Planning to staff click the **Assign** button and select the appropriate caseworker from the Selected Caseworker drop menu.

Note: only staff from your career center will appear on this menu.

Add any appropriate comments and click **Ok** to assign the Job Seeker. The Job Seeker will now appear in the staffs case load.



Delete C.M

Clicking this while highlighting Jobseeker will Delete Case Management from their record.

Note: Job Seekers with extensive case plans cannot have their case management deleted, rather they must be closed. Extensive can mean dates entered in Goals.

Go To Job Seeker

This button takes you to the highlighted Job Seeker record.

Highlight a staff id, and then click on the **Calculate** button to see the types of services credited to this worker. You can vary the time frame.

Calculate

The screenshot shows a software window with a menu bar (Mgmt, Programs, Locations, Barcode Errors, Travel Voucher, Office Msgs, Staff Caseload, Case Assgmt, Conf. Contacts) and several sections:

- Assignment Method:** Radio buttons for "Manager Assigned" (selected) and "Self-Assigned".
- Select Case:** A table with columns: Enrollment Date, Case ID, Applicant ID, First Name, Last Name, Nominating. Below the table are buttons for "Assign", "Go To Job Seeker", and "Delete C.M".
- Staff Caseload:** A table with columns: Staff ID, Maximum Cases, Open Cases, Utilization. The row for "TCART" is highlighted.
- Services of TCART:** A table with columns: Service Type, # Services, Hours. Below it is a "Calculate" button and a "Last" dropdown menu set to "6 months of services".

This is a close-up of the "Services of TCART" section from the previous screenshot. It shows the following data:

Service Type	# Services	Hours
Case Management	1	1
Program Enrollment	2	
Program Exit	2	
Outcomes / Enhancements	2	

Below the table, the "Calculate" button shows a total of 8 services and 1 hour. The "Last" dropdown menu is open, showing options: 6, 12, 18, 24. The "6" option is currently selected.