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 <u>all career</u> <u>centers</u> where the caseworker has MOSES privileges.



| aff Registration | ecurity Information Secu | rity L | pa | | User Security Note |
|-------------------|---------------------------|-------------------------|-----------------------------------|-------------------------------|------------------------------|
| areer Center: Re- | Employment Center | | Apply settings | to all selected locations | |
| St | aff Type / Security Le | vel | STANDARD SECURITY | Add Edit Job Orders: | Add/Edit Own Job Orders 💌 |
| IS | tandard Access | • | TEMPLATE HAS BEEN | Delete Job Orders: | No Access To Delete Job 0 💌 |
| Read Access | | | CHANGED | Manage Events: | Add/Verify Participation |
| 🔽 Add Edit Job S | eekers | \Box | View All Reports | Delete Services: | No Access To Delete Servic 💌 |
| 🔲 Delete/Merge | Job Seeker | \square | View Job Seeker Reports | Add Edit Training Courses | No Access To Add/Edit Tra 💌 |
| 🗹 Add Edit Empl | oyers | \square | View Employer Reports | Delete Training Courses: | No Access To Delete Cours 💌 |
| 🔲 Delete/Merge | Employer | \square | View Federal Reports | Add Edit Course Approvals: | No Access To Add/Edit App 💌 |
| 🔲 Edit Feedback | | $\overline{\mathbf{v}}$ | View Event Reports | Delete Course Approvals: | No Access To Delete Appro 💌 |
| 🔲 View Confiden | tial | \square | View Training Reports | Add Edit Training Providers: | No Access To Add/Edit Pro 💌 |
| 🔲 Delete Notes | | \square | View Office Management Reports | Delete Training Providers: | No Access To Delete Provic 💌 |
| 🔽 Determine Elig | ibility | \square | View Other Reports | Add/Edit Course Enrollments: | Add/Edit SDA Enrollments 💌 |
| 🔲 Add Edit Fund | ing Sources | \Box | Career Center Management | Delete Course Enrollments: | No Access To Delete Enroll |
| 🔲 Delete Funding | g Sources | \Box | Add Edit Rapid Response Locations | Add Edit Funding Source SDAs: | No Access To Add/Remove 💌 |
| 🔲 Edit ITA/Secti | on 30/Skills Plus Courses | \square | Delete Rapid Response Locations | View DTA Clock File | View Own SDA Clock File R 💌 |
| Career Plannin | g | \Box | Add Edit Planning Information | Add Edit Section30 | View Only 💌 |
| Archive Cours | es | \square | Delete Planning Information | Add Edit NDWG: | View |
| 🔲 EAS Admin | | | GO TO Access Only | Add Edit Rapid Response: | View |
| | | ◄ | CCS Scheduling | Add Edit Trade: | View |

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.

| 🔁 Bost | on Care | er Link | | | | | | | | | | |
|---|--|--|--|----------------|--------|---|--|---|--|--|---|--------|
| Mgmt | Program | s Locatio | ns Barcoo | de Errors Tr | avel \ | /oucher 0 | ffice Msgs | Staff Caseload | Case Assgmt | Conf. Contacts | | |
| Staff | Caseloa | ad ——— be | | · · · | | Cases - | | | | | | |
| Staff ID DROSS DROSS DTARF DTEST EHORA EOSHIF EZHAN GMCCL GUEST HMATT | TEST2 TEST3 1 NY 10 11 1 1 1 | ad Maximum Cases 0 50 50 999 51 50 50 50 50 50 50 50 | Open Cases 0 0 3 0 1 1 0 9 9 9 9 9 0 0 0 0 0 | Utilization | ion | Created Date 01/27/03 06/30/04 10/22/04 01/27/05 02/03/04 02/05/04 01/25/05 12/17/04 12/17/04 10/01/04 | Applicant ID 10011335 10016400 10000535 10016292 10016295 10016495 10016689 10016769 10017314 | First Name Mona Dean Ernest Billy Joe Frank Marshall Bubba Travis Lowell | Last Name Whiner Martin Brady Smith Bobb Dewars Faulk Hotep Henry Winger | Status Suspended Suspended Open Open Suspended Open Suspended Suspended Suspended | Goals: Complet Total 1/1 0/1 0/1 0/1 0/2 1/1 0/1 0/1 0/1 | ed/ |
| | | | | | | I | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | OK | | Cancel |

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.

Staff <u>U</u>tilization

| 6 | Staff Utilization | | × |
|---|-------------------------|--------|---|
| | Current Caseload | | |
| | Staff ID: | GBUNN | |
| | Max. No. of Open Cases: | 100 | |
| | Open Cases: | 9 | |
| | Utilization: | 2% | |
| | | | |
| | ОК | Cancel | |

General Buttons Overview

| 🔁 Bosl | ton Care | er Link | | | | | | | | | | | _ | |
|----------------------------|-----------|-----------------------------|--------------------|----------------------|----------|-----------------------------|--------------------------|----------------------|-------------------------------|-----------------|---------------------|--|-------|-----|
| Mgmt | Program | s Locatio | ns Barco | de Errors | Travel | Voucher 0 | ffice Msgs | Staff Caseload | Case Assgmt | Conf. Cont | acts | | | |
| Staff | Caseloa | ad ——— be | · · · · · | | | Cases - | | | | | | | | |
| Staff ID DROSS DROSS | TEST2 | Maximum Cases 0 50 | Open Cases 0 | Utilization | | Created Date 01/27/03 | Applicant IE 10011335 |) First Name Mona | Last Name Whiner Martin | | Status Suspended | Goals: Complet Total 1/1 1/1 | ed/ | |
| DTEST | 1 | 50 | | | 3% | 10/22/04 | 10013544 | Tom | Brady | | Open | 0/1 | | |
| EHOR/ | ANY BO | 999 | | |)%)% | 01/27/05 | 10000535 | Ernest Billu Joe | Smith | | Open | 0/1 | | 2 |
| EZHAN | | 50 | 9 | 18 | 3% | 02/05/04 | 10016295 | Frank | Dewars | | Suspended | 0/2 | | |
| GBUNN GMCCL | I JT | <u>500</u> 50 | 9 0 | | 228 | 01/25/05 | 10016495 | Marshall Bubba | Faulk | | Open | 1/1 0/1 | | |
| GUEST | 1 | 50 | | | 3% | 12/17/04 | 10016769 | Travis | Henry | | Suspended | 0/1 | | |
| | | j 50 | , , | , (| • | 10/01/04 | 10017314 | Lowell | Winger | | Suspended | 0/1 | | - |
| | | | [| Staff <u>U</u> tilia | zation | Delete | C.M <u>S</u> usp | ended Cases | <u>C</u> ase Closure | <u>G</u> o To . | Job Seeker | Ira | nsfer | |
| | | | | | | | | | | | OK | | Can | cel |

The **buttons** do the following:

Delete C.M

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.

| Suspended Case | es | | | | | | | | > |
|----------------|-----------------------|------------------------|---|----------|--------|------|-----------|-----------------|--------------------------|
| Suspended | cases filter criteria | * More th | an 30 days suspende | d 💽 | | | | | |
| Suspended Case | s | More th | an 30 days suspende an 60 days suspende | <u></u> | | | | | |
| Case Owner | Suspended Date | App More th More th | an 90 days suspende an 90 days suspende an 6 Months suspend | d ed | Status | | Case ID | Created Date | Assigne <u>≜</u> Date |
| DMARTONE | 08/06/03 | 100 More th | an a Year suspended | T | Suspe | nded | 001 | 01/10/02 | 01/10/0 |
| DROSS3 | 02/27/08 | 10013841 | Heather | Burkhard | Suspe | nded | 001 | 03/31/04 | 03/31/(|
| GBUNN | 03/16/05 | 10016400 | Dean | Martin | Suspe | nded | 001 | 06/30/04 | 08/30/(|
| | 01/21/05 | 10017314 | Lowell | Winger | Suspe | nded | 001 | 10/01/04 | 10/01/(|
| | 01/21/05 | 10011335 | Mona | Whiner | Suspe | nded | 001 | 01/27/03 | 01/27/(|
| | 01/21/05 | 10016689 | Bubba | Hotep | Suspe | nded | 001 | 12/17/04 | 12/17/ |
| | 01/21/05 | 10016769 | Travis | Henry | Suspe | nded | 002 | 12/17/04 | 12/17/0 |
| | 10/22/04 | 10016295 | Frank | Dewars | Suspe | nded | 001 | 02/05/04 | 02/05/0 |
| JVRNAIDU | 11/04/04 | 10013141 | BILL | FANG | Suspe | nded | 001 | 01/09/03 | 01/09/(|
| | 11/03/04 | 10012085 | SHARON | JACKSON | Suspe | nded | 001 | 09/03/03 | 09/03/0 |
| | 11/03/04 | 10013581 | Adeb | ممممم | Suspe | nded | 001 | 02/13/04 | 02/13/0 |
| | 11/03/04 | 10015541 | JUAN | ACEVEDO | Suspe | nded | 001 | 05/30/04 | 08/30/(|
| | 25 Suspended C | Cases Listed | | | | | | | • |
| | | | | | | C | ase Closu | ие <u>G</u> o | To Job Seeker |
| | | | | | | _ | | | |
| | | | | | | | OK | | Cancel |
| | | | | | | L | | | |

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.)

<u>G</u>o To Job Seeker

This button takes you to the highlighted Job Seeker record.

<u>T</u>ransfer

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

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

| 🔁 Boston Care | eer Link | | | | | | | |
|---------------|-----------------------------|------------------|-------------------|--------------------------|---------------------|------------|----------------------|------|
| Mgmt Program | ns Locations E | Barcode Errors | Travel Voucher 01 | fice Msgs Staff Caseload | Case Assgmt Conf. C | ontacts | | |
| Staff Caselo | ad | | Cases | | | | | 1 |
| Staff ID | Maximum Open Cases Case: | u Utilizati s | on 📥 Created | | | | Goals: Completed/ | - |
| DROSSTEST2 | | | Case Transfer | | | | | × |
| DROSSTEST3 | 50 | | Case Transfer | | | | | |
| DTARP | | 3 | Job Seeker Name: | Brady, Tom | Applicant ID: | 10 | 013544 | r . |
| | 50 | | C | Dester Course Link | Ch-#UD: | ler | | |
| ENUMANT | 533 | | Current Orrice: | Boston Career Link | Stamu: | jue | | |
| EUSHIRU | | | Requested office: | Boston Career Link | Requested C | aseworker: | | |
| EZHAN | 50 | 9 | Comments: | | | LS | SUNDAR | - |
| GBUNN | 500 | 3 | Commonito. | | | M. | AUTEST | |
| GMCCUT | 501 | | | | | I M | | |
| GUESTI | 50 | | | | | M | CANNULL | |
| HMATT | 50 | 0 | | | | M | DΠΔK | |
| | | | | 1 | | M | OSESTEST | |
| | | | | | | M | SHOR | |
| | | | | | | ок М | SHORE | |
| | | Staff I | | | | M | STAN | |
| | | | | | | M | TRAI | |
| L | | | | | | N | DISL | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | OK | 1 0 | |
| | | | | | | UK | | ance |

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.

| 🔁 Boston Care | eer Link | | | | | | | | | | _ | |
|--|--|--|-----------------------|--------|---|---|--|--|---|--|-------|-----|
| Mgmt Program | ns Locatio | ns Barco | de Errors Tr | avel \ | /oucher 0 | ffice Msgs | Staff Caseload | Case Assgmt (| Conf. Contacts | | | |
| Staff Caselo | ad | | | | Cases - | | | | | | | |
| Staff ID DROSSTEST2 DROSSTEST3 DTARP DTEST1 EHORANY EOSHIRO EZHAN GBUNN GMCCUT GUEST1 HMATT | Au Maximum Cases 0 50 50 50 50 50 50 50 50 50 50 50 50 5 | 0pen Cases 0 0 3 3 0 0 1 1 1 0 0 9 9 9 9 0 0 0 0 0 0 0 0 | Utilization | | Created Date 01/27/03 06/30/04 10/22/05 02/03/04 01/27/05 02/03/04 01/25/05 12/17/04 10/01/04 | Applicant ID 10011335 10016400 1001354 10000535 10016292 10016295 10016495 10016689 10016689 10017314 | First Name Mona Dean Tom Ernest Billy Joe Frank Marshall Bubba Travis Lowell | Last Name Whiner Martin Brady Smith Bobb Dewars Faulk Hotep Henry Winger | Status Suspended Open Open Open Suspended Suspended Suspended Suspended | Goals: Complet Total 1/1 1/1 0/1 0/1 0/1 0/1 0/1 0/1 | | |
| | | _ | otan <u>o</u> tiizati | | | | | | | <u></u> 10 | march | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | ОК | | Can | cel |

Case Closure

Closure Issue

<u>C</u>ase 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.



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.

| Created Date Ap 08/11/22 12 | plicant ID 342158 | First Name Dean | Last Name Martin | Status Open | Goals: Completed/ Total 0/1 |
|-----------------------------------|----------------------|--------------------|---------------------|------------------|--------------------------------------|
| 05/18/22 10 | 197539 | Bubba | Hotep | Open | 1/1 |
| 01/14/22 13 | 293944 | Tom | Brady | Open | 0/1 |
| | 1. | | ~ 1 | 1 | |
| Delete C.M | Suspe | nded Cases Ca | ase Closure | Go To Job Seeker | Transfer |

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

<u>C</u>ase Closure

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

| Request Case (- Request Case Cl | Closure Iosure | | | × |
|-------------------------------------|-------------------|------------------------|------------------------|--------|
| Job Seeker Name: | Bubba | Hotep | Applicant ID: 10016689 | |
| Close Reason: | | | • | |
| Staff Comments: | Completed to | raining and started ne | w position full time. | × |
| | | | | |
| | | | OK | Cancel |

Close Reasons:

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

| 🔁 Request Case (| Closure | 1 |
|---------------------|--|---|
| -Request Case Cl | losure | |
| Job Seeker Name: | Bubba Hotep Applicant ID: 10016689 | |
| Close Reason: | • | |
| Staff Comments: | Attending Secondary School at Exit Called Back/Recall Cannot Locate Deceased | |
| | Entered Employment | |
| | Entered Military Service Entered Post-Secondary Education Entered Qualified Apprenticeship | |
| | Family Care OK Cancel | |
| | Lacks Transportation Lost Child Care Met All Case Goals and Tasks Met All Program Goals | |
| | Moved From Area Other, Services Completed Other, Services Not Completed Substance Abuse Or Dependence Transfer Unsubsidized Employment | |
| | | |

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.

| Suspended Cases | | | | | | | | | _ 🗆 × |
|------------------|---------------------|------------------------|--|---------|---|-----------|-----------|-----------------|-------------------|
| Suspended ca | ses filter criteria | : More th | an 30 days suspende | ± • |] | | | | |
| -Suspended Cases | | More th More th | an 30 days suspender an 60 days suspender | | 1 | | | | |
| Case Owner | Suspended Date | App More th More th | an 90 days suspender an 6 Months suspend | d | | Status | Case ID | Created Date | Assigne 📥 Date |
| DROSS3 | 02/27/08 | 100 More th | an a Year suspended | - | | Suspended | 001 | 03/31/04 | 03/31/0 |
| GBUNN | 03/16/05 | 10016400 | Dean Dean | Martin | _ | Suspended | 001 | 06/30/04 | 08/30/0 |
| | 01/21/05 | 10017314 | Lowell | Winger | | Suspended | 001 | 10/01/04 | 10/01/(|
| | 01/21/05 | 10011335 | Mona | Whiner | | Suspended | 001 | 01/27/03 | 01/27/0 |
| | 01/21/05 | 10016689 | Bubba | Hotep | | Suspended | 001 | 12/17/04 | 12/17/0 |
| | 01/21/05 | 10016769 | Travis | Henry | | Suspended | 002 | 12/17/04 | 12/17/(|
| | 10/22/04 | 10016295 | Frank | Dewars | | Suspended | 001 | 02/05/04 | 02/05/(|
| JVRNAIDU | 11/04/04 | 10013141 | BILL | FANG | | Suspended | 001 | 01/09/03 | 01/09/(|
| | 11/03/04 | 10012085 | SHARON | JACKSON | | Suspended | 001 | 09/03/03 | 09/03/0 |
| | 11/03/04 | 10013581 | Adeb | ممممم | | Suspended | 001 | 02/13/04 | 02/13/0 |
| | 11/03/04 | 10015541 | JUAN | ACEVEDO | | Suspended | 001 | 05/30/04 | 08/30/0 |
| | 11/03/04 | 10016336 | James | Drake | | Suspended | 001 | 03/29/04 | 03/29/0 |
| 2 | 5 Suspended (| Cases Listed | | | | | | | - |
| | | | | | | <u>[</u> | ase Closu | re <u>G</u> o | To Job Seeker |
| | | | | | | | OK | | Cancel |

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 | | | x |
|------------------|---------------|------------------------|-----------------------|----------|
| - Hequest Lase L | losure | | | |
| Name: | Bubba | Hotep | Applicant ID: 1001668 | 9 |
| Close Reason: | | | • | |
| Staff Comments: | Completed tra | iining and started new | position full time. | |
| | | | | |
| | | | | |
| | | | | |
| | | | | v |
| <u> </u> | | | | |
| | | | OK | Cancel |

Close Reasons:

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

| 🔁 Request Case (| Closure | 1 |
|---------------------|--|---|
| -Request Case Cl | losure | |
| Job Seeker Name: | Bubba Hotep Applicant ID: 10016689 | |
| Close Reason: | • | |
| Staff Comments: | Attending Secondary School at Exit Called Back/Recall Cannot Locate Deceased | |
| | Entered Employment | |
| | Entered Military Service Entered Post-Secondary Education Entered Qualified Apprenticeship | |
| | Family Care OK Cancel | |
| | Lacks Transportation Lost Child Care Met All Case Goals and Tasks Met All Program Goals | |
| | Moved From Area Other, Services Completed Other, Services Not Completed Substance Abuse Or Dependence Transfer Unsubsidized Employment | |
| | | |

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.

| 隆 Boston Car | eer Link | | | | | | | | | | |
|---|------------------|---------------|-------------|----------|----------------------|----------------------|--------------------|-------------------|-------------------------|----------------------------|----------|
| Mgmt Program | ms Locatio | ns Barco | de Errors | Travel V | oucher 0 | ffice Msgs | Staff Caseload | Case Assgmt C | onf. Contacts | | |
| Staff Caselo | oad ——— | | | | Cases - | | | | | | |
| Staff ID DROSSTEST2 | Maximum Cases | Open Cases | Utilization | ▲ % | Created Date | Applicant ID | First Name | Last Name | Status | Goals: Complet Total | ed/ |
| DROSSTEST3 DTARP | 50 | 0 | 0 | | 01/27/03 | 10011335 10016400 | Mona Dean | /Whiner Martin | Suspended Suspended | 1/1 | d D |
| DTEST1 EHORANY | 50 999 | | | 1% | 10/22/04 01/27/05 | 10013544 10000535 | Tom Ernest | Brady Smith | Open Open | 0/1 | |
| EOSHIRO EZHAN | 51 | 0 | 0 | | 02/03/04 | 10016292 | Billy Joe Frank | Bobb | Open Suspended | 0/1 | æ |
| GBUNN | 500 | 9 | 2 | | 01/25/05 | 10016495 | Marshall | Faulk | Open | 1/1 | i |
| GUEST1 | 50 | | | | 12/17/04 | 10016589 | jBubba Travis | Hotep | Suspended Suspended | 0/1 | ļ |
| IMALI | j 50 | j u | j 0 | * - | 10/01/04 | 10017314 | Lowell | Winger | Suspended | 0/1 | _ |
| Staff Utilization Delete C.M Suspended Cases Case Closure Go To Job Seeker Iransfer | | | | | | | | | | | |
| | | | | | | | | | ОК | | Cancel |

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.

| Created Date 08/11/22 | Applicant ID 12342158 | First Name Dean | Last Name Martin | Status Open | Goals: Completed/ Total 0/1 |
|-----------------------------|--------------------------|--------------------|---------------------|----------------|--------------------------------------|
| 05/18/22 | 10197539 | Bubba | Hotep | Open | 1/1 |
| 01/14/22 | 13293944 | Tom | Brady | Open | 0/1 |
| | | | | | |
| Delete 0 | C.M Suspe | ended Cases | Case Closure Go 1 | lo 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 Caseworke | r. 🗨 |
| Comments: | | | |
| | | | |
| | | | |
| | | | |
| | 1 | | |
| | | 0 | 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.

| ſ | Case Transfer | | | > | × |
|---|-------------------|-----------------------------------|-------------------------|----------|---|
| | Case Transfer — | | | | |
| | Job Seeker Name: | Hotep, Bubba | Applicant ID: | 10197539 | |
| | Current Office: | Pittsfield Career Center | Staff ID: | BLETO | 1 |
| l | Requested office: | Pittsfield Career Center | ► Requested Caseworker: | TCART | ſ |
| | Comments: | Transferring to another Career Co | ounselor | | |
| | | | ОК | Cancel | |

Transferring Cases to Another Office

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

| Created Date 08/11/22 | Applicant ID 12342158 | First Name Dean | Last Name Martin | Status Open | Goals: Completed/ Total 0/1 |
|-----------------------------|--------------------------|--------------------|---------------------|-----------------|--------------------------------------|
| 05/18/22 | 10197539 | Bubba | Hotep | Open | 1/1 |
| 01/14/22 | 13293944 | Tom | Brady | Open | 0/1 |
| | | | | | Torrector |
| Delete 0 | C.M Suspe | ended Cases | Case Closure G | o To Job Seeker | Transfer |

Click Transfer.

| - | Case Transfer | | | | | \times |
|---|--|--|--|----------------------------------|-----------|----------|
| | Case Transfer Job Seeker Name: Current Office: Requested office: Comments: | Hotep, Bubba Pittsfield Career Center | Applicant IC Staff ID: Requested | D: [10197 BLET Caseworker: | 7539 D | • |
| | | | | 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.

| | | | | _ |
|-------------------|--------------------------|-----------------------|----------|--------------|
| Case Transfer | | | > | < |
| Case Transfer | | | | |
| Job Seeker Name: | Hotep, Bubba | Applicant ID: | 10197539 | |
| Current Office: | Pittsfield Career Center | Staff ID: | BLETO | |
| Requested office: | Re-Employment Center | Requested Caseworker: | | |
| | | | ALEWI | ^ |
| Comments: | | | ALOYA | |
| | | | BLETO | |
| | | | BMILL | |
| | | | CDISL | |
| | | | CVILA | |
| | 1 | | DLEDO | |
| L | | | DSNAP | |
| | | пк | EKAJU | |
| | | | EPRES | |
| | | | IZUNI | |
| | | | JBOUC | \checkmark |

Click OK to save.

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

Closure / Transfer Issue



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**.

| 🔁 Boston Career I | Link | | | | | | | | |
|-------------------|------------------------|---------------------|--------------|------------|---------------------------|------------------|---------|--------------------|--------|
| Mgmt Programs I | Locations | Barcode Erro | ors Travel | Voucher 0f | ffice Msgs Staff Caseload | Case Assgmt Co | onf. Co | ontacts | |
| -Assignment Met | thod — | | | · · · · | | | | | |
| Manager Assig | gned | O S | elf-Assigned | | | | | | |
| Select Case | | | | | | | | | |
| Enrollment Date | Case ID | Applicant ID | First Name | | Last Name | Nominating | | Assign | |
| 11/09/2007 | 001 | 10019888 | Eldrick | | Woods | TCART | | | |
| 03/03/2008 | 001 | 10019714 | military | | Test | DROSS3 | | Go Toulob Seeker | |
| 01/04/2008 | 001 | 10018013 | DANIEL | | CATON | EZHAN | | | |
| 02/01/2008 | 001 | 10012323 | рони | | CATALANO | EZHAN | | Delete C.M | |
| | | | | | | | | Delete C.M | |
| | | | | | . (7000004 | | | | |
| Staff Laseload | | | | Serv | vices of /UUUUUI | # Caniford 1 | 1 | Last C | |
| Staff ID M | laximum L Jases – E | Jpen Utili Cases | zation | | сетуре | # Services i | Hours | months of sorrigos | |
| 7000001 | 50 | d | 0% | | | | | months of services | |
| ACAST | 50 | | 0% | | | | | | |
| AHOLT | To | | 0% | | | | | | |
| AKAKK / | 50 | 0 | 0% | | | | | | |
| ALARO | 50 | | 0% | ▼ Cal | culate | 0 | 0 | | |
| L | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | ОК | 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).

| Boston Career | Link | | | | | | | | _0 |
|-----------------|-----------|--------------|--------------|----------|-----------------------|-------------------|----------|--------------------|----|
| /gmt Programs | Locations | Barcode Err | ors Travel | Voucher | Office Msgs Staff Cas | eload Case Assgmt | Conf. C | ontacts | |
| Assignment Me | ethod | | | | | | | | |
| Manager Ass | igned | C S | elf-Assigned | | | | | | |
| Select Case | | | | | | | | | |
| Enrollment Date | Case ID | Applicant ID | First Name | | Last Name | Nominati | ng 📥 | Assign | |
| 11/09/2007 | 001 | 10019888 * | Eldrick | | Woods | TCART | | | |
| 03/03/2008 | 001 | 10019714 | military | | Test | DROSS3 | | Go To Job Seeker | |
| 01/04/2008 | 001 | 10018013 | DANIEL | | CATON | EZHAN | | | |
| 102/01/2008 | juun | 10012323 | рони | | JCATALANU | JEZHAN | | Delete C.M | |
| • | | | | | | | <u>ن</u> | | |
| Staff Caseload | I | | | | Services of TCART | | | | |
| Staff ID I | Maximum C | Jpen Util | lization | | Service Type | # Service | es Hours | Last 6 💌 | |
| | Cases C | lases | | | | | | months of services | |
| SPHING15 | 501 | | 0% | | | | | | |
| | 50 | 20 | 60% | | | | | | |
| TESTEB48 | 50 | | 0% | | | | | | |
| тммсо | 50 | — ř | 0% | . | Calculate | 0 | 0 | | |
| , | , | - , | | | Guidanato | | | | |
| | | | | | | | | | |
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| | | | | | | | | | |

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.



Assign

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.

<u>G</u>o 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

| Mgmt Programs | Locations | Barcode Err | ors Travel | Voucher | Office Msgs Staff Caseload | Case Assgmt Conf. | Contacts | |
|-----------------|-----------|--------------|--------------|----------|----------------------------|-------------------|--------------------|-------|
| Assignment Me | thod | | | | | | | |
| Manager Assi | igned | C S | elf-Assigned | | | | | |
| Select Case | | | | | | | | |
| Enrollment Date | Case ID | Applicant ID | First Name | | Last Name | Nominating 🔺 | Assign | |
| 11/09/2007 | 001 | 10019888 | Eldrick | | Woods | TCART | | |
| 03/03/2008 | 001 | 10019714 | military | | Test | DROSS3 | Go To Job Seeker | |
| 01/04/2008 | 001 | 10018013 | DANIEL | | CATON | EZHAN | | |
| 02/01/2008 | 001 | 10012323 | JOHN | | CATALANO | EZHAN | Delaw CH | |
| 1.1 | | | | | | | Delete C.M | |
| • | | | | | | | | |
| Staff Caseload | | | | S | ervices of TCART | | | 1 |
| Staff ID M | daximum (| Open Uti | lization | 🔺 S | ervice Type | #Services Hou | rs 🔺 Last 6 💌 | |
| | Cases | Cases | | JC. | ase Management | | months of services | |
| SPRING15 | 50 | | 0% | Pr | ogram Enrollment | 2 | - | |
| TAAADMIN2 | 50 | 0 | 0% | Pr | ogram Exit | 2 | | |
| TLART | 50 | 30 | 60% | | utcomes / Enhancements | 2 | | |
| THURSON D | 50 | | 0% | | | | | |
| пммсо ј | 50 j | 0] | 0% | <u> </u> | Calculate | 8 1 | <u> </u> | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | OK | Cance |
| | | | | | | | | |

| - Services of TCABT | | | | | |
|-------------------------|------------|-------|---|----------|------|
| Service Type | # Services | Hours | | Last 6 💌 |] |
| Case Management | 1 | 1 | 1 | month 6 | ices |
| Program Enrollment | 2 | | 1 | 12 | |
| Program Exit | 2 | | | 24 | |
| Outcomes / Enhancements | 2 | | 1 | | |
| Calculate | 8 | 1 | • | | |