Career Planning Data Entry In MOSES

2026

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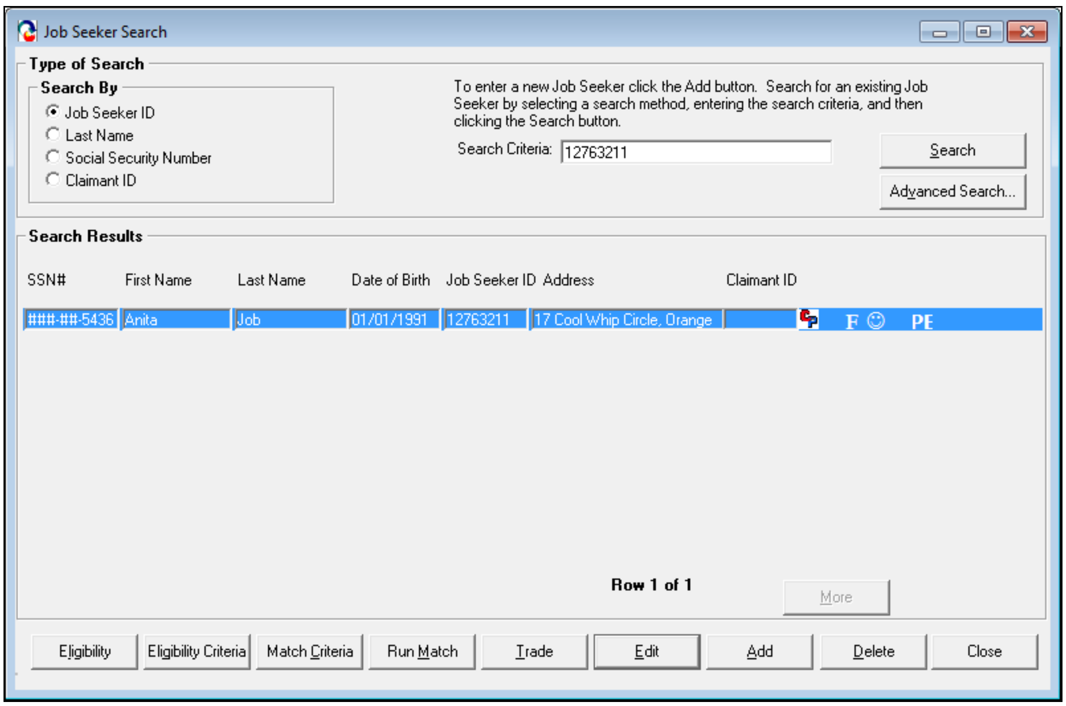
The Career Plan in MOSES

Overview

MOSES has a tool for career planning customers.
Make sure you review their record before enrolling them in Career Planning.

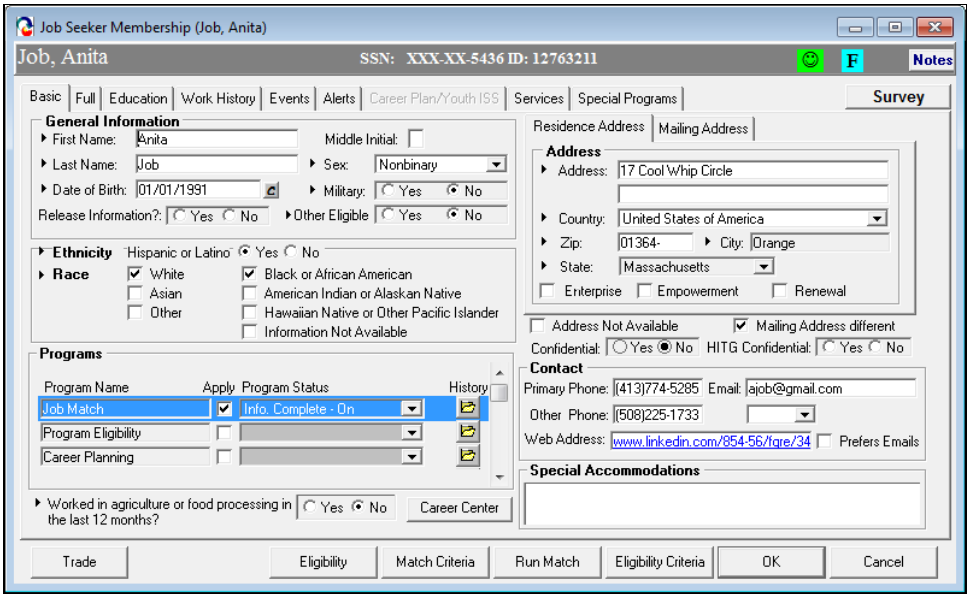
Review Information from the Job Seeker Record

1. Search for the Customer Record that you want to view.



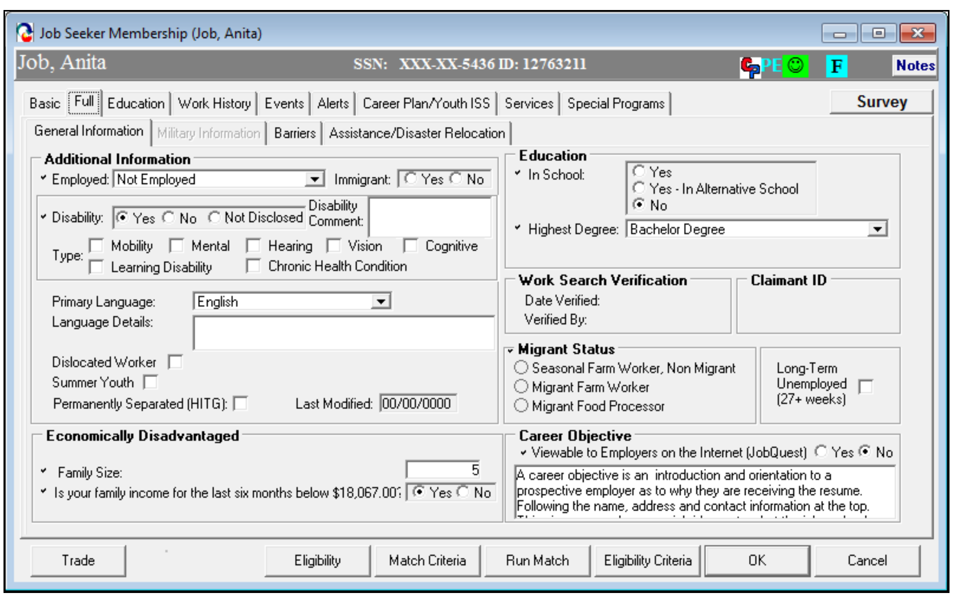
2. Click the **Edit** button or *double click* to open the record.

   The **Job Seeker Membership** window appears. Review the information and make sure it is up to date.



3. Click the **Full** tab.

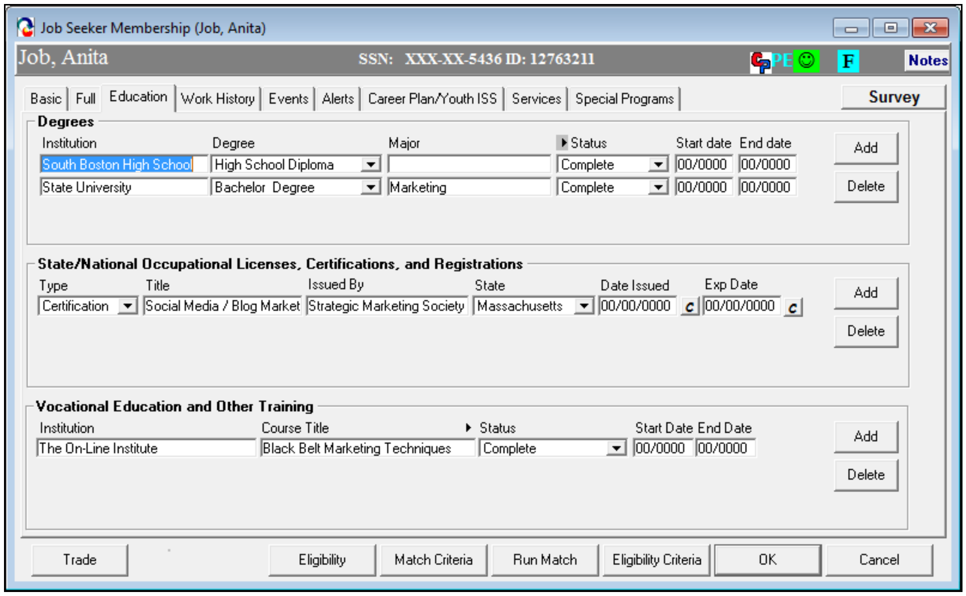
   The **Full** tab screen appears. Review the information. Remember to look at the Military Information, *if it is applicable*.



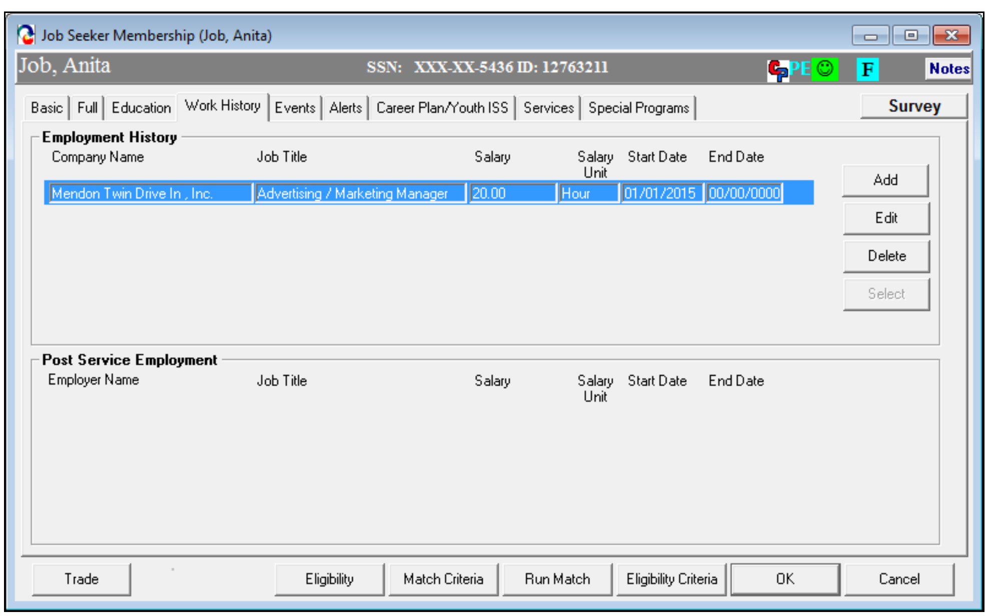
Remember that the Full tab must be completed for customers to be eligible for many of the career center programs and it must be done for job matching.

4. Click the **Education**. The **Education** tab screen appears.

Review the information.



5. Click the **Work History** tab.
The **Work History** tab screen appears. Review the information. Click on the **Edit** button to see more details about each job held.

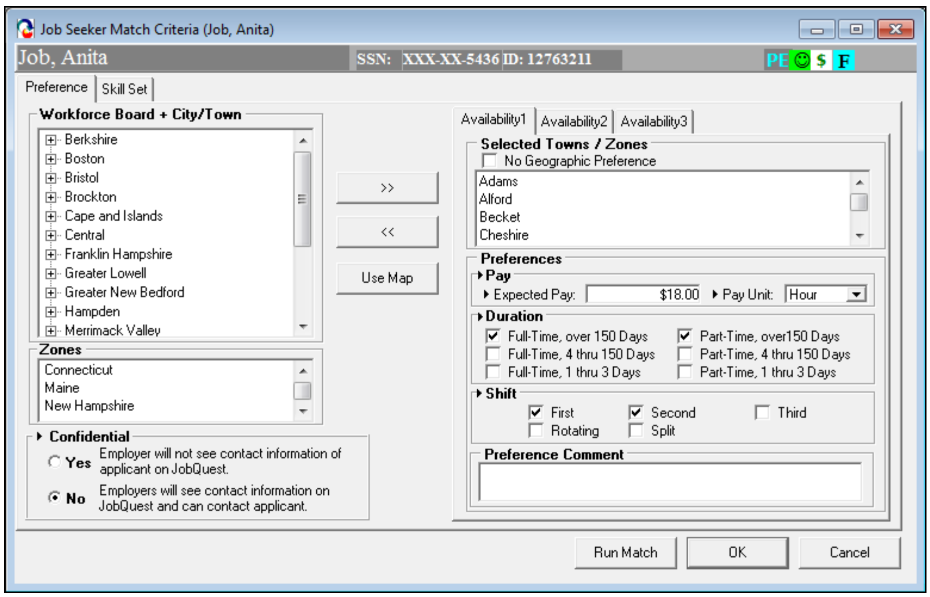


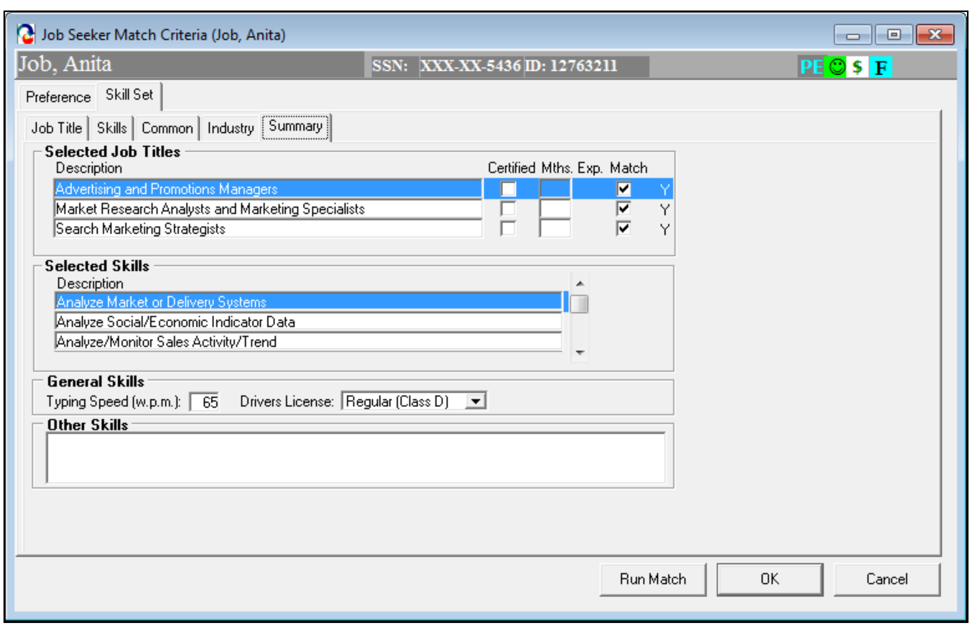
6. Click the **Match Criteria** button.

The **Match Criteria** window appears.

Click on **Skill Set**, then **Summary** tab.

Review the information. Close the screen when you are finished.





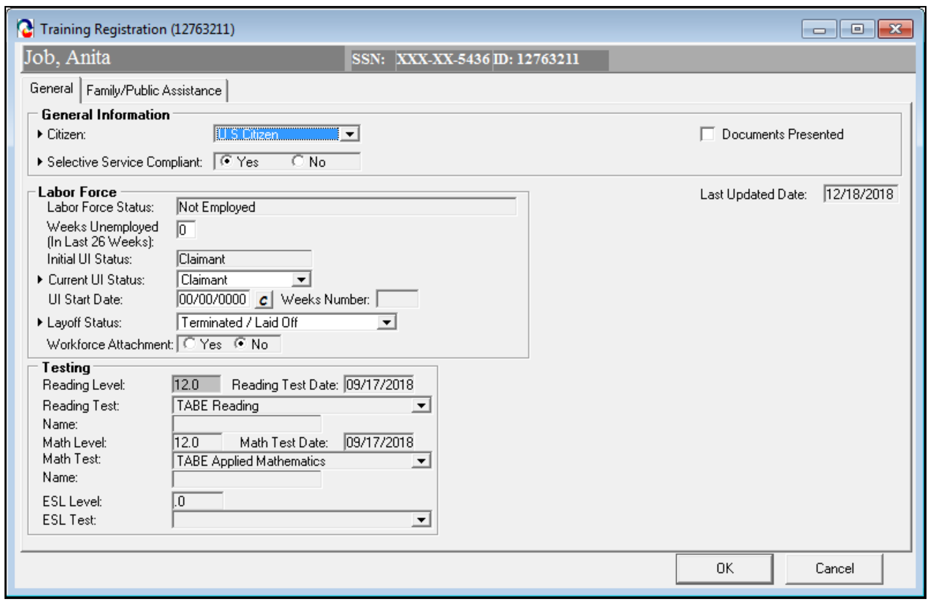
7. Click the **Eligibility Criteria** button at the bottom.

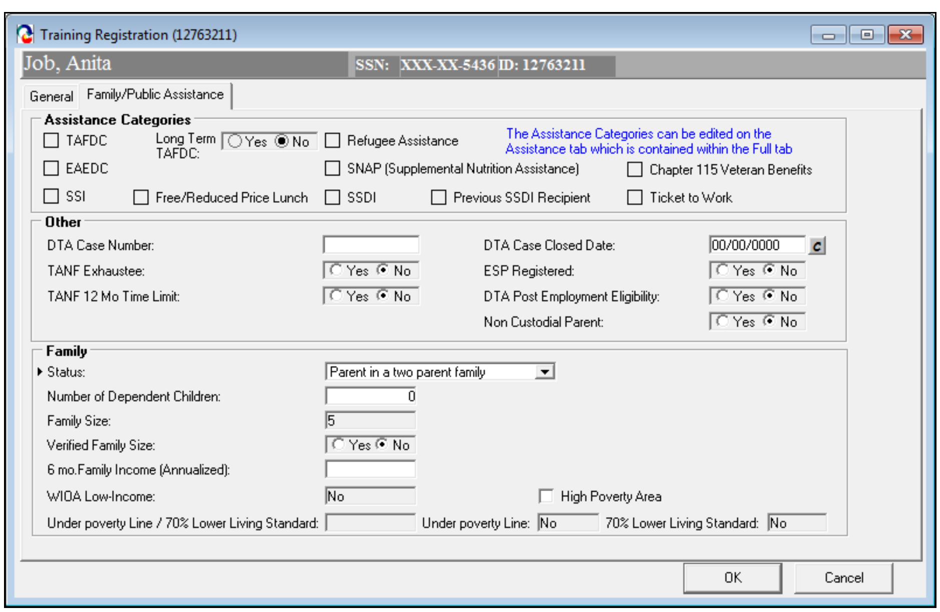
   The **Training Registration** window appears.

   Click on both tabs to review the information.

   Close the screen when you are finished.

   This information will only be completed for Customers where **Program Eligibility** is selected / needed.

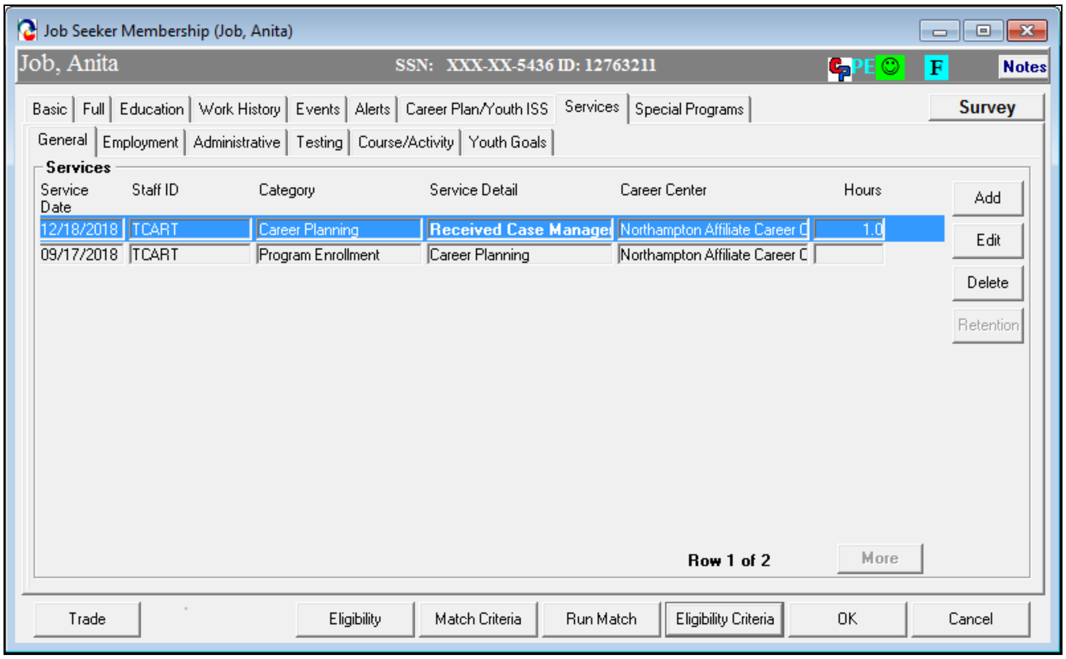




8. Click the **Services** tab.

Review the services.

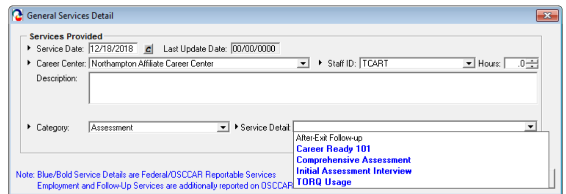
Services can appear in the **General**, **Employment**, **Testing**, and/or **Course/Activity** services sub-tabs.



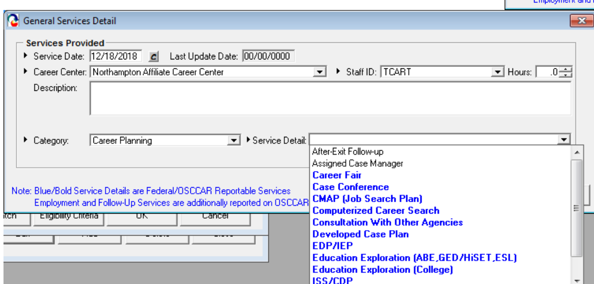
9. The following screens show some of the key **General** services that relate directly to **Career Planning**.

   Make sure **Notes** have been added to provide details of the services provided. (The **Notes** dates and the **Services** dates should correspond to each other.)

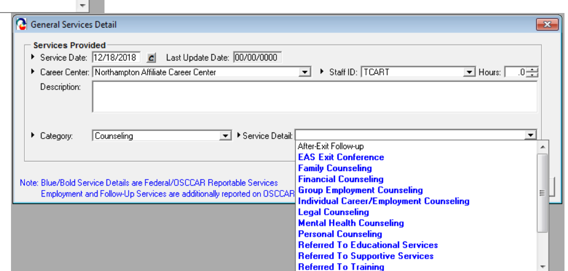
   This will help you, your fellow caseworkers, your managers, and any program monitors know that you provided the service listed.



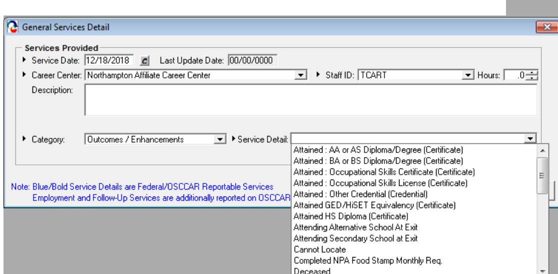
Assessment



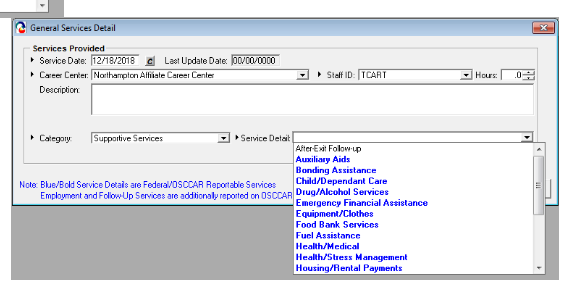
Career Planning



Counseling

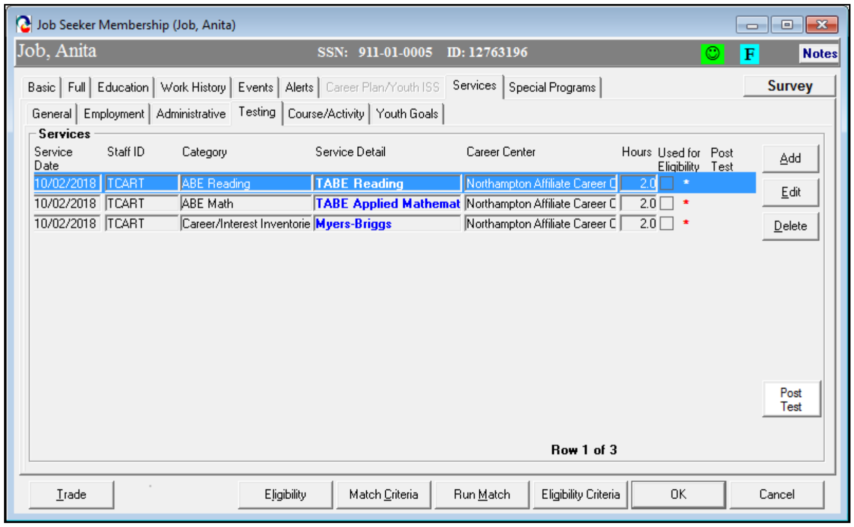


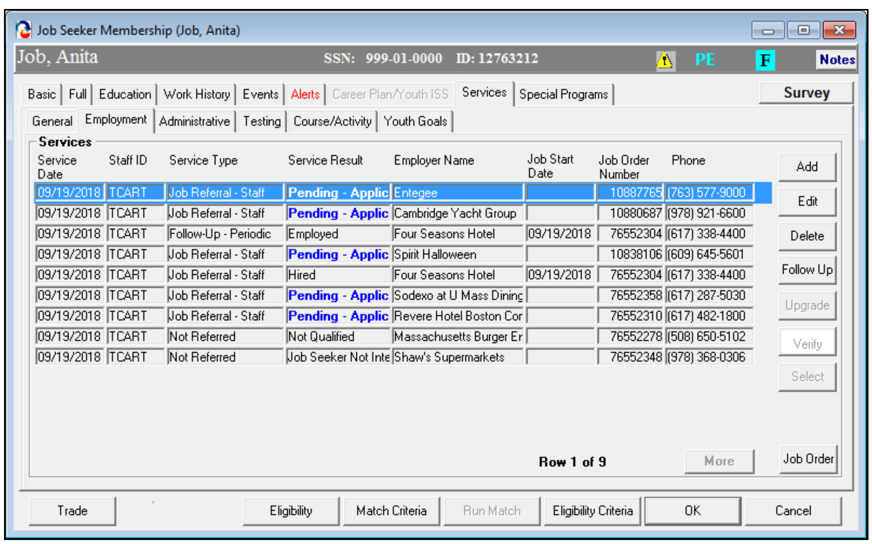
Outcomes/ Enhancements



Supportive Services

If employment and training are part of your career plan, services from the **Employment**, **Testing**, and/or **Course/Activity** sub-tabs will also need to be completed.





10. Click the **Close** button to return to the **Job Seeker Search** window.

11. Click the **Close** button to return to the MOSES **Main Menu** window.

Assign Job Seeker to Career Planning

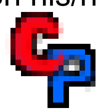
Overview

To be included in **Career Planning**, the Customer:

- Should be registered as a **Full** member, with all tabs and screens completed, *including*, if appropriate, the **Match Criteria** and/or **Program Eligibility** tab(s).

- Needs to have **Career Planning** from the **Programs** area on the **Basic** tab *checked* ☑ off.

When the Customer is successfully assigned a case worker, the following icon (a “**C**” over an “**P**”) appears on his/her membership.

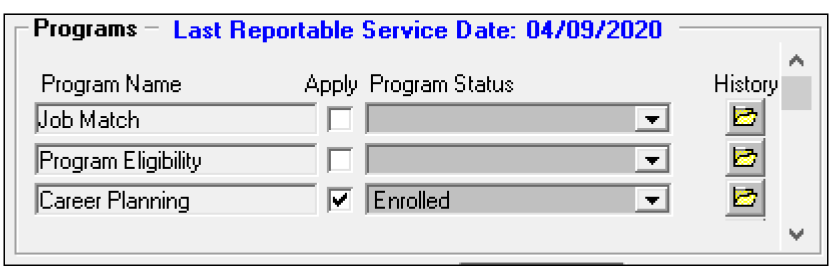


To Select Career Planning for a Customer

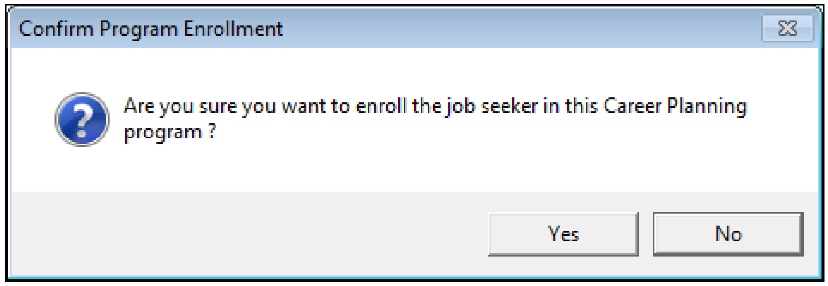
1. Open up your Customers record.

2. Click the **Apply** checkbox for **Career Planning**.

   This is in the **Programs** area of the **Basic** tab for the Job Seeker.

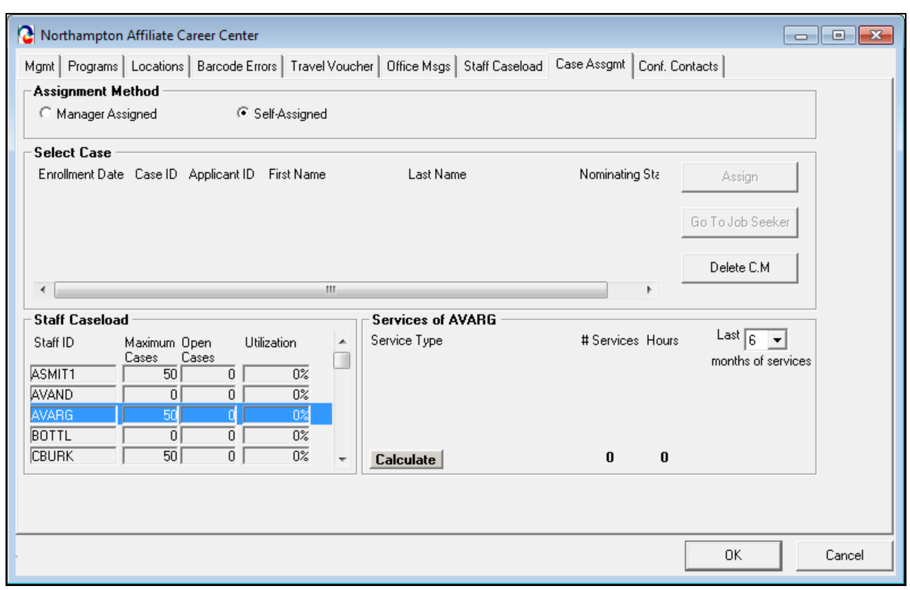


When MOSES asks you
"Are you sure you want to enroll this job seeker in this Career Planning program?"
click the **Yes** button.



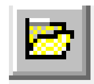
3. If your One-Stop Career Center has *selected* the **Self-Assigned** method for Career Planning, you will be the assigned case worker. You will be able to enter information in the **Case Plan** tab.
   You must refresh your view of the Customer's record to access the Career Plan tab. (*Another words, close and reopen the customer record*.)

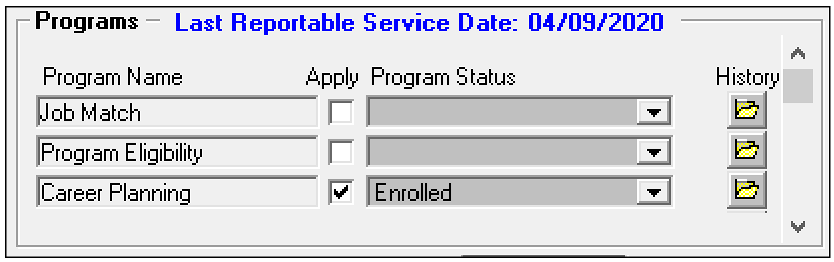
4. If your One-Stop Career Center has *selected* the **Manager-Assigned** method for career planning, you will have to nominate this Customer for Career Planning.
   You must *wait* until the manager responsible for Career Planning assigns the customers career plan to you.
   Only after that point will you be able to enter or edit information in the **Career Plan** tab.

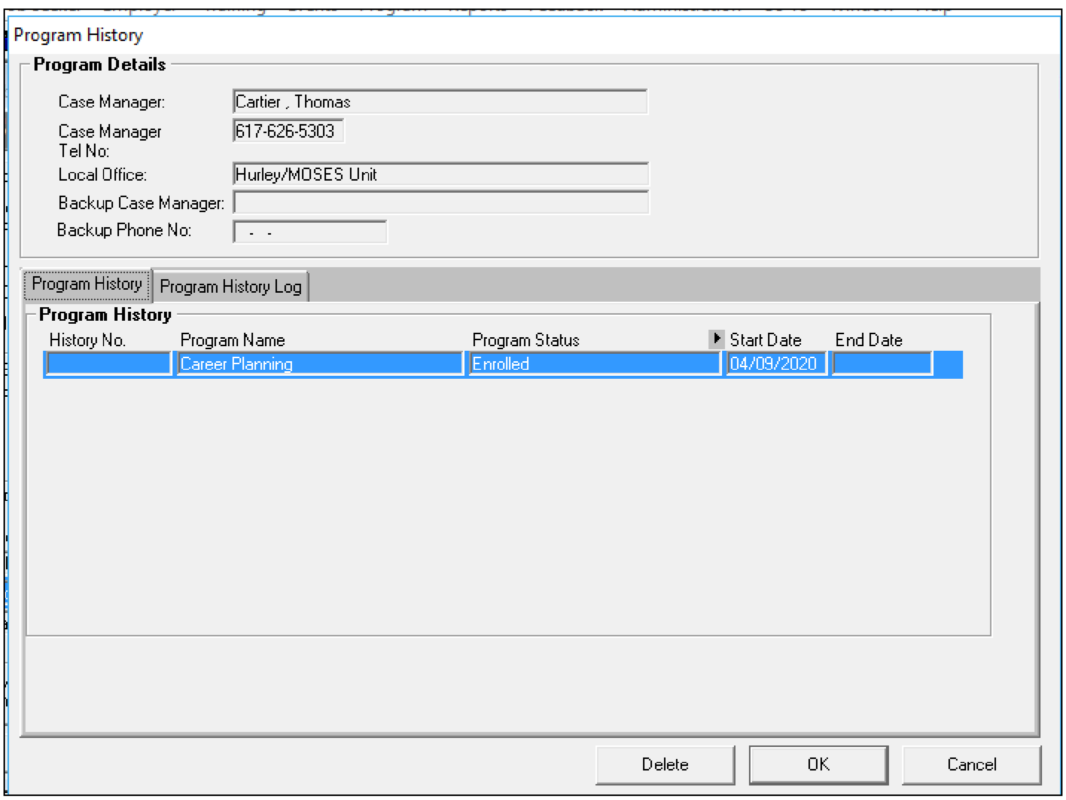


5. Once you have successfully enrolled the customer in Career Planning you will be assigned as the **primary caseworker**, this information will appear in the **Program History** folder for Career Planning.

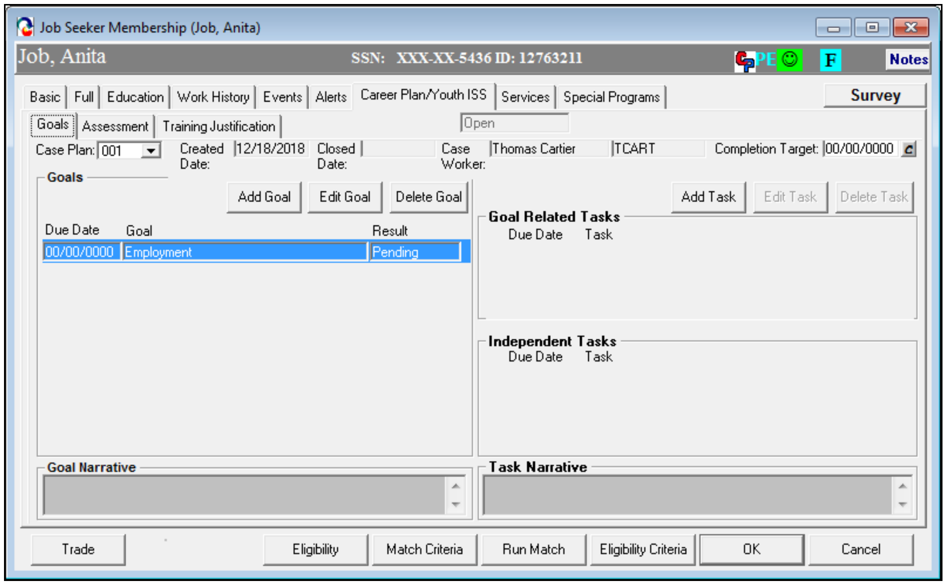
Click the **History** folder for **Career Planning** in the **Programs** area of the **Basic** tab.







6. This screen shows the **Career Plan** tab.



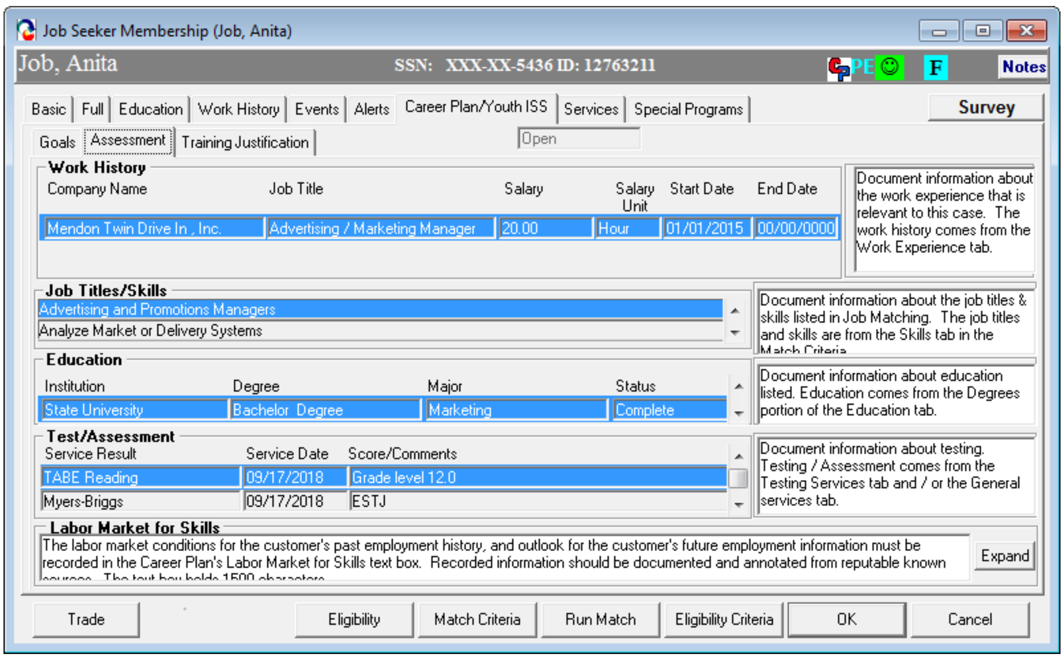
MOSES uses the date the caseworker was enrolled as the Created Date for the case plan. It also gives the full name and staff ID of the primary case worker.

Assessment

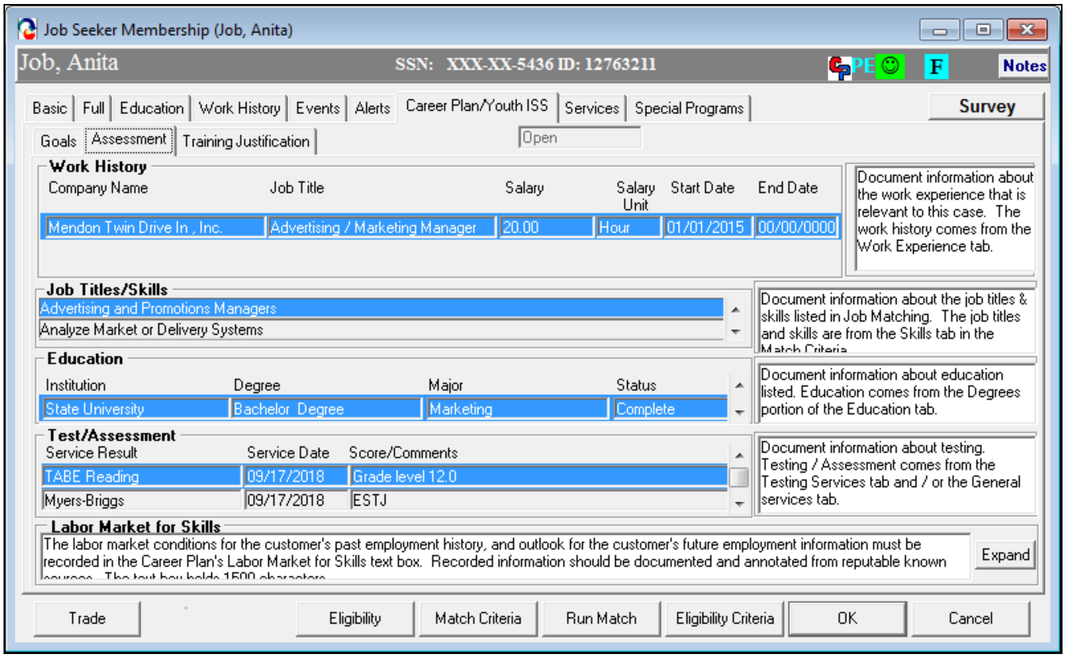
The Assessment Process

Customers who are in **Career Planning** need to be assessed. MOSES assists you by conveying into the **Assessment** sub-tab information already entered in MOSES.
This eliminates the need to enter information again or to constantly switch screens to find information.

1. Move to the **Assessment** sub-tab by clicking that label.



2. Note that the first four groups should be populated with information collected from the intake and assessment processes.



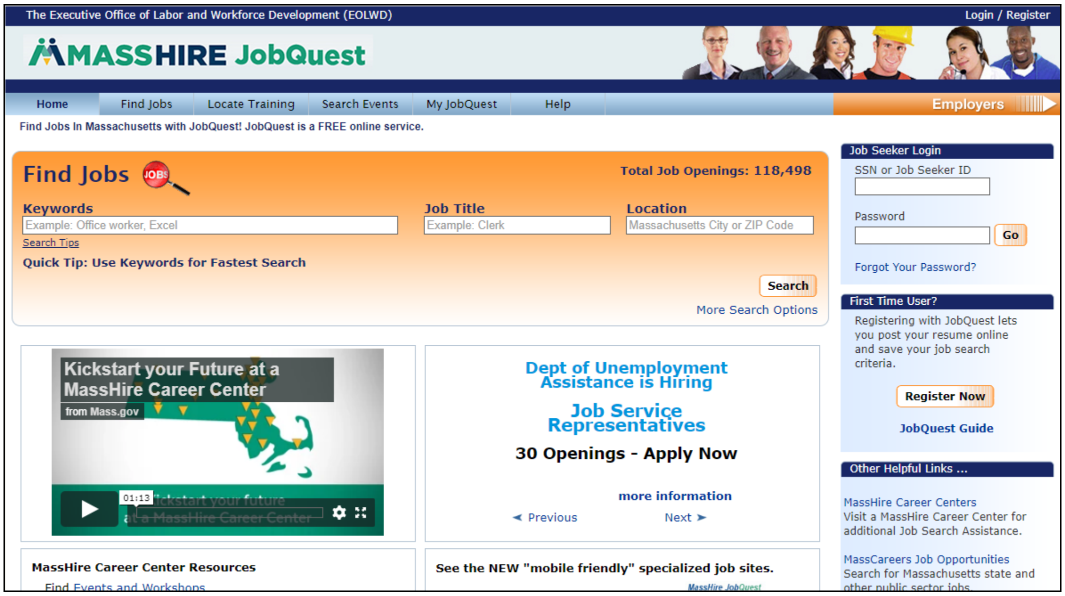
The **Work History** information comes from the Customer's **Work History** tab.

The **Job Titles/Skills** comes from the **Skill Set Summary** tab of Job **Match Criteria**.

The **Education** information comes from the **Degrees** portion of the **Education** tab. (This *only* shows Degrees. The License, Certifications, and Registrations section and Vocational Training area do not show here.)

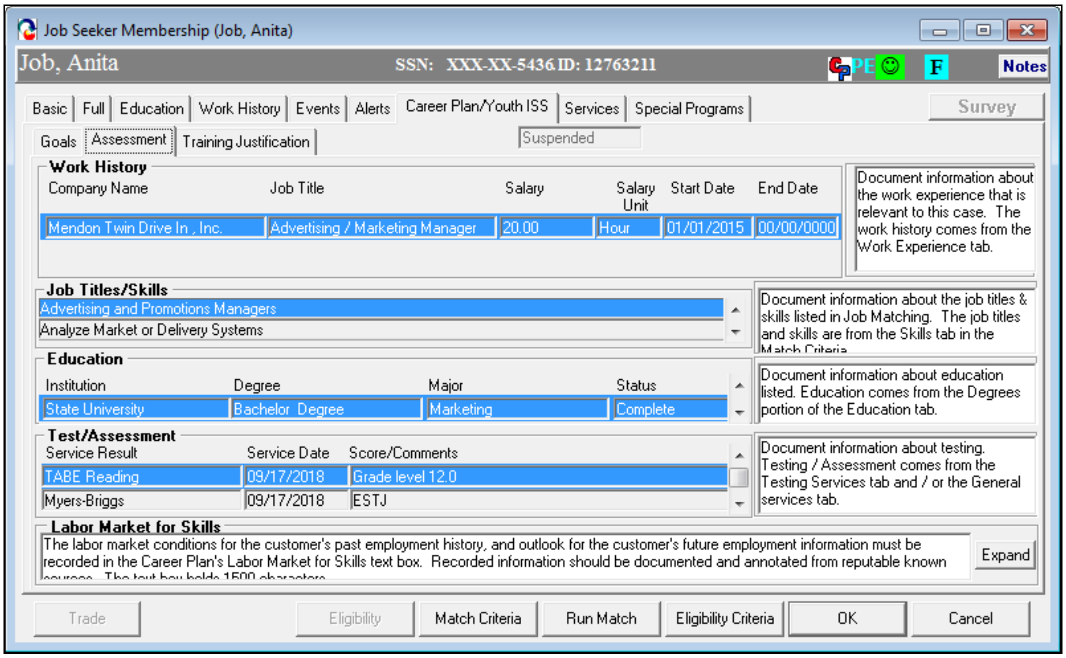
The **Test/Assessment** comes from the **Services tabs, General Services** and**, Testing** sub tabs.

If nothing appears in an area, it means that you may need to go to the appropriate tab or screen in MOSES and enter the data yourself.



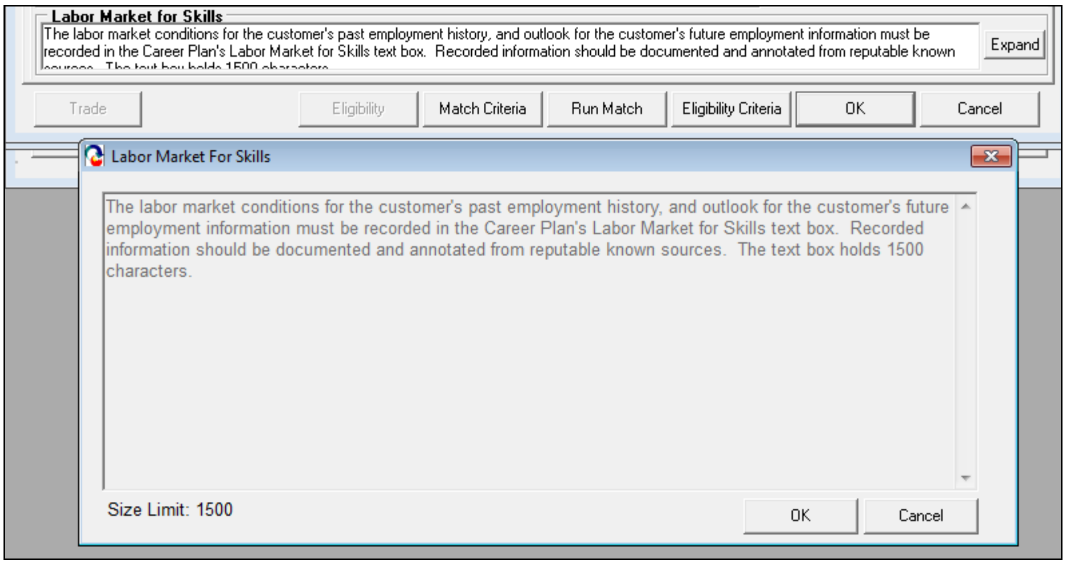
The caseworker's job will be easier if this information is entered at intake. With **MassHire Job Quest** (MJQ), the Job Seeker can enter and update this information on his or her own, while waiting for an appointment with the case worker.

3. Write notes / documentation in the boxes on the right about any aspect of the **Work History**, **Job Titles/Skills**, **Education**, and **Test/Assessment** groups that will affect the Job Seeker's case plan. This is an *optional* field, its usage is determined by your offices standard practice, the customer and if you feel something is omitted or needs explanation.



4. You need to manually enter information about how the person would fare in today's labor market holding his or her current toolbox of skills. *__It needs to be well documented__*.

   If the Customer needs training, you must be clear that the Customer would not hold *long-term, suitable employment* with their current skills. (**Note**: the **Expand** button will make entering information easier.)



In the **Labor Market for Skills** box list why this job seeker cannot find suitable employment with his or her current skills. *Quote sources*. Use Links, Massachusetts Career Information System for written information on occupations.
Use Links, Mass Stats for the most current statistics on occupations.
Demonstrate job seeking through want ads and other sources.

Use **MassHire Career Information System** (MCIS) for fairly clear interpretations of occupational statistics. Once you are in that web site, select **Occupations**, then choose the occupation you want. Several topics can help you, including **Wages**, **Outlook**, and **Employment**. You can use the copy (*highlight the text you want, then press CTRL+C at the same time*) and paste *(locate where you want to put the text, then press CTRL+V at the same time*) options. **Copy** and **Paste** are also available when you right click after highlighting the area.

Select **Mass Stats** or **LMI** for pure statistics on the occupation, industry, and/or area that interests the Job Seeker. Once you are in that web site, click the **Go** button, then choose the area of statistics and the geographic area that you need. The most likely area to explore would be Occupations. This information is the source data for MCIS, but it is in table format. This does not lend itself easily to the cut and paste option mentioned above.

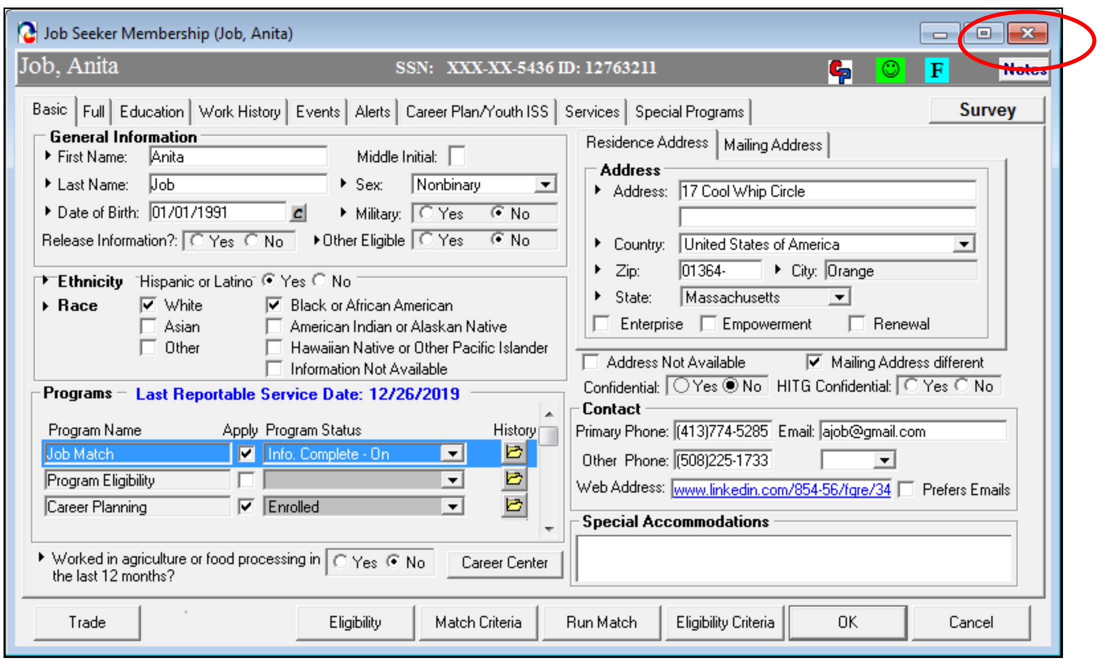
Notes

Notes

One of the key principles for staff providing career planning services is to keep accurate, up-to-date records, as required by your Career Center, and in conformance with appropriate program regulations.

When entering **Notes**, make sure you respect the Customer's right to privacy and confidentiality. Use professional discretion.

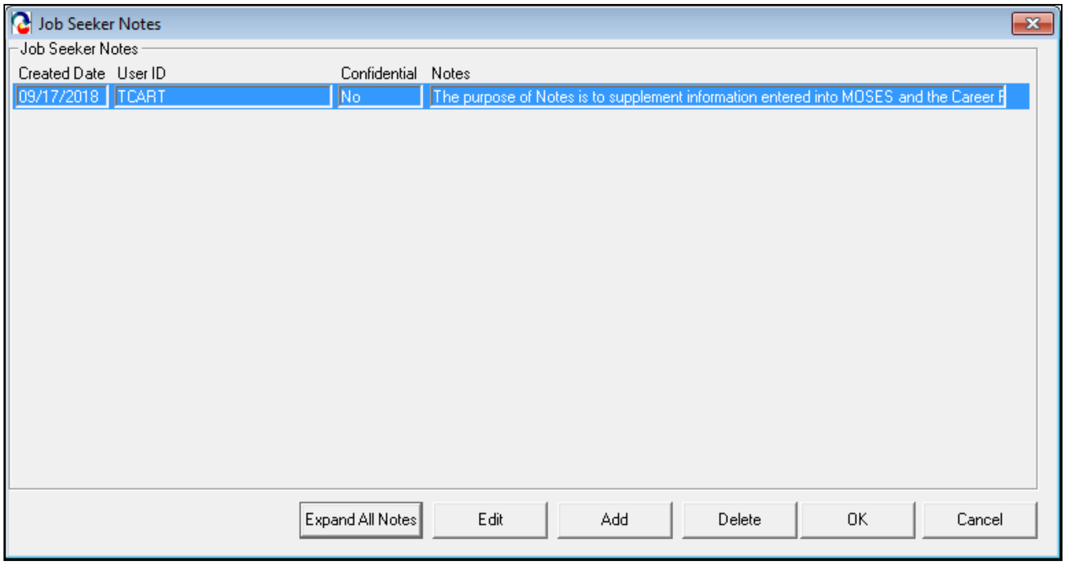
1. Click the **Notes** button to see the notes entered. You find this button on the top right corner of the header bar for the **Customer** record.

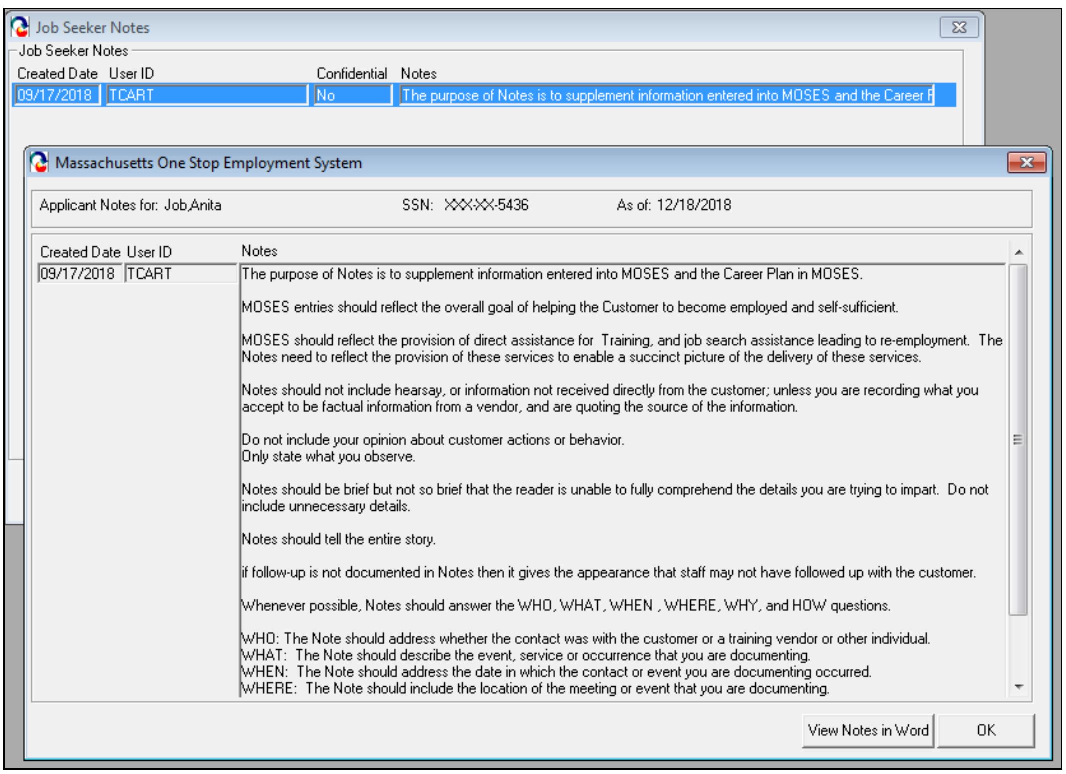


When notes are entered for a Customer, the **Notes** button turns **blue and bold**. This is a visual cue to tell you if notes are entered.

You can keep notes in two main places on the Customer record. They include: the **Notes** button, located on the header bar for the **Customer** record; and the **Detail boxes** provided in the **Service Detail** boxes (shown when you **Add** a new service or when you **Edit** an existing service). You do not need to put them in both places, unless that is your offices standard practice.

2. This brings up the **Notes** screen in MOSES.





3. Click the **Add** button to add a Note. Be clear and concise.

4. After you enter a note, click the **OK** button from the Job Seeker Notes window. This brings you back to Job Seeker Notes and simply posts the note to your view of the Job Seeker Notes. At this point it is not saved in the MOSES database.

5. Click the **OK** button from **Job Seeker Notes**.

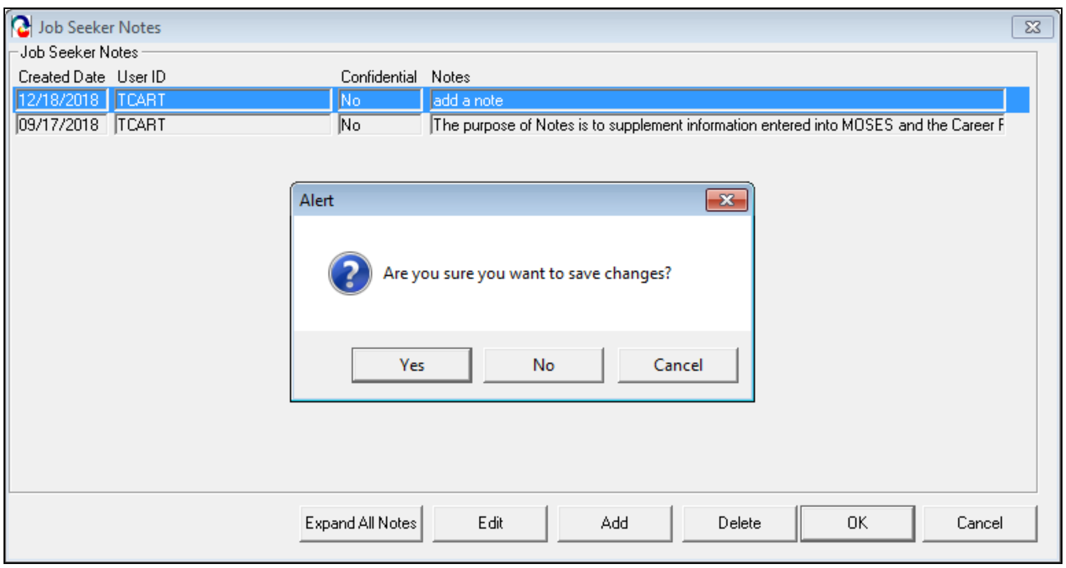
   Click the **Yes** button to save the note.

6. This brings up a prompt to enter a general service.

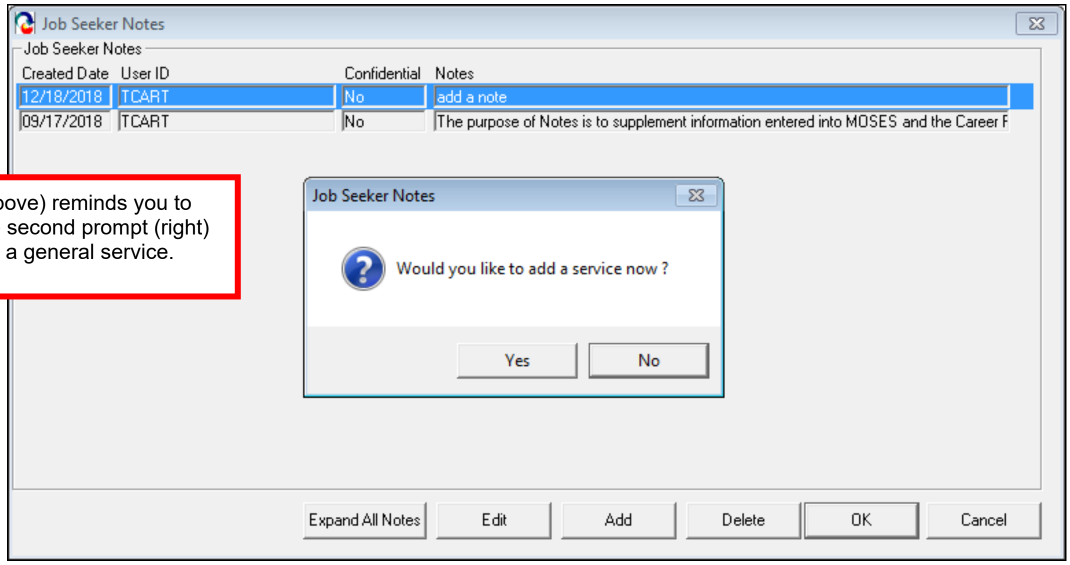
   If you click **Yes**, the **General Services Detail** appears.

   Enter the service and click the **Yes** button.

   Click the **OK** button or click the diskette icon to save your work.



The first prompt (above) reminds you to save the note. The second prompt (right) reminds you to add a general service.



7. Click the **Notes** button again.

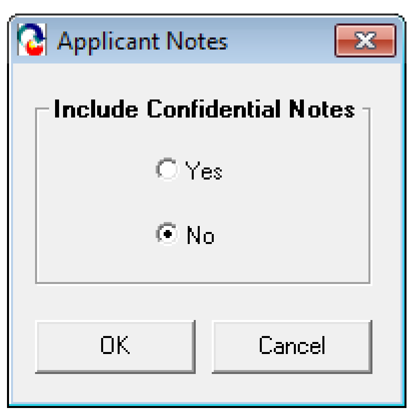
8. Click the **Expand All Notes** button to see all the notes at once.

9. If you want to view the notes in Word (for printing purposes), click the **View Notes in Word** button at the bottom of this screen.

   This will send all the notes to Word.

   You can choose to include confidential notes.

   The default is **No**. Click the **OK** button to see the notes in Word.



The information in gray is in the Header of the page.
This will appear on every page.
The notes themselves are brought into Word from MOSES using the Table feature of Word. This document may show the formatting symbols for tabs and hard returns. These formatting symbols will not print.
Any changes you make in Word will not migrate automatically back to MOSES.
You will need to copy from the Word document and paste it in MOSES. This is a good way to run spelling and grammar checks on your notes.

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Applicant Notes

Name: : Job,Anita

Applicant ID: 12763211

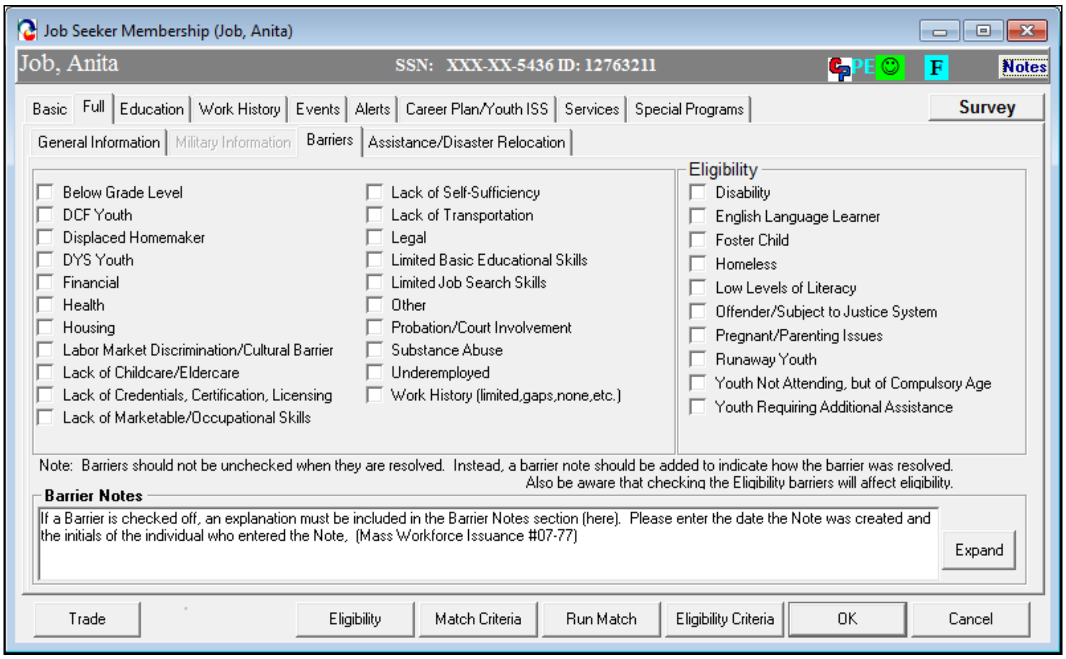
Date Printed: : 12/18/2018

Created Date	Created By	Notes	Confidential
12/18/2018	TCART	add a note	
09/17/2018	TCART	The purpose of Notes is to supplement information entered into MOSES and the Career Plan in MOSES. MOSES entries should reflect the overall goal of helping the Customer to become employed and self-sufficient. MOSES should reflect the provision of direct assistance for: Training, and job search assistance leading to re-employment. The Notes need to reflect the provision of these services to enable a succinct picture of the delivery of these services. Notes should not include hearsay, or information not received directly from the customer; unless you are recording what you accept to be factual information from a vendor, and are quoting the source of the information. Do not include your opinion about customer actions or behavior. Only state what you observe. Notes should be brief but not so brief that the reader is unable to fully comprehend the details you are trying to impart. Do not include unnecessary details. Notes should tell the entire story. if follow-up is not documented in Notes then it gives the appearance that staff may not have followed up with the customer. Whenever possible, Notes should answer the WHO, WHAT, WHEN, WHERE, WHY, and HOW questions. WHO: The Note should address whether the contact was with the customer or a training vendor or other individual. WHAT: The Note should describe the event, service or occurrence that you are documenting. WHEN: The Note should address the date in which the contact or event you are documenting occurred. WHERE: The Note should include the location of the meeting or event that you are documenting. WHY: The Note should describe why the customer is being contacted, or it should be obvious to the reader why the Note is being included. HOW: The Note should address whether the contact was in person, by telephone, via email, or another method.	

Barriers

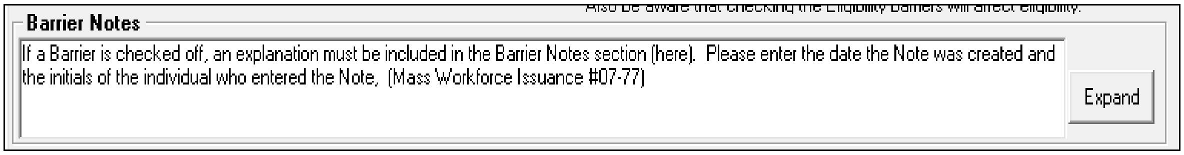
Use the **Barriers** sub tab on the **Full** tab to accurately record the things that impact the Customer's potential success in training, job search, and / or sustained employment.

1. Click the **Barriers** tab to enter any barriers to employment and/or training.

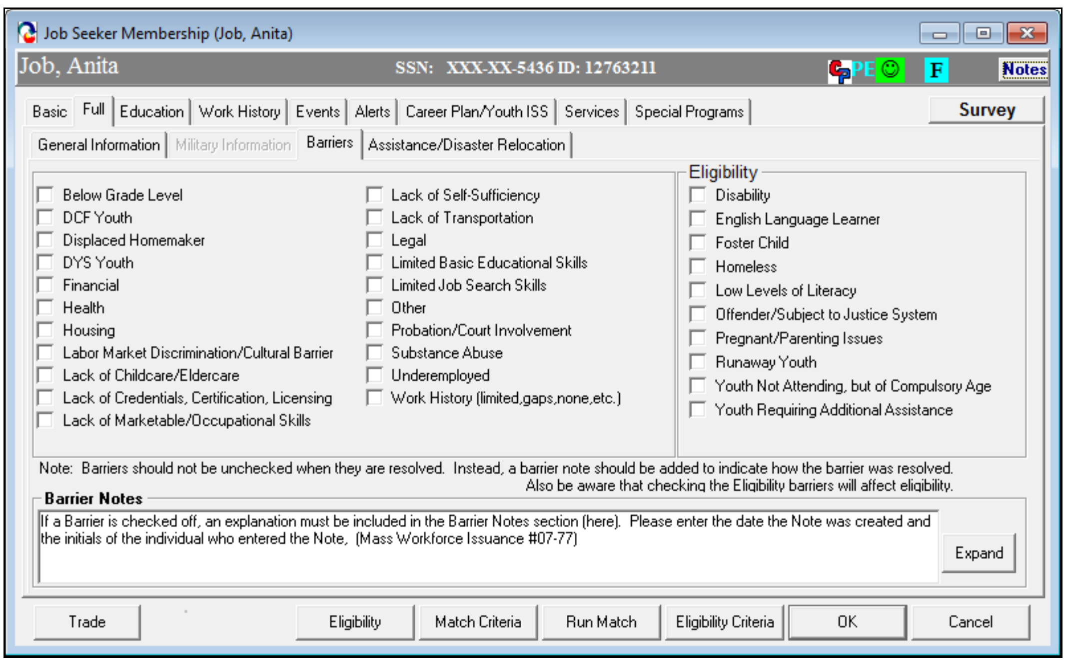


2. The list of **Barriers** is shown.

3. You **must** enter the reason why each barrier was checked and how it will be addressed. You need to be able to justify the selection of any barrier selected.
Use the Barriers Notes box to enter the information.



4. Do not ***uncheck*** or ***erase*** the **Barrier**, if the barrier no longer exists. This totally erases the barrier from MOSES.
Simply add a sentence in Barrier Notes about how the barrier was addressed / resolved/ canceled.



Remember, as in all notes and explanations entered into MOSES, use a professional manner. Make sure you wouldn't mind that the information might inadvertently become public. You need to be brief and objective. You will record a suggested plan of action for each barrier selected. You may not be the person implementing that plan.

(Excerpts *from* Appendix C : Barriers)

Barriers (Employment Barriers)

Potential barriers to employment that the customer has self-identified.

(*For more guidance please see WIA Issuances & WIOA Issuances*).

Full Tab – Barriers (Employment Barriers)

Term	Definition
Below Grade Level	**BASIC SKILLS DEFICIENT, BASIC LITERACY SKILLS DEFICIENT** *– an individual youth or adult who computes or solves problems, reads, writes, or speaks English • at or below their age appropriate grade level (if less than ninth grade age), or • at or below grade level 8.9 on a generally accepted standardized test or a comparable score of a criterion-referenced test; or • is unable to compute or solve problems, read, write or speak English at a level necessary to function on the job, in the individual's family or in society. **This definition was adopted by the WIA Youth Subcommittee and approved by the WIA Steering Committee, giving further definition to the one found at §101(4).*
DCF Youth	This Non-Eligibility Barrier for Youth is a sub-set of the **Foster Child** Eligibility Barrier. If the **DSS Youth** Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**DSS Youth**) must be listed and what criteria were used to make this determination and where this information is located must be included. Also, please enter the date the note was created and the initials of the individual who entered the note. **DSS Youth** can be documented by Telephone Verification using the Telephone Verification Form, as per WIA Issuance 05-74.

Full Tab – Barriers (Employment Barriers)

Term	**Definition**
Displaced Homemaker	**DISPLACED HOMEMAKER –** §101(10); §663.120 - an individual who has been providing unpaid services to family members in the home and who; (A) has been dependent on the income of another family member but is no longer supported by that income, and (B) is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.
DYS Youth	**DYS Youth:** This Non-Eligibility Barrier for Youth is a sub-set of the **Foster Child** Eligibility Barrier. If the **DYS Youth** Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**DYS Youth**) must be listed and what criteria were used to make this determination and where this information is located must be included. Also, please enter the date the note was created and the initials of the individual who entered the note. **DYS Youth** can be documented by Telephone Verification using the Telephone Verification Form, as per WIA Issuance 05-74.
Financial	To be defined by the local workforce area. (*Some examples may be Bankruptcy , and Foreclosures. But may also be defined as enrolled in Unemployment Insurance and collecting half a paycheck.)*
Health	To be defined by the local workforce area. (*Self-explanatory.*)
Housing	To be defined by the local workforce area. (Can be *lacks housing and shelter. May include Public housing recipient. Includes Homeless as well.*)
Labor Market Discrimination / Cultural Barrier	To be defined by the local workforce area. (*This can include Age, Gender, Race, Disability, Ethnicity or other protected classes.)*
Lack of Childcare / Eldercare	To be defined by the local workforce area. (*Self-explanatory.*)

Full Tab – Barriers (Employment Barriers)

Term	**Definition**
Lack of Credentials, Certification, Licensing	To be defined by the local workforce area. (*The individual has been performing a job function without mandatory Credentials, Certifications and / or Licensing and their employment has been terminated, and now lacks the required qualification to get employed*.)
Lack of Marketable / Occupational Skills	To be defined by the local workforce area. (*It can be a lack of transferable skills. Or their industry / occupation has gone away*.)
Lack of Self-Sufficiency	**Lack of Self-Sufficiency –** The local board must set the criteria for determining whether employment leads to self-sufficiency. At a minimum, such criteria must provide that self-sufficiency means employment that pays at least the lower living standard income level. Self –sufficiency for a dislocated worker may be defined in relation to a percentage of the layoff wage. §663.230
Lack of Transportation	To be defined by the local workforce area. (*Self-explanatory.*)
Legal	To be defined by the local workforce area. (*Can include CORI and SORI issues. As well as Bonding.)*
Limited Basic Educational Skills	To be defined by the local workforce area. (*Self-explanatory.*)
Limited Job Search Skills	To be defined by the local workforce area. (*Self-explanatory.*) *(This has included customers with a lack of computer skills, job search experience and / or internet / social media skills.)*
Other	To be defined by the local workforce area. (This is *a placeholder for new barriers that come up. It has been used for example the Springfield Tornado enrollees, and the Hurricane Maria registrants*.)

Full Tab – Barriers (Employment Barriers)

Term	**Definition**
Probation / Court Involvement	To be defined by the local workforce area. (*Self-explanatory.*) (*Can include CORI and SORI issues. As well as Bonding.)*
Substance Abuse	To be defined by the local workforce area. (*Self-explanatory.*) *(Can include any type of substance abuse.)*
Underemployed	**UNEMPLOYED INDIVIDUAL** – an individual who is without a job and who wants and is available for work. §101(47) (*This has been used to address individuals who are working, but in positions that are below their skills, capabilities, work experience and / or education.)*
Work History (limited, gaps, none, etc…)	To be defined by the local workforce area. *(This has been used for people with no or little work experience (like youth) to job hoppers to customers who have a long work history with one employer or industry.)*

<u>Barriers (Eligibility Barriers)</u>

Potential Employment Barriers that may result in **Eligibility** into various federally funded programs.
They are identified as **Eligibility Barriers**.
Documentation to substantiate the customer's claim of eligibility is required (*if this Eligibility Barrier is being used for Eligibility*); see Issuances for more detailed instructions.

Full Tab – Barriers (Eligibility Barriers)

<u>Term</u>	**<u>Definition</u>**
Disability	**DISABILITY** – §101(17) - an individual with any disability (as defined in section 3 of the Americans with Disabilities Act of 1990 (42 U.S.C. 12102)). (*This Barrier should coincide with any disability identified on the Full tab*.)
Foster Child	**FOSTER CHILD** – any youth under the age of eighteen (18) who is placed into substitute care under the legal responsibility of the Massachusetts Department of Social Services (DSS). The term "substitute care" means the provision of planned, temporary twenty-four hour a day care when the parent or principal caretaker is unable or unavailable to provide care on a daily basis. "Substitute care" encompasses the provision of foster care, community residential career and supervised independent living (110CMR 2.00(49)). This definition of foster child may include children who are: (A) receiving services from the Massachusetts DSS pursuant to a voluntary placement agreement; or (B) placed in the custody of the Massachusetts DSS through a court order (including a court order arising and of a Child in Need of Services (CHINS) petition) or through an adoption surrender.

Full Tab – Barriers (Eligibility Barriers)

Term	**Definition**
Homeless	**HOMELESS** – pursuant to the Stewart B. McKinney Homeless Act, an individual who lacks a fixed, regular, and adequate nighttime residence. It also includes persons whose primary nighttime residence is either: (A) a supervised publicly or privately operated shelter designed to provide temporary living accommodations (including welfare hotels, congregate shelters, and transitional housing for the mentally ill), (B) an institution that provides a temporary residence for individuals intended to be institutionalized, or (C) a public or private place not designed for, or ordinarily used as, a regular sleeping accommodations for human beings.
Low Levels of Literacy	**BASIC SKILLS DEFICIENT, BASIC LITERACY SKILLS DEFICIENT** *– an individual youth or adult who computes or solves problems, reads, writes, or speaks English • at or below their age appropriate grade level (if less than ninth grade age), or • at or below grade level 8.9 on a generally accepted standardized test or a comparable score of a criterion-referenced test; or • is unable to compute or solve problems, read, write or speak English at a level necessary to function on the job, in the individual's family or in society. **This definition was adopted by the WIA Youth Subcommittee and approved by the WIA Steering Committee, giving further definition to the one found at §101(4).*

Full Tab – Barriers (Eligibility Barriers)

Term	Definition
Offender / Subject to Justice System	**OFFENDER** –any adult or juvenile who has been subject to any stage of the criminal justice process for whom services under WIA may be beneficial or who requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction. §101(27)
Pregnant / Parenting Issues	**PREGNANT/PARENTING YOUTH** – a youth who is pregnant or providing custodial care for one or more dependents under age 18.
Runaway Youth	**RUN-AWAY YOUTH** – pursuant to the Runaway and Homeless Youth Act, an individual under 18 years of age who absents himself or herself from home or place of legal residence without permission of the parent(s) or legal guardian.
Youth Not Attending, but of Compulsory age	**YOUTH NOT ATTENDING** – a youth not attending school, but of compulsory age.
Youth Requiring Additional Assistance	**YOUTH REQUIRING ADDITIONAL ASSISTANCE** to complete an educational program, and / or to secure and hold employment (the sixth barrier). The definition of a youth that requires additional assistance will include an individual that: (A) is one or more grade levels below their age-appropriate grade level;* or has a disability, including a learning disability;* or (B) requires additional assistance as defined by the youth council and approved by the local board. (Long term unemployment may not be used as a criterion to meet this definition of eligible youth.)*

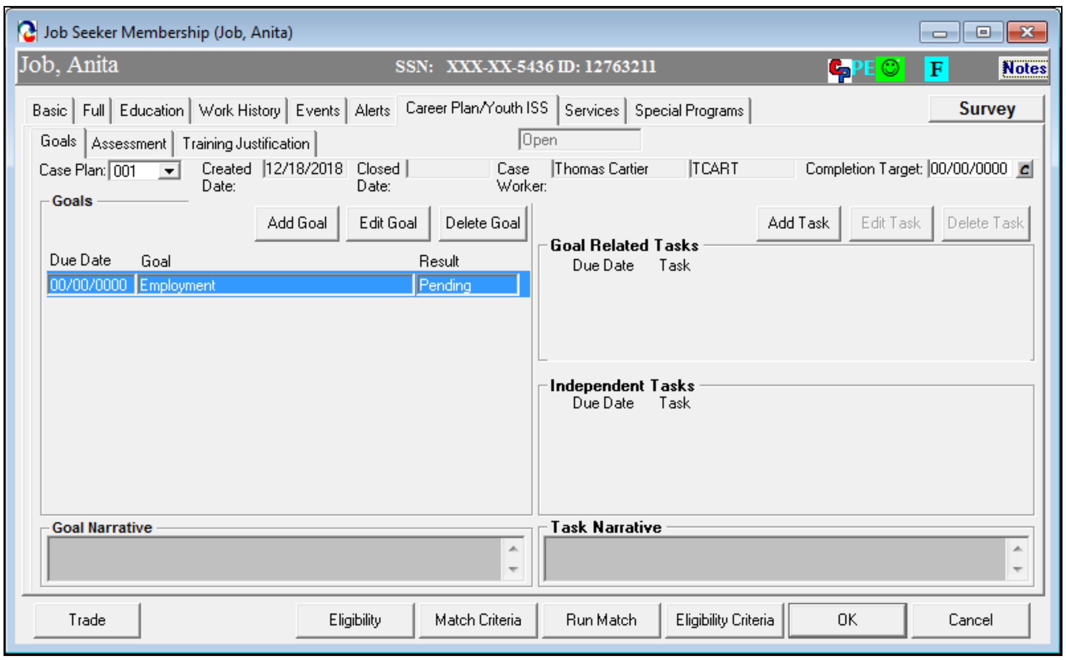
Goals and Tasks

Goals

An effective goal focuses primarily on goals rather than activity.
It identifies where you want to be, and, in the process, helps determine where you are.
Staff need to accurately record the broad aims that will help the Customer become gainfully employed in the **Goals** tab.

1. This screen shows the **Career Plan / Youth ISS** tab.

Notice that all the available buttons, the Career Plan and Employment/Completion Target fields are enabled.



MOSES uses the date the case worker was assigned as the Created Date for the case plan. It also gives the full name and staff ID of the primary case worker.

Employment is an automatic shell of a goal assigned for all customers receiving career planning services.
You can delete this goal and establish other appropriate goals for customers receiving services. Make sure you cover all the goals needed for your Customer.

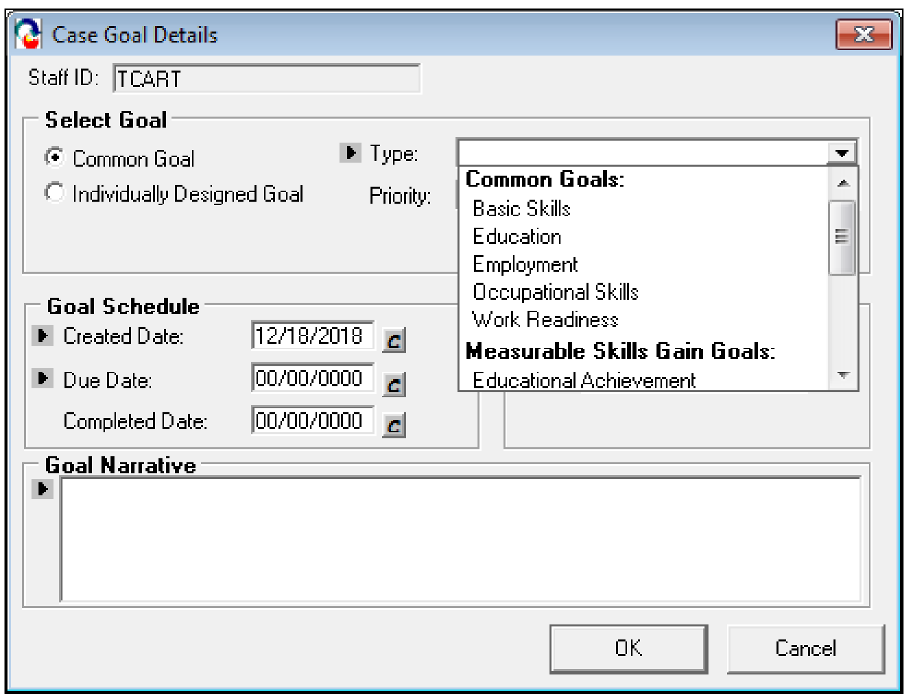
No goals can be entered with a Created Date that is before the date the Customer was enrolled in Career Planning and assigned a caseworker. You cannot enter a Created Date prior to the date you were assigned as the primary case worker.

2. Highlight the existing employment goal.

3. Click the **Edit Goal** button.

You can choose five types of **Common goals**:

Basic Skills, Education, Employment, Occupational Skills, *or* Work Readiness.



Employment is an automatic shell of a goal that is assigned for all customers receiving career planning services. You can delete this goal and establish other appropriate goals for customers receiving other services. Make sure you cover all the goals needed for your Customer.

Common Goals fall into five basic categories:

- **Basic Skills**: the training to obtain basic educational credentials such as ABE, GED, ESOL, or life skills, such as budgeting, time management, etc.
- **Education**: the continuation of education or for customers having an educational goal.
- **Employment**: the aim to obtain work in a career that will sustain the customer and his or her dependents, without redress to public subsidies.
- **Occupational Skills**: the formal training needed to obtain the skills needed for the career chosen. Examples of this are *computer programming, accounting, carpentry, nursing skills*.
- **Work Readiness**: the need to develop skills needed to find work and to stay in the job once obtained.
  Examples include *learning to interview, developing a successful resume,* and *how to conduct a job search, among others*.

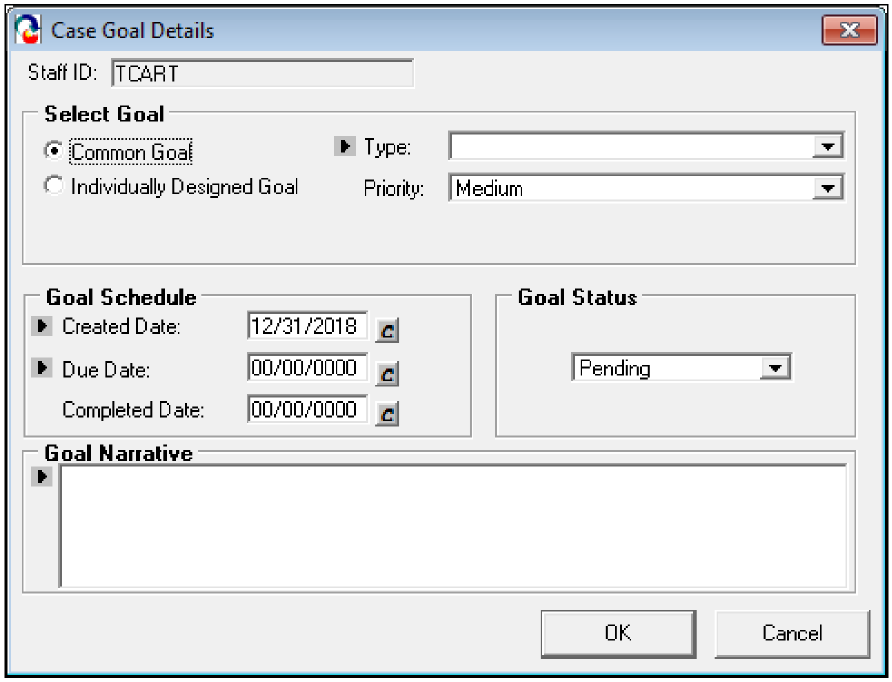
Individually Designed Goals are those that don't directly fall into the five **Common Goal** areas, but are needed to support this customer's career plan.
These goals can involve things such as ensuring that transportation is always available or that the customer eliminates habits that contradict the case plan. You must provide a label for this goal.
You have 100 characters available in the box..

There are also **Measurable Skills goals** for WIOA Title I customers.
These are already filled out and just need a Due Date.

There are also **Benchmark goals** for Trade customers.
These are already filled out and just need a Due Date.

4. Remember to check the goal's **Created Date**.

It cannot be before the date the case was assigned to you.



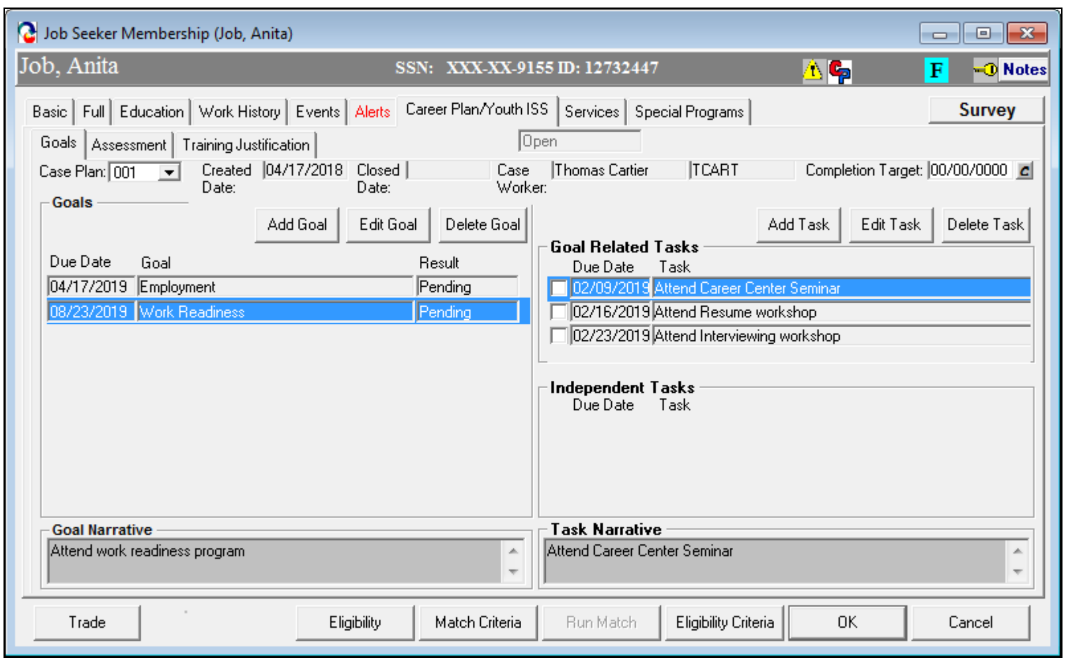
5. Enter a realistic **Due Date** for the Customer to achieve the goal.

6. Enter text about the goal in the **Goal Narrative** box, so all people reviewing this case (including yourself) know exactly what will be achieved. The type or label of the goal is not enough.

Tasks

Tasks break down the overall **Goals** into smaller pieces. This gives the outline of the duties and activities that the Customer needs to take in order to achieve / complete his or her goals.
Tasks should relate directly to an existing goal, or they can be independent of any **Goals**.
Use **Tasks** if the Customer needs a finer set of instructions for how to achieve their **Goals**.

1. This screen shows a completed **Goals** tab. Notice that the **Goal Narrative** and the **Task Narrative** show the text for the highlighted goal and task.

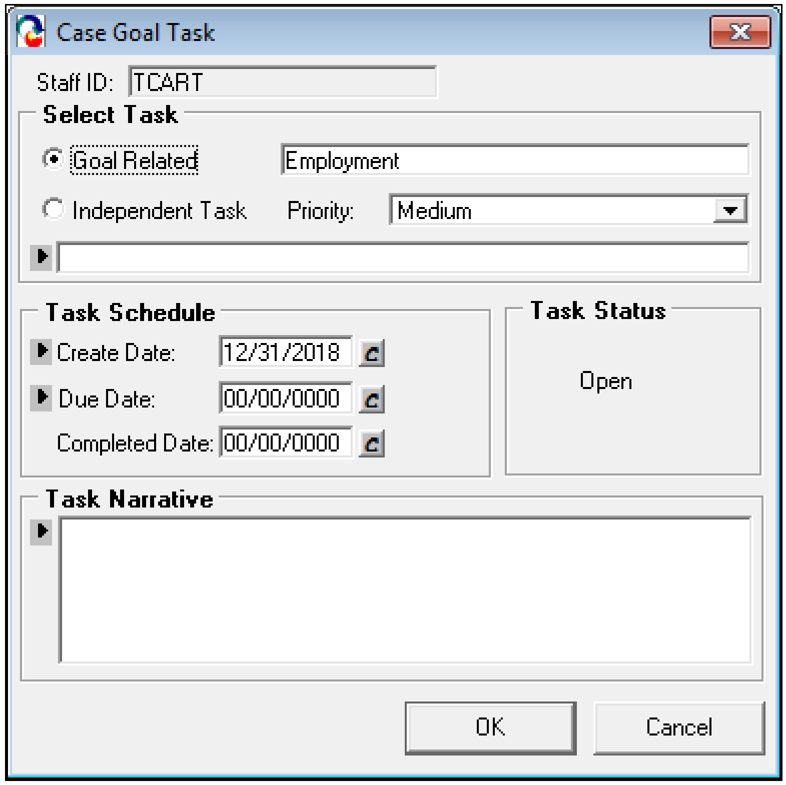


2. Highlight the **Goal** where you want to add a task, then click the **Add** or **Edit Task** button.

3. The **Task** needs to be related to the goal it supports.
If the correct goal does not appear in the drop down list for the **Goal Related Task**, cancel that task and highlight the proper goal.

4. If this is a **Task** that stands on its own, without relation to an existing goal, click the **Add Task** button.

Select the **Independent Task** radio button.



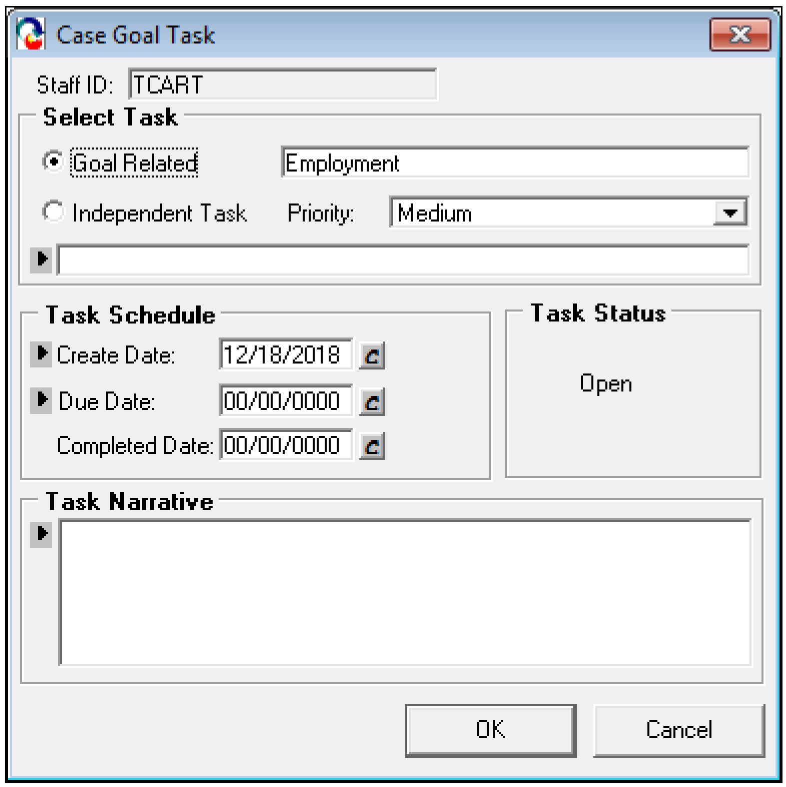
Enter a description in the **Task Narrative** box describing this **Independent Task**.

5. The Career Plan Goal Task screen looks largely the same as the **Case Goal task** screen.

All the same requirements apply with one exception.

You **must** provide a label for this task, whether it is **Goal Related**, or an **Independent Task**.

Remember to document the exact nature of the task and how the Customer should accomplish it. This will help any one reviewing the career plan (including yourself) in the future.



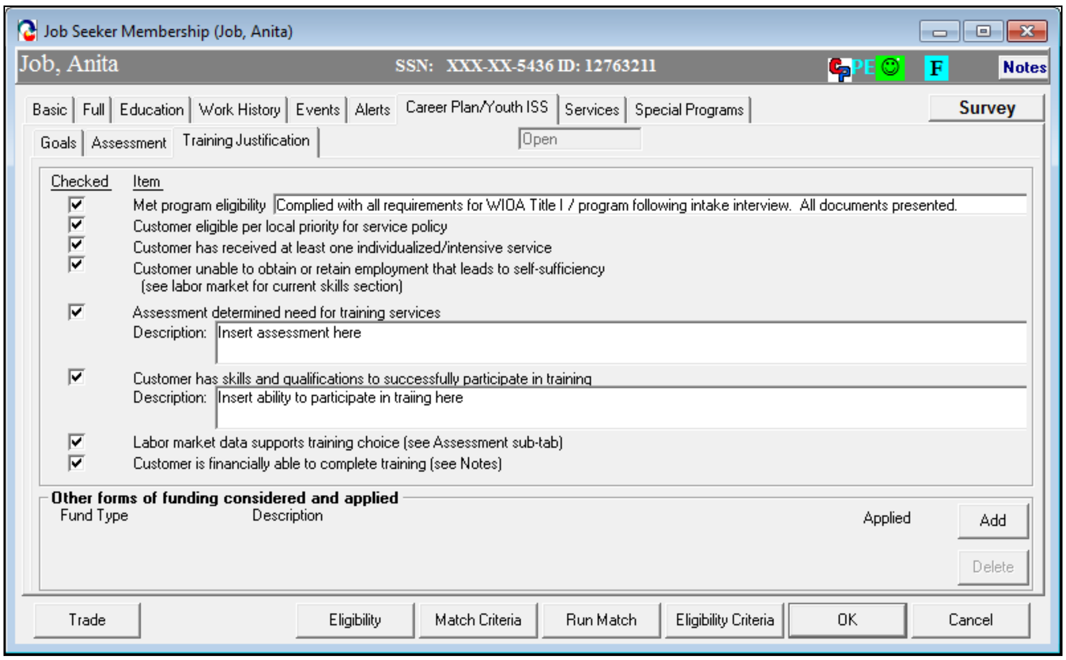
MOSES assigns all **Goal Related** tasks to the Goal that was highlighted before you clicked the **Add Task** or **Edit Task** buttons.
Tasks can relate to any **Common Goal** created, to any **Individually Designed Goal**, or can be totally independent of any created goal.
The last group appears in the **Independent Tasks** portion of the screen.

If you have erroneously assigned a task to a goal, the best practice is to delete it, highlight the correct goal, and re-create the task from the correct goal.

Training Justification

If you and the Customer decide that training is appropriate, then you need to complete the **Training Justification** sub-tab of the **Career Plan** tab. This will be used by all people (managers and monitors) who review the plan and make sure that you and the Customer have explored all available options, including going to work right away.

1. Click the **Training Justification** sub-tab of the **Career Plan** tab to enter why you have selected training as an option for this Customer.



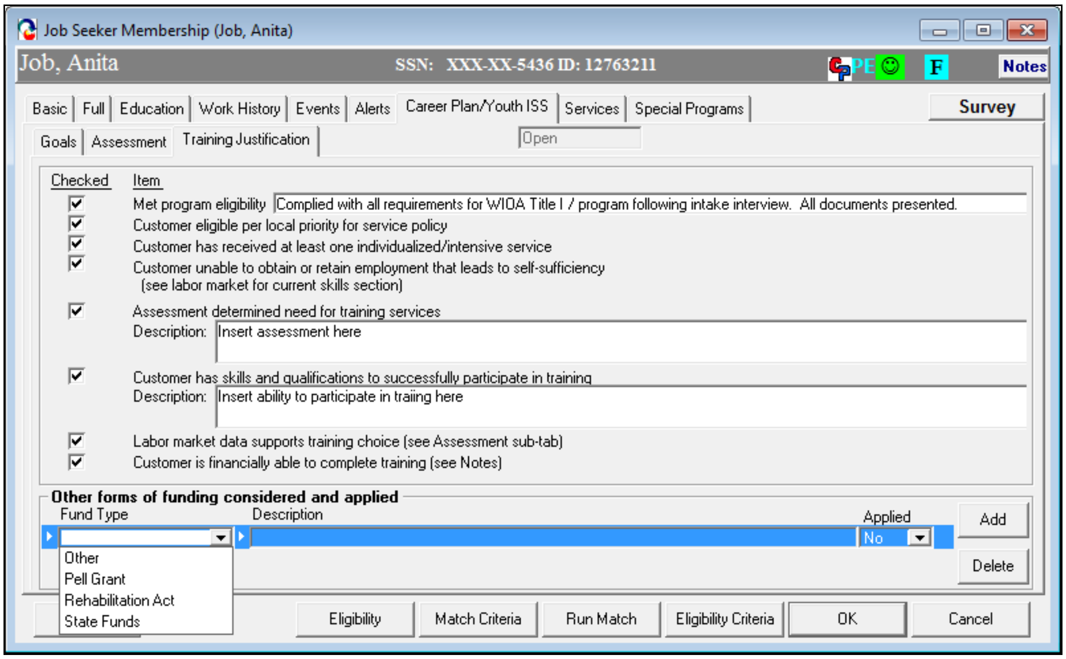
2. Some items checked will bring up a text box.

   The reason why you checked the text box must be written in this box.

   Managers and monitors will review this information.

3. Click the **Add** button for **Other forms of funding considered and applied**.

You **must** complete the two required fields :
Fund Type and **Description**.
The default for the **Applied** field is “**No**”.
Make sure you change the answer to “**Yes**”, when appropriate. Add as many types of other funding as considered.



Caseload Management

Manage Your Cases through MOSES

Overview

MOSES provides a way for you to look at all your assigned cases.

Access this through the **Main Menu** bar, **Job Seeker**, **Caseload Management**.

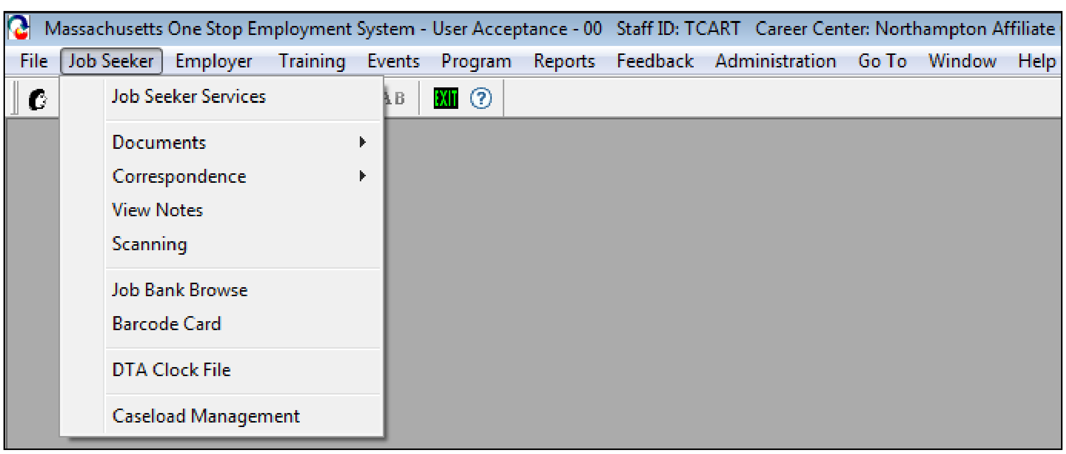
In addition, you can add ticklers to help you organize your cases, and view all cases where you have been assigned as a back-up worker.

View Your Assigned Cases

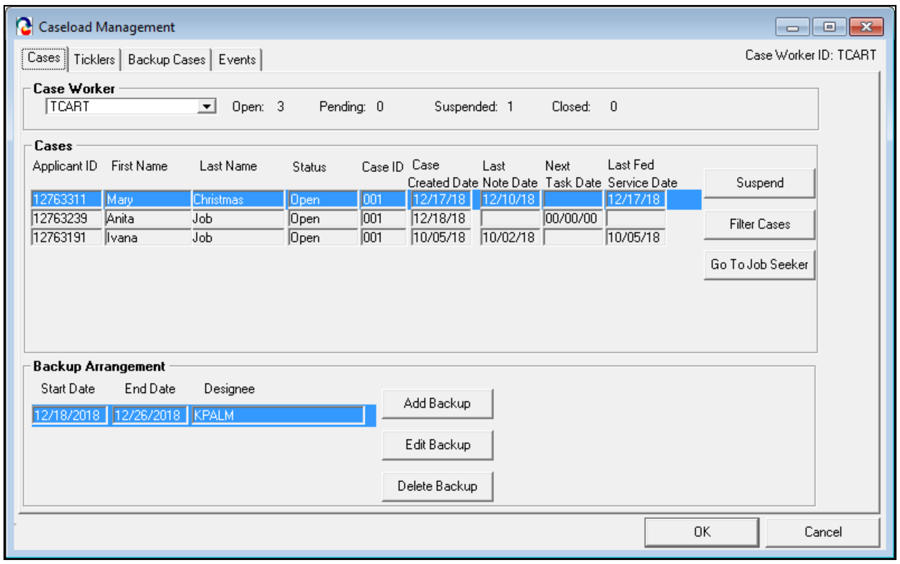
While you can look at each of your cases individually, the **Caseload Management** option from the **Job Seeker** listing on the Main Menu bar allows you to see all your cases at once.

1. On the **Main Menu** bar, click on **Job Seeker**.

2. Now click on **Caseload Management**.
   This brings you to the place where you can manage your cases using MOSES.

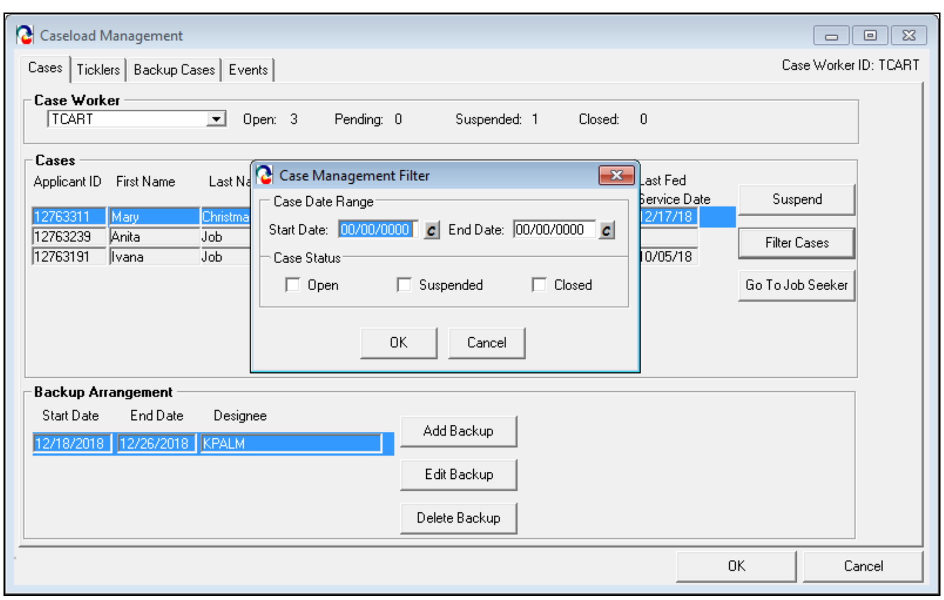


3. You come to the **Caseload Management** screen, with the first tab labeled: “**Cases**”.
   This is where you can see all the *open* cases you have been assigned, including the Applicant ID, Case Id, the Case Created Date, the last date a Note was entered, the date for the earliest uncompleted task and the last time a federal service was provided.



4. After viewing the listings, three buttons give you options in the **Cases** portion of this tab: **Suspend**, **Filter Cases**, or **Go To Job Seeker**.

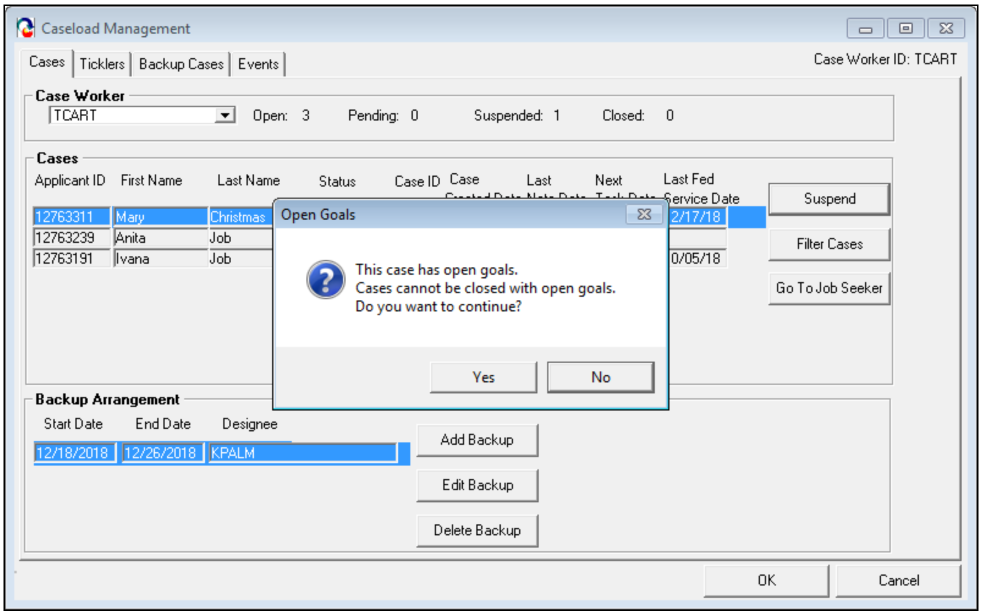
5. Click the **Filter Cases** button.



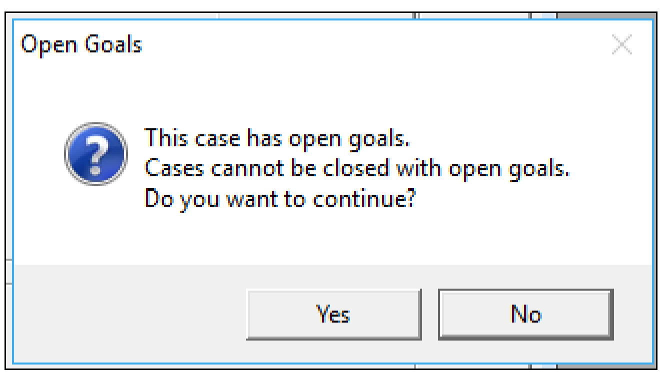
6. You may choose your **Cases** view by changing the **Start Date**, the **End Date**, the **Case Status**, *or* any combination of these fields.

Remember you can sort the cases listed on this tab by right clicking in the field where you want to sort, and choosing Ascending or Descending.

7. You can **Suspend** the highlighted case.



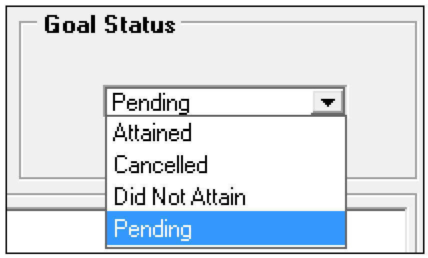
Note: the pop up.
"*This case has open goals.*
Cases cannot be closed with open goals.
Do you want to continue? "



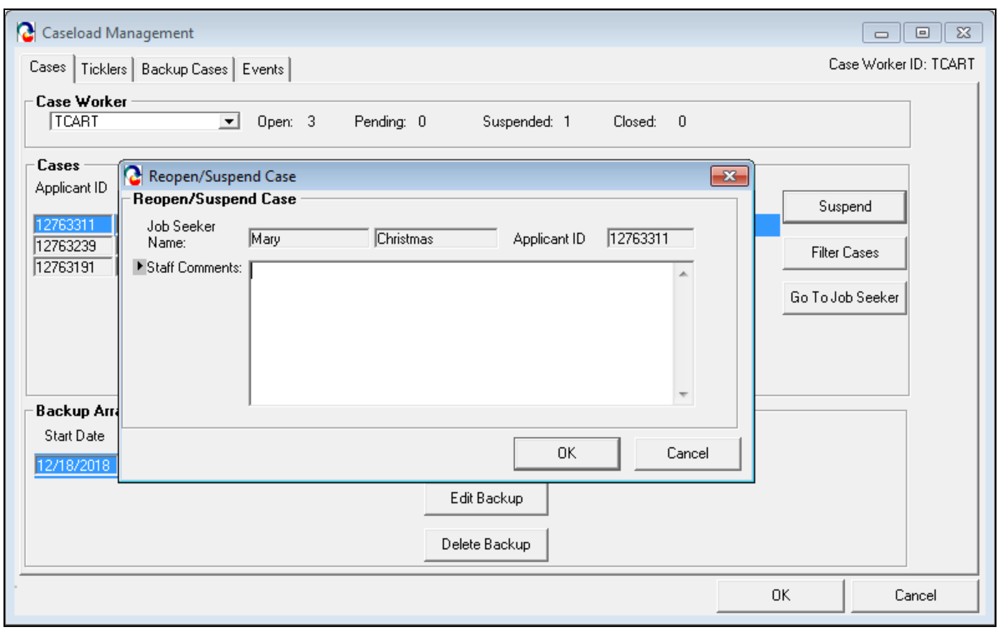
The Pop Up refers to if you are trying to **Close** the Career Plan.

Closed career plans cannot have Goals with a **Goal Status** of **Pending**. The goal *must* have **Attained**, **Canceled**, or **Did Not Attain** as the **Goal Status** to be closed.

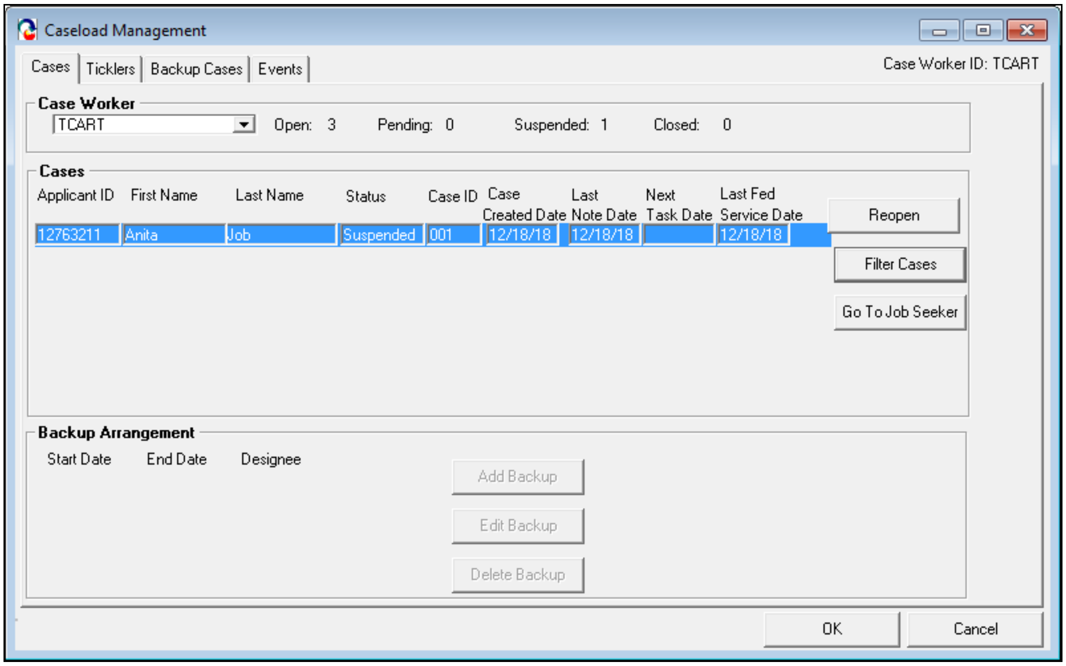
A **Goal Status** of **Pending** means that you are working on this goal.



8. Remember to document why they are being suspended in the **Staff Comments** box.



9. Once you choose **Suspend** for a case, that button label becomes **Reopen** until the case is totally closed. Once the case plan is closed, the button does not appear at all.

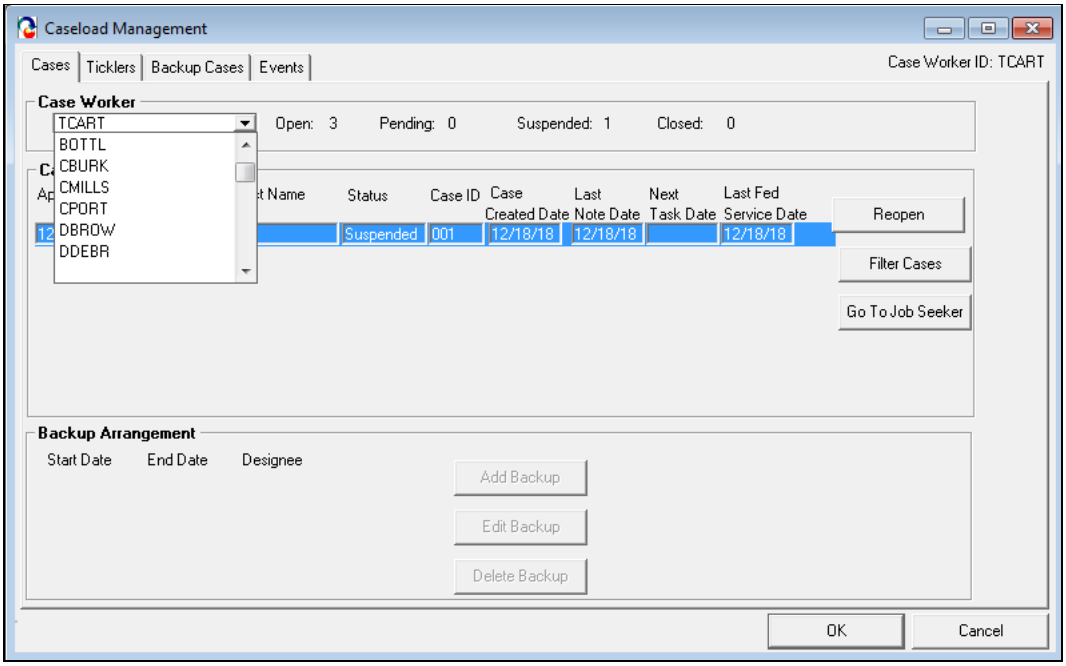


10. The last button in this portion of the **Cases** tab, **Go To Job Seeker**, allows you to open the Job Seeker record.

If the record is already open, you will get a pop-up box stating that the record is already opened. If this is the case, use the **Windows** option from the **Main Menu** bar.
MOSES lists the name associated with open records.
Just highlight the name you want, and that record will become the top-most file.

Remember that <u>all</u> **goals** *and* **tasks** must be closed before your manager can close the case.
ONLY Managers can close career planning cases.
All goals and Tasks need to be resolved.
If the record is **Suspended** and you need to make changes to it, you must **Reopen** the case, make the recommended changes.
Then Suspend it again so the career center manager or supervisor can close it.

11. You can change the view of the active case workers in your office. The default lists your cases, but you can change that list to other case workers in your office.
Highlight the case worker you want to see their overall numbers and the individual cases assigned to them.



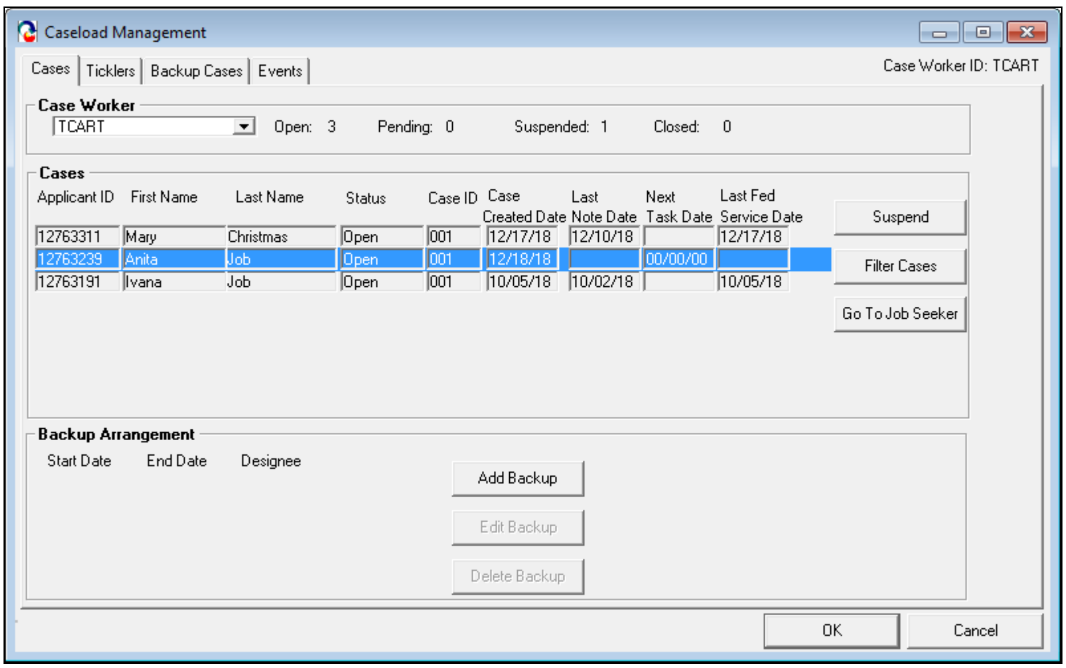
12. This view gives you an idea of each case worker's caseload. This can help you choose back-up case worker(s) for your caseload if you need a backup.

Assign Backups

Assign Backup Caseworkers to Your Caseload

It can be important to assign back-up caseworkers to your caseload.
You are the primary caseworker in all cases assigned to you.
Other people may need to work with your case and record the services and activities they provide.

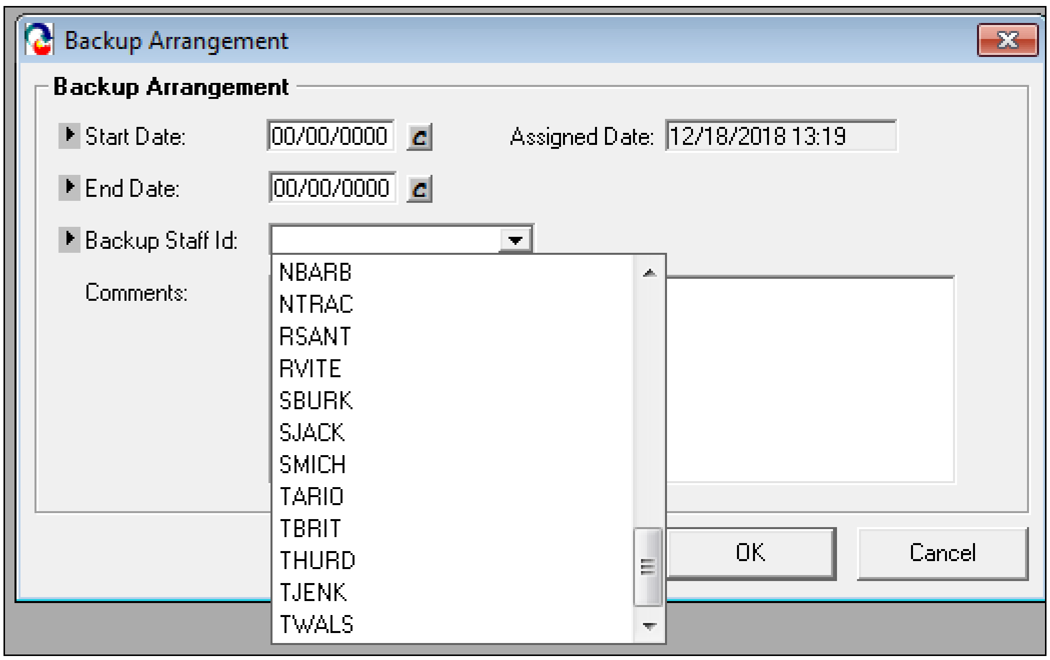
1. Highlight the case where you want to assign Backup caseworker(s).
You may assign more than one back-up caseworker to each case.



Depress and hold down the ***Shift*** key to highlight cases next to each other.
Depress and hold down on the ***Control*** key to highlight cases that are not next to each other (non-contiguous).
Make sure the case worker you want to assign as backup is not assigned in any of the cases you choose. If they are, none of the assignments will work.
Select the cases with care.

2. Now click the **Add Backup** button in the lower portion of the **Cases** tab.

3. You must assign a **Start Date**, **End Date**, and **Backup Staff ID**.
   While not required, you should enter the reason why you are assigning this person in the **Comments** section.
   The date and time the case was originally assigned to you appears in the top right corner.



You cannot back-date the **Start Date** to prior to today's date.
This fact points out why it is so important to assign back-up caseworkers right away.

Give your backup case workers enough time to provide the services and to enter the information about those services and meetings. Even if you maintain the excellent habit of data entering information the day it happens, do not assume all other staff will do the same.

The **Assigned Date** field shows you when the person was originally assigned to you in career planning.

There is no time constraints on assigning a backup.
A backup could be assigned for multiple years. It is just a number.

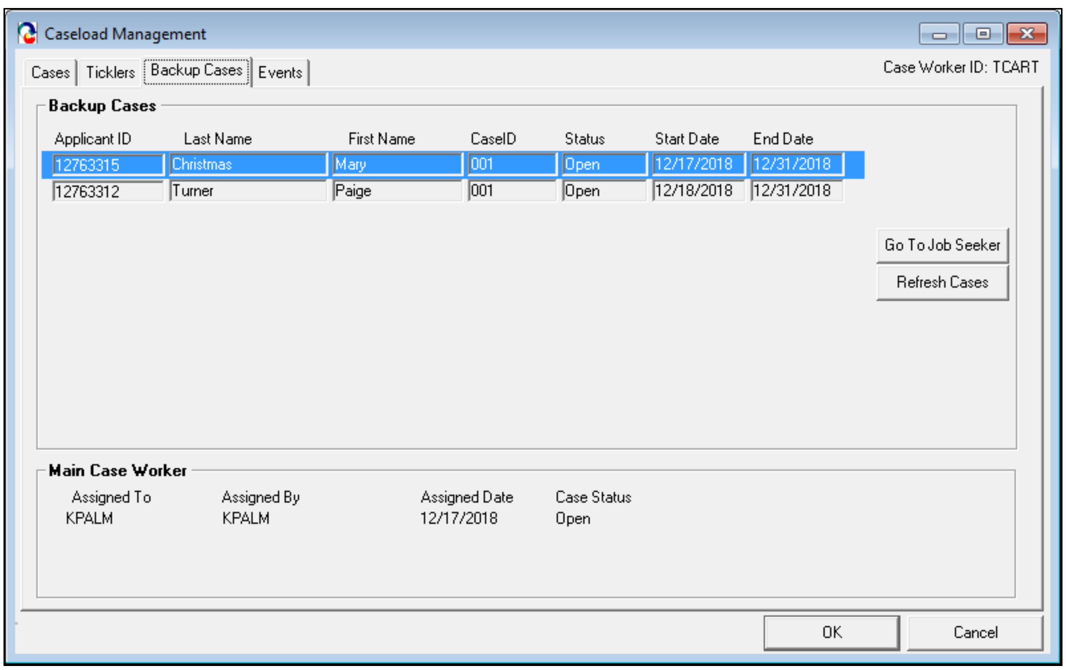
You are the Backup

View Cases Where You Are the Backup Caseworker

You need to see those cases where other case workers have named you as the backup case worker for their cases.

1. Click the **Backup Cases** tab. This shows the list of backup cases for the Case Worker shown in the upper right corner of the screen.

2. Review the list.
You will see who is the primary caseworker for the highlighted case in the **Main Case Worker** box at the bottom.
This can give you a running number of how many cases are on your list.
In addition, you can view the dates where you have active rights to enter information and view the entire case plan. (The **Start Date** and **End Date** columns.)



3. Click on the **Go To Job Seeker** button to view the job seeker record in MOSES.

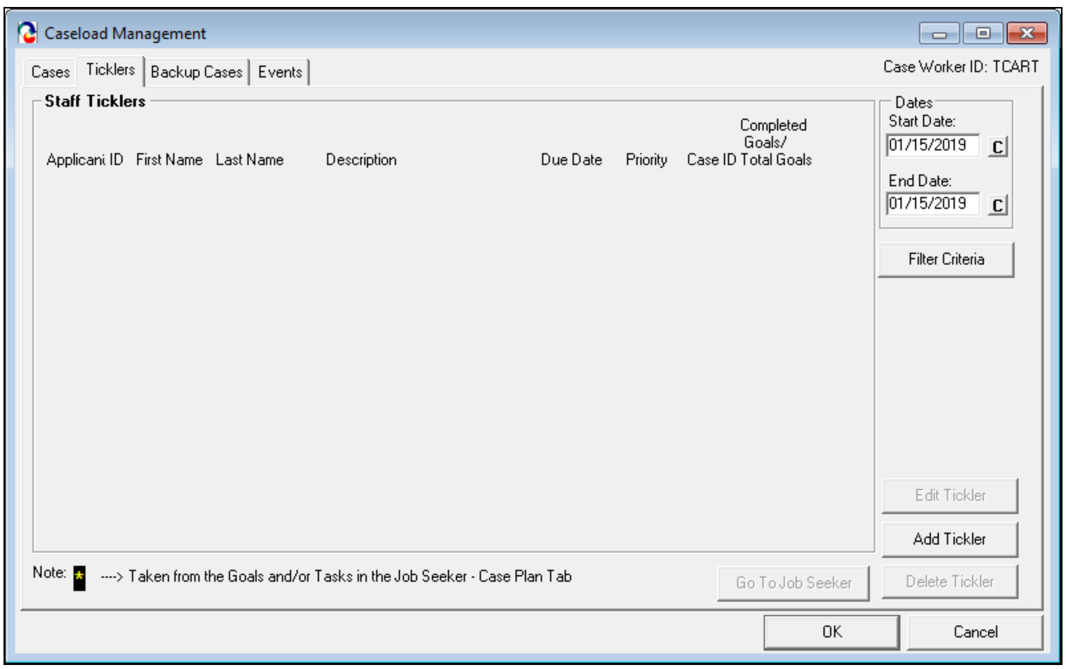
4. Click on the **Refresh Cases** button to change the list to match the **Case Worker ID** shown on the top right corner.
This **Case Worker ID** is the one selected on the **Cases** tab.

Ticklers

View Ticklers for Your Assigned Caseload

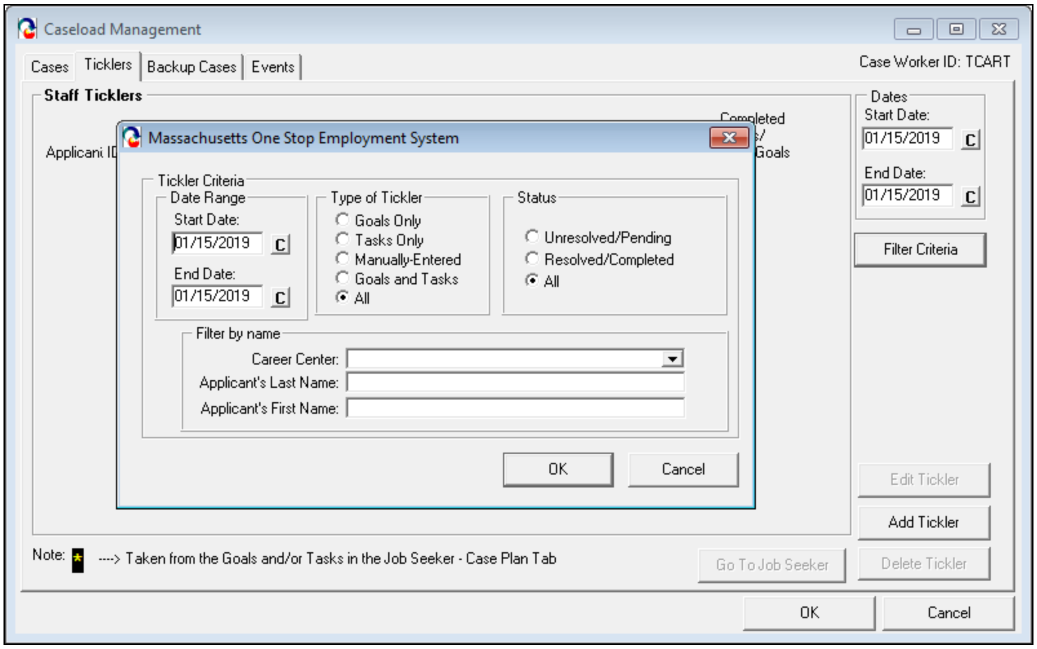
Ticklers is a way for you to see which of the Customers assigned to you are supposed to be working on their goals.
The **Ticklers** tab has the look and feel of the **Events** module.
Not only are all the **Goals** and **Tasks** assigned to your cases brought up here, but you can also create your own ticklers.
This can help you monitor the activity of the Customer under your care, as well as remind you of the follow-up you may need to make.

1. Click the **Ticklers** tab.

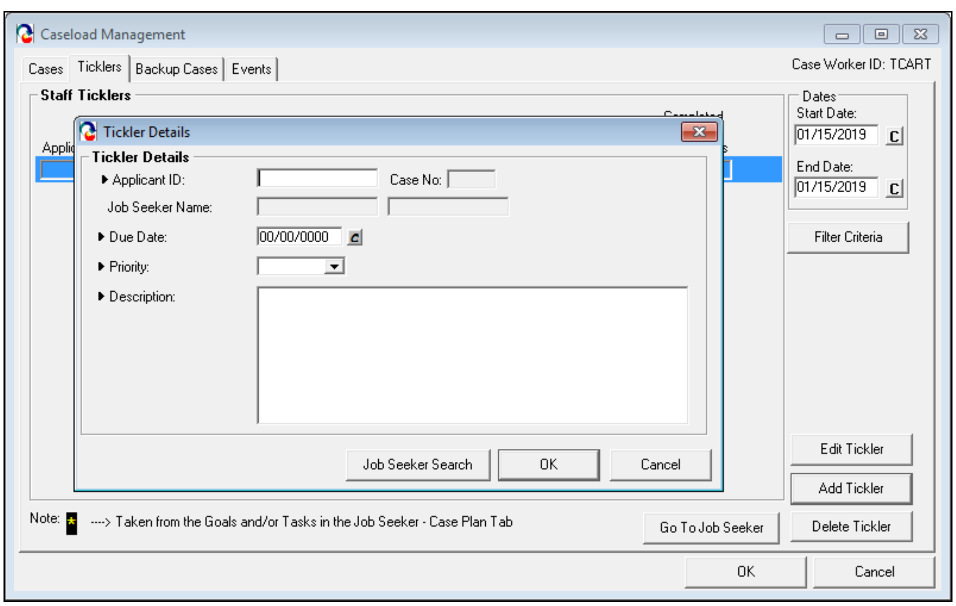


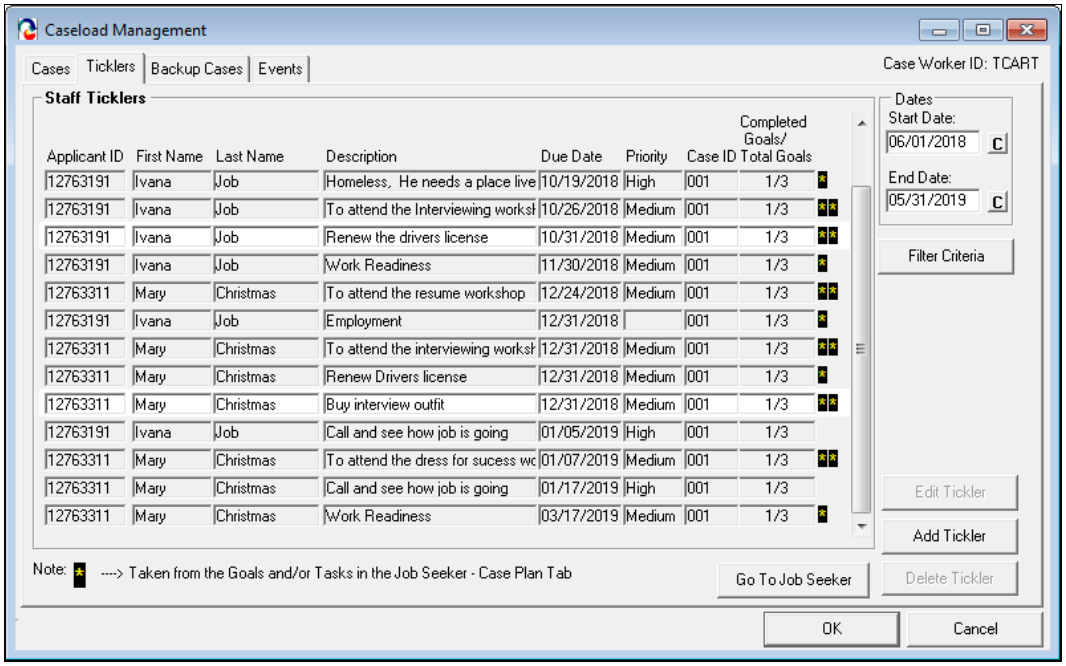
2. Use the **Start Date** and **End Date** fields to bring up your relevant ticklers. The default for both dates is *today's* date.

3. Another way to search is with the **Filter Criteria** button. This allows you to do a detailed search by **Date Range**, **Type of Tickler**, **Status**, **Career Center**, **Applicant's Last Name**, and/or **Applicants First Name**.



4. Click the **Add Tickler** button to add your own tickler. The **Tickler Details** window opens up allowing you to enter a Tickler.
Fill out the required fields.
Click **Ok** to save.

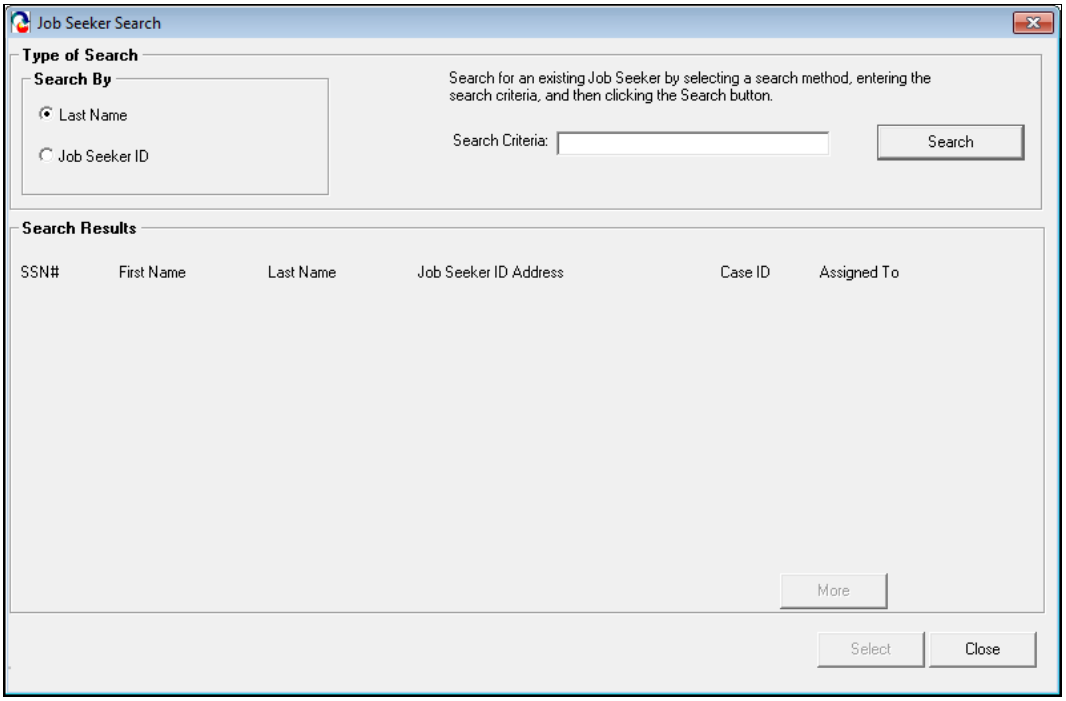




Anything marked with a single asterisk is a *goal* brought up to the **Ticklers** screen from the Job Seeker **Case Plan** tab, **Goals** sub-tab. Anything marked with a double asterisk is a *task* brought up to the **Ticklers** screen from the Job Seeker **Career Plan** tab, **Goals** sub-tab.

You can only add **Ticklers** for customers that you are providing **Career Planning** for.
The Job Seekers that are on your **Case** tab.
You cannot do **Ticklers** for non-Career Planning customers.

5. If you don't know the Applicant id number of the Job Seeker for whom you want to enter the **Tickler** item, click the **Go Job Seeker Search** button.
This opens up a **Job Seeker Search** window.

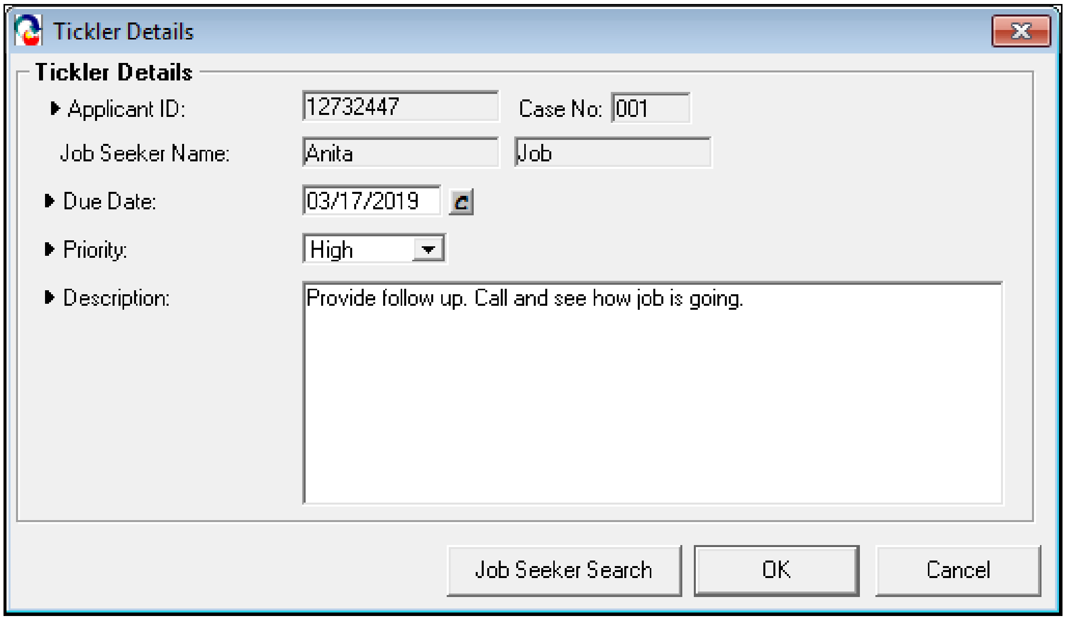


This **Job Seeker Search** screen differs a bit from the regular **Job Seeker Search** screen that appears when you click the **Job Seeker** icon or click the **Job Seeker** option from the **Main Menu** bar and select **Job Seeker Services**.
The two main exceptions include:
The first is there is no **Advanced Search** button.
This is because you may only select one Customer at a time, and because you should know your caseload by last name.

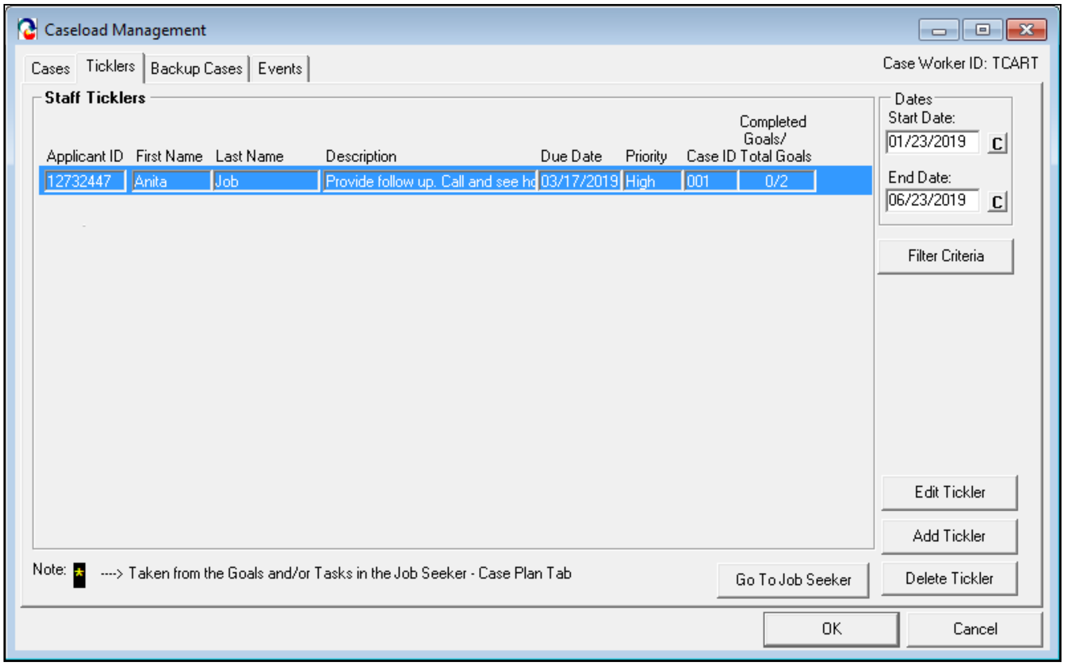
Remember that if you use the last name for your case search, you will only be allowed to select the Customer where you are the primary or backup caseworker.
MOSES brings up all job seekers that match the letters you type, but will give you a warning pop-up box if you chose a Customer not assigned to you.

6. After you have completed your search, highlight the Customer you want and click the **Select** button.

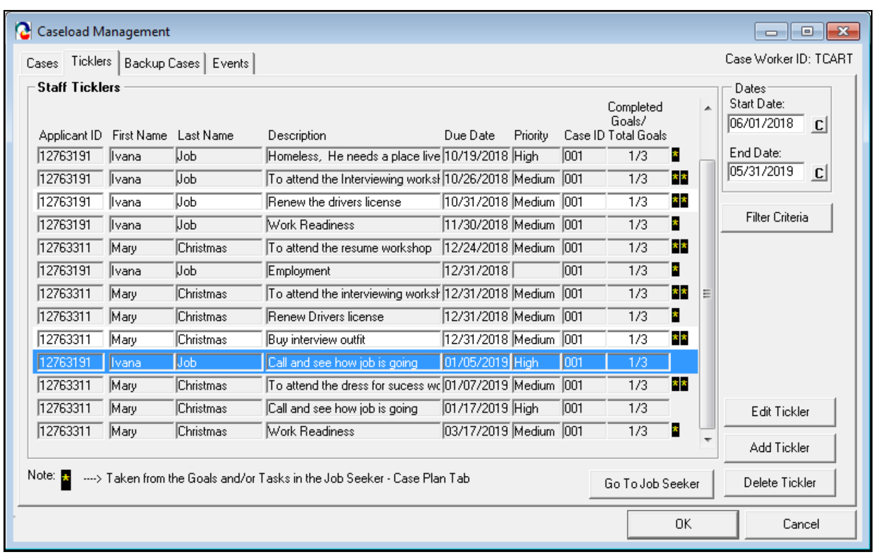
7. This brings you back to the **Ticklers Detail** screen.
Remember that all the fields here are required ▶.
MOSES completes those fields based on your use of the **Applicant Id** or the **Job Seeker Search** screen.



8. To view this tickler, you need to use the **Start Date** and **End Date** fields or the **Filter Criteria** button.



9. You can also **Edit** or **Delete** manually-entered **Ticklers**, as you choose. This only works for Ticklers you create from the **Ticklers** tab, not those **Goals** and **Tasks** brought forward from the **Case Plan** tab, **Goals** sub tab.



10. You can also click the **Go To Job Seeker** button, if you need to review or make changes to the record.

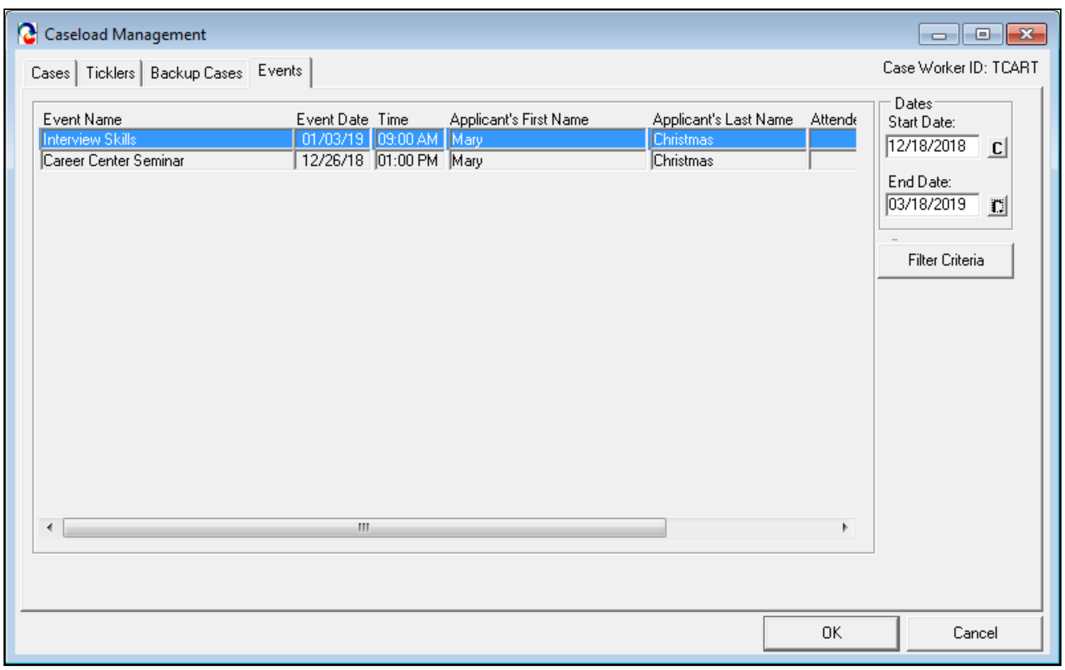
Events

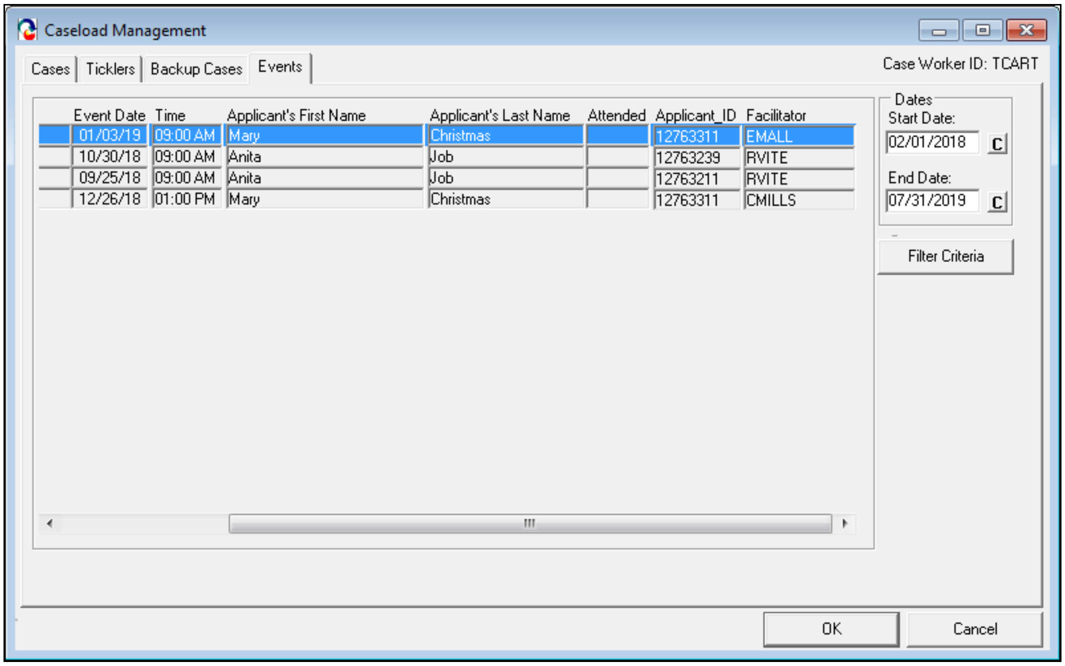
View Current and Past Events for Your Assigned Caseload

Events is a way for you to see which of the Customers assigned to you are or were enrolled in **Events** at your or other career centers.
This can help you monitor the activity of the Customers under your care, as well as remind you of follow-up calls you may need to make.

1. Click the **Events** tab.

This view, **Events**, shows you all the events where customers on your caseload are enrolled, have registered or have attended a workshop or scheduled event.
This tab may also show you events that *already* occurred, but did not have the attendance information completed.
Use the **Start Date** and **End Date** fields or **Filter Criteria** to search for future, current or past events.





This tab gives you a lot of information about the event and the Customers. Use the horizontal slide bar to show you the name of the main facilitator for the event.

Documents in Word

View Case Plan in Word

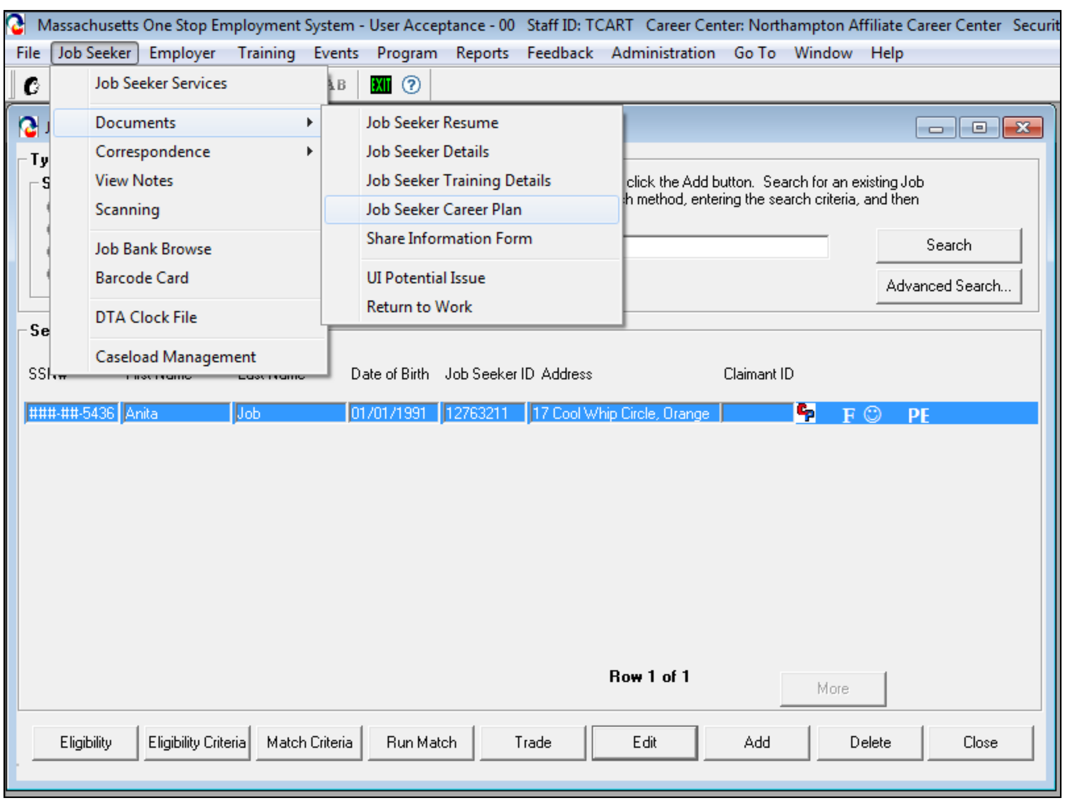
There is a way to view the entire career plan in Microsoft *Word*.
You must bring up a Job Seekers screen to do this.
This brings up a document that includes information recorded in MOSES, as well as places to add other information in Word.

1. Carry out a Job Seeker search, either by clicking the **Job Seeker** icon  or by clicking **Main Menu**, **Job Seeker**, **Job Seeker Services**.

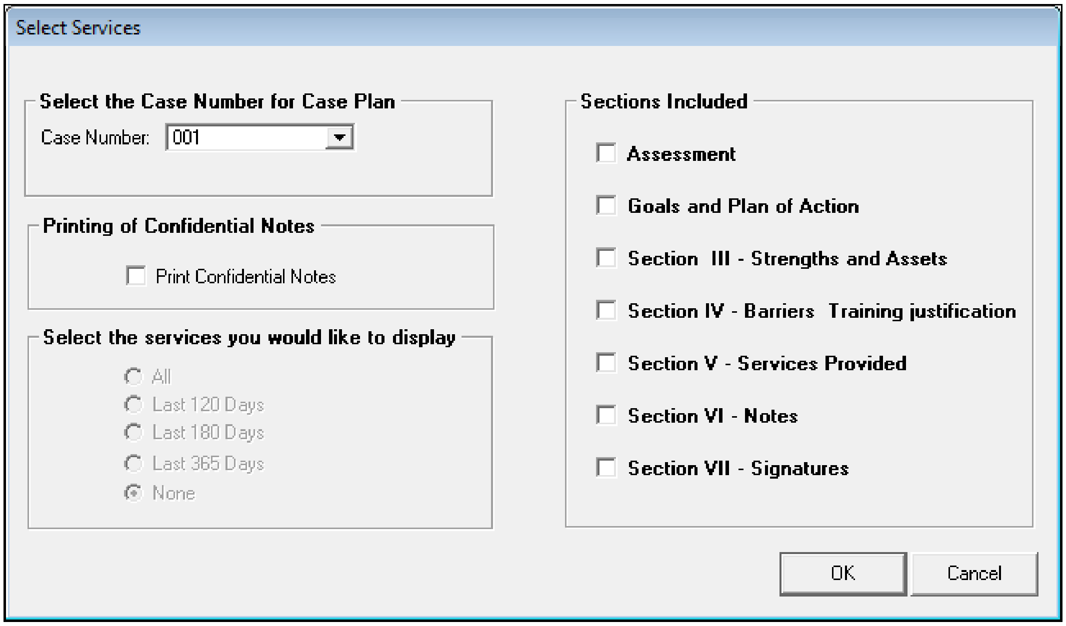
2. Highlight the Job Seeker whose career plan you want to view in **Word**.

3. You can open that Customer's record, if you want <u>or</u> just *highlight* the job seekers record on the **Job Seeker Search** window.

4. Click on the **Main Menu** bar, **Job Seeker**, **Documents**, **Job Seeker Career Plan**.

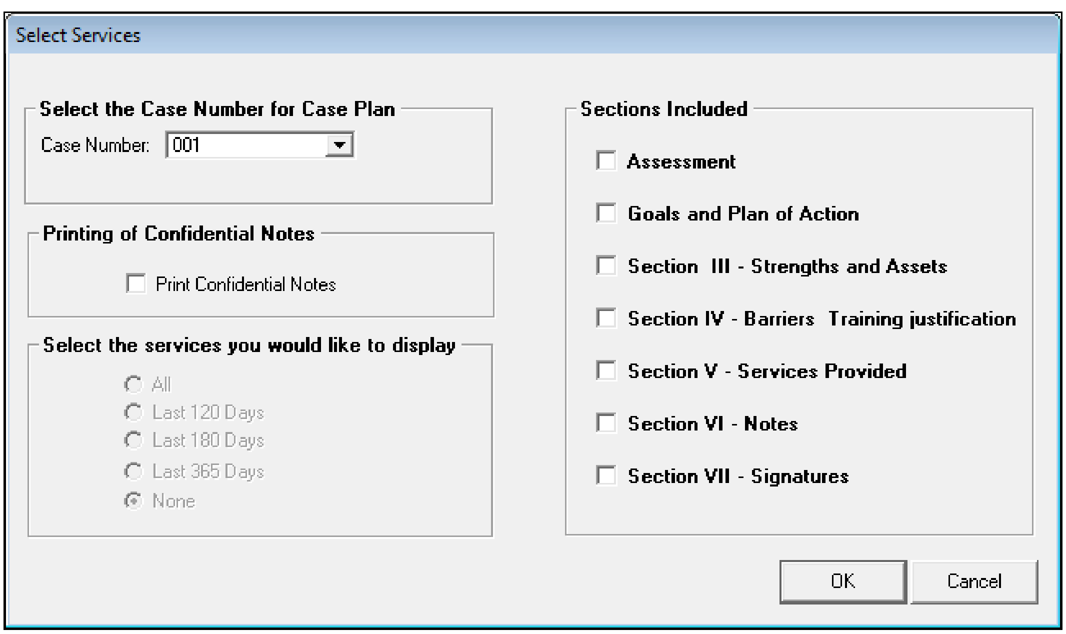


5. This brings up the **Select Services** screen.

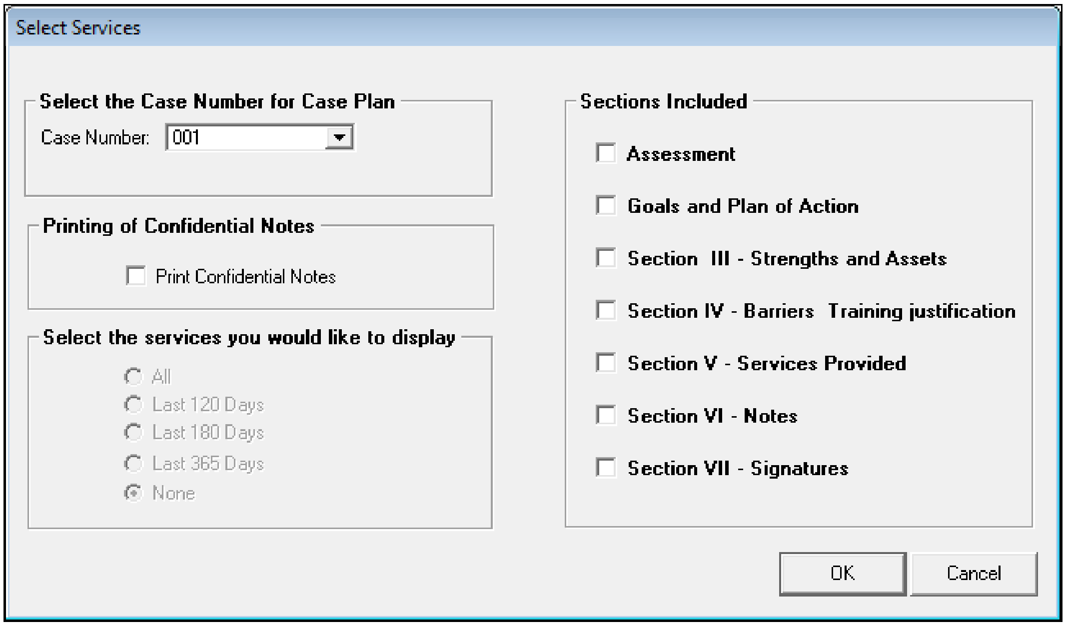


To view the career plan, one has to have already been created.
If no case plan number appears in the drop-down list, this customer has not been enrolled in Career Planning or assigned to a primary caseworker.

6. Check off the box next to any **Sections** you want to include in the Career Plan document.



7. Select whether or not you want to include **Confidential Notes**. The default choice is "No" (*blank*). Just check the box if you want to include them.



8. If you check off **Section V - Services Provided** then select the date range you want for the services appearing in the career plan document. You have five choices: **All** services, those services delivered to the Customer in the last four months (**120 days**), the last six months (**180 days**), the last year (**365 days**), or no services (**None**) at all.

9. Click on the **OK** button to bring up the career plan in *Word*. This may take a few minutes.

10. The **Plan for Success** (the Career Plan document) includes the seven sections: **Assessment**, **Goals and Plan of Action**, **Strengths and Assets**, **Barriers and Training Justification**, **Services Provided**, **Notes**, and **Signatures**.
The last page is shown here.
Remember to enter a **Note** if you and your customer sign the document.

MASSACHUSETTS ONE STOP EMPLOYMENT SYSTEM
PLAN FOR SUCCESS

Customer Name: Press P. Primpteen	
MOSES Job Seeker ID: 10012586	Case Plan Number: 10012586001(001)
Caseworker Name: Peggy Colligan	

SECTION VII – SIGNATURES

I have assisted in completing this case plan, and I agree with the goals and actions listed in it. I am aware of my responsibility to continue to seek unsubsidized employment. I agree to the plan and to the level of cooperation and participation needed for me to complete this plan. I will meet with my caseworker on a periodic basis to discuss my progress in meeting my goals. I understand that my caseworker may need to meet with other staff or agencies on my behalf to help me reach my goals.

Signatures:

Customer: ______________________ Date: ______________________

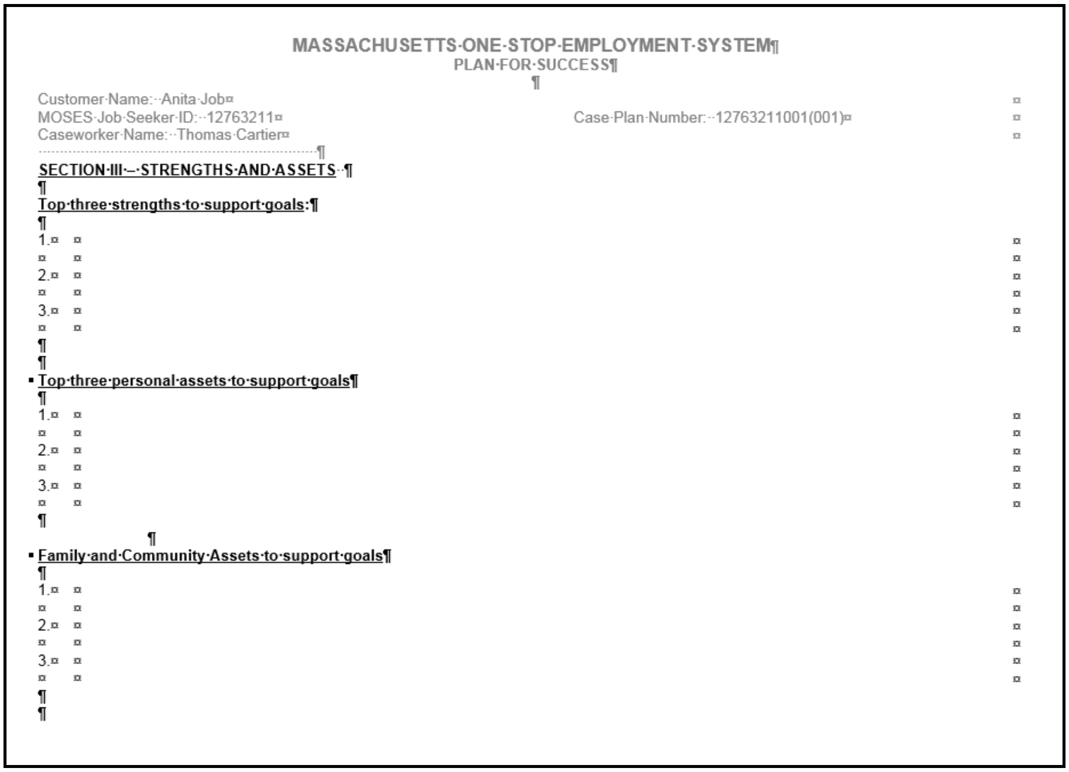
Caseworker: ______________________ Date: ______________________

MOSES documents seen in *Word* use **Table** formats.
MOSES brings forth every section and sub-section, whether or not the information exists in MOSES.
To delete a table with no entries, simply click in the table, then go to the **Table** option on the **Main Menu** bar in *Word*, then choose **Select Table**.
This highlights the whole table.
To delete the empty table, go to the **Table** option on the **Main Menu** bar in *Word*, then choose **Delete Rows**. This will reduce the length of the document.

If you want to save this case plan, you need to use **File**, **Save As**, and then give it a name you will remember.
Some helpful tips for the file name include the customer's name and today's date and that it is a career plan.
In the example shown above, the file should be saved as "Anita Job January 2019 Career Plan".
Try <u>not</u> to use punctuation marks in the title.

Remember that none of the formatting symbols will show up in the printed documents.

Remember that *none* of the changes you make in Word will get transferred back to MOSES unless you use copy and paste it back into MOSES.
This may be a good way to run a spell and grammar check on your entries.



MASSACHUSETTS ONE STOP EMPLOYMENT SYSTEM
PLAN FOR SUCCESS

Customer Name: Anita Job
MOSES Job Seeker ID: 12763211 Case Plan Number: 12763211001(001)
Caseworker Name: Thomas Cartier

SECTION III – STRENGTHS AND ASSETS

Top three strengths to support goals:

1.
2.
3.

Top three personal assets to support goals

1.
2.
3.

Family and Community Assets to support goals

1.
2.
3.

Any information on **Section III – Strengths and Assets**, need to be manually entered into the *Word* document.
This does not get transferred back into MOSES.
This section is not in MOSES.

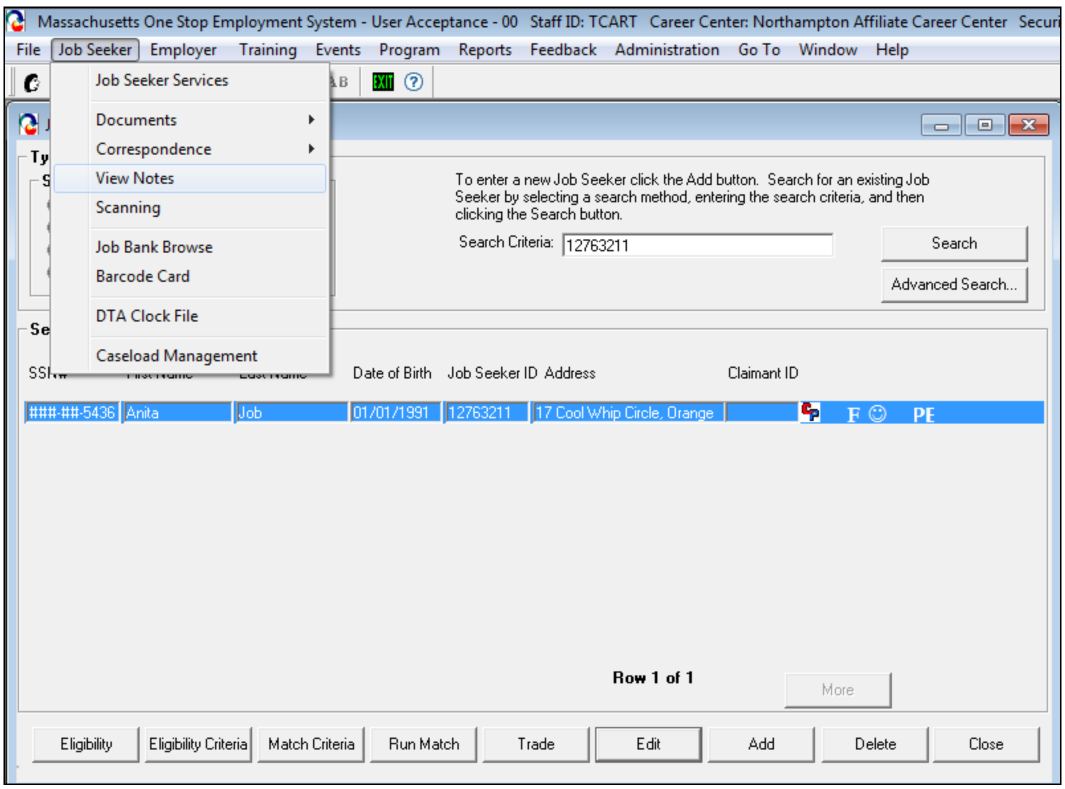
Other Ways to View Notes in Word

We explored how to enter **Notes** in the Notes section.
It required that you click on the **Expand All Notes** button in the **Notes** screen for the Customer.
You can also view these Notes in *Word* from the **Job Seeker** option on the **Main Menu** bar.

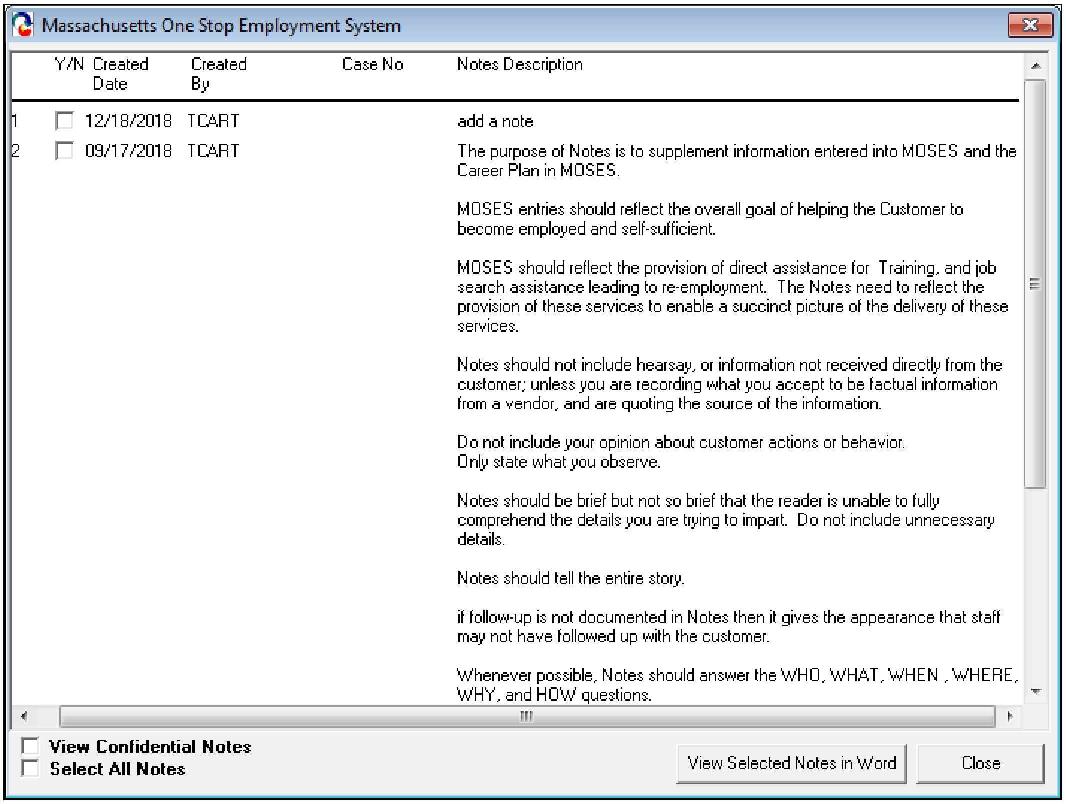
1. Carry out a Job Seeker search, either by clicking the **Job Seeker** icon or by clicking **Main Menu**, **Job Seeker**, **Job Seeker Services**.

2. Highlight the Job Seeker whose notes you want to view.

3. Now click the **Main Menu** bar, **Job Seeker**, **View Notes**.



4. You now have a list of all the <u>non-confidential</u> notes entered for that Job Seeker in MOSES, in the **Notes** area.

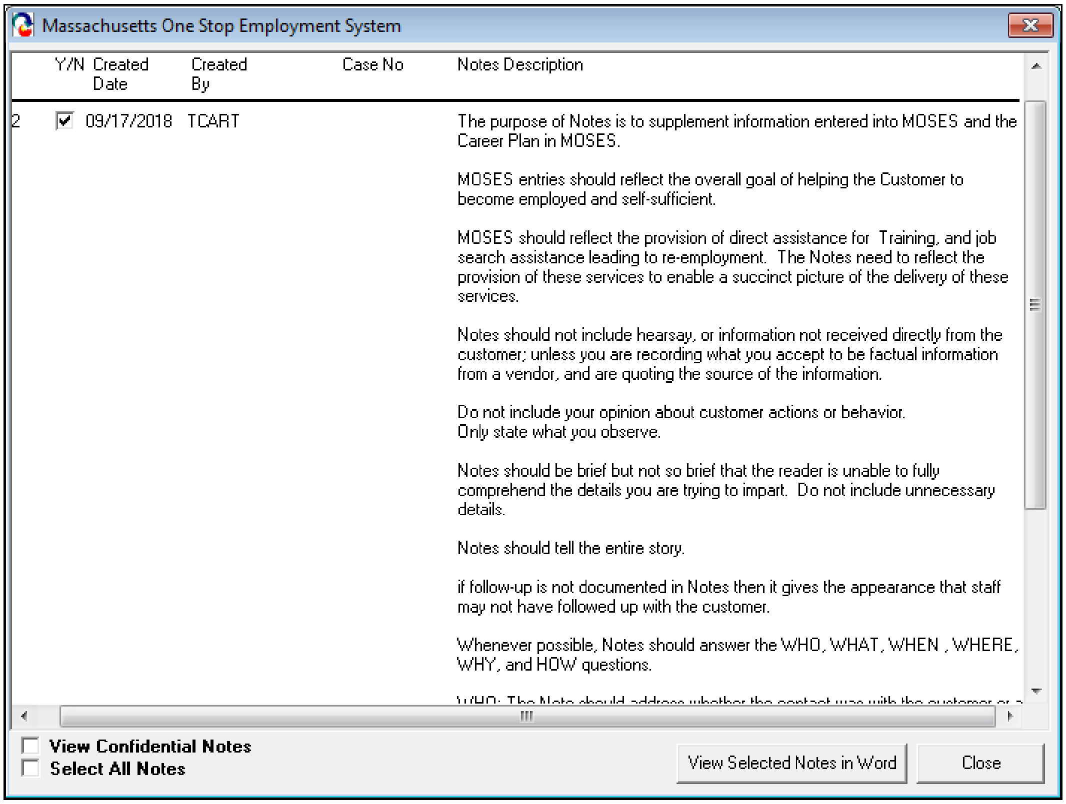


5. Click the **View Confidential Notes** check box to view all notes, whether or not they are confidential.
You must have clearance to view confidential notes of others to see confidential notes other staff entered.

Remember that people that have that security clearance can view confidential notes in MOSES.
These people are concerned staff, just like you, and will treat this information in a professional manner.
Keep this in mind when writing your notes.
Keep your notes pointed, clear of opinion, and understandable.

6. Click the **Y/N** box to select the notes you want to view in *Word*.
If there are a large number of notes, click the **Select All Notes** at the bottom and then deselect the notes that you do not want by checking off the boxes of those notes you do not wish to see. This deselects them.

7. Click the **View Selected Notes in Word** button to see the **Notes** in *Word*.

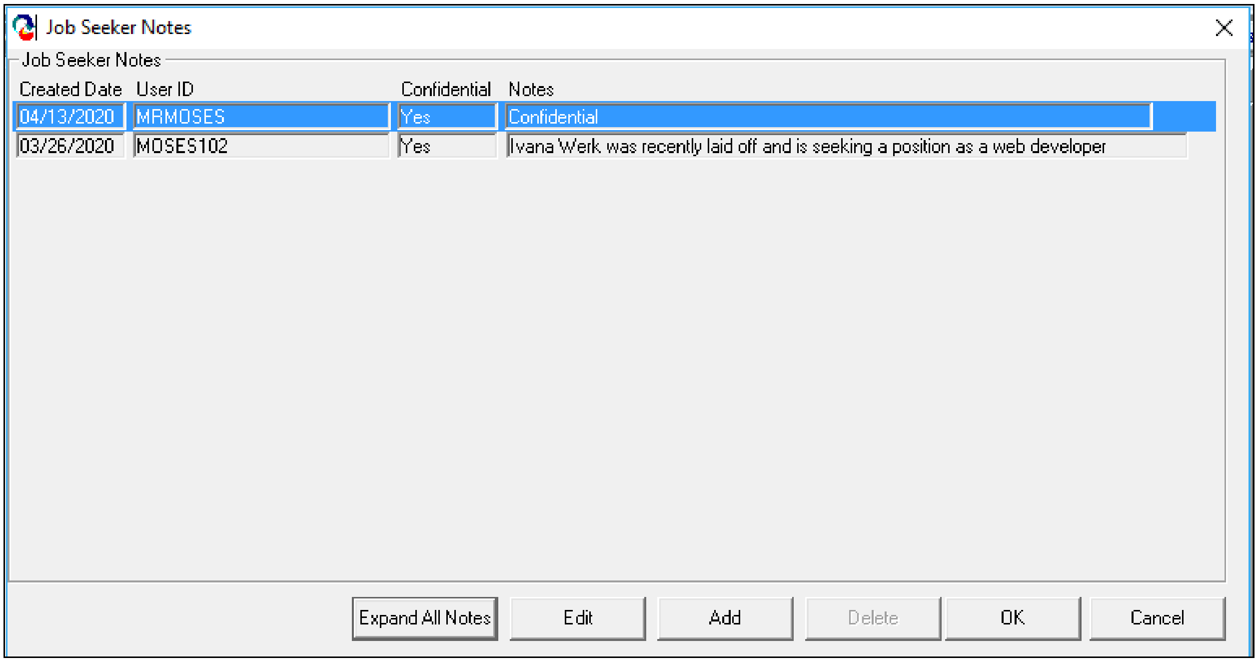


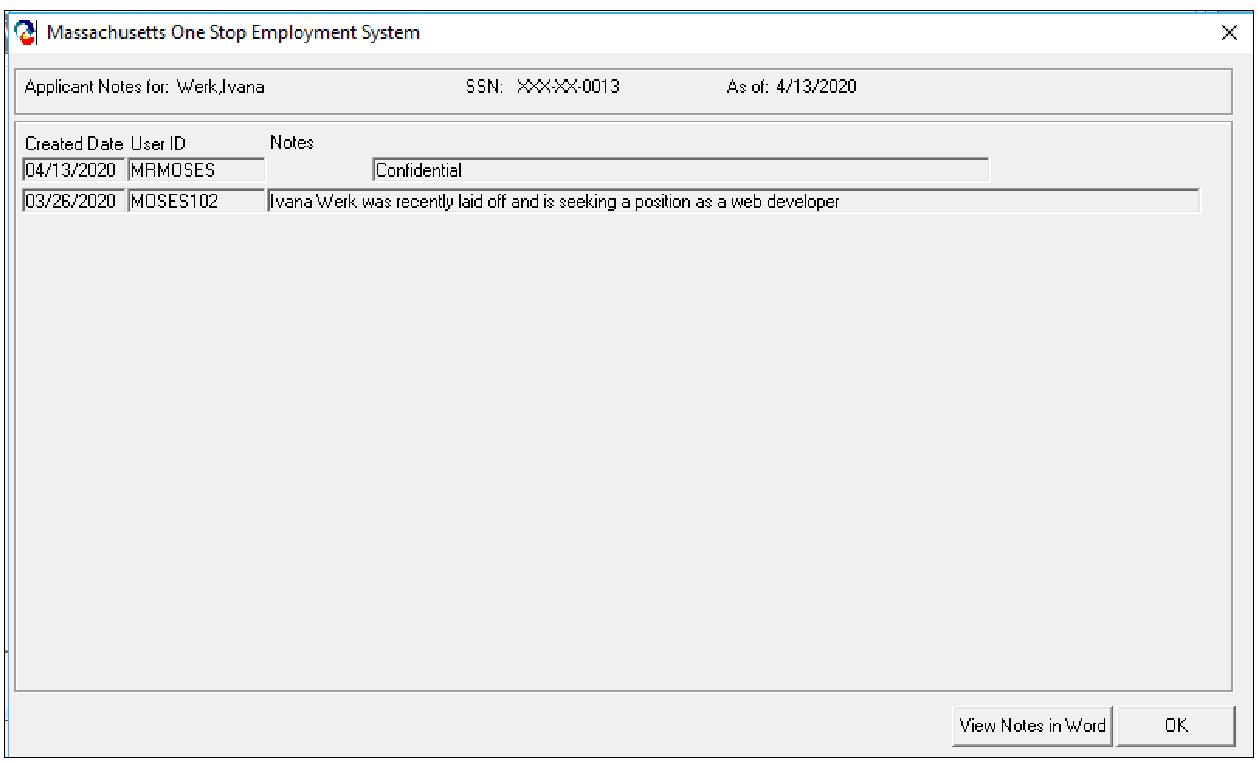
8. You may then edit and print out the **Notes** as a *Word* document.

The Key symbol means that this is a **Confidential Note**.
In the above example, the viewer does not have security clearance, so the **Note** does not show.
If you do have security clearance the **Note** will show.

Note if you edit your notes in the *Word* document, they will not be edited in the Job Seekers MOSES record. To edit the Notes in the MOSES record, you would need to go into each Note you want to edit and manually edit each one separately. Using copy and paste may make this faster.

Below are screen shots of **Notes** with Confidential notes, but the staff person viewing them does not have security clearance to view Confidential Notes from other staff members.





Issuances