Career Planning
In
MOSES

2020

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MOSES 37.2

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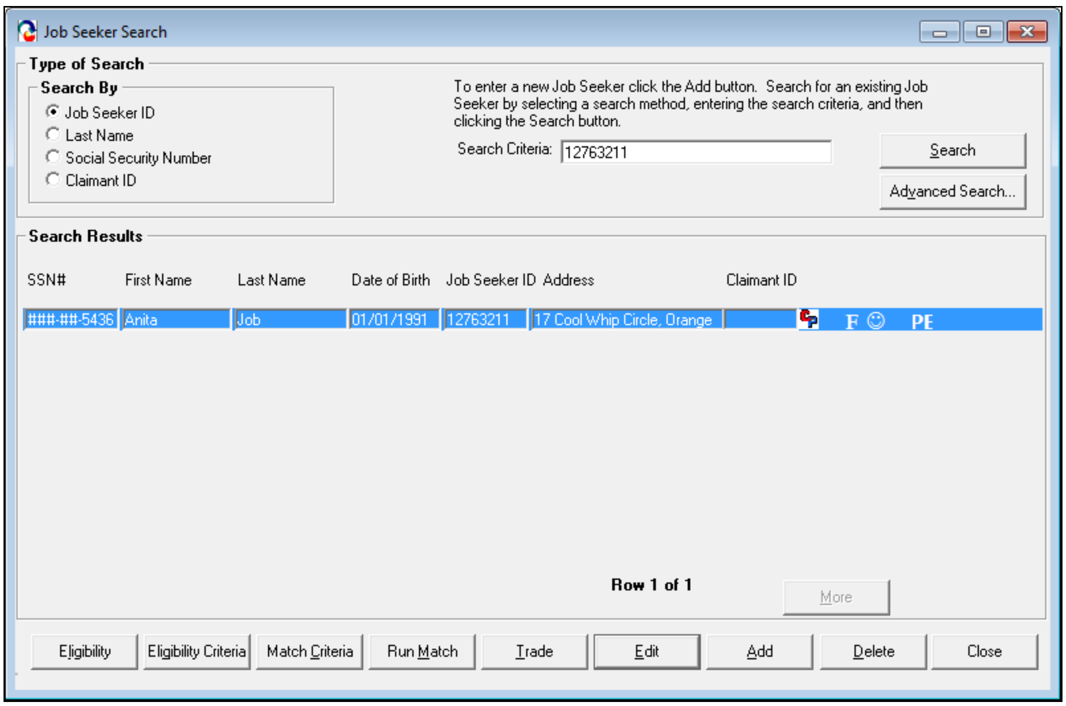
The Career Plan in MOSES

Overview

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

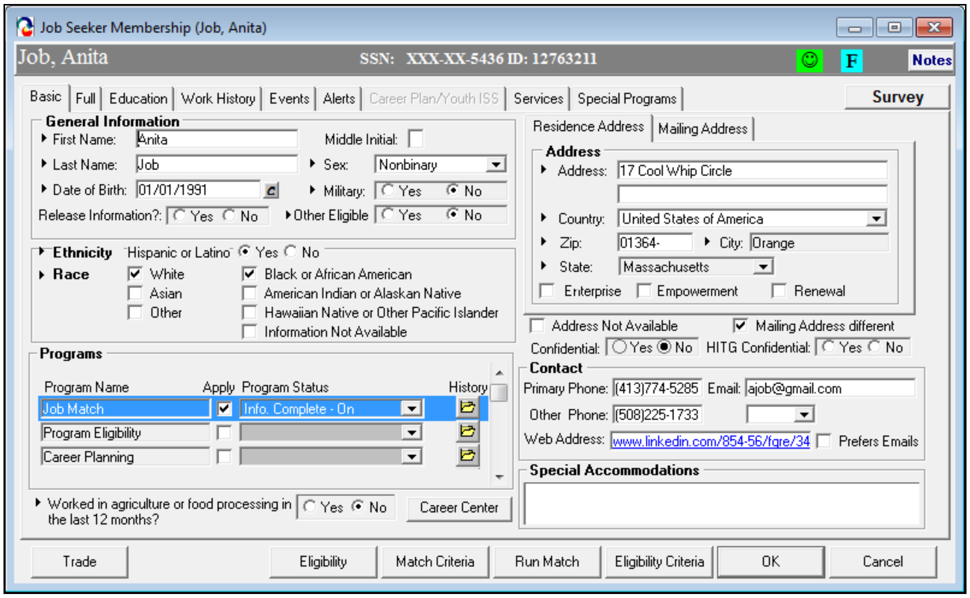
Review Information from the Job Seeker Record

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



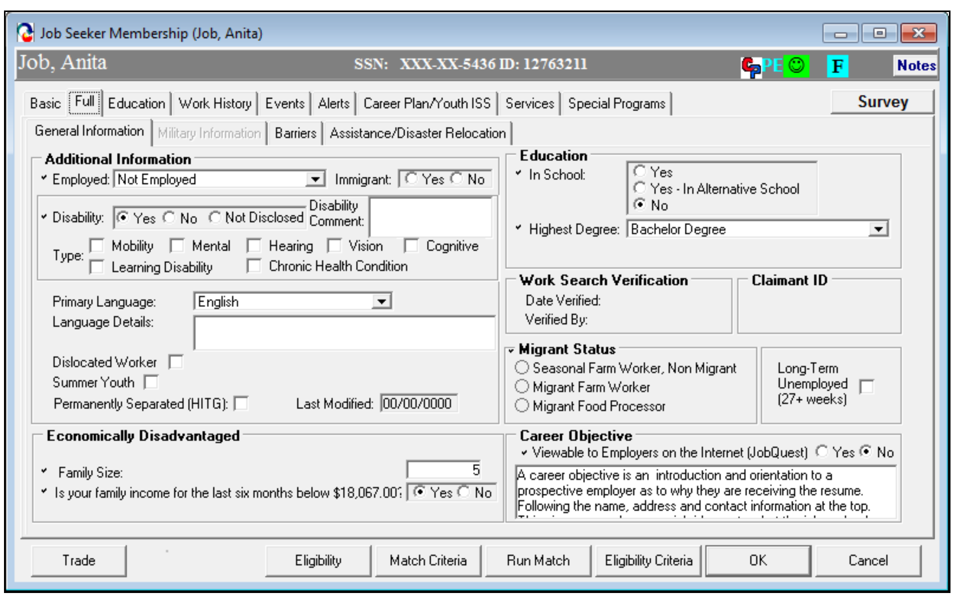
2. Click the **Edit** button or *double click* to open the record.

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



3. Click the **Full** tab.

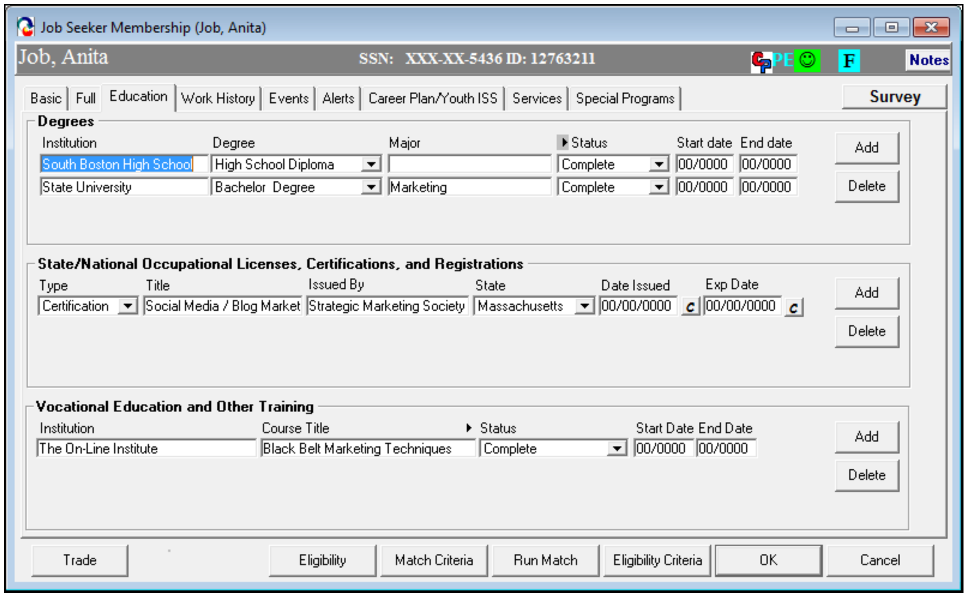
   The **Full** tab screen appears. Review the information. Remember to look at the Military Information, *if it is applicable*.



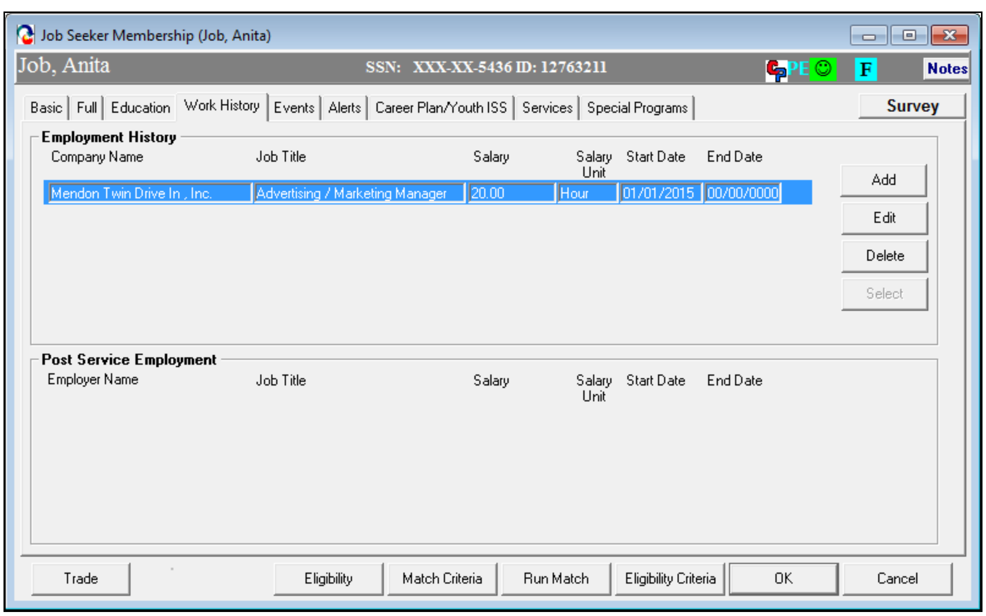
Remember that the Full tab must be completed for customers to be eligible for many of the career center programs and it must be done for job matching.

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.

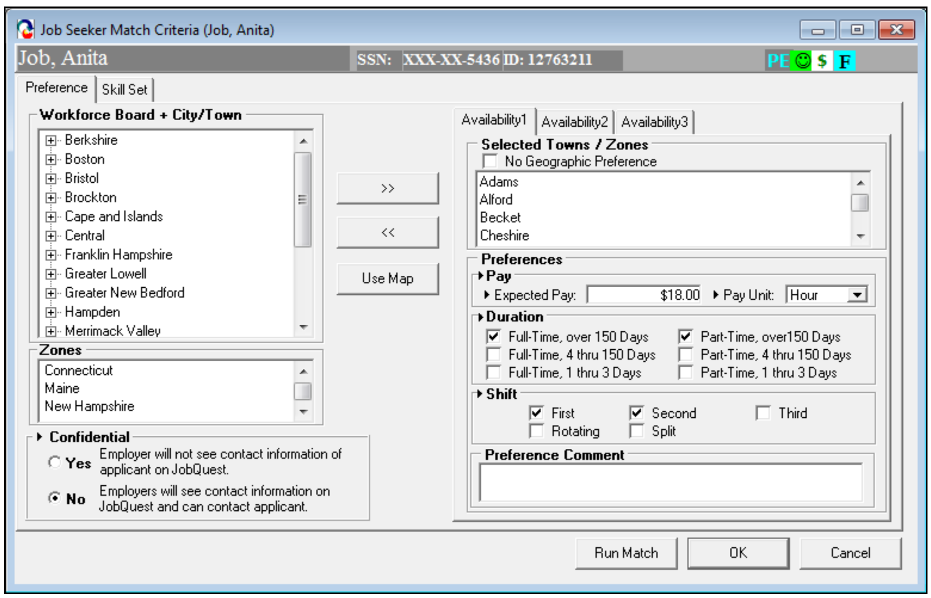


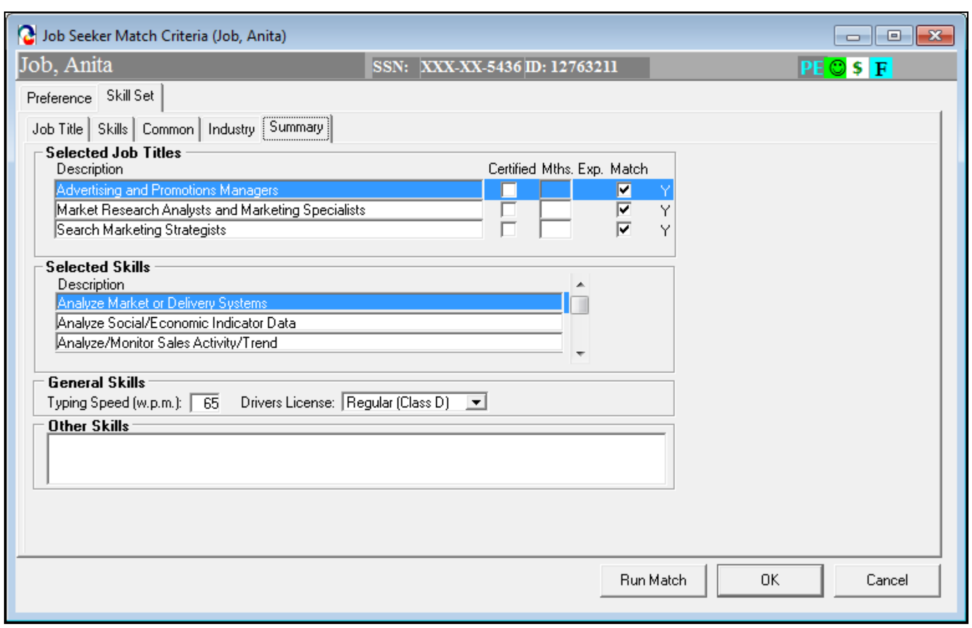
6. Click the **Match Criteria** button.

The **Match Criteria** window appears.

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

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





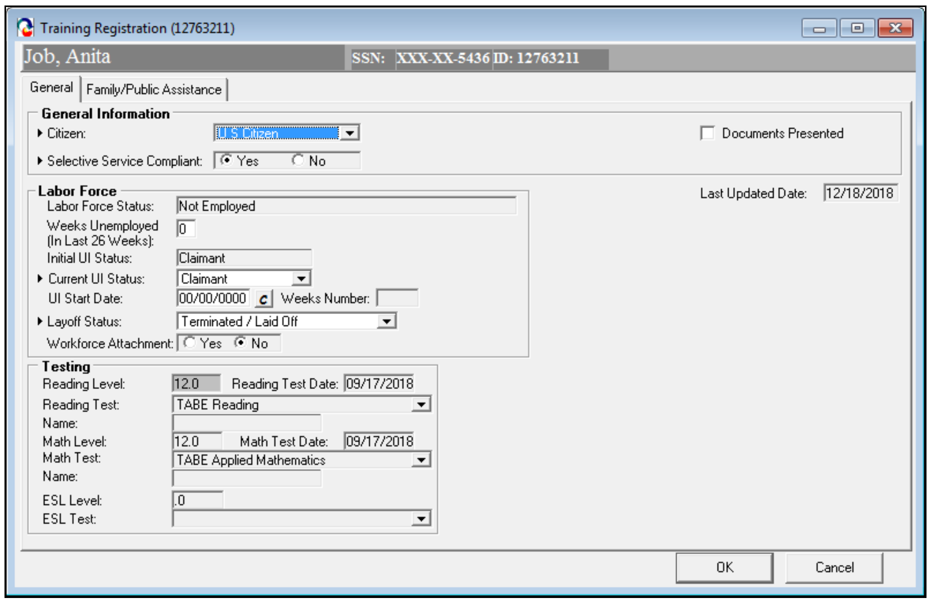
7. Click the **Eligibility Criteria** button at the bottom.

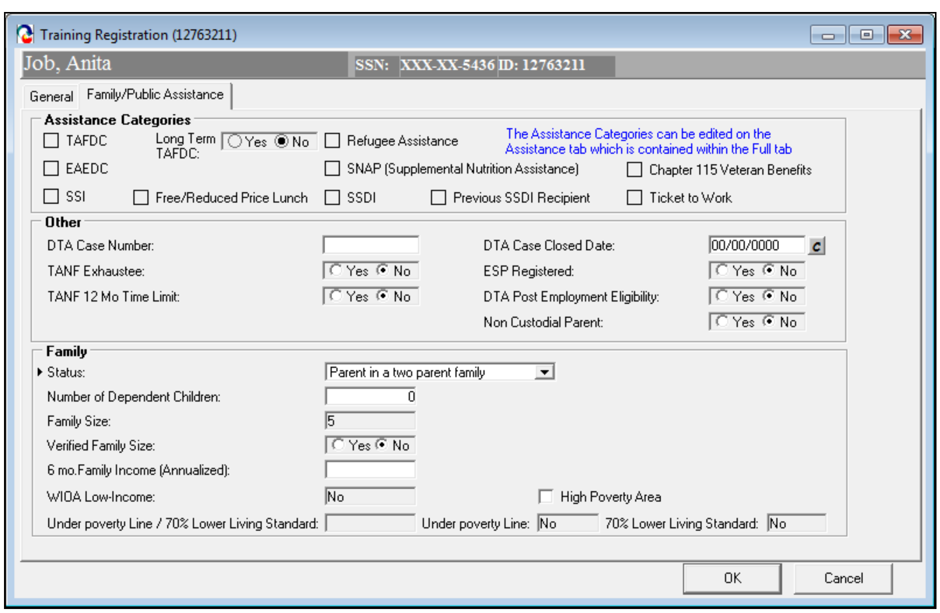
   The **Training Registration** window appears.

   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.

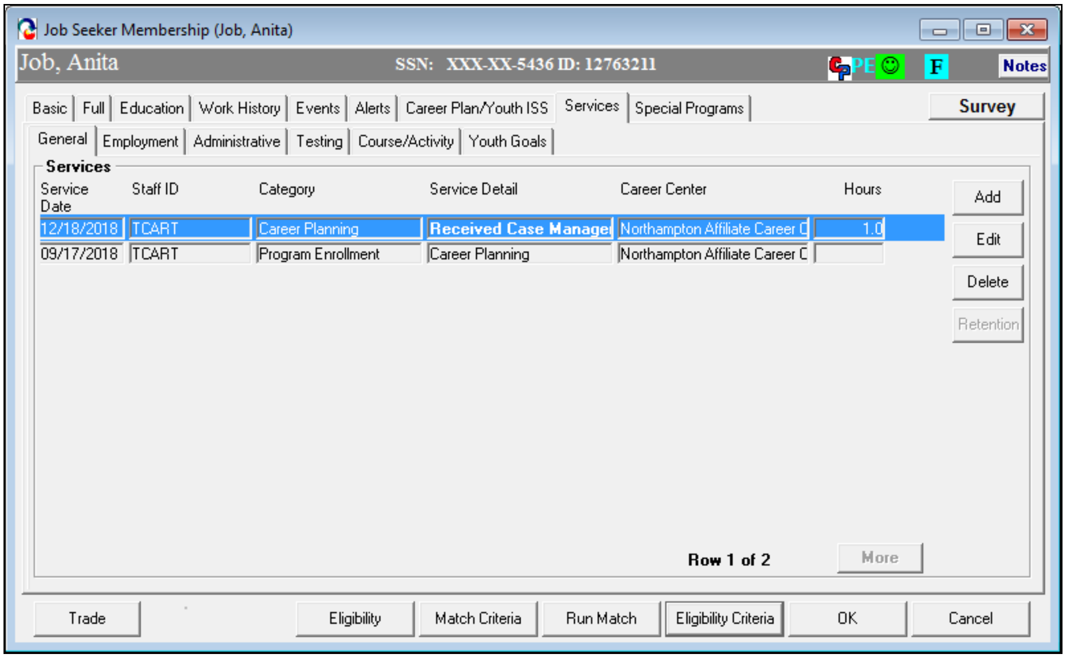




8. Click the **Services** tab.

Review the services.

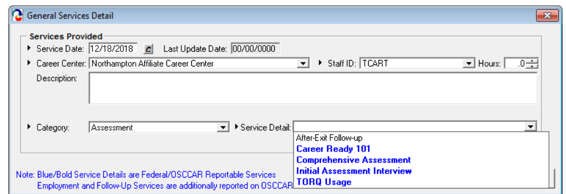
Services can appear in the **General**, **Employment**, **Testing**, and/or **Course/Activity** services sub-tabs.



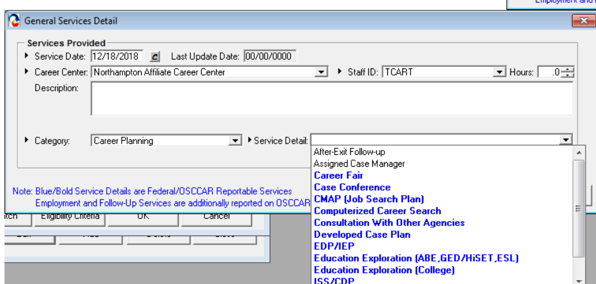
9. The following screens show some of the key **General** services that relate directly to **Career Planning**.

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.)

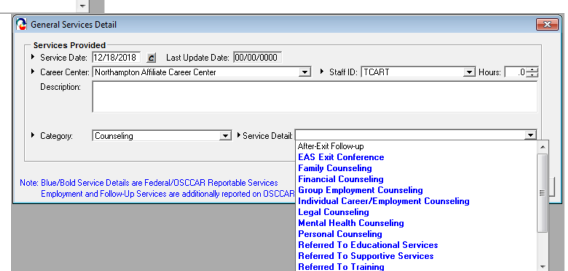
This will help you, your fellow caseworkers, your managers, and any program monitors know that you provided the service listed.



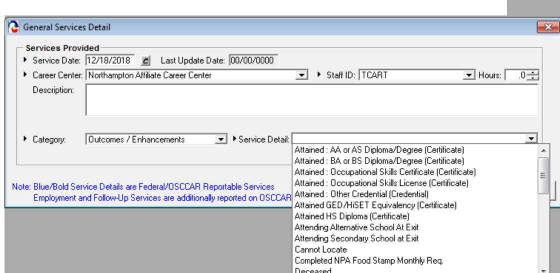
Assessment



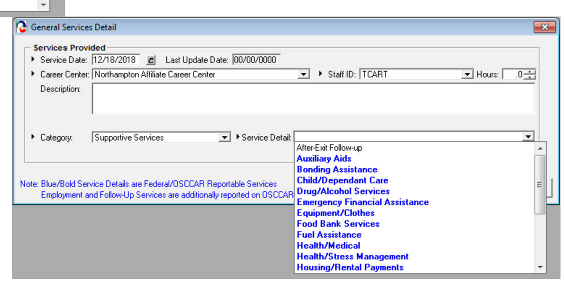
Career Planning



Counseling

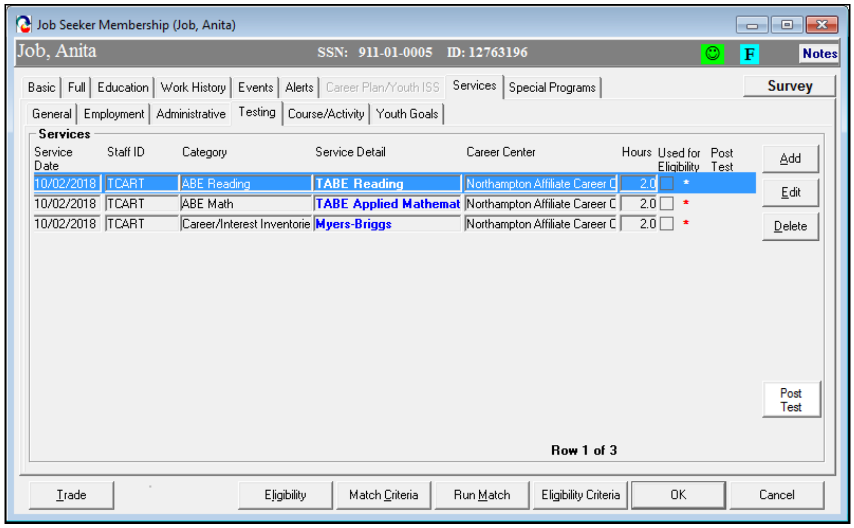


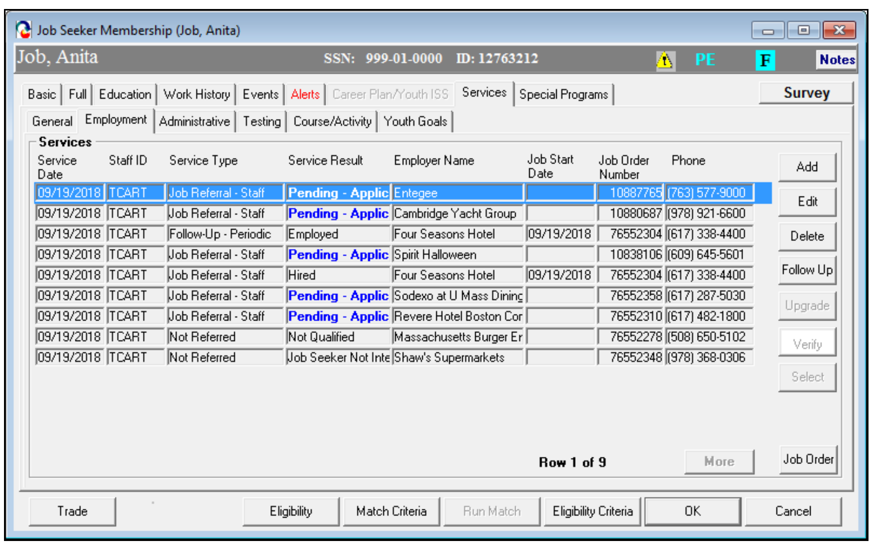
Outcomes/ Enhancements



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.

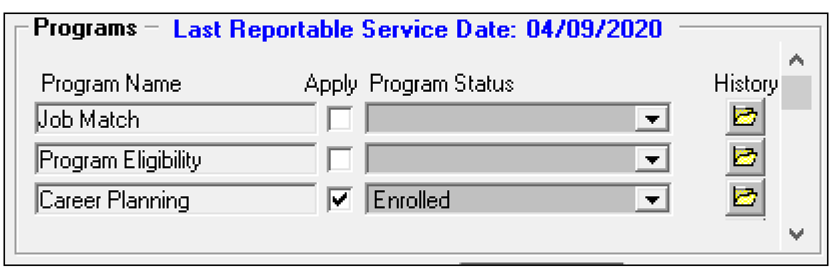
When the Customer is successfully assigned a case worker, the following icon (a "**C**" over an "**P**") appears on his/her membership.

To Select Career Planning for a Customer

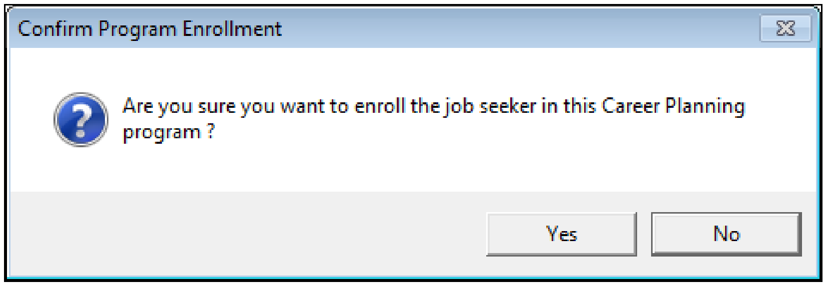
1. Open up your Customers record.

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

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

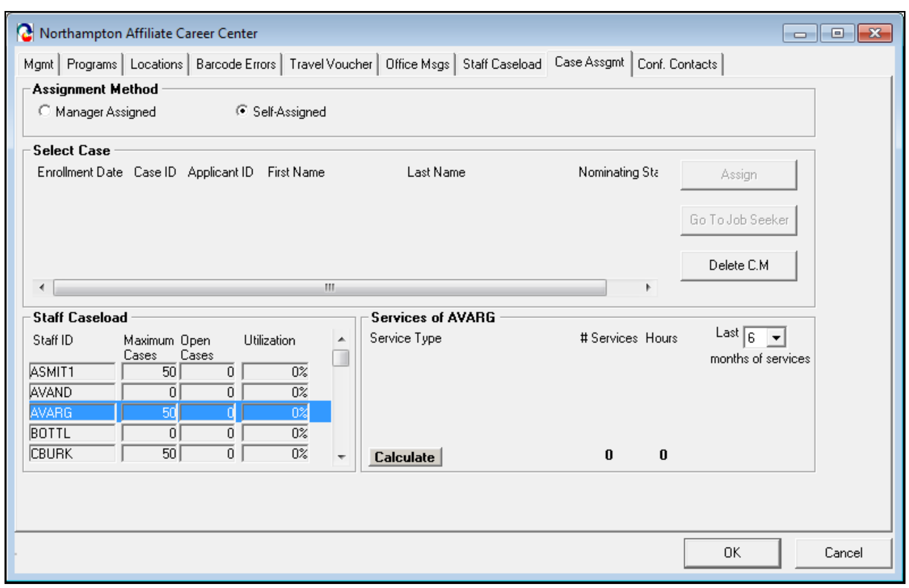


When MOSES asks you
"Are you sure you want to enroll this job seeker in this Career Planning program?"
click the **Yes** button.



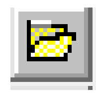
3. If your One-Stop Career Center has *selected* the **Self-Assigned** method for Career Planning, you will be the assigned case worker. You will be able to enter information in the **Case Plan** tab.
You must refresh your view of the Customer's record to access the Career Plan tab. (*Another words,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

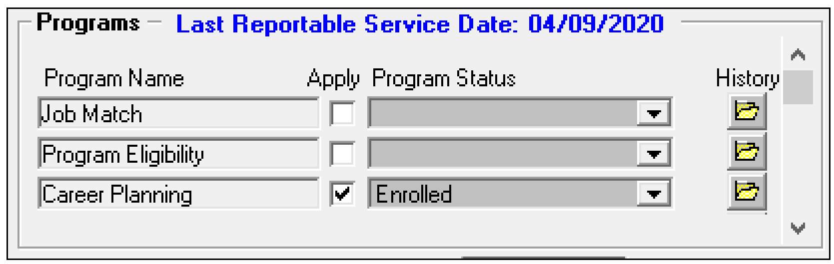
4. If your One-Stop Career Center has *selected* the **Manager-Assigned** method for career planning, you will have to nominate this Customer for Career Planning.
You must *wait* until the manager responsible for Career Planning assigns the customers career plan to you.
Only after that point will you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

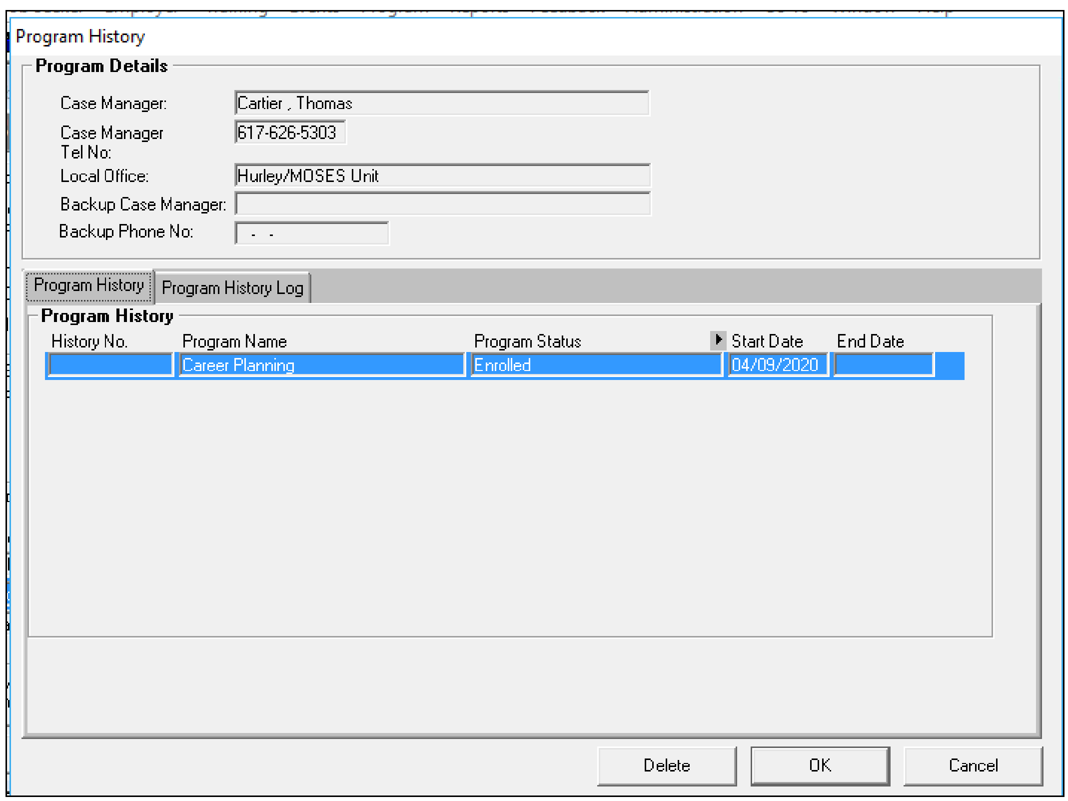


5. Once you have successfully enrolled the customer in Career Planning you will be assigned as the **primary caseworker**, this information will appear in the **Program History** folder for Career Planning.

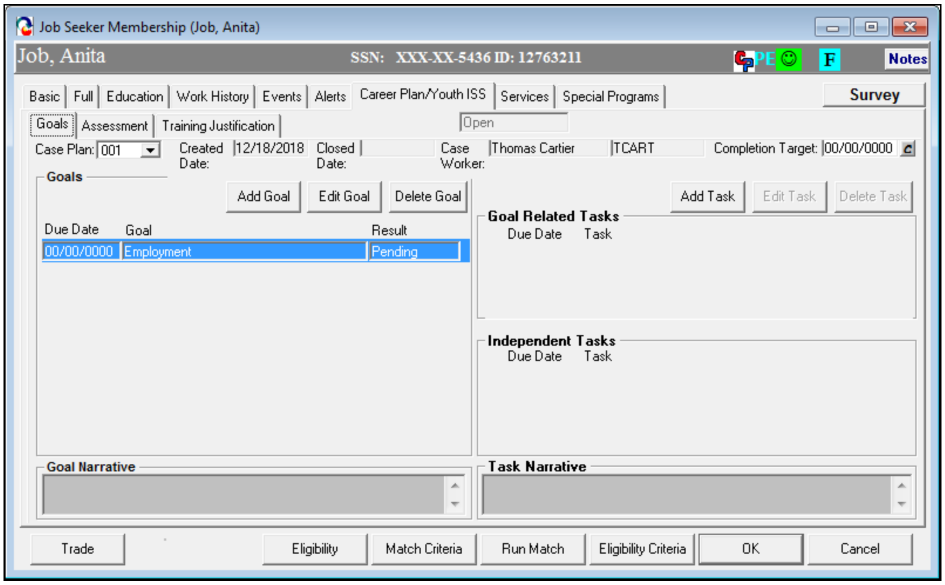
   Click the **History** folder for **Career Planning** in the **Programs** area of the **Basic** tab.







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



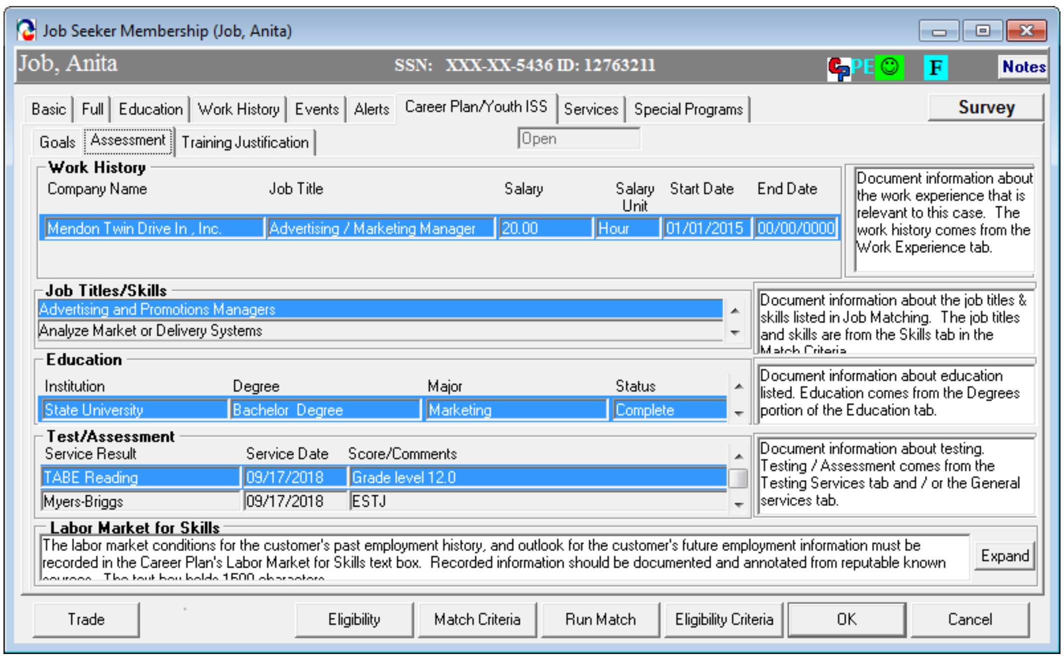
MOSES uses the date the caseworker was enrolled as the Created Date for the case plan. It also gives the full name and staff ID of the primary case worker.

Assessment

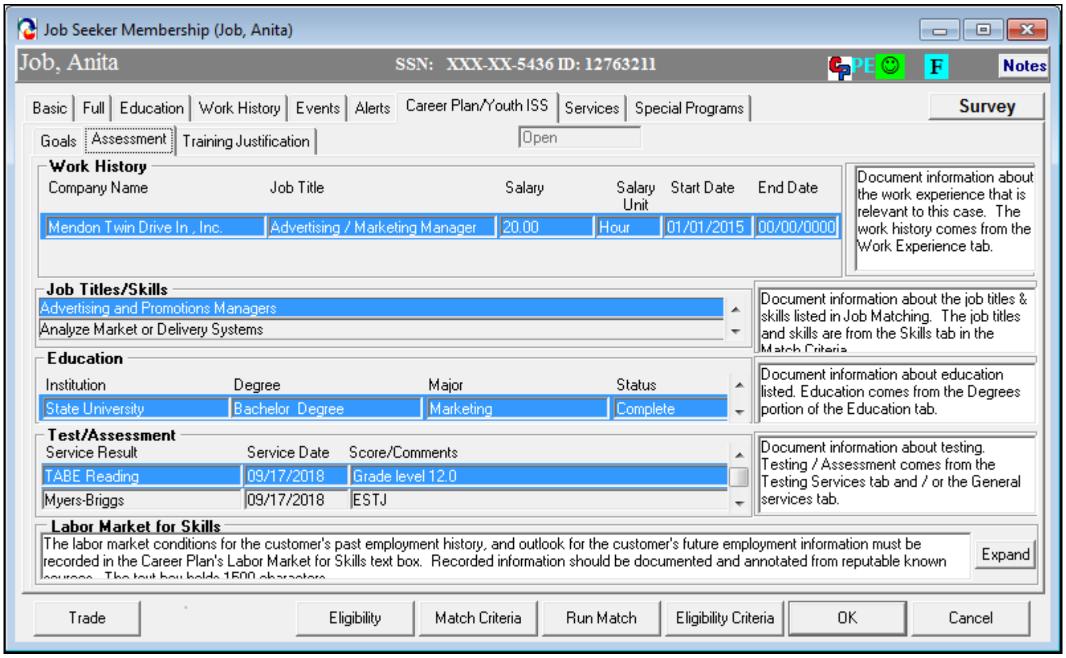
The Assessment Process

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.



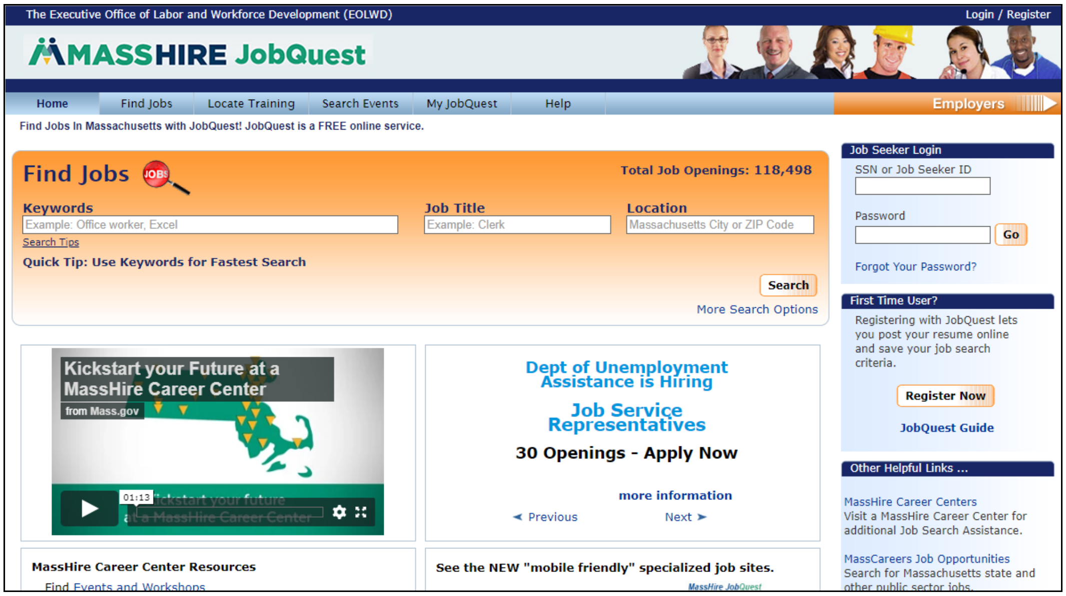
The **Work History** information comes from the Customer's **Work History** tab.

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.)

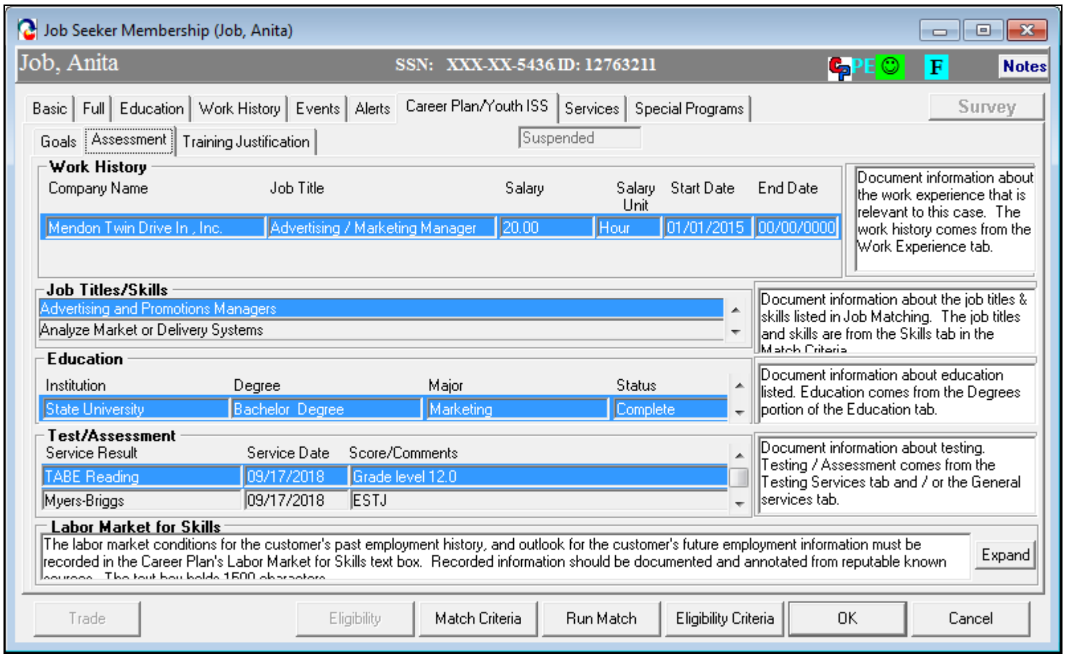
The **Test/Assessment** comes from the **Services tabs, General Services** and**, Testing** sub tabs.

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.



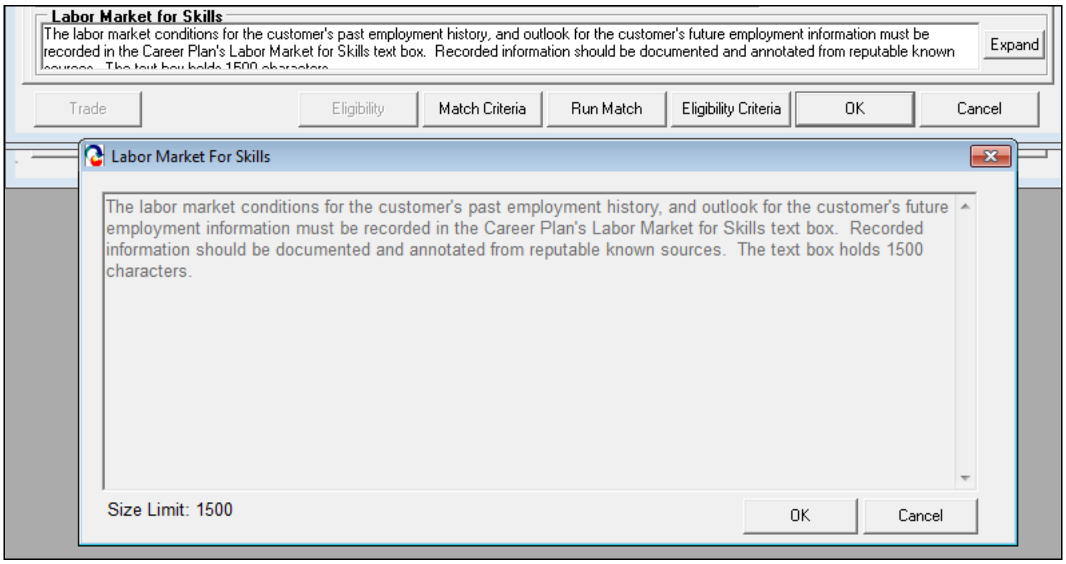
The caseworker's job will be easier if this information is entered at intake. With **MassHire Job Quest** (MJQ), the Job Seeker can enter and update this information on his or her own, while waiting for an appointment with the case worker.

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. *<u>It needs to be well documented</u>*.

   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.

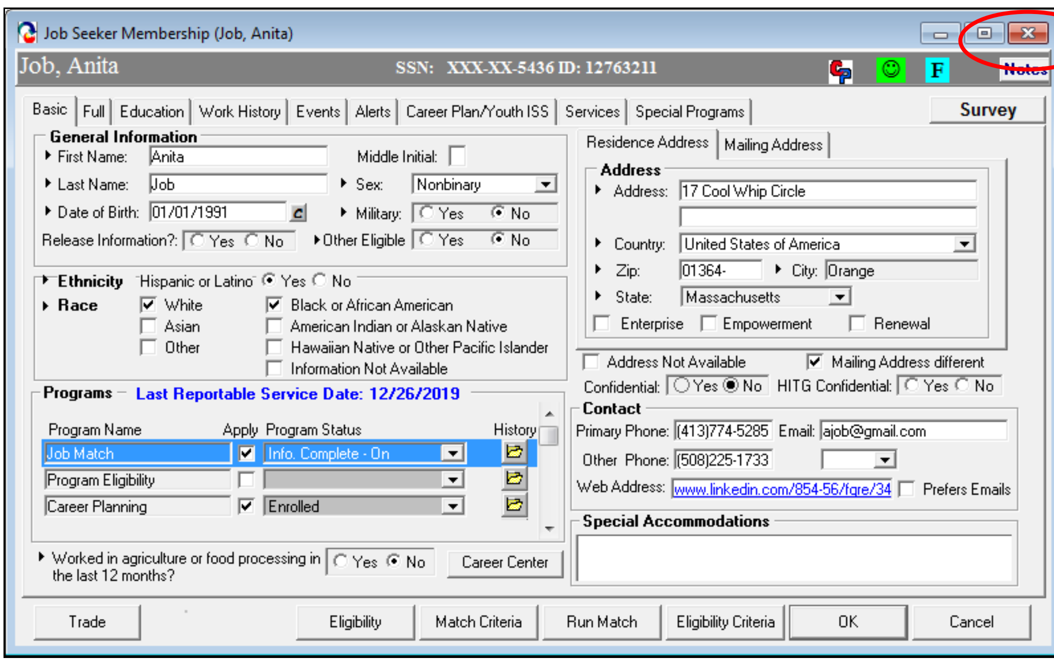
Notes

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.

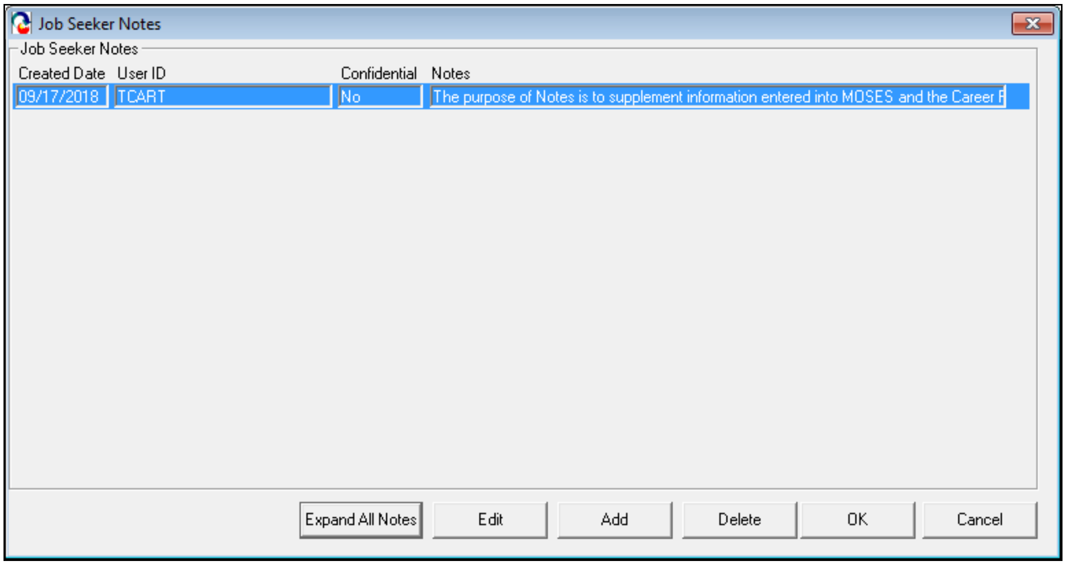
1. Click the **Notes** button to see the notes entered. You find this button on the top right corner of the header bar for the **Customer** record.

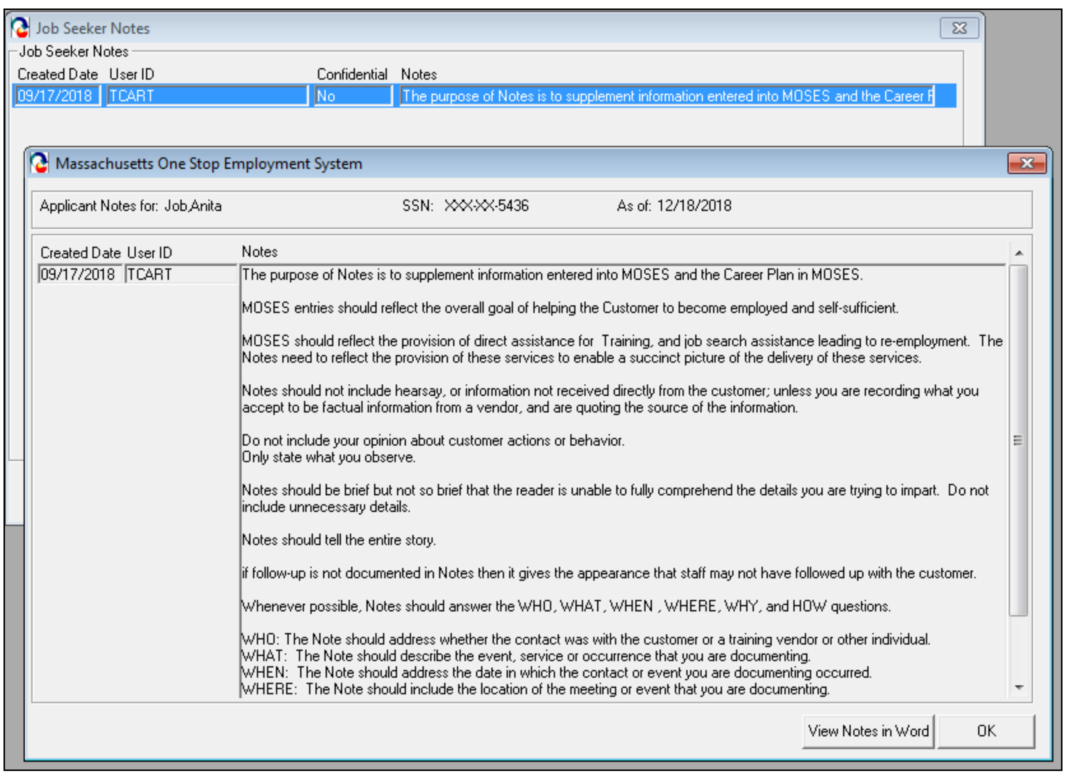


When notes are entered for a Customer, the **Notes** button turns **blue and bold**. This is a visual cue to tell you if notes are entered.

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**.

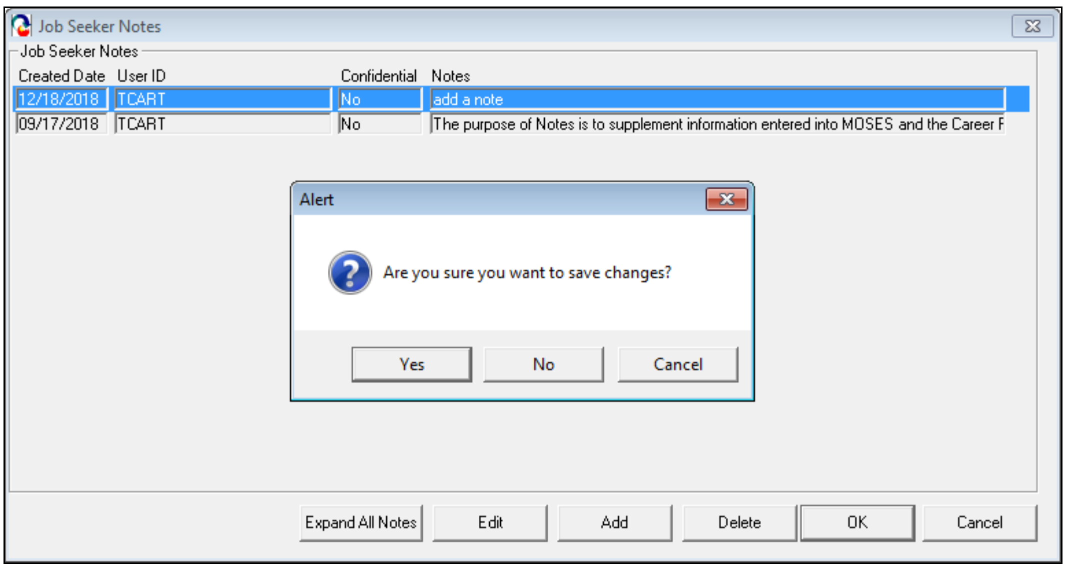
   Click the **Yes** button to save the note.

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

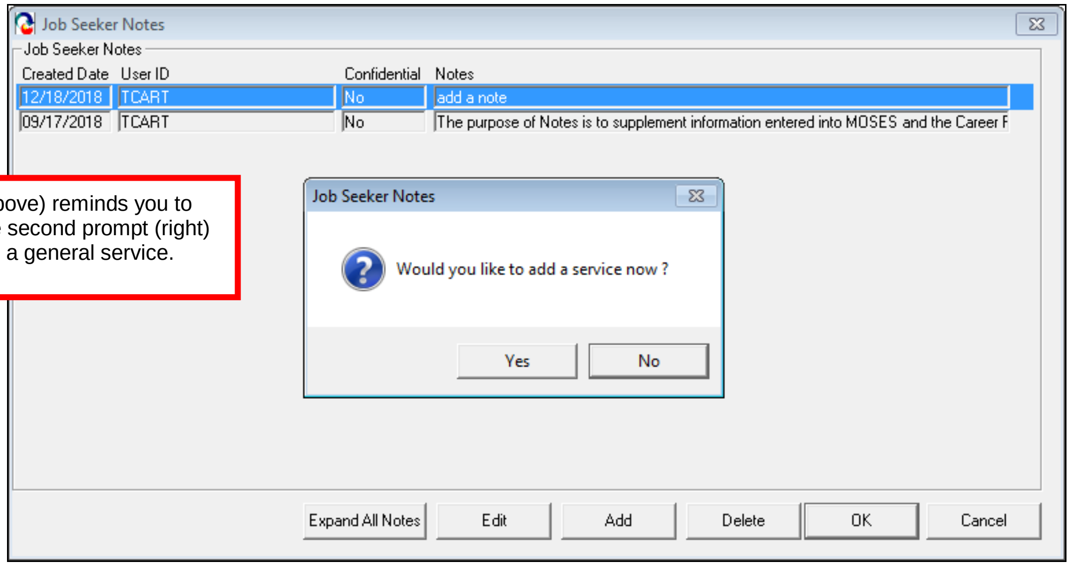
   If you click **Yes**, the **General Services Detail** appears.

   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.

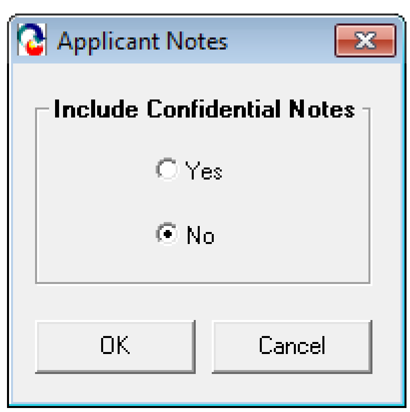
8. Click the **Expand All Notes** button to see all the notes at once.

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

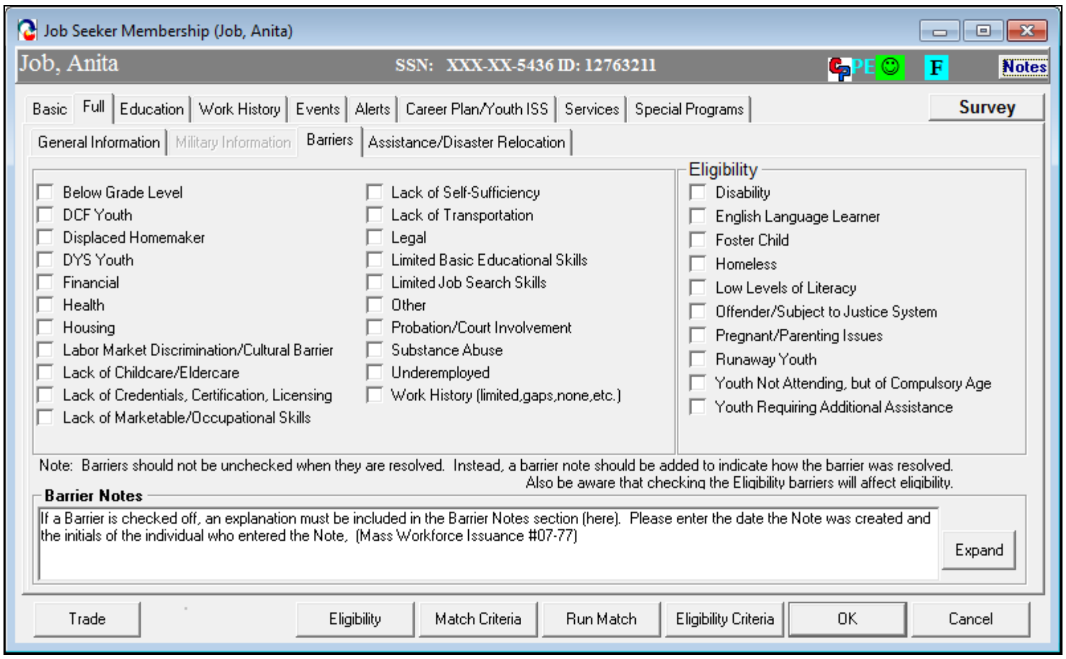
Date Printed: 12/18/2018

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

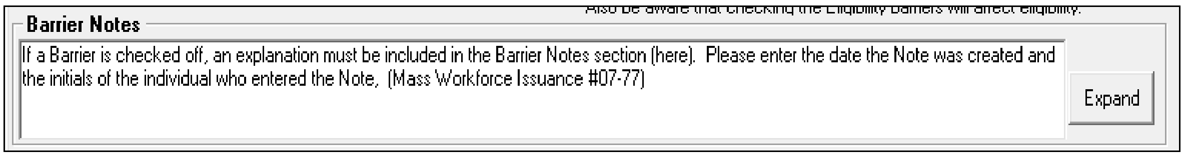
Use the **Barriers** sub tab on the **Full** tab to accurately record the things that impact the Customer's potential success in training, job search, and / or sustained employment.

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

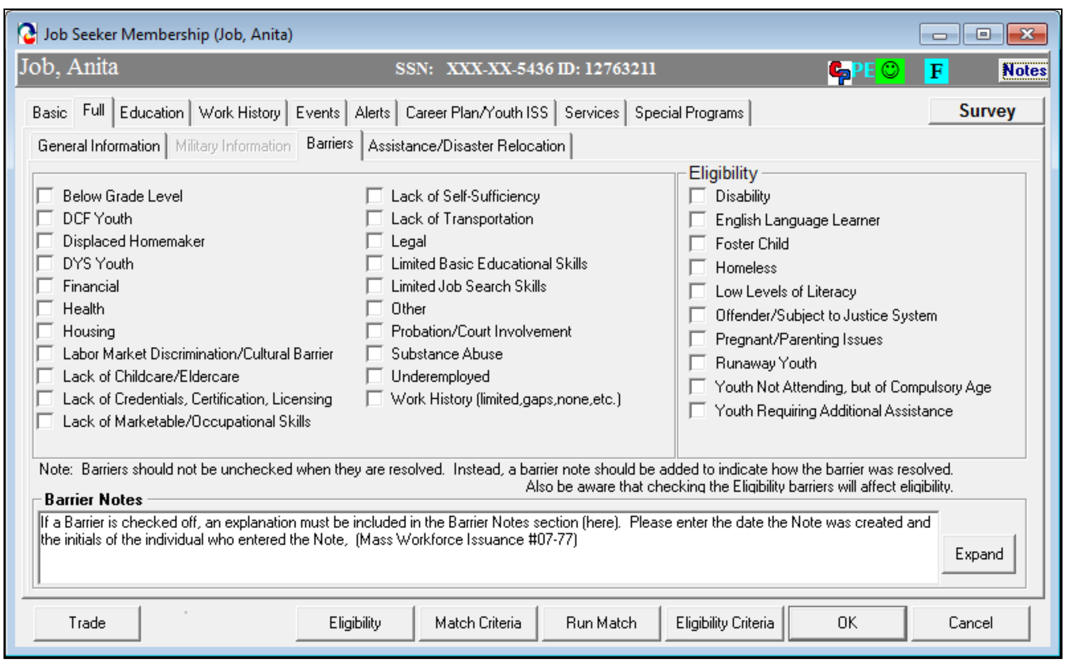


2. The list of **Barriers** is shown.

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.)*

Barriers (Eligibility Barriers)

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)

Term	**Definition**
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.)*

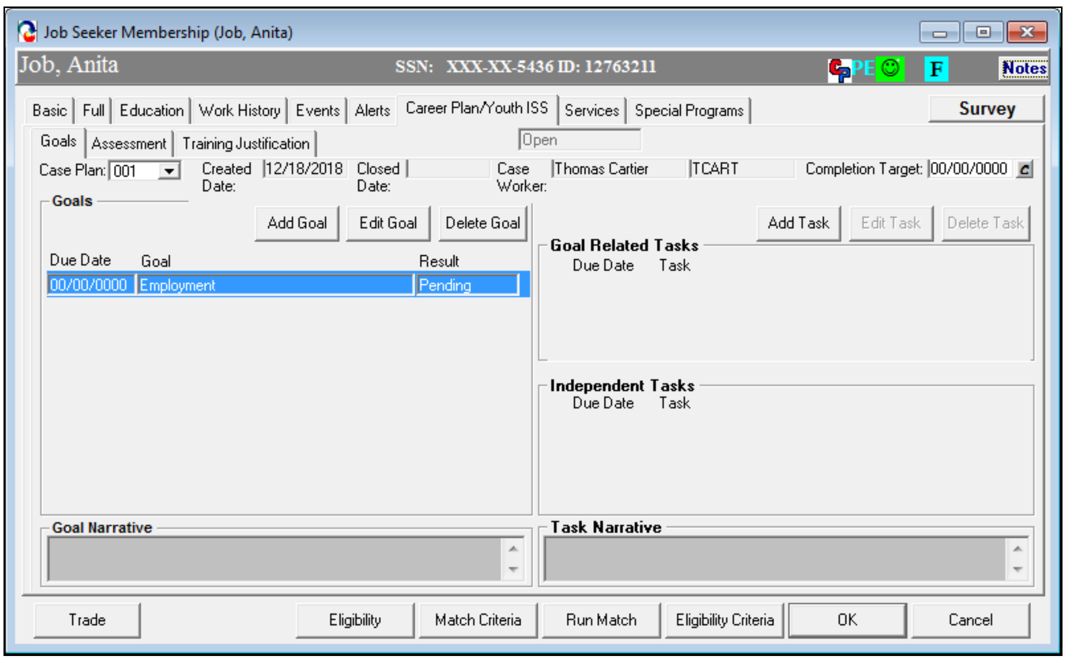
Goals and Tasks

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 <u>gainfully</u> 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.

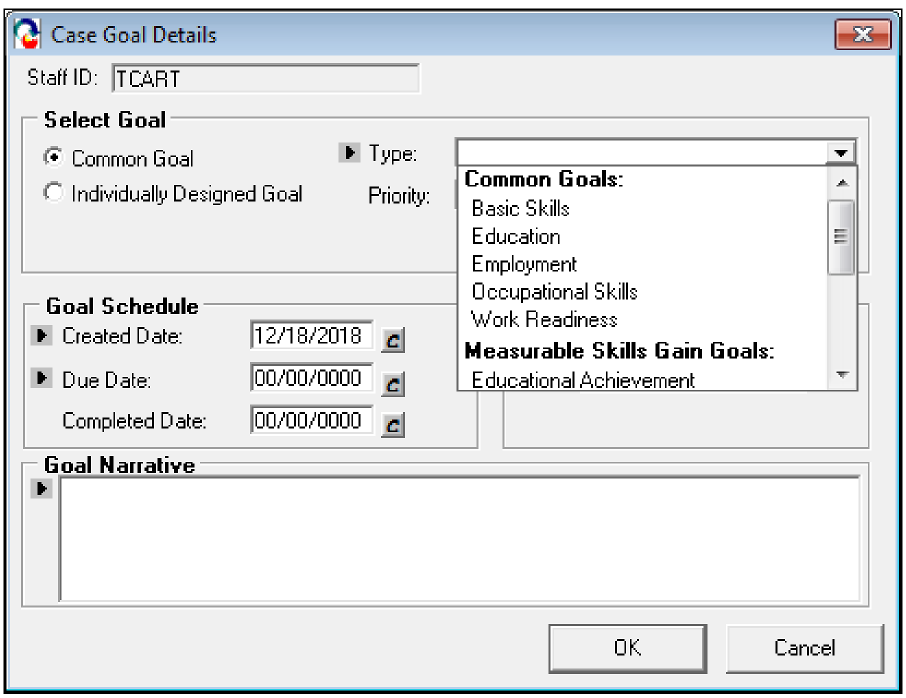
No goals can be entered with a Created Date that is before the date the Customer was enrolled in Career Planning and assigned a caseworker. You cannot enter a Created Date prior to the date you were assigned as the primary case worker.

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*.

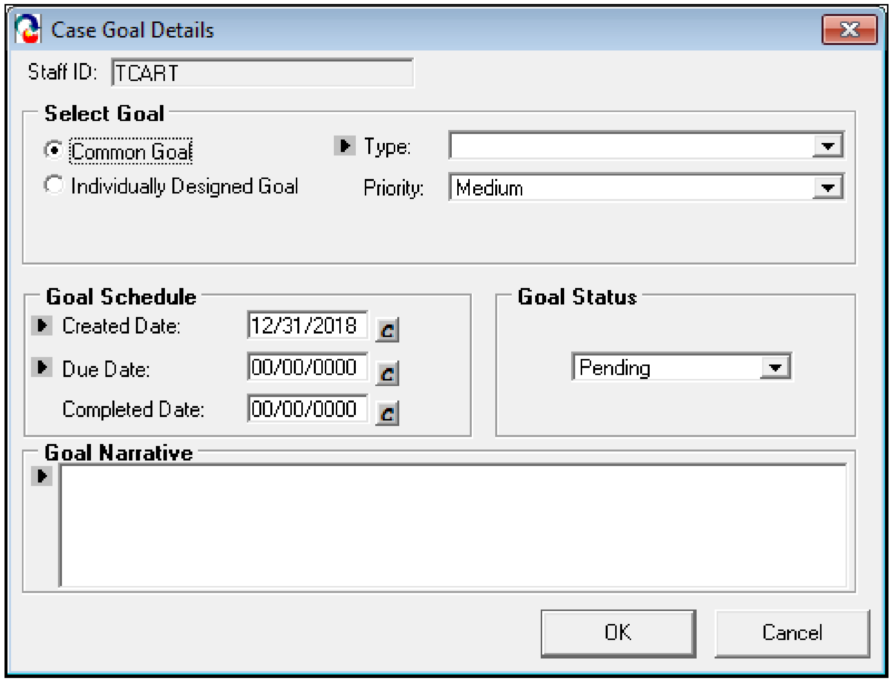
Individually Designed Goals are those that don't directly fall into the five **Common Goal** areas, but are needed to support this customer's career plan.
These goals can involve things such as ensuring that transportation is always available or that the customer eliminates habits that contradict the 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.



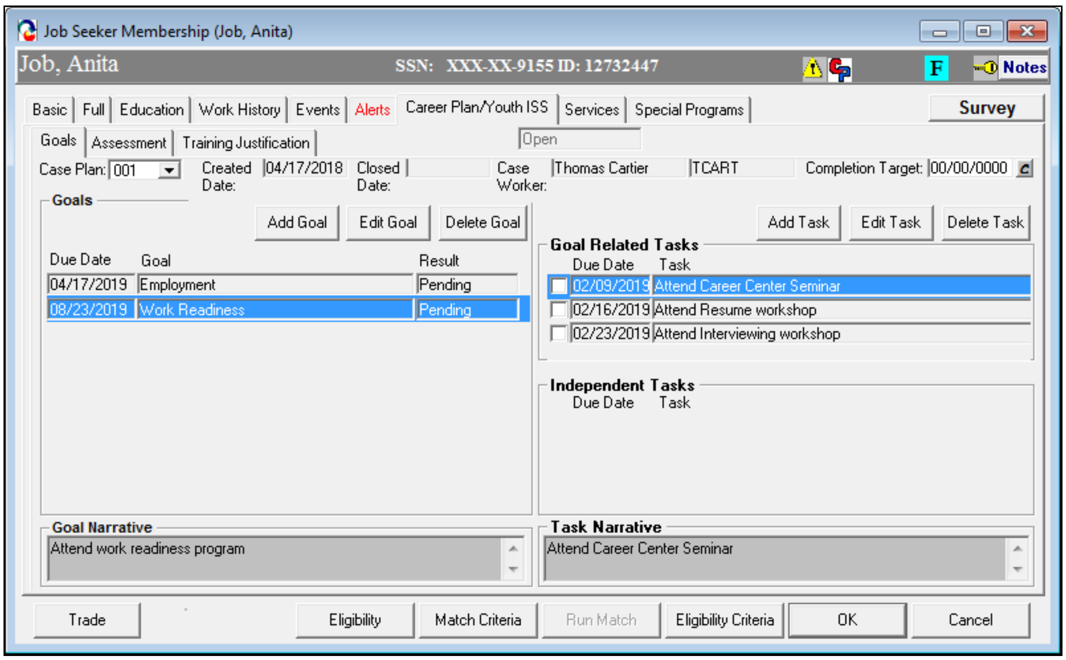
5. Enter a realistic **Due Date** for the Customer to achieve the goal.

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.

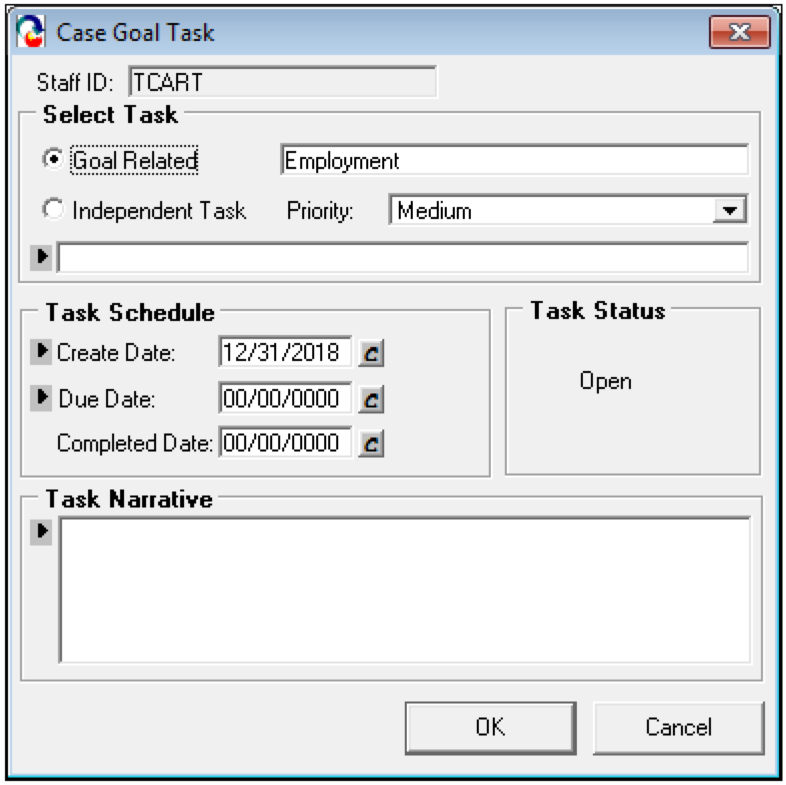


2. Highlight the **Goal** where you want to add a task, then click the **Add** or **Edit Task** button.

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.



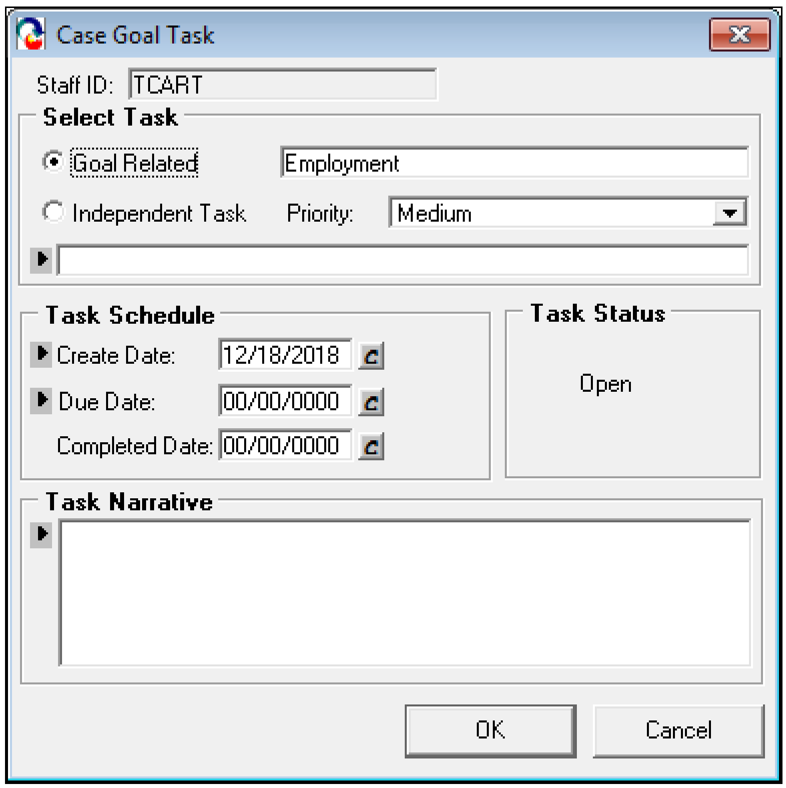
Enter a description in the **Task Narrative** box describing this **Independent Task**.

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.



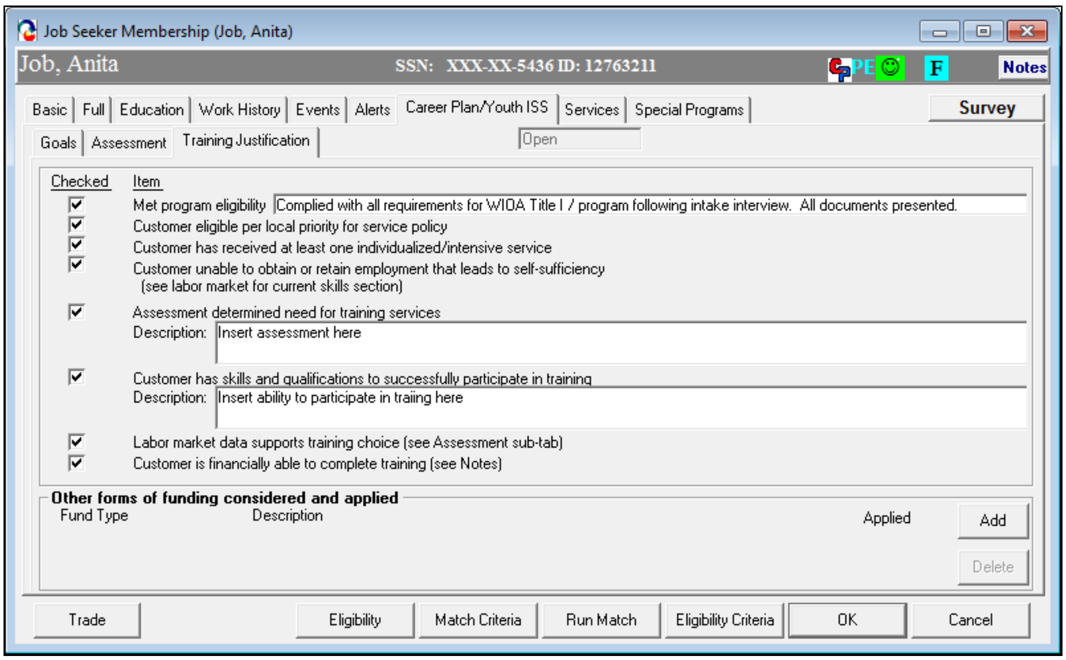
MOSES assigns all **Goal Related** tasks to the Goal that was highlighted before you clicked the **Add Task** or **Edit Task** buttons.
Tasks can relate to any **Common Goal** created, to any **Individually Designed Goal**, or can be totally independent of any created goal.
The last group appears in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

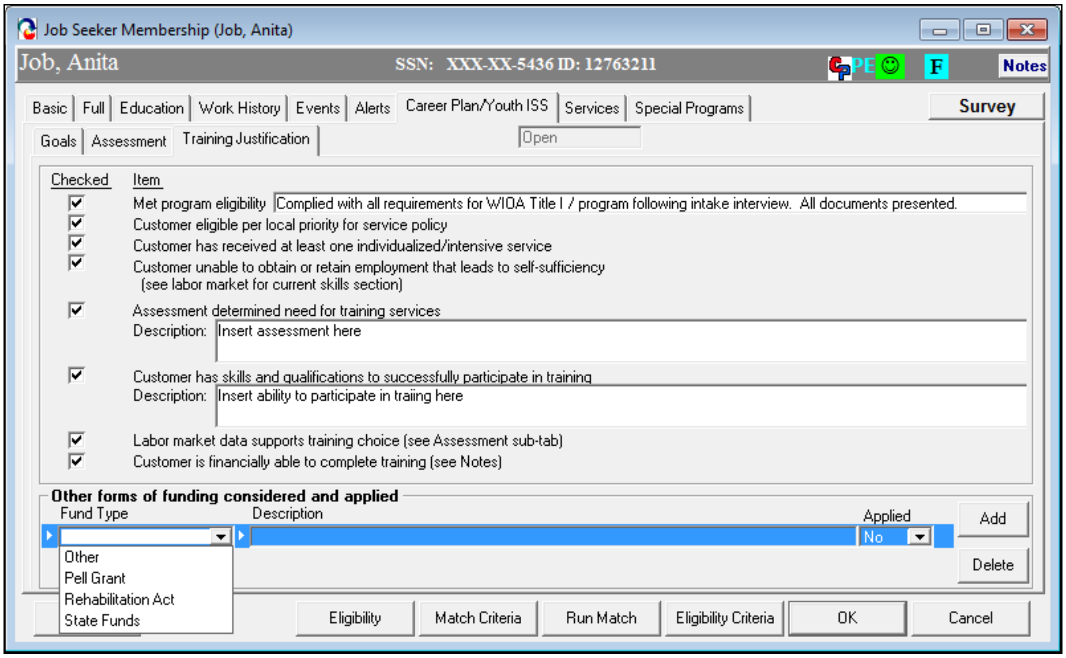


2. Some items checked will bring up a text box.

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**.

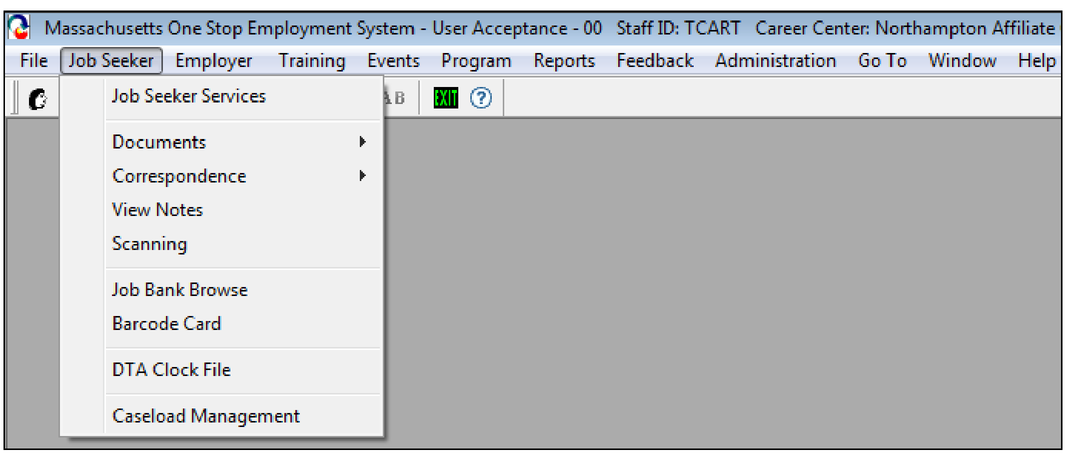
In addition, you can add ticklers to help you organize your cases, and view all cases where you have been assigned as a back-up worker.

View Your Assigned Cases

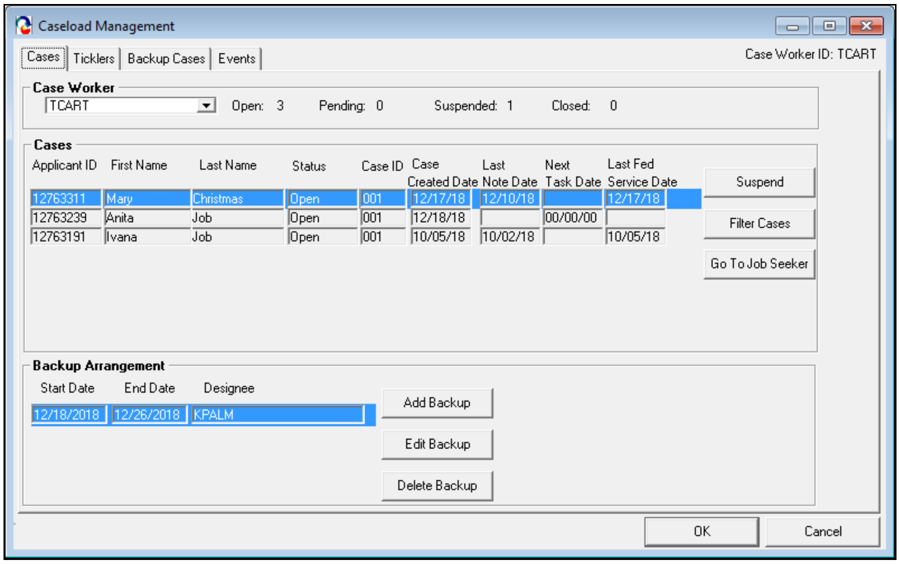
While you can look at each of your cases individually, the **Caseload Management** option from the **Job Seeker** listing on the Main Menu bar allows you to see all your cases at once.

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.

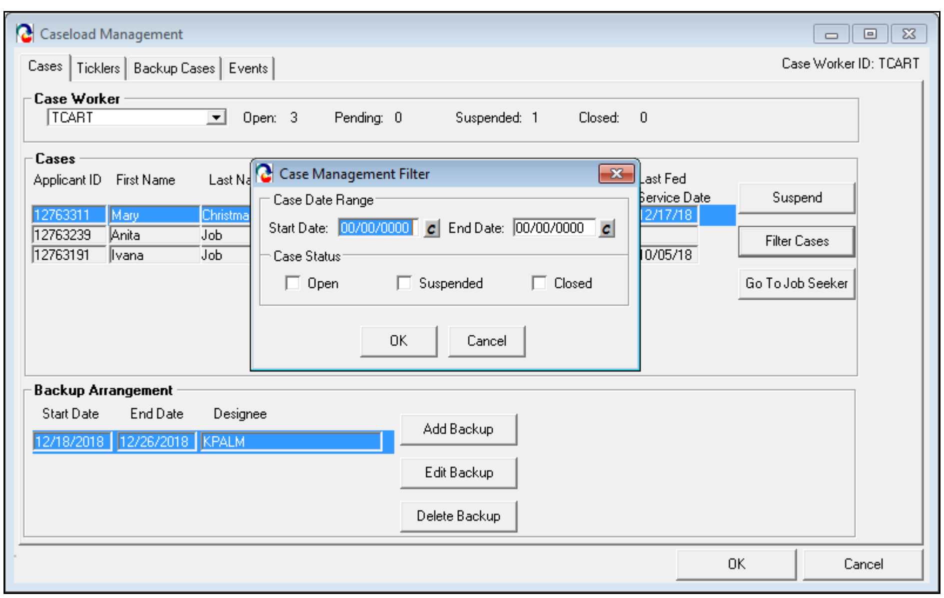


3. You come to the **Caseload Management** screen, with the first tab labeled: “**Cases**”.
   This is where you can see all the *open* cases you have been assigned, including the Applicant ID, Case Id, the Case Created Date, the last date a Note was entered, the date for the earliest uncompleted task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

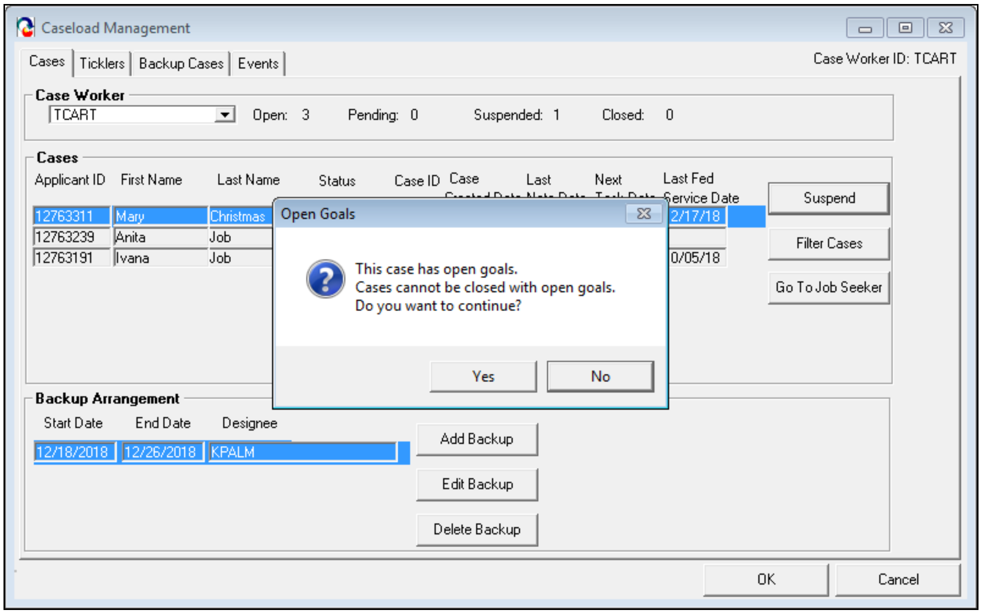
5. Click the **Filter Cases** button.



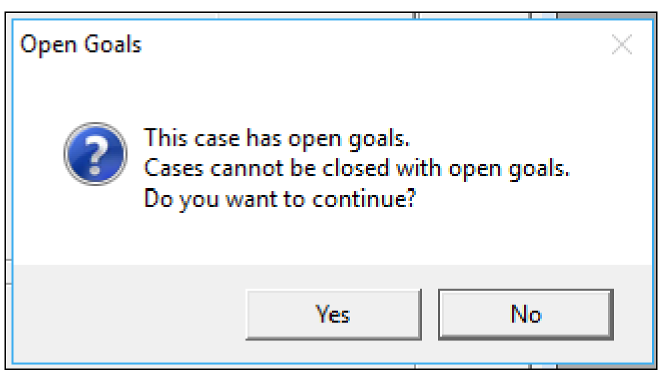
6. You may choose your **Cases** view by changing the **Start Date**, the **End Date**, the **Case Status**, *or* any combination of these fields.

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.



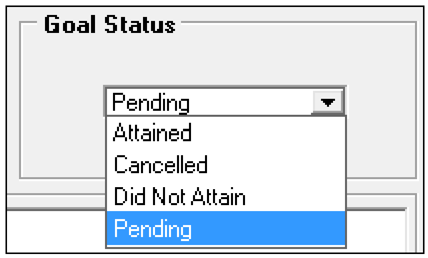
Note: the pop up.
"*This case has open goals.*
Cases cannot be closed with open goals.
Do you want to continue? "



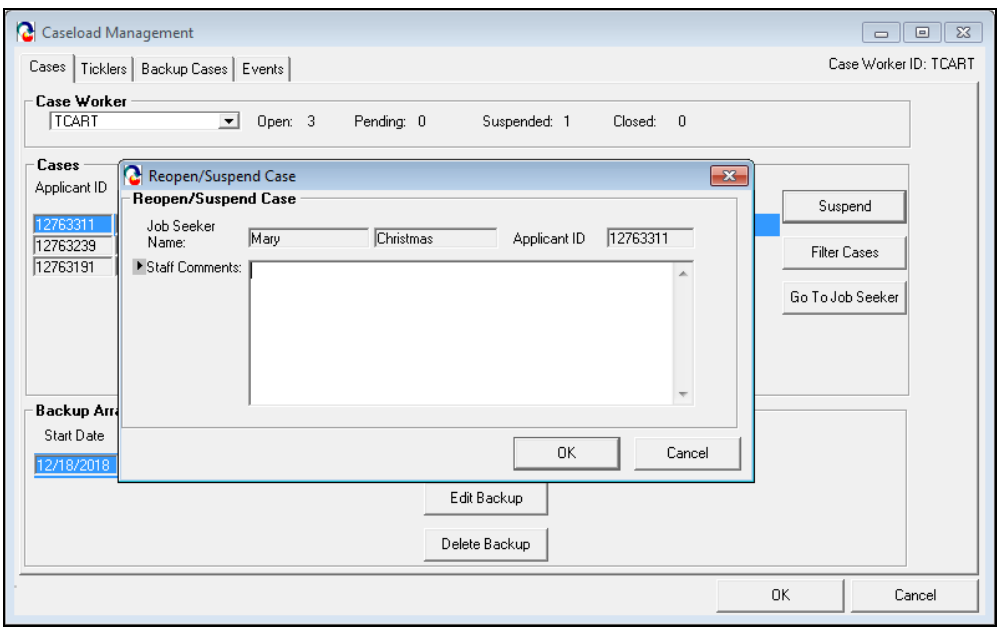
The Pop Up refers to if you are trying to **Close** the Career Plan.

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.

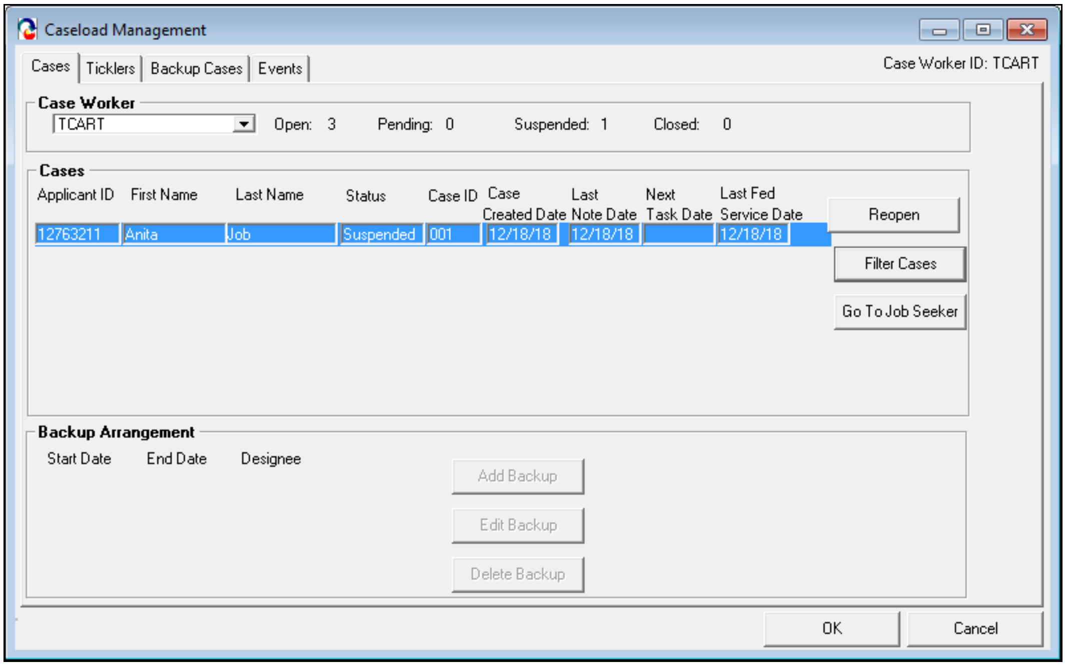
A **Goal Status** of **Pending** means that you are working on this goal.



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.

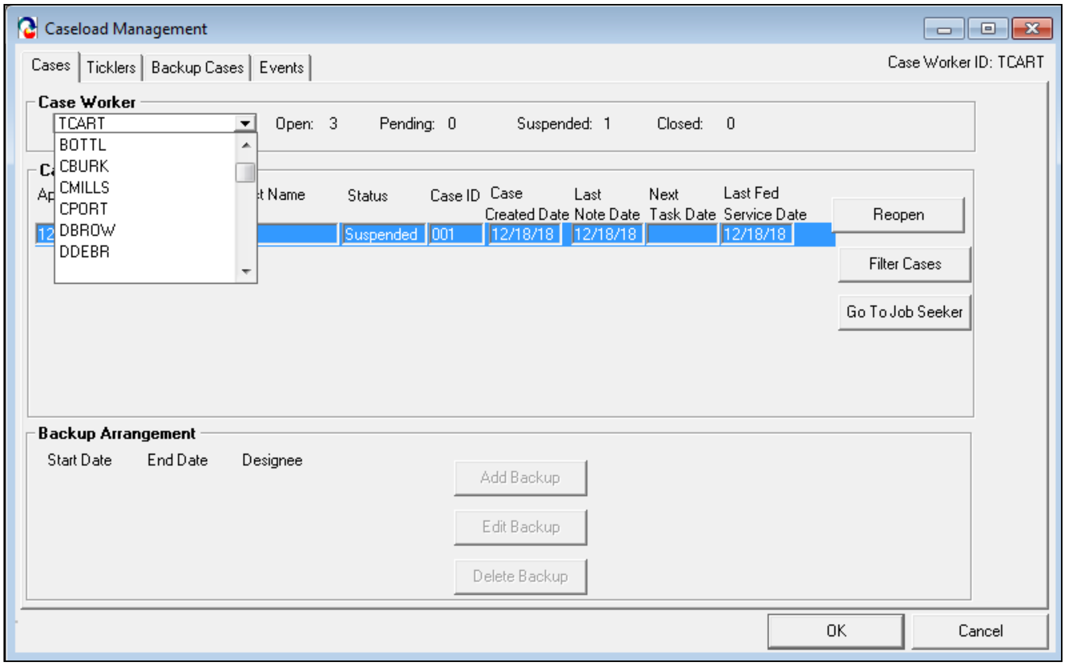


10. The last button in this portion of the **Cases** tab, **Go To Job Seeker**, allows you to open the Job Seeker record.

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.



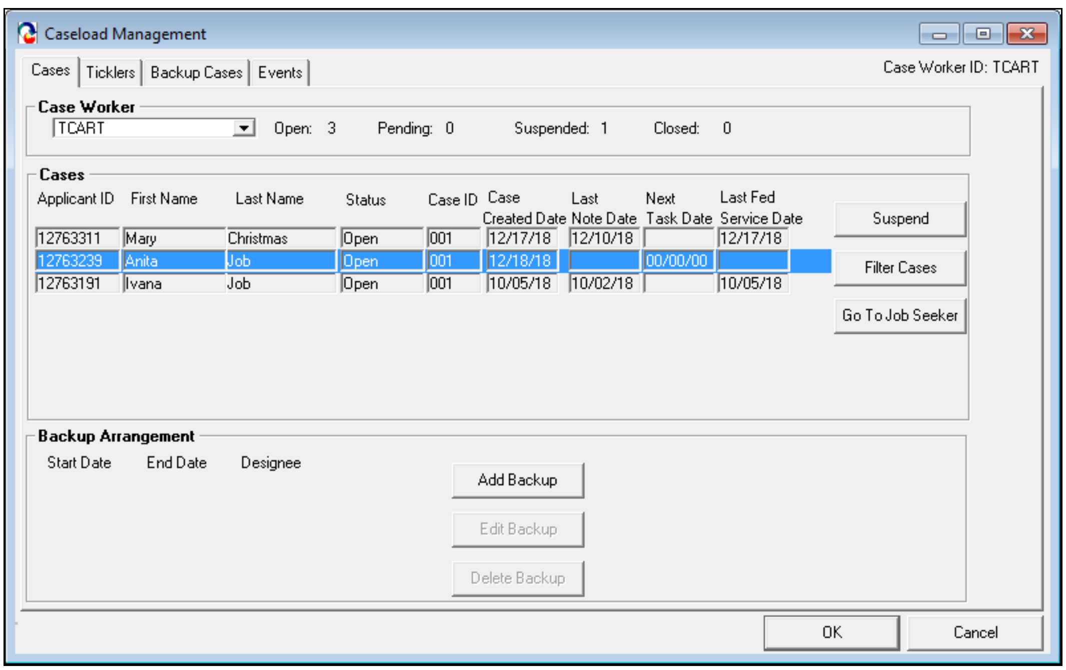
12. This view gives you an idea of each case worker's caseload. This can help you choose back-up case worker(s) for your caseload if you need a backup.

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.

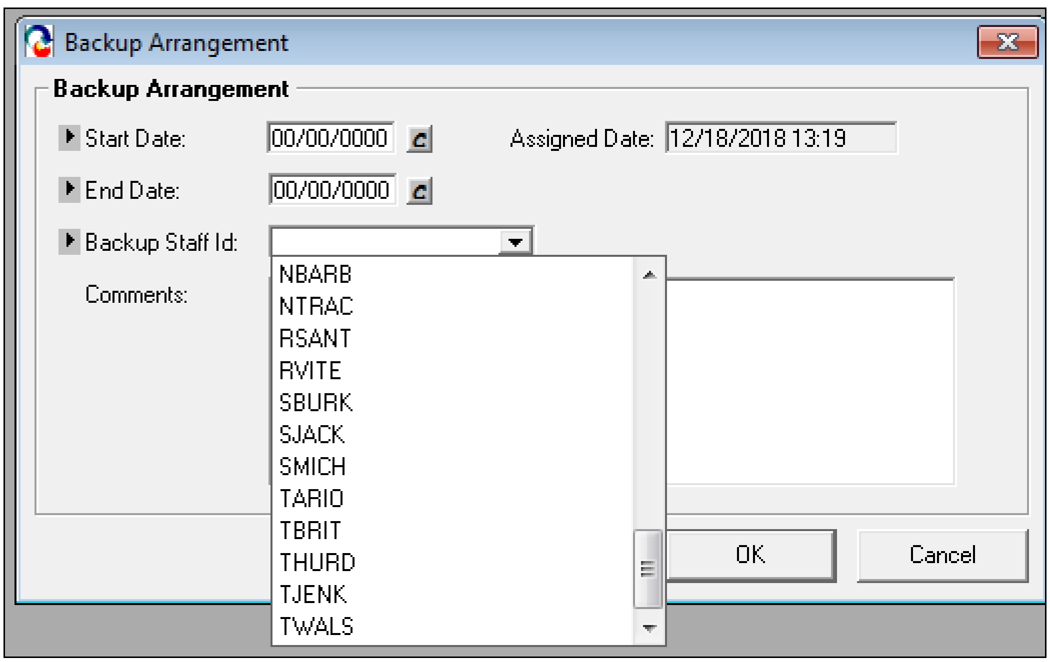
1. Highlight the case where you want to assign Backup caseworker(s).
You may assign more than one back-up caseworker to each case.



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.

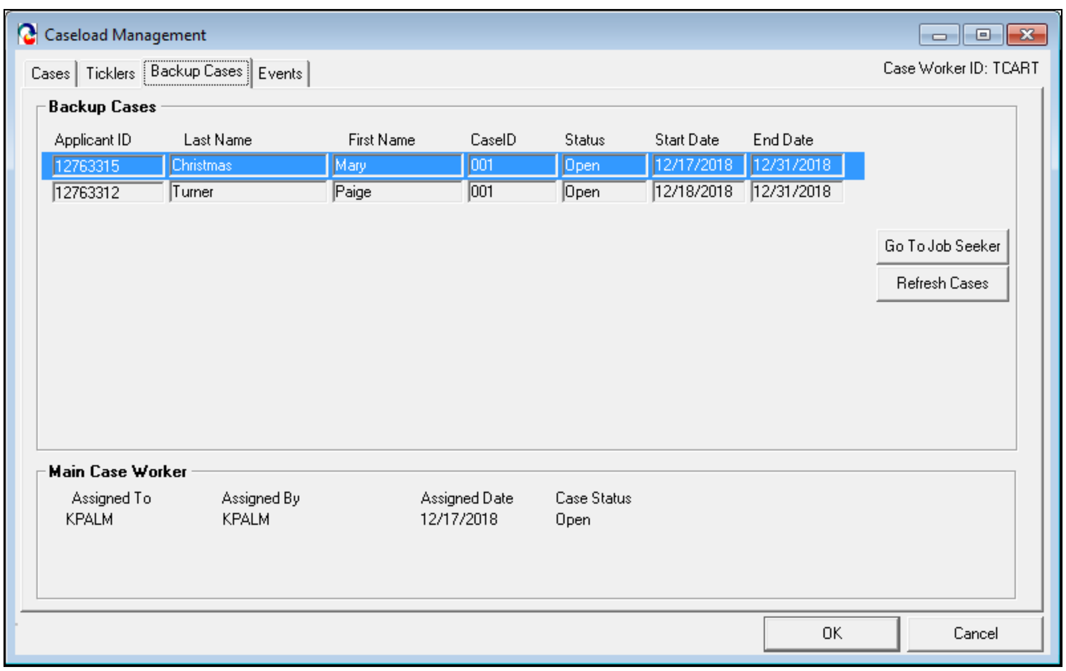
You are the Backup

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.

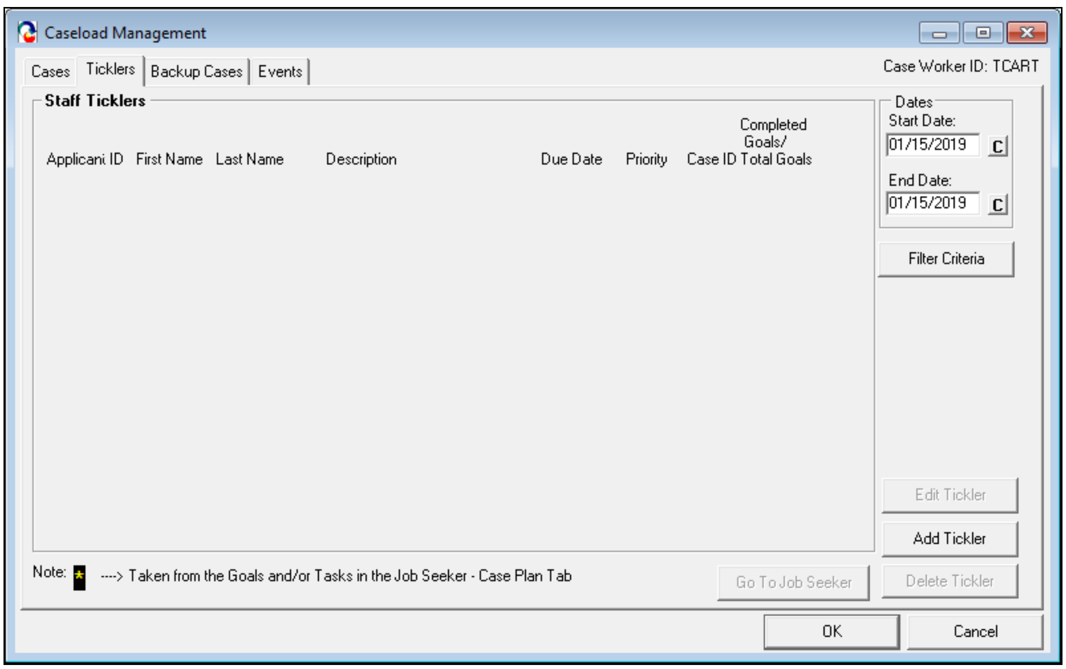
4. Click on the **Refresh Cases** button to change the list to match the **Case Worker ID** shown on the top right corner.
This **Case Worker ID** is the one selected on the **Cases** tab.

Ticklers

View Ticklers for Your Assigned Caseload

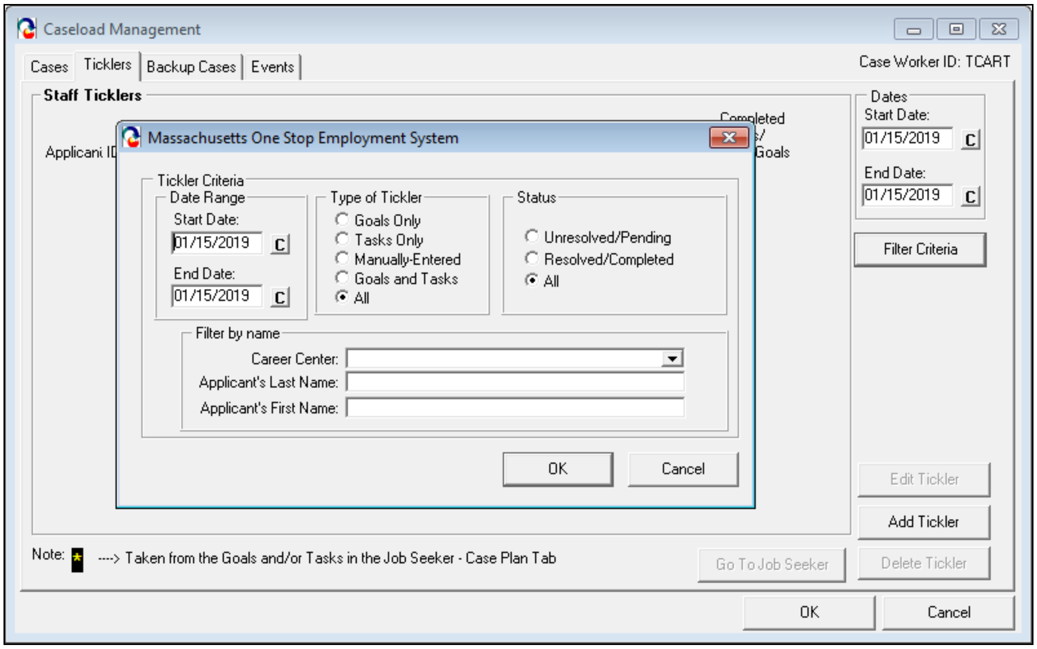
Ticklers is a way for you to see which of the Customers assigned to you are supposed to be working on their goals.
The **Ticklers** tab has the look and feel of the **Events** module.
Not only are all the **Goals** and **Tasks** assigned to your cases brought up here, but you can also create your own 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.

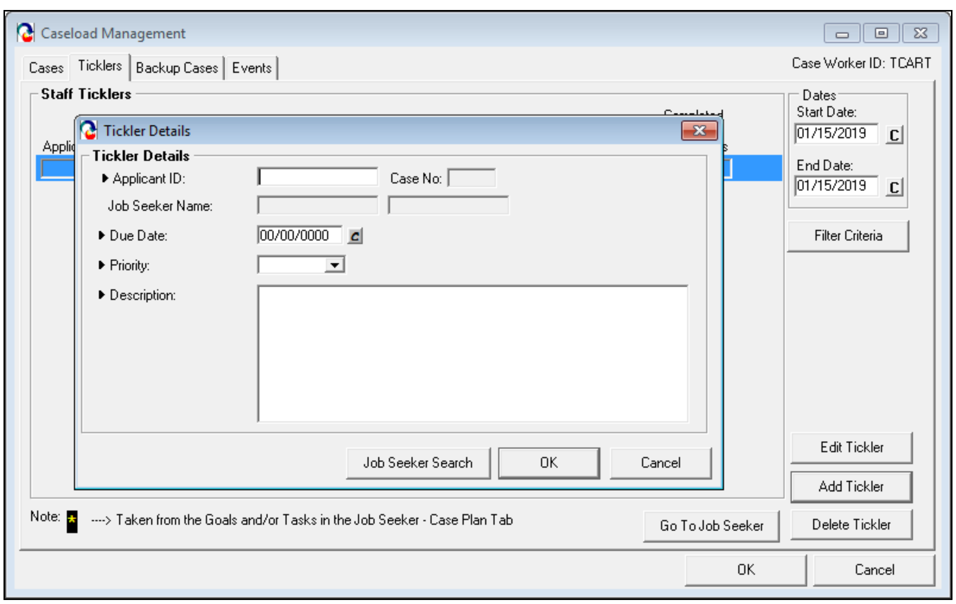


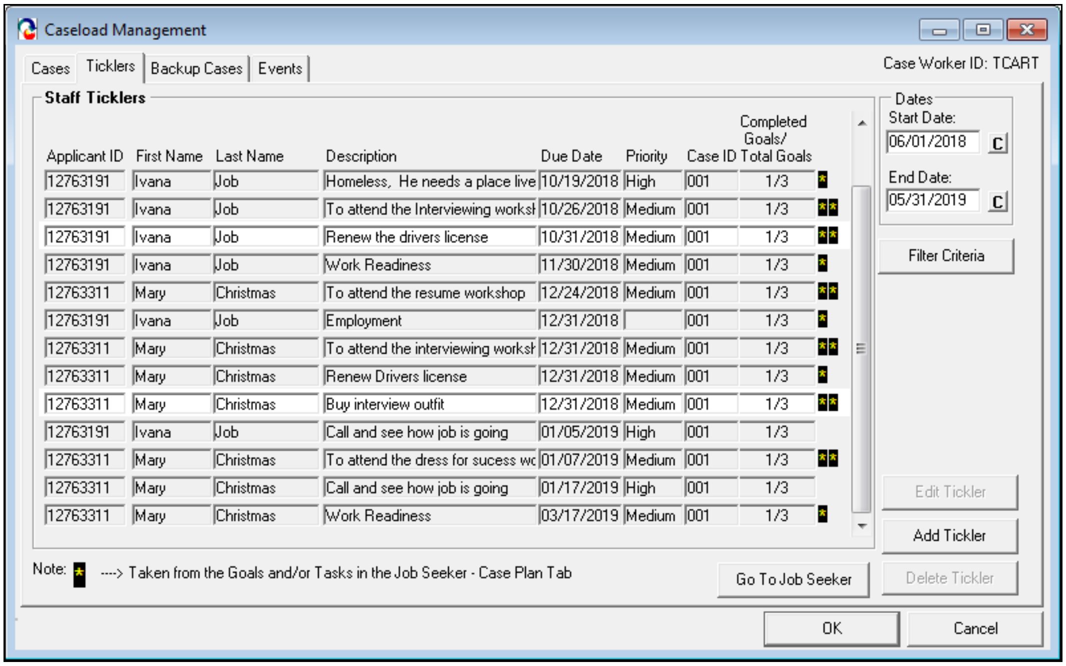
2. Use the **Start Date** and **End Date** fields to bring up your relevant ticklers. The default for both dates is *today's* date.

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.




Caseload Management

Cases | Tickers | Backup Cases | Events

Case Worker ID: TCART

Staff Ticklers

Applicant ID	First Name	Last Name	Description	Due Date	Priority	Case ID	Completed Goals/ Total Goals	
12763191	Ivana	Job	Homeless, He needs a place live	10/19/2018	High	001	1/3	*
12763191	Ivana	Job	To attend the Interviewing worksh	10/26/2018	Medium	001	1/3	**
12763191	Ivana	Job	Renew the drivers license	10/31/2018	Medium	001	1/3	**
12763191	Ivana	Job	Work Readiness	11/30/2018	Medium	001	1/3	*
12763311	Mary	Christmas	To attend the resume workshop	12/24/2018	Medium	001	1/3	**
12763191	Ivana	Job	Employment	12/31/2018		001	1/3	*
12763311	Mary	Christmas	To attend the interviewing worksh	12/31/2018	Medium	001	1/3	**
12763311	Mary	Christmas	Renew Drivers license	12/31/2018	Medium	001	1/3	*
12763311	Mary	Christmas	Buy interview outfit	12/31/2018	Medium	001	1/3	**
12763191	Ivana	Job	Call and see how job is going	01/05/2019	High	001	1/3	
12763311	Mary	Christmas	To attend the dress for sucess wo	01/07/2019	Medium	001	1/3	**
12763311	Mary	Christmas	Call and see how job is going	01/17/2019	High	001	1/3	
12763311	Mary	Christmas	Work Readiness	03/17/2019	Medium	001	1/3	*

Dates
Start Date: 06/01/2018 C
End Date: 05/31/2019 C

Filter Criteria

Edit Tickler

Add Tickler

Delete Tickler

Note: * ---> Taken from the Goals and/or Tasks in the Job Seeker - Case Plan Tab

Go To Job Seeker

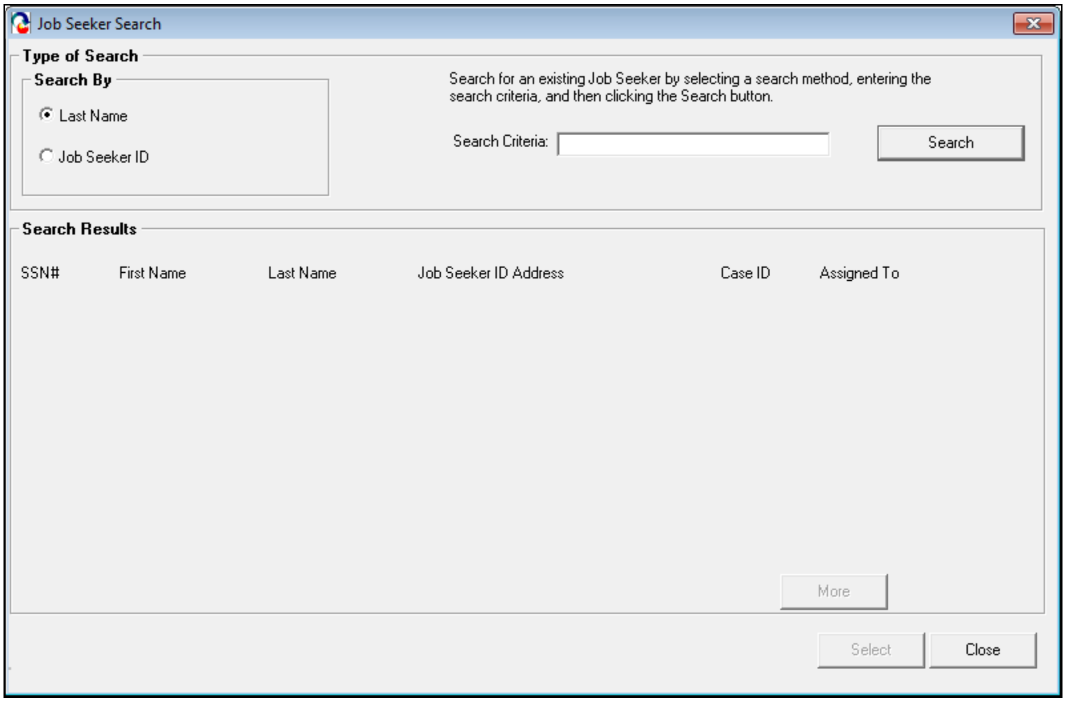
OK

Cancel

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.

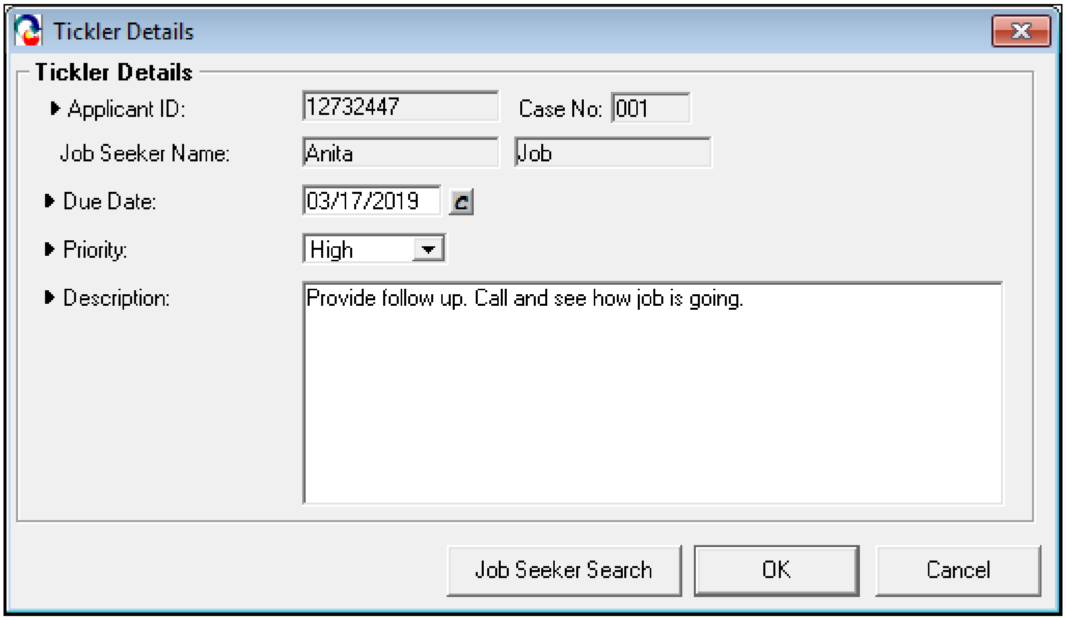


This **Job Seeker Search** screen differs a bit from the regular **Job Seeker Search** screen that appears when you click the **Job Seeker** icon or click the **Job Seeker** option from the **Main Menu** bar and select **Job Seeker Services**.
The two main exceptions include:
The first is there is no **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.

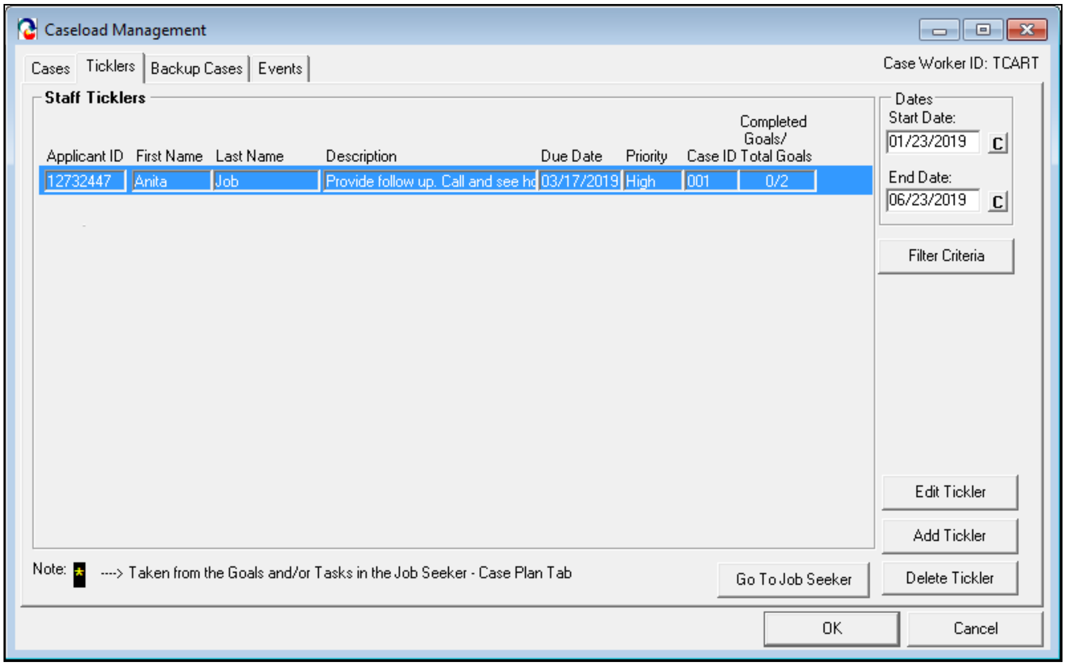
Remember that if you use the last name for your case search, you will only be allowed to select the Customer where you are the primary or backup caseworker.
MOSES brings up all job seekers that match the letters you type, but will give you a warning pop-up box if you chose a Customer not assigned to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

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

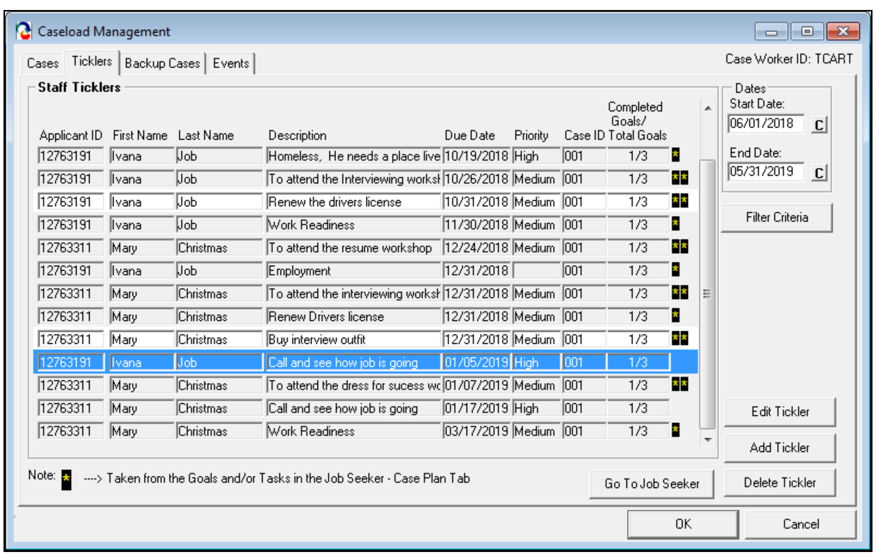
7. This brings you back to the **Ticklers Detail** screen.
Remember that all the fields here are required ▶.
MOSES completes those fields based on your use of the **Applicant Id** or the **Job Seeker Search** screen.



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.

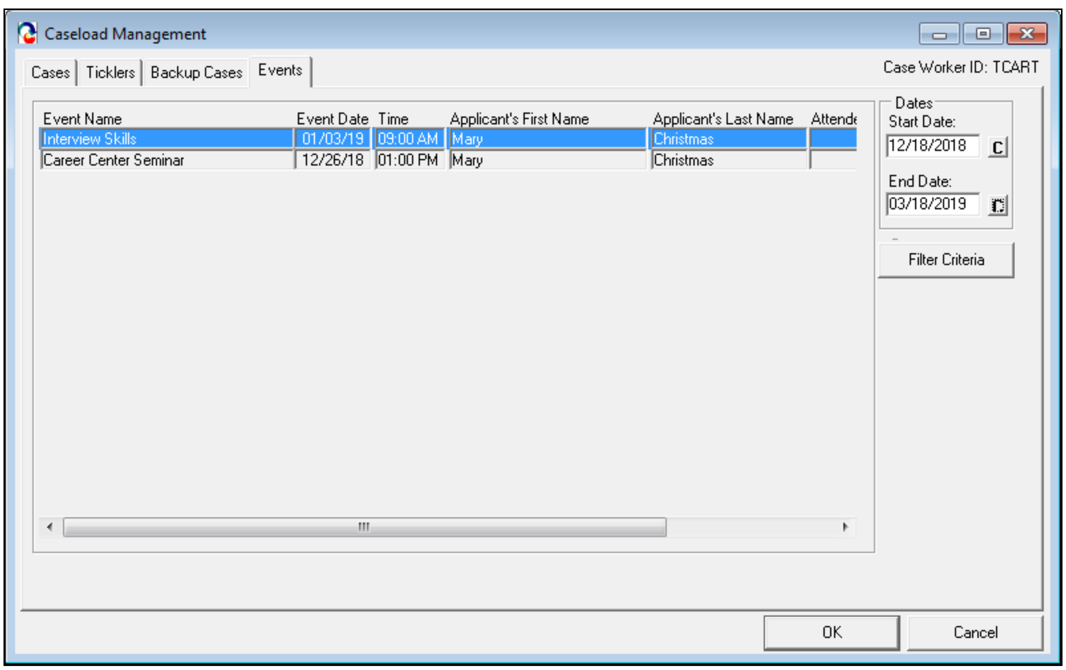
Events

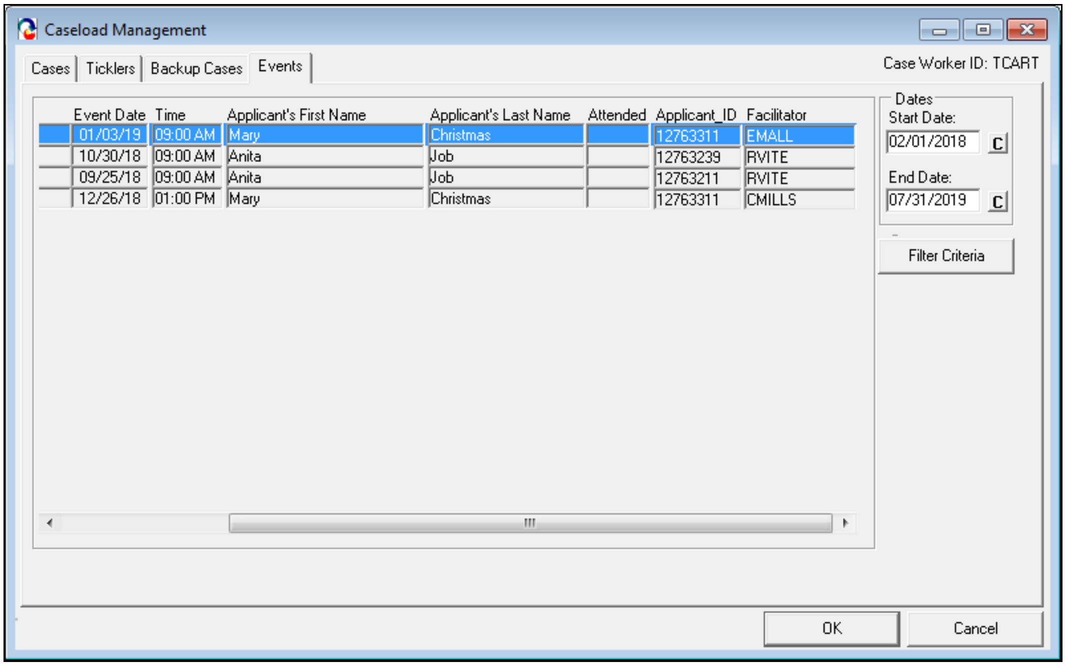
View Current and Past Events for Your Assigned Caseload

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

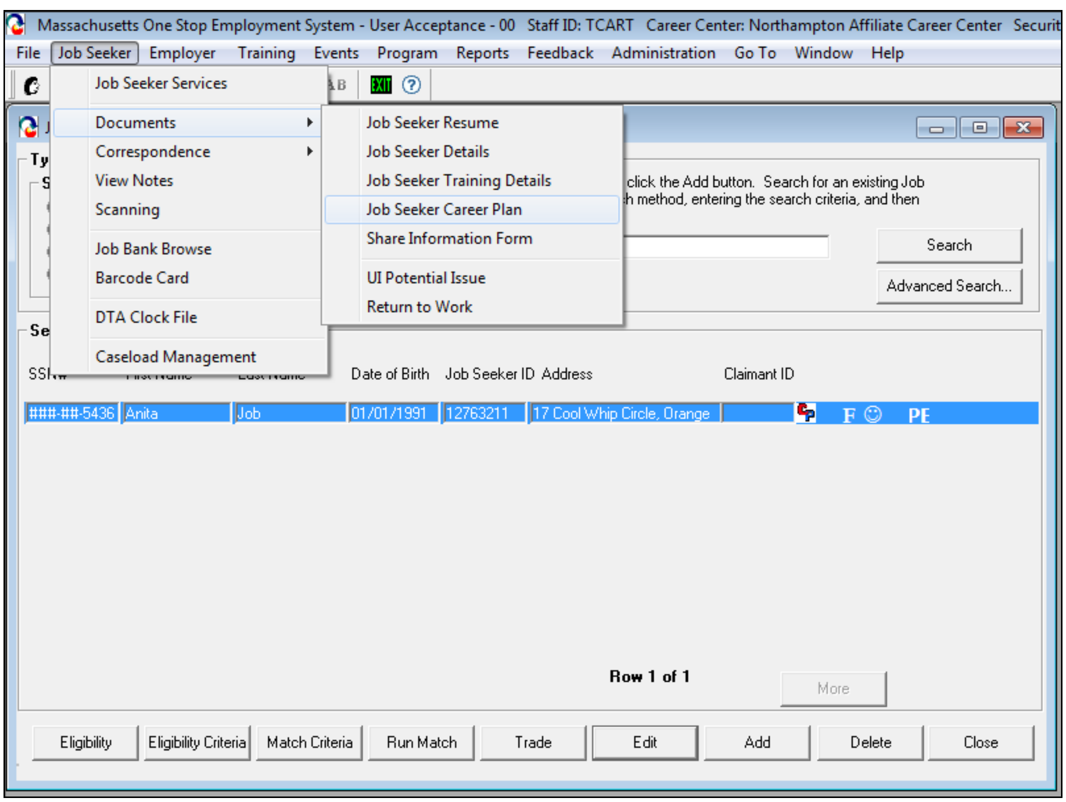
There is a way to view the entire career plan in Microsoft *Word*.
You must bring up a Job Seekers screen to do this.
This brings up a document that includes information recorded in MOSES, as well as places to add other information in Word.

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

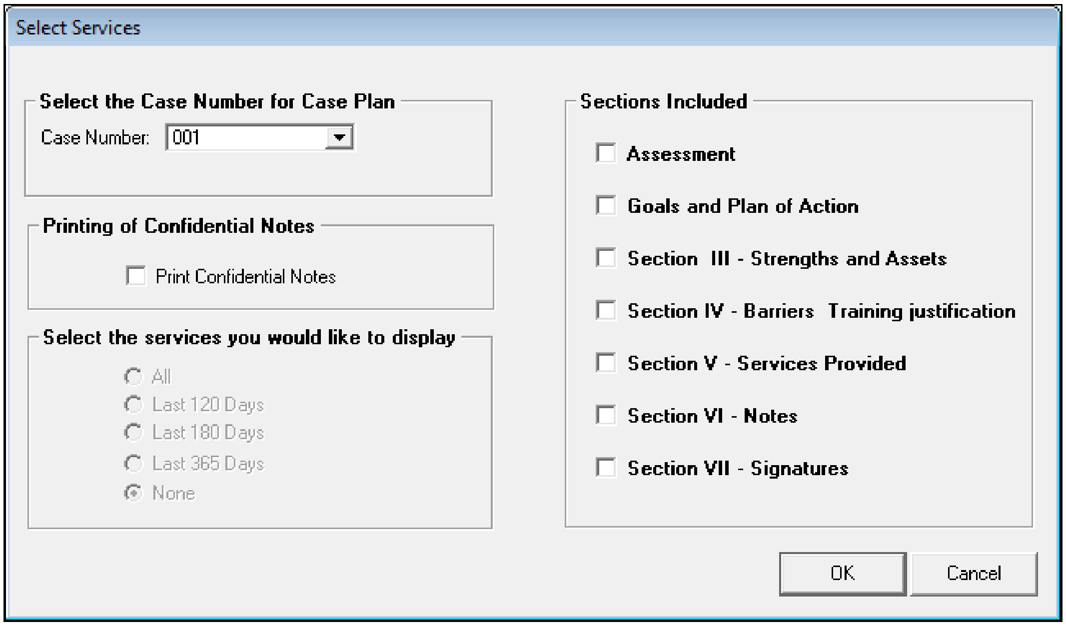
2. Highlight the Job Seeker whose career plan you want to view in **Word**.

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**.

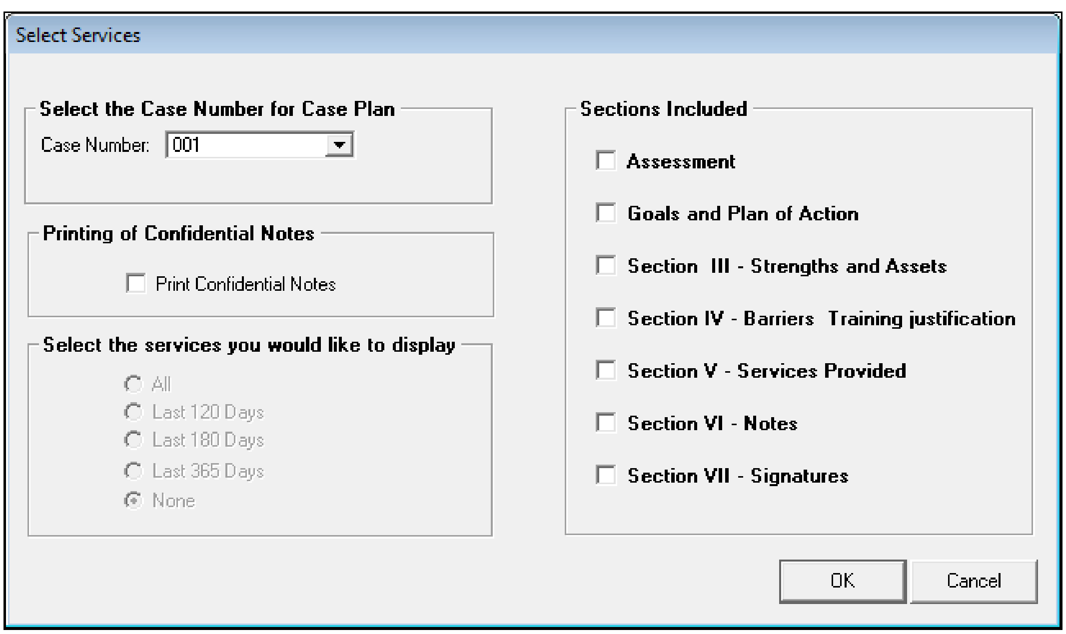


5. This brings up the **Select Services** screen.

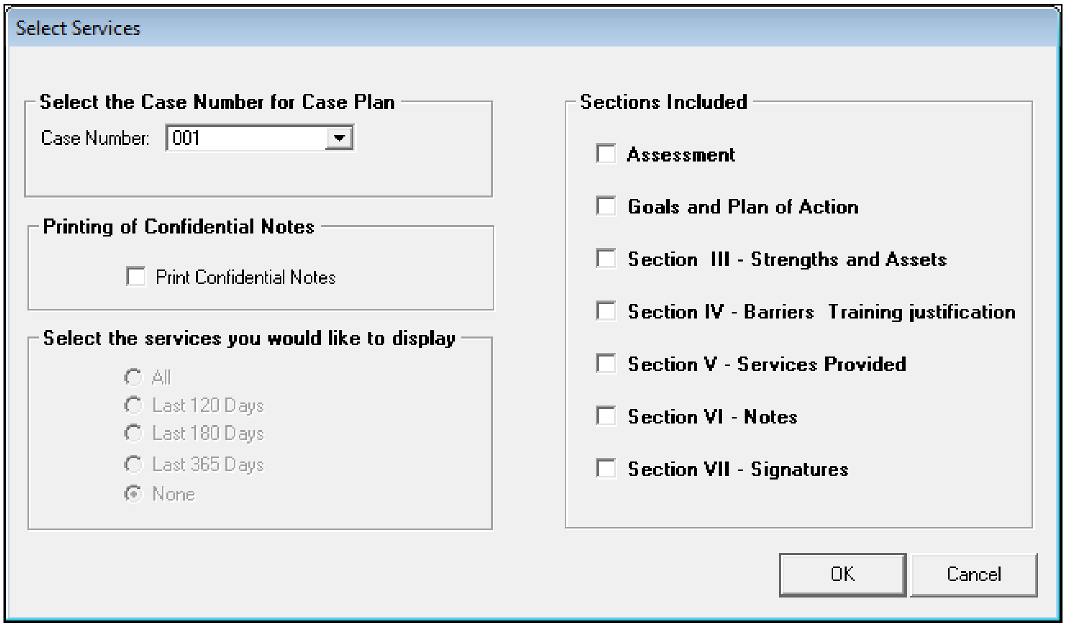


To view the career plan, one has to have already been created.
If no case plan number appears in the drop-down list, this customer has not been enrolled in Career Planning or assigned to a primary caseworker.

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.

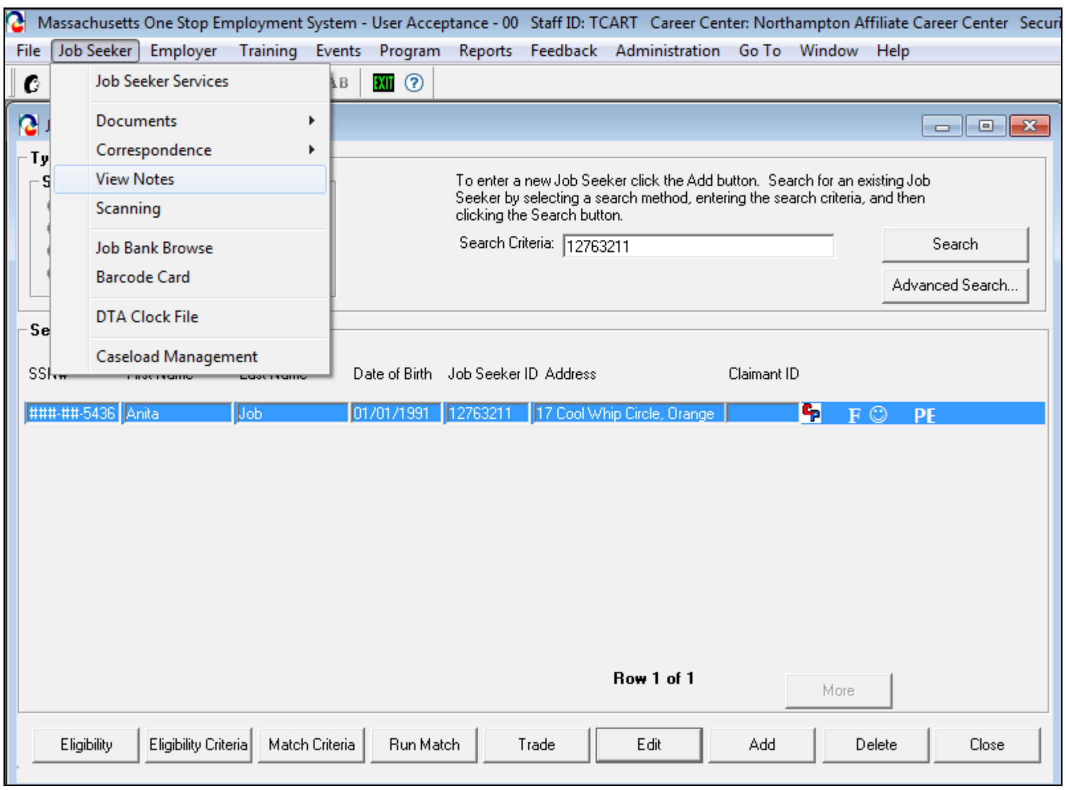
Other Ways to View Notes in Word

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.

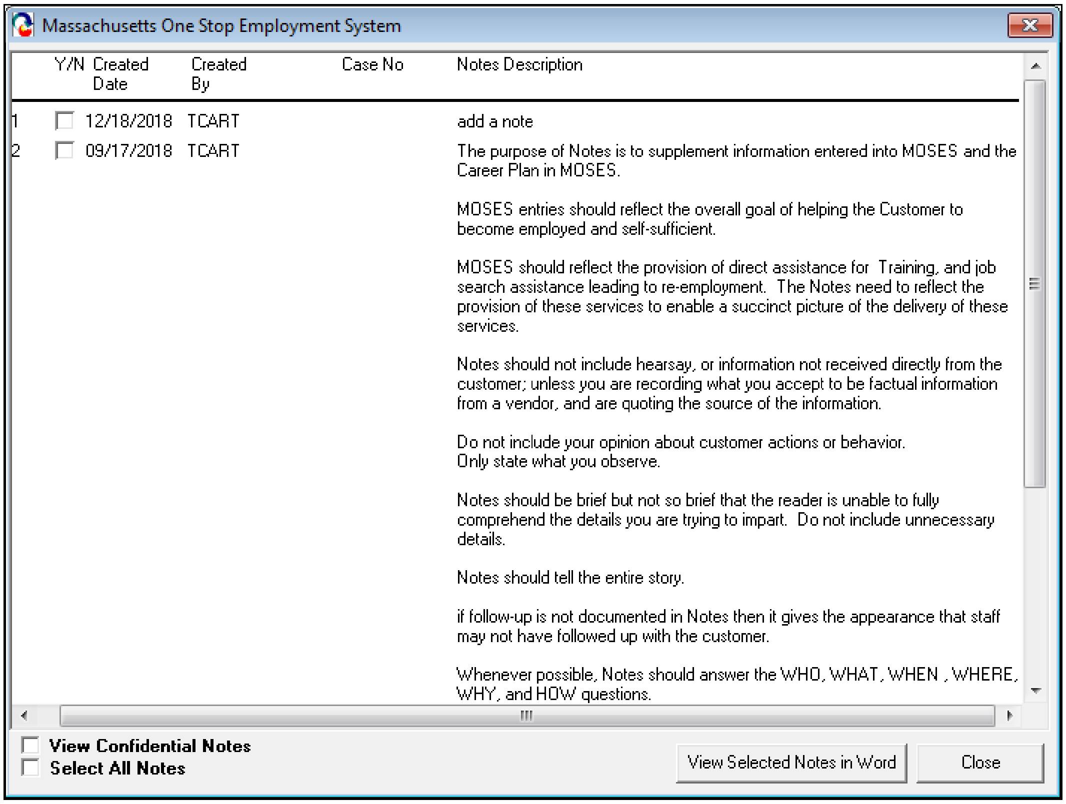
1. Carry out a Job Seeker search, either by clicking the **Job Seeker** icon or by clicking **Main Menu**, **Job Seeker**, **Job Seeker Services**.

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.

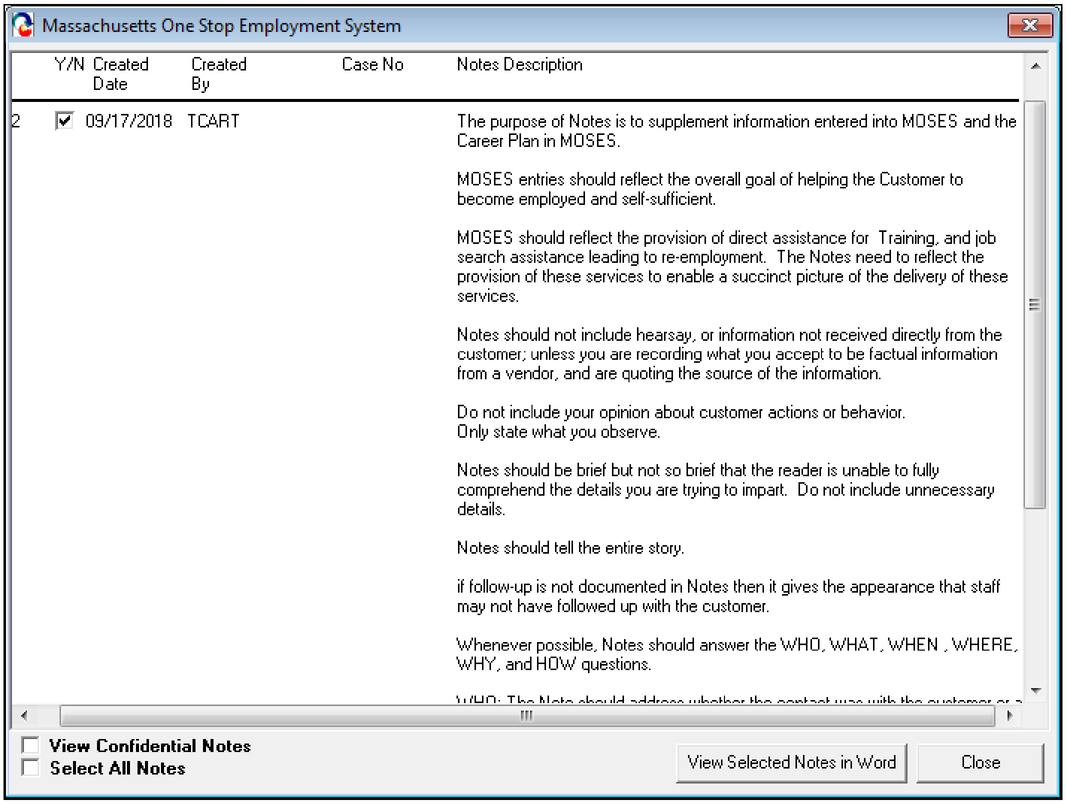


5. Click the **View Confidential Notes** check box to view all notes, whether or not they are confidential.
You must have clearance to view confidential notes of others to see confidential notes other staff entered.

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*.

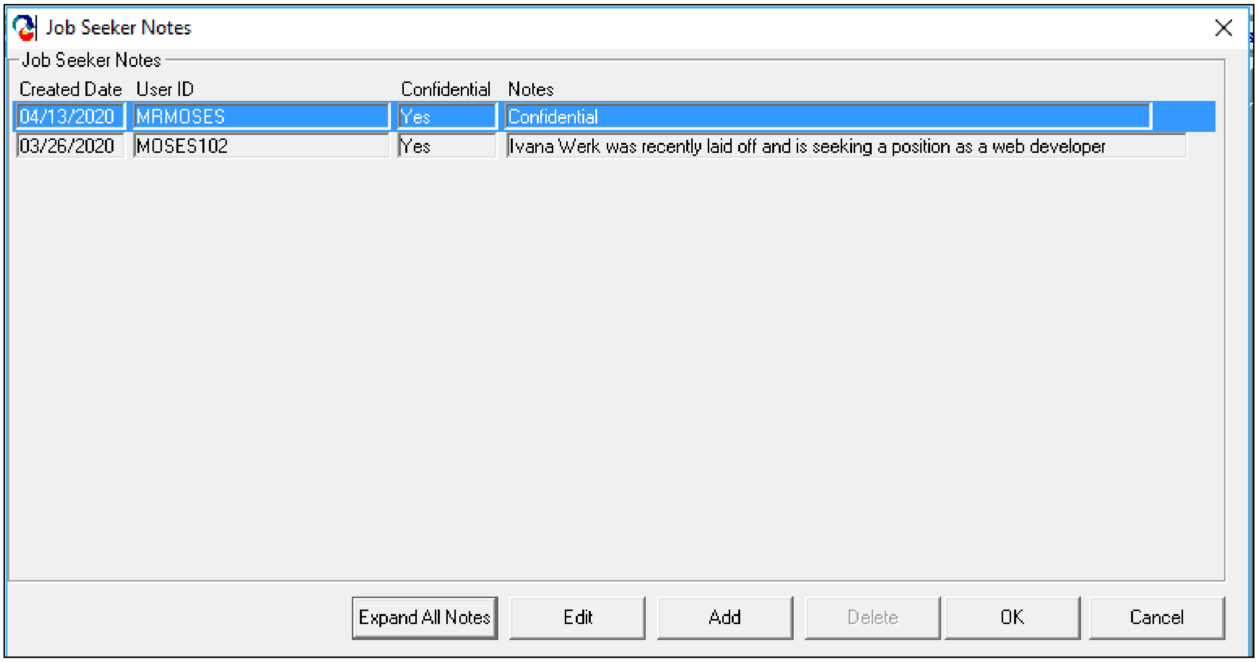


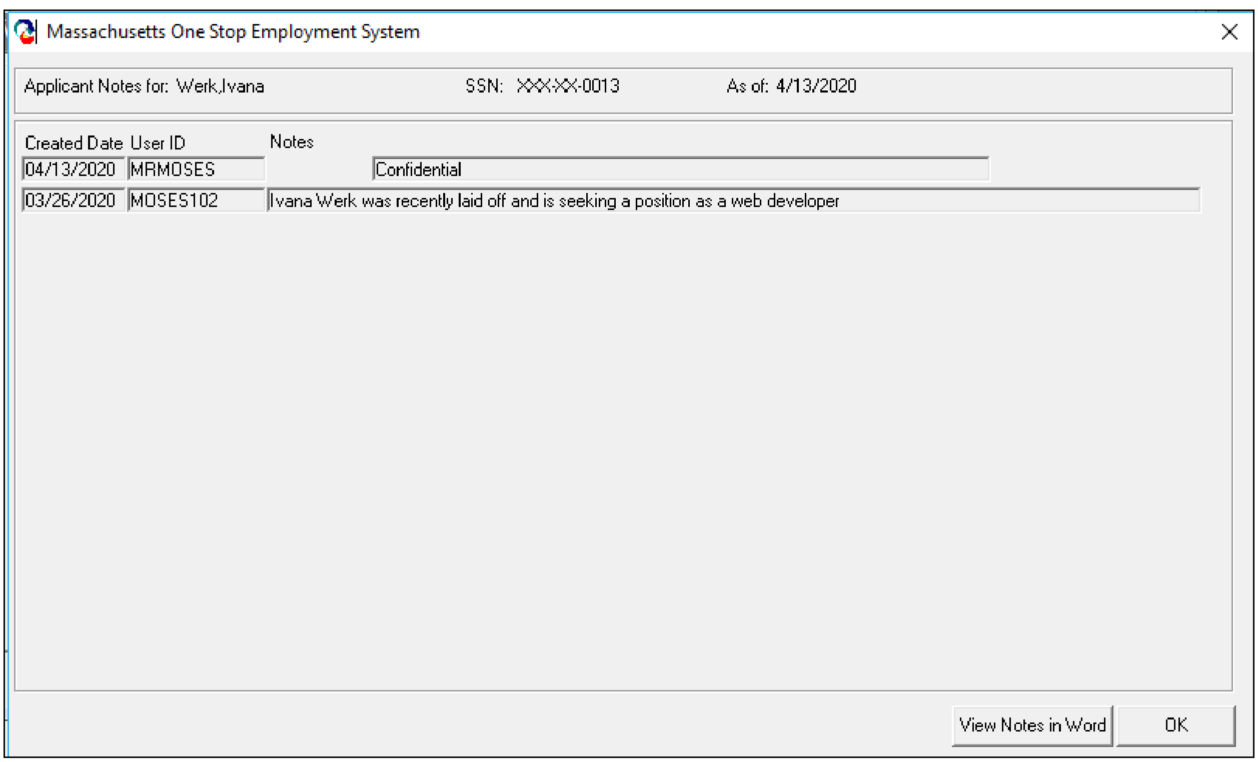
8. You may then edit and print out the **Notes** as a *Word* document.

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

MASSACHUSETTS WORKFORCE DEVELOPMENT SYSTEM

MassWorkforce Issuance

100 DCS 08.112 ☑ **Policy** ☐ **Information**

To:	Chief Elected Officials Workforce Development Board Chairs Workforce Development Board Directors Title I Administrators Career Center Directors Title I Fiscal Officers DCS Operations Managers
cc:	WIOA State Partners
From:	Alice Sweeney, Director Department of Career Services
Date:	February 23, 2018
Subject:	**Career Planning for Workforce Innovation and Opportunity Act (WIOA) Job Seeker Customers**

Purpose: The WIOA Career Planning for Job Seeker Customers policy is the replacement for the WIA Case Management policy (Issuance #04-34). The activity that was formerly referred to under WIA as Case Management is now called ***Career Planning*** under WIOA. The components of Career Planning are commensurate with the former fundamentals and principles of Case Management. This policy is to provide guidance and clarification to One-Stop Career Center (OSCC) managers and staff related to the uniform and consistent interpretation and application of the elements that constitute WIOA career planning for job seeker customers under a formal Individual Employment Plan (IEP) (formerly referenced as Case Management under WIA) and to ensure the integrity of reporting career planning activities and services through the Massachusetts One-Stop Employment System (MOSES).

Background: WIOA requires that One-Stop Career Centers provide services to individual customers based on individual needs, including the seamless delivery of multiple partner services to individual customers.

WIOA defines "Career Services" in three types: basic career services, individualized career services, and follow-up services.

Career Planning is the method of providing job seeker customers with a formal, structured plan of action designed specifically to identify an appropriate employment goal and to develop a schedule of activities and services that will empower the customer to overcome or mitigate barriers to attaining their goal(s).

Career Planning is considered to be an Individual Career Service. The term "career planning" means the implementation of a person-centered approach in the delivery of services. Case management (career planning service) is indeed a two-way contact – communication – via person-to-person, email back and forth on the same date or day, or a two-way telephone conversation of substance that results in a more direct, personalized, and real customer service that is value driven. The Career Planning delivery model is designed to prepare and coordinate comprehensive employment plans for participants to ensure access to appropriate workforce investment activities and supportive services, using, where feasible, computer based technologies and to provide the appropriate job, education, and career counseling during program participation and after job placement.

To ensure the accurate and consistent interpretation, data entry, and reporting of service elements provided to job seeker customers within the context of Career Planning, it is important that career center management and staff know which customer groups have been designated as eligible for Career Planning. They also need to be knowledgeable of specific Career Planning functions and the service elements and actions that fall within those functions, and to know the correct method for recording those service elements and actions in MOSES.

Policy: Formal Career Planning will be the standard service delivery model for job seeker customers.

Each customer receiving career planning services will also have a formal Individual Employment Plan (IEP).

It is highly recommended that all customers with significant barriers to employment who require individual services receive career planning services.

An Individual Employment Plan (IEP) is an individualized career service consisting of connected activities, jointly developed by the participant and career center staff. The plan includes an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the job-seeking customer to attain these goals and objectives. The Individual Employment Plan (IEP) is an effective tool to serve individuals with barriers to employment and to coordinate the various services including training services they may need to overcome these barriers.

Career Planning as defined by WIOA is a customer-centered, goal-oriented process in which an individual staff person, or a team of career center staff, assists a job seeker customer with the development and coordinated delivery of a structured program of planned, interconnected services in order to achieve a specific employment goal. The career planning model implies a partnership between the One-Stop Career Center staff and the customer. The partnership involves distinct responsibilities aimed at linking the customer to appropriate career center services and ultimately, moving the customer to suitable employment. Systematic and timely data entry of all career planning activities ensures program continuity for each customer.

In order for career planning to be effective, the designated OSCC counselor must be fully responsible for monitoring the customer's progress throughout the entire service plan schedule, not only for those elements of the plan provided directly by the OSCC counselor, but also for services provided by other career center staff or staff of other service organizations.

Additionally, as a standard best practice, counselors should contact the customer within 30 days, but must contact them within 60 days, unless program requirements or contractual agreements stipulate shorter durations, such as the Veterans under the JVSG Program, to ensure timely identification and resolution of any issues that could either significantly impede or negate participation in, or successful completion of, any planned service activity (particularly in relation to key services such as assessment, counseling, training, job development, job referral, etc.) or jeopardize the overall attainment of the customer's employment goal. Regular contact with other direct service providers is also an important step in assessing progress and assuring the customer's overall success. Contact is defined as providing a recognized MOSES service and a detailed Note of said service in the Job Seeker record.

Career center managers and staff must note that career planning can occur across geographic career center service areas. Given that customer choice is a cornerstone of the service delivery model under WIOA it is conceivable, and in some geographic areas, likely that the development of a formal Individual Employment Plan (IEP) will involve the provision of services through more than one career center location. In such cases, the designated One-Stop Career Center (OSCC) counselor must maintain the overarching responsibility of assisting the customer with the development of an IEP with the optimal mix of services which will help the job seeker reach his/her employment goal(s) regardless of the career center location. The designated OSCC counselor must coordinate service delivery, conduct follow-up, and ensure that all necessary data and information is entered in MOSES in a timely manner, notwithstanding what individual, entity or career center is the actual service provider. For the benefit of the customer, communication among staff providing services through different Career Centers is essential.

If a OSCC staff person is working with a customer who is being managed through a different career center location, the staff person should ensure that services being provided are consistent with the customer's IEP and that the designated

OSCC counselor is informed of the customer's intent and/or actions. All services must be data entered in MOSES on a timely basis.

Consistent with established procedures, the OSCC staff person must also seek and obtain the appropriate MOSES / database access to make any modifications to the customer's IEP.

In some instances, a customer may choose to change career centers locations entirely. It will be the responsibility of the Career Center Director to ensure that the designated OSCC counselor formally transfers the individual's IEP to the new career center location and to a newly designated OSCC counselor. The transfer should be accomplished according to established protocols and practices.

The MOSES Career Planning component will record and report services and activities developed and undertaken under the auspices of an IEP and within the context of a career planning service model.

The MOSES Career Planning module supports all career planning functions from an individual's initial assessment and program eligibility determination through service delivery documentation, follow-up, and case closure. The tool also provides a "tickler" system to aid the designated counselor in monitoring the customer's progress in carrying out their IEP and in conducting timely follow-up activities. MOSES Career Planning also provides a framework to effectively record, manage, and track all aspects of each OSCC staff person's caseload.

Attachment A is a chart outlining the basic career planning functions: Assessment, Goal Setting, Strategy/Plan Development, Service Delivery Coordination, Follow-Up, and Case Closure. The chart provides general guidance regarding the documentation requirements related to recording career planning activities and information for each of the basic functions using the MOSES Career Planning Tool. The chart should be used as a desk aid.

Action Required: The above elements related to the provision of career services by required career center partners must be incorporated into career center operations by Local Workforce Development Boards and One-Stop Career Center Operators.

Effective: Immediately

Attachment: Career Planning Reference Tool

Inquiries: Please email all questions to PolicyQA@MassMail.State.MA.US. Also, indicate issuance number and description.

References: WIOA Section 3(8)(A)&(B)

Attachment A

Career Planning Reference Tool

CAREER PLANNING

The process undertaken by an individual customer and Career Center Staff to create an agreed upon Individual Employment Plan (IEP) including a specific mix of Career Center services and resources necessary to attain the customer's employment goal.

ASSESSMENT: The identification and analysis of the strengths and possible challenges in relation to the individual's education, work history, skills, knowledge, interests, abilities, labor market, aptitude, testing scores and any barriers to employment.

BASIC CAREER SERVICES:
WIOA basic career services represent "front end" basic services to job seekers. Basic career services are self-service and/or informational.

Services and activities include the following:

- Outreach, intake (including worker profiling), and orientation to information and other services available through the local workforce system;
- Initial assessment of skill levels, including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and support service needs;
- Labor exchange services, including:
  - Job search and placement assistance, and when needed by an individual, career counseling, including the provisions of information on nontraditional employment and in-demand industry sectors and occupations ; and
  - Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services not traditionally offered

INDIVIDUALIZED CAREER SERVICES:
Individualized career services assist WIOA eligible participants through the exploration of careers, training programs, and employment opportunities.

These services may include:

- Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers;
- Development of a Career Action Plan to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve his or her employment goals, including the list of, and information regarding eligible training providers;
- Group counseling;
- Individual counseling;
- Career planning;
- Short-term prevocational services, including development of learning skills, communication services, interviewing skills, punctuality, personal maintenance skills, and professional conduct services to prepare individuals for unsubsidized employment or training ;
- Internships and work experience that are linked to careers ;
- Workforce preparation activities that help an individual acquire a

FOLLOW UP SERVICES:
Follow-up services must be provided, as appropriate, for participants who are placed in unsubsidized employment for up to 12 months after the first day of employment.

Follow-up services could include, but are not limited to:

- Additional career planning and counseling
- Contact with the participant's employer, including assistance with work-related issues that may arise
- Peer support groups
- Information about additional educational opportunities, and referral to supportive services available in the community
- Case management administrative follow-up
- Other services

Follow-up services do not extend the date of exit in performance reporting.

Career Planning Reference Tool

through the local workforce system; • Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs; • Provision of referrals to and coordination of activities with other programs and services, including programs and services within the local workforce system and when appropriate, other workforce development programs (eg. Partner Services including but not limited to SNAP, TANF, HUD, Mass Health Connector, etc.); • Provision of workforce and labor market employment statistics information, including information relating to local, regional, and national labor market areas: ➢ Job vacancy listings in labor market areas; ➢ Information on job skills necessary to obtain the vacant jobs listed; and ➢ Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs; • Provisions of performance information and program cost information on eligible providers of training services by program and provider type; • Provision of information about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;	combination of basic academic skills, critical thinking skills, digital literacy skills, and self-management skills, including competencies in utilizing resources, using information, working with others, understanding systems, and obtaining skills necessary for successful transition into and completion of postsecondary education, training, or employment; • Financial literacy services; • Out-of-area job search and relocation assistance; and • English language acquisition and integrated education and training programs.	

2

Attachment A

Career Planning Reference Tool

• Provision of information, in usable and understandable formats and languages, relating to the availability of support services or assistance, and appropriate referrals to those services and assistance; • Provision of information and assistance regarding filing claims for unemployment compensation • Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA.		
There is no longer a required sequence of services		

Attachment A

Career Planning Reference Tool

Element	Required Documentation Elements	Related MOSES Elements	Additional Staff Guidance
Basic	Complete the Basic tab	Populate or update customer's basic information	Ensure staff let customer know to keep contact info updated in both Job Quest and UIO.
Full	• In school • Highest Degree • Career Objective	Populate or update the full TAB	Staff should complete as much data as they can gather including, basic info, disclosure of a disability, Language, identification as long-term unemployed, family size, migrant status if disclosed/identified. The more complete the record is the better identification of resources that may be available to the person.
Educational Background	Detailed summary of education history and attainment to include: • Degrees and diplomas • Industry-recognized Licenses/Certifications and issue and expiration dates • Continuing Education courses (not necessarily industry-recognized) • Specialized training or other credentials • If other or none explain	Populate or update education history collected and update Education TAB	During the course of providing career planning services the customer may achieve additional education or training. If so the Education Tab must be revised to document the achievement. In addition, on the General Services tab post an Outcome/Enhancement. A copy of appropriate documentation must be acquired for any industry recognized credential obtained through training.
Work History	List relevant employment and include the following: • Name (do employer search) • Occupational Code • Job Title • Start/End date • Main Duties • Salary and Benefits • Reason for Leaving Prior Job(s) • NAICS	Populate or update (edit) the customer's work history on the MOSES Work Experience tab. If the employer is already visible on the screen EDIT the information to update.	Best Practice: Include a minimum of five years (if available)

4

Attachment A

Career Planning Reference Tool

Element	Required Documentation Elements	Related MOSES Elements	Additional Staff Guidance
Skills and Abilities Testing: • Basic Skills • Occupational Skill/Abilities • Aptitudes • Career Interest Inventory	Testing tab in MOSES: Test results are placed in customers file Document completed assessments on the General Services tab	Assessments/Testing: • Instrument name and version • Date administered • Score/Results • Analysis (if applicable) If an assessment is not completed, explain and document why	Testing of basic skills is strongly recommended for customers. Reading and Math scores must be recorded for all customers (e.g. TABE) being considered for education/training. Individuals with post-secondary education may be exempted from testing.
Identify Barriers to Education/Employment • Labor market for Current Skills • Job Search Skills • Other barriers including, but not limited to: transportation, housing, language skills, child care, etc.	Documentation of any impediments to successful participation in job search, training and sustained employment • Barrier Name • Brief Description • Plan to address the Barrier	Check the appropriate barrier boxes on the Barriers TAB. Enter the specific barrier name, brief description, and plan to address the barrier in the Barrier Notes field.	The barriers TAB should be used to accurately record identified barriers and plans to address them. Do not delete a barrier once it has initially been recorded. If a customer eventually overcomes a specific barrier, record how it was done, date recorded and the staff member's initials.
Labor Market Information	• Document why the customer can or cannot find suitable employment with his or her (current) skills in the current labor market • If applicable, explain and justify why the customer will be likely to find suitable employment with newly acquired skills • Substantiate the information with cited reliable sources	Document labor market conditions for both the prior job and future employment goal. Record information on the Career Plan (currently known as the Case Plan tab in MOSES); Assessment sub-tab.	Labor market information is required for all customers receiving career planning services, including those not changing occupations or receiving training as current market conditions could impact their job search.
ELIGIBILITY FOR INDIVIDUALIZED SERVICES CAN NOW BE DETERMINED FOR NEXT STEPS			

5

Attachment A

Career Planning Reference Tool

GOAL SETTING:
The process undertaken by (both) a customer and designated career center staff person to identify and mutually agree upon the customer's desired education/employment goals and the necessary intermediate goals to achieve the desired outcome.

Element	Required Documentation Elements	Required MOSES Elements	Additional Staff Guidance
Review Results of the comprehensive assessment with customer	Review: • Labor Market Information • Wage Range desired • Skill match (e.g. TORQ)	If any additional assessment tools are completed, document their completion under General Services	Best Practice: Tasks should correspond to goals
Identify and Discuss education/employment related goals		• Description OF SHORT AND LONG TERM GOALS to achieve desired outcome • Clarifying and supporting NOTES should support goals • Record on Career Plan tab (currently known as the Case Plan tab)	Staff must discuss with the customer if the goals are realistic and achievable
Set Goals	Goal Statement	The employment goal statement must be entered into the Goal Narrative on the Goals sub-tab	Record Goals that both the customer and career center staff agree are realistic and attainable The employment goal narrative should be consistent with the customer's career objective in Job Quest Advise customer regarding consistency in career objective as customer can update.

6

Attachment A

Career Planning Reference Tool

ON-GOING CAREER PLANNING:

The regular, periodic contact with the customer and/or Career Center staff and program partners to review and determine progress toward the individual's employment goal, or to review and determine the customer's status with regard to a specific element of the employment plan.

Element	Required Documentation Elements	Required MOSES Elements	Additional Staff Guidance

On-going career planning may:
• Ascertain a customer's progress on the agreed upon Individual Employment Plan and update as necessary
• Identify new or additional barriers or personal issues to be resolved
• Evaluate a customer's participation in planned service components
• Document a customer's entry into employment
  ◦ Identify that a customer's status changed.
  ◦ Revise and adjust services as necessary
  ◦ Case conference with partners when necessary
	Record in a timely manner all status and/or outcome data provided by the customer or program and/or partner staff.
	
	WIOA customers must receive Career Planning Services at a minimum of <u>at least</u> every 60 days*.
	
	*Veterans must receive Career Planning services <u>at least</u> every 30 days
		Services must be entered on the correct service tab with a corresponding MOSES note
		
		Ensure all related components are updated accordingly to reflect the provision of services
		
		If note is not entered on the actual day of service include the actual date of service in the note
			Use MOSES notes for documentation. When prompted for a service, record the appropriate service.
			All services must be accompanied by a MOSES notes entry.
			
			Local policy required for loss of contact

Attachment A

Career Planning Reference Tool

FOLLOW UP:
Follow-up services must be provided, as appropriate, including counseling regarding the workplace for participants in adult or dislocated worker workforce investment activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment.
While follow-up services must be made available, not all of the adults and dislocated workers who are registered and placed into unsubsidized employment will need or want such services.

If a customer declines follow up services, it must be recorded in MOSES and explained why in the accompanying NOTE.

Element	Required Documentation Elements	Required MOSES Elements	Additional Staff Guidance
Follow-up services could include, but are not limited to: • Additional career planning and counseling • Contact with the participant's employer, including assistance with work-related problems that may arise • Peer support groups • Information about additional educational opportunities, and referral to supportive services available in the community • Case management administrative follow-up • Other services		Document "after exit follow-up" service (not blue bold)	All services received must have an accompanying MOSES note to support. If there is a gap in services, explain in notes why this has occurred.

Attachment A

Career Planning Reference Tool

CASE CLOSURE:

The formal cessation of active service delivery and follow-up conducted in conjunction with the agreed upon elements and terms included in the customer's formal Individual Employment Plan.

Element	Required Documentation Elements	Required MOSES Elements	Additional Staff Guidance
Formal Case Closure may occur: • After the required follow-up period and verification that a customer has achieved his/her employment goal as described in the Individual Employment Plan. • After verification from a customer that he or she has decided to no longer participate in the program of services described in the Employment Plan. • After the 90 day period following the case manager's last contact with a customer who has ceased to participate in the planned services as described in the Individual Employment Plan and who has not achieved his or her stated employment goal. • Other, unanticipated circumstances may also warrant formal case closure		Update all goals so no goals are in the Pending status on the Career Plan, Goals sub-tab.	Record proper job entry category information (obtained employment, found employment) on the Services, Employment sub-tab. NOTE: For *entered employments,* MOSES will automatically record the appropriate outcome/enhancement service. Closure after a 90 day no contact period must be done in accordance with local policy regarding lack of contact.

9

MASSACHUSETTS WORKFORCE DEVELOPMENT SYSTEM

MassWorkforce Issuance

100 DCS 08.102 ☑ Policy ☐ Information

To: Chief Elected Officials
Workforce Board Chairs
Workforce Board Directors
Title I Administrators
Career Center Directors
Title I Fiscal Officers
DCS Operations Managers

cc: WIOA State Partners

From: Alice Sweeney, Director
Department of Career Services

Date: May 5, 2016

Subject: **WIOA Title I Follow up Services**

Purpose: To notify Local Workforce Boards, One-Stop Career Center Operators and other local workforce partners of the definition of 'Follow up Services' under the Workforce Innovation and Opportunity Act.

Background: The Workforce Innovation and Opportunity Act (WIOA) replaces the WIA Title I core, intensive and training services with WIOA Career Services. Career services fall into three categories: Basic Services, Individual Services, and Follow-up Services.

While follow-up services must be provided, not all of the adults and dislocated workers who are registered and placed into unsubsidized employment will need or want such services. Also, the intensity of appropriate follow-up services may vary among participants. Participants who have multiple employment barriers and limited work histories may be in need of significant follow-up services to ensure long-term success in the labor market. Other participants may identify an area of weakness in the training provided by the WIOA prior to placement that will affect their ability to progress further in their occupation or to retain their employment.

Follow-up services could include, but are not limited to:

- Additional career planning and counseling
- Contact with the participant's employer, including assistance with work-related problems that may arise
- Peer support groups
- Information about additional educational opportunities, and referral to supportive services available in the community
- Case management administrative follow-up
- Other services

Follow up services are defined as appropriate if they are suitable to the customers' needs regarding content, service method, frequency and are in accordance with the agreed to individual employment plan (IEP).

Policy: Follow-up services must be provided, as appropriate, including counseling regarding the workplace, for participants in adult or dislocated worker workforce investment activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment. If a customer declines follow up services this must be recorded in the customer's case file. Follow up services for the purposes of career planning are not to be construed as the follow up services required for performance reporting.

Action Required: Local Workforce Boards will adhere to the policy delineated in this issuance in developing its WIOA Follow Up Services and Standard Operating Procedures (SOP). Each local Board will also ensure that all career center staff are informed of the content of this issuance.

Standard Operating Procedures will be reviewed by the DCS Field Management and Oversight Unit during the FY2016 Program monitoring.

Effective: Immediately

Inquiries: Please email all questions to PolicyQA@detma.org. Also, indicate Issuance number and description.

References: WIOA 134(c) (2) (A) (xiii), NPRM 678.430 (c)

***NOTE**: the Barrier names were updated and modified in 2017 / 2018 for WIOA, so slight changes may be noted in MOSES.*

MASSACHUSETTS WORKFORCE DEVELOPMENT SYSTEM

MassWorkforce Issuance

Workforce Issuance No. 07- 77 **Policy** **☑ Information**

To: Chief Elected Officials
Workforce Investment Board Chairs
Workforce Investment Board Directors
Title I Administrators
Career Center Directors
Title I Fiscal Officers
DCS Associate Directors
DCS Field Managers

cc: WIA State Partners

From: David W. Mackley, Director
Department of Workforce Development

Date: December 3, 2007

Subject: **Procedures for Using the Barriers Tab in MOSES**

Purpose: To provide Local Workforce Investment Boards, One-Stop Career Center Operators and other local workforce investment partners with information on use of the Barriers tab in MOSES.

Background: MOSES Build 24, released in June 2007, introduced a change in the way we capture and record information on Barriers faced by customers. Please refer to Mass Workforce Issuance No.07-38, Changes in MOSES Version 24.0 (6/19/07) for specific details on the screen changes.

The Barriers were moved from the Job Seeker Eligibility Criteria Tab and from the Case Plan to a Barriers Tab on the Job Seeker Full Tab so that barriers to employment and notes are located in only one place. Please note that some barriers may be used for determination of WIA Eligibility for some populations and that the same fields may identify barriers that are not determiners of WIA Eligibility for other populations. In either case, you should check off the applicable barriers. Those fields whose completion indicates either an Eligibility or Non-Eligibility Barrier are described below.

In order to complete Eligibility Barriers; please refer to WIA Communication No. 05-74; Title I Eligibility Requirements (Revised) (9/29/05). The following information contains examples of acceptable documentation for specific Eligibility Barriers. Please note that the single example for each Eligibility Barrier is not meant to be the only acceptable documentation.

ELIGIBILITY BARRIERS

The criteria used to make a determination of eligibility and/or to verify eligibility must be provided and the location of this information must be clearly identified in Barrier Notes. Examples are provided below.

Eligibility barriers also may be used to identify barriers for customers in cases where eligibility determination is not required. An explanation must be provided in Barrier Notes, although verification is not required.

BELOW GRADE LEVEL

The **Below Grade Level** Barrier is one of the Barriers that contribute to the Eligibility Barrier of **BASIC SKILLS DEFICIENT**. If the **Below Grade Level** Eligibility Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**Below Grade Level**) must be listed and what criteria were used to make this determination and where this information is located must be included. Also, please put the date the note was created and the initials of the individual who entered the note.

As per WIA Issuance 05-74, **Below Grade Level** can be assessed using a Generally Accepted Standardized Test. If this determination is made based upon test scores, these scores will already have been entered into MOSES. The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

LIMITED ENGLISH PROFICIENCY

The **Limited English Proficiency** Barrier is one of the Barriers that contribute to the Eligibility Barrier of **BASIC SKILLS DEFICIENT**. If the **Limited English Proficiency** Eligibility Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**Limited English Proficiency**) 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. If the determination is made based upon test scores, these scores will already have been entered into MOSES. The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

Limited English Proficiency: See Test Scores in MOSES. MB 11/19/07

The **Limited English Proficiency** Barrier can also be utilized for WIA Adult, Dislocated Worker, and Non-WIA customers as well. However, in these instances the **Limited English Proficiency** Barrier is not a determiner of eligibility. If the **Limited English Proficiency** Barrier is checked off, an explanation must be included in the Barrier Notes. However, Non-Eligibility Barriers do not require verification.

DISABILITY

If the **Disability** Barrier is checked off for a WIA Youth Customer, this signifies that this Barrier is an Eligibility determiner. An explanation must be included on the Barrier Notes. First, the name of the barrier (**Disability**) 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. As per WIA Issuance 05-74, an Individual with Disabilities (Youth) can be documented using School Records. The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

Disability: See documentation in from School in Customer's Case File. MB 11/19/07

The **Disability** Barrier can also be utilized for WIA Adult, Dislocated Worker, and Non-WIA customers as well. However, in these instances the **Disability** Barrier is not a determiner of eligibility. If the **Disability** Barrier is checked off, an explanation must be included in the Barrier Notes. However, Non-Eligibility Barriers do not require verification.

An example of a Barrier Notes entry would be:

Disability: Customer completed Career Center Application stating she was Disabled. MB 11/19/07

DISPLACED HOMEMAKER

Displaced Homemaker: If the Below **Displaced Homemaker** Eligibility Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**Displaced Homemaker**) 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. As per WIA Issuance 05-74, **Displaced Homemaker** can be documented using a Divorce Decree. The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

Displaced Homemaker: See Divorce Decree in Customer's Case File. MB 11/19/07

FOSTER CHILD

Foster Child: If the **Foster Child** Eligibility Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**Foster Child**) 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. **Foster Child** can be documented by Telephone Verification using the Telephone Verification Form, as per WIA Issuance 05-74. The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

Foster Child: See Telephone Verification Form in Customer's Case File. MB 11/19/07

HOMELESS

Homeless: If the Homeless Barrier is checked off for a WIA Youth Customer, this signifies that this Barrier is an Eligibility determiner. If this Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**Homeless**) 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.

As per WIA Issuance 05-74, **Homeless** can be documented using a Written Statement from an Individual Providing Temporary Residence (Please refer to WIA Issuance 05-74: Attachment G; Alternative Forms of Documentation and Attachment and Attachment I; Applicant Statement Form). The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

Homeless: See Applicant Statement in Customer's Case File. MB 11/19/07

The **Homeless Barrier** can also be utilized for WIA Adult, Dislocated Worker, and Non-WIA customers as well. However, in these instances the **Homeless** Barrier is not a determiner of eligibility. If the **Homeless** Barrier is checked off, an explanation must be included in the Barrier Notes. However, Non-Eligibility Barriers do not require verification.

An example of a Barrier Notes entry would be:

Homeless: During the intake process the Customer informed the Case Manager that he was Homeless and lacked a permanent address. MB 11/19/07

OFFENDER

Offender: If the **Offender** Barrier is checked off for a WIA Youth Customer, this signifies that this Barrier is an Eligibility determiner. If this Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**Offender**) 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.

As per WIA Issuance 05-74, **Offender** can be documented using documentation from a cognizant agency. However, for youth we are not requiring the capturing of the Youth's actual offense, only that they are an **Offender**. The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

Offender: See Letter from DSS in Customer's Case File. MB 11/19/07

The **Offender** Barrier can also be utilized for WIA Adult, Dislocated Worker, and Non-WIA customers as well. However, in these instances the **Offender** Barrier is not a determiner of eligibility. If the **Offender** Barrier is checked off, an explanation must be included in the Barrier Notes. However, Non-Eligibility Barriers do not require verification. An example of this case would be the following:

An example of a Barrier Notes entry would be:

Offender: During the intake process the Customer informed the Case Manager that she was an Offender. MB 11/19/07

PREGNANT/PARENTING ISSUES

Pregnant/Parenting Issues: If the **Pregnant/Parenting Issues** Eligibility Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier **(Pregnant/Parenting Issues)** 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.

As per WIA Issuance 05-74, **Pregnant/Parenting** can be documented using a Statement from Social Services Agency (Department of Transitional Assistance). The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

Pregnant/Parenting Issues: See DTA documentation in Customer's Case File. MB 11/19/07

RUNAWAY YOUTH

Runaway Youth: If the **Runaway Youth** Eligibility Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**Runaway 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.

As per WIA Issuance 05-74, **Runaway Youth** can be documented using a Written Statement from an Individual from an Individual Providing Temporary Residence (Please refer to WIA Issuance 05-74: Attachment G; Alternative Forms of Documentation and Attachment and Attachment I; Applicant Statement Form). The note must describe what criteria was used to determine the eligibility and where this information can be located.

An example of a Barrier Notes entry would be:

Runaway Youth: See Applicant Statement in Customer's Case File. MB 11/19/07

YOUTH REQUIRING ADDITIONAL ASSISTANCE

Youth Requiring Additional Assistance: If the **Youth Requiring Additional Assistance** Eligibility Barrier is checked off, an explanation must be included on the Barrier Notes. First, the name of the barrier (**Youth Requiring Additional Assistance**) 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.

As per WIA Issuance 05-74, **Youth Requiring Additional Assistance** is a Local Workforce Investment Board (LWIB) Designated Category. The note must state the LWIB Designated Category and the documentation required to verify this category.

An example of a Barrier Notes entry would be:

Youth Requiring Additional Assistance: LWIB designated Minority Status Cape Verdean. See signed Youth Application in Customers Case File. MB 11/19/07

NON ELIGIBILITY BARRIERS REQUIRED FOR YOUTH

The following two Non-Eligibility Barriers apply only to Youth Customers. While they are Non-Eligibility Barriers, it is necessary to capture this information in MOSES.

DSS YOUTH

DSS 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.

An example of a Barrier Notes entry would be:

DSS Youth: See Telephone Verification Form in Customer's Case File (for documentation of Foster Child Eligibility Barrier). MB 11/19/07

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.

An example of a Barrier Notes entry would be:

DYS Youth: See Telephone Verification Form in Customer's Case File (for documentation of Foster Child Eligibility Barrier) MB 11/19/07

NON-ELIGIBILITY BARRIERS

The following is a list of all other Non-Eligibility Barriers:

- Financial
- Health
- Housing
- Labor Market Discrimination
- Lack of Childcare/Eldercare

- Lack of Credentials, Certification, Licensing
- Lack of Marketable/Occupation Skills
- Lack of Self Sufficiency
- Lack of Transportation
- Legal
- Limited Job Search Skills
- Other
- Probation Court Involvement
- Substance Abuse
- Underemployed
- Work History (Limited, Gaps, None, etc)

Please check off all applicable Barriers. If a Barrier is checked off, an explanation must be included in the Barrier Notes. Also, please enter the date the note was created and the initials of the individual who entered the note. Non-Eligibility Barriers do not require verification.

An example of a Barrier Notes entry would be:

Lack of Transportation: The customer informed the Case Manager during the assessment that she lacked her Drivers License. MB 11/19/07

Action Required: Please assure that all staff are informed of the contents of this issuance.

Inquiries: Questions about data entry for Barriers should be directed to Howard Frim at 617-626-5939 or hfrim@detma.org.

MASSACHUSETTS

Workforce Investment Act

WIA Communication No. 04-34 ☑ **Policy** ☐ **Information**

To: Chief Elected Officials
Workforce Investment Board Chairs
Workforce Investment Board Directors
Title I Administrators
Career Center Directors
Title I Fiscal Officers
DCS Regional Directors
DCS Area Directors

cc: WIA State Partners

From: Susan V. Lawler, Commissioner
Division of Career Services

Date: April 29, 2004

Subject: Case Management for Job Seeker Customers

Purpose: To provide policy guidance to Career Center managers and staff related to the uniform and consistent interpretation of the elements that constitute case management for job seeker customers under a formal Case Plan and to ensure the integrity of reporting Case Plan activities and services through the Massachusetts One Stop Employment System (MOSES) for individuals being case managed.

Background: The Workforce Investment Act provides for strengthened integration of workforce development services through a universally accessible One Stop delivery system. A general goal of the Workforce Investment Act is the personal empowerment of job seekers to take control of their own career development based on their ability to make an informed choice regarding the mix of services and the method of service delivery that best meets their individual needs. For those Career Center customers who are confident in the currency of their skills, choosing and accessing specific services can be a simple and somewhat straightforward process, much of which may be self-directed.

For others, however, the choices may not, initially, be all that clear. Many customers come to the Career Center unsure as to the viability of their skills and the prospects for finding similar work, or without an understanding of what the changing nature of the workforce means to them. They may have significant barriers that impede their ability to effectively reenter the workforce.

To these individuals, the advice, guidance and support available through the Career Center system provides the most effective foundation for them to more fully explore the service mix available to them. For some customers the planning and managing of their job search may seem to be a daunting task, and may require a more formal, structured and staff-assisted approach in order to identify and attain a realistic and suitable employment goal.

Case management is a method of providing job seeker customers with a formal, structured plan of action designed specifically to identify an appropriate occupational goal and to develop a schedule of services that will empower them to overcome or mitigate any barriers to attaining their goal.

Massachusetts' One Stop Career Centers have, since their inception, utilized the case management model as an efficient method of creating a framework for many of their customers to successfully find new employment. It has, in fact, been a common practice for Career Centers to target certain groups of workers for case management as the most effective way to provide needed services.

However, the 2003 - 2004 Quality Assurance reviews and on-going review of case management data elements in MOSES have clearly identified wide ranging and systematic inconsistencies in both the interpretation, recording and reporting of services provided to case managed job seeker customers of Massachusetts' One Stop Career Centers.

To assure the accurate and consistent interpretation, recording and reporting of service elements provided to job seekers within the context of the case management model, it is important that all Career Center management and appropriate staff are knowledgeable of specific case management functions, the service elements and actions that fall within those functions, the correct method of recording those service elements and actions in MOSES, and which customer groups have been designated for case management.

Policy: Formal case management will be the standard service delivery model for customers from these targeted groups.

- WIA Title I Enrollees
- Military Veterans and Other Qualified Eligible Persons (spouses of veterans who: died of a service connected disability; are MIA; are captured/POW; or a spouse of any person who has a total permanent service connected disability) who are assigned to the DVOP/LVER case manager
- Employment Assisted Service (EAS) Participants
- National Emergency Grant (NEG) Participants
- Trade Adjustment Assistance (TAA) Participants

Career Center staff may also identify individual customers who may benefit from case management. For each case managed customer, a Career Center staff person will be assigned to manage and coordinate the individual's formal service plan as the case manager.

Local Workforce Investment Boards may also identify additional customer groups for local case management. It is highly recommended that *all* customers who will require intensive services be case managed.

Case management is a customer-centered, goal-oriented process in which an individual staff person or a team of career center staff assists a customer with the development and coordinated delivery of a formal program of planned services in order to achieve a specific vocational goal. The case management model implies a partnership between the One Stop Career Center staff and the customer. However, the partnership involves distinct responsibilities aimed at linking the customer to appropriate career center services and ultimately, moving the customer to suitable employment. Systematic and timely records of all case management activities assure program continuity for each customer.

Effective case management consists of a structured set of clearly interconnected functions that a designated One Stop Career Center case manager undertakes to develop and coordinate the delivery of an individual customer's agreed upon plan of workforce development services.

For case management to be truly effective the designated case manager must be fully responsible for monitoring the customer's progress throughout the entire service plan schedule, not only for those elements of the plan provided directly by the case manager, but also for services provided by other Career Center staff or staff of other service organizations. Additionally, as a standard practice, the case manager should contact the customer at intervals of no longer than 60 days, unless program requirements or contractual agreements stipulate shorter durations, to assure timely identification and resolution of any issues that could either significantly impede or negate participation in, or successful completion of, any planned service activity (particularly in relation to key services such as assessment, counseling, training, job development, job referral , etc.) or jeopardize the overall attainment of the customer's employment goal. Regular contact with other direct service providers is also an important step in assessing progress and assuring the customer's overall success.

Career Center Managers and staff must note that case management can occur across career center service areas. With customer choice a cornerstone of the service delivery model under the Workforce Investment Act it is conceivable and, in some geographic areas, likely that the development of a formal Case Plan may involve the provision of specific services through more than one Career Center. In such cases, the designated case manager must maintain the overall responsibility of assisting the customer to develop a Case Plan that provides the optimal mix of services to reach his/her employment goal. The case manager

must also coordinate service delivery, conduct follow-up and ensure that all necessary data and information is entered in MOSES in a timely manner, notwithstanding what individual or entity is the actual service provider. For the benefit of the customer, communication with staff providing services through a different Career Center is essential to effective case management.

It must also be remembered that if a staff person is working with a customer who is being case managed through a different Career Center, the staff person should ensure that services are consistent with the Case Plan and that the designated case manager is informed of the customer's intent and/or actions. All services must be recorded in MOSES on a timely basis. Consistent with established procedures, the staff person must also seek and obtain the appropriate security clearance to make any modifications to the customer's Case Plan.

In other instances, a customer may choose to change Career Centers, altogether. Should such a circumstance arise, it will be the responsibility of the Career Center Director to assure that the case manager formally transfers the individual's case to the new Career Center and to a newly designated case manager. Again, the transfer should be accomplished according to established procedures.

The MOSES Case Management Tool has been specifically developed to record and report services and activities developed and undertaken under the auspices of a formal Case Plan and within the context of a case management service model.

The MOSES Case Management Tool supports all case management functions from an individual's initial assessment and program eligibility determination through service delivery documentation, follow-up and case closure. The tool also provides a "tickler" system to aid the case manager in monitoring the customer's progress in carrying out his/her Case Plan service schedule, and in conducting timely follow-up activities. The MOSES Case Management Tool also provides a framework to effectively record, manage and track all aspects of each Career Center staff person's (case manager's) caseload.

Attached is a chart outlining the basic case management functions: Assessment, Goal setting, Strategy/Case Plan Development, Service Delivery Coordination, Follow-Up and Case Closure. The chart provides general guidance regarding the documentation requirements related to recording case management activities and information for each of the basic functions using the MOSES Case Management tool. The chart should be used as a desk aid.

Effective: Immediately. Please assure that all appropriate Career Center management and direct service staff are apprised of the content of this issuance.

References: The Workforce Investment Act of 1978, §134(c) & (d); Title 38, Part III, Chapter 41, §4101; WIA Communication No. 01-34; WIA Communication No. 03-14.

Inquiries: Inquiries may be directed to Alice Sweeney, Director, Career Services Central Operations at (617) 626-6449 or asweeney@detma.org.

Filing: Please file this in your notebook of previously issued WIA Communication Series Issuances as #04-34.

See updated desk guide in Issuance 08.112

DEPARTMENT OF CAREER SERVICES

Workforce Issuance

100 DCS 18.109 ☑ **Policy** ☐ **Information**

To: Chief Elected Officials
MassHire Workforce Board Chairs
MassHire Workforce Board Directors
Title I Administrators
MassHire Career Center Directors
Title I Fiscal Officers
MDCS Operations Managers

cc: WIOA State Partners

From: Alice Sweeney, Director
MassHire Department of Career Services

Date: July 30, 2019

Subject: **Selective Service Compliance Verification and Related Data Entry in MOSES**

Purpose: To provide new guidance to MassHire Workforce Boards, MassHire Career Center Operators and other workforce partners related to verifying Selective Service compliance for all MassHire customers seeking enrollment into WIOA Title I services and related data entry requirements in MOSES.

Background: All individuals designated male at birth born on or after January 1, 1960 must present documentation of compliance with Selective Service registration requirements prior to enrollment in WIOA Title I services. This includes individuals designated male at birth that have had sex reassignment surgery. Individuals designated male at birth are required to register with the Selective Service registration within 30 days of their 18th birthday.

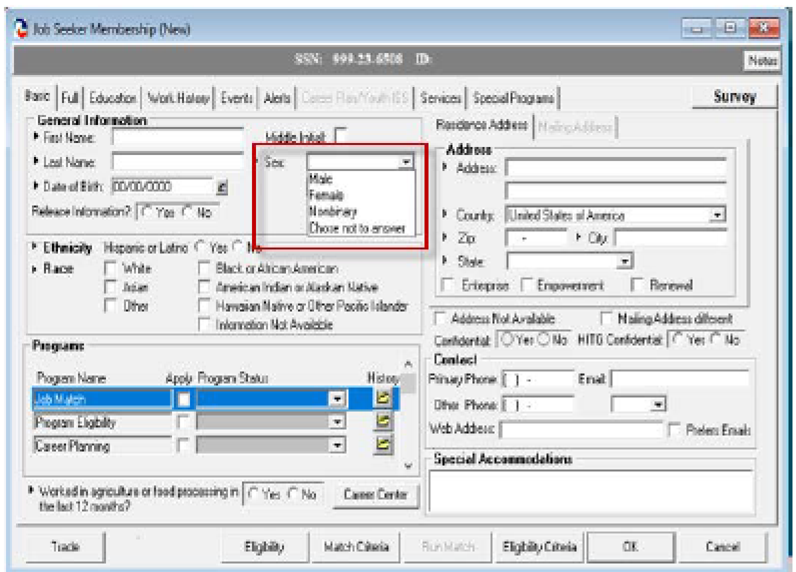
Individuals designated male at birth that are 26 years of age or older and have not registered for Selective Service or cannot provide documentation of registration must obtain a Status Information Letter from Selective Service indicating whether

Please note Selective Service registration requirements apply only to WIOA Title I enrollment, therefore do not apply to basic career services or services authorized by Wagner-Peyser Act, Title III.

Policy: In all cases, compliance with Selective Service registration requirements must be verified for all customers seeking enrollment into WIOA Title I services as well as any program that requires compliance with Selective Service.

The Department of Labor requires data collection of an individual's "Sex", i.e., Male, Female, or Chose not to answer. To meet this Federal requirement the "Gender" field in MOSES has been changed to the "Sex" field. For general information purposes customers will identify their "Sex." The Sex field in MOSES contains the following options, Male, Female, Nonbinary[i], or Chose not to answer.

See MOSES Version 37.0 screen shot of options a customer can choose to identify their "Sex."



The functionality in MOSES no longer automatically qualifies an individual to be Selective Service compliant when the Female box is checked off. Similarly, the

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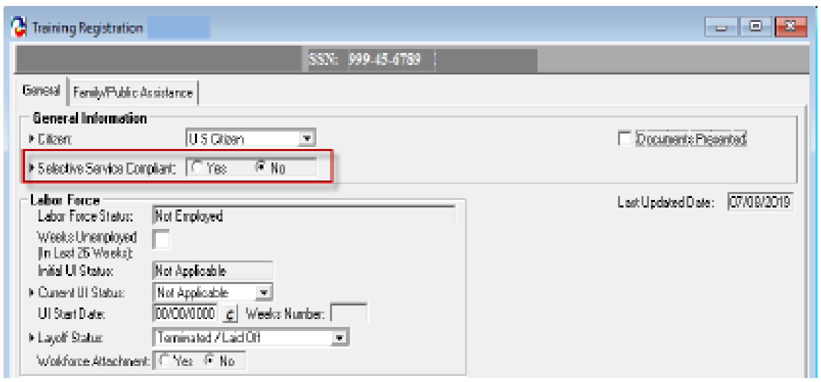
functionality in MOSES does not automatically qualify an individual to be Selective Service compliant based on their age.

At the time of eligibility determination for WIOA Title I services **MassHire staff must verify Selective Service compliance for all customers regardless of stated sex and age.** Please refer to Attachment F: Eligibility Documentation in 100 DCS 18.101.3: Eligibility Requirements for WIOA Title I Adult and Dislocated Worker Program for allowable source documentation to verify Selective Service compliance.

Staff must check "Yes" in the Selective Service Compliant box on the Eligibility tab in MOSES only when Selective Service compliance has been verified.

See MOSES screen shot of Selective Service Compliant check box.



Action Required: Please ensure that all managers and appropriate staff are familiar with the content of this policy.

Effective: Immediately

Inquiries: Please email questions to PolicyQ&A@detma.org.

References: WIOA Section 189 (h)
Selective Service System
Human Rights Campaign, Glossary of Terms

[1] Nonbinary describes a person who does not identify exclusively as a man or a woman. Non-binary people may identify as being both a man and a woman, somewhere in between, or as falling completely outside these categories. While many also identify as transgender, not all non-binary people do.