Quick Reference Guide for OWRA 2.0 Users

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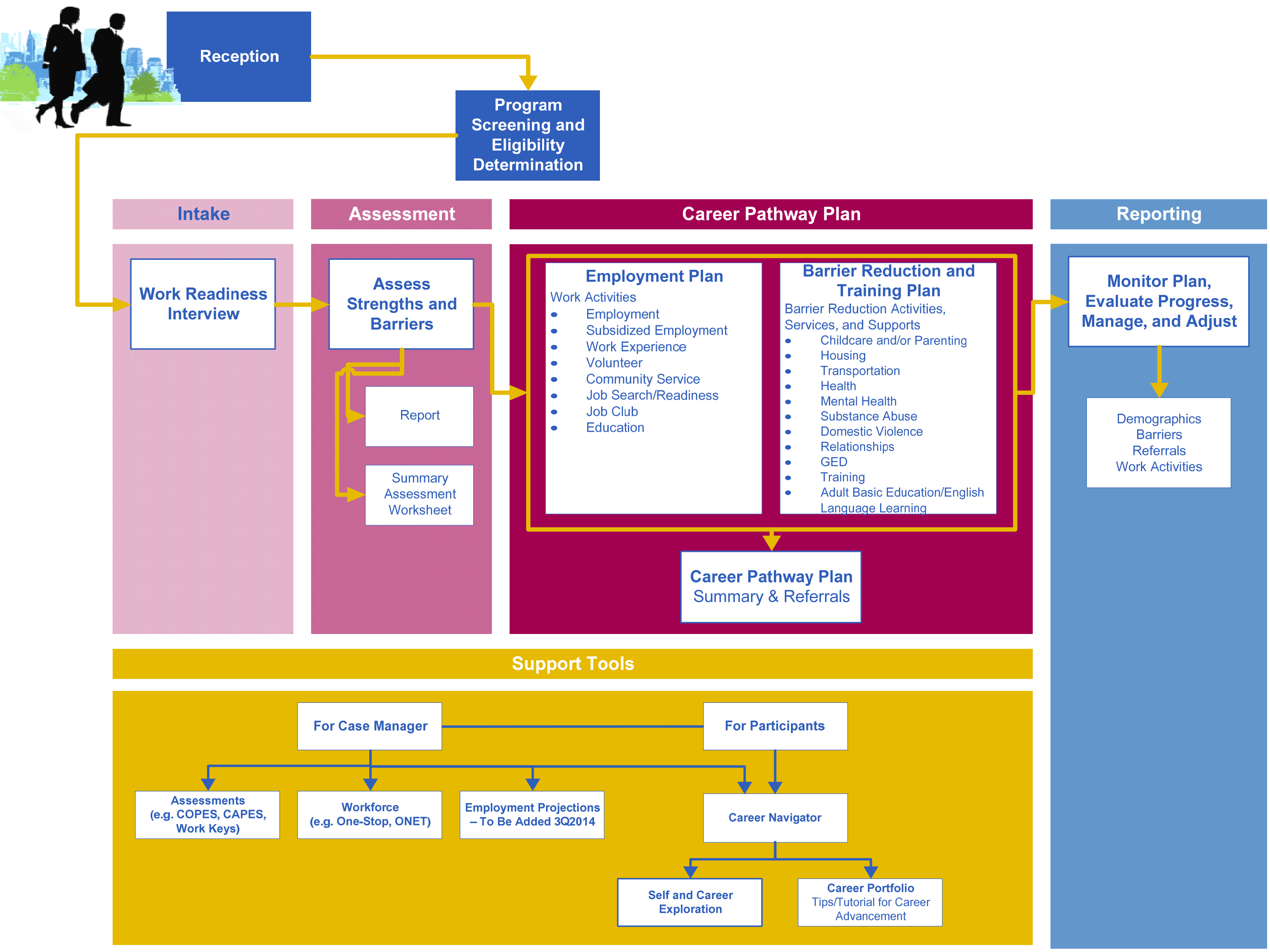
The Online Work Readiness Assessment (OWRA) 2.0 Tool is a comprehensive assessment of the strengths, barriers, and overall work readiness of program participants. Based on the results of the comprehensive assessment, a career pathway plan is generated creating a summary of strengths and barriers; the plan includes work preparation activities and work support recommendations. OWRA 2.0 assists case managers with using a strengths-based approach that recognizes and documents the unique talents, abilities, skills, and life circumstances that can play pivotal roles in the development of a plan to move the client into employment.

OWRA 2.0 Basics

OWRA 2.0 is a set of Web-enabled forms and supporting databases that have been integrated in order to strengthen the ability of users (case managers) to more clearly understand the work readiness needs of clients (participants). OWRA 2.0 is designed to be used by case managers to enhance the client assessment process by providing possible next steps for each client that are aligned with specific information gathered during the assessment interview. Since OWRA 2.0 is completely automated and housed online, the tool reduces the amount of paper-work commonly used during the case management process, while providing a single-point for a variety of commonly used assessment tools.

Note that the term “user” in this Guide refers to the case manager who is using the tool to conduct an intake and assessment interview with a client. The four modules of OWRA 2.0 are Intake, Assessment, Career Pathway Plan, and Reporting. They are interrelated as shown in the schema below.



Navigation

Logging-In

Each OWRA 2.0 user is given a unique and protected username and password to log into OWRA 2.0 and to use the tool with clients.

Starting a new interview or continuing a previous interview

Once the user has logged in, he or she has the option of selecting an interview that has already been started or starting a new interview. To start a new interview, simply click on the New Interview button. To continue on a previously started interview, click on either the first or last name of the client in the interview list and the page will be automatically directed to that interview.

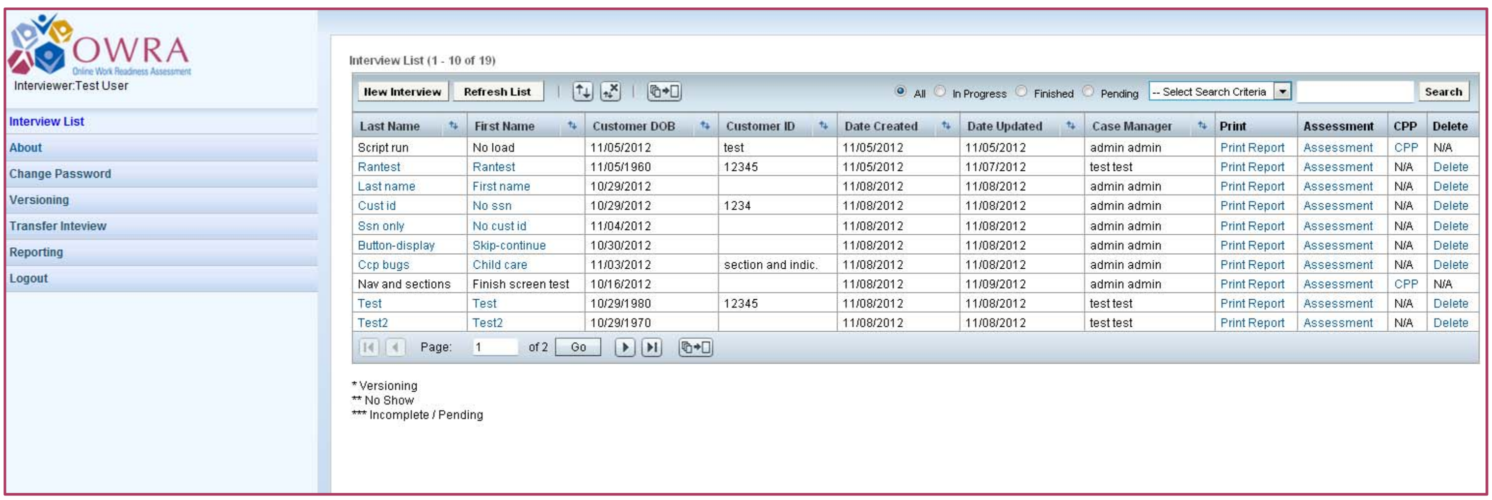
The user may also open an existing interview by clicking on the FIRST or LAST name of the client. Users are also able to search for clients.

Deleting or finishing an interview

Users are able to delete cases that are unfinished only.

If the client's name is in black color ink on the interview list that means that the interview has been completed and "finished" in OWRA 2.0 and if the client's name is in blue color ink it means that the client's interview is still open and additional information can be entered.

Once an OWRA 2.0 interview is finished, responses to the intake questions cannot be modified; the finished interview reflects a "one time snapshot" interview of the client's strengths and barriers.



Last Name	First Name	Customer DOB	Customer ID	Date Created	Date Updated	Case Manager	Print	Assessment	CPP	Delete
Script run	No load	11/05/2012	test	11/05/2012	11/05/2012	admin admin	Print Report	Assessment	CPP	N/A
Rantest	Rantest	11/05/1960	12345	11/05/2012	11/07/2012	test test	Print Report	Assessment	N/A	Delete
Last name	First name	10/29/2012		11/08/2012	11/08/2012	admin admin	Print Report	Assessment	N/A	Delete
Cust id	No ssn	10/29/2012	1234	11/08/2012	11/08/2012	admin admin	Print Report	Assessment	N/A	Delete
Ssn only	No cust id	11/04/2012		11/08/2012	11/08/2012	admin admin	Print Report	Assessment	N/A	Delete
Button-display	Skip-continue	10/30/2012		11/08/2012	11/08/2012	admin admin	Print Report	Assessment	N/A	Delete
Ccp bugs	Child care	11/03/2012	section and indic.	11/08/2012	11/08/2012	admin admin	Print Report	Assessment	N/A	Delete
Nav and sections	Finish screen test	10/16/2012		11/08/2012	11/09/2012	admin admin	Print Report	Assessment	CPP	N/A
Test	Test	10/29/1980	12345	11/08/2012	11/08/2012	test test	Print Report	Assessment	N/A	Delete
Test2	Test2	10/29/1970		11/08/2012	11/08/2012	test test	Print Report	Assessment	N/A	Delete

Above is a screen shot of the OWRA 2.0 interview list with a number of fake client names, along with the left-hand main navigation, that consists of tabs labeled About, Change Password, Versioning, Transfer Interview, Reporting, and Logout.

Versioning is used when the case manager needs to create a new version of an interview, after it has been finished. Generally, this will be necessary if a client leaves your program or stops receiving services, and comes back after several months or years with differences in their situation. In that situation, you would create a new version of the interview and update it to reflect current information.

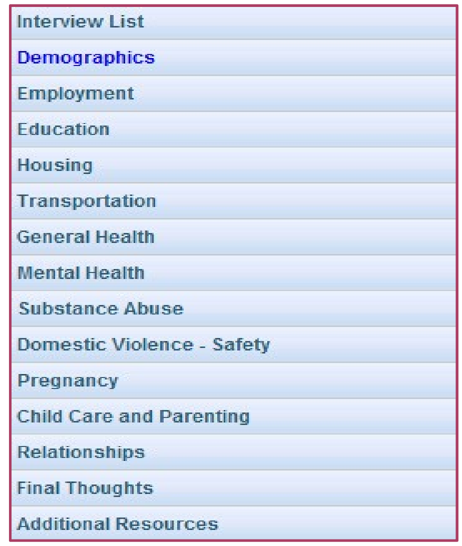
Transfer Interview is used when an interview needs to be transferred between individuals at a site. For example, if one person does Intake, and asks demographic questions, and another user conducts the in-depth assessment, the case can be transferred between users using this functionality.

Note: An asterisk will indicate the status of the interview:

- One asterisk is a versioning case—a case that has been modified
- Two asterisks indicate that the client did not show up for the appointment/interview.
- Three asterisks indicate that the case is incomplete/in progress.

Tip! When logging in, users will see the entire case load through the interview list. For privacy reasons, please do not show this screen to clients.

Left Toolbar



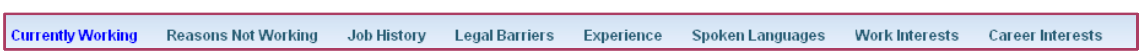
Once the user begins an interview by clicking on an open interview or creating a new interview, the left toolbar appears on the far left side of each page. This toolbar has multiple functions, but mainly it serves as a site guide that provides users with clear indications of the available interview sections contained in OWRA 2.0. Users can click on any of the links on the left toolbar and navigate to and from various sections, even if (s) he has not completed submitting responses to all of the questions in a section.

For instance, to start out an interview by completing the Child Care and Parenting section, simply click on that link and the interview questions pertaining to child care and parenting become available. The user has the option to complete all questions or answer those questions that are most relevant to the client. A simple way to think about it is to imagine OWRA 2.0 as a book and the left toolbar are the chapters within the book. The user may want to skip ahead to the end or jump ahead to a specific chapter, but there is always the option to move from section to section or simply go through the tool from start to finish in the order in which the sections are displayed.

Tip! Users *do not* have to complete every question in every section in order to finalize the interview. Although it is recommended that the user administer OWRA 2.0 in its entirety, there may not be time to fully complete each and every question. Users can complete sets of questions, individual questions, and individual sections and then when time permits, and as needed, come back to complete the remaining questions.

Top Navigation Panel

If the Left Toolbar represents the chapters in the book, the Top Navigation Panel represents the specific pages within those chapters. The Top Navigation Panel is located on every page, except the log-in page and initial (interview list) page. The Top Navigation Panel allows users to jump to the various pages within the specific interviews contained in OWRA 2.0. For instance, users in the Employment section may want solely to focus on the job history of the client. The user can simply click the Job History link within the Employment section to go directly to those questions.



Tip! The OWRA 2.0 tool is intuitive. It saves information automatically as the user navigates from one page to the next (except in the Job History page, where it is important for the user to press the "Save" button each time information about a separate job in the client's history. In addition to this feature, however, there is a "Save" button along the Bottom Toolbar next to the Navigational Arrows that allows the user to save entered information at any time during the interview.

Bottom Navigation Panel

In addition to using the Left Toolbar to navigate the tool, the user can also move from section to section using the Previous and Next arrows located on the left of the Bottom Navigation Panel at the bottom of each page, except the log-in page and initial (interview list) page. Whether moving forward to the next consecutive page or going back to the previous page, these arrows allow the user to move from page to page and section to section. Remember that moving forward (clicking the Next arrow that points to the right) automatically saves information entered previously.

Tip! While using OWRA 2.0, the Internet browser's "back" and "forward" arrows and functions will <u>NOT</u> work. In fact, clicking on the Internet browser back and forward arrows may delete information and does not automatically save information in the tool. Avoid using the back and forward arrows of the Internet browser to ensure that all the information that has been collected is saved.

The Finish button will close out the interview and create a *'read-only'* file that will not allow users to make edits or updates to the interview. The Finish button should only be used when the user has fully completed the interview. For case managers that will be meeting with clients on multiple occasions to complete an interview, it is recommended that the user simply press save to close out of the incomplete, in-process interview.

The Assessment Worksheet button is used to generate the work-activity recommendations as tailored by the individual program. By clicking this button, users are directed to a second page that allows them to select the sections of the assessment that should be printed and/or saved. The user can indicate which section(s) should be printed by selecting each box or, to print the entire interview, select "All Sections" and select "with Notes."

The Print Selection button allows users to print the Report and the answers that the client provided. This *does not* include the recommended actions. This function prints only the questions and answers as provided by the client. Similar to the print options of the Assessment Worksheet, users are directed to a second page that allows them to select the sections of the interview that should be printed and/or saved. Indicate which section(s) should be printed by selecting the appropriate boxes or, to print the entire interview, select "All Sections" and select "with Notes".

Tip! When the user prints the Report or the Assessment Worksheet, Internet browsers often initiate the pop-up blocker. Depending on the computer being used, simply point the cursor to the option to 'Always allow pop-ups from this site'. This will allow users to print each component of the OWRA 2.0 tool with ease.

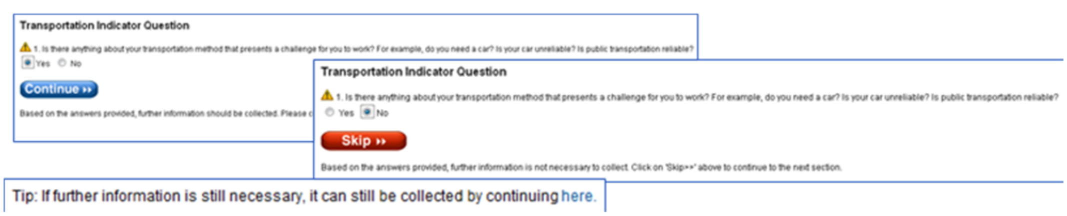
Notes

In some cases, a client will have a lot of information that they would like to share or the OWRA 2.0 user may want to make a note about something that was discussed during the interview. On the right of the Top Navigation Panel, the user will find a Notes button that will open a separate page where additional information from the interview can be documented by the user. Whether it is a reminder that a section is completed or a reminder to follow-up with a client about a specific issue mentioned, this Notes function allows users to jot down additional information for future reference.

The Notes boxes allow 4,000 characters; Notes are included in the final interview and the Notes section is included in the printed assessment.

Indicator Questions

Because each client is unique, the OWRA 2.0 tool recognizes that it may not be necessary to go through each detailed interview section with every client. For this reason, Indicator Questions precede the Housing, Transportation, General Health, Mental Health, Substance Abuse, Domestic Violence - Safety, Pregnancy, Child Care and Parenting, and Relationships sections. The answers provided to the indicator questions will either prompt OWRA 2.0 to move to the corresponding interview section OR automatically skip the corresponding section and move to the next indicator question.



Tip! Even if the client provides responses to Indicator Questions that do not prompt OWRA 2.0 to continue to the corresponding interview questions in that section, as a case manager, the user has the ability to "override" the responses and continue to ask the questions that are included in the section. The user would just click the hyperlinked word in the sentence at the bottom of the page if they believe collecting further information is necessary.

Yellow Exclamation Markers

Throughout OWRA 2.0, users will see yellow exclamation markers that assist in knowing what is most important for completing the interview. Although it is recommended that users complete the entire interview, there may be instances where a user may not answer every question. Even if there are questions left unanswered, OWRA 2.0 will generate an assessment of the client called a Career Pathway Plan, but it may have incomplete data or recommendations. Yellow exclamation markers are provided to indicate which questions are most critical to completing a comprehensive Career Pathway Plan for each client. Users should make every attempt to at least answer each question marked with this icon.

Tip! While it is not required to complete every question in the OWRA 2.0 Tool, the yellow exclamation markers are a built-in resource for users so that they can more fully provide comprehensive services to clients. The indicators are merely tools that call attention to sections that are especially important for the development of an accurate and comprehensive Career Pathway Plan. Users should rely on their best judgment when it comes to determining whether a section is completed to their level of satisfaction for the services they will be providing to clients.

Scrollbars

Depending on the settings of each individual computer monitor, the OWRA 2.0 tool may or may not completely fit onto the screen. If the tool does not fit fully on a user's screen, the user will have a right side scrollbar and a bottom scrollbar that will have to be used in order to view all of the questions or responses. Align the cursor over the scrollbar (within the OWRA 2.0 tool) and move it to the right and left or up and down.

Saving an Interview

In addition to automatically saving responses as the user navigates from page to page through the tool, there is a Save button along the Bottom Toolbar next to the Navigational Arrows that allows the user to save at any time during the interview.

Viewing and Printing an Interview

Once the interview is complete, the user should review it and share the recommendations with the client. To do this, simply click on the Assessment Worksheet button on the Bottom Toolbar. By clicking this button, users are directed to a second page that allows them to select the sections of the assessment that should be printed and/or saved. Indicate which section(s) should be printed by selecting each box or, to print the entire assessment, select "All Sections" and select "with Notes".

To print the Assessment Worksheet that is generated, simply print the Web page exactly as if you were printing any other Internet Web page. Depending on the computer settings, this can be done by going to 'File' and 'Print' on the Internet browsers main navigation toolbar at the top of the computer screen.

Intake and Assessment

The tool begins with a demographics section, moving on to education and employment; the most comprehensive sections of the tool. The Indicator questions, allowing a user to skip a section that is not relevant, begin at the Housing Section and continue through to the end. Below are tips and notes for several sections in order to facilitate a productive user experience.

Employment

This section of the Assessment Module documents the client's employment status, history, and significant employment factors.

Currently Working

On the "Currently Working" tab, there is a question asking which industry the individual has worked in. The industries specified in the tool are taken directly from O*NET (sponsored by the U.S. Department of Labor, Employment & Training Administration,) and are identified as "career clusters" on the O*NET website, click here to learn more about career clusters, and see below for a screen shot from the OWRA tool.

In what industry do you have the most experience?
Select One:

- [ ] Agriculture, Food, and Natural Resources
- [ ] Architecture and Construction
- [ ] Arts, Audio/Video Technology and Communications
- [ ] Education and Training
- [ ] Finance
- [ ] Government and Public Administration
- [ ] Health Science
- [ ] Hospitality and Tourism
- [ ] Human Services
- [x] Information Technology
- [ ] Law, Public Safety, Corrections, and Security
- [ ] Manufacturing
- [ ] Marketing
- [ ] Science, Technology, Engineering, and Mathematics
- [ ] Transportation, Distribution, and Logistics

Job History

In this section the case manager should enter each job held by the client, whether paid or unpaid. After each job is entered, the case manager must hit “Save,” in order to move on to the next job entry. This is the only section of the tool where the case manager MUST save their work.

Domestic Violence - Safety

The Indicator Questions are targeted to both victims and perpetrators of domestic violence. Depending on the responses, OWRA 2.0 will direct the user to complete or skip the section. Be sure to ask both victim and perpetrator indicator questions to male and female clients. If the client does not want to answer these questions or if their partner is present, please do not ask the questions in this section at that time. Note that the client is not answering the questions at that time by clicking the appropriate box.

Pregnancy

This section of the assessment documents whether the client is pregnant (if female) or if someone in their household is pregnant or if someone is pregnant with their child (if male).

By responding that either the client or someone else in the client’s life is pregnant, OWRA 2.0 will direct the user to click “continue” and complete the section. By responding that neither the client nor anyone else in the client’s life is pregnant, OWRA 2.0 will automatically skip the section.

Career Pathway Plan

The Career Pathway Plan (CPP) provides OWRA 2.0 users with the tools to develop an interactive self-sufficiency and employment pathway action plan for clients to outline the steps that need to be taken to achieve gainful employment. The CPP summarizes information from the interview and identifies barriers to obtaining or retaining employment based on answers given in the interview., and can only be accessed once an interview is finished, and is accessed from the Interview Page by clicking on “CPP.” The CPP includes:

- A client’s strengths and barriers
- A client’s overall personal and employment goals
- Clear objectives that lead to achieving those goals
- Specific activities for clients to conduct in order to achieve each objective
- Time periods for completion of activities
- Support services and activities to help clients achieve each objective

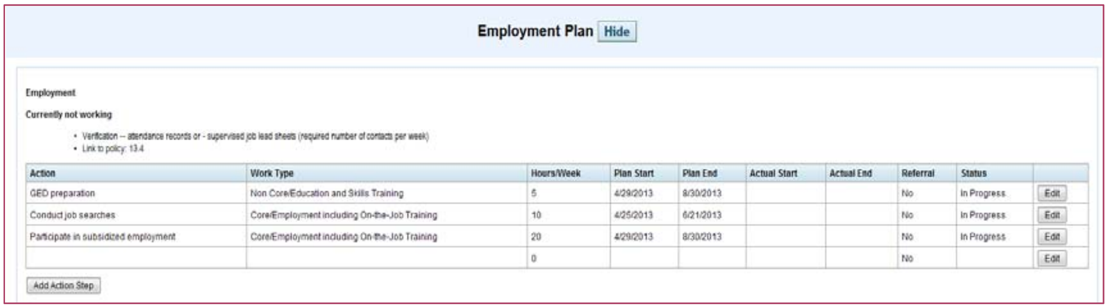
The barriers are grouped based on topic area, such as education, employment, housing, transportation, etc. The case manager may add action steps for each identified barrier to guide the client through their path to self-sufficiency. Based on their own experience in the field, the user may also add action steps in topic areas that were not specifically identified as barriers in the interview.

Several keys to developing a successful CPP are:

- Keep plans focused and targeted
- Challenge your client to develop goals for the short- and long-term

- Help your client look at barriers as diversions, not obstacles
- Show your client the bigger picture
- Stay flexible and realistic

The CPP provides general guidelines for the client as identified through the Intake and Assessment modules. Immediately following these guidelines is a table that captures individual Action Steps, which are designed to capture the steps that relate directly to assisting clients in securing gainful employment.


Employment Plan Hide

Employment

Currently not working

- Verification -- attendance records or - supervised job lead sheets (required number of contacts per week)
- Link to policy: 13.4

Action	Work Type	Hours/Week	Plan Start	Plan End	Actual Start	Actual End	Referral	Status	
GED preparation	Non Core/Education and Skills Training	5	4/29/2013	8/30/2013			No	In Progress	Edit
Conduct job searches	Core/Employment including On-the-Job Training	10	4/25/2013	6/21/2013			No	In Progress	Edit
Participate in subsidized employment	Core/Employment including On-the-Job Training	20	4/29/2013	8/30/2013			No	In Progress	Edit
		0					No		Edit

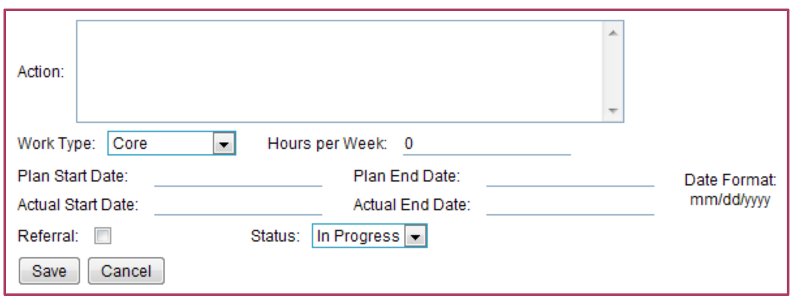
Add Action Step

In specific scenarios, some Action Steps may automatically populate from the Intake and Assessment Modules, corresponding with the recommendations from the client's assessment worksheet. This would differ depending on the type of client the user is working with and the program requirements that are built into the tool. So, if the users' program or organization requires that each client participate in resume writing or dress for success orientation, the tool will be able to automatically input that recommendation if the requisite information is completed in the assessment modules of the tool.

In all cases, in order to edit action steps, the case manager should simply click the "Edit" button. Clicking on this button will produce a drop down menu that will allow OWRA 2.0 users to edit the action steps and the corresponding information, including:

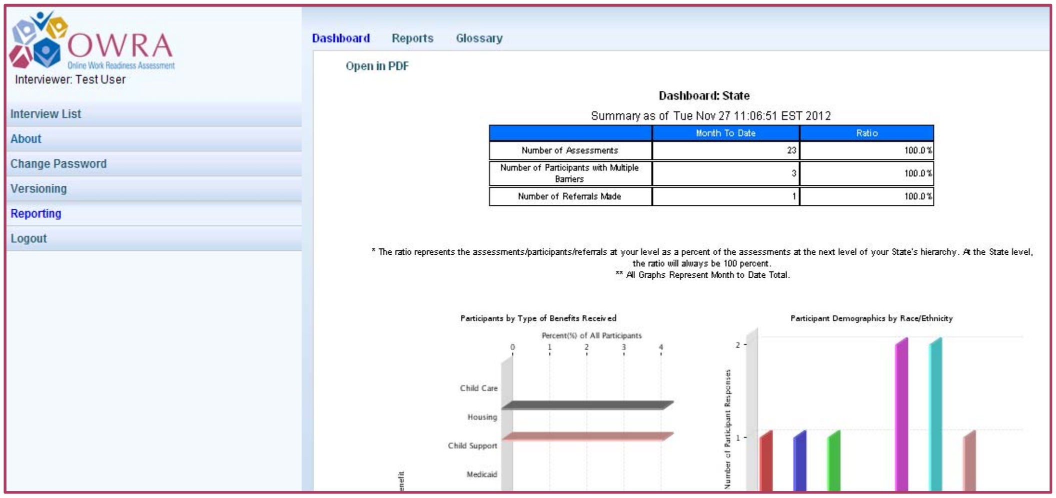
In order to add a new action step the user must click on the button "Add Action Step". Clicking on this button will produce a drop down menu that will allow users to enter new action steps and the corresponding information.

Important Note! While in the "Edit" or "Add Action Step" Screen, the OWRA 2.0 user cannot type in any other portion of the CPP. Users must click on "Save" or "Cancel" to exit this screen and gain access to the rest of the CPP.



Reporting

The Reporting Module is a program management and reporting tool focusing on creating summary and trend analyses of clients' demographics, barriers, skills assessments, and other work readiness determinants identified and collected in the Intake, Assessment, and Career Pathway Plan Modules.



This Module collects real-time data for the previous month, including Participants by Type of Benefits Received, Participant Demographics by Race and Ethnicity, Participants by type of Referrals Made, and Participants by Type of Barriers. That allows case managers, supervisors, leadership and other stakeholders to: (1) understand the characteristics and demographics of their clients on various aggregate levels; 2) to better recognize the needs of those clients; and, (2) to use the data to inform strategies used at the case management, supervisory, and administrative levels to design and customize programs to meet clients' needs. The Reporting Module has three main features: the Dashboard, Reports, and the Glossary.

Dashboard

The Dashboard provides an at-a-glance view of the data at various levels, with visuals of graphs and charts that present health and client-level information. The dashboard will display the most current data available for the period starting at the beginning of the current month and ending at the current date. Consequently, reports generated on the first day of a particular month will not have any month to date information available. The Dashboard display real-time data, as every time the source data is updated, the dashboard is also updated.

Report

OWRA 2.0 is set to generate six standard reports, each of which provides a taxonomy of top-level barriers and subcategories. Subcategory entries map to sets of responses in finalized interviews conducted by case managers.

The six standard reports are as follows:

- Demographic
- Employment History and Career Preferences
- Educational Attainment
- Barriers—Transportation, Housing & Legal
- Barriers—Health
- Barriers—Child Care, Domestic Violence and Well-Being

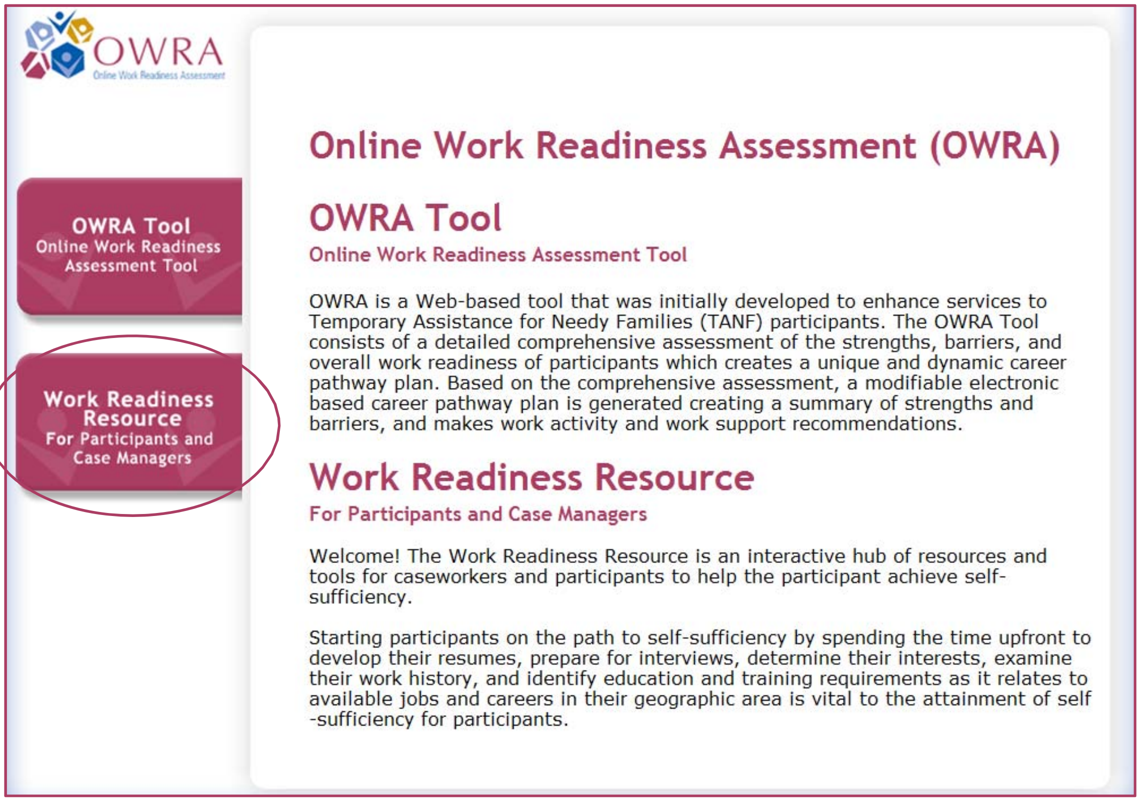
Each report can be viewed at one of the five hierarchical "levels": Supervisor; Center/office level administrator; County administrator; District administrator; and State level administrator. Users can run reports to view OWRA 2.0 cases immediately one level up and one level down in the hierarchy. The default display shows the report level based on the login information.

Users can also specify a date range. The default is "all cases to date".

Glossary

The Glossary contains definitions of important or frequently encountered concepts to help users navigate through the reporting system.

Work Readiness Resource



The Work Readiness Resource of the Online Work Readiness Assessment equips OWRA 2.0 users and clients with options to explore the world of work and use a series of resources that improve the ability of clients to more fully move into work or education, and to improve their parenting and relationship skills. This section of the tool is not password- protected and is meant to be a resource for OWRA 2.0 users and the clients they serve.

For Clients

The “For Clients” link helps clients learn about their interests, abilities, and skills. The “For Case Managers” link helps OWRA 2.0 users learn about the world of workforce development and labor market information. OWRA 2.0 users can work with the clients to make certain that they fully use the available resources.

Under the “For Client’s” section, clients will be able to access resources for developing a roadmap for their career. There are three levels tailored to a client’s level of work readiness. The three levels start with basic work exploration activities and resources, then provide clients with tools for understanding their education and training and skill-levels, and then conclude with a set of tools and resources to better assist OWRA 2.0 users and clients in understanding labor market information and building a plan to more effectively improve a client’s ability to progress on a career path.

Level One allows clients to start to explore the initial stages of work exploration. Clients can learn how to develop an effective resume, draft cover letters, prepare for and conduct an interview, create a career portfolio that includes tools for users to more effectively respond to employer needs, and learn how to budget and manage money.

Throughout the “For Clients” section, clients will notice that there are different activities—takeaways—that are meant to help OWRA 2.0 users and clients actively capture the learning. This activity allows the client to develop a chronological resume which is a job-specific resume that lists jobs in order by year. This provides employers with a snapshot of one’s job history and allows the employer to see basic job-related qualifications.

Once clients have completed Level One they can move on to Level Two. Here clients receive resources to more closely identify their work related skills and abilities and how to match skills and interests to those often in the job market. Clients should work with their case manager to establish career goals and objectives. If a case manager is not available, Level Two will provide some important insights on setting a path for personal development and work preparation.

Level Three is for those who are more work ready and have some work history. Users should make certain to have access to outside websites and have the requisite level of comprehension. Clients should work with their case managers whenever possible to maximize the use of Level Three.

For Case Managers

The “For Case Managers”section provides information, resources, and tools that OWRA 2.0 users can use to help clients become self-sufficient. The information in this section will also help users and clients to work together to build the Career Pathway Plan.

After clicking the “For Case Managers” link, users will be able to use many tools that will help them to serve clients so that they can become more self- sufficient. The tools that are available on this page includes a description of the three levels that clients will use as they explore careers, a brief overview of common concepts that users might come across when exploring jobs and careers with clients, and information about difference jobs and careers—this information is divided into subsections which users can click on and review:

- For Clients Overview
- Key Words and Concepts and Exploring Jobs, Occupations, and Careers Overview
- Identifying and Addressing Barriers to Employment and Budget Management
- Different Work Assessments
- Explore Useful Web Sites for Entering the World of Work
- Overview of Career Pathways and Clusters
- Understanding Labor Market Information
- Labor Market Information Resources

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