



# Quick Reference Guide for OWRA Users

April 2016

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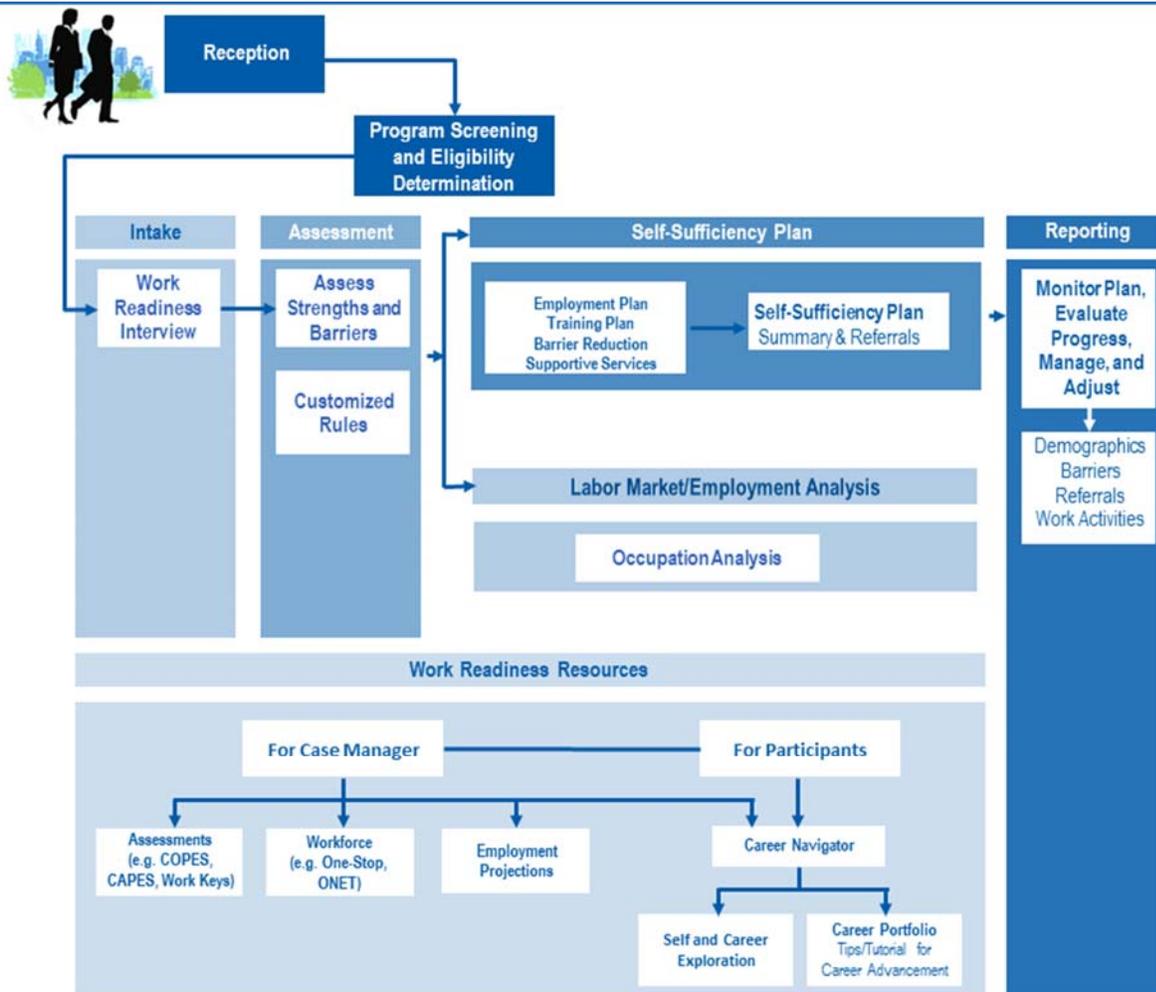
In the last decade Temporary Assistance for Needy Families (TANF) programs have begun to undertake redesign efforts that increase their focus on front-end services and assessments. As a go-to resource that supports clients as they move toward real self-sufficiency, the **Online Work Readiness Assessment (OWRA)** is a specialized, web-based suite of tools and assessments that help human service agency staff make important decisions about client readiness to secure employment and meet work participation targets. Today, a range of TANF, workforce, and Healthy Marriage and Responsible Fatherhood programs are using OWRA. To date, over 1,000 state and local programs have downloaded OWRA and adopted or adapted the tool to meet their organization’s assessment needs.

OWRA’s web-based platform offers an innovative approach to creating a plan for clients that summarizes their strengths and barriers, and makes recommendations on placement into work activities and work supports. It offers social service agency caseworkers and staff services for clients through five modules. OWRA’s modules include:

- The Benefits of OWRA**
- A specialized, comprehensive, online resource.
  - Promotes better understanding of client needs.
  - Streamlines intake processes.
  - Moves participants into work activities faster and with better results.
  - Helps program administrators make better and more effective resource decisions.
  - Provides applicable recommendations based on data collected and customized to the organization.

Intake Module	Assessment Module	Self-Sufficiency Plan (SSP) and Work Readiness Resource	Employment Projections	Reporting Module
Data is collected on client demographics, employment and educational background, household composition, and finances.	Organizes the information collected in the Intake Module and develops a comprehensive “snapshot” of barriers and strengths to work. This module serves as the foundation for the resulting SSP.	The SSP highlights client strengths, suggests recommendations for reducing client barriers, and allows for customized referrals and recommendations to address barriers and develop a career pathway. In addition, a portal of Work Readiness Resources is available to help caseworkers and participants explore resume writing, soft skill development, interests, abilities, and labor market information.	Provides participants with state and local labor market information for occupations in line with their educational backgrounds, interests, and skills.	Streamlines business processes by providing aggregated information over a specified period of time about client population demographics, employment and education history, barriers, and career preferences. Enables organizations to make data-based decisions about referral strategies, services, partners, and programs based on client needs.

The five modules of OWRA are Intake, Assessment, Self-Sufficiency Plan (SSP), Employment Projections and Reporting. They are interrelated as shown in the schema below.



## 1. Overview of the Quick Reference Guide

This guide can help case managers and supervisors (users) effectively administer OWRA. It provides an overview of the structure of the tool, then follows the path that a case manager would typically navigate through the tool when assisting a client.

This Quick Reference Guide outlines how to log in to OWRA, initiate a case, document responses to questions, capture additional notes, generate recommendations and employment projections, and use the reporting functions. The guide includes screenshots from the OWRA Training site with regard to a fictional client to illustrate important features of OWRA. The guide also includes occasional tips that will prove to be useful when navigating through a particular feature of OWRA. In addition, users will find the **Helpdesk** phone number and email address in the footer of every page.

**Tip!** This version of the Quick Reference Guide pertains to OWRA 4.0. At the end of the User Guide, there are Frequently asked Questions (FAQs) pertaining to earlier versions of OWRA. For a previous

version of the Quick Reference Guide, please contact the OWRA HelpDesk at [OWRA@icfi.com](mailto:OWRA@icfi.com) or 1-866-989-6972.

## 2. Technological Requirements

OWRA should be used on Chrome, Firefox, or Internet Explorer 9 or above. Users will need a high-speed Internet connection; this is a broadband-type connection, not dial-up access. Users should be on a Fast Ethernet connection with approximately 100Mbps throughput.

For good performance on a wireless connection, a minimum actual throughput would be 20–50Mbps for an 802.11g/n standard compliant wireless network. The actual rate can be much lower, depending on the number of simultaneous connections. Thus, a hardline connection is recommended.

**Tip!** When using OWRA, make sure that the popup blocker is disabled because several sections in the tool require that you are able to accept popups (e.g., resource links, print function).

**Tip!** In Google Chrome, some fields may auto-populate data, such as first name, last name, and more. To turn off that feature:

Select the Chrome menu icon  (the three horizontal bars in the top right corner of the browser).

Select “Settings.”

Click “Show advanced settings” (at the bottom of the page).

Go to the “Passwords and forms” section.

Deselect the “Enable Autofill to fill out web forms in a single click” checkbox.

**Note:** If this setting requires elevated permission, users should work with their local network administrators.

**Tip!** For users in IE 10, do not operate OWRA in compatibility view. To check:

Open IE10 and select “Tools”

Scroll down and select “Compatibility View Settings”

Verify that any URL that ends with “.workquotient.com” is not listed under “websites you’ve added to Compatibility View”

Please also be sure that when users are on the “.workquotient.com” environments (training and production), there is not a check mark next to “Compatibility View” in the “Tools” dropdown screen. Otherwise, we suggest using Google Chrome until we have an update on the issue.

### 3. Getting Started and Navigation

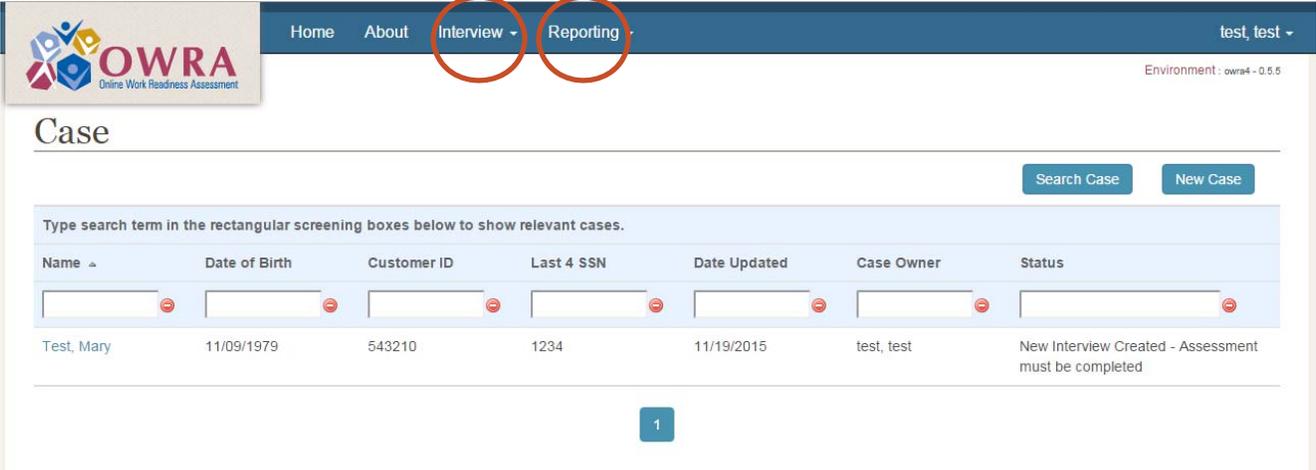
#### 3.1 Home

OWRA is divided into two sections: (1) the OWRA tool, which is password protected, and (2) the Work Readiness Resource (WRR), which is publicly available. See the Resources section of this guide for more details on the WRR. The following section pertains to the password-protected portion of the tool.

#### 3.2 Logging In and Main Navigation

Each OWRA user is given a unique usernames and password. For security purposes, users should immediately personalize their passwords and then keep this information confidential.

After logging in, a users Case List is displayed, which is a list of the names of every individual who has been interviewed by or assigned to the case manager. If the user is a supervisor, they will also see the names of people appraised by the case managers that report to them.



The screenshot shows the OWRA Case List interface. At the top, there is a navigation bar with 'Home', 'About', 'Interview', and 'Reporting' links. The 'Interview' and 'Reporting' links are circled in red. Below the navigation bar is the 'Case' section with 'Search Case' and 'New Case' buttons. A table lists case details for 'Test, Mary'.

Name	Date of Birth	Customer ID	Last 4 SSN	Date Updated	Case Owner	Status
Test, Mary	11/09/1979	543210	1234	11/19/2015	test, test	New Interview Created - Assessment must be completed

The user may also navigate to the Case List by clicking on “Interview” on the top of the OWRA toolbar, or access Reports from there as well.

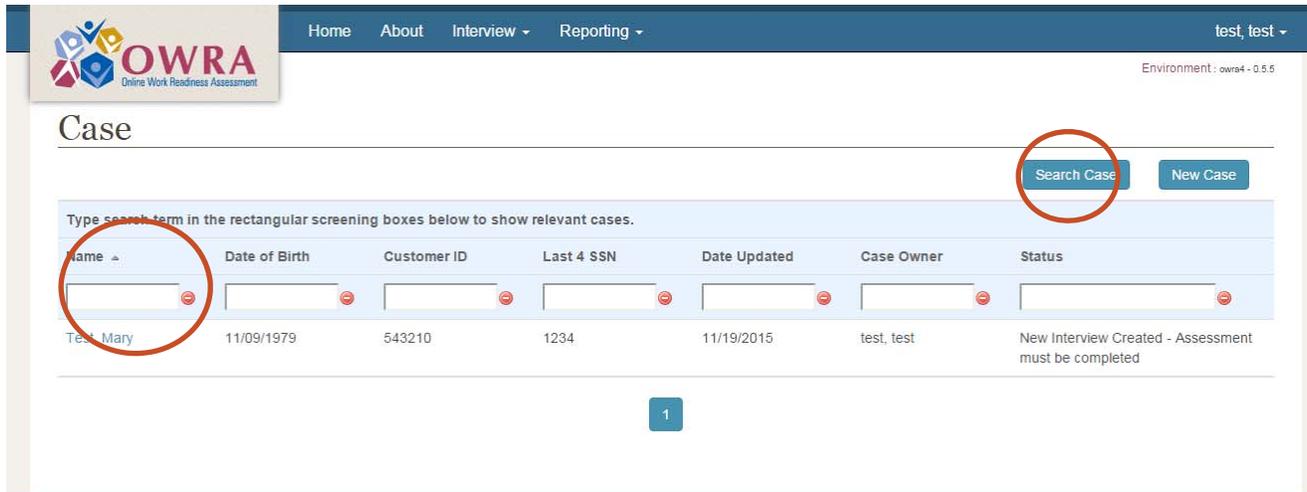
#### 3.3 Starting a New Case or Continuing a Previous Case

Once users have logged in, they have the option of selecting an open case or starting a new case. Both of these tasks are done via the Case List. Users may select a client on their Case List, or they may click on the “New Case” button on the top right of the screen.

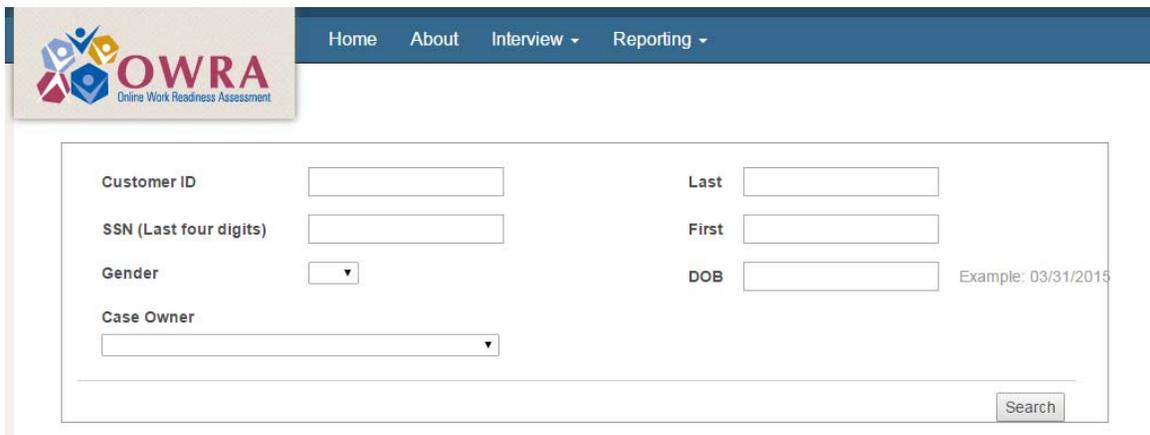
#### 3.4 Filtering, Sorting, and Searching for Existing Cases

To filter their Case List, users must type a partial or complete phrase in one of the rectangular screening boxes above the Case List. For name, the user would type in the last name and all users with that last name would appear.

Users are also able to sort the Case List in descending or ascending order by clicking on the triangles to the right of the criteria in the Case List: Name, Date of Birth, Customer ID, Last 4 SSN, Date Updated, Case Manager, and Status.



A user may also click on the “Search Case” button on the top right of the screen, enter information in one or more search fields, and then select “Search.”



If a client has been interviewed before, an Interview List will appear when the user selects the client’s name in the Case List. The Interview List displays all of the previous interviews conducted with that client. From the Interview List, a user may either open an interview that has already been started or begin a new interview. To open an existing interview, click on the date in the “Date Updated” column.

If a client has never been interviewed before, the user will need to start a new case. To do that, simply click on the “New Case” button on the upper right of the Case List.

**Tip!** *If you create a new interview within 365 days of an old interview, all of the fields that were previously filled will be pre-populated in the new interview. After 365 days, only the required 6 pieces of information will be included in the new copy.*

**Tip!** A “case” is everything in OWRA relating to one client—all of the interviews, questionnaires, recommendations, and appraisal summaries. An “interview” is the combination of the questionnaire and the recommendations and appraisal summary (synonymous with “appraisal”).

**Tip!** The cases that you see on your Case List are determined by your role and level within the hierarchy. For example, a case manager will only see his/her own cases in the Case List, while a supervisor will see both his/her own cases and the cases created by users that report directly to the supervisor.

**Tip!** Using the “Search” function as opposed to sorting or filtering your case list will draw from a wider pool of applicants. If you are a case manager or supervisor and you search for client Jane Doe, Jane Doe will appear as a result even if you did not create the case. If you attempt to open the case, however, you will receive a “Permission Denied” screen, unless you are in the same hierarchy as the case manager who created the case. Quality Assurance users, however, can view all case information for any search results in their organizational unit.

### 3.5 Saving and Exiting a Questionnaire

Every 15 minutes, OWRA automatically saves the questionnaire. If a user wishes to leave the questionnaire at any point during the interview (as long as s/he has finished the four (4) required fields in the Demographics tab), s/he should click “Exit” at the top or bottom of the questionnaire. This will return the user to the Case List in OWRA and save the data that has been entered.



If NO changes are made to an interview, clicking “Exit” will NOT create a new interview, and no information will be saved. This functionality prevents unwanted interviews from being created in the event that a user selects an existing client’s interview but then determines that s/he either does not need to add new data, has accessed the wrong client’s information, or wants to exit the interview without creating a new version of it.

After 60 minutes of inactivity, access to the tool times out. The user is warned that his/her session will end 1 minute prior to the timeout. The user is then logged out of the tool.

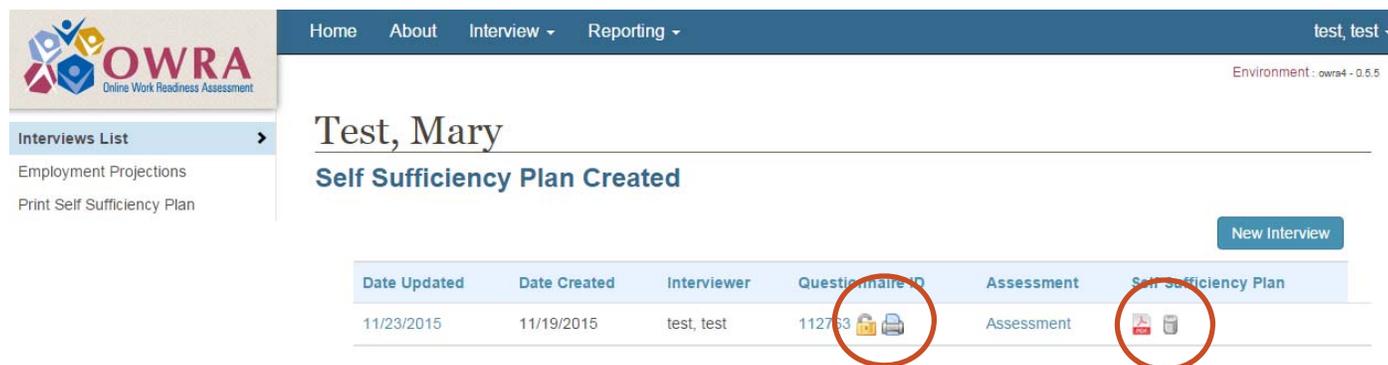
**Tip!** There are four required fields in OWRA, all of which are in the General Information subtab within

*Demographics: First Name; Last Name; DOB; and Gender. If information is not entered in these fields, or entered incorrectly, the interview will not save. Once the required fields are completed correctly, OWRA will automatically save, then auto-save every 15-minutes thereafter and when user presses "Exit".*

**Tip!** Note that, once created, cases and interviews may not be deleted.

### 3.6 Printing

To print a questionnaire, select the print icon next to the Questionnaire ID on the Interview List. This allows users to print the answers that the client provided. A printed questionnaire **does not** include any recommendations. Users are directed to a page that allows them to select the tabs of the interview that should be printed, either with or without notes.



The screenshot shows the OWRA interface for a user named 'Test, Mary'. The page title is 'Self Sufficiency Plan Created'. Below the title is a table with the following columns: Date Updated, Date Created, Interviewer, Questionnaire ID, Assessment, and Self-Sufficiency Plan. The first row of data shows: 11/23/2015, 11/19/2015, test, test, 112763, Assessment. In the 'Questionnaire ID' column, there is a print icon circled in red. In the 'Self-Sufficiency Plan' column, there is a PDF icon circled in red. A 'New Interview' button is visible in the top right corner of the table area.

To print the SSP, click on the pdf in the "Self-Sufficiency Plan" column, which you can then print.

## 4. Tool Administration

### 4.1 Organizational Hierarchy

OWRA has varying levels of access depending on the organizational hierarchy: state, county and office for a TANF organization, or just one level for a small nonprofit. Within each level of the hierarchy, users access to data depends on their user role. A case manager can see the cases they create, their supervisor can see the cases created by that case managers, etc.

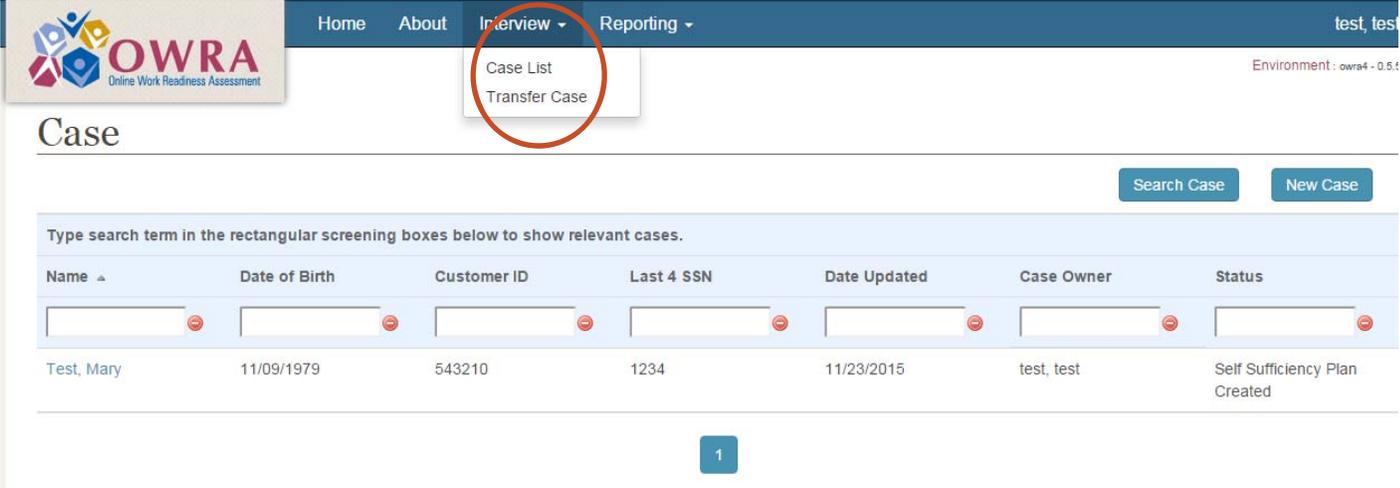
User roles and hierarchy are created by the administrators at each organization, and they will supply users with a clear description of their rights and responsibilities.

### 4.2 Case Transfer

Case managers and supervisors are able to transfer interviews among themselves if needed. Case managers can transfer cases within their office, while supervisors can transfer cases across offices, regions and counties at their level of the organization. In one common example, if one case manager conducts the intake and another conducts the in-depth appraisal, the case may be transferred

between case managers. Both case managers can stay associated with the case or the original case manager can be removed and case access turned over to the new case manager.

To transfer a case, a case manager or a supervisor (that are assigned to the case or are within the supervisor’s supervisory structure) may select “Transfer Case” under “Interview” in the top-level navigation, then the user must enter the Customer ID, Client name, and the name of the user to whom they are transferring the case, then select “Transfer Case.”



The screenshot shows the OWRA Case management interface. At the top, there is a navigation bar with 'Home', 'About', 'Interview', and 'Reporting' menus. The 'Interview' menu is expanded, showing 'Case List' and 'Transfer Case' options. Below the navigation bar, there is a 'Case' section with a search bar and a table of cases. The table has columns for Name, Date of Birth, Customer ID, Last 4 SSN, Date Updated, Case Owner, and Status. A search bar is located above the table with the instruction: 'Type search term in the rectangular screening boxes below to show relevant cases.' The table contains one row of data for 'Test, Mary'.

Name	Date of Birth	Customer ID	Last 4 SSN	Date Updated	Case Owner	Status
Test, Mary	11/09/1979	543210	1234	11/23/2015	test, test	Self Sufficiency Plan Created

## 5. Intake and Assessment Module

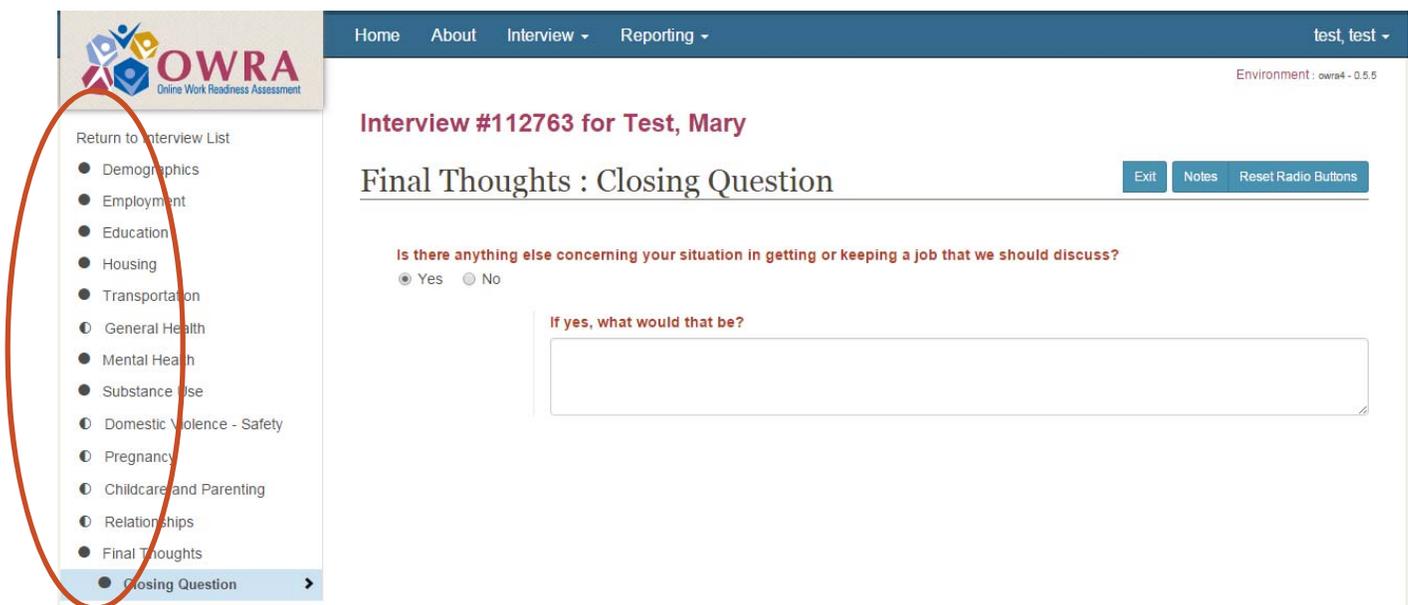
Throughout the questionnaire, there are instructions in italics to guide the user. For example, one of the subtopics under the Employment tab asks about why an individual is not working. The directions state that the user should not read the possible answers aloud, but rather have a conversation with the client and select the appropriate response based on the conversation.

The following are the tabs for the questions in OWRA:

- Demographics
- Employment
- Education
- Housing
- Transportation
- General Health

- Mental Health
- Substance Use
- Domestic Abuse – Safety
- Pregnancy
- Child Care and Parenting
- Relationships
- Final Thoughts

Within the Assessment, there are circles next to each tab title that indicate whether or not a tab has been opened. If a circle is completely filled in, then a user has at least entered each sub-tab in that tab. If a circle is half-filled in, then a user has entered at least one tab but not all of the sub-tabs for that topic.



**Tip!** When conducting an interview, the “Back” button in your browser will be automatically disabled if you are using Chrome/Firefox or Internet Explorer 10 or above. Users of Internet Explorer 9 will receive a popup warning. This setting prevents the loss of data when selecting the “Back” button.

**Tip!** There are three situations which will lock an interview for further editing. When these these situations occurs, a new interview will automatically be created if the case manager attempts to open the locked interview, after they enter the 6 required fields (described below).

1. An SSP is generated. That automatically locks the interview so next time a questionnaire in the case

*gets touched a new version is created.*

*2. An interview is created, but no SSP is generated, and 14 days pass. After 14 days an interview automatically becomes locked.*

*3. A new interviewer adds an interview to an existing case.*

## 5.1 Demographics

The Demographics tab captures detailed information in the following sub-tabs:

- General Information
- Household Composition
- Finances/Benefits

OWRA will not create or save an interview unless the four required fields are populated. Once they are populated, an interview is automatically saved.

- First Name
- Last Name
- Date of Birth
- Gender (male, female, or other)

These fields are marked with an asterisk (\*).



The screenshot shows the OWRA web application interface. The top navigation bar includes 'Home', 'About', 'Interview', and 'Reporting'. The sidebar on the left lists navigation options: 'Return to Interview List', 'Demographics', 'General Info', 'Household', 'Finances', 'Employment', 'Education', 'Housing', 'Transportation', and 'General Health'. The main content area displays 'Interview #112763 for Test, Mary' and 'Demographics : General Info'. Below the title, there are two radio button options: 'Client did not show for assessment' (circled in red) and 'Case is Incomplete / Pending'. A note states 'The fields marked with an asterisk (\*) are required.' Below this, the 'First Name' field is populated with 'Mary'.

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If a client does not show up for an interview, a user may indicate this information at the top of the General Information screen under the Demographics tab. This interview may be edited at another time.

In addition to General Information, the Demographics tab includes subtabs that explore household and finances.

**Tip!** Under the Finances/Benefits sub-tab, if a client is receiving benefits but does not know the exact amount, you may indicate this information in the “Notes” section.

**Tip!** When documenting language fluency, you should indicate English fluency even if that is the client’s native language.

**Tip!** In order to save time during the interview, you may want to complete the Demographics tab before the client shows up for the interview.

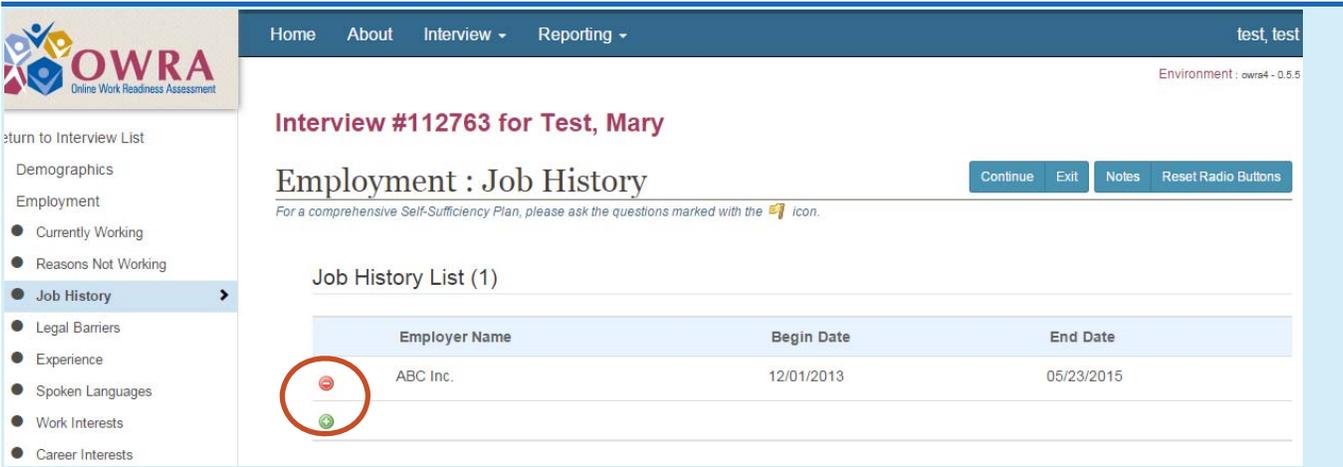
**Tip!** Depending on the settings of each computer monitor, scrollbars may appear on the screen to ensure full access to the questionnaire. For full visibility, hover the cursor over the scrollbar (within the OWRA tool) and move it to the right and left or up and down as needed. This is particularly important for the Household sub-tab.

## 5.2 Employment

This tab documents client employment status, history, and significant employment factors through the following sub-tabs:

- Current Activities
- Reasons Not Working
- Job History
- Work Experience and Interests
- Legal Barriers

**Tip!** The Job History sub-tab provides an opportunity for you to document a client’s previous experiences. To create a comprehensive profile of a client’s capabilities, interests, and skills, you should enter every job held by a client, whether paid or unpaid, including community service. To enter a job, click the “+” button and enter the information for each job.



Home About Interview Reporting test, test  
Environment: owra4 - 0.5.5

**Interview #112763 for Test, Mary**

**Employment : Job History** Continue Exit Notes Reset Radio Buttons

For a comprehensive Self-Sufficiency Plan, please ask the questions marked with the  icon.

Job History List (1)

Employer Name	Begin Date	End Date
 ABC Inc.	12/01/2013	05/23/2015
		

### 5.3 Education

The Education tab captures detailed information in several sub-tabs:

- Highest Grade
- Diploma, Degree, and Certificate
- Other Education, Training, Certificate
- Learning Difficulties

English

The Highest Grade sub-tab captures the highest level of completed education. The Learning Needs Assessment is a standardized assessment that is the first step in the evaluation process related to learning needs. It is not a diagnostic screening, but instead identifies whether a referral to a learning disability specialist for an evaluation is an appropriate next step for a client. If so, this will be indicated in the SSP.

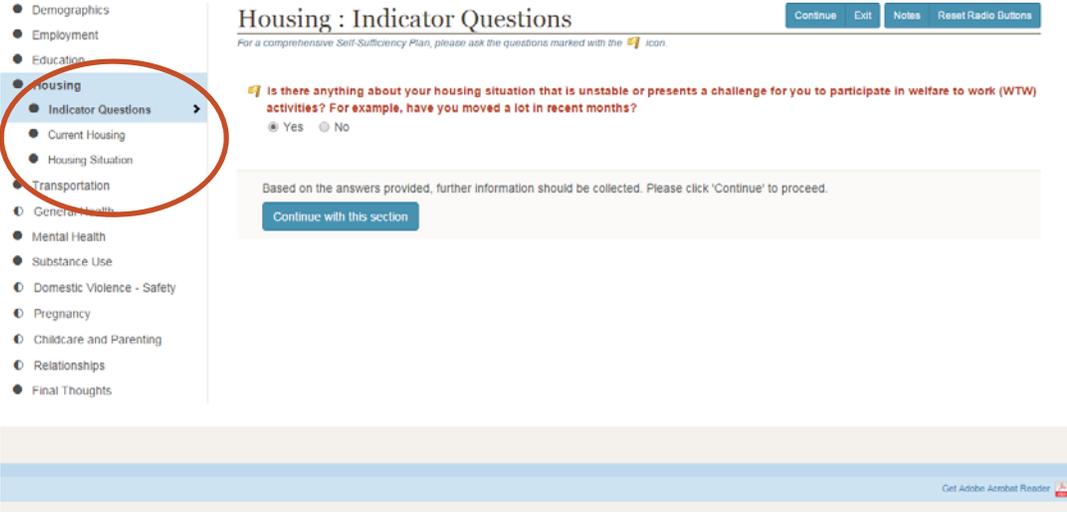
### 5.4 Indicator Questions

OWRA detects instances when it may not be necessary to go through each interview tab with every client. For this reason, Indicator Questions precede the following tabs:

- Housing
- Transportation
- General Health
- Mental Health

- Substance Use
- Domestic Abuse – Safety
- Pregnancy
- Child Care and Parenting
- Relationships

The answers provided to the Indicator Questions will either prompt the user to move to the corresponding questionnaire tab or skip the corresponding tab and move to the next indicator question.



**Tip!** Even if the client provides responses to Indicator Questions that do not prompt OWRA to continue to the corresponding interview questions in that tab, you have the ability to override the responses and continue to ask the questions that are included in the tab. Select “Continue” in the top right or bottom right of the screen to do so, or manually navigate to the next sub-tab.

## 5.5 Housing

After users enter client responses to the Indicator Questions, they have the option of entering the following sub-tabs under the Housing tab:

- Current Housing
- Housing Situation

These sub-tabs include questions that explore the stability of the client’s housing situation. The questions also inquire about the client’s current housing situation, how often the client has moved, any utility shut-off notices, and eviction notices.

**Tip!** *If a client shares information that was not captured in the OWRA Questionnaire, you may document this information using the “Notes” feature. Click on the “Notes” button on the top right of the assessment screen and a popup window will open for you to input information.*



*You may decide whether to print the Assessment with or without notes. This gives the case manager the flexibility to record necessary information that should be kept confidential.*

## 5.6 Transportation

The Transportation tab includes the following sub-tabs:

- Transportation Method
- Driving License
- Transportation Challenge

These sub-tabs include questions about daily travel, and the reliability and feasibility of the client’s transportation options, including whether the client has a driver’s license.

## 5.7 General Health

The General Health tab includes Indicator Questions. This tab captures the overall health of the client.

**Tip!** *There are no sub-tabs within the General Health tab. You should record additional information in the “Notes” section as needed.*

## 5.8 Mental Health

The Mental Health tab includes the following sub-tabs:

- Mental Health
- Diagnosis

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These sub-tabs include questions about many topics, such as depression, fear, and anxiety. Users may also indicate client responses regarding how often they feel any of the listed emotions or mental illnesses.

### 5.9 Substance Use

The Substance Use tab contains the following sub-tabs:

- Alcohol and Drugs
- Substance Use in the Household/By Others

These sub-tabs collect information on how often (if at all) a client uses alcohol or drugs, if the client has ever tried to stop, if it is a problem now or has been in the past, and if it is a problem for anyone else in the household.

### 5.10 Domestic Abuse – Safety

The Domestic Abuse – Safety tab includes the following sub-tabs:

- Domestic Abuse – Victim Questions
- Safety Concerns – Victim Questions
- Domestic Abuse – Perpetrator Questions
- Domestic Abuse – Human Trafficking Questions

There are Indicator Questions under this tab that are geared toward both potential victims and perpetrators of domestic abuse. Both sets of questions should be asked regardless of the client's gender. Depending on the responses, OWRA directs the user to complete the questions in the related sub-tab or skip to the next tab.

**Tip!** *If the client does not want to answer Domestic Abuse – Safety questions, or if the partner is present, skip this tab. You may select the appropriate box to indicate that the client has chosen not to answer the questions.*

**Tip!** *You should be mindful of a client's emotional state as s/he explores topics within this tab. If the client appears to be agitated or uncomfortable during the conversation, consider taking a break from the interview and offering the client some water or a bathroom break.*

### 5.11 Pregnancy

The Pregnancy tab of the questionnaire includes the following sub-tab:

- 
- Pregnancy

Within this tab, a user can document whether a client is pregnant (if female), if someone in the client's household is pregnant (if client is female or male), or if someone is pregnant with the client's child (if male). Females who were entered under the Household tab will be automatically pulled into the Pregnancy tab (no matter the age) if the client indicates that someone in the household is pregnant.

If a user indicates that a client or someone else in the client's life is pregnant, OWRA will direct the user to select "Continue" and complete the sub-tabs within Pregnancy. By responding that neither the client nor anyone else in the client's life is pregnant, OWRA will automatically skip the remainder of the questions under this tab.

**Tip!** *The tool will not automatically gray out the question "Is someone pregnant with your child" if the client is female; therefore, you should use your own judgment regarding whether or not to ask that question of a female client.*

### 5.12 Child Care and Parenting

The following sub-tabs are included under the Child Care and Parenting tab:

- Children Issues
- Primary Caregiver
- Parenting and Child Support
- Childcare
- Status of Children
- Backup Childcare Plan

Based on information entered under the Household sub-tab within the Demographics tab, the names and ages of any children less than 20 years of age entered in that sub-tab will be automatically filled into the Childcare and Parenting tab.

**Tip!** *If there are multiple other parents (e.g., there are two children and each has a different father), you may select the "Other" option and include information regarding the client's relationship with each of the other parents in the "Other" option field.*

### 5.13 Relationships

The Relationships tab includes the following sub-tab:

- Relationships

Information about a current romantic relationship or a client’s relationship with friends and family should be entered here. This tab also explores the strength of the client’s support network.

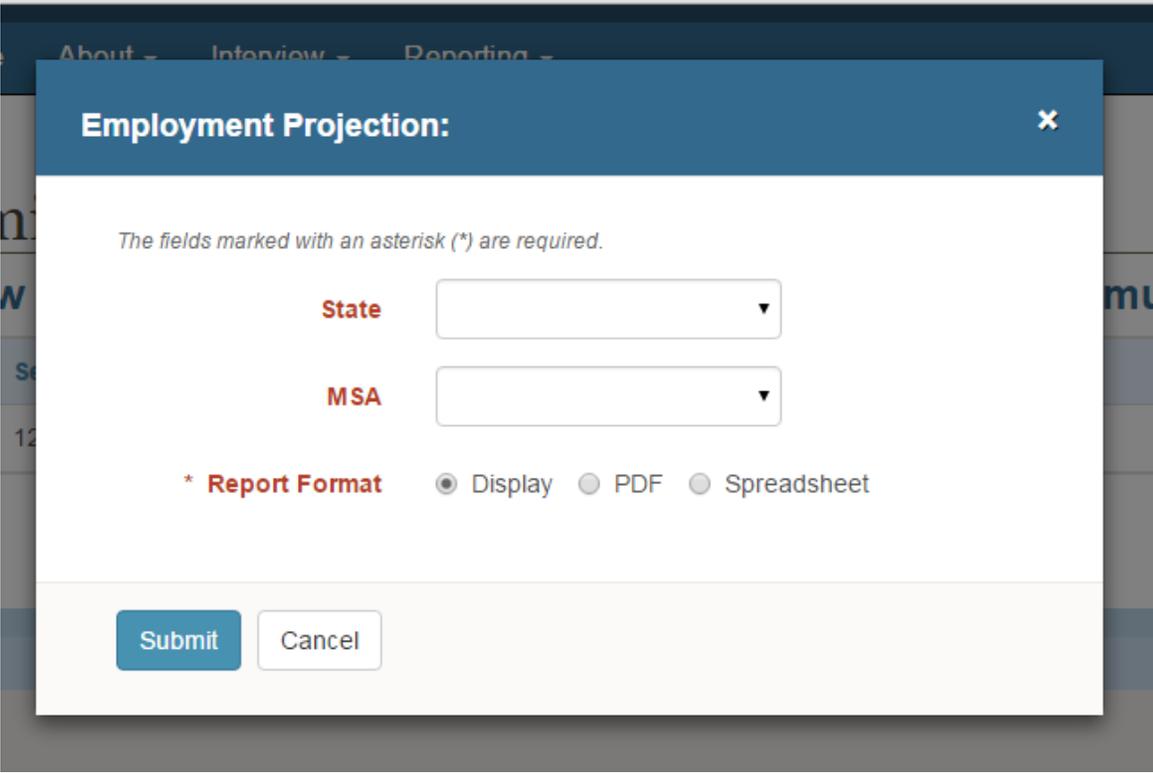
### 5.14 Final Thoughts

This tab is a blank text box that provides an opportunity for the user to document any final thoughts that were not captured in the previous questions or “Notes” section.

## 6. Employment Projections

After a user completes the questionnaire and exits the interview, they will return to the client’s Interview List. The case manager will then have enough information to generate the Employment Projections, a list of careers that are projected to grow that match the user’s interests, education and employment history.

To access Employment Projections, select the tab on the left-hand navigation on the Interview List. A pop-up will occur, asking the case manager to select the appropriate state, MSA (meaning geographic region) at how the user would like the information displayed.



**Employment Projection:** ✕

*The fields marked with an asterisk (\*) are required.*

**State**

**MSA**

**\* Report Format**  Display  PDF  Spreadsheet

Once you have selected appropriately, the following table is displayed, with the list of careers on the far left. The table includes the current employment in that career, projected increase, median hourly wage, education requirements, skill level, and more.

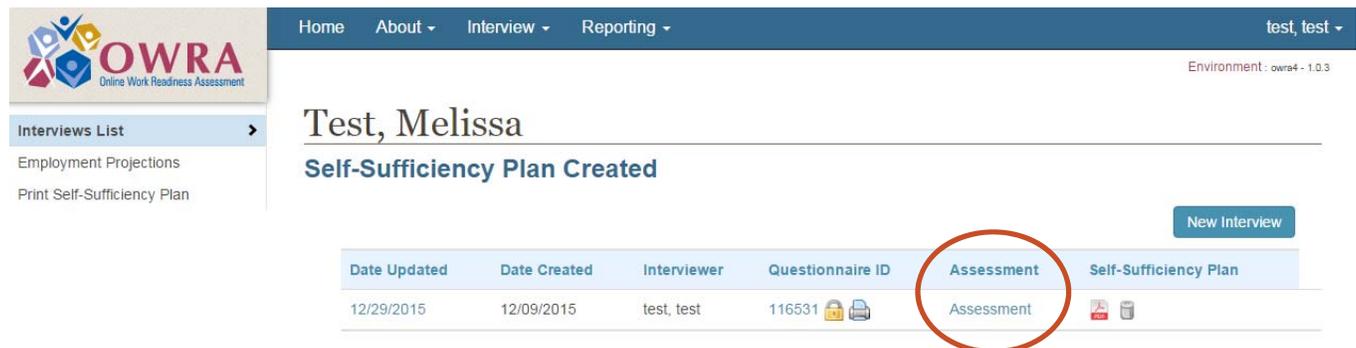
**Occupations with the Greatest Projected Job Increases 2013 - 2020**

Area: Denver-Aurora

Title	2013 Employment	Projected 2020 Employment	Employment Change 2013-2020 NUMBER	Employment Change 2013-2020 PERCENT	Natural Growth Openings 2013-2020	Seven Year Replacement Rate (US)	Replacement Openings 2013-2020	Total Projected Openings 2013-2020	Median Hourly Wage 2013 (US)	Entry Level Education (US)	On-the-Job Training (US)	Skill Level
Chief Executives	5.21	5.722	0.512	9.83%	512	0.1491	777	1,289	85.77	Bachelor's degree	None	High
Industrial Production Managers	1.567	1.73	0.163	10.40%	163	0.1274	200	363	47.78	Bachelor's degree	None	High
Miscellaneous Social Scientists and Related Workers	0.638	0.728	0.09	14.11%	90	0.1162	74	164	38.68	Bachelor's degree	None	High
Agricultural and Food Science Technicians	0.293	0.322	0.029	9.90%	29	0.2527	74	103	17.79	Associate's degree	None	Medium
Biological Technicians	1.023	1.165	0.142	13.88%	142	0.21	215	357	21.02	Associate's degree	None	Medium

**7. Self-Sufficiency Plan/Assessment**

After a user completes the questionnaire and exits the interview, they will return to the client's Interview List. From there, the user must review the Self-Sufficiency Plan/Assesment generated by OWRA based on the answers to the questionnaire, by selecting "Assessment."



The screenshot shows the OWRA web application interface. At the top, there is a navigation bar with 'Home', 'About', 'Interview', and 'Reporting' menus. The user is logged in as 'test, test'. The main content area displays 'Test, Melissa' and a notification 'Self-Sufficiency Plan Created'. Below this, there is a table with the following columns: 'Date Updated', 'Date Created', 'Interviewer', 'Questionnaire ID', 'Assessment', and 'Self-Sufficiency Plan'. The 'Assessment' column contains the word 'Assessment' and is circled in red. A 'New Interview' button is visible in the top right corner of the table area.

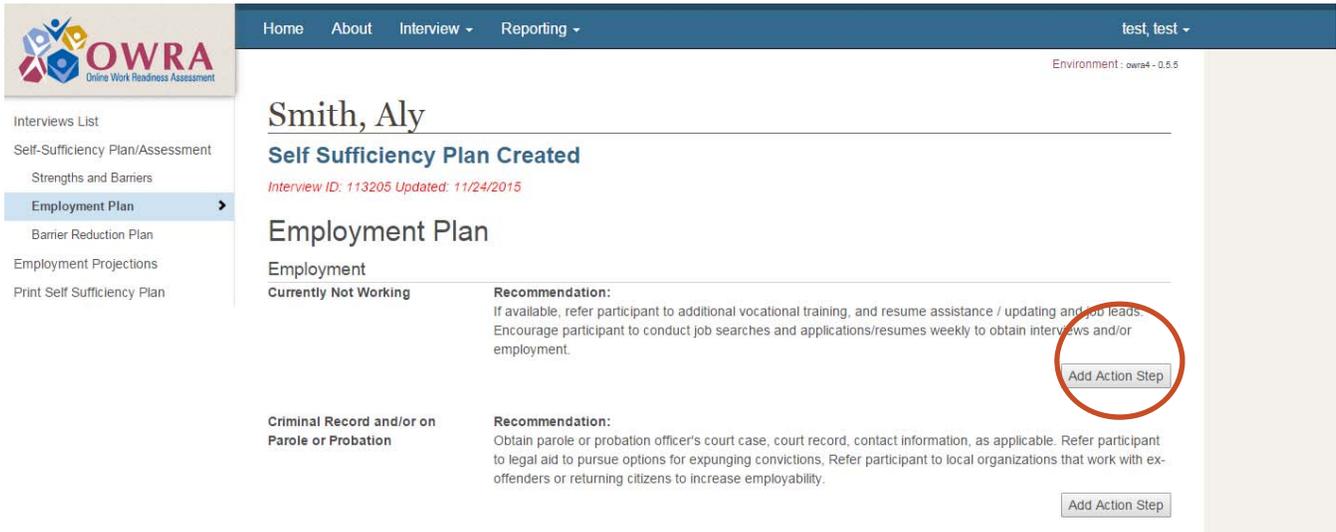
Date Updated	Date Created	Interviewer	Questionnaire ID	Assessment	Self-Sufficiency Plan
12/29/2015	12/09/2015	test, test	116531	Assessment	

This section is divided into three tabs:

- Strengths and Barriers
- Employment Plan
- Barrier Reduction Plan

The Strengths and Barriers aggregates and summarizes data from the questionnaire. The Employment Plan and Barrier Reduction Plan make recommendations to the client based on their identified issues,

and allow the user to add their own recommendations, or action plans. The Action Plan could direct the client to an appointment with a mental health services provider, or it could say that an issue was identified as a barrier but has already been dealt with by the client so it is no longer considered a barrier.



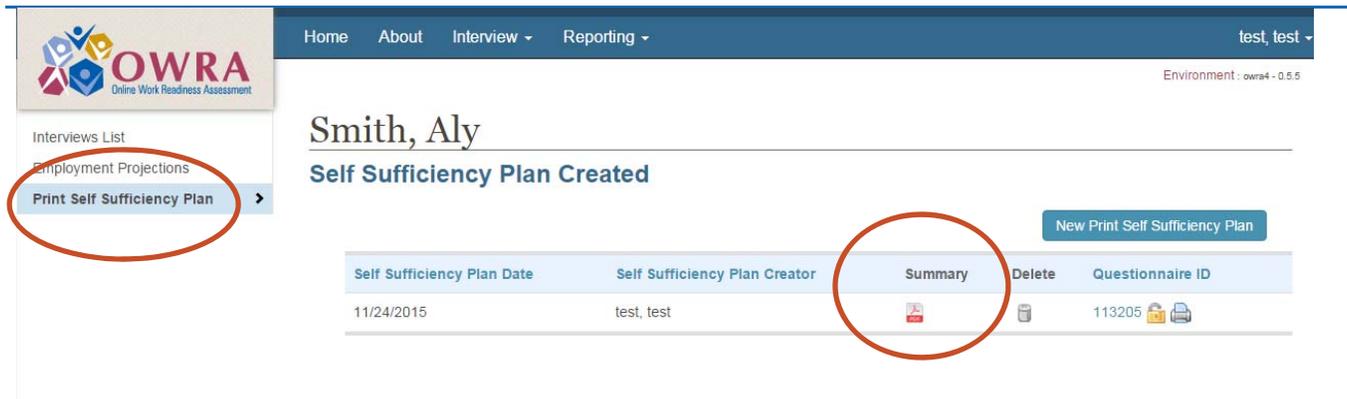
The screenshot shows the OWRA web application interface. The top navigation bar includes 'Home', 'About', 'Interview', and 'Reporting' tabs. The main content area displays the profile for 'Smith, Aly' with a 'Self Sufficiency Plan Created' notification. The 'Employment Plan' section is active, showing two categories: 'Currently Not Working' and 'Criminal Record and/or on Parole or Probation'. Each category has a 'Recommendation' and an 'Add Action Step' button. The 'Add Action Step' button for 'Currently Not Working' is circled in red.

## 6.1 Printing the Self-Sufficiency Plan

The SSP is a PDF summary of the client's demographic, household, and financial information, as well as the strengths, barriers, recommendations, and action items associated with them. It includes:

- Client Information
- Household Composition
- Work Participation (if TANF)
- Finances
- Strengths and Barriers
- Referrals
- Employment Plan
- Barrier Reduction Plan

To open and view the SSP, a user may select the document icon located under the SSP column of the client's Interview List, or they may find the same document icon by clicking the Print Self-Sufficiency Plan subtab on the left.



Home About Interview Reporting test, test Environment: owra4 - 0.5.5

**Smith, Aly**

**Self Sufficiency Plan Created**

Print Self Sufficiency Plan

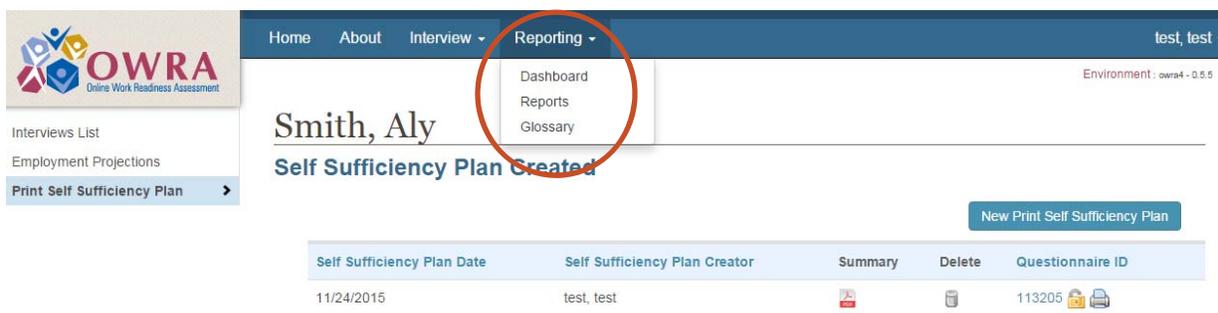
New Print Self Sufficiency Plan

Self Sufficiency Plan Date	Self Sufficiency Plan Creator	Summary	Delete	Questionnaire ID
11/24/2015	test, test			113205 

The SSP may be used as an agreement or contract between a client and an OWRA user, and may be referenced later in order to track client progress. At the bottom of the SSP is a place for a client, a user, and a supervisor to sign their names.

## 8. Reports Module

The Reports module is a program management function that creates summary and trend analyses of clients' demographics, barriers, skills, and other work readiness determinants identified in the questionnaire. This module may be accessed through the top menu bar, and includes data from completed cases only. Users may select whether they want to access targeted reports or the Dashboard. The Dashboard provides an at-a-glance view of the data available at their level in the hierarchy within OWRA. For example, users in an office will see data for that office. Users at the County level will see data for all of the offices within that county.



Home About Interview Reporting test, test Environment: owra4 - 0.5.5

**Smith, Aly**

**Self Sufficiency Plan Created**

Print Self Sufficiency Plan

New Print Self Sufficiency Plan

Self Sufficiency Plan Date	Self Sufficiency Plan Creator	Summary	Delete	Questionnaire ID
11/24/2015	test, test			113205 

The purpose of the Reports module is to provide real-time data that enables case managers, supervisors, leadership, and other stakeholders to:

- View a glimpse of agency statistics, such as the number of appraisals.
- Recognize the needs of those clients by better understanding the characteristics and demographics of the clients.

- 
- Use this data to improve targeted services at the case management, supervisory, and administrative levels.

### 8.1 Dashboard

The summary table shows month-to-date the number of cases for which an SSP has been generated. The numbers are for the users organizational unit and the ratio represents data from the users organizational unit as a percent of data at the next higher level in State hierarchy. At the State level, the ratio will always be 100 percent.

The graphs that are displayed on the dashboard are as follows:

- Clients by Type of Benefits Received
- Client Demographics by Race/Ethnicity
- Clients by Type of Referral Recommended
- Clients by Type of Potential Barriers
- Distribution of Clients by Number of Potential Barriers

### 8.2 Reports

Just as with the Dashboard, cases are included in Reports when an SSP has been generated. OWRA is set to generate six standard reports, each of which provides a taxonomy of top-level barriers and subcategories.

The six standard reports are as follows:

- Demographics
- Educational Attainment
- Employment History and Career Interests
- Potential Barriers – Legal, Housing, and Transportation
- Potential Barriers – Health and Substance Use
- Potential Barriers – Child Care, Domestic Abuse, and Well-Being

After selecting a specific report, the user then selects a date range, the format of the report (display, pdf or excel), and the report level in the hierarchy.

Reports can be customized to specify data from one level above user's organization level and/or

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downwards to lower levels in the organizational hierarchy. If a user is a Supervisor in a county, for example, they have access to reports for their consortia, their county, and any offices within their county. If the user is a case manager in an office, they will see reports for their region and for their office.

## 9. Work Readiness Resource (WRR)

This interactive hub of resources and tools will help clients achieve self-sufficiency. There are separate hubs for OWRA users and clients. Guidance is provided for a number of workforce preparedness activities, such as developing resumes and cover letters. Clients can access the WRR from anywhere, so case managers can ask their clients to look through the information and activities at home or at a library.

WRR for clients and for case managers are available prior to logging in to OWRA, on the screen below, and also from the “About” tab on the top-level navigation after login.



The screenshot shows the OWRA website interface. At the top right, there are links for "Home" and "Sign In". Below the navigation bar is the OWRA logo. The main content area is divided into two columns. The left column is titled "OWRA Tool" and "Online Work Readiness Assessment Tool". The right column is titled "Work Readiness Resource" and "For Participants and Case Managers".

**OWRA Tool**  
Online Work Readiness Assessment Tool

OWRA is a Web-based tool that was initially developed to enhance services to Temporary Assistance for Needy Families (TANF) participants. The OWRA Tool consists of a detailed comprehensive assessment of the strengths, barriers, and overall work readiness of participants which creates a unique and dynamic career pathway plan. Based on the comprehensive assessment, a modifiable electronic based career pathway plan is generated creating a summary of strengths and barriers, and makes work activity and work support recommendations.

**Work Readiness Resource**  
For Participants and Case Managers

Welcome! The Work Readiness Resource is an interactive hub of resources and tools for caseworkers and participants to help the participant achieve self-sufficiency.

Starting participants on the path to self-sufficiency by spending the time upfront to develop their resumes, prepare for interviews, determine their interests, examine their work history, and identify education and training requirements as it relates to available jobs and careers in their geographic area is vital to the attainment of self-sufficiency for participants.

### For Clients

Under the “For Clients” section, clients will be able to access resources for developing a roadmap for their careers. 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 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.

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 their skills and interests to those often found in the job market. Clients should work with their case managers 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 who have some work history. Clients should work with their case managers whenever possible to maximize the use of the Level Three resources.

#### In Level One, you will:

- Learn how to write a resume;
- Learn about writing cover letters;
- Explore all the things you need to do to get ready for an interview;
- Create a career portfolio;
- Address barriers to employment with resources on crisis management, domestic violence support, and help for returning to work after incarceration;
- Learn how to budget and manage money; and
- Learn about what employers are looking for in their employees!

#### In Level Two, you will:

- Identify your previous education and training experiences;
- Learn about your skills;
- Explore and identify your interests;
- Identify your abilities as they relate to the world of work;
- Look at why you should explore your interests, abilities, and skills;
- Set career goals and objectives; and
- Explore work-related resources!

#### In Level Three, you will:

- Further explore your abilities and what you value in a work environment (work values);
- Understand and explore labor market information;
- Explore information about jobs and occupations;
- Learn about career pathways and the knowledge and skills that are similar across multiple occupations;
- Get information about jobs, training, and opportunities in your local area or state; and
- Build a personal education plan of education, training, and work experience opportunities!

### For Case Managers

The “For Case Managers” section provides information, resources, and tools that OWRA users can access to help clients become self-sufficient. The tools that are available on this page include 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 different jobs and careers. This information is divided into subsections that 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

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- Overview of Career Pathways and Clusters
  - Understanding Labor Market Information
  - Labor Market Information Resources

## **Appendix**

[Additional OWRA Tips!](#)

[Frequently Asked Questions \(FAQs\)](#)

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## Additional OWRA Tips!

Here are a few things to remember as you use the tool:

- To begin a new case, click the “New Case” button on the Case List. DO NOT enter information in the search fields at the top of the Case List.
- After completing the Demographics tab, you may navigate throughout the interview.
- The blue circles help you to remember where you have been. If a tab is completely blue, this means that you have clicked on all of the sub-tabs under that tab. If it is partially blue, this means that you have clicked on at least one sub-tab under that tab.
- Case managers have the ability to override the result of an indicator question by clicking “Continue” to answer the tab questions, or manually navigating through the hierarchy.
- The “Notes” section in the upper right-hand corner can be used to capture any information that is not specifically asked in the tool.

## Frequently Asked Questions (FAQs)

### **1. What is the Online Work Readiness Assessment (OWRA) and what information is collected by OWRA?**

The Online Work Readiness Assessment (OWRA) Tool is a specialized, Web-based suite of resources, tools, and assessments that help social service agency staff make decisions about a customer’s readiness to successfully secure employment and meet work participation target rates.

With OWRA, agency professionals can record information about their participants, identify barriers that may impact a participant’s immediate and long-term employability barriers such as health, transportation, housing, and childcare. Simultaneously the tool selects and implements education, training, and work-related activities in a participant’s self-sufficiency plan.

The system collects, stores, reports, and transmits sensitive information collected in interviews, such as names, addresses, social security numbers, health information, information regarding children and other family members in the participant’s household and where relevant information on substance abuse, and domestic violence. This information can only be retrieved by authorized persons (i.e., those with approved system IDs and password) and is not exchanged with any other system or users outside the agency where the information was collected.

### **2. How much does OWRA cost?**

The OWRA application, as well as documentation to assist with deployment and necessary

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customization, is provided free, as a courtesy of the Office of Family Assistance. Any costs associated with OWRA will be in terms of hosting, customization, configuration, specific requirements, and integration needs, which will vary based on existing technology, needs, and whether the work is done in-house or via a vendor.

### **3. How do I learn to use OWRA?**

Use this Guide in conjunction with the training site to practice using the tool with made-up information. The practice site can be found here: <https://peerta.acf.hhs.gov/owra/owra-tool>. The username and password are test/test. For more help, contact the Helpdesk at [OWRA@icfi.com](mailto:OWRA@icfi.com) or 866-989-6972.

### **4. What is the Work Readiness Resource (WRR) and how are they intended to be used with a client?**

The WRR is divided into sections for clients and case managers. The section for clients allows them to explore and learn about their interests, abilities, and skills. This section has **three** levels of activities, information, and links around career exploration for clients to progress on the road toward self-sufficiency. The three sections progress from initial career exploration to understanding labor market information. In all three levels, clients can take advantage of the Takeaways, which are activities and fact sheets for them to use to record information or learn about themselves. The case manager can assign the client sections to review at home and Takeaways to do at home because the WRR is not password protected, or the case manager can review the sections with the client in person.

### **5. What are the action plans that can be associated with the recommendations? Do I have to create an action step for each recommendation?**

An action plan is a specific action that a case manager assigns to a client in order to comply with the recommendation in OWRA. If a recommendation is to refer an individual to a financial management class, for example, the action plan might be "Referred client to financial management class at X location on X date, ending on X date."

### **6. What if I decide a recommendation is not appropriate or relevant for a client? Can I delete or remove a recommendation from the appraisal summary?**

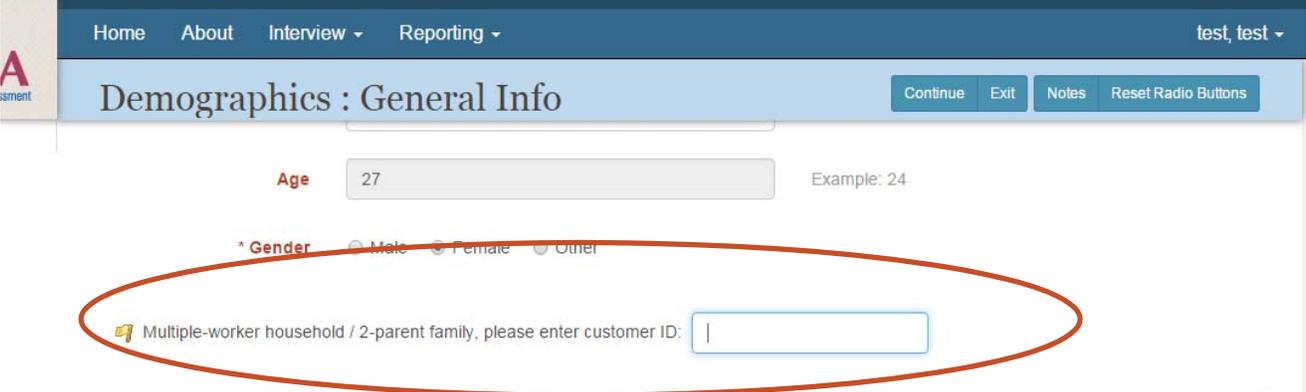
Recommendations cannot be deleted because they are automatically generated by the tool. However, an action plan can be created for a specific recommendation stating that it is not relevant in this case. This will appear in the ASR and will be part of the client's record.

### **7. Where do I add information about referrals? What if I determine that the client needs a referral for a category that does not have a recommendation in OWRA?**

Referrals are made in an action plan, via a checkbox.

### **8. What if two people (husband and wife) come in for an interview. Can I conduct one interview in OWRA for two people?**

OWRA is designed to screen one individual at a time. However, two individuals can be linked in OWRA so that the case manager is aware that the clients have a relationship to one another. In the Demographics tab of the second person to be interviewed, the case manager must add the first individual’s customer ID.



Home About Interview Reporting test, test

**Demographics : General Info** Continue Exit Notes Reset Radio Buttons

Age 27 Example: 24

\* Gender  Male  Female  Other

Multiple-worker household / 2-parent family, please enter customer ID:

### 9. What do the circles next to the Topic tabs mean?

The circles indicate whether a tab has been viewed. If a circle is completely filled in, it means that each sub-tab has been viewed; if it is half filled in, it means that at least one sub-tab has been viewed. The circles are meant to be used as guideposts for the case manager because the interview does not need to be completed in order, so they can be helpful for indicating which tabs still need to be completed.

### 10. How do I transfer a case to another case manager?

Case managers and supervisors are able to transfer interviews among themselves if needed. Case managers can transfer cases within their office, while supervisors can transfer cases across offices, regions and counties at their level of the organization. In one common example, if one case manager conducts the intake and another conducts the in-depth appraisal, the case may be transferred between case managers. Both case managers can stay associated with the case or the original case manager can be removed and case access turned over to the new case manager.

To transfer a case, a case manager or a supervisor (that are assigned to the case or are within the supervisor’s supervisory structure) may select “Transfer Case” under “Interview” in the top-level navigation, then the user must enter the Customer ID, Client name, and the name of the user to whom they are transferring the case, then select “Transfer Case.”

### 11. What if I want to add information to the assessment but there is no question that directly addresses it?

In the upper right-hand corner of every page there is a “Notes” button so that the user may add any information that is not directly addressed by a question in the tool, or add any thoughts that are pertinent to the case.

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**12. As a case manager, can I override my clients' answer on an indicator question if I think that they should answer the questions under that tab anyway?**

Yes. If the client says that s/he has no issues with housing, for example, but the case manager knows that the client has moved several times in the past few months, the case manager can override the answer by clicking "Continue" on the right-hand side or clicking the next tab manually. This will bring up the questions under that tab regardless of the answer given by the client.

**13. How do I save my interview?**

Interviews automatically save data every 15 minutes. In addition, when you select "Exit" to leave an interview, the interview will save at that point as well.

**14. What if nothing happens when I try to access the Self-Sufficiency Plan?**

It is possible that your Popup blocker is on. Several sections in OWRA require you to turn off your Popup blocker, so be sure to do that before attempting to use it.

**15. What if I think my client is not telling the truth when they answer a question?**

In the upper right hand corner of every page there is a "Notes" button so that you can add any information that you feel is important that is not directly addressed by a question in the tool, or to add any thoughts that you have that are pertinent to the case.

**16. What if I lose my password and user id?**

Your site administrator will be able to assist you.

**17. I moved from one section to another without saving the information. Will I lose the data?**

As you move from one section to another the system automatically saves your work. The only section that does not save automatically is the "Past Employment" section. When entering past employment, you must save after each entry or your information will be lost. However, if you choose to exit the system at any point, please save your work.

**18. Can I enter in more than eight children?**

No. The system currently allows for you to enter up to a maximum of eight children. The user can, however, use the note feature in such cases.

**19. How long does it take to conduct an assessment?**

Reports from the field indicate that appraisals take an average of 45 to 60 minutes. Sometimes it takes more time, sometimes less. As case managers become more familiar with the tool, they will be able to move faster, asking questions and entering data more seamlessly. In addition, a greater investment in

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time upfront reduces the time needed in the long run because more detailed information is gathered about the client, developing a detailed ASR that reflects strengths, barriers, referrals, and recommendations with regard to moving the client forward.

**20. How are the reports generated and calculated?**

The Report module in OWRA pulls data from the tool in real time to populate the module. The data is pulled from all cases where an SSP has been generated.

**Security Questions**

**21. As some information collected in OWRA can be considered Personally Identifiable Information (PII) or Information in Identifiable Form (IIF), how is this information protected from unauthorized access?**

Each OWRA user/agency staff will be required to login to OWRA with a user ID and password, which provides access only to information entered by that user. Administrator accounts, which provide access to interview information across case managers, will be provided only to staff members that are authorized to review this type of data.

However, procedures to screen users, including administrators, and protect against unauthorized use or distribution of information, outside the system, must be defined and implemented by individual agencies.

Please note that persons responsible for support of the information technology, including system administrators, programmers, and systems analysts are not provided access to unencrypted sensitive information. Information technology staff with direct access to the system are screened and audited to ensure compliance with information protection policies.

**22. How is the information collected by agency staff protected from unauthorized access?**

Each OWRA user/agency staff will be required to login to OWRA with a user ID and password, which provides access only to information entered by that user. Administrator accounts, which provide access to interview information across case managers, should be provided only to staff members that are authorized to review this type of data. However, procedures to screen users, including administrators, and protect against unauthorized use or distribution of information, outside the system, must be defined and implemented by individual agencies. Please note that persons responsible for support of the information technology, including system administrators, programmers, and systems analysts are not provided access to unencrypted sensitive information. Information technology staff with direct access to the system are screened and audited to ensure compliance with information protection policies.

**23. Are the data transmitted via the Internet? Are the data encrypted?**

The OWRA application uses secure HHTP (HTTPS) to encrypt all data between a user's Web browser

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and the OWRA server. This technology is the same as used by banks, government agencies, and others to protect data being transmitted via the Internet. Other than using a compatible browser, there are no additional requirements for this use. The OWRA application does not include a mechanism to submit or retrieve data, except via this secure service. For example standard non-secure HTTP is not permitted.

**24. Are the data protected on the OWRA servers?**

All data which contains personally identifiable information (social security numbers, names, phone numbers, and addresses) or that allows linking sensitive information to an individual is encrypted when stored on the OWRA servers, such that this information cannot be viewed or changed except via the OWRA application and by an authorized user. After a user account is revoked, that user will not be able to login or access the system.

**25. What if I do not want to use PostgreSQL database and a Glassfish server? Can I use OWRA with Oracle or Tomcat, for example?**

OWRA has been tested and successfully deployed on the Windows and Linux operating systems. OWRA is database and server agnostic – if your agency is interested in installing using a configuration not listed, you may still proceed with installing OWRA; however, only limited deployment assistance will be available via the OWRA help desk.

**26. I have more questions about the information technology security used by the OWRA tool. Who can I contact?**

Please contact the OWRA Help Desk at 866-989-6972 or e-mail [OWRA@icfi.com](mailto:OWRA@icfi.com) with any security-related questions.

**27. Is the OWRA system compliant with the Health Insurance Portability and Accountability Act (HIPAA)?**

Many of the elements of HIPAA relate to the use and dissemination of health information regarding individuals. The information technology provider is responsible for ensuring the secure collection, transmission, and storage of information entered into the system. Procedures for use of this information outside of the OWRA system remain with the human services agencies, including taking steps to protect participant privacy. The OWRA system, itself, is used as a tool to collect, store, manipulate, and report on this information only to users with authorized user accounts. All decisions regarding who receives an account, how the information is entered, how the information is disseminated, and what happens to the information once it is retrieved (printed or saved to another medium) is at the purview of the relevant human services agency. Information entered into OWRA or retrieved from OWRA shall be treated with the same standards for privacy protection as any other medium, including hand-written or typed information.

OWRA does not transmit or disseminate information to third parties. Information is protected between

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the user's Web browser, on the OWRA servers, and back to the user's Web browser using the aforementioned procedures.

***28. Do we need to input the recommendations, or does that come automatically with the tool?***

Each organization that uses OWRA must input the Recommendations that are appropriate for them. See the User Guide for Guidance.

***29. What browsers does the Online Work Readiness Assessment tool support?***

OWRA should be used on Chrome, Firefox, or Internet Explorer 9 or above.

***30. How many users can I have at one time?***

The number of users that can simultaneously use OWRA at an organization is dependent on the amount of data that can be transferred by the organization's server at any given time.

***31. Can I import previously collected data into OWRA?***

With the appropriate technical expertise, OWRA is built to be able to link to legacy systems.

***32. Is each participant entered issued a unique identifier?***

Yes, each participant is issued a unique identifier through their case number.

***33. How are user accounts and passwords managed?***

User accounts and passwords are managed at the organizational level, by an onsite administrator.



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