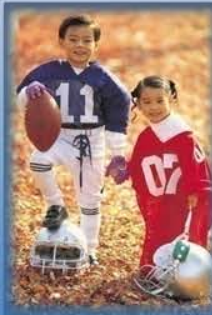
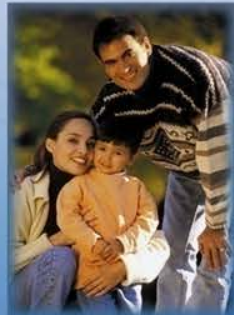




Case Management for Successful Outcomes

Christina Techico

September 25, 2012



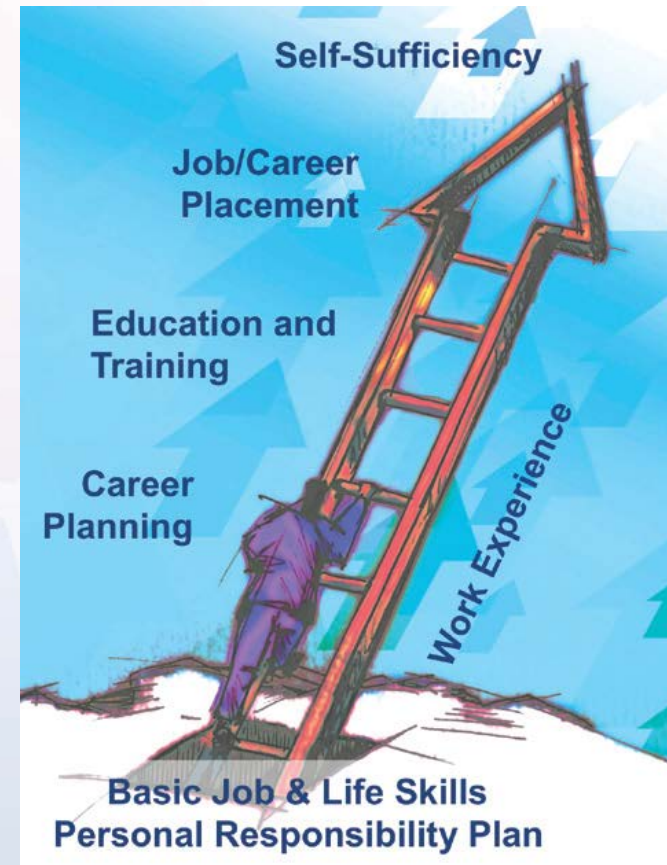
- Setting the Stage:
 - Understanding the Needs of the Field
- Overview of OWRA Application
 - Showcase OWRA
 - Review of OWRA Activities to Date
- Lessons Learned
 - Case Study: South Carolina Analysis
- Downloading OWRA
- Discussion

Setting the Stage- Understanding the Needs of the Field

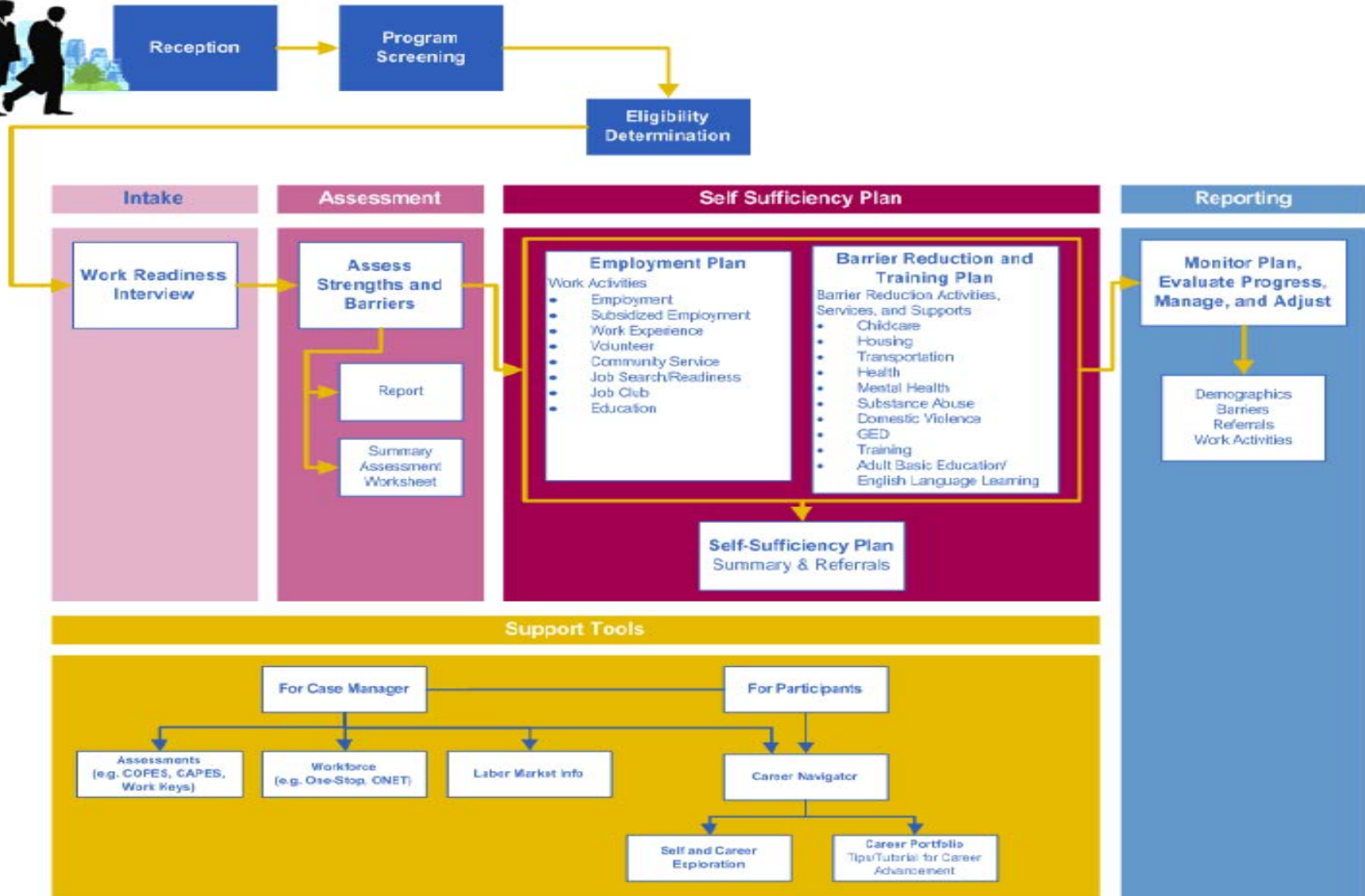
- Innovative and creative strategies sought to proactively adapt the services available to low-income workers to the changing economic structure
- Work readiness assessments, when conducted as part of comprehensive case management strategy, can increase the ability of low income individuals achieve greater employment and accurate assessment
- Need for integrated, automated, client services and tools - ***information technology*** solutions has emerged as fundamental to the operation of human services programs

Online Work Readiness Assessment (OWRA) Overview


- Web-based suite of resources, tools, and assessments that have been merged into a single tool
- 4 Modules (Intake, Barriers and Strength Identification, Self-Sufficiency and Work Readiness Resource, Reporting Module)
- Allows case managers to establish action steps and referrals to work activities and supportive services for program participants



OWRA Modules



Inside OWRA: Demographics



OWRA
Online Work Readiness Assessment

Interviewer: Cheryl Corman
(for: John Doe)

Interview List

- [/ Demographics](#)
- [/ Employment](#)
- [/ Education](#)
- [/ Housing & Transportation](#)
- [/ Health](#)
- [✓ Child Care & Well-being](#)
- [/ Final Thoughts](#)
- Additional Resources

[! General Info](#)
[! Household](#)
[✓ Benefits](#)
Notes

Client did not show for assessment
 Case is Incomplete / Pending

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

* First: <input type="text" value="John"/>	* Last: <input type="text" value="Doe"/>	* Customer ID: <input type="text" value="111111111"/>
* SSN: <input type="text" value="111-11-1111"/>	* DOB: <input type="text" value="1/1/1991"/>	Age: <input type="text" value="20"/> Gender: <input type="radio"/> F <input type="radio"/> M

Multiple-worker household / 2-parent family, please enter customer ID: [Get Info](#)

Race / Ethnicity: Please select **all** categories that apply to the participant. (More than one box can be checked.)

<input type="checkbox"/> American Indian / Alaska Native	<input type="checkbox"/> Asian
<input type="checkbox"/> Black or African American	<input type="checkbox"/> Native Hawaiian or Other Pacific Islander
<input type="checkbox"/> White	<input type="checkbox"/> Some Other Race
<input type="checkbox"/> Hispanic or Latino	<input type="checkbox"/> Non Hispanic or Latino

Residential Address

Street:

City:

State:

Mailing Address

Same as residential

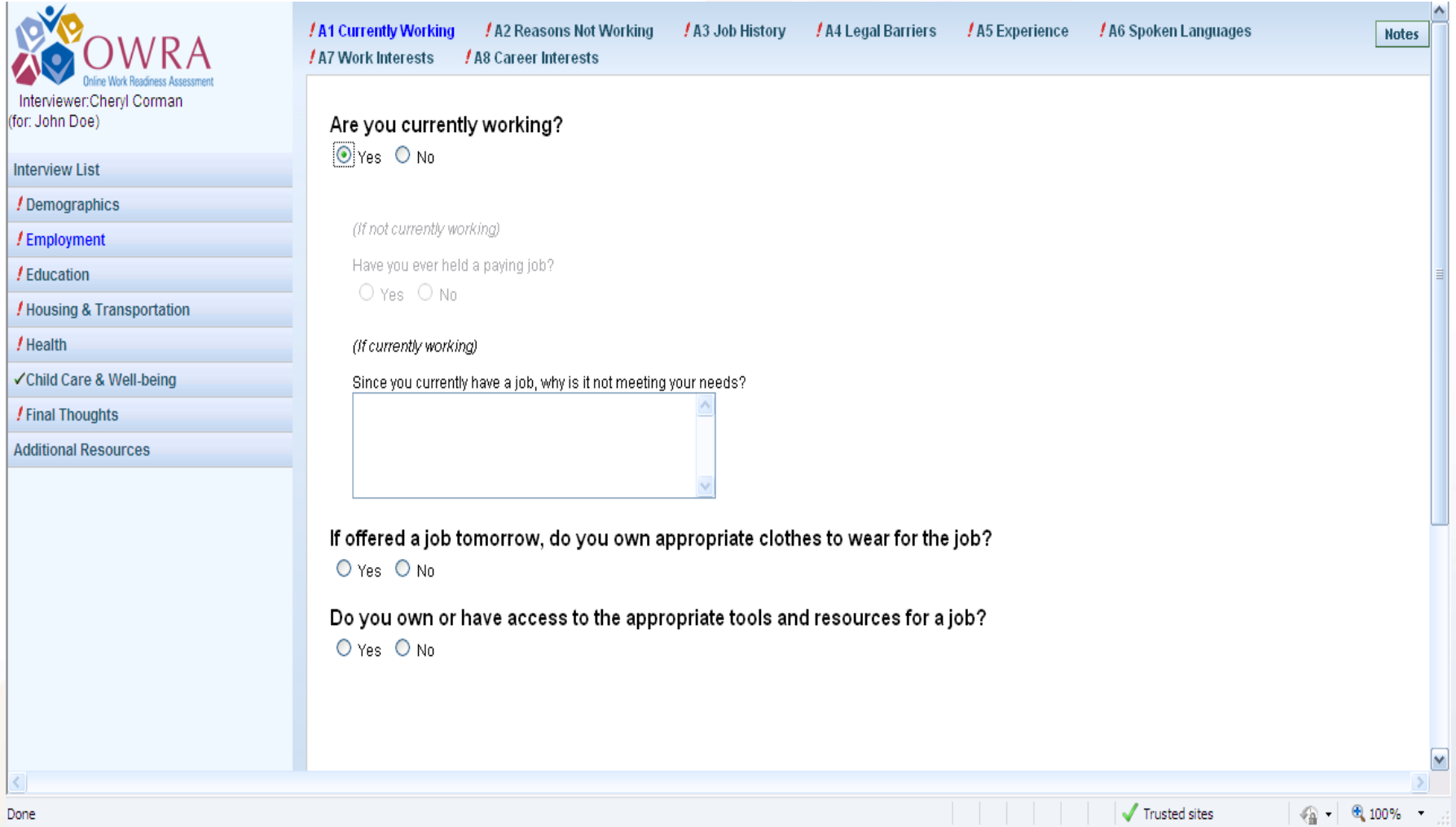
Street:

City:

State:

6

Inside OWRA: Employment



The screenshot shows the OWRA interface for the 'Employment' section. The top navigation bar includes sections A1 through A8, with A1 'Currently Working' highlighted. The left sidebar lists various assessment areas, with 'Employment' selected. The main content area contains the following questions and options:

Are you currently working?
 Yes No

(If not currently working)
Have you ever held a paying job?
 Yes No

(If currently working)
Since you currently have a job, why is it not meeting your needs?


If offered a job tomorrow, do you own appropriate clothes to wear for the job?
 Yes No

Do you own or have access to the appropriate tools and resources for a job?
 Yes No

The interface also features a 'Notes' button in the top right corner and a status bar at the bottom showing 'Done' and 'Trusted sites'.

✓H1 Children Issues
✓H2 Primary Caregiver
✓H3 Parenting
✓H4 Childcare Concerns
✓H5 Childcare Status
✓H6 Backup Childcare Plan

Notes



Interviewer: Cheryl Corman
(for: John Doe)

- Interview List
- / Demographics
- / Employment
- / Education
- / Housing & Transportation
- / Health
- ✓ Child Care & Well-being
- / Final Thoughts
- Additional Resources

What is your current custodial situation?

2-parent custodial
 2-parent other
 1-parent custodial
 1-parent non-custodial

If you are 1-parent custodial, do you have sole custody?

Yes
 No

Does the children's other parent have sole custody?

Yes
 No

Do you currently have an established child support order?

Yes, I receive child support
 Yes, I am paying child support
 Yes, but not received the support yet
 No, there is not a child support order

If not, please explain _____

Do you share responsibility in the care of your children with the children's other parent?

Yes
 No

If yes, is this equally?

Yes
 No

If not, how would you describe the other parent's role in the children's life?

A lot of parents when they are out of work find it very stressful to handle issues with their children. Would you be interested in receiving more information on parenting, attending a parenting class, or joining a support group?

Yes
 No

Do you have access to and regularly use a car seat for your child?

✓ Trusted sites
100%

Example of a Summary Assessment

E.MENTAL HEALTH					
Notes: These are the child care and well-being notes					
Mental Health	Ref	Recommended action	Activity codes	Hours per week	Plan Start
EMOTIONAL HEALTH CHALLENGE	E1	Refer customer to family services or a mental health specialist or resource. If customer has no medical insurance at the time of application, the worker should provide the customer with a purchase authorization and invoice to take to medical doctor. Provide the customer with medical report forms			/ /
		Comments:			
		<ul style="list-style-type: none"> (E1) Score: Verification: 			

G.DOMESTIC VIOLENCE / SAFETY	
Notes: These are the G	
Domestic Violence / Safety	Ref
DOMESTIC VIOLENCE-RELATED CONFLICTS	G1 G2
	Offer a referral to family services, a mental health specialist, or a domestic violence specialist. Request an ex parte against the abuser May offer temporary domestic violence exemption to work participation as appropriate.
Comments:	
<ul style="list-style-type: none"> (G1) a. Afraid about something going on at home (G1) b. Police have been called to house (G1) c. Threatened or physically hurt by another (G1) g. Person is very jealous over customer (G1) h. Person checked up on what customer was doing (G1) i. Avoiding making person angry or upset (G1) o. Customer forced to engage in sexual activities Verification - Monitor progress with written documentation on a regular basis. 	

C.HOUSING & TRANSPORTATION						
Notes: Customer temporarily staying with mother in mother's 2 bedroom apartment. Customer cannot stay permanently. Did not pay parking tickets.						
Housing & Transportation barriers	Ref	Recommended action	Activity codes	Hours per week	Plan Start	Plan End
UNSTABLE HOUSING	C1 C2	Offer a referral to a local housing agency, family preservation, or shelter resources. Offer referrals for rental assistance, payments of back rents, or moving allowances, as appropriate.			/ /	/ /
		Comments:				
		<ul style="list-style-type: none"> (C2) Challenge explanation: cannot stay past august Verification - Documentation of housing searches 				
TRANSPORTATION CHALLENGE	C3 C4 C5 C6	Offer weekly transportation stipend, transit/bus passes or tokens, gas card as appropriate.			/ /	/ /
		Comments:				
		<ul style="list-style-type: none"> (C6) Challenge: bus schedule (C3) Drive my own vehicle Verification - Receipts as appropriate (e.g., gas purchase) 				

Self-Sufficiency Plan-Components



SELF SUFFICIENCY PLAN

Customer Overview [Hide](#)

CUSTOMER
Date of intake: 06/18/2010
Status: Finished
Customer: Betsy Age: 38 Gender: F
ID: Snow 987654

WORK PARTICIPATION
TANF Work Requirements: 20 Hours/Week [Save](#)

Total Hours in Activities:	Core	22 Hours/Week
	Non-Core	0 Hours/Week
	Work Support	0 Hours/Week
	Other	0 Hours/Week

Strengths and Barriers [Hide](#)

EMPLOYMENT STRENGTHS

Previous Jobs (A3):
• Safeway, 02/2004-05/2009

Special Skills (A3):
• customer service

Referrals [Hide](#)

Employment Referrals
• work force ref for job class

Transportation Referrals
• Utilize transit system to attend GED testing at FBC

Education Referrals
• Attend GED Classes

Substance Abuse Referrals
• Refer participant to CDP

Employment Plan [Hide](#)

Employment
Currently working and needs assistance

Depending on how many hours customer is scheduled to work, and if the family is still receiving a partial grant they may need to participate in Work Experience. Customers who have moved from welfare to work could also be eligible for a WAG, depending on when their case closed. Determine if transitional benefits apply (Food Stamps, Medicaid, WIC, Child Care). Explore retraining options. Verification -- paystubs, employer statements, tax records or other acceptable forms of verification. If self-employed -- receipts of earnings/expenses.

Action	Work Type	Hours/Week	Plan Start	Plan End	Actual Start	Actual End	Referral	Status
work force ref for job class	Core	2	8/23/2010	8/30/2010			Yes	In Progress Edit
Offer a referral to employment assistance or other programs to address the working parent's needs such as birth		0					No	In Progress Edit
Action Determine if the individual living with the child meets all the requirements of a specified relative (within the fifth degree of kinship). Possible reduction in required work hours for an average of 20 hours per week. A preschool age child must be immunized to be included in the assistance.		0					No	In Progress Edit

[Add Action Step](#)

Legal Issues

Action	Work Type	Hours/Week	Plan Start	Plan End	Actual Start	Actual End	Referral	Status
No items found								

[Add Action Step](#)

Education

Action	Work Type	Hours/Week	Plan Start	Plan End	Actual Start	Actual End	Referral	Status
Attend GED Classes	Core	8			9/1/2010	11/25/2010	Yes	In Progress Edit
Complete TABE test	Core	2			8/30/2010	8/30/2010	No	In Progress Edit

The SSP contains:

- Customer information
- TANF work participation overview
- Household composition
- Breakdown of non-TANF benefits received
- Snapshot of the customer's strengths and barriers
- Employment plan
- Barrier reduction plan



[For Participants](#)
[For Case Managers](#)

[OWRA Home](#)

For
Participants

For Participants

The **For Participants** section of the Work Readiness Resource is intended to help TANF participants explore and learn about their interests, abilities, and skills. There are three levels of activities, information, and links for TANF participants to explore. In all three levels, TANF participants can take advantage of the **Takeaways**, which are activities and fact sheets for them to use to take down information or learn about themselves.

For Case
Managers

For Case Managers

The **For Case Managers** section is created for Temporary Assistance for Needy Families (TANF) caseworkers, job developers, Job Club instructors, and any other person that works with TANF participants. This section provides an interactive hub of information, resources, and tools so that you can help your TANF participants become self-sufficient.

Case managers will learn about the world of workforce development and labor market information lingo, language, and available resources. In addition to labor market information and workforce development resources available to you, this section also explores education and training opportunities, options, and resources available to help work with TANF participants in putting together a self-sufficiency plan that incorporates the idea of career pathways versus job placement.



[Work Readiness Home](#) -> [For Participants](#)

For Participants

Welcome!

This **Work Readiness Resource For Participants** Section has been created for TANF participants to explore and learn about their interests, abilities, and skills. This section has three levels of activities, information, and links around career exploration for TANF participants to progress on the road towards self-sufficiency. The three sections that progress from initial career exploration to understanding labor market information.

In **Level 1**, TANF participants can get quick tips on building a resume and preparing for job interviews.

In **Level 2**, TANF participants will identify previous education and training and explore and identify interests and skills.

In **Level 3**, TANF participants will explore the world of work by learning about work values and

Level
1


Level
2

Level
3

The **Work Readiness Resource For Case Managers** is created for TANF caseworkers, job developers, Job Club instructors, and any other person that works with TANF participants. This section provides an interactive hub of information, resources, and tools so that you can help your TANF participants become self-sufficient. There are 6 subsections:

1. **For Participants Overview**
 - Explains the For Participant section.
 - Orients you to the 3 levels that your participants will explore as they learn about career exploration.
2. **Key Words and Concepts and Exploring Jobs, Occupations, and Careers Overview**
 - This will give you a brief overview of some important concepts.
3. **Different Work Assessments**
 - Help you gain a better understanding of your participants' abilities, skills, and additional education, literacy, language, and other training that may be needed before initial career exploration can begin.
 - Some assessments are proprietary.
 - Some assessments may need additional fees.
4. **Overview of Career Pathways and Clusters**
5. **Understanding Labor Market Information**
6. **Labor Market Information Resources**
 - Help you understand the world of workforce development and labor market information lingo, language, and available resources.
 - Lets you explore education and training opportunities, options, and available resources.





Interviewer: Guest User

- Interview List
- About
- Change Password
- Versioning
- Reporting
- Logout

Dashboard
Reports
Glossary

Open in PDF

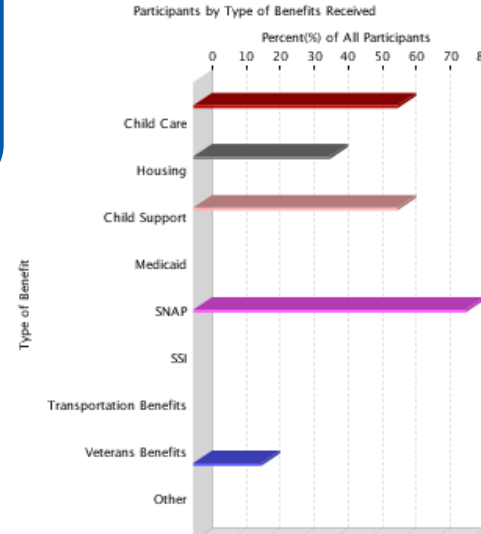
Dashboard: State

Summary as of Sun Jan 09 17:47:00 CST 2011

	Month To Date	Ratio
Number of Assessments	5	100.0%
Number of Participants with Multiple Barriers	0	0.0%
Number of Referrals Made	0	0.0%

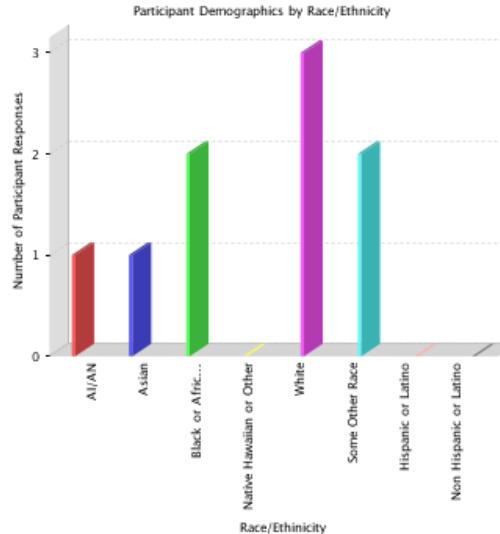
* (The ratio represents the assessments/participants/referrals at your level as a percent of the assessments at the next level of your State's hierarchy. At the State level, the ratio will always be 100 percent.
** All Graphs Represent Month to Date Total.

Participants by Type of Benefits Received



Type of Benefit	Percent(% of All Participants)
Child Care	~55
Housing	~35
Child Support	~55
Medicaid	~55
SNAP	~75
SSI	~55
Transportation Benefits	~55
Veterans Benefits	~10
Other	~55

Participant Demographics by Race/Ethnicity



Race/Ethnicity	Number of Participant Responses
AI/AN	1
Asian	1
Black or Afric...	2
Native Hawaiian or Other	0
White	3
Some Other Race	2
Hispanic or Latino	0
Non Hispanic or Latino	0

Every time source data is updated, the dashboard is also updated.

13

Interview List

About

Change Password

Versioning

Reporting

Logout

Dashboard **Reports**

Reports Selection Criteria for: State

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

* Report Type:

* Report Level:

Date Range: (All dates will show if a date range is not selected)

Start Date:

End Date:

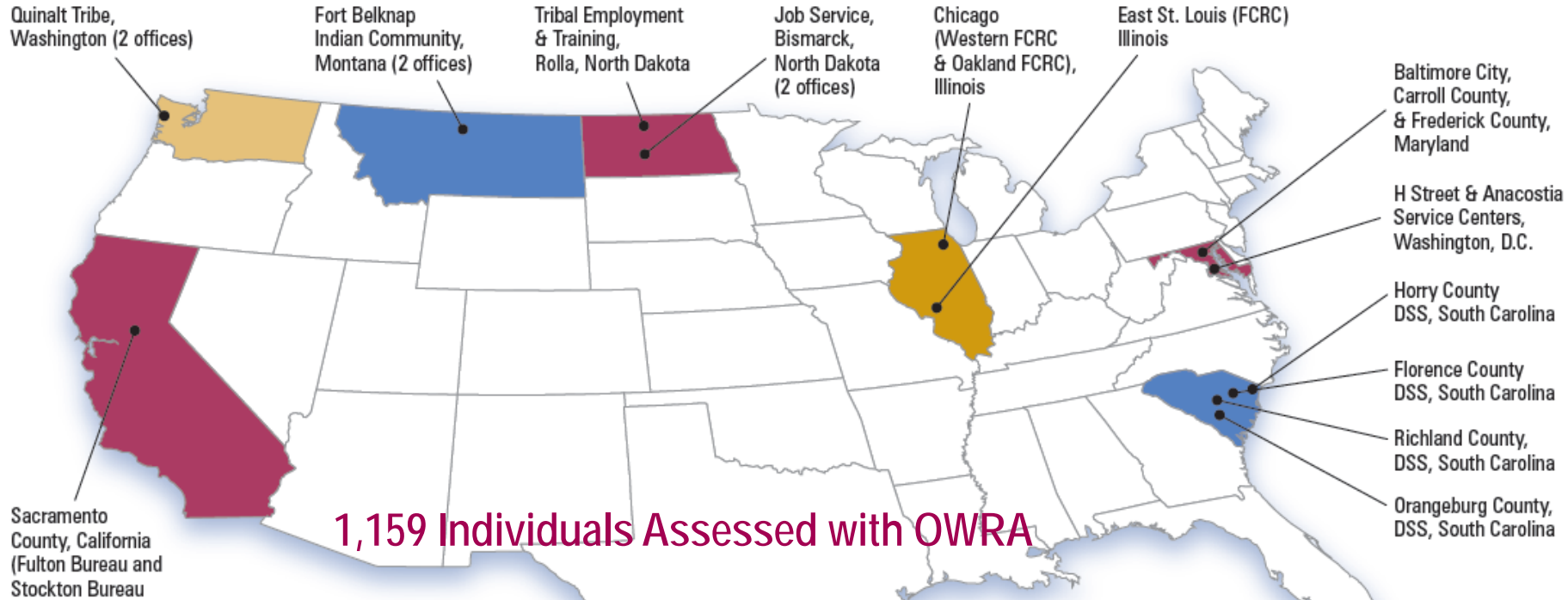
Run Report

OWRA- A Rich History of Field Testing (1997-2008)

- In 2001, OFA funded the development of a computer-assisted statewide client assessment instrument to automate the client screening process and improve consistency across workers and departments
- The initial version of the OWRA tool was piloted by ACF in 2006-2007 in Howard County Maryland
- Convened TANF IT summit in 2008 (40 States, territories, DC, and 17 Tribes) and 2 Focus Groups (Navajo Nation and Quinault participated)
- Need for sophisticated client assessment tool
 - Growing multiple barriers caseload
 - Difficult economic condition
 - Increased pressure to get low income individuals to employment
- Need for consistency and standardizations in identifying clients' barriers

OWRA- A Rich History of Field Testing (2009-2010)

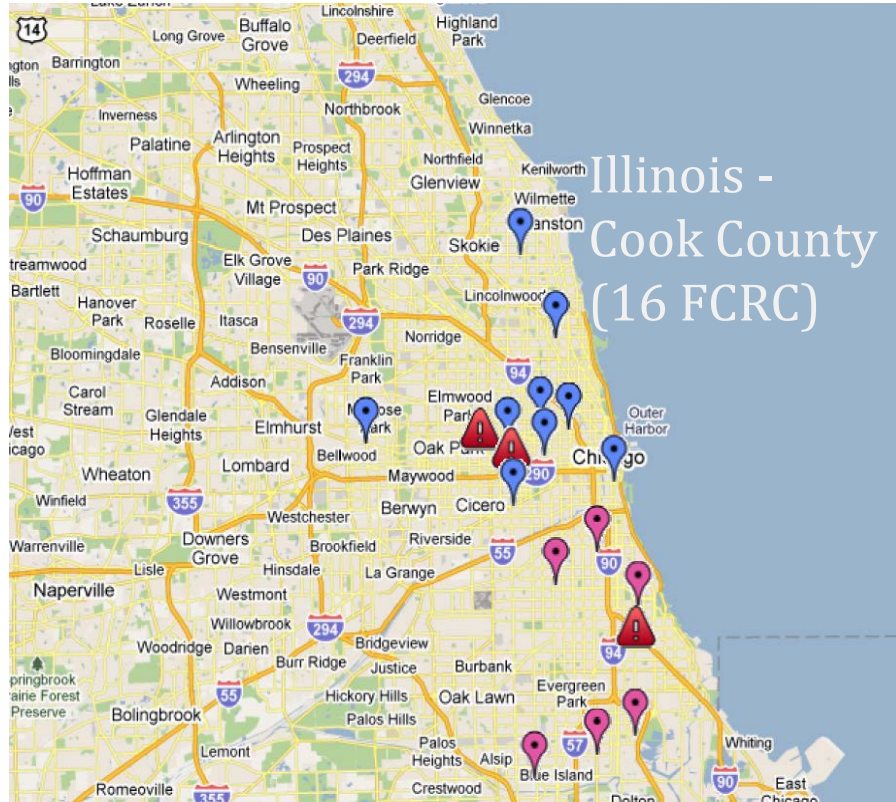
OWRA piloted in 21 localities across 5 States. 2 Tribes. and D.C



OWRA users -a diverse group of professionals including intake workers, case managers, job developers, and social workers

OWRA application expanded to include additional Modules

OWRA Activities - Implementation in Cook County, Illinois and South Carolina (2011)



- Connect OWRA with legacy systems;
- Test OWRA in a Statewide and urban environment
- Provide case managers training on motivational interviewing

8,554 Individuals Assessed with OWRA

Findings from 2011 Implementation

- Planning for Implementation and Stakeholder Buy-in
 - Pre-planning is essential to address issues of infrastructure deficiencies, cultural and language disconnects between the OWRA tool and local site practice, setting realistic benchmarks for implementation and developing a sense of “buy in”.
- Utility of OWRA
 - Front line staff felt that OWRA is a strong tool in identifying TANF participants’ skills, strengths, and barriers, and that it strengthened the referral process.
- Front Line Staff Support Needs
 - To effectively conduct an OWRA assessment, front line staff need: 1) training support, 2) technical support, and 3) conducive office environment (e.g., privacy, 1:1 client interaction without children or other staff interruptions)
 - Training and technical support should continue throughout the implementation process, particularly on technology and professional development topics.
- Client Impact:
 - The positive impacts of OWRA can be strengthened by linking OWRA to resources, agencies, and/or systems that provide support to families, as well as to work verification systems or client engagement systems to create a wraparound effect that engages the client at multiple points of entry.
 - Facilitated conversation with the participant on issues, concerns and barriers that normally would not have been discussed with State assessment forms.

Downloading OWRA

- Access at Welfare Peer Technical Assistance Web site



The screenshot shows the TANFTechConnections website. At the top left, it says "U.S. Department of Health & Human Services Administration for Children & Families". The main header features the "TANFTechConnections" logo with the tagline "Integrated Support—Innovative Solutions" and the "OWRA Online Work Readiness Assessment" logo. A navigation menu includes "Home", "Download the OWRA Tool" (circled in red), "OWRA Resources", and "Contact Us". Below the menu is a search bar with a "Go!" button. A large image of a smiling family is visible. The URL <http://peerta.acf.hhs.gov/tanftc/> is displayed in green. The "Home" section contains text about the website's purpose and an overview of the OWRA Tool, which offers a self-sufficiency plan for TANF participants. It also lists "Modules" and states that OWRA is organized into four related Modules for TANF caseworkers.

U.S. Department of Health & Human Services
Administration for Children & Families

TANFTechConnections
Integrated Support—Innovative Solutions

OWRA
Online Work Readiness Assessment

Home | **Download the OWRA Tool** | OWRA Resources | Contact Us

Search

<http://peerta.acf.hhs.gov/tanftc/>

Home

Funded by the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Family Assistance, the TANF TechConnections Web site serves as a Virtual Kiosk of tools designed to bring together TANF and information technology partners to provide the tools for program management and to support TANF families along the path to self-sufficiency.

Overview: Online Work Readiness Assessment (OWRA) Tool

The Web-based OWRA Tool offers Temporary Assistance for Needy Families (TANF) caseworkers and agencies with services for TANF participants through four modules. The OWRA Tool provides a detailed comprehensive assessment of TANF participants' strengths, barriers, and work readiness. OWRA offers an innovative approach to creating a self-sufficiency plan for TANF participants that summarizes their strengths and barriers, and makes recommendations on placement into work activities and work supports. For more information about the OWRA Tool, please download the [OWRA Fact Sheet](#).

Modules

OWRA is organized into four related Modules that allow TANF caseworkers:

Downloading OWRA: Technical Specifications

- Designed as an open-source application
- However, interested parties responsible for costs incurred for hosting, deploying, and customizing OWRA
- Programming language: Java & Oracle
- Database: MySQL was used for pilots, works with others
- Web server: Glassfish was used for pilots
- No licensing/maintenance agreement required
- No OFA requirement to use OWRA or recommendation on vendor

Considerations While Downloading OWRA

- Audience (language of questions oriented to TANF population)
- Business Process
 - OWRA as a one-time assessment versus case management tool
 - Integration with legacy data systems
 - Users, multiple contacts for one case
 - Number of cases/scalability
 - Departments/sister social service agencies
- Timeframe needed/to be used
- Maintenance

Contact Information

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(email)
1-866-989-OWRA (6972) (phone)