


## CareerSource Heartland

SECTION: <b>Wagner-Peyser</b>	PROCEDURE # G17 PAGE 1 of 14
TITLE: <b>Customer Intake, Initial Assessments and Guided Conversations</b>	EFFECTIVE DATE: 9/9/22
APPROVED BY: 	REPLACES: <b>Front Desk Customer Service, effective 9/13/2012</b>

### **PURPOSE:**

The purpose of this procedure is to provide guidance to staff to ensure consistency in the provision of quality service to all CareerSource Heartland customers.

This procedure focuses on three separate but interrelated sections: the initial intake, assessments, and guided conversations.

### **PROCEDURE:**

All staff members are expected to provide quality services to all customers of CareerSource Heartland. This procedure is a guide to general service delivery for each customer, whether in person or virtual contact is made.

### **INITIAL INTAKE**

- I. During Initial Intake, staff should:
  - a. Make eye contact with customer (if possible)
  - b. Smile
  - c. Acknowledge customer with a verbal greeting (e.g. "Welcome to CareerSource. How may I help you?")
  - d. Ask: "Have you served in the US Military or are you the spouse of someone who has served in the US Military?" (If yes, the Veterans Intake Process should be followed).
- II. As appropriate, for safety purposes, Staff should sign each customer in (name, time, reason for visit, etc.).
- III. Staff should determine the purpose of the customer's visit/contact.
  - a. If the customer has an appointment or a definite purpose, notify the appropriate staff member and/or escort the customer to the applicable

center area.

- b. If a customer cannot articulate their reason for being at or contacting the Career Center, ask questions:
  - i. Does the customer have a letter explaining why they are at the Center?
  - ii. Does the customer wish to see a collocated partner?
  - iii. Is the customer receiving cash assistance, SNAP benefits, or reemployment compensation?
  - iv. Is this the Customer's first visit to the Center?
  - v. Is the Customer seeking employment?
  - vi. Is the Customer attending a hiring or recruitment event?
  - vii. What information is the customer seeking?
- IV. Staff should determine if customer is registered in Employ Florida and if they have an open Wagner Peyser account.
- V. Before a customer can receive career services, they must be activated within Employ Florida, which means a Common Intake must be performed to activate their Wagner Peyser service tracking.
- VI. If customer is already active in Employ Florida, work with the customer to see if you can assist them with the reason they came into the office (i.e., job referrals, workshop, hiring event, etc.), making sure to create the appropriate activity/service code and case note once the task has been completed.
- VII. If the customer is registered in Employ Florida but not active, customer can update their account or staff can assist the customer by inputting the updated data on behalf of the customer and then complete a Common Intake.
- VIII. If the customer is not registered in Employ Florida, staff should help the customer create an account and ensure the Common Intake information is complete.
- IX. It is important that the following sections be updated/completed within Employ Florida:
  - a. **General Information sections:**
    - i. Assigned LWIA: Staff will ensure that the Assigned LWIA states CareerSource Heartland and that the assigned office is correct and that the Registration Office link is also correct.
    - ii. Email Address: Staff will make sure that customer has a valid working email address. If customer does not have an email address, staff will assist customer in creating one.
    - iii. Residential Address
    - iv. Mailing Address, if different from residential address
    - v. Phone Numbers

- vi. Preferred Notification Method.
- vii. Site Access
- viii. Demographic Information
- ix. Citizenship
- x. Disability
- xi. Education Information
- xii. Employment Information
- xiii. Farmworker Information
- xiv. Job Title
- xv. Job Occupation
- xvi. Ethnic Origin
- xvii. Race
- xviii. Language
- xix. Spouse or Caregiver of a Military Member
- xx. Military Service

**b. Background sections:**

- i. Education History
- ii. Occupational Licenses, Certificates and Training
- iii. Employment History (for at least the last 10 years). Verify that Occupation title and ONet codes are correct.
- iv. Desired Job Type
- v. Desired Work Location(s)
- vi. Desired Salary
- vii. Driver's License Information
- viii. Languages & Proficiency
- ix. Security Clearance
- x. Typing Speed

**Note: *Updating Information within the Common Intake will not automatically update the information on the General Information or Background pages.***

**INITIAL ASSESSMENT/ASSESSMENT PROCEDURE:**

**Initial Assessment:**

An Initial Assessment provides information to accurately assess an individual's job history, education, interests, vocational skills, aptitudes, and gaps that result in the identification of employment goals, barriers to employment, and services needed to obtain employment and training goals.

Initial Assessments can also include completion and review of applications, standardized testing, and interviews, and assessment of skill levels including literacy, numeracy, and English language proficiency. Documentation of assessment results should include what services and support services may be desired, needed or appropriate for the individual. As needed, this information may be used to develop an employment and/or training plan

(sometimes called Individual Employment Plan, Individual Service Strategy, Alternative Service Plan, Employability Plan). An assessment should include sufficient details for other staff to be able to follow.

- I. Veterans with no identified significant barrier to employment (SBE), Reemployment Services and Eligibility Assessment (RESEA) participants, and Migrant and Seasonal Farmworkers (MSFW) will always need to have an Initial Assessment upon activation when they come in to seek services.

***Please refer to Veterans Intake Process G-14, effective 08/05/2019 when serving Veterans and eligible spouses.***

- II. Initial Assessments are a crucial and required component in several other programs, such as: SNAP, WT, TAA, and WIOA and can be performed by all staff, as assigned, or as agreed upon.

### **Conducting the Initial Assessment**

- III. Staff may conduct the initial assessment via a face-to-face interview, virtually, or via telephone.

- IV. Throughout the conversation with customer as staff gathers the information for the General Information, Background and Common Intake pages within Employ Florida, staff should also gather valuable information to determine the best way to guide the customer toward their employment/education goal(s), such as:

- CSH Orientation
- Education
- Work History
- Skills Sets
- Strengths
- Interests
- Barriers/Limitations
- LMI Provided
- Service Recommended
- Work Values
- Barriers to employment
  - Are they able to overcome their barriers or do they need assistance?
  - Ascertaining if reasonable accommodations are needed
  - Are there any services or partner agencies that can assist an individual in achieving their goal?

The assessment interview should be recorded as an Initial Assessment Code 102 in Employ Florida.

## **Assessment and Related Activity Codes**

Codes that may be used with the Initial Assessment include:

- 101 – Orientation, Staff Assisted
- 102 – Initial Assessment
- 107 – Provision of Labor Market Information
- 114 – Staff-Assisted Job Search
- 115 – Resume Preparation Assistance
- 174 – Referral to Supportive Services – Other (Non-Federal/State)
- 210 – Referral to Education Services
- 211 – Referred to WIOA

**Note: *This list is not all-inclusive. Be sure to record the codes and include case notes for all activities/services provided.***

## **TEMPLATES FOR DOCUMENTING INITIAL ASSESSMENTS**

Specific programs may require additional information to be discussed and documented during the initial assessment process. To ensure that all required information is recorded in the assessment case note for each program, the following templates are provided.

**Note: *Staff should be made aware that while the below categories must be included in an assessment, more information can be added to the template or put in the 'Other' section.***

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**Initial Assessment Template:**

Orientation to CareerSource Heartland career center services was completed on \_\_\_\_\_, 2022. Provided customer with information regarding the job search and referral process and informed customer of workshops available to assist with job readiness and resume creation. Customer reviewed the CSH Orientation presentation for summary criteria and requirements for program participation and receipt of services.

Initial Assessment was conducted with participant on \_\_\_\_

Education: Customer states that

Work History: Customer states

Skills Sets: Customer states that

Strengths: Customer states that

Interests: Customer states

Barriers/Limitations: Customer states

Provided LMI data:

Support Service: Referred Customer to

Other:

Services Recommended:

**This section intentionally left blank. Proceed to the next page.**

**MSFW Assessment:**

Orientation to CareerSource Heartland career center services was completed on \_\_\_\_\_, 2022. Provided customer with information regarding the job search and referral process and informed customer of workshops available to assist with job readiness and resume creation. Customer reviewed the CSH Orientation presentation for summary criteria and requirements for program participation and receipt of services. Initial Assessment was conducted with participant on -----

511 N Issued and Explained on -----Explained Complaint System and farmworkers' rights, and services available through Center including the availability of referrals to agricultural job orders and non-agricultural job orders, and training opportunities.

Crop Code:

Education: Customer states

Work History: Customer states

Type of Work Preferred: Customer states

Previous Training Received: Customer states

Interested: Customer is

Skills sets: Customer states

Strengths: Customer states

Barriers/Limitations: Customer states

Provided LMI data:

Support Service: (EF Code will vary- check the code guide to ensure proper code is used and to identify required case note criteria).

Other:

Recommendations: Recommended

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## RESEA Orientation/ Assessment Case Note

**Orientation:** Orientation to CareerSource Heartland career center services was completed on (Date) \_\_\_\_\_. Provided customer with an overview of the benefits to reemployment services and programs and services available in the career center including information regarding the job search and referral process and workshops available to assist with job readiness and resume creation. Customer reviewed the CSH Orientation presentation for summary criteria and requirements for program participation and receipt of services.

Initial Assessment was conducted with participant on (Date)

**Education:**

**Work History:**

**Skills Sets:**

**Strengths:**

**Interests:**

**Barriers/Limitations:**

**Provided LMI data:**

**Support Service:** (EF Code will vary-check the code guide to ensure proper code is used and to identify required case note criteria).

**Other:**

**Services Recommended:**

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## **GUIDED CONVERSATION**

### **Guided Conversation:**

A guided conversation is a brief overview of an individual's work history, education, and interests that will assist Staff in helping Customers successfully gain employment by addressing goals and barriers to employment, and providing quick services needed to obtain gainful employment by focusing on assisting the individual with a specific goal (i.e. attending a workshop, job searching, receiving job referrals, preparing a resume, attending a hiring/recruitment event, etc.).

- I. Once Staff has determined that an initial assessment is not required, Staff should have a guided conversation with Customer to determine what the Customer is hoping to achieve during their visit.
- II. If customer is already active in Employ Florida, staff will work with the customer to see if they can assist them with the reason they came into the office (i.e., job referrals, workshop, hiring event, etc.), making sure to create the appropriate activity/service code and case note once the task has been completed.
- III. If the customer is registered in Employ Florida but not active, customer can update their account or staff can assist the customer by inputting the updated data on behalf of the customer and then create a Common Intake.
- IV. If the customer is not registered in Employ Florida, staff should help the customer create an account and ensure the Common Intake information is complete.
- V. It is important that the following sections be completed within Employ Florida:
  - a. **General Information sections:**
    - i. Assigned LWIA: Staff will ensure that the Assigned LWIA states CareerSource Heartland and that the assigned office is correct and that the Registration Office link is also correct.
    - ii. Email Address: Staff will make sure that customer has a valid working email address. If customer does not have an email address, staff will assist customer in creating one.
    - iii. Residential Address
    - iv. Mailing Address, if different from residential address
    - v. Phone Numbers
    - vi. Preferred Notification Method.
    - vii. Site Access
    - viii. Demographic Information
    - ix. Citizenship
    - x. Disability
    - xi. Education Information
    - xii. Employment Information

- xiii. Farmworker Information
- xiv. Job Title
- xv. Job Occupation
- xvi. Ethnic Origin
- xvii. Race
- xviii. Language
- xix. Spouse or Caregiver of a Military Member
- xx. Military Service

**b. Background sections:**

- i. Education History
- ii. Occupational Licenses, Certificates and Training
- iii. Employment History (for at least the last 10 years). Verify that Occupation title and ONet codes are correct.
- iv. Desired Job Type
- v. Desired Work Location(s)
- vi. Desired Salary
- vii. Driver's License Information
- viii. Languages & Proficiency
- ix. Security Clearance
- x. Typing Speed

VI. Once these two pages have been completed and/or updated, Staff will conduct a Common Intake for customer.

**Note: *Updating Information within the Common Intake will not automatically update the information on the General Information or Background pages.***

VII. Below are some examples of services that might require a guided conversation:

- a. Customer needs to work on a resume
  - i. Staff will work one on one with Customer to create a resume.
  - ii. Staff will upload newly created resume to Employ Florida
  - iii. Staff will give customer paper copies of their resume and email both a Word version and a pdf version to customer
  - iv. Once completed, staff will enter a 115-activity code, then enter a *Consent* and *Resume Assistance* case notes, as well as a case note documenting what was discussed.
- b. Customer needs to job search or apply for a job
  - i. Staff will job search with the customer and/or assist customer with applying for the position.
  - ii. Staff will enter a 114-activity code, then enter a *Consent*, a *Staff Assisted Job Search* case note, as well as a case note documenting what was discussed.

- c. Customer wants to attend a workshop
  - i. Once customer is activated in Employ Florida, they can attend a workshop
  - ii. Staff would put in the appropriate activity code for the workshop in question (104, 115, 153, 155, or 156) and add a *Consent* case note and the appropriate workshop case note, as well as a case note documenting what was discussed.
- d. Customer attends a hiring/recruitment event
  - i. Using the hiring event registration form, staff would complete the common intake
  - ii. Staff would then enter the appropriate activity code (112 or 119) and a *Consent* case note, a referral case note, if applicable, a *Job Fair/Recruitment Event* case note, as well as a case note documenting what was discussed.
- e. Customer needs to apply for reemployment benefits through the Department of Economic Opportunity.
  - i. If Customer is registering for reemployment benefits, remind Customer that part of the requirements for obtaining reemployment benefits is that they must:
    - a. Be registered with Employ Florida, or, if already registered, ensure their information is up to date.
    - b. Have a current resume in Employ Florida (either system generated or uploaded).

**Note: This may be a good time to demonstrate how to job search within Employ Florida.**

## **VII. Customer Intake Template**

Please note that sections can be added or deleted based on the needs of the customer. Be sure to clearly delineate the services provided.

**Customer came into (or contacted) CareerSource Heartland on [DATE]. Provided customer with information regarding the job search and referral process and informed customer of workshops available to assist with job readiness and resume creation.**

**Barriers:**

**Needed Accommodations, if any:**

**Salary Requirements:**

How much do they need to make to pay their bills/survive?

**Are they interested in Training?**

If so, what?

**Other:**

What was learned during conversation with Customer?

**Actions Taken:**

What was done with Customer?

A sample scenario:

A man comes into the Center on 06/01/2022, looking for a heavy equipment position. During conversation, staff discovers that he does not have a high school education and he does not have reliable transportation. To pay his bills, Customer states he needs to make at least \$20/hour. Staff assisted the man with creating a resume and referred him to two different jobs orders.

Five case notes entered into the system would be:

1. Consent
2. Staff Assisted Job Search/Referral
3. Resume Assistance
4. Referral to Support Services - Other
5. A Customer Intake case note with information that will help staff members in the future assist this customer.

*Customer came into CareerSource Heartland on 06/01/2022. Provided customer with information regarding the job search and referral process and informed customer of workshops available to assist with job readiness and resume creation. Customer stated that he came into the Center to seek a heavy equipment operator position.*

**Barriers:** *Customer stated that he does not have a high school education and that he cannot work outside of Highlands County. While he has transportation, he does not believe it to be dependable.*

**Needed Accommodations:** *None (Section could be deleted)*

**Salary requirements:** *\$20/hour*

**Are they interested in training:** *Not at this time.*

**Other:** Customer states that if he cannot find a heavy equipment operator position that he would consider working in another industry, such as production.

In addition, Customer was referred to Commute Connector for their Emergency Ride Home Program as well as referred to Indian River State College for their GED program.

**Actions taken:** Two referrals were given, and a resume was created. Since Customer is open to working in a different profession, discussed the possibility of taking a Career Scope Assessment to see what areas of employment the customer might like to pursue. Also, demonstrated how to use the job search feature within Employ Florida

Activity codes used in the above scenario:

- 114 - Staff Assisted Job Search
- 115 - Resume Preparation
- 174 - Referral to Support Services – Other (Non-Federal/State)
- 210 - Referral to Educational Services

**Note:** *In all cases, career center staff must ensure they have obtained the job seeker's permission to update information in the state system. Customer's verbal consent should be documented in a case note.*

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## **ACTIVATING CUSTOMER PARTICIPATION:**

To ensure a customer's registration is open and active, staff must provide and document a service/activity code that activates participation:

- 104 - Job Search Workshop**
- 112 - Job Fair**
- 113 - Job Search Plan**
- 114 - Staff-Assisted Job Search**
- 115 - Resume Preparation Assistance**
- 116 - Received Service from Staff Not Classified**
- 119 - Recruitment Event**
- 125 - Job Search/Placement Assistance/Career Counseling**
- 153 - Basic Computer Workshop**
- 155 - Interviewing Skills Workshop**
- 156 - Soft Skills Workshop**

This procedure incorporates the following attachments:

- 020-G17-1a Registration Form
- 020-G17-1a Registration Form Spanish
- 020-G17-1b Hiring Event Registration Form
- 020-G17-1c Workshop Event Registration Form
- 020-G17-1d MSFW Desk Aid