



Policies and Procedures

SECTION: Operations	POLICY #: OPS 28	PAGE 1 of 19
TITLE: Wagner-Peyser Employ Florida Registration, Applications, Services and Case Notes	EFFECTIVE DATE: 11.22.21	
SUPERSEDES: N/A		DATED: N/A

I. PURPOSE

The purpose of this policy is to provide staff with the minimum requirements for Wagner Peyser Employ Florida registrations, applications, services, and case notes.

II. APPLICATION

This policy applies to all staff or any other personnel involved in job seeker services in the career centers.

III. POLICY

CareerSource Florida Administrative Policy 096 - Wagner-Peyser Job Seeker Registration, Application and Services, states that a job seeker who uses self-service may be registered in Employ Florida, but registration is not required. Job seekers may self-register or CSNCFL staff may register the job seeker. Prior to registering, career center staff **must** first check to see if the job seeker is already registered in Employ Florida. If the job seeker is not already registered, career center staff **must ensure they have obtained the job seeker's permission verbally prior to creating a new registration.** A case note **must** be included on the job seeker's Employ Florida account stating the job seeker granted staff permission to create the account. For job seekers to receive staff-assisted services, CSNCFL staff **must** create a Wagner-Peyser application in Employ Florida. Job seekers receiving Wagner-Peyser funded, staff-assisted services **must** have a full registration in Employ Florida. The purpose of providing staff-assisted services is to enhance the job seeker's ability to become employed. Staff **must** not record a service on a job seeker's activity history/service plan unless the service was provided with the job seeker's knowledge. Wagner-Peyser funded services must be recorded in Employ Florida in accordance with the Employ Florida Service Code Guide. Career center staff must record services provided to job seekers within 15 days of the date the service was provided. Staff is **required** to enter a case note in the jobseeker's Employ Florida account every time they enter a staff-assisted service.

IV. DEFINITIONS

Employ Florida – is the web-based, state management information system that records, tracks, and reports employment services and activities provided to job seekers and employers. This system is also used to provide case management of customers and recording of services provided by center staff.

Employ Florida Registration – The entering and submission of personal information in Employ Florida in order to create an account. Staff must have the jobseeker's permission to create a new Employ Florida account. Additionally, there **must** be a case note in the jobseeker's Employ Florida account documenting the permission to create the new account.

- **Partial Registration** – A registration that includes the elements necessary to establish a record and basic demographic data, but missing Occupational Information Network (O*NET) code, background wizard, or resume has not been completed.
- **Full Registration** – A registration where all elements of a partial registration have been completed and the jobseeker has been assigned an O*NET code, completed the background wizard, or entered a resume on their personal profile, to include additional essential employment-related information, such as licenses or certifications, that will enhance the placement of the jobseeker.

Facilitated Self-Help Services or Informational Services – Program services or activities that provide readily available information that do not require an assessment by a staff member of the job seeker's skills, education, or career objectives, nor significant staff involvement. These services do not trigger or extend program participation.

Individualized Career/Staff-Assisted Services – Program services provided that require significant staff involvement and customization to an individual job seeker (e.g., specialized assessments, developing an Individual Employment Plan, career counseling, etc.). Individualized Career/Staff-Assisted Services trigger and extend program participation.

Job Seeker - a person that is registered in Employ Florida and looking for employment.

Participant - A reportable individual who has received reportable services or activities that triggers program participation.

Program Exit – It is when the job seeker has not received a service for at least 90 consecutive days from any partner program in which the job seeker is co-enrolled that triggers or extends participation, and does not have a future service scheduled that triggers or extends participation. In this instance, the job seeker is referred to as having “soft exited” the program. If the job seeker is co-enrolled in the Trade Adjustment Assistance (TAA) or Workforce Innovation and Opportunity Act (WIOA) programs, the participant will not exit until he/she has not received a service that triggers or extends participation for any co-enrolled program for 90 consecutive days. The job seeker's exit can be entered manually if the job seeker meets the global exclusion criteria, referred to as a “Hard Exit,” outlined in TEGl 10-16, Attachment II.

Pseudo Social Security Numbers (SSN) - A fictitious Social Security Number (SSN) created for the sole purposes of registering job seekers in Employ Florida when they request not to use their SSN or when a duplicate registration exists. Pseudo SSNs cannot be created by a job seeker. Job seekers who are registered in Employ Florida with a pseudo SSN are not counted in the federal performance measures due to the inability to match the job seeker with wage records that confirm his/her employment status.

Reportable Individual - A jobseeker who uses the self-service system only in Employ Florida or receives information-only services or activities. Reportable individuals will have a WP application that indicates "Registration Only" and does not include a participation date.

V. PROCEDURE

A. Employ Florida Registration	
Responsibility	Action
Universal Job Seeker	Self-registers or needs the Wagner-Peyser (WP) Placement staff's assistance with creating a new Employ Florida account.
CSNCFL Staff	<ol style="list-style-type: none"> Conducts a search of the job seeker in Employ Florida by first and last name, and last four of their social security number, to ensure no other Employ Florida registration exists. <ol style="list-style-type: none"> If the job seeker does not have an Employ Florida account, or the account needs to be updated, aids with creating/updating their Employ Florida account. Note: The job seeker must provide consent to create a new Employ Florida account. Documents in the job seeker's Employ Florida account their verbal consent via a case note. If the jobseeker has an Employ Florida account, reviews and makes any necessary updates. Ensures the job seeker is fully registered in Employ Florida by completing all elements of a partial registration, assigning an O*NET code, completing the background wizard, <u>or</u> entering a resume on their personal profile, to include additional essential employment-related information, such as licenses or certifications, that will enhance the placement of the jobseeker.

A. Employ Florida Registration (cont.)	
Responsibility	Action
CSNCFL Staff	<ol style="list-style-type: none"> 3. Completes the Wagner-Peyser Application in Employ Florida by ensuring the multi-step wizard progress bar is complete. <ol style="list-style-type: none"> a. When assisting a job seeker in Employ Florida with a closed Wagner-Peyser Application, a job seeker that has previously exited the Wagner-Peyser program, a Wagner-Peyser re enrollment prompt will automatically generate. b. To bypass the WP re-enrollment, click “Do not enroll.” The system will bypass creation of a Wagner-Peyser enrollment and participation record, and will not update participation information for the job seeker. c. To complete the transaction, click “Enroll Now.” The system will create a new Wagner-Peyser enrollment and participation record with the selected Initial Service activity completed. d. To re-enroll the individual in the Wagner-Peyser program (for the benefit of reporting WP services provided to the job seeker), complete the “Participation Information” section to include an initial service activity from the list box.
CSNCFL Supervisor	<ol style="list-style-type: none"> 1. On the last day of every month, pulls the “Staff Employ Florida Registrations” list to ensure that the staff member who created the Employ Florida account entered a detailed case note with the job seeker’s permission. 2. If there are any Wagner-Peyser program findings, alerts staff to make the correction to the job seeker’s Employ Florida account and provides coaching to prevent the error from reoccurring. 3. Sends the WP staff the outcomes of the report on the first of every month.
WP / VETS / TAA Staff	Reviews the “Staff Employ Florida Registrations” report and notifies the appropriate Supervisor to any discrepancies within their program.

B. Services Provided to Job Seekers & Case Noting	
Responsibility	Action
Universal Job Seeker	Needs individualized career services that require significant staff time and customization to assist with finding employment.
CSNCFL Staff	<ol style="list-style-type: none"> 1. Conducts a search of the job seeker in Employ Florida by first and last name, and last four of their social security number. 2. Reviews job seeker's Employ Florida account to determine if the account is a full or partial Employ Florida registration. <ol style="list-style-type: none"> a. If the jobseeker is partially registered, contacts the jobseeker by their preferred method of communication recorded in Employ Florida, and informs the jobseeker to complete their registration prior to providing any staff assisted services. Records contact attempts in Employ Florida with a detailed case note. <p>Note: Staff is <u>not</u> allowed to provide staff-assisted services to a jobseeker who is <u>not</u> fully registered.</p> 3. If the jobseeker is fully registered in Employ Florida, ensures that the job seeker's Employ Florida account is up-to-date with all necessary information. 4. Provides the jobseeker with individualized career services, according to the WP Employ Florida Service Code Guide, needed to enhance the job seeker's ability to become employed. 5. Case notes all individualized career services provided in the job seeker's Employ Florida account. <ol style="list-style-type: none"> a. Ensures case notes include who, what, where, why, when, and how information, along with the next step and the date for a return appointment, if applicable. b. Ensures case notes are in accordance with this policy and the WP Employ Florida Service Code Guide. c. When entering case notes in Employ Florida, staff should not include personal/medical issues, such as substance.

D. Pseudo Social Security Numbers (SSN)	
Responsibility	Action
Universal Job Seeker	Attempts to register in Employ Florida and requests not to use their SSN.
CSNCFL Staff	<ol style="list-style-type: none"> 1. Conducts a search of the job seeker in Employ Florida by first and last name, and last four of their social security number, to ensure no other Employ Florida registration exists. <ol style="list-style-type: none"> a. If the job seeker does not have an Employ Florida account, aids with creating their Employ Florida account with a pseudo SSN. The job seeker must provide consent to create a new Employ Florida account. b. To create a pseudo SSN in Employ Florida, staff must enter the SSN as follows: <ol style="list-style-type: none"> i. Enter "9" as the first digit. ii. Enter the last two digits of the job seeker's birth year as the next two digits. iii. Enter "00" as the two middle digits. iv. Enter the month and date of birth sequentially as the last four digits. <p>1. Example: Date of Birth: February 6, 1977 Pseudo-SSN: 977 00 0206</p> v. If the pseudo SSN is already being utilized, a unique number may be created by altering the middle two digits sequentially from "00" until an unassigned number is found. 2. Ensures the job seeker is fully registered in Employ Florida by completing all elements of a partial registration, assigning an O*NET code, completing the background wizard, <u>or</u> entering a resume on their personal profile, to include additional essential employment-related information, such as licenses or certifications, that will enhance the placement of the jobseeker. 3. Completes the Wagner-Peyser Application in Employ Florida by ensuring the multi-step wizard progress bar is complete. 4. Documents the job seekers verbal consent to create the account and the reason a pseudo SSN was used via a case note in the job seeker's Employ Florida account.

E. Correcting Social Security Number Errors in Employ Florida

Responsibility	Action
Universal Job Seeker	Attempts to register in Employ Florida and reports that his/her SSN is already in use by another individual.
CSNCFL Staff	<ol style="list-style-type: none">1. Conducts a search of the job seeker in Employ Florida by first and last name, and last four of their social security number, and identifies a duplicate Employ Florida account for the job seeker.2. Requests the job seeker produce an original social security card or certified copy, if the original is unobtainable, and matches it with appropriate picture identification.<ol style="list-style-type: none">a. Every effort must be made to review original documentation. b. If the job seeker is unable to provide the required documentation, notifies a Supervisor via email of the job seeker's inability to verify their identity and provides the username, state ID and last four digits of the duplicate Employ Florida account.3. If required documentation is provided, reviews the documentation provided by the job seeker to confirm ownership of the SSN. Once the SSN is confirmed, the job seeker must be allowed to register under the correct SSN.4. If the job seeker does not have an Employ Florida account, requests permission from the jobseeker to create a new Employ Florida account under the correct SSN.5. Creates the Employ Florida account and documents via a case note the job seeker's verbal consent and the type(s) of documentation used to verify the job seeker identity.6. Reviews the duplicate Employ Florida account for activities or staff assisted services that have been documented in the account during the most recent four quarters.<ol style="list-style-type: none">a. If activities have been recorded on the Employ Florida account, determines whether the job seeker using the incorrect SSN resides in a different local area, and if so, notifies a Supervisor via email and provides the username, state ID of the duplicate Employ Florida account.

E. Correcting Social Security Number Errors in Employ Florida (cont.)

Responsibility	Action
CSNCFL Staff	<ul style="list-style-type: none">b. If the job seeker is in the local area, makes a total of 3 contacts attempts, to correct the Employ Florida account error, using varying contact methods (e.g., phone, email, or post mail, etc.) and documents all attempts in Employ Florida using a detailed case note.c. Requests the job seeker provide appropriate documentation of their correct SSN. If the job seeker refuses, or is not able, to provide the correct documentation, a pseudo SSN must be issued and a detailed case note must be entered into the Employ Florida file.d. If the job seeker cannot be contacted, the incorrect SSN must be changed to a pseudo number using the date of birth provided on the account and a case note entered into Employ Florida documenting the action.e. If no activity has been documented for the job seeker in the most recent four quarters, a case note must be recorded to document the SSN error and a pseudo SSN must be created and assigned.
WP Staff	<ul style="list-style-type: none">1. If WP staff is unable to verify the job seeker's identity due to the job seeker being unable to produce original state or federal identification, the WP staff is permitted to use verifiable third-party resources to verify the true owner of the SSN in the absence of such documentation. Third-party resources include the use of the CONNECT system.2. If there are activities recorded on the job seeker's Employ Florida account with an incorrect SSN in the most recent four quarters, and the job seeker resides in another location, attempts to make contact with the LWBD in the area that the job seeker resides and explains the SSN error.<ul style="list-style-type: none">a. If the LWDB cannot be contacted or no action is taken within ten (10) business days, the incorrect SSN must be changed to a pseudo number using the date of birth provided on the account and a case note entered into Employ Florida documenting the action until such time as the correct SSN is provided and confirmed.

D. Duplicate Employ Florida Registrations	
Responsibility	Action
Universal Job Seeker	Needs individualized career services that requires significant staff time and customization to assist with finding employment.
WP Placement Staff	<ol style="list-style-type: none"> 1. Conducts a search of the job seeker in Employ Florida by first and last name, and last four of their social security number, and identifies a duplicate Employ Florida account for the job seeker. 2. Verifies that the duplicate registrations are the same job seeker by ensuring the name, gender and date of birth are the same in both accounts. 3. Requests the job seeker produce an original social security card or certified copy, if the original is unobtainable, and matches it with the appropriate picture identification. <ol style="list-style-type: none"> a. If the job seeker does not provide a social security card, requests the job seeker to provide original documentation issued by a state or federal governmental entity that documents the SSN and matches it with the appropriate picture identification. b. If the job seeker is unable to produce the original documentation, requests the job seeker to provide a certified copy. Every effort must be made to review original documentation. c. If the job seeker is unable to provide the required documentation, notifies a Supervisor via email of the job seeker's inability to verify their identity and provides the username, state ID and last four digits of the inaccurate Employ Florida account. 4. If required documentation is provided, reviews the documentation provided by the job seeker to confirm ownership of the duplicate Employ Florida accounts. 5. Documents via case note in both Employ Florida accounts the name and position of the staff member requesting the accounts to be merged, which account is the correct account by username and state ID, the type of documentation used to verify the job seeker's identity and why the accounts need to be merged. <ol style="list-style-type: none"> a. Example: WP staff named _____, requesting that Employ Florida account 1) username XXXX, state ID 11111 and 2) username YYYYY, state ID 222222 need to be merged into correct account username XXXX state ID 11111. Correct account was verified by reviewing Mr. Smith's SSN and Photo ID. 6. Notifies the Supervisor via email of the duplicate Employ Florida accounts and provides the usernames, state IDs and last four digits of the job seeker's SSN.

D. Duplicate Employ Florida Registrations (cont.)

Responsibility	Action
CSNCFL Staff	<ol style="list-style-type: none">1. If the WP staff is unable to verify the job seeker's identity due to the job seeker being unable to produce original state or federal identification, the WP staff is permitted to use verifiable third-party resources to verify the true owner of the SSN in the absence of such documentation. Third-party resources include the use of the CONNECT system.2. If the identity of the job seeker has been verified, conducts a second review of both Employ Florida accounts to verify the duplicate accounts are the same job seeker by ensuring the name, gender and date of birth are the same and that the WP Placement Specialist entered the appropriate case notes on both accounts.3. Informs the Regional Security Officer (RSO) with the usernames, state IDs and last four digits of the SSN for the two accounts that need to be merged.
RSO	<ol style="list-style-type: none">1. Conducts a third review of both Employ Florida accounts to verify the duplicate accounts are the same job seeker by ensuring the name, gender and date of birth are the same and that the WP or CSNCFL staff entered the appropriate case notes on both accounts.2. Enters a ticket into the Online Project Communication (OPC) system requesting the accounts be merged.<ol style="list-style-type: none">a. The language for the request must state: "Please merge username XXXX, state ID 11111 and username YYYYY, state ID 222222 into correct account username XXXX state ID 11111, where this is the account to remain."3. Verifies the account has been merged and advises the requesting staff member that the accounts have been merged.

E. Wagner-Peyser Participant Hard Exit

Responsibility	Action
WP or CSNCFL Staff	<ol style="list-style-type: none"> 1. Notified that a job seeker meets one of the following global exclusions: <ol style="list-style-type: none"> a. Becoming incarcerated in a correctional institution or becoming a resident of an institution or facility providing 24- hour support. b. Receiving medical treatment that is expected to last longer than 90 days and precludes entry into unsubsidized employment or continued participation in the program. c. Deceased. d. Serving as a member of the National Guard or other reserve military unit of the armed forces and being called to active duty for at least 90 days. 2. Documents the notification in the job seeker's Employ Florida account and enters a detailed case note. 3. Ensures that all information in the job seeker's Employ Florida account is accurate and updated with all required information. 4. Notifies the WP Supervisor via email of the Employ Florida account and provides the username, state ID and last four digits of the job seeker's SSN that may qualify for a global exclusion.
Supervisor	<ol style="list-style-type: none"> 1. Conducts a second review of the job seeker's Employ Florida account to ensure the WP Placement staff has entered a detailed case note justifying the global exclusion. 2. If the global exclusion is justified, informs the WP/VETS/TAA Supervisor via email of the Employ Florida account and provides the username, state ID and last four digits of the job seeker's SSN.
WP/VETS/TAA Staff	<ol style="list-style-type: none"> 1. Reviews the Employ Florida account and verifies that the job seeker meets the global exclusion requirements outlined in TEGl 10-16, Attachment II. 2. If the account does qualify for a global exclusion, creates an exit using the Employ Florida exit wizard in the job seeker's current Wagner Peyser Application under the program's tab. 3. Enters a detailed case note stating the reason for the hard exit. <ol style="list-style-type: none"> a. Example: Mr. Smith notified CSNCFL staff, via phone on 1/4/2021 that he is unable to return to work in the next 90 days due to a medical condition. <p><i>*Note- Hard Exit approvals are conducted on a case-by-case basis.</i></p>

VI. EXCEPTIONS

Exceptions to this policy, or any part thereof, must be approved by the Chief Executive Officer

VII. REFERENCES

[Training and Employment Guidance Letter \(TEGL\) Number 10-16, Change 1](#)

CareerSource Florida Administrative Policy 096 - Wagner-Peyser Job Seeker Registration, Application and Services
Wagner-Peyser Employ Florida Service Code Guide

[Manage Individuals Chapter of the Virtual One-Stop User Guide](#) TEGL 10-16

VIII. EXHIBITS

Wagner-Peyser Example Case Notes

Wagner-Peyser Example Case Notes

Employ Florida Case Note Samples	
WP Employ Florida Service Code Guide Standard	Sample
<p>Hires & Placements (Service Codes 750 & 880): List the job seeker's name, employer/company name, date of verification, certification the service is not a duplicate of a previously documented placement, referral date (750 only) start date, wage, and the name and title of the verification source. Please see reference labeled "Proper Processing and Documentation of Obtained Employment and Placements." *Note: To claim a Placement (750 Code), the Job Order description /O*NET code must match the position hired for; otherwise, an obtained employment (880 Code) must be taken in lieu of the Placement.</p>	<p>On x/xx/xxxx, verified via phone with Gwen Smith, Human Resources Director, that Inigo Montoya is employed with Williamson Corp. Ms. Smith stated that Mr. Montoya started work on 2/8/21 and is making \$18.00/hr. I certify that this activity is not a duplication of a previously documented placement. (750 only: Customer was referred to job order # 123456789 on 2/5/21.)</p>
WP Employ Florida Service Code Guide Standard	Sample
<p>Received Service From Staff Not Classified (Service Code 116): Document the service provided and result of the service, as well as any specific actions that are required of the jobseeker.</p>	<p>Customer came in today for an employment referral. Staff allowed the customer to tell their story, dreams and goals, work history and skills, and perceived obstacles to employment. When asked about her job search status, she stated that she was fired from her job last month and has not been able to buy food. We discussed how this must be a difficult time for her and her family. She was reminded of her past resiliency and her determination to obtain her goal of employment. We discussed the resource options she has available to provide for her family during these rough times. She stated that she could go to a food bank, but did not know which one to contact. Permission was requested and granted to contact the Food Kitchen. We spoke with _____ who said to send the customer right over. Customer was provided the program information. I thanked the customer for her time and reminded her of her appointment with _____ at the Food Kitchen. I congratulated her for her persistence in finding gainful employment and informed her that her next appointment at CSNCFL at _____, at 10:00 a.m.</p>

Employ Florida Case Note Samples (cont.)

WP Employ Florida Service Code Guide Standard	Sample
<p>Job Development (Service Code 123): The case note must include the employer's name, phone number, address, date of contact, and position/title of job staff is seeking for the customer.</p>	<p>Employer: Lead Staffing – Bradford County Point of Contact/Title: Mr. Doe/Project Manager Date of Contact: 1/15/2021 Employer Phone Number: (954) 555-1234 Employer Address: _____ Résumé Referral Date: 1/22/2021 Job Seeker's Position of Interest:</p> <p>U.S. Army Veteran, Bobby Flay, is currently working with DVOP Jones at the Starke career center. DVOP Jones conducted a comprehensive assessment, review of military / prior work experience, education, certifications, aptitude, strengths, occupational skills, and employment interests. The Veteran expressed interest in obtaining employment as a General Laborer. Based on the information gathered, DVOP Jones referred the Veteran to LVER Barnes as another resource in assisting the veteran in obtaining employment.</p> <p>LVER Barnes personally reviewed the Veteran's credentials, along with his interest in obtaining employment as a General Laborer. LVER Barnes immediately contacted Mr. John Doe, Project Manager for Lead Staffing, as he has been working directly with the LVER to fill open positions with Veteran-preferred candidates. Mr. Doe advised LVER Barnes that he did have two (2) openings for general laborers that were not posted on Employ Florida and requested that the Veteran's résumé be sent to him via email.</p> <p>LVER Barnes reviewed Employ Florida to confirm that the positions were not currently being advertised on the website, and the veteran's résumé was forwarded to Mr. Doe as requested. LVER Barnes advised Mr. Doe that he would follow up with the Veteran directly. LVER Barnes will follow up with the employer in one week to check the status of this Job Development.</p>

Wagner-Peyser Example Case Notes

Employ Florida Case Note Samples (cont.)	
WP Employ Florida Service Code Guide Standard	Sample

<p>Veteran Initial Assessment (IA) (Service Code 102): The case note must record results of the assessment, including the date of the IA, an evaluation of a jobseeker's specific Significant Barriers to Employment (SBE), skill levels, such as literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), supportive service needs and the outcome of the referral to the Veteran Program.</p>	<p>Veteran's SBE(s): Low income, lacks high school diploma Desired Job Title: Maintenance Technician Highest Education Level Achieved: 9th Grade Abilities: 15 years' experience Master Maintenance Skills Gap(s): High school diploma Referred to DVOP: Yes</p> <p>WP staff met with veteran, Brian Maguire, and asked how we can assist him. Staff allowed the customer to tell their story, dreams and goals, work history and skills, and perceived obstacles to employment. The veteran needed job search assistance and was having difficulty finding employment due to lack of high school diploma. Initial Assessment completed on 01/30/21. Veteran self-attested to Significant Barriers Employments (SBEs) of low income, due to having a family of four earning less than \$4,000 over the last six months and lack of high school diploma.</p> <p>Veteran stated that he has over 15 years of experience in Master Maintenance and Landscaping. Veteran last worked for John Maintenance Company and was with the company for 10 years and was unable to find employment due to lack of a high school diploma. Veteran has been unemployed for two (2) months and has available transportation.</p> <p>Staff informed veteran that there was a program available through the Florida Department of Education for veterans to assist with obtaining a high school diploma. The veteran expressed interest and was given information on how to obtain a high school diploma. He was given information regarding Veterans Priority of Service and about the various workshops available at the center, including the WIOA program. When asked about his résumé, the veteran stated that he has an up-to-date résumé but does not have it saved online and did not bring a hard copy. Requested veteran forward his résumé to me so that I can upload it in Employ Florida to better assist him with his job search. Virtual Recruiter was set up to alert him of possible maintenance positions when his résumé posted. He was also given a workshop calendar. Veteran was referred to DVOP Jones.</p>
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Wagner-Peyser Example Case Notes

Employ Florida Case Note Samples(cont.)	
WP Employ Florida Service Code Guide Standard	Sample
<p>Objective Assessment (Service Code 203): The case note must include the specific testing used and a summary of the results, interview and employment/education history, evaluation results, barriers and strengths, and supportive service needs. The assessment in Employ Florida or a locally developed format may be used.</p>	<p>The veteran was initially assessed and referred by Placement Specialist Lockhart on 12/8/2020 and referred to a DVOP for further services. During the Initial Objective Assessment, the DVOP allowed the Veteran to discuss her dreams, goals, work history, skills, and perceived obstacles to employment. The veteran served in the United States Air Force as an active duty Supply Specialist. During the assessment, the DVOP identified challenges to employment, aptitudes, strengths, skills, employment interests, supportive services needed, referrals, and overall employability. The veteran attested to having the following SBEs: Low Income – the veterans attested to making \$0.00 in the last six months – family of 1 and Pending Disability Claim – the veteran attested to having a pending claim from the Department of Veterans Affairs. The veteran's previous employment was with Second Chance Society and was recently displaced in April 2020 due to the COVID-19 pandemic. The veteran attested to needing assistance with how to conduct proper job searches, assistance with interviewing tactics and building an employment action plan. The veteran stated to have a current certification of Excel, Bloomberg Concept Marker, along with a Bachelor's Science in Accounting. Additionally, the veteran demonstrated and voiced to have willingness to learn, is bilingual, and tech-savvy. The veteran also confirmed to have suitable interview attire, a valid driver's license, and reliable transportation. The veteran is interested in the following positions and has a salary expectation of \$20.00 per hour: Financial Analyst and/or Accountant. The DVOP explained the importance of developing a chronological/functional résumé. The DVOP provided the veteran with résumé advice and electronic templates of both a functional résumé and a combination résumé for her reference. The veteran did not require, nor request, any referrals to other agencies at this time. The DVOP will reassess when necessary. After completing her assessment, the veteran confirmed that she understood the information given and is ready to commence her job-searching efforts, following specific steps jointly created by both parties (DVOP and the veteran).</p>

Wagner-Peyser Example Case Notes

Employ Florida Case Note Samples (cont.)	
WP Employ Florida Service Code Guide Standard	Sample
<p>Individual Counseling (Service Code 200): The case note must state what services were provided, outcomes, and steps to be taken going forward (e.g., additional assessments, workshops, etc.), along with a timeline and dates.</p>	<p>During a scheduled face-to-face meeting, the Case Manager and the customer discussed various employment leads that matched the veteran's overall employment goals. These leads were directly acquired from Employ Florida. These included: Lead Salesforce Administrator, Shipping Clerk, and Bartender.</p> <p>Plan developed: A plan was developed with the customer to thoroughly look over the various job descriptions while simultaneously revising new tailored résumés (e.g., chronological, functional, and combination) to positions of interest. Résumé templates were provided to the customer. The customer was encouraged to send the revisions to the Success Coach and upload the documents into Employ Florida.</p> <p>Steps needed to be taken to reach the goal: The customer will make the changes to his résumé as agreed and encouraged to complete the following tasks:</p> <ol style="list-style-type: none"> 1. Thoroughly review job descriptions provided. 2. Revise current résumé to the positions of interest. 3. Share with the case manager for pre submission review. <p>Approximate timeline: The Case Manager and the customer mutually agreed to meet again to further discuss the actions and progress within the next week. The expectation is that the customer will have multiple revised résumés for the Success Coach to review. The Success Coach will, in turn, ensure the résumé is completed and ready for submission.</p>

Wagner-Peyser Example Case Notes

Employ Florida Case Note Samples (cont.)	
Employ Florida Service Code Guide Standard	Sample
Résumé Preparation Assistance (Service Code 115): When staff provides instruction on the content and format of résumés, and provides assistance in the development and production of résumés and cover letters.	<p>Ms. Sweet called CSNCFL for a job referral to job order numbers 11385319 and 11394177. Staff person Herma reviewed Ms. Sweet's résumé and explained the necessity of the résumé being a professional representation of skills, experience and education. The résumé was spell checked, reviewed for grammatical errors and proper formatting. The following changes were made to the résumé: updated address and phone number, added latest work history, and updated the skills section of the résumé to match the position in which she was applying. The updated résumé has been uploaded in Employ Florida and sent to Ms. Sweet by email.</p>
CSNCFL Case Note	Sample
Authorization to Refer to Job Orders: The case note must include the job order number the job seeker is being referred, contact method, and the job seeker granting permission to be referred to the job order.	<p>While conducting a candidate search for Service Technician III, Job Order #1333401, Case manager Terry reviewed Mr. Jon Doe's résumé in Employ Florida to ensure that he met all requirements of the Job Order. Placement Specialist Terry called Mr. Doe to inform him of the job opportunity, discussed all requirements of the job and requested permission to refer him to the job. Mr. Doe agreed and was referred to Job Order #1333401.</p>

OFFICIAL SIGNATURE

PHYLLIS MARTY
Chief Executive Officer