

Policies and Procedures

SECTION: Operations	POLICY #: OPS 29	PAGE 1 of 18			
TITLE: Wagner-Peyser Job Referral Services	EFFECTIVE DATE: 11.22.21				
SUPERSEDES: N/A	DATED: N/A				

I. PURPOSE

This policy shall establish a guideline for processing pending referrals and job referrals to job orders in Employ Florida.

II. APPLICATIONS

This policy applies to all staff providing or assisting with jobseeker services in the CSNCFL one-stop centers.

III. POLICY

Staff shall properly screen all jobseekers against the job order prior to making any job referrals. Additionally, staff is to only provide staff assisted services to jobseekers who are **fully registered in Employ Florida**. Staff shall obtain the jobseeker's consent prior to making a job referral by using the Authorization to Refer Form attached to this policy, **or** by entering a detailed case note on the jobseeker's Employ Florida account documenting the jobseeker's verbal consent for each job referral provided by one-stop staff.

IV. DEFINITIONS

<u>Attempted Contacts</u> – This occurs when a staff member has tried to reach the jobseeker via email, phone, or text. Staff is to document all contact attempts by entering a case note in the jobseeker's Employ Florida Account.

<u>Employ Florida Registration</u> – The entering and submission of personal information in Employ Florida in order to create an account.

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Staff **must** have the jobseeker's permission to create a new Employ Florida account and their consent to create the new account **must** be documented in a case note in the jobseeker's Employ Florida account.

- Partial Registration A registration that includes the elements necessary to establish a record and basic demographic data, but is missing an Occupational Information Network (O*NET) code, background wizard, or resume.
- Full Registration A registration where all elements 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.

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

Option 1 Job Order: A job order in Employ Florida that does not require pre screening of jobseekers prior to referral. Jobseekers can self-refer to the job order.

<u>Option 2 Job Order</u>: A job order in Employ Florida that requires staff to prescreen all jobseeker applicants prior to issuing a referral. Jobseekers can view the job order but cannot apply without staff assistance.

<u>Participant</u>: A reportable individual who has received reportable services or activities that triggers program participation.

<u>Pending Referral List</u> - A report pulled from Employ Florida that lists jobseekers who have requested a job referral from a job order that requires prescreening in Employ Florida.

Reportable Individual: A jobseeker who uses only the self-service system in Employ Florida or receives information-only services or activities.

V. PROCEDURE

Pursuant to CareerSource Florida Administrative Policy 099, Wagner-Peyser Job Orders and Placements, when a jobseeker applies for a position in Employ Florida, it is called a self referral. If the jobseeker applies to a job order to which the employer requires candidate screening, a message appears in Employ Florida informing the jobseeker that a staff member will contact them within 72 hours. A list of these jobseekers appears on the 'Manage Labor Exchange' section of Employ Florida under "Referrals Pending Review." Wagner-Peyser Supervisors or their designee are required to view this daily to ensure the referrals pending are handled within the allotted time period Pending referrals do not require jobseeker permission to refer them to a job order. Staff must enter a detailed case note in the jobseeker's Employ Florida account stating the referral was approved due to meeting the minimum qualifications of the job order and was the result of a pending referral.

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All fully registered jobseeker candidates under the Wagner-Peyser Program will be provided proper referrals, where appropriate, according to the procedure outlined below.

	A. Pending Referrals
Responsibility	Action
WP Staff or designee	 Pulls the Pending Referral Report daily from Employ Florida. All referrals must be processed within 48-hours two (2 business days). Sorts the report by placing the oldest pending referral at the top of the list. Saves the list to a common drive on our network with the following address: https://drive.google.com/drive/folders/17uf8IRBTobKxfjL5lCwWFuNST0iZpjiuu Ensures the Pending Referral List is divided equally among WP Placement Specialists if we have more than one person in that position
WP Staff	 Pulls their assigned Pending Referral List daily. Reviews and works oldest Pending Referrals first. Within Employ Florida, follows procedure set forth in the Pending Referral Technical Guide (Attached). Reviews the jobseeker's Employ Florida account to determine if the account is a full or partial Employ Florida registration. If the jobseeker is partially registered, contacts the jobseeker by their preferred method of communication recorded in Employ Florida, and informs the jobseeker of the need to complete their Employ Florida registration before any staff assisted services can be received. Records contact attempts in Employ Florida with a detailed case note. If the jobseeker is fully registered in Employ Florida, properly screens by comparing the jobseeker's résumé to the requirements listed in the job order, by reviewing the jobseeker's skills, abilities, prior work experience, education, and training certifications/ licensure against the requirements of the job order. When reviewing the Pending Referral List, if the Résumé action is clicked and a message pops up stating there is no résumé on file, reviews the job seeker's Employ Florida account for an active résumé before denying the referral. If the referral is denied due to an inactive résumé, contacts the jobseeker to advise of status/reason for the denial.

A. Pending Referrals (cont.)
Responsibility	Action
	7. If the jobseeker is not a 100% match to the job order requirements, denies the referral by entering a case note in Employ Florida and sends the appropriate message to the customer in Employ Florida's Message Center explaining the denial per the Pending Referral TechnicalGuide.
	8. If the jobseeker is a 100% match to the job order requirements, is fully registered in Employ Florida, and the résumé meets the job order description, follows the steps in the Pending Referral Technical Guide for referring qualified candidates, emails the résumé to the employer, issues the referral, and enters a case note in Employ Florida, according to Policy # 571.
WP Placement Specialist	a. Pending referrals can be approved without the jobseeker's consent or permission. A detailed case note must be entered on the jobseeker's Employ Florida account to document that the job referral was a result of an approved pending referral.
	9. If the jobseeker is a 100% match to the job order requirements, but the résumé does not meet standards set forth by Quality Assurance (QA), the referral will be denied by entering a case note. The QA requirements are:
	 Résumé(s) referred had 3 or fewer total spelling errors. Résumé(s) referred was void of any nonsensical sentences that are confusing, particularly to the perspective of an employer. Résumé(s) and Employ Florida profile referred had a contact phone number with an area code. Résumé(s) and Employ Florida profile referred had an appropriate email address (e.g., psychokiller18@yahoo.com would not be acceptable and should not be referred). 10. If there has been no response from the jobseeker, following two (2) attempts over a 48-hour period, the Pending Referral may be denied to

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B. Job Referrals	
Responsibility	Action
CSNCFL Staff	 Reviews jobseeker's Employ Florida account to determine if the account is a full or partial Employ Florida registration. 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. Once the jobseeker is fully registered in Employ Florida, ensure the jobseeker has a current Authorization to Refer Form in their Employ Florida account. a. If there is not an Authorization to Refer Form on file, staff may
	receive the job seeker's verbal consent to refer to a specific job order. Staff must enter a case note documenting the jobseeker provided verbal consent to be referred. i. The customer must be Informed that he/she will receive the Authorization to Refer Form via email to assist in receiving future job referrals. ii. Sends Authorization to Refer Form to jobseekers electronically or through the email iii. The completed Authorization to Refer Forms will be uploaded into the jobseeker's Employ Florida account
	in the 'Documents' (Staff) tab. iv. The uploaded Authorization to Refer Form must be identified in the jobseeker's Employ Florida account by adding the Document Tag "Authorization to Refer."
	b. If there is an Authorization to Refer Form on file, proceed to #4.
	 Properly screens by comparing the jobseeker's resume to the requirements listed in the job order, including their skills, abilities, prior work experience, education, and training certifications/licensure.
	5. If the jobseeker is a 100% match to the job order requirements and the resume matches the job order requirements, emails the resume to the employer, enters the appropriate activity code in Employ Florida and attaches a case note to the activity.

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C. Job Referral	s (cont.)
Responsibility	Action
	If the jobseeker is a 100% match to the job order requirements, but the resume does not match the jobseeker will be advised to correct/edit the resume.
	7. If further information is required to determine if the jobseeker is a 100% match to the job order requirements, attempts to contact the jobseeker. If the contact attempt is made with the jobseeker, documents the details of the contact in a case note in Employ Florida.
	If the jobseeker is not a 100% match to the job order requirements, the staff will not issue the referral and enters a case note detailing the denial.
	9. If the jobseeker is fully registered in Employ Florida, properly screened by comparing the jobseeker's resume to the requirements listed in the job order, by reviewing the jobseeker's skills, abilities, prior work experience, education, and training certifications/licensure against the requirements of the job order.
	10.If the jobseeker is a 100% match to the job order requirements and the resume meets standards set forth by the Quality Assurance (QA) Department, emails the resume to the employer, enters the appropriate activity code in Employ Florida according to the Employ Florida Service Code Guide, and attaches a case note to the activity.
	11.If the jobseeker is a 100% match to the job order requirements, but the resume does not meet standards set forth by QA, the jobseeker will be advised to correct/edit the resume.
	12.If further information is required to determine if the jobseeker is a 100% match to the job order staff shall attempt to contact the jobseeker. If the contact attempt is made with the jobseeker, it should be documented in Employ Florida with a case note.
	13.If the jobseeker is not a 100% match to the job order requirements, the staff will not issue the referral and shall enter a case note detailing the denial.

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C. Referral Results	5
Responsibility	Action
CSNCFL Staff	 If the referral does not result in the jobseeker being hired, no further actions are required. If the referral does result in the jobseeker being hired, staff: Enter the appropriate placement activity code (750) and attach a case note on the jobseeker's Employ Florida account. Go into the job order for which the referral is made and enter the same case note that was attached to the placement activity code entered on the customer's Employ Florida account. The case note subject will be the word "Hired" followed by the customer's first and last name. Example: Hired – James Kirk. Update the status of the job referral to "Hired," along with the job start date, and enters the above mentioned case note in the case note section. Uses the 750/880 Verification Checklist on a daily basis when entering a 750 or 880 activity on a jobseeker's Employ Florida account. Provide the 750/880 Verification Checklist to the assigned Supervisor
CSNCFL Supervisor	every Friday for review. Every Monday, reviews the 750/880 Verification Checklist to ensure the information is captured appropriately in Employ Florida.

VI. EXCEPTIONS

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

VII. REFERENCES

CareerSource Florida Administrative Policy 099, WP Job Orders and Placements DEO Wagner-Peyser Programmatic Review Tool Employ Florida Service Code Guide TEGL 10-16 Change 1

VIII. EXHIBITS

Authorization to Refer Form 750/880 Verification Checklist Pending Referral Technical Guide

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Authorization to Refer Form

Date:
1. l,
(Print First and Last Name)
2. Last 4 numbers of my Social Security Number:
3. Authorize CSNCFL to refer me to Employ Florida job orders for the purpose of
assisting me with finding employment.
4. This authorization will be effective immediately and will be ongoing to provide me with assistance in my job search and employment goals.
5. I can cancel consent at any time by notifying CSNCFL in writing directed to: Phyllis
Marty, CSNCFL CEO, 1112 North Main Street, Gainesville FL 32601,
pmarty@careersourcecsncfl.com
Signature: Date:

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DATE:			

Staff: Prior to saving the activity and associated case note, this checklist should be completed to ensure all required elements of the case note have been included. Please fill in the Customer's State ID, Name, and the activity code you entered into Employ Florida. For all other columns, place an X in the box indicating you are verifying these items are in the case note attached to the activity. Note: The case note entered for the a 750 activity on the jobseeker's Employ Florida profile should be identical to the case note entered on the job order when updating the status of a referral for the jobseeker to "Hired".

Supervisor: At the end of each day, review the activities listed to ensure the attached case note contains all of the required elements for that activity.

State ID	Customer Name	Activity Code	Job Seeker's Name	Employer/ Company Name	Name/Title of verification source	Date of verification	Certify the service is not a duplicate of a previously documented Placement / Obtain	Referral Date (750 Only)	Job Start Date		Verified Data Accuracy prior to submittal	Sup. Reviewed Employ Florida (Y/N)	Comments
12345678	Job Seeker	750	x	x	x	x	x	x	x	x	x	Y	N/A

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Technical Guide:

Working the Pending Referral List

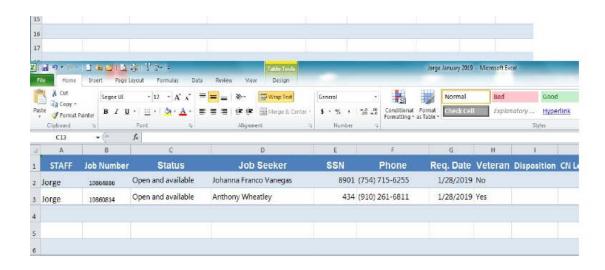
The following instructions are intended to provide technical guidance in processing requests for referrals on Option 2 suppressed job orders in Employ Florida, or working the "Pending Referral List." Determining candidate eligibility or qualification for a specific job is not covered in this guide. Wagner-Peyser Placement Staff should follow these instructions for accessing, screening, and dispositioning the customers on the list who have requested a referral to an Option 2 suppressed job order.

These instructions will provide technical guidance on the following:

- Accessing the Pending Referral Assignment list
- Accessing and Navigating the Pending Referral List in Employ Florida
- .Determining Eligibility for Referral
- Referral of Qualified Candidates
- Denial of Unqualified Candidates
- Action Steps When a Resume Is Not Attached
- · Disposition, Documentation, and Case Noting

Accessing the Pending Referral Assignment list

- 1. Open the spreadsheet from the folder located at:https://drive.google.com/drive/folders/17uf8IRBTobKxfjL5ICwWFuNST0iZpjiu
- 2. Select the date to process.
- 3. Verify the pending referral listed is not a duplicate request to process.



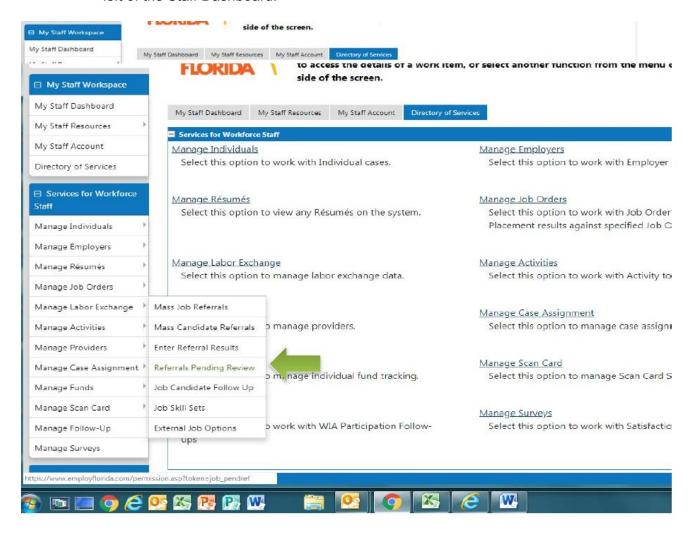


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Accessing and Navigating the Pending Referral List in Employ Florida

1. Log into Employ Florida and select "Manage Labor Exchange" from the Menu Bar on the left of the Staff Dashboard.

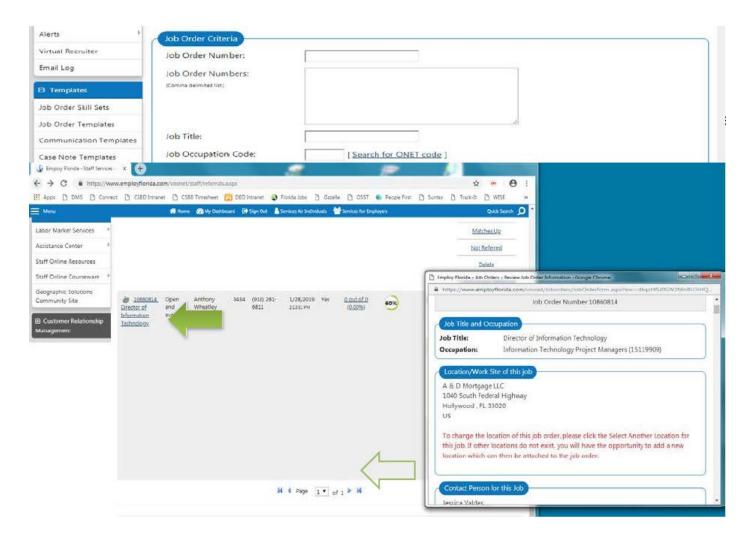


2. Select "Referrals Pending Review" option from sub-menu displayed.

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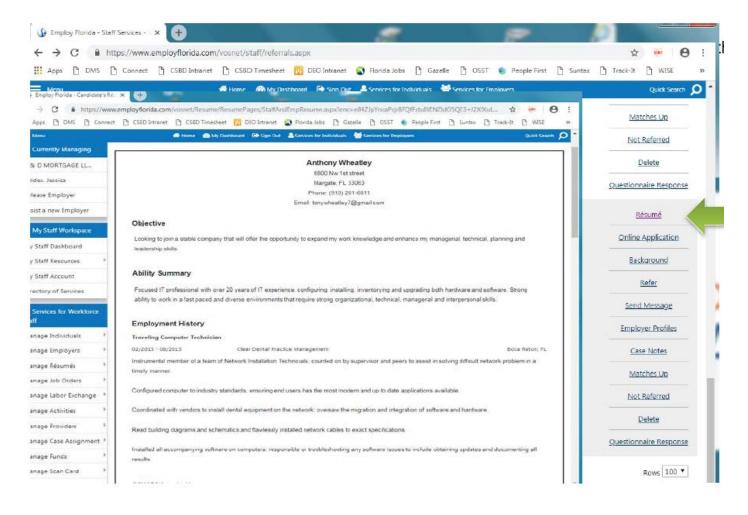
 Scroll down to "Job Order Criteria" and select CSNCFL from the LWIA Region drop-down menu and your assigned center from One Stop Location drop-down menu and then click on the search button.



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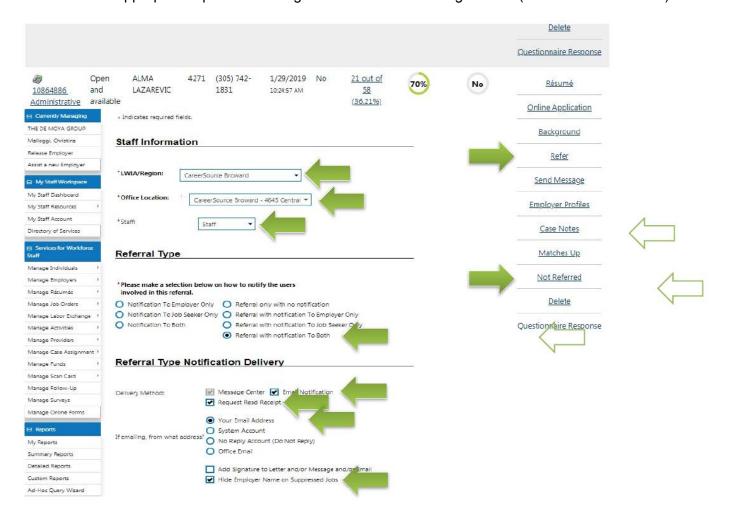
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- 4. Click on "Resume" to open the job seeker's resume.
- a) If the Resume action is clicked and a message pops up stating there is no resume on file, staff will review the customers Employ Florida account for active resumes prior to denying the referral.



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5. Once the comparison is complete, navigate back to the previous menu and select the appropriate option according to the resume screening results. (Refer or Not Referred)



Determining Eligibility for Referral

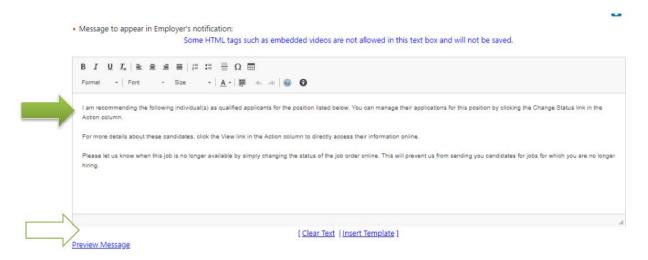
- 1) Navigate pending referrals list and click on the job number or title to display the job order details and review requirements from employer.
- 2) Click on "Resume" to open the job seeker's resume.
 - a) If the Resume action is clicked and a message pops up stating there is no resume on file, staff will review the customers Employ Florida account for active resumes prior to denying the referral.
- Compare the customer's resume to the requirements listed in the job order by reviewing the jobseeker's skills, abilities, prior work experience, education, and training certifications/licensure.
- 4) Once the comparison is complete, navigate back to the previous menu and select the appropriate option according to the resume screening results. (Refer or Not Referred)

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Referral of Qualified Candidates

- 1. Select Refer
- 2. Complete all required sections. Your screen should look like this example.
- 3. Modify message to employer



- 4. Under Employer Follow Up, click on No Employer Follow Up.
- 5. Modify the message to appear in Employer's notification as necessary.
- 6. Select appropriate jobseeker resume (which you have screened and reviewed for appropriateness) from the "Resume Title" drop-down menu.



- 2. Complete all required sections. Your screen should look like this example.
 - 7. Under Notification to Send to Job Seeker, modify the message to appear in the Job Seeker's message center as necessary.
 - 8. Under Job Seeker Follow Up, select the appropriate type of job seeker follow-up.
 - 9. Modify the message to appear in the Job Seeker's message center.
 - 10. Click the Save button.

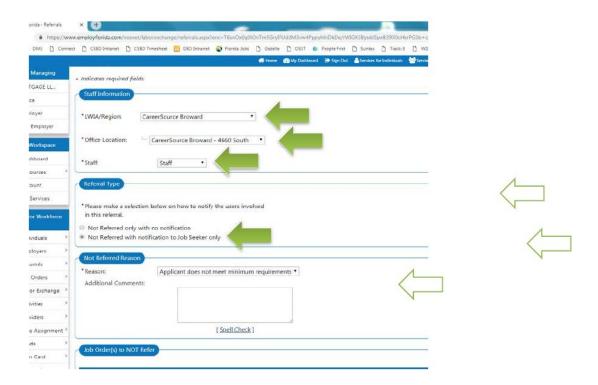
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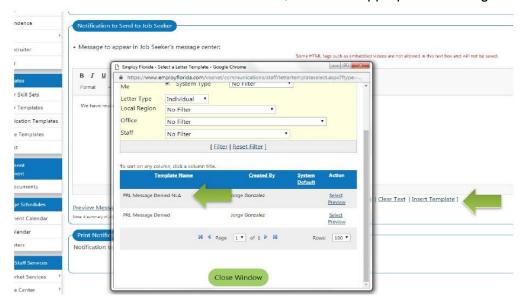
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Denial of Unqualified Candidates

- 1. Select Not Referred
- 2. Complete all required sections. Your screen should look like this example.



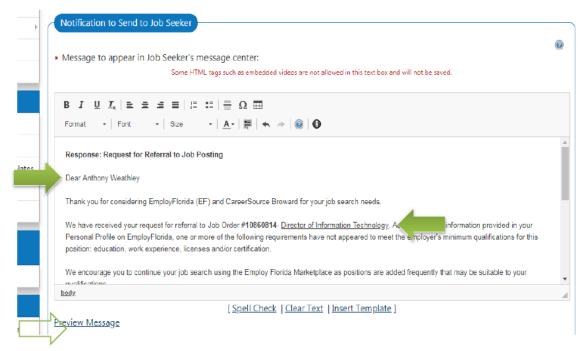
3. Under Notification to Send to Job Seeker, select the appropriate message from the message templates.



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4. Customize "Denial Notification" with Name of Jobseeker and Job order number and name.

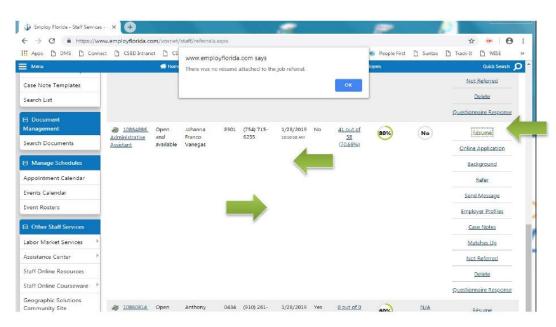


5. Click the Save button.

Note: These steps must be completed in REAL TIME after each request for referral denial. This process **IS NOT** to be postponed or completed all at once when finished with the list.

Action Steps When a Resume Is Not Attached

1) If the Resume action is clicked and a message pops up stating there is no resume on file, staff will review the customer's Employ Florida account for active resumes prior to denying the referral.



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2. If no active resume is located in the customer's Employ Florida account, deny the referral due to Lack of resume on EF.

Disposition, Documentation, and Case Noting

- If a pending referral is denied, Employ Florida will auto-generate a 591 activity code. If the system does not auto generate a case note, Placement Specialist should create the case note under the 591 ActivityCode.
- 2. Update the Pending Referral Assignment Spreadsheet with the outcome of the Pending Referral.

Disposition

- a. Referred: Qualified candidate referred to job order
- b. Denied NR: Candidate has no resume
- c. **Denied UR**: Candidate's resume is incomplete, has errors or is otherwise unsuitable.
- d. Denied DQ: Candidate does not meet job order requirements.
- e. Denied NLA: Job order no longer available



OFFICIAL SIGNATURE

PHYLLIS MARTY
Chief Executive Officer

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