

OSOS BUSINESS RULES AND DEFINITIONS

REFERENCE GUIDE

COMPREHENSIVE ASSESSMENT

The Comprehensive Assessment component consists of collecting, reviewing and analyzing information about a customer for the purpose of establishing an employment plan that best meets the overall needs, interests and aptitudes of the customer within the limitations of the current labor market situation.

Comp Assessment section is used by staff when evaluating a customer requiring “**intensive**” or “**training**” services and is used to determine WIA eligibility criteria. Comprehensive Assessment is also used to document barriers to employment.

Security level of “Case Management” or higher is required to gain access to the Comprehensive Assessment component.

Activities saved in Comprehensive Assessment will not give the message “**Record Saved**”, because they are saved in the Customer Detail.

Summary button provides details of all the tabs within Comprehensive Assessment in place of selecting each tab individually.

WIA Eligibility button sets the flags that are currently available for WIA eligibility criteria. These flags will change if certain customer information concerning WIA data entry is updated.

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SERVICES MODULE

The **Services** component is the area that tracks customer's course of study. Services entered in this area may appear on the WIA and TAPR and Worker Profiling reports.

- Provider = Training Provider
- Services = Course of study
- Offering = Training dates, times, availability and cost of the Providers Service

Active Agency is required prior to entering or updating a service.

Completion status for clients services should include completing the Service tabs "**Actual End Date**" for successful completions along with "**Actual Start Date**" and answering the "**Completed**" drop down with **Yes** or **No**. This will assure the service will be recorded on certain WIA, TAPR and Worker Profiling Reports.

Services History tab is a pop up screen with the details of any item on the History list. Highlight the service history item and then click the "**Detail**" button. This will also serve as a snap shot of any enrollment and provides a record of the criteria used at time of enrollment.