

Introduction to GPMS Data Collection Handbook Module III

EXIT, PLACEMENT, RIGHT OF RETURN, FOLLOW UP, ADD SERVICE,
AND ADD ORGANIZATION

Version 1.1

Version 1.1 of Module III of the GPMS Data Collection Handbook is focused on the sixth Cases tab, Related Actions, in the GPMS and includes all the menu items as listed in the heading on each page of the module. For ease of reference, the Handbook contains screen shots, with added sequential numbering of each field in each screenshot.

This updated version of Module III, like Modules I and II, and the GPMS itself, was very much a work in progress. Although the screenshots and data elements reflect the version of the GPMS production environment as the module was being drafted and reviewed, changes to the GPMS screens are occurring regularly, and Version 1.1 will not match the GPMS screens exactly in many instances. The Handbook incorporates changes to the GPMS that have been designed and scheduled for production, and new versions of each module will be issued as soon as feasible after new screenshots become available.

The Handbook text provides descriptions of the data elements, explanations of how best to capture and record the required information, and, where relevant, discussions of how the data elements relate to the SCSEP performance measures. Some of the descriptions and explanations contain additional comments. These comments do not always pertain directly to completing the data field but will give the user a fuller understanding of the data element. Therefore, all grantees and sub-grantees, including those that are initially collecting the required data in their own data collection systems, will need to be familiar with and follow the information in this Handbook.

There are “topics” in an appendix to each module of the Handbook. These topics provide more extended discussion of important issues for the data collection and reporting system. Topics generally address broad concepts, such as: what “exit” means, when follow-ups must be completed, and what services may be provided before assigning an applicant to community service. The topics are organized by the headings and sub-headings of the GPMS screen shots and have brief descriptive titles.

In addition, the Handbook references some of the edits and validations in the GPMS that control how, when, and in what form data must be entered. For complete information on the technical requirements for the data system, users should see the GPMS Users’ Guide and other relevant information on the Older Worker Community of Practice (CoP) <https://olderworkers.workforcegps.org/GPMS>. As they become available, PDF versions of each module of the GPMS Data Collection Handbook will be available at the CoP.

The Handbook has a version number and a date on the bottom of each page. The hard copy version of the Handbook that users may have been given may not contain the most up-to-date version of the modules. However, the version on the CoP will always be the most recent, and users are encouraged to check that site regularly. Additions and clarifications to the Handbook may also be posted on the CoP as they occur. In addition to the Table of Contents, the PDF versions of the Handbook and the Appendices have a search function that allows users to search for key words. The search function will bring you to each instance of the search terms in the Handbook. This is probably the easiest and quickest way to find topics in the appendix.

In Version 1.1 of Module III, revisions made to both screenshots and the field names are noted in the text. In addition, revisions have been made to the instructions for the following fields:

- Section I, Add Exit
 - *Field 1.1, Termination Letter Date*
 - *Field 1.2-1.5. Category of Exit/Unsub Subsidized Employment Type*
 - *Field 1.6-1.8. Category of Exit/Other Reason for Exit*
 - *Field 1.11. 90-Day Date*
 - *Field 2-2.2. Waiver of Confidentiality*
- Section III, Right of Return
 - *Field 4, Right of Return*
- Section V, Placement Follow-up
 - *Field 6.4 Follow-up 2 Date*
 - *Field 6.5 Earnings for second quarter after Exit*
- Section VI, Add New Service
 - *Field 8.6. Referral Outcome*

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I. ADD EXIT

I. ADD EXIT (Revised, Version 1.1)

1 Exit Information

<p>1.1 Termination Letter date </p> <input type="text" value="mm/dd/yyyy"/>	<p>1.2 Category of Exit *</p> <input type="text" value="Unsubsidized Employment"/>	<p>1.4 Exit Date *</p> <input type="text" value="11/01/2021"/>
<p>1.3 Unsubsidized Employment Type *</p> <p><input checked="" type="radio"/> Regular Employment</p> <p><input type="radio"/> Self-Employment</p>	<p>1.5 Exit Comments</p> <input type="text"/>	
<p>1.6 Category of Exit *</p> <input type="text" value="Other Reason for Exit"/>	<p>1.9 Exit Date *</p> <input type="text" value="mm/dd/yyyy"/>	
<p>1.7 Other Reason for Exit *</p> <input type="text" value="Please select a reason"/> <ul style="list-style-type: none"> Please select a reason Moved from area For cause Voluntary Durational limit Exclusions at Exit 	<p>1.10 Exit Comments</p> <input type="text"/>	
<p>1.8 Exclusion at Exit *</p> <input type="text" value="Please select a reason"/> <ul style="list-style-type: none"> Please select a reason Institutionalized Participant Health/Medical Deceased Reserve Forces called to Active Duty Ineligible at Re-Certification Due to Income 		

<p>1.11 90-Day Date 1/30/2022</p>	<p>1.12 <input type="checkbox"/> Deceased after exit?</p>
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1. Exit Information (Revised screenshot and field numbers, Version 1.1). This page is used to record when a participant ends his or her last community service assignment, is no longer being paid wages, and ceases to be a participant.

- “Exit” has several different meanings for the data collection and reporting system. For the performance measures, a recorded exit may not be considered final until a certain amount of time has passed. For example, if a participant has exited the program to enter unsubsidized employment, you should code the exit as due to unsubsidized employment, field 1.3, at the time it occurs. However, if the unsubsidized employment lasts for fewer than 30 days in the first 90 days after exit, the participant is entitled to a new host agency assignment without having to re-enroll, i.e., without completing a new Participant Form. See Right of Return, Section VII, below. If the participant elects to return to the program, the “exit” will be reversed and will not be counted in the performance measures. (See field 14.1 below.)
- For the core performance measures, an exit does not occur (and the individual is not included in the performance measures) until the participant has gone 90 days without a service from the program. Therefore,

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an individual who exits but receives a SCSEP service (which requires a new host agency assignment) within 90 days through re-enrollment, i.e., with a new participant intake, will be excluded from the measures. In this case, however, the original SCSEP “exit” will remain, and a new record will be created to reflect the re-enrollment. The exercise of the right of return also means that there has not been an exit for core measures purposes.

- Similarly, a participant who exits from one project but is transferred to another project has not officially exited the program and is not included in the performance measures until the participant has truly exited the project to which he or she was transferred. The movement of a participant from one sub-grantee to another sub-grantee within the same grantee is not an exit and is not recorded on the Exit page. It done through Cases or Related Actions. (See topics in the Appendix.)
- Normally, once an individual exits, he or she cannot become a participant again without re-enrolling. Re-enrollment requires the completion of a new participant intake and a new Community Service Assignment . (See Section VI and topics in the appendix for an exception.)
- Do not use the Exit page to record that a participant is on an approved break in participation, fields 11-11.8 of the Community Service Assignment page. Such an individual is still a participant. If the participant decides not to return from the leave and to cease participation in the program, you will record the exit at that point. The date of exit will be the date on which the participant decides not to return, not the date of the original leave.
- Do not use the Exit page to record that an applicant has withdrawn from the waiting list, has failed to complete the application, or has decided not to enroll after completing the application even if the applicant has been determined eligible. Exits are only for participants, not applicants. Until an applicant has been found eligible and been assigned to a community service assignment, you must use Related Actions or the Activity dropdown in Cases to record that an application has been withdrawn and the case is now closed.

1.1. Termination Letter Date (Revised Version 1.1). Enter the date on which you provided the 30-day notice of termination to the participant. This notice is required for all involuntary terminations, i.e., the first four exit reasons in field 1.7. An edit in the GPMS will not allow you to enter an exit date that is less than 30 days after the date of termination if the exit is due to one of these reasons.

- *(Revised, Version 1.1).* The termination letter date may be entered when you issue the letter, prior to the exit date.
- The regulations require that you must always provide written notice of the reason for any involuntary termination. You must give the participant 30 days’ notice and an opportunity to respond before you terminate. All terminations are subject to the grantee’s grievance procedure. Data validation is required for this element.

1.2-1.5. Category of Exit/Unsub Subsidized Employment Type (Revised, Version 1.1). In this field, you can select either unsubsidized employment or other reason for exit. If you select unsubsidized employment in field 1.2, field 1.3 must also be populated.

- In field 1.2, select “Regular Employment” if the participant exited into a full- or part-time job with an unsubsidized employer and the participant’s salary is not paid with program funds. There is no minimum number of hours per week required.
 - An OJE is not considered unsubsidized employment. A placement does not occur until the OJE has ended, the participant has exited the program, and the employer has officially hired the participant.
- Select “Self-employment” in field 1.3 if the participant exited the program to engage in self-employment. A self-employed individual includes someone who operates a business or profession as a sole proprietor, partner in a partnership, independent contractor, or consultant. An activity qualifies as a business if the primary purpose for engaging in the activity is income or profit, and the participant is involved in the activity with continuity and regularity. A sporadic activity or a hobby does not qualify as a business. Self-employment may be verified by any proof that the individual has started a business, such as tax registration, business cards or invoices, or a

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state license. The individual does not have to prove income from the business, but the receipt of income would suffice to establish self-employment.

- Enter the date of exit in field 1.4 and any comments in field 1.5.
- A placement does not result in credit for the performance measures unless the participant is employed during the second quarter after the quarter of exit. However, you should record the exit as due to unsubsidized employment at the time it occurs. Do not change the exit reason if the participant fails to start the employment or leaves it before achieving credit for being employed in the second Quarter after the exit quarter (Q2 Employment).
- *(Revised, Version 1.1)* A participant whose employment does not last for 30 days is entitled to re-enter the program. See section III below. When you enter the right of return to the program in field 4.1 below, the system will delete the exit. In a future release, the placement and any employment information entered into Section II, Placement Details, on the form will be available in GPMS as read-only. An approved break must be entered to cover the time the participant was not enrolled in the program and a new community service assignment has been entered. If the participant returns to the program, use the created approved break comments section to enter notes about the participant's return. (See the topics in Section III of the Appendix to this module.) If the participant has had multiple placements within the first 30 days of exit, enter the right of return in field 4.1 for the most recent placement only.

1.6-1.8. Category of Exit/Other Reason for Exit (Revised, Version 1.1). If the exit is not due to unsubsidized employment, you must select Other Reason for Exit in field 1.6.

- Select the appropriate reason from the dropdown in field 1.6. Only one reason may be entered for a participant. Select the reason that applies at the time of exit. If the participant has truly exited the program, you must select one of the five specified exit reasons in this field. If you feel that none of the five reasons applies perfectly, pick the reason that is closest and explain the circumstances in the comments field.
- Non-exit reasons for closing the record. i.e., a withdrawn application, are recorded in Related Actions or the Activity dropdown in Cases
- *(Revised, Version 1.1)* The first four selections in field 1.7 are negative outcomes that count against the performance measures:
 - Moved from area
 - For cause, as provided in the grantee's approved termination policy. Cause may include, but is not limited to the following:
 - Refusal to cooperate in recertifying eligibility;
 - Inability and/or unwillingness to perform assigned duties;
 - Unreasonable refusal to accept a different community service assignment;
 - Unreasonable refusal to accept job referrals or cooperate with the IEP;
 - Frequent tardiness;
 - Falsification by the participant of time sheets or other official records;
 - Insubordination;
 - Obscene/abusive language or behavior;
 - Non-compliance with substance abuse policy; and
 - Failure to cooperate with grantee and/or host agency staff.
 - Voluntary. Voluntary exit can occur for numerous reasons, including retirement.
 - *(Revised, Version 1.)* Durational limit. Use this field to indicate an exit due to the participant's having reached the durational limit for your project. You cannot select this reason prior to the participant's durational limit date. Policies regarding durational limits must be approved by the national office.
- The fifth reason, Exclusion at Exit, is neutral, neither positive nor negative for purposes of the performance measures.

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1.8. Exclusion at Exit

- The following four reasons for exit cause the participant to be excluded from the performance measures. The exclusion applies if these reasons exist only at the time of exit. If these reasons occur after the exit date, they are negative exits, and you may not record them as exclusions. However, you must record separately if the participant died after exiting the program. See field 1.12 above.
 - Deceased
 - Institutionalized. The participant is residing in an institution or facility providing 24-hour support, such as a prison or hospital, and is expected to remain in that institution for at least 90 days. For purposes of exclusion from the core performance measures, individuals with disabilities (as defined in 29 CFR 37.4) residing in institutions, nursing homes, or other residential environments are not considered to be institutionalized.
 - Participant’s health/medical. The participant is receiving medical treatment that precludes entry into unsubsidized employment or continued participation in the program. This does not include temporary conditions or situations expected to last for less than 90 days. An exit for health reasons that does not meet the criteria for an exclusion must be coded as voluntary.
 - Reserved forces called to duty
 - Ineligible at recertification due to income

Note that durational limit is not an exclusion.

- Data validation is required for the five exclusions in fields 1.7. The exclusions have specific technical standards imposed by the TEGL that establishes the rules for the core measures. If direct medical documentation is not provided, self-attestation or third-party attestation is permitted. The attestation for an exclusion based on a medical condition requires the participant or third party to attest that the participant is under the care of a specific physician and has been informed by that physician that the medical condition is expected to last at least 90 days and that the medical condition prevents the participant from continuing to participate in SCSEP.

1.9. *Exit Date.* Enter the date of exit in this field.

1.10. *Exit Comments.* Enter any comments or case notes .

1.11. *90-Day Date.* (Revised field number, Version 1.1) (system generated)

1.12. *Deceased after Exit.* (Revised to add data field number, Version 1.1) You must check this box if you discover that a participant has died after exiting. Doing so will prevent any surveys or other automated communication from being sent to the participant. Death after exit is not an exclusion.

2 Waiver Certification

Waiver of Confidentiality*

- 2.1 I hereby certify that the applicant has signed the Waiver of Confidentiality which authorizes the release of information regarding his/her employment status to the Senior Community Service Employment Program (SCSEP) program. This information may be used solely for statistical purposes and may not be disclosed to anyone not connected with SCSEP in a manner that is individually identifying.
- I hereby certify that the applicant has NOT signed the Waiver of Confidentiality which would authorize the release of information regarding his/her employment status to the Senior Community Service Employment Program (SCSEP) program.

2.2 Date when the Waiver of Confidentiality was signed

Username owatraining3+owacm1@gmail.com

TimeStamp Jan 3, 2023 10:41 AM

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2-2.2. *Waiver of Confidentiality (Revised, Version 1.1)*

- The waiver of confidentiality is only applicable to participants who are placed into unsubsidized employment. The waiver may make it easier for you to obtain the follow-up information from the employer. The participant should be encouraged to sign the waiver but cannot be required to do so. The participant's failure to sign does not relieve you of the obligation to conduct follow-up activity with the employer.
- New hard copy forms for GPMS data collection will be issued soon. The exit form will enable you to print the waiver on a separate page. Before having the participant sign the waiver in hard copy, add the participant's name, the employer's name, the name of the sub-grantee, and the name of the witness. The waiver in the old SPARQ Exit Form would work for this purpose.
- The signature and date are only applicable to the waiver of confidentiality. If the participant exited for a reason other than unsubsidized employment or if the participant refuses to sign the waiver, do not obtain a signature on this form. If the applicant does not wish to sign the waiver, check the second radio button to confirm that the participant did not sign the waiver. In that case leave the date blank.
- You may use any form of the waiver that you wish. If you prefer, you can have the participant sign a general waiver at the time of enrollment. In that case, you would need to modify the language to refer to employers generally and to indicate that the waiver is effective for 15 months from the date of exit rather than the date of signing.

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3 Placement Details

3.1 Start Date *

3.2 End Date

3.3 Site Name and Location

3.4 Self Employed? *

 Yes
 No

Employer
Agnes Walsh

3.5 Host Agency Employer?

 Yes
 No

3.6 Self Employed? *

 Yes
 No

3.7 Host Agency Employer? *

 Yes
 No

3.8

State	3.9 City	3.10 Organization Name
California	San Francisco	Lucy's House
<input type="button" value="SEARCH"/>		
Agency ID	Name	FEIN Address Primary Contact
No Organization Agencies Available		
<input type="button" value="ADD NEW EMPLOYER"/>		

3. Placement Details. The placement page must be started when a participant enters unsubsidized employment, including self-employment, either at the time of exit or within the first four quarters after the quarter of exit. (You do not need to complete the form for anyone who first begins unsubsidized employment after the end of the fourth quarter after the quarter of exit because it will be too late for the participant to achieve any of the three new employment outcomes.) You must continue to update the page for up to 15 months after the participant exits.

- These fields are used to capture basic information about:
 - the employer and the placement
 - contact information to facilitate the customer satisfaction survey
 - the employment and earnings information required for the performance measures
- Most of the information for these sections will be obtained from the participant at the time of the exit interview (or subsequently) or from the sub-grantee’s own records. If the participant is unable to provide certain information, it may be obtained from the employer before the date for the first follow-up. Information obtained from the participant may need to be verified once the sub-grantee has made contact with the employer.
- A new placement screen must be started for each unsubsidized employment that the participant has during the 15-month follow-up period.
- A participant may have simultaneous part-time jobs after exit. Only one job is needed to establish Q2 employment and Q4 employment, but the income from all jobs during the second quarter after the exit quarter will be counted for median earnings. As long as these are separate employer entities, you enter all into the GPMS and conduct all required follow-ups with each. (See the topics in the Appendix for a discussion of which follow-ups are required with which employers.) You can check "yes" with regard to Q2 and Q4 employment for each job, but the system will only give you credit once. You must enter into the system separate wages for the

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second quarter after the exit quarter for each job so that the GPMS gives you complete credit for all wages earned in those quarters.

- Field 3.7 belongs to a particular placement and thus can be different for each placement.

3.1. Start Date. Enter the date on which the participant began work with this employer. This will be the date of placement for measurement purposes. The exit date (field 1.8) must also be filled out. The exit date may be the day before the placement start date.

3.2. End Date. Enter the date on which the unsubsidized employment with **this** employer ended. If there is additional unsubsidized employment within four quarters after the quarter of exit from SCSEP, all unsubsidized employment may be included in the performance measures.

- The end date will determine when follow-up activity for each employer may be terminated.
- No end date is normally required for a placement that continues for more than four quarters after the quarter of exit. You will not have to obtain follow-up information after the fourth quarter after exit. However, if the original grantee or another grantee wishes to re-enroll a former participant who has an open placement end date, the original grantee will need to enter an end date for the placement. For that reason, whenever you know that a placement has ended (for example, you learn at follow-up that the participant is no longer working at this employer), it is advisable to enter the end date into this field.

3.3/3.11. Site Name and Location

- Enter here the site at which the participant is placed. This field is not required and is solely for case management purposes.
- You need not enter a full address. Merely provide enough information so that you can locate the participant at the employer's facility.

3.4/3.6. Self-employed? Indicate in 3.4 if the participant is self-employed. If you check "Yes," the GPMS will list the participant's name here as the employer. Do not complete field 3.5 since it is not relevant to self-employment.

- If you check "No," fields 3.7-3.10 will be displayed.
- Self-employment may be verified by any proof that the individual has started a business, such as tax registration, business cards or invoices, or a state license. If the participant is working completely under the table and does not want to provide you with any documentation of self-employment income, you will not be able to claim the placement for the performance measures. You must document self-employment just like you must document employment. You cannot merely take the participant's word for it.
- A self-employed participant will not receive the employer survey (although the individual may be selected for the participant survey) but will be included in all three of the employment outcome measures (Q2 employment, Q4 employment and median earnings). Follow-ups 1, 2 and 3 are required. See Section IV below.

3.5./3.7. Host agency Employer? This field is not relevant for self-employment. Complete it only if you check "No" in field 3.4. In a future release, field 3.7 will no display when field 3.6 is "Yes."

3.8-3.10. Search for Employer. Enter the name, city, and state of the employer by which the participant is being hired and click "Search." The GPMS will return a list of all organizations in the city and state that match or may match the employer you are seeking. If the list contains the employer you want, you must select it. The system will not allow you to enter a duplicate employer. If the organization you want is not listed, click on Add New Employer and fill out fields 11-13.6 below.

- It is critical that you do not needlessly create a new employer just because the participant will be working at a branch location. However, there are circumstances where using the name of the parent organization will not be

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feasible. In those cases, you may enter multiple organizations with similar but not identical names in the same state. For example, Walmart LA North, Walmart LA Central, and Walmart LA East are properly considered unique organizations even though they are all in Los Angeles, California; the geographic suffix allows them all to be entered. See the Appendix for additional information about avoiding duplicate organizations.

<p>3.11 Site Name and Location</p> <input type="text"/>	<p>3.18 Job Title</p> <input type="text"/>	<p>3.20 Starting Wage per Hour</p> <input type="text"/>
<p>3.12 Survey Contact</p> <input type="text" value="-- Select a contact --"/>	<p>3.19 Job Code*</p> <input type="text" value="-- Select a job code --"/>	<p>3.21 Average Hours</p> <input type="text"/>
<p>3.13 Supervisor</p> <input type="text" value="-- Select a supervisor --"/> <p>Select only if Supervisor is different than Contact</p>	<p><input type="text" value="Q Search"/></p> <ul style="list-style-type: none"> -- Select a job code -- Installation, Maintenance, and Repair Occupations Production Occupations Transportation and Material Moving Occupations Military Specific Occupations Management Occupations Business and Financial Operations Occupations Computer and Mathematical Occupations Architecture and Engineering Occupations Life, Physical, and Social Science Occupations Community and Social Service Occupations 	<p>3.22 Type of Placement*</p> <p><input type="radio"/> Full-time</p> <p><input checked="" type="radio"/> Part-time</p>
<p>3.14 Was Placement result of a Substantial Service Provided to Employer by Sub-Grantee?*</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>	<p>3.23 Expected Hours Per Week*</p> <input type="text"/>	<p>3.24 Benefits</p> <p><input type="checkbox"/> Health Insurance</p> <p><input type="checkbox"/> Sick Leave</p> <p><input type="checkbox"/> Pension / Profit Sharing</p> <p><input type="checkbox"/> Vacation</p> <p><input type="checkbox"/> Transportation</p> <p><input type="checkbox"/> Room and board</p> <p><input checked="" type="checkbox"/> Other</p> <p><input type="checkbox"/> None</p> <p>Check all that apply. If "None" is selected, you cannot select any other value.</p>
<p>3.15 Did employer provide an OJE training site?*</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>	<p>3.16 Training-related Placement?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>	<p>3.25 Other Benefits*</p> <input type="text"/>
<p>3.17 High-growth Placement</p> <input type="text" value="-- Please select a value --"/> <input type="text" value="Q Search"/> <ul style="list-style-type: none"> -- Please select a value -- Automotive Advanced Manufacturing Biotechnology Construction Energy 		

3.12. Survey Contact. You must select from the dropdown the person who will receive the customer satisfaction survey for the employer. The survey contact should not be confused with the primary employer contact for administrative purposes or the participant’s supervisor. There are separate fields for those individuals.

- The contact person is the individual with whom the sub-grantee has had the most contact regarding the placement of the participant. It is not necessarily the participant’s supervisor.
- If the person who should be the survey contact person for this participant is not listed in the dropdown, you will need to go to the function for adding organizations and contacts in the Admin Console. See field 8.5 in Section V below. This new contact will then be available to be used as the survey contact person in the fields below, a supervisor, or even the primary administrative contact for the host agency.

3.13. Supervisor (if different from survey contact). Enter the name and contact information for the participant’s supervisor only if that person is different from the survey contact. If the person you need as the supervisor is not listed in the dropdown, you can add a new contact for the employer through the function for adding organizations and contacts in the Administrative Console. See field 8.5 in Section V below.

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3.14. Placement the Result of Substantial Service?

- All placements are, to some extent, the result of the SCSEP program. Without the training provided by the community service assignment, participants would not have the skills and self-confidence needed to obtain employment. However, this field is designed solely to determine whether the employer perceives the sub-grantee as having actively facilitated the placement.
- Check “yes” only if the sub-grantee provided a substantial service to the employer as part of the placement process **and** the employer was aware of the efforts of the sub-grantee; e.g., the sub-grantee referred the applicant to the employer and the employer was aware of the referral.
- If the participant found his or her own job or if the sub-grantee only provided assistance directly to the participant without the employer’s knowledge, check “no.”
- This information will be used to determine which customer satisfaction survey employers will receive. This field is not relevant to employers that are host agencies. Do not complete this field for host agency employers.

3.15. Did Employer Provide OJE?

- Check “yes” if the employer provided an on-the-job experience (OJE) for **this** participant. If yes, you must have recorded an OJE training assignment with the same organization for the participant during the participant’s community service assignment.
- OJE placements are a subset of regular program placements in the QPR.
- Data validation is required for this element.

3.16. Training-related Training?

- Check “yes” if the participant is performing work related to the assignment that the participant had with the host agency or to any additional training provided by the sub-grantee.
- Information about the current job will usually be obtained from the participant, but it may be necessary to obtain additional information from the employer. Information about the host agency assignment and other training should be available from the sub-grantee’s records.

3.17. *High-growth Placement?* Use this field to indicate whether the placement is in one of the high-growth industries listed. You may select one of the 11 listed industries or “none.”

3.18. *Job Title.* Enter the participant’s job title as determined by the employer. This should be a descriptive title, such as receptionist, nutrition aide, or bus driver. No occupational code is required.

3.19. *Job Code.* You may enter one pre-defined code that reflects the particular job that the participant is performing.

3.20. *Starting Wage per Hour.* Enter the wage rate that the participant received at the beginning of employment with this employer. Do not update this field. This information is for management and analysis purposes only. It is not used for the performance measures. However, starting wage is important information about the quality of the jobs into which SCSEP participants are placed. The average starting wage in employment for all participants is reported in the QPR. If you update this field, valuable information will be jeopardized.

- Do not populate the field if the participant is self-employed. It is usually impossible to calculate an accurate hourly rate for self-employment.

3.21/3.23. *Average Hours per Week./ Expected Hours per Week.* Enter the average number of hours per week that the participant was hired for. If the participant is working less than full time as indicated in field 3.22, you must populate field 3.23. Field 3.21 will be eliminated in a future release.

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3.22. *Type of Placement.* Check the appropriate box to indicate whether the employment was expected to be full-time or part-time at the time of hire.

- If part-time, specify the number of hours per week that the participant was expected to work in field 3.23. Full-time work means work of at least 40 hours per week, or such lesser amount as determined by the employer to constitute full-time work.
- Under the employment outcome measures, **all** part-time placements may be counted. If the participant received any income greater than zero from unsubsidized employment (or self-employment) in the second quarter after the exit quarter, the placement will count as Q2 employment; any earnings greater than zero in the fourth quarter after the exit quarter will establish Q4 employment.
- The average number of hours per week in employment for all participants is reported in the QPR. This information, along with average starting wage, will help you monitor likely performance on the median earnings measure.

3.24/3.25. *Benefits/ Other Benefits*

- Check all benefits that the participant received (or was promised) at the time of employment. If “other,” specify in field 3.25 the additional benefit or benefits that the participant received. If the participant did not receive any benefits, check “none.”
- This information is for management and analysis purposes only. It is not used for the performance measures.

III. RIGHT OF RETURN

III. RIGHT OF RETURN (*Revised, Version 1.1*)

The screenshot shows a form titled "4 Right of Return". It contains two fields:

4.1 Has the participant returned to SCSEP within the first 90 days of exit?

This field has two radio button options: "Yes" (which is selected) and "No".

4.2 Date of Return *

This field is a date picker with a text input showing "mm/dd/yyyy" and a calendar icon to its right.

4. Right of Return (*Revised, Version 1.1*)

- (*Revised, Version 1.1*) The right of return is designed to afford participants a 30-day trial period in unsubsidized employment. It is limited to those participants who exit for unsubsidized employment but do not work for 30 calendar days within the first 90 days of exit. They are allowed to return to the program within 90 days without being subject to the priorities of service. Their exit is reversed, and they are treated as though they never left the program. You do not fill out a new intake for them. You must assign a returning participant to a host agency, either the one the participant left or a new one. You must create a new host agency assignment even if you reassign the participant to the old host agency. You will need to create an approved break in participation (see Section IV of Module II) that is at least as long as the gap between assignments. If there is no slot available at the time the participant seeks to return, the participant should be placed on an approved break in participation that lasts until the participant is given the next available assignment.
- (*Revised, Version 1.1*). If a participant has exercised the right of return and has a subsequent placement, the right of return can only be exercised once; it cannot be exercised a second time.
- Although the participant has this right, if the participant is job-ready, you should make every effort to place the participant in a new unsubsidized job before exercising the right of return and re-assigning the participant to community service. If the participant accepts a new job, you fill out a new placement screen and conduct the follow-ups with the new employer.
- (*Revised, Version 1.1*) Fields 4-4.2 will be displayed only if the participant has exited for unsubsidized employment, a placement has been entered and closed within the last 30 days, and no more than 90 days have elapsed since the exit date. If you try to enter a right of return more than 90 days after the exit date, the system will provide a message that this is not allowed.
- (*Revised, Version 1.1*) The right of return is meant to give participants a reasonable trial period. DOL has allowed a narrow exception for someone who was working irregularly or only a few hours a day or a few days per week. In that circumstance, the actual days worked can be counted rather than calendar days. This exception does not include everyone who works part-time because part-time work can be regularly scheduled for fewer than 5 days per week and most SCSEP participants exit working part-time (approximately 29-30 hours per week.) This is a judgment call that the grantee would need to make and document in case notes. The exception does not change the 90-day rule, so the participant would still need to return within 90 days of exit. If you try to enter a right of return of more than 30 calendar days for full-time work, the system will provide a message that this is not allowed.
- After you have closed the placement, use field 4.1 to record whether a participant who worked less than 30 days is electing to return to the program. If you selected "Yes," the system will delete the exit reason (field 1.1) and the exit date (field 1.3) from the Exit page. Enter the same date as the closing of the placement in field 4.2. (In a subsequent release, field 4.2 will be deleted because the date of return is determined by the date of closing the placement.)
- You will need to fill out a new Community Service Assignment screen to document the host agency assignment and enter an approved break in participation to cover the time between assignments. Use the comment field on the Exit screen to explain what you have done. The participant will not be included in the outcome

III. RIGHT OF RETURN

measures until the participant again exits the program. If the participant has had multiple placements within the first 30 days of exit, enter the right of return in field 4.1 for the most recent placement only.

- You can choose to re-enroll a participant who exited for any reason, provided the participant is not job-ready and meets the other eligibility requirements. Re-enrollment is not limited to 90 days of exit. It does require a new application and a new participant intake. A participant seeking to re-enroll is subject to the priorities of service in effect at the time. If there are no available slots or the re-enrolling participant is lower in priority than other applicants, you can place the re-enrolling participant on the waiting list. To initiate a re-enrollment, just do a participant search as you would for a first enrollment and select the participant's name when it is displayed in the search results.
- If the participant does not qualify for the right of return, the grantee has the discretion to re-enroll the participant by creating a new case.

IV. CUSTOMER SERVICE SURVEY

IV. CUSTOMER SERVICE SURVEY

5 Survey Information

Enter the last 5 digits of the Customer Service Survey Number in the form below.

5.1 Survey 1 Eligibility Date	5.2 Customer Satisfaction Survey 1 #	5.3 Date of Delivery
<input type="text" value="mm/dd/yyyy"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>
5.4 Survey 2 Eligibility Date	5.5 Customer Satisfaction Survey 2 #	5.6 Date of Delivery
<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>
5.7 Survey 3 Eligibility Date	5.8 Customer Satisfaction Survey 3 #	5.9 Date of Delivery
<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>

5. *Survey Information.* At this time, no data should be entered into this section. This section will be removed in a future release of the GPMS.

V. PLACEMENT FOLLOW-UP

V. PLACEMENT FOLLOW UP

6 ▼ Follow Up Details

Follow-Up 1 (10/1/2022 - 9/30/2023)

6.1 Follow-Up 1 Date

6.3 Follow-Up 1 Notes

0 / 2000

6.2 Any wages for second quarter after exit quarter?

Yes

No

Follow-Up 2 (1/1/2023 - 9/30/2023)

6.4 Follow-Up 2 Date

6.6 Follow-Up 2 Notes

6.5 Earnings for the Second Quarter After the Exit Quarter?

Follow-Up 3 (4/1/2023 - 9/30/2023)

6.7 Follow-Up 3 Date

6.9 Follow-Up 3 Notes

6.8 Any wages for fourth quarter after exit quarter?

Yes

No

6. Follow-up Details. Follow-ups are required in order to obtain information needed for the performance measures, to provide case management to a newly placed participant, and to establish or maintain contact with the employer. The system has been designed to require the minimum possible number of follow-ups.

- In order for the participant to exit for purposes of the employment outcome measures, the participant must not have received any program services (other than the specifically defined follow-up activities or services listed below) for 90 days. For SCSEP, additional program services other than those listed below would require returning to the program or re-enrolling in the program. The GPMS automatically provides the 90-day date at the bottom of the Exit page. See Section I above.
- Additional services for purposes of the employment outcome measures do not include specifically defined follow-up activities or post-exit services for participants who have placements. If the participant has received any of the following supportive services or follow-up services within 90 days after exit but has not re-enrolled, follow-ups should be conducted:
 - Supportive Services
 - dependent child and adult care
 - payment for occupational and testing fees
 - food assistance
 - health care and medical services
 - temporary shelter
 - needs-related payment, e.g., utilities
 - special job-related or personal counseling
 - payment of reasonable costs of transportation
 - incidentals (such as work shoes, badges, uniforms, eyeglasses, and tools)
 - Follow-up Services
 - counseling to participant on job-related issues
 - help finding another job
 - intervention with the employer
 - referrals to other services

V. PLACEMENT FOLLOW-UP

These follow-up activities are specifically authorized in the regulations in order to help a participant in unsubsidized employment achieve Q2 and Q4 employment.

- If efforts to obtain the follow-up information from the employer are unsuccessful, the sub-grantee may obtain the information from the participant.
- Missing or incomplete follow-up information, regardless of the reason for the incompleteness, will have a negative effect on the performance measures.
- Failure to conduct required follow-ups may be considered a violation of the administrative requirements of the grant.

6.1. Follow-up 1 Date? Enter the date on which you conducted Follow-up 1. The GPMS displays above this field the first and last quarters during which this follow-up can be conducted and entered into the GPMS.

- This date is critical for the performance measures. The GPMS will not let you submit a follow-up record without this date or with an improper date in this field.
- The GPMS contains case management reports that will help you keep track of follow-ups that are pending, overdue, or expired. In addition, case workers will receive a Task & Notification when a follow-up is due. In a future release, overdue follow-ups will be escalated to sub-grantee administrators before the program year is closed.

6.2. Any Wages for Second Quarter after Exit Quarter? Check “Yes” if the participant has received any amount of wages from employment or self-employment in the second quarter after the exit quarter. Do not consider the quarter in which the participant first exited or the first quarter after the exit quarter. For this purpose, you do not need to know the amount of the wages.

- You have until 90 days after the end of the program year in which the reporting quarter falls to complete Follow-up 1 and get credit for Q2 employment.
- If you check “no” or leave the field blank, the exit will not be counted as Q2 employment, and the median earnings measures will not apply. You will not need to conduct Follow-up 2. However, you will have to do Follow-up 3.
- Exclusions discovered after exit are no longer recordable.
- Complete this field for self-employed individuals.
- Data validation is required for this element.
- Follow-up 1 is designed for case management purposes as well as for establishing Q2 employment. Therefore, it should be completed as close to the beginning of the second quarter after the exit quarter as is feasible. The follow-up will not be reported as a success or failure until the second quarter after the exit quarter has ended. On the first day of the third quarter after the exit quarter, the QPR for the prior quarter will reflect everyone who could have achieved Q2 employment. See topics in the Appendix.
- Follow-up 1 should be conducted in person if at all possible. If it is not feasible to conduct the follow-up in person, it may be conducted by phone.
- The follow-up with the participant is part of case management. It is an opportunity to see if the placement is going well and to determine whether the participant needs supportive service, counseling, or other assistance to be successful in the placement. If the placement is not working out, the follow-up may be the time to suggest another placement for the participant.
- The follow-up is also an opportunity to establish a relationship with the employer if one has not already been established. This may be especially important if the participant obtained the job without assistance from the sub-grantee and the employer is not aware of the connection with the program. This contact allows the sub-grantee to explain SCSEP to the employer, learn about the employer’s needs, and begin a relationship that may yield additional placements.

V. PLACEMENT FOLLOW-UP

- Sub-grantees should use this first follow-up to prepare the employer for Follow-up 2, at which time the employer will need to provide wage information. Explaining the program during an in-person conversation may make the employer more willing to cooperate later.
- If the participant has multiple employers, you conduct Follow-up 1 with the current employer to determine whether there was employment in the second quarter after the exit quarter and work backwards until you find a success. If the participant achieves Q2 employment with one employer and then has subsequent employment with another employer, you do not conduct Follow-up 1 with the subsequent employer. You might have to do Follow-up 2 with both the first and second employers depending upon when the first employment ended. See the topic on follow-ups with multiple employers in the Appendix.

Note: A follow-up does not itself constitute a substantial service. All employers will receive the first follow-up. Only those employers that have received a substantial service in connection with the placement of the participant should be recorded in field 3.14 as receiving a substantial service.

6.3/6.6/6.9. Notes. These fields allow you to enter separate comments or case notes for each of the three follow-ups.

6.4 Follow-up 2 Date (Revised, Version 1.1). Enter the date on which you conducted Follow-up 2. The GPMS displays above this field the first and last quarters during which this follow-up can be conducted and entered into the GPMS.

- (Revised, Version 1.1) You must conduct Follow-up 2 if you selected “Yes” in field 6.2 for Follow-up one, employment (wages?) in Q2.
- This information is required for all three employment outcome measures. The GPMS will reject any follow-up record that is missing the completed date or has an improper completed date.
- You will usually need to wait until a week or so after the close of the second quarter after the quarter of exit in order to obtain full wages for the second quarter after the exit quarter.
- The GPMS contains case management reports that will help you keep track of follow-ups that are pending, overdue, or expired.
- You may record the completed follow-up as early as the first day of the third quarter after the exit quarter, but the results will not be reflected in the QPR for that quarter until the first day of the fourth quarter.

6.5 Earnings for second quarter after Exit Quarter (Revised, Version 1.1) . Enter the actual amount of wages (or net income from self-employment) for the second quarter after the exit quarter at this placement. Although some of the wages are available earlier than the third quarter, you obtain them during the third quarter after the quarter of exit, so you can obtain the complete wages from the employer in a single follow-up.

- (Revised, Version 1.1) \$0.00 is no longer a valid value for this follow-up. You must include earnings of at least \$1 for any participants for whom you have recorded Q2 employment in field 6.2, including self-employed participants; otherwise, you will ultimately lose credit for the Q2 employment you recorded. “Yes” in Follow-up 1 (field 6.2) is only valid if there are some actual wages in the second quarter after the quarter of exit.
- Data validation is required for this element.

6.7. Follow-up 3 Date. Enter the date on which you conducted Follow-up 3. The GPMS displays above this field the first and last quarters during which this follow-up can be conducted and entered into the GPMS.

- This information is required for all employment outcome measures. The GPMS will reject any follow-up record that is missing the completed date or has an improper completed date.
- The GPMS contains case management reports that will help you keep track of follow-ups that are pending, overdue, or expired.

V. PLACEMENT FOLLOW-UP

- This follow-up captures employment in the fourth quarter after the quarter of exit for all participants regardless of whether they had wages in the second quarter after the quarter of exit. This follow-up effectively extends the follow-up period to 15 months from the time of exit.
- You record only the fact of employment, not the amount of wages earned in this quarter.
- Both the activity and reporting periods are the fourth quarter after the exit quarter, so you may record the completed follow-up as early as the first day of the fourth quarter after the exit quarter, but the results will not be reflected in the QPR for that quarter until the first day of the fifth quarter.

6.8. Any Wages for Fourth Quarter after Exit Quarter? Check “Yes” if the participant has received any amount of wages from employment or self-employment in the fourth quarter after the exit quarter. Do not consider the quarter in which the participant first exited or the first quarter after the exit quarter. For this purpose, you do not need to know the amount of the wages.

- You have until 90 days after the end of the program year in which the reporting quarter falls to complete Follow-up 1 and get credit for Q2 employment.
- For these purposes, do not consider the quarter in which the participant first exited or the first, second, and third quarters after the exit quarter. For example, if the participant exited and began employment on July 24, 2023, the fourth quarter after the quarter of exit would be July 1, 2023-September 30, 2024.
- If you check “no” or leave the field blank, the exit will not be counted as Q4 employment, but Follow-ups 1 and 2 would still be valid.
- Exclusions discovered after exit are no longer recordable.
- Complete this field for self-employed individuals.
- Data validation is required for this element.

VI. ADD NEW SERVICE

VI. ADD NEW SERVICE (Revised Version 1.1)

7 General Details

7.1 Placement*

Placement Date - 2/6/2023

7.2 Category*

Supportive Services

7.3 Type*

- Other (Specify)
- Pick a category
 - Dependent Care (e.g., Child or Adult Care Assistance)
 - Educational or Occupational Licensing and Testing Fees
 - Food Assistance
 - Health and Medical Services (e.g., RX, Eye Glasses, Medical Test)
 - Housing (e.g., Temporary Housing Assistance)
 - Needs-related Payment (e.g., Utilities)
 - Other (Specify)**
 - Special Job-related or Personal Counseling
 - Transportation Assistance
 - Work Related Assistance (e.g. Uniform, Badges, Tools)

7.4 Other Type*

7.5 Category*

Follow-Up Services

7.6 Type*

- Referrals
- Pick a category
 - Counsel Participant on Job-Related Issues
 - Help Participant Get Another Job
 - Intervention with Employer
 - Other (Specify)
 - Referrals**

7.7 Other Type*

8 Referral Details

8.1 Initial Date

mm/dd/yyyy

8.2 Follow-Up Date

mm/dd/yyyy

8.3 Reason

8.4 Follow-Up Successful

Yes No

8.5 Follow-Up Completed

mm/dd/yyyy

8.6 Referral Outcome

- Please select a value ---
- Referral Service Received
 - Referral Service not Received
 - Unknown

VI. Add New Services. At any time after the participant has been placed and is in follow-up, you must use this section of the GPMS to record Follow-up Services or Supportive Services provided to the participant. Once the participant has exited, you can no longer provide Education and Training, but you can provide specified Follow-up Services, as well as Supportive Services below, during the first 12 months of placement. The GPMS limits the types of services available on these screens based on the status of the participant. The screen shot above is based on a participant in Exited- Follow-up status.

- Additional services for purposes of the employment outcome measures do not include specifically defined follow-up activities or post-exit services for participants who have placements. If the participant has received any of the following supportive services or follow-up services within 90 days after exit but has not re-enrolled, follow-ups should be conducted:
 - Supportive Services
 - dependent child and adult care
 - payment for occupational and testing fees
 - food assistance
 - health care and medical services
 - temporary shelter
 - needs-related payment, e.g., utilities

VI. ADD NEW SERVICE

- special job-related or personal counseling
- payment of reasonable costs of transportation
- incidentals (such as work shoes, badges, uniforms, eyeglasses, and tools)
- Follow-up Services
 - counseling to participant on job-related issues
 - help finding another job
 - intervention with the employer
 - referrals to other services

These follow-up activities are specifically authorized in the regulations in order to help a participant in unsubsidized employment achieve Q2 and Q4 employment.

7.1. Assignment. Follow-up Services and Supportive Services must be associated with a specific placement. A participant can receive multiple services at each of multiple placements, but you must enter each instance separately.

7.2. and 7.5. Category. Each service in the Follow-up Services and Supportive Services module has a category and a type. Select in these fields either of the two categories available for participants in follow-up.

7.3/7.4 and 7.6/7.7. Type. Select the corresponding type from the dropdown in fields 7.3 and 7.6. If you select Other in field 7.3 or 7.6, you must specify the type in fields 7.4 and 7.7. In a future release, if you select Referral in field 7.6, there will be an dropdown for the type of referral. Wherever possible, select one of the listed types rather than “Other.” Doing so will enable more complete and accurate reporting of the services provided.

- Grantees must document each instance of supportive service provided to a participant during a placement. The same information is collected for supportive services provided during the community service assignment.
- You may select only one type of supportive service for each instance of supportive services provided. You may create as many instances of this element as needed to record all instances of supportive services provided at a placement.
- If supportive services are entered here, you must also value fields 10.4 and 10.5 below.

8. Referral Details. If you select Follow-up Services in field 7.6, fields 8 and 9 will appear.

8.1-8.5. Follow-up details. Use these case management fields to record the actions you take to ensure that the referral is completed

8.1. Initial Date. Enter the date on which you made the referral to the participant.

8.2. Follow-up Date. Enter the date on which you followed up on the referral with the participant.

8.3. Reason. Enter the reason for the referral.

8.4 Follow-up Successful. Indicate if you were successful in reaching the participant to learn if the participant took action on the referral. Currently, if you select “no” for this field, the Service Details in Section VI will not be displayed. This will be fixed in a future release.

8.5. Follow-up completed. Enter the date on which you completed your follow-up efforts.

8.6. Referral Outcome (Revised, Version1.1). Regardless of whether your follow-up efforts were successful, indicate whether the participant received the service to which they were referred.

VI. ADD NEW SERVICE

9 Service Details

9.1 Start Date *

9.2 Expected End Date *

9.3 Actual End Date

9.4 Is this a One Day Service? *
 Yes No

9.5 Comments

9. Service Details. These fields appear for all services regardless of the category or type selected. However, as explained above, if field 8.4 is “no,” the service details do not currently display. This issue will be corrected in a future release.

9.1-9.4. Dates of Service. You must enter the date on which the service began, the expected end date, and the actual end date (but only when the service has actually ended).

- If known, also enter the expected end date. If you are uncertain about the end date, it is a good idea to enter a date that is reasonable under the circumstances. The GPMS will send you a notification if the participant exceeds this date. You may update this date at any time.
- At the conclusion of the service, you must enter the date on which the service ended. This date must be on or after the start date and the expected end date.
- If the service will be concluded in one day, check “Yes” in field 9.4. The GPMS will then grey out fields 9.2 and 9.3.

9.5. Comments. You may enter here any comments pertaining to the specific services provided.

10 Additional Fields

Service Provider *

10.1 State **10.2 City** **10.3 Organization Name**

Agency ID	Name	FEIN	Address	Primary Contact
No Organization Agencies Available				

10.4 Supportive Service Provided By *

Grantee or sub-recipient/local project
 Workforce partner
 Other
 Both i and ii
 Both i and iii

10.5 Other (Specify) *

10. Additional Fields. Depending on the category and type selected above, the GPMS may display additional fields or make some Service Detail fields conditionally required. For example, Service Provider is required for all Follow-up Services but is optional for Supportive Services; conversely, Supportive Services require additional information that is not displayed for Follow-up Services.

10.1-10.3. Service Provider. As with host agencies and employers, enter the name, city, and state of the entity providing the service and click “Search.” The GPMS will return a list of all organizations in the city and state that match or may match the entity you are seeking. If the list contains the entity you want, you must select it. The system will not allow you to enter a duplicate entity. If the entity you want is not listed, click on “Add New Service Provider” and fill out the fields required.

VI. ADD NEW SERVICE

- Remember, an existing entity can be used as all three types: host agency, service provider, and employer. Whenever possible, use an existing entity by assigning an additional type to it rather creating a new entity.

10.4-10.5 Supportive Services Provided By. Although grantees are required to assess all participant's needs for supportive services and may provide such services themselves, to the extent feasible, grantees are required to have other community partners provide or pay for such services. You must indicate the type of entity providing or paying for the specific supportive service entered. You may select only one value.

VII. ADD ORGANIZATION

VII. ADD ORGANIZATION

Add Organization

11 Organization Details		12 Additional Details	
11.1 Organization Name	<input type="text" value="Lucy's House"/>	11.2 Organization Type*	<input type="radio"/> Government
11.3 FEIN	<input type="text"/>	<input type="radio"/> Profit	<input type="radio"/> Not For Profit
11.4 Address Line 1*	<input type="text"/>		
11.5 Address Line 2	<input type="text"/>		
11.6 City*	11.7 State*	11.8 Zip*	11.9 Zip+4
<input type="text"/>	<input type="text" value="--- Select a Stat..."/>	<input type="text"/>	<input type="text"/>
		12.1 Agency Type	12.2 Organization Continued Availability
		<input type="text" value="Employer"/>	<input type="radio"/> Available
		<input type="text" value="--- Please select a value ---"/>	<input type="radio"/> Not Available
		<input type="text" value="Host Agency"/>	
		<input type="text" value="Employer"/>	
		<input type="text" value="Service Provider"/>	

11-12.2 Add Organization. In addition to the Add Host Agency function in fields 3.8-1.10, the Administrative Console allows you to add an organization and identify it as a host agency, service provider, employer, or any combination of these three types. This function is very similar to the organization utility in SPARQ.

- You can only use this function after searching for the name, city, and state of the entity you want and having the system fail to return any matches. At that point, you can create the new entity.
- It is critical that you always add an employer type (field 12.1) to an existing entity like a host agency rather than creating a new, duplicate entity when that host agency becomes the employer of a participant who has left the program. The duplication of the entity distorts your data and will prevent the entity from getting the proper surveys.
- This function is dynamic and will display different fields based on upon each entity type you want to assign to the entity. There are also validations that will prevent you from designating an entity type that does not have the correct characteristics.
- You use this function to create contact persons and supervisors for a new entity. See fields 13-14.9 below. At the time you create a CSA, training event, or placement, you can add additional contact persons and supervisors if the ones you need have not yet been created.
- In a future release, you may be able to select up to three job codes indicating the types of employment this employer organization can provide. This information may be helpful to you in your job placement activities. That ability currently exists for host agency organizations.

11.1. Organization Name. Enter the name of the parent organization as you want it to appear in a letter or email that is transmitting a customer satisfaction survey.

- It is critical that you do not needlessly create a new entity just because the participant will be working at a branch location. However, there are circumstances where using the name of the parent organization will not be feasible. In those cases, you may enter multiple organizations with similar but not identical names in the same state. For example, Walmart LA North, Walmart LA Central, and Walmart LA East are considered unique organizations even though they are all in Los Angeles, California. See the Appendix for additional information about avoiding duplicate organizations.

11.2. Organization Type. You may ultimately identify the organization as two or three types, but you must select and complete one type at a time.

- Host agencies must be either Section 501(c)(3) non-profit organizations or government agencies.
- Employers and training providers may be any organization type.

VII. ADD ORGANIZATION

11.3. *FEIN*. You may enter the entity's FEIN if you wish. It is not required.

11.4-11.9. *Address*. Enter the address at which mail is most likely to be delivered by the Postal Service. Do not put any extraneous information or characters in these fields. If you need other information about the entity, use a comment field; do not put it into these fields.

12.1 *Agency Type*. Select the desired agency type for a new entity. For an existing entity, you can select an additional agency type by clicking "Add New." An entity may be all three types, but you can only add one type at a time.

- Each agency type you indicate in this field may cause additional fields that are relevant to that agency type to be displayed.

12.2. *Organization Continued Eligibility*. Use this field to indicate if an existing organization should no longer be used by the grantee or sub-grantee. This field should only be valued by a grantee or sub-grantee administrator. Field 12.2 is not unique to the employer and can differ for each grantee using that employer.

13 ▼ Contact Information		14 ▲ Contact Address	
13. Salutation	<input type="text" value="Please Select Value"/>	14.2 <input checked="" type="checkbox"/> Check if Contact Address is different than the Organization Address	
13. Contact First Name*	<input type="text"/>	14.3 <input checked="" type="checkbox"/> Check if Location Name is different than Organization Address	
13. Contact Last Name*	<input type="text"/>	14.4 Location Name	<input type="text"/>
13. Title*	<input type="text"/>	14.5 Address*	<input type="text"/>
13. Primary Contact Number	<input type="text"/> <input type="checkbox"/> Cell ?	A value is required	
13. Alternate Contact Number	<input type="text"/> <input type="checkbox"/> Cell ?	14.6 City*	14. State* 14.8 Zip* 14. Zip+4
13.1 Fax Number	<input type="text"/>	<input type="text"/> A value is required	<input type="text"/> A value is required <input type="text"/> A value is required
13. Primary Extension	<input type="text"/>		
13. Is Primary POC?	<input checked="" type="radio"/> Yes <input type="radio"/> No		
13. Alternate Extension	<input type="text"/>		
13.1 E-mail	<input type="text"/>		

13. *Contact Information*. As part of adding a new organization through the Administration Console, you must also create contacts. These are individual who are then selected as the Primary Administrative Contact for the organization, as survey contacts for specific CSA assignments and unsubsidized placements, and as supervisors.

- 13.1-13.3. Enter the contact name and salutation as you want them to appear in a letter or email that is used to transmit the customer satisfaction surveys. Do not put any special characters or other information into the name fields.
- 13.4. Title is solely for grantee use. It is not used in transmitting the surveys.
- 13.5. Check the box to indicate if this individual is the primary contact for administrative purposes, e.g., approving the hiring of the participant or releasing wage information. This individual may also serve as the survey contact or supervisor for a specific CSA or placement.
- 13.6-13.10. Be sure to check the boxes if the primary and alternate phone numbers are for cell phones. Cell phones may be used for sending text messages.
- 13.11. It is critical that you obtain the survey contact person's email address and enter it accurately. Because this address may be used to deliver the survey, it is also critical that you regularly conduct business by email with the contact person. This will ensure that the email remains accurate and that the contact becomes accustomed to receiving email from you.

VII. ADD ORGANIZATION

- *14-14.9.* You do not need to enter the contact's address or location if they are the same as those of the organization itself. Fields 14.1-14.9 will be displayed only if you check the boxes to indicate that the address or location are different.