

WELCOME TEAM PROCEDURES

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Section 1

General Mission, Goals and Organization

This manual outlines the organizational structure and flow of the Welcome Team Process of the Eastern Area Workforce Development Board (EAWDB).

1.1. Mission

To greet customers, begin the assessment of customer skill levels consistent with employers' needs, and direct customers to services and opportunity of the **New Mexico Workforce Connection** in a manner that captures the customer's interest, while maintaining quality of service.

1.2. Goals

- Continue the functional integration of services in the NM Workforce Connection offices in order to minimize costs, maintain offerings despite funding cuts and improve customer service.
- Satisfaction, while attaining performance goals at or above State-performance levels.
- Increase business, job seeker and youth utilization of free and low-cost workforce services.
- Increase employer involvement in the academic and workforce skills development of local customers.
- Increase employer involvement in the academic and workforce skills development of local youth.
- Increase the number of customers engaged in short-term training and intensive services that lead to employment in high-wage occupations in demand.
- Improve long-term job retention of low-income and targeted program customers.

1.3 Organization

The Welcome Team function is the entry point for Workforce Connection services for all employers and jobseekers. Responsibilities include processing registration, marketing services, recommending appropriate services to customers and ensuring that customers maintain an "active" status with ongoing service activities to meet changing needs. The welcoming function continuously coordinates with the Skill and Business Teams for new information and/or services.

1.4. Welcome Team Knowledge

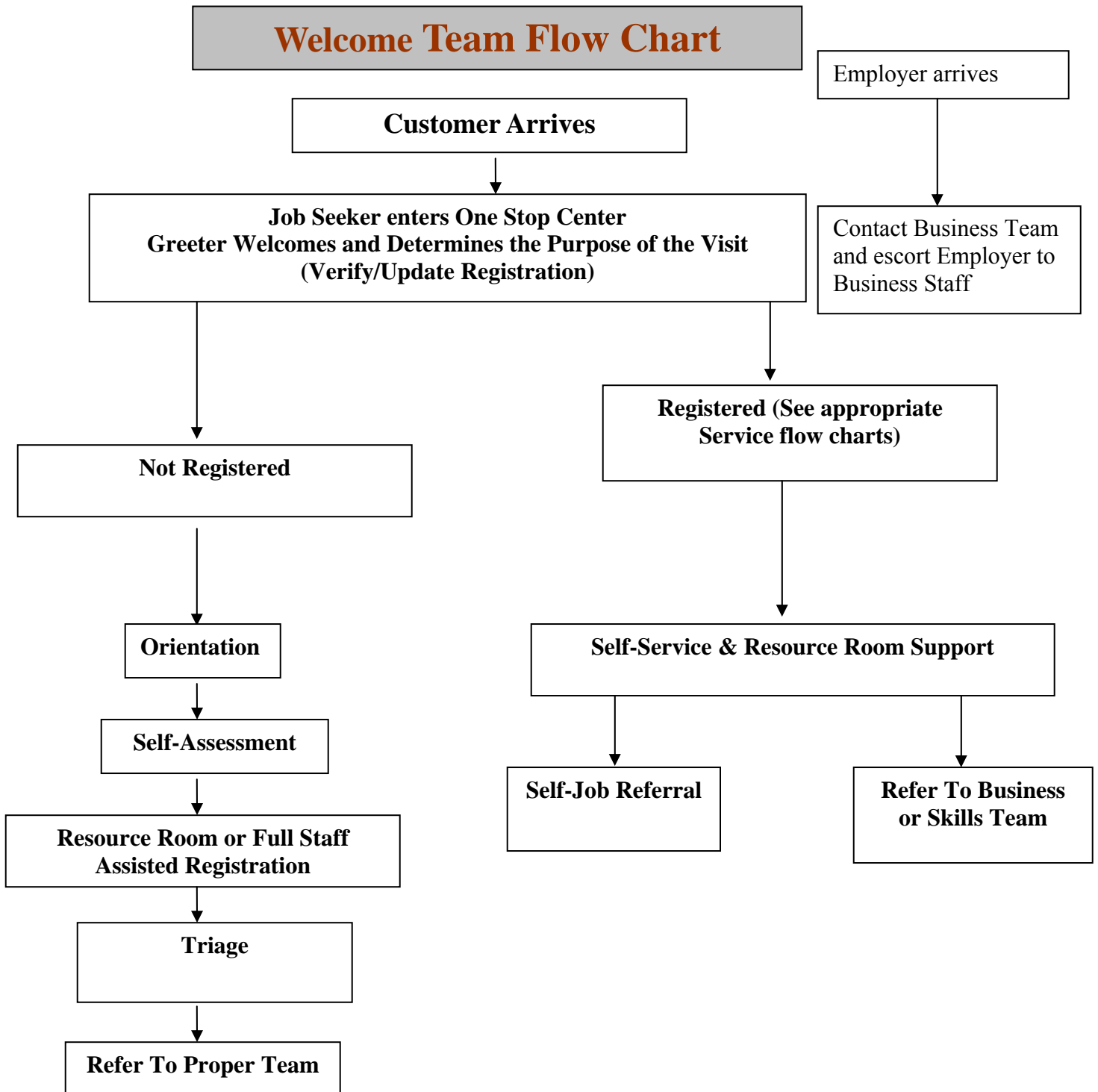
- **Economic Development** – understanding of the key factors that drive the local economy. Needs knowledge of high demand, high growth industries and occupations, workforce needs that drive business success/failure/, and community resources available to local companies and individuals citizens.
- **Public relations** – knowledge of marketing and branding principles to expand awareness of the Workforce Connection's system and services.
- **Customer and Professional Service** – knowledge of principles and processes for providing customer and professional services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.

- **Clerical** – Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, fax machines, phones, computers etc.
- **English language** – knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition and grammar.
- **Computers and Electronics** – knowledge of computer software – at a minimum Microsoft WORD, EXCEL OR ACCESS, AND POWERPOINT.

1.5. Welcome Team General Task

- Answer, screen and forward calls, provide information, take messages
- Greet persons entering establishment, determine the nature and purpose of the visit, and direct or escort customer to specific destinations.
- Provide an orientation to the Center's services and information such as location of departments, offices and employers within the organization or services provided.
- Hear and resolve complaints from customers or/and refer to supervisor.
- Transmit information or document to customers using computer, mail, or facsimile machine.
- Analyze information to determine answers to customer's questions.
- Assist customers with the registration processes and co-enroll customer in the NMVOSS database.
- Provide basic and enhanced staff-assisted services; such as resume preparation and job search.
- Provide assistance with the use of all equipment and resources in the Resource Room.
- Assist customers in the Resource Room with job search, resume building, Internet browsing and email applications.
- Assess and analyze the skill levels, aptitudes and abilities of job seekers.
- Access various data systems (e.g. NMVOSS, ONET).
- Triage customers to the next appropriate service.
- Respond to customer inquiries by promoting available services as solutions to their employment and training needs. Providing accurate information by giving the job seekers options on how and when to access services.
- Personally introduce new customers to a Skills Development/Business Team member

1.6. Welcome Team Customer Flow Chart



Section 2

Switchboard Operator

2.1. Switchboard Operator Functional Responsibilities

- Answer all incoming calls, routing calls promptly and correctly to proper One Stop staff
- Take and relay urgent messages to One Stop staff when necessary
- Serve as backup to switchboard operator and Career Development Expeditor
- Other clerical duties as assigned

Qualifications:

- A High School Diploma or successful completion of the GED program is required for this position.
- Two (2) years experience in a Customer Service environment (not to include fast food or retail customer service), to include one (1) year experience in Computer Applications, specifically Microsoft Office and data entry.
- Must have one year of experience working with a multi-line phone system
- Strong customer service and organizational skills
- Excellent verbal communication skills
- Sensitivity to customers with diverse backgrounds and in stressful situations
- Ability to multi-task and work under pressure
- Versed and skilled in telephone etiquette
- Adaptable and flexible to respond to customer concerns and needs

2.2. Switchboard Operator Process

This position is to route customer calls to the appropriate destination within the One-Stop. This is done in a professional and friendly manner at all times, regardless of any circumstances. There must be someone in this function at all times during hours of operation.

2.3. Switchboard Operator Script

All calls should be answered as follows:

- New Mexico Workforce Connection _____ County One-Stop.-This is _____, how may I help you. Transfer to correct office/staff
- If there is no response then state that you are unable to reach the party and give the caller the option of leaving a message or voicemail.

2.4. Switchboard Operator Table Chart

Questions or concerns regarding Unemployment	Call should be transferred to the UI Profiling Staff member.
Wanting to speak to a specific advisor or facilitator	Call should be transferred to the individual advisor or facilitator at the appropriate extension.
Employer inquiring about the Center and our services	Call should be transferred to the Business Team Member at the One Stop Center.
Customer inquiring about attending training or obtaining Financial Aid for training.	Customer is encouraged to visit the One Stop Center on a light traffic day to complete the Welcome Team process. Customer should be informed of what documentation they should bring when they come (DL and a SS Card or a Birth Certificate).
Unemployment hearing information and Judges	Call should be transferred to the UI staff.
Work Keys Assessment	New customers should be referred to the Welcome Team on light traffic days to accomplish registration. Customer should be informed of what documentation they should bring when they come (DL and a SS Card or a Birth Certificate).

Section 3

Welcome Team Greeter

3.1. Greeter Functional Responsibilities

- Greet customers in a friendly, welcoming professional manner.
- Determine the purpose of customer's visit and direct accordingly.
- Answer questions about the NMVOSS Center's services and resources, as well as other community resources.
- Provide clerical and administrative support to the Welcome Team in a confidential and professional manner.
- Issue scan cards to customers and explain to customers how these cards will be used and other resources available that identify customers documented identification.
- Assist with data entry and special projects as needed.
- Serve as backup to Switchboard operator and Career Development Expeditor.
- Other clerical duties as assigned.

Qualifications:

- A High School Diploma or successful completion of the GED program is required for this position.
- Two (2) years experience in a customer service environment to include one (1) year experience in computer applications, specifically Microsoft Office and data entry.
- Strong customer service and organizational skills
- Excellent verbal communication skills
- Sensitivity to customers with diverse backgrounds and in stressful situations
- Ability to multi-task and work under pressure
- Versed and skilled in telephone etiquette
- Adaptable and flexible to respond to customer concerns and needs

3.2 Greeter Process

A friendly smile and warm pleasant greeting when customers arrive will create a good atmosphere and make them feel welcome and make for a pleasant experience. Remember to treat others as you would like to be treated.

Never leave customers waiting without an explanation, an apology, or an offer to help.

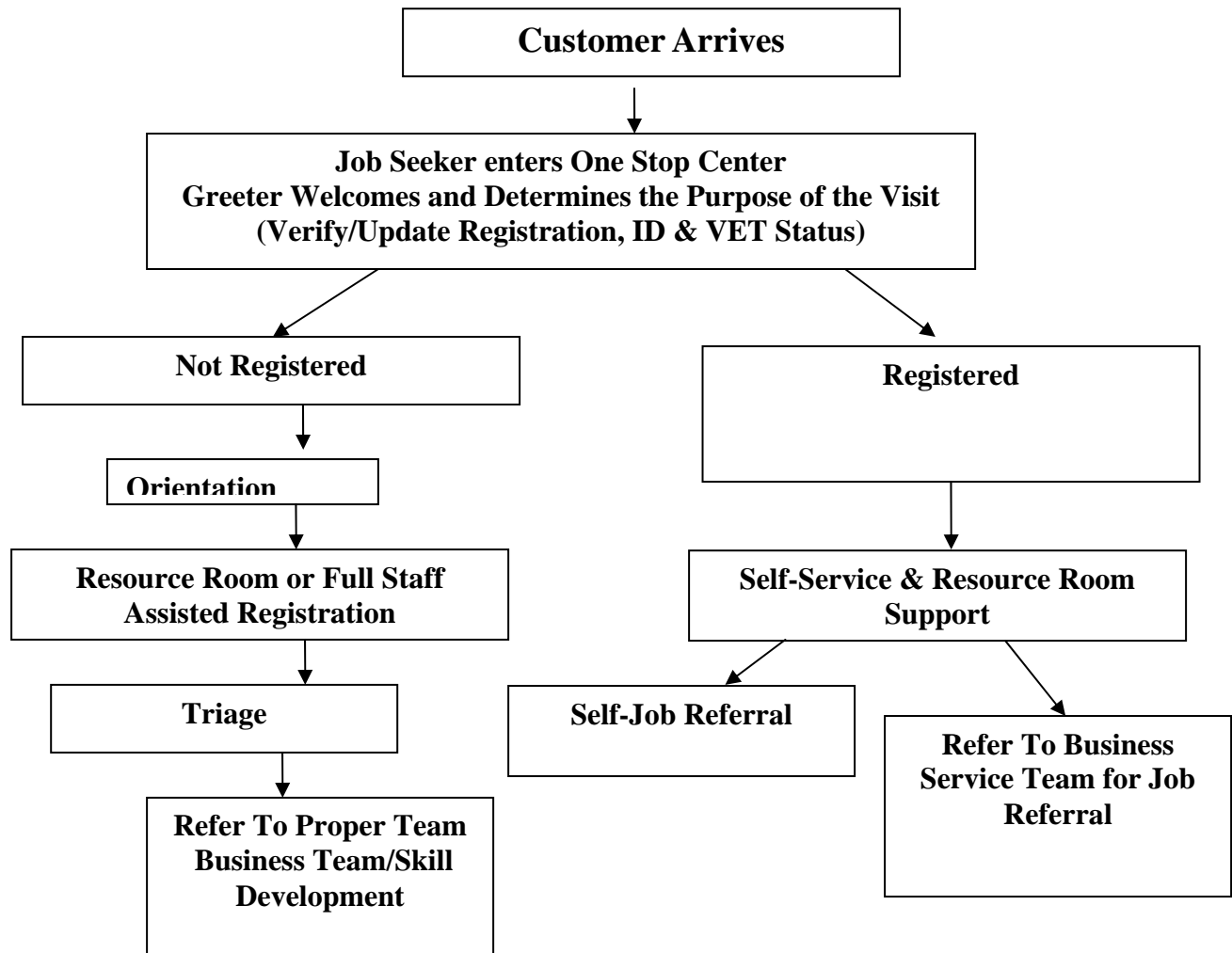
ACKNOWLEDGE: give waiting customers a smile or other friendly gesture to indicate that you have seen them if you are busy and cannot deal with them immediately. **REASSURE:** waiting customers that they will be dealt with soon, name the person who will do so and apologize for the delay.

1. The first point of contact for all customers of the NM Workforce Connections Center happens at the reception area or front desk.
2. Greet the customer in a friendly manner. Ask customer to sign in to New Mexico Workforce Connection sign-in sheet. The greeter will ask two key questions to begin the services; first, what can I help you with today? Second question, are you register in our (NMVOSS) system? These questions will help the greeter identify the customer needs and direct them to

the appropriate team or services.

3. The Welcome team greeter will direct these returning customers to their appropriate destination; using internal processes, calendars and schedules.
4. The greeter will also verify registration and current resume in the NMVOSS. To include Veteran documentation.

3.3 Greeter Flow Chart



3.4. Resource Room Greeter Script

Hello! My name is _____, how may I assist you.

Customer is then informed of the amount of time it will take for him/her to be served.

- Assessment
- Triage
- Workshop Information
- Triage/Assessment

If a barrier exists that will prevent the customer from completing the Welcome Team intake process (triage/assessment) on the day of their visit such as children, transportation and or an accommodation for special services, sign language etc., offer the customer an appointment time that would better meet their needs.

Schedule an appointment with the customer on a day when traffic in the center can accommodate the welcome team intake requirements assuring that customer receives a complete orientation and common measures are met.

3.5 Service Information:

Confirm identification and required documentation confirming identification assuring that we are servicing the right customer.

3.6 Identify Purpose of Customer Visit:

If a customer is a returning customer, likely scenarios for their return visit are going to be:

- Unemployment Information, filing or resolving an issue
- Appointments such as UI hearing, UI auditors etc.
- Job Search assistance
- Register with the Welcome Team
- Appointment to see a member of the Business or Skills Team
- Attend a workshop or group activity
- TANF or Food Stamp services and assistance
- Individual Assessment
- Veteran Services
- TANF Grant programs
- Reset password for self-services

3.7 If Registered, the greeter will verify in the individual information in the NMVOSS system, make appropriate annotations in the NMWC Data Entry Form, job referral etc.

- Identify/verify individual is a VET, resume is on file in the system
- Assist customer and provide Resource Room Service Support as needed
- Self Referral – assist customer with Website Application Process
- Refer customer to Business Service Team for NMVOSS job referral or resume preparation
- Refer to the Skills Team

3.8 If not registered, greeter will provide orientation to jobseeker

- Staff assist customer in NMVOSS Registration

- Resource Room Staff performs Triage functions, reviews self assessment form and proceeds with interview (See Triage Overview Customer/Self-Assessment Form)
- Based on the Triage outcome, refers customer to the Business or Skill Assessment Team

3.9 Assessment Self-directed or Staff assisted

This form will give welcome team staff a clear picture of who can self register and then see the CDE for full registration in order to be co-enrolled, or see the CDE for one-on-one assistance to complete NMVOSS co-enrollment. See Section 4 for assessment form.

3.10. Welcome Team Greeter NMVOSS Snap Shot Register Screen1, see attachment 3.

3.11 Welcome Team Greeter NMVOSS Snap Shot Register Screen 2, see attachment 3.

3.12 Welcome Team Greeter NMVOSS Snap Shot Register Screen 3, see attachment 3.

3.13 Resource Center Computer Resources Guidelines

- Computers are only to be used for job search/unemployment activities.
- If you are found not using the computer for job search/unemployment activities, you will be asked to leave the website you are in. If you continue to access inappropriate websites, you will be asked to leave the center.
- If you borrow a pen, please return it to the Front Desk.
- Please clean up your area and place the chair under the table after you finish using the computer.
- On a daily basis, delete cookies, files and history from the computers internet files. This will help maintain computer efficiency.

Section 4

Welcome Team Career Development Expeditor

4.1. Career Development Expeditor Functional Responsibilities

The main function of the Career Development Expeditor is to get a clear picture of customer's transferable skills and abilities that meet the demand of the labor market. During the one-on-one process, the customer will be assessed for basic skills and discuss with the CDE all information to allow the CDE to co-enroll the customer in Wagner-Peyser and WIA performance.

- Set up and facilitate assessment activity and analyze assessment results.
- Record assessment and services provided in NMVOSS, including entry of case notes to document customer interactions
- Based on assessment information, refer customers as appropriate to the Skills Team or the Business Team
- Assist customers through each step of the Welcome Team process
- Serve as backup to switchboard operator and greeter as needed
- Other duties as assigned

Qualifications:

Associate Degree or higher in one of the following fields of education – Social Work, Education, Counseling, Psychology or Sociology from an accredited college/university (current employee's to be grandfathered in)

- Minimum of three years professional work experience in the workforce development system
- Ability to work as a member of a functional team that provides employment and skills development services to job seekers
- Knowledge of skills and aptitude assessment tests and ability to interpret and analyze test results.
- Ability to conduct customer interviews seeking information that will assist in the identifying service needs
- Ability to accurately and efficiently enter records into a management information system
- Ability to work with diverse populations with diverse backgrounds
- Strong customer service and interpersonal skills
- Excellent verbal and written communication skills
- Skills in multi-tasking and ability to efficiently produce accurate work under pressure
- Ability to work both independently and as a part of a team

4.2. Career Development Expeditor Process

The main function of the Career Development Expeditor (CDE) is to get a clear picture of customer's transferable abilities and skills to meet the demand of the labor market. During the one-on-one process, the customer will be assessed for basic skills and discuss with the CDE all information to allow them to be co-enrolled becoming active clients of Wagner-Peyser and Work Investment ACT (WIA) performance.

The CDE will create an Individual Plan (IP) case note in the NMVOSS, The case note information will be ascertained from the one-on-one interview with client. This information is used to make a determination in referring the customers to the Skills, Business teams or a combination of both.

The interview process:

Specific Questions may be asked of the customer, as appropriate, in order to gain a better understanding of the customers’ skill levels and goals and to assist in making the appropriate referral to the Business Team, Skills Team or both.

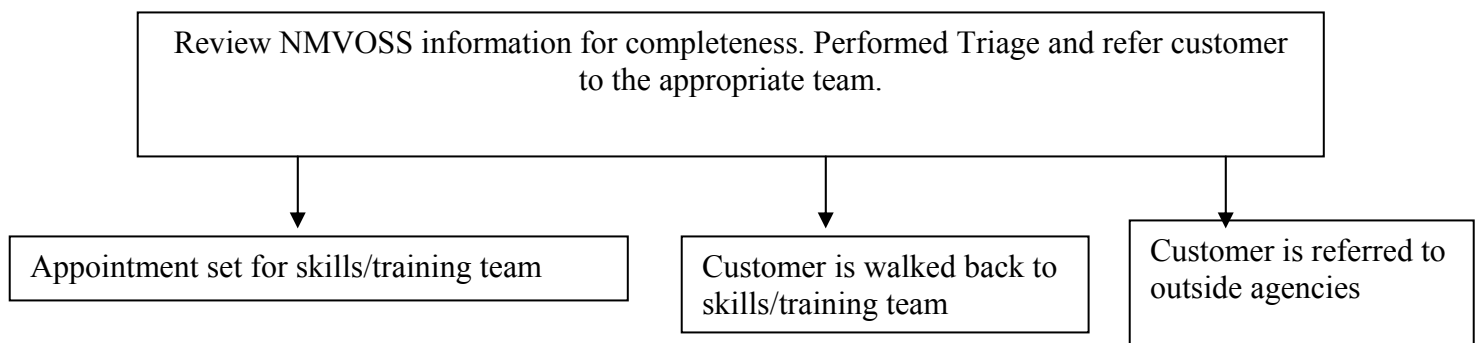
The IP process:

The IP uses a format that may be typed or copied and pasted into NMVOSS “Client Notes” screen. After the format is entered in the blank screen, information from the initial assessment should be recorded as follows:

1. Employment Goal- Record customers’ employment goal that was established during the interview. If customers are unable to establish a goal they should be directed to the Skills or Business teams for further career decision making.
 - a. Document that customer is unable to identify their employment goals at this time.
2. Record customer’s certification if you have verified certificates and or degrees client stated that they have received.
3. Record the next Teams selection and why.

Based on the assessment results customer is directed to Skills Team to identify transferable skills.

4.3 Career Development Expeditor Flow Chart



4.4 Career Development Expeditor Script

The CDE will conduct a one-on-one interview with the customer and concurrently enter required information into NMVOSS assuring co-enrollment in WP/WIA services.

1. The CDE will ask questions to collect the necessary information to make a determination of services needed. Specific questions may be asked of the customer, as appropriate, in order to gain a better understanding of customer’s skill levels and goals and to assist in making the

appropriate referral to the Business or Skills Team.

2. Questions should focus, on the following seven issues that will help make a quality referral to Business Team, Skills Team or both.

These seven issues include:

- What brought the customer in the office?
 - What is their perceived need for employment and skills development services?
 - What job goal does the customer have?
 - What is the customer's work history?
 - What are the customer's barriers to skill development or employment activities?
 - What is the customer's educational history (current diplomas and certifications as well as those certifications that may be needed)?
 - Has the customer participated in a workshop and/or been issued a marketable skills waiver?
3. At the completion of the NMVOSS registration activity, the NMVOSS system will indicate to the CDE which programs the customer may be eligible.
 4. Once the application is complete, the Welcome Team Advisor will then report an initial service and enter an enrollment case note in NMVOSS.

4.5 CDE One on One Summary of Triage Directed to next Team

Initial Contact: Upon referral from the greeter, the CDE introduces himself or herself to the customer in a friendly and professional manner.

1. Hello! My name is _____. I am here to assist you.
2. The customer is then informed of the amount of time that is required for the first visit. Your initial visit will take approximately 30 minutes.
3. During this appointment we will take a quick look at your skills and complete a short interview process. Everything that we learn will be used to help us serve you better.
4. If a barrier exists that will prevent the customer from completing the CDE process on the day of their visit (i.e. they have children with them or have transportation issue), an appointment time will be offered.
 - a. The CDE will schedule an appointment with that customer for a later date. Appointments should be scheduled for days when traffic in the Center is lighter.
 - b. The CDE will provide the customer with an appointment card that also reminds the customer of the documentation they will need to bring to the appointment to complete the process.

4.6 CDE Self Assessment and or Staff Assisted Form:

NAME:		Last 4 SSN:	DATE:
EMPLOYMENT ISSUES THAT SHOULD BE CONSIDERED (EXPLAIN BARRIER)			
LACK OF TRAINING			
CHILD CARE:			
TRANSPORTATION:			
FAMILY ISSUES:			
EDUCATION LEVEL (GED, HS, AD, ETC.)			
OTHER			
EMPLOYMENT GOALS:			
JOB CHOICE ONE:			
SKILLS IN THE ABOVE AREA YOU ALREADY HAVE:			
JOB CHOICE TWO:			
SKILLS IN THE ABOVE AREA YOU ALREADY HAVE:			
OTHER SKILLS:			
STEPS TAKEN TO FIND EMPLOYMENT: (I.E Spot jobs, staffing agencies.)			
JOB SEARCH ASSISTANCE (CHECK ANY THAT APPLY)			
COMPLETING RESUMES OR COVER LETTERS	IMPROVING JOB INTERVIEWING SKILLS		
USING THE PHONE IN JOB SEARCH	KEEPING A POSITIVE OUTLOOK DURING JOB SEARCH		
FINDING JOB LEADS	IDENTIFYING JOB SKILLS		
COMPLETING JOB APPLICATIONS	OTHER (EXPLAIN)		
JOB CHOICE (CHECK ANY THAT APPLY)			
I AM UNSURE OF MY EMPLOYMENT GOALS	I NEED MORE INFORMATION ON OCCUPATIONS		
I NEED INFORMATION ABOUT THE LABOR MARKET	I NEED TRAINING AND EDUCATIONAL INFORMATION		
I NEED TO EXPAND MY JOB CHOICES	I NEED TO NARROW MY JOB CHOICES		
I NEED HELP TO IDENTIFY MY INTERESTS	OTHER (EXPLAIN)		
JOB RETENTION (CHECK ANY THAT APPLY)			
I NEED HELP IN KEEPING A JOB	I NEED HELP IN GETTING ALONG WITH CO-WORKERS		
OTHER (EXPLAIN)			
ARE YOU CURRENTLY INVOLVED WITH			
VOCATIONAL REHABILITATION	CONTACT PERSON	PHONE	
TRAINING PROGRAM	CONTACT PERSON	PHONE	
OTHER AGENCY	CONTACT PERSON	PHONE	
SIGNATURE			DATE
REFERED TO:			

4.7 CDE Direct to Next Team Work Sheet

Purpose: The purpose of this document is to provide a guide for directing customers to an appropriate Team.

Instruction: Use assessment results to direct customers' to the next Team or Teams. Below are examples for providing direction.

Skills Development Team

- No employment opportunity for goal, probable chance for success, or self-sustaining wage for goal
- Needs comprehensive assessment (e.g., occupational skills, soft skills, supportive skills, referral to another partner, etc.)
- Has career readiness skill levels necessary for employment goal and needs to take WorkKeys
- Needs skill building to attain identified career readiness skill levels for employment goal and take WorkKeys
- Has necessary career readiness levels for employment goal, but wishes to work on increasing skills and earn higher level CRCs
- Needs more intensive career decision making

Business Services Team

- Selected goal has employment opportunity, self-sustaining wage, and there is probable chance for success
- Has necessary work history and/or certificate/license in goal and doesn't wish to take WorkKeys
- Has necessary career readiness skills for employment goal and desires to seek employment
- Has necessary career readiness skills for employment goal, taken WorkKeys earning necessary credentials and is now seeking employment in goal

Skills Development Team and Business Services Team

- Desires to seek employment in employment goal, but wishes to increase career readiness skill levels and/or attain CRCs while seeking employment and/or working

4.8 Referral to Business or Skills Team:

Once the interview has been completed, the CDE is now ready to make a decision on whether the customer should be referred to the Business Team or the Skills Team. This decision should be based on the CDE evaluation of the following factors:

1. The customer's need for additional certifications to acquire employment.
2. The customer's need to acquire additional skills to secure employment.
3. The customer's financial needs and circumstances.
4. The customer's assessed need based on their work history, educational background, Key Train assessment scores, and identified barriers to employment.
5. Whether the customer has been issued a TANF waiver for marketable skills or for future training activities.

Once a decision is reached on which team the customer is to be referred to, the Welcome Team Advisor will use one of the following referral strategies to engage the customer in Work Force activities.

- If a Business or Skills Team Member is available, the Staff member can walk the customer back and introduce the customer to the team member. This will constitute immediate engagement with the customer because the team member can immediately connect the customer to appropriate services.
- If a Business or Skills Team Member is not available or the customer is out of time, the customer can return and meet with a specific individual on the Business or Skills Teams as appropriate. The Welcome Team member gives the customer the option to wait for the next available staff or to come back at a later time.
- If a Business or Skills Team Member is not available or the customer is out of time, the Welcome Team Member gives the customer the option to wait for the next available staff or to return back at a later time, to meet with a specific individual on the Business or Skills Team and schedule the customer for an appropriate workshop.

4.9 Data entry into NMVOSS:

Welcome Team members will take an activity action and case note when registering individuals that use the Resource Center equipment; this includes use of computers, facsimile machine and/or copier support. Additionally, Staff members providing resume and/or Internet support to customers will make a case note on customers' records. Employer interviews and UI classes are classified as workshops. Below table shows the common activity codes the Welcome Team will be responsible for inputting into the NMVOS system; see attachment 5 for detail activity snapshots:

Activity Number	Activity Description
101	Orientation
102	Initial Assessment
104	Workshops and Job clubs
106	Provided Internet Job Search Support / Training
115	Resume Preparation Assistance
120	Use Of One-Stop Resource Room / Equipment

4.10. Data entry into NMVOSS snap shot Activities, Screen 1:

New Mexico Workforce Connection - Services - Microsoft Internet Explorer

Address: https://www.jobs.state.nm.us/staff/servchk_details.asp?usern...

New Mexico Workforce Connection

Workforce Info

Home

Currently Managing
LOPEZ, GUILLERMO M
Assist a new Individual

* LWIA / Region: Eastern

* Office Location: None Selected

* Position: Staff

	Scheduled Date	Scheduled Time	Service Description	Actual End Date
<input type="checkbox"/>	12/09/2008	00 : 00 AM	109 - Case Coordinated Services	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	101 - Orientation	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	102 - Initial Assessment	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	104 - Workshops and Job clubs	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	106 - Provided Internet Job Search Support / Training	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	107 - Provision Of Labor Market Research	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	108 - Follow-Up Services / Counseling	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	110 - TAA Follow-Up Services	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	115 - Resumé Preparation Assistance	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	116 - Received Service From Staff Not Classified	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	118 - Failed To Respond To Call-In	
<input type="checkbox"/>	12/09/2008	00 : 00 AM	120 - Use Of One-Stop	

My Workspace
My Staff Resources
My Staff Account

Services for Staff
Manage Individuals
Manage Employers
Manage Resumés
Manage Job Orders
Manage Labor Exchange
Manage Activities
Manage Scan Card
Manage Case Assignment
Manage Profiling
Manage Communications
Manage Follow-Up and Surveys
Manage Providers
View Reports

Other Staff Services
Staff Online Resources
Dynamic Works Staff Courseware

Quick Menu

Done Internet

4.11 Data entry into NMVOSS snap shot Case Note, Screen 2:

https://www.jobs.state.nm.us - Case Notes - Microsoft Internet Explorer

Please check to suppress this Case Note

* Contact Date: 12/09/2008 Today

* Program: Wagner-Peyser

* App ID: 956830

* LWIA: Eastern

* Office: CC - Clovis Comm College

Partner Program: None Selected

* Subject: Resource Center

Contact Type: Face-to-Face

* Case Notes: Assisted Individual in resource center operations. Provided Orientation on NMVOS website.

[Spell Check]

Create Date:
Edit Date:
Staff User ID:
Staff Edit:

Save Cancel

4.12 Co-enrollment into WIA:

The concept of the Welcome Team is to provide fast customer service and direct individuals into core activities and/or intensive case management services. Based on this concept, the Welcome Team will have the initial flow of individuals entering the One Stop Center; the process of co-enrolling into WIA is long and will increase the processing time of each individual. To accommodate WIA enrollment, the Skill or Business Team will be responsible to input individuals into the WIA NMVOSS database. The NMVOSS Database IT team is working in upgrading the software program to streamline the co-enrollment function. The expected date of implementation is Jun 2009.

Section 5 Welcome Team Flyer

5.1 Welcome Team Orientation Flyer for One-Stop

ORIENTATION

One Stop Centers are a statewide network of conveniently located centers that each provide employment, education, and training services to both individuals and employers, all in one place. These centers include programs such as Job Services, Vocational Education, Vocational Rehabilitation, and Youth services through a partnership with local, state and national organizations.

SERVICES FOR INDIVIDUALS

The services available at each One Stop Center are designed to meet the requirements of the Workforce Investment Act (WIA). Most One-Stop Centers provide tiers of services: core services, intensive services, and training services. Your One Stop may provide one or all of these tiers, depending on the local design and the partners involved in the center.

CORE SERVICES: These services include job search and placement assistance (including career counseling); labor market information; initial assessment of skills and needs; information about available services; and follow-up services for those who have been placed in jobs. Core services also include self-access and informational services that may be available in resource rooms or online, including:

- **Self-access assessment and career planning tools** – Including interest and skill inventories, informational videos on career choices, and software to help write resumes.
- **Labor market information** – Including unemployment rates and projected employment trends within the area, state and nationally; current and projected wages for specific occupational fields; and listings of employers in specific industries.
- **Job listings** – either computerized or on paper.
- **Electronic resume banks** – Where you can post your resume for viewing by employers.
- **Information about education and training providers** – Including libraries that contain brochures, course catalogues and applications for educational institutions in your area. Many centers also provide information about institutions that provide training for specific careers.
- **Tutorial programs** – Including computer-based instruction in skills such as typing, or using computer software programs.
- **Office support products and services** – Such as telephones, copiers, fax machines, word processors and printers, enabling users to respond immediately to job leads they find when accessing other center services.

6. Welcome Team One-Stop Training Guide

The Welcome Team is the first entry point for the customer coming in to the New Mexico Workforce Connection. Items that the staff must be prepared to do is the knowledge on how the NMVOSS Website works and what a powerful tool it is in helping the customer become marketable in today's employment world.

New Welcome Team Staff members must understand how the Individual NMVOSS operates to assist the customer. First step is to use the Virtual Quick reference in learning how to use the database, second know how the My Individual profile screens work and third be familiar with the centers core services and programs.

Task Number	Task, Knowledge and Other References	Start Date	Trainee Initials	Trainer Initials	Completion Date
1.	Virtual One Stop (VOSS) Quick Reference Individual				
2.	VOSS Quick Reference Staff User				
3.	VOSS Log In				
4.	VOSS My Work Space				
5.	VOSS Staff Services				
6.	VOSS Other Staff Services				
7.	Important Things you can for Individuals in VOSS				
8.	Important Things you can do for anyone in VOSS				
9.	Perform Fax machine Operations				
10.	Perform Copier Operations				
12.	Resource Center Operations (Workshops, Cargill, Employers, Census)				
13.	Provide Orientation Brief				
14.	Monitor computers				
15.	Clean Computer Drives				

16.	Identify customer needs and refer to appropriate teams				
17.	TANF/Food Stamps Forms				
18.	TANF/WIA/FS Time Sheets				
19.	Employment Applications				
20.	Review Schedule/Appointment log				
21.	Perform Telephone Operations				
22.	NMVOSS Data Entry				
23.	Assist Individual				
24.	Activity Code Input				
25.	Case Note Input				
26.	Issue Transportation Passes				
27.	Language Help Line				
Trainee Name/Initials					
Trainer Name/Initials					

Acronyms List

CDE – Career Development Expeditior

FS – Food Stamp

NMVOS – New Mexico Virtual One-Stop

TANF – Temporary Assistance for Needy Families

WP – Wagner-Pyser

WIA – Workforce Investment Act

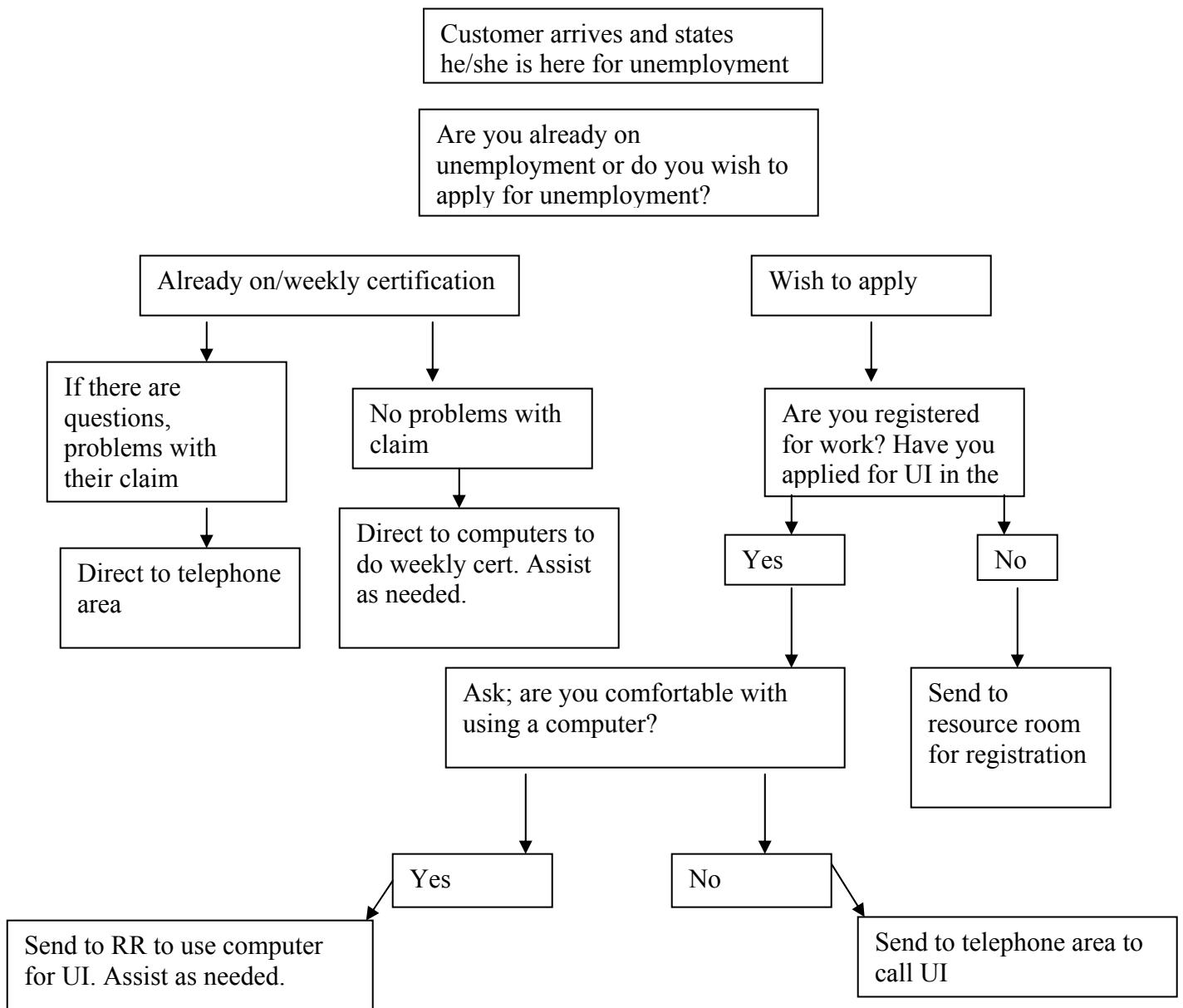
**Attachment 1
Welcome Team Workshops**

1.1 One Stop UI Process

The customer states that he/she is here for unemployment

- If customer is already receiving unemployment, and there are no questions or problems with their claim then direct customer to computers <https://uiclaims.state.nm.us>
- If customer has questions and or problems with their claim direct to UI telephone area. 505-841-2000 or 505-841-4000 and assist as needed.
- Welcome Team UI Profiling Full registration with co-enrollment if not completed in the Welcome Team

Welcome Team UI Customer flow Chart



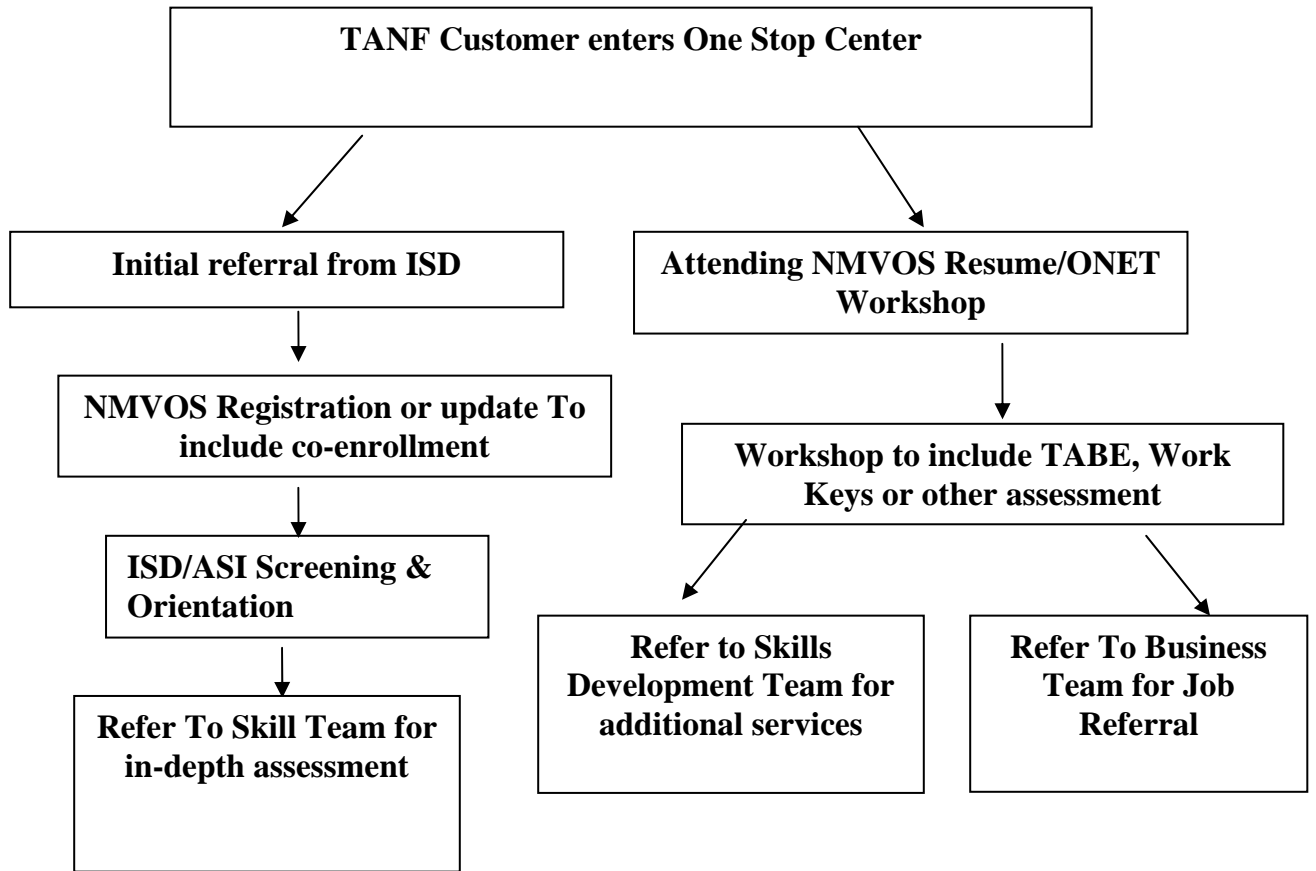
1.2. Welcome Team TANF Process

The service provider must conduct comprehensive integrated participant services. These services must comply with federal and state regulations for the Temporary Assistance to Needy Families (TANF), other cash assistance, and Food Stamp (FS) Employment and Training (E&T) Programs. Program requirements are defined in the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA), Deficit Reduction Act (DRA), NMW Act, Education Works Act, TANF State Plan, TANF Work Verification Plan (WVP), Food Stamp Act, E&T State Plan, and the New Mexico Administrative Code (NMAC). The contractor agrees to provide integrated participant services for TANF Cash Assistance, Other Cash Assistance, and FS E&T, participants.

Case management is a collaborative process that outreaches, assesses, plans, implements, coordinates, monitors, and evaluates the options and services required to meet an individual's employment goals and needs, using communication and available resources to promote quality outcomes. The working title for all case managers must be Career Development Specialist (CDS).

1. TANF Client enters One Stop Center Receptionist welcomes and determines the purpose of the visit.
 - A. **Refer by ISD:** The client will have an appointment to attend an initial screening with TANF counselors. At this time the client will register in NMVOS or if registered, client will need to verify/update personal information. After NMVOS completion, the client will receive an orientation of all the programs available and perform an assessment to identify barriers and/or skill information.
 - B. **After completion of assessment:** The client will be referred to the Skill Development Team/Case Manager for additional services. At this time the TANF Initial counselor will make the appropriate activity and case notes to co-enroll client into the NMVOSS.
2. TANF Clients are referred to a workshop (Resume/ONET) at the center. After completion of the workshop, the facilitator will refer the client to the Skill Development or Business Team as appropriate.
3. **Welcome Team TANF Full registration with co-enrollment,** To be completed by TANF Cuss's if not already previously done.

Welcome Team TANF Flow Chart

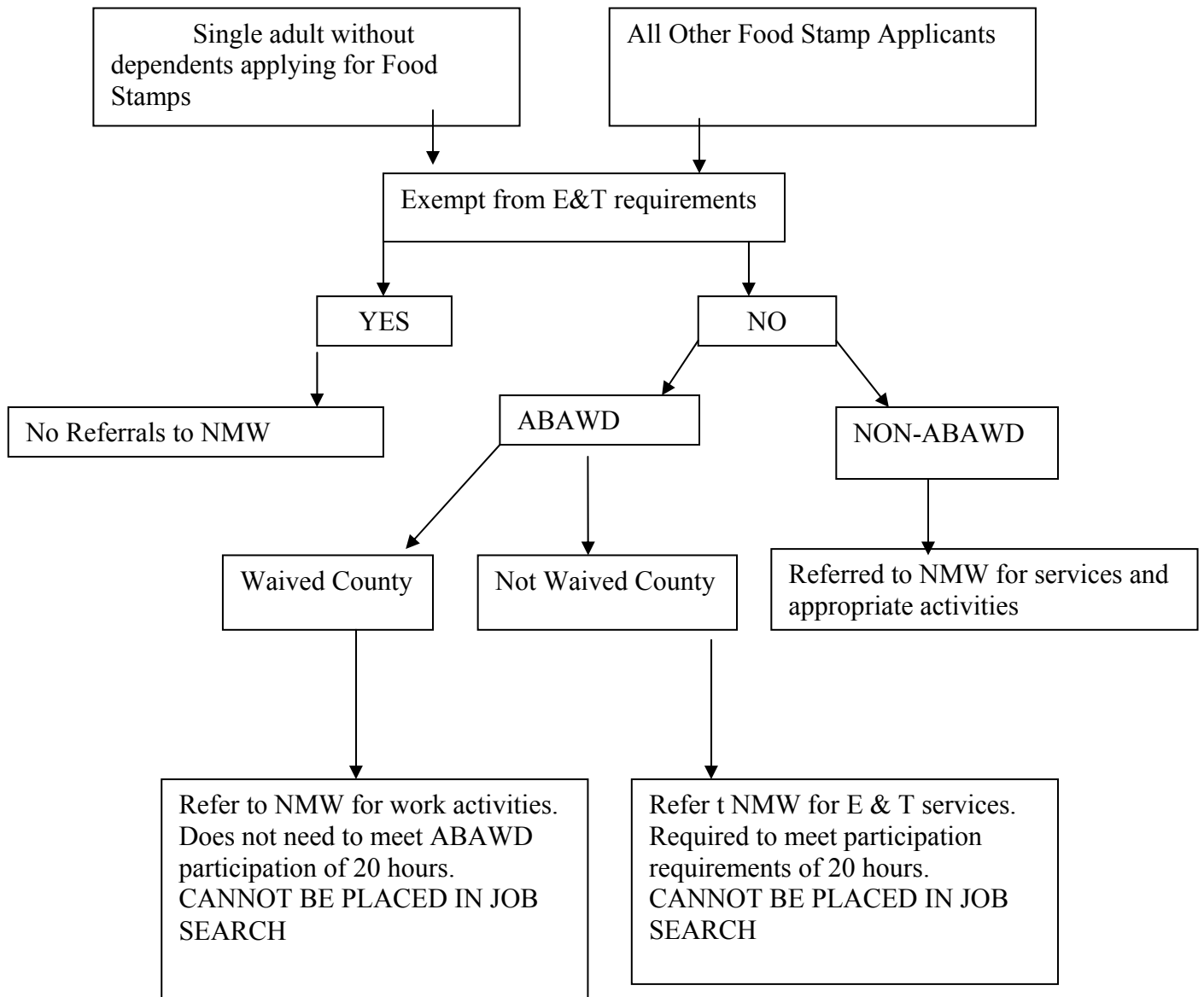


1.3 Welcome Team E&T (Food Stamp) Process

Case management is less intense for the FS E&T population; however, it must be provided as needed for FS E&T participants ongoing. The barriers screening is not required for FS E&T participants; however, the service provider shall ensure that FS E&T participants who disclose a barrier must be referred to an appropriate service provider or community provider for services.

- The In-Depth Barriers Assessment and the Special Requirements for DV referrals are not applicable to FS E&T population. However, the service provider shall ensure that FS E&T participants who disclose a barrier be referred to an appropriate service provider or community provider for services.
- IRP and WPA requirements are the same as in TANF.
- Those FS E&T participants who are also required to participate in the TANF NMW program will satisfy the FS E&T participation requirements when they comply with TANF. Similarly, TANF NMW non-compliance will subject a FS E&T participant to a FS E&T disqualification unless otherwise exempt from E&T.
- FS E&T participants must participate in work activities to the extent required by HSD and the service provider. A participant must engage in work activities after the first month following approval of benefits and every 12 months thereafter.
- E&T Participants must report to an employer if referred by ISD or its designee and accept an offer of acceptable employment or be disqualified from the FSP.
- ABAWDS – Failure of an ABAWD to meet the 20-hour a week work requirement (unless living in a waived or exempt area) for longer than three (3) full benefit months in a 36 month period as determined by HSD results in ABAWD ineligibility.
- Without good cause, failure to meet participation requirements or failure to report monthly attendance timely, may subject the E&T participant to an individual disqualification
 - First occurrence: until compliance or for three (3) months, whichever is later.
 - Second occurrence: until compliance or for six (6) months, whichever is later.
 - Third occurrence: until compliance or for one (1) year, whichever is later
- Welcome Team along with the FS, E&T Career Development Specialist will assure that client has received Full registration with co-enrollment, To be completed by FS, E&T CDS if not already done previously.

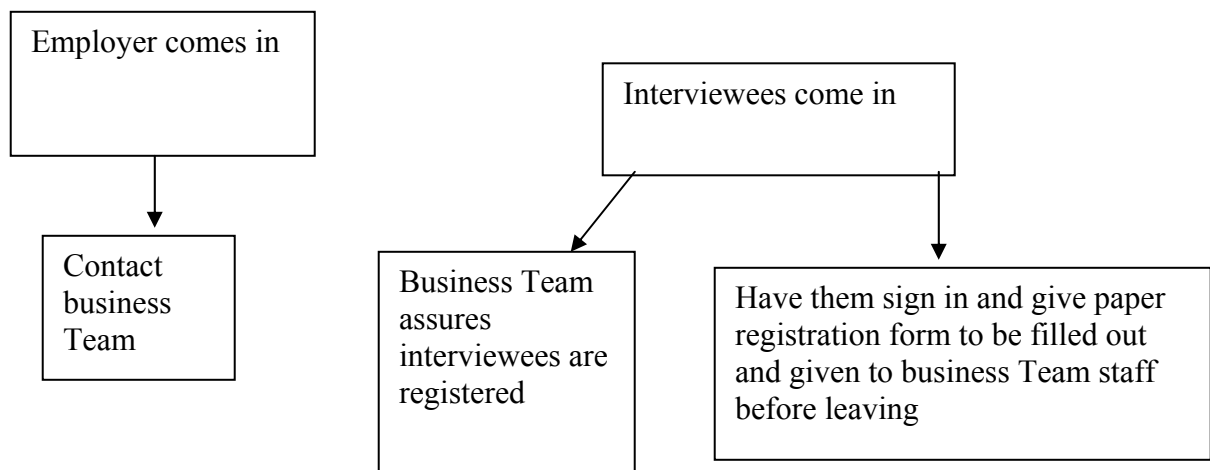
Welcome Team E&T Flow Chart



1.4 Welcome Team Job Fair Process

Employer and those seeking employment with the employer will be welcomed and the business Team notified of their presence either a copy of the application or the service information form can be used to assure that all interviewees are registered and services taken in the VOSS system.

Welcome Team Employer Interview Flow Chart



1.5 Welcome Team Veteran (DVOP/LVER) Process

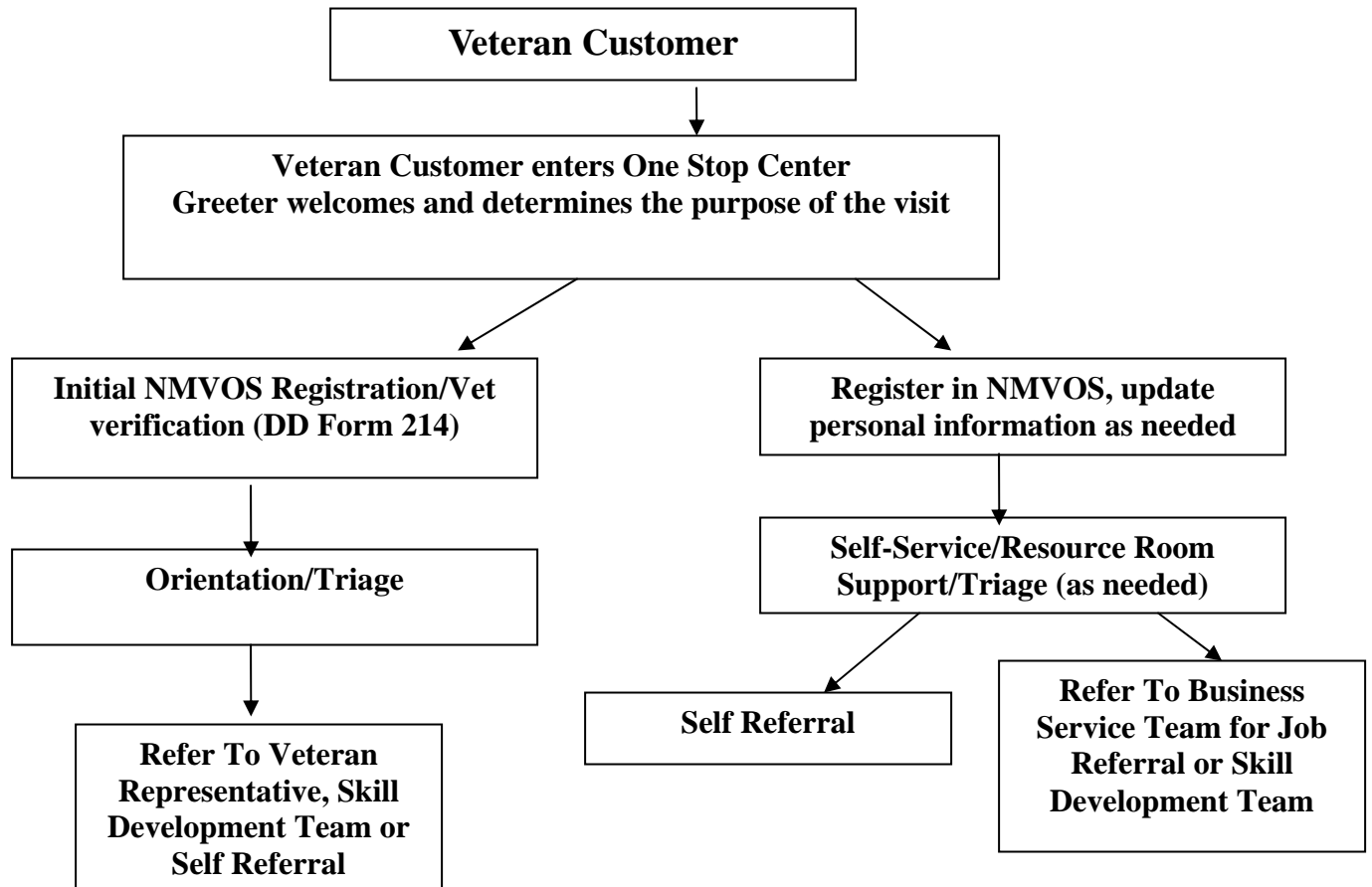
Disabled Veterans Outreach Program (DVOP) specialists provide intensive services to meet the employment needs of disabled veterans and other eligible veterans, with the maximum emphasis directed toward serving those who are economically or educationally disadvantaged, including homeless veterans, and veterans with barriers to employment.

DVOP specialists are actively involved in outreach efforts to increase program participation among those with the greatest barriers to employment which may include but should not be limited to: outplacement in Department of Veterans' Affairs (DVA) Vocational Rehabilitation and Employment Program offices; DVA Medical Centers; routine site visits to Veterans' Service Organization meetings; Native American Trust Territories; Military installations; and, other areas of known concentrations of veterans or transitioning service members.

The case management approach, taught by the National Veterans' Training Institute, is generally accepted as the method to use when providing vocational guidance or related services to eligible veterans identified as needing intensive services.

Welcome Team will assure that client has received Full registration with co-enrollment, if not already done previously.

Veteran Welcome Team Flow Chart 1



Veteran client enters One Stop Center; receptionist welcomes and determines the purpose of the visit.

- **Initial Registration:** The veteran will be directed to the resource room to register and Welcome Team staff will verify DD Form 214. Once this is accomplished, the expediter will provide an orientation and Triage the veteran to identify services. Once this is done, the expediter will send the veteran to the appropriate team or service.
- **Register:** The veteran will verify personal information and perform a self-referral service in the resource center. Based on the initial contact with the veteran, if the veteran address barriers or issues that may prelude him/her to performed self referral job services; the Welcome Team staff may need to perform Triage assessment to determine appropriate services for client. After the Triage assessment is accomplished; the client may be

directed to the Skill Development Team, Veteran Representative or workshop as determined by staff.

- **Veterans** have the right to see a Veteran Representative at any time for assistance in seeking employment or benefits information. Welcome Team services must be provided to ensure the veteran received the needed services prior to referring them to a Veteran Representative. Additionally, if the Veteran does not have a DD Form 214, a valid Veterans Administration (VA) Identification Card will meet verification status. Please contact your center Veteran employee to discuss how this process will work at your location.

Attachment 2:

Virtual One Stop (VOS) Quick Reference – Individual User

Logging In

If you don't have an account:

- Click the Home page graphic, the [Start here](#) or [Click here](#) links, or the [Not Registered?](#) link.
- Click [Register > Individual](#).
- Create a unique user ID and password.
- Fill in required (*) fields.

If you have an account:

- Enter your user ID and password.
- Click **Sign In** button.
- Click [Forgot Username and/or Password](#) to retrieve a forgotten ID or password.
- Select a desired retrieval option.

Settings and Themes

The ICC settings you select control system appearance and behavior. Click the [Settings](#) link at the bottom of most screens to access the Settings menu. ICC includes multiple “themes” or appearances. You can select a theme from the Settings page to fit your Internet or intranet connection and system use.

Web Theme – Includes graphics for typical system users. Best for average Internet or intranet connections.

Text Theme – For users who prefer no graphics or have a slow Internet or intranet connection.

Quick Menu

Job Search – Choose this shortcut to conduct a job search.

My Resources – Choose this shortcut to access the most commonly used tools for individuals.

Resume Builder – Choose this shortcut to create new resumes, or to edit and manage properties for any of your existing resumes.

My Individual Profile – Access, review and modify your personal, employment plan, search history, and self-assessment profiles.

Services for Individuals

Career Services – Research occupations, choose a career, and analyze your skills.

Unemployment Services – View information about unemployment compensation programs.

Job Seeker Services – Create resumes, employer letters, and job alerts, conduct job searches, research employers, and review job market trends.

Veteran Services – Find benefits for veterans and their dependents.

Education Services – Locate training providers, the programs they offer, and sources of financial aid.

Youth Services – Find career and job information for youth. Find information on student aid, apprentice programs, child labor laws.

Labor Market Services – View information about state or local labor markets.

Senior Services – Find job, community service, Medicare, AARP, nutrition, health, and well-being information for seniors.

Community Services – Find out about community services available to you and determine your eligibility.

Staff Provided Services – Learn about what services are available to you when you make a visit to your local One-Stop Career Center.

Financial Services – Create and manage a monthly budget, a training budget, and/or a transition budget.

Other Services

Message Center – View, and manage/delete your messages, and view your appointment calendar and manage appointments that have been recorded in your profile by either you or by a staff member for you.

Assistance Center – Find recommended services based on your needs, reference cards for system navigation, and how to contact staff.

How Do Employers Find You in VOS?

You must complete a resume. This allows system-registered employers to view it, and keep it active in order for employers to find you in Virtual OneStop. Employers may choose the following resume search options to find you:

- **Quick Search** – uses any combination of your desired work location, occupation, and salary; keywords found in your resume's title or employment history section; minimal education requirements; or the resume posting date.
- **Resume Ranking Search** – offers various search criteria for employers to choose from, such as occupational experience, driver's license info, and shift availability. Based on whether the employer requires or desires the criteria, the system will display matching resumes, in rank order, for the employer to review.
- **Other Search Options** – this option provides search by resume number, search by individual skill set (skills matching), search by employer job order requirements, and advanced search (resume ranking).

Note: *To get employers' attention, create resume titles that reflect your desired occupation, because employers can, and frequently do, use keyword searches.*

- To create a resume, click **Resume Builder** from the Quick Menu. See the *Using the Resume Builder* section in the Individual Services User Guide for details on creating and formatting a resume.
- To review resume writing tips, click **Job Seeker Services ▶ 10 Steps**.

Important Things You Can Do in VOS

How to Search for Jobs

- 1 Click **Job Search** from Quick Menu.
- 2 Select or confirm your desired work location.
- 3 Select search method
 - **Quick Search** – select any combination of search criteria and click **Search**
 - **Advanced Search** – click the [click here](#) link, select criteria and click **Search**
 - **Other Search Options** – Click **Continue** button, select desired option, provide search criteria and click **Search**).
- 4 Review results (if applicable).

How to Manage the Job Search Results

- 1 Use the legend below the job search table to interpret results.
- 2 Re-sort the job search results by clicking a desired column heading.
- 3 Change the number of rows per page to increase or decrease the total number of pages displayed.

For example: *Click **Salary** column to sort jobs with the highest paying, listed salaries at the top.*

- 4 To navigate one page at a time, click the forward or backward arrows.
-

Important Things You Can Do in VOS

How to Make VOS Search for Jobs Automatically

(Save as Virtual Recruiter – Job Alert)

- 1 Conduct job search (as documented above).
- 2 On search results screen, click **Save this Job Search**.
- 3 Type a title for this job alert.
- 4 Select how often to run.
- 5 Select notification method.
- 6 Enter expiration date.
- 7 Click **Save**.

How to Apply for a Job

- 1 From the job search results screen, click the desired job title link
- 2 Review the job order details.
- 3 Click Display more information on this job.
- 4 *For external jobs*, VOS opens a new browser window; follow Website instructions...

For internal jobs, VOS either displays:

- The preferred application methods (choose one), or
- A list of one-stop offices. If you completed your background info, click **Please Have A Staff Person Contact Me** for assistance.

How to Create a Resume

- 1 Click **Quick Menu ▶ Resume Builder**. Click **Create new Resume**.
Select employer accessibility type, resume type, enter a resume title, and enter a resume title. (This is Step 1 of the Resume Wizard).
- 2 From the Resume Layout Templates screen, click Skip this Step. I will use the current template. (This is Step 1 of the Resume Wizard).
- 3 Continue through each step of the Resume Builder, entering the Resume information (as shown at right).

- Step 3 – Education
- Step 4 – Occupational License – Certificate
- Step 5 – Employment History
- Step 6 – Honors & Activities
- Step 7 – Additional Information
- Step 8 – Skills
- Step 9 – Summary of Abilities
- Step 10 – Drivers License Information
- Step 11 – Desired Availability
- Step 12 – Occupation
- Step 13 – Desired Salary
- Step 14 – Desired Locations
- Step 15 – Objective
- Step 16 – Contact Information
- Step 17 – References
- Step 18 – Review Completed Resume (Change, Update contents or layout/template, delete-print-download-email)

How to Check Scheduled Events Sponsored by Your One-Stop Office

- 1 Click **My Resources ▶ Upcoming Events**.
- 2 Select the region, office, and event category (above the Events calendar/list).
- 3 Click the **Filter** button.
- 4 Select the Month, Year, and View.
- 5 Click a calendar date entry to view detailed information on an event.

How to Perform Skills Matching for Career Selection

- 1 Click **Career Services ▶ Career Explorer**.
 - 2 Click **Match Your Skills** to compile a list of job skills and personal skills to find occupations best suited for you.
 - 3 Click **Match Your Interests and Work Values** (if applicable) to find suitable occupations.
 - 4 Click **Match Your Occupation** to choose a new, related career.
-

Important Things You Can Do in VOS

How to Locate Source of Financial Aid

- 1 Click **Education Services** ▶ **Financial Aid for Training**.
- 2 Click a desired link to access details.

How to Update My Contact Information

- 1 Click My **Individual Profile** ▶ **Personal Profile**.
- 2 Change any information in your profile (except your user name) and click **Save Information**.

How to Provide Job Application Information to Assist Staff

- 1 Click **My Individual Profile** ▶ **Employment Plan Profile** ▶ **Job Application** tab.
- 2 Click the **Details** link for the job(s) you applied for.
- 3 Record your interest level, current job status, and any notes if applicable.
- 4 Click **Save**.

Using Your Profiles

Personal Profile – Contains your contact information and other personal information. Contains the following folders:

- **Contact Information** – Contains information required for account set-up, contact information, and account information.
- **Background** – Lists your job history, education, skills, and other information used in resumes. Click the **Background Wizard** button to help you complete your resume.
- **Activities** – Contains questions directing you to activities that will assist you in your job search.
- **Memo** – Stores notes or tasks you want to accomplish.

Employment Plan Profile – Contains your resume, employer letters, job application details, your online application, and job alerts. Contains the following folders:

- **Resumes** – Contains the resumes you have created and allows you to create new resumes.
- **Letters** – Contains any employer letters you have created. Allows you to create new cover, follow-up, and acceptance letters.
- **Job Applications** – Contains a list of jobs you've applied for, and allows you to assist staff by indicating your interest level, your current job status, and any notes related to the job opening.
- **Online Application** – Contains an employment application based on your background information.
- **Virtual Recruiter** – Contains the job search agents you have created so the system may automatically conduct job searches on your behalf.

Search History Profile – Lists information you have found about occupations, training programs, and employers, along with job listings you have researched. Contains the following folders:

- **Occupations** – Maintains the occupational details you previously viewed, and permits new research.
- **Programs** – Lists training programs you have researched. Allows you to research new programs.
- **Employers** – Allows you to research, store, and retrieve information about employers of interest.
- **Jobs** – Maintains the job openings you previously viewed and permits new job searches.
- **Memo** – Stores notes or tasks you want to accomplish.

Self Assessment Profile – Contains your job skills, personal skills, work interests, work values, and WorkKeys® assessment (if applicable). Contains the following folders:

- **Job Skills** – Lists the job skills you previously recorded.
- **Personal Skills** – Lists the personal skills you previously recorded.
- **WorkKeys** (optional) – Lists the WorkKeys Assessment results previously recorded.
- **Interests** – Lists the work interests you previously recorded.
- **Work Importance** – Lists the work importance you previously recorded.

Attachment 3:

Virtual One Stop (VOS) Quick Reference – Staff User

Logging In

If you don't have an account:

- See your manager to have an account set up.

If you have an account:

- Enter your user ID and password on the home page.

My Workspace

My Staff Resources – Choose a shortcut to the most commonly used staff tools.

My Staff Account – Access this option to modify your staff profile, including contact information.

Staff Services

Manage Individuals – Create an individual user account or assist an existing individual.

Manage Case Assignment – Use any of the case assignment tools or view a case load.

Manage Employers – Create an employer user account, assist an existing employer, or modify their system access rights.

Manage Profiling – Manage UI claimant information and the orientation letters select individuals will receive.

Manage Resumes – Create or search for candidate resumes within the system.

Manage Activities – Manage service plan information for a desired individual or employer; manage the Events calendar for individuals, employers, and staff.

Manage Job Orders – Create or manage internal jobs; search for internal or external jobs.

Manage Communications – Manage messages, appointments, correspondence letters and system alerts on behalf of the customers you serve.

Manage Labor Exchange – Create job referrals for individuals and candidate referrals for employers; enter referral results; review pending referral requests; manage your custom job skill sets (for resume searches, posting jobs, and/or searching for individuals); manage criteria to control the display of external jobs in the system.

Manage Providers – Manage provider programs, services, and contracts (Advanced IFT only) for program enrollment selection.

View Reports – Generate detailed activity and management reports.

Other Staff Services

Staff Online Resources – Develop and maintain a directory of staff member resource information using the Content Management tool in Admin.

Dynamic Works Staff Courseware – Access professional online courses developed for the improvement of workforce staff members.

Important Things You Can Do for Employers in VOS

<p>Modify Employer Account Status (<i>Enable, Disable, Revoke, or Lock Out Employer</i>)</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select <i>status</i> search criteria and click Search; review search results. • Click link displayed in <i>Access</i> column ▶ select new status ▶ type comments ▶ click Save Changes.
<p>Modify Internal Job Order Details</p>	<ul style="list-style-type: none"> • Click Manage Job Orders ▶ Manage Internal Jobs. • Search for, select, and review the desired job order. • Change the staff status or other information as appropriate.

Important Things You Can Do for Employers in VOS

<p>Reset Employer Login Data via Email Notification</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select search criteria ▶ click Search ▶ click the desired General link under the <i>Action</i> column, OR • Select one of last 5 employers you assisted ▶ Corporate Profile option. • Click Reset Employer Account link. • Select desired reset option(s) and confirm email address. • Click Send.
<p>View Job Applicants for a Specific Employer</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 employers you assisted. • Click Recruitment Plan Profile ▶ Job Applicants tab ▶ Details links.
<p>Provide Resume Search Assistance for Any Employer</p>	<ul style="list-style-type: none"> • Click Manage Resumes ▶ Search for Resumes. • Select search area. • Enter search criteria. To review ranked results, determine whether criteria are <i>required</i> or <i>desired</i>. • Click Search; review results.
<p>Create Job Referral (from Resume Search Results)</p>	<p>To create job referral(s) from resume search results:</p> <ul style="list-style-type: none"> • Click Refer checkbox (es) for desired candidate(s). • Click Refer Selected Resumes. • Conduct job search to identify related employer(s)/job(s). • Click desired Refer link or Refer checkboxes. • Click Refer Selected Jobs. • Complete <i>Staff Information</i> section, <i>Referral Type</i> section, and <i>Employer/Job Seeker Notification</i> section, if applicable. • Click Save.
<p>Record Placements/Job Order Referral Results for Any Employer</p>	<ul style="list-style-type: none"> • Click Manage Labor Exchange ▶ Enter Referral Results. • Select search criteria and click Search. • Click the numeric link under the <i>Referrals</i> column. • Review/modify job order statistics or applicant information, if desired. • Select desired Applicant Status (for <i>Hired</i>, include hire date and hourly rate) for each applicant displayed. • Click Save to record results.
<p>Create Resume Alert for Specific Employer (Virtual Recruiter)</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 employers you assisted. • Click Recruitment Plan Profile ▶ Virtual Recruiter tab ▶ Create new Resume Alert. • Select search area. • Select desired search option, enters search criteria, and click Search. • Click Save this resume search on search results screen. • Complete Virtual Recruiter Information section and click Save.

Important Things You Can Do for Employers in VOS

<p>Create Candidate Referral for Any Employer</p>	<ul style="list-style-type: none"> • Click Manage Labor Exchange ▶ Mass Candidate Referrals. • Click Search Resumes to locate individuals with active resumes only, or Search Candidates for any individual. • Provide search criteria and click Search. • Click Refer checkbox (es) for desired individual(s) and click Refer Selected Individuals (or Refer Selected Resumes, depending on your selected search option). • Click Choose job(s) to refer. If you are currently assisting an employer, you may click Select Job(s) by “Employer name” and skip the next 2 steps. • Click job search location. • Select job search criteria and click Search. • Click desired Refer checkbox (es) and click Refer Selected Jobs. • Complete <i>Staff Information</i> section, <i>Referral Type</i> section, and <i>Employer/Job Seeker Notification</i> section, if applicable. • Click Save.
<p>Record Additional Worksite Locations</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 employers you assisted. • Click Corporate Profile ▶ Work Sites tab ▶ Add Work Site. • Record work site information. • Click Save.
<p>Record Additional Employer Contacts</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 employers you assisted. • Click Corporate Profile ▶ Contacts tab ▶ Add Contact. • Select desired work site from list box. • Record contact information. • Click Save.
<p>Create Interview Question Sets</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 employers you assisted. • Select Recruitment Plan Profile ▶ Interview Question Sets tab. • Click Create Interview Questions. • Record question set details. • Click Save.
<p>Add Interview Question Set to Existing Job Order</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 employers you assisted. • Select Recruitment Plan Profile. • From default Job Orders tab, click <i>Job Order Title</i> link for desired job. • Within <i>Job Applicant Questions</i> section, select desired Interview Question Set. • Click Save.

Important Things You Can Do *for Employers* in VOS

<p>Add Resume to Employer's 'Favorites' Folder</p>	<ul style="list-style-type: none"> • Follow steps from former <i>Provide Resume Search Assistance for Any Employer</i> topic to display resume search results. • Click desired Resume link. • Click Save to Favorites link at page bottom. • Select appropriate category. • Rate the applicant and record notes, if desired. • Click Save.
<p>Record/Preview Services Provided to Employer</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer ▶ select search criteria, click Search, click desired <i>Username</i> link; OR • Select Manage Activities ▶ Employer Services ▶ select search criteria, click Search, click desired <i>Username</i> link. • View existing services, OR • Click desired link to add single or multiple services. • Record service details. • Click Save.
<p>Manage Employer Case Notes</p>	<ul style="list-style-type: none"> • Click Manage Employers ▶ Assist an Employer. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 employers you assisted. • Click Case Management Profile. • Click Templates link to create a model for generic case notes. • Click Add Case Note link to create actual case note.

Important Things You Can Do for Individuals in VOS

<p>Reset an Individual's Login Data via Email</p>	<ul style="list-style-type: none"> • Click Manage Individuals ▶ Assist an Individual. • Select search criteria ▶ click Search ▶ click the desired General link under the <i>Action</i> column, OR • Select one of last 5 individuals you assisted ▶ Personal Profile option. • Click the Click Here to Reset Account link. • Select desired reset option(s) and confirm email address. • Click Send.
<p>View/Edit Social Security Number (SSN)</p>	<ul style="list-style-type: none"> • Click Manage Individuals ▶ Assist an Individual. • Select search criteria ▶ click Search ▶ click the desired General link under the <i>Action</i> column, OR • Select one of last 5 individuals you assisted ▶ Personal Profile option. • Click the View/Edit SSN link. • Record the appropriate SSN. • Click Save.
<p>Provide Resume Assistance to Any Individual</p>	<ul style="list-style-type: none"> • Click Manage Resumes ▶ Create a Resume. • Select search criteria and click Search; review search results. • Click desired link under <i>Username</i> column. • To view or modify a resume, click its title link. • To delete a resume, click the desired checkbox and click Delete. • To create a new resume, click Create New Resume. • To reactivate an old resume, click Activate All Resumes.
<p>Verify or Review Individual's Background Information</p>	<ul style="list-style-type: none"> • Click Manage Individuals ▶ Assist an Individual. • Select search criteria and click Search; review search results ▶ click desired link under <i>Username</i> column; OR • Select one of last 5 individuals you assisted • Click Personal Profile ▶ Background tab. • Select desired status (<i>verified</i> or <i>reviewed</i>) ▶ click Update Status. • Click OK.
<p>Provide Job Search Assistance for Any Individual</p>	<ul style="list-style-type: none"> • Click Manage Job Orders ▶ Search for Jobs. • Select geographic area. • Select job search criteria and click Search.
<p>Create Job Seeker Referral from Job Search Results</p>	<p>To create job seeker referral(s) from job search results:</p> <ul style="list-style-type: none"> • Click Refer checkbox for desired job(s). • Click Refer Selected Jobs. • Click Select Name (if currently assisting individual), Search Resumes, or Search Candidates. • Conduct resume/candidate search, if applicable, based on former step. • Select desired applicant link or checkbox (es). • Click Refer Selected Resumes or Refer Selected Individuals based on your search option. • Complete <i>Staff Information</i> section, <i>Referral Type</i> section, and <i>Employer/Job Seeker Notification</i> section, if applicable. • Click Save.

Important Things You Can Do for Individuals in VOS

<p>Confirm Services Provided to Individual</p>	<ul style="list-style-type: none"> • Select Manage Activities ▶ Individual Services ▶ select search criteria, click Search, click desired <i>Username</i> link, OR • Click Manage Individuals ▶ Assist an Individual ▶ select search criteria ▶ click Search ▶ click desired Activities link ▶ click Activity History / Service Plan link. • View existing services.
<p>Create New Job Alert for Specific Individual (Virtual Recruiter)</p>	<ul style="list-style-type: none"> • Click Manage Individuals ▶ Assist an Individual. • Select search criteria ▶ click Search ▶ click the desired <i>Username</i> link, OR • Select one of last 5 individuals you assisted. • Select the Employment Plan Profile ▶ Virtual Recruiter Tab. • Click Create new Job Alert. • Select search area. • Select desired search option, enters search criteria, and click Search. • Click Save this job search on search results screen. • Complete Virtual Recruiter Information section and click Save.
<p>Perform WorkKeys Assessment</p>	<ul style="list-style-type: none"> • Click Manage Individuals ▶ Assist an Individual. • Select search criteria ▶ click Search ▶ click the desired <i>Username</i> link, OR • Select one of last 5 individuals you assisted. • Select the Case Management Profile ▶ Assessments Tab. • Click the WorkKeys link. • Enter skill level data for each assessment and click Save.
<p>Create Job Referral for Any Individual(s)</p>	<ul style="list-style-type: none"> • Click Manage Labor Exchange ▶ Mass Job Referrals. • Select job search area. • Select job search criteria and click Search. • Click Refer checkbox for desired job(s) and click Refer Selected Jobs. • Click Search Resumes to refer individuals with active resumes only, Search Candidates for any individual. If you are currently assisting an individual, you may select them and skip the next 2 steps. • Provide search criteria and click Search. • Click Refer checkbox for desired individual(s) and click Refer Selected Individuals (or Refer Selected Resumes, depending on your selected search option). • Complete <i>Staff Information</i> section, <i>Referral Type</i> section, and <i>Employer/Job Seeker Notification</i> section, if applicable. • Click Save.
<p>Manage Individual Case Notes</p>	<ul style="list-style-type: none"> • Click Manage Individuals ▶ Assist an Individual. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 individuals you assisted. • Click Case Management Profile. • Click Templates link to create a model for generic case notes. • Click Add Case Note link to create actual case note.
<p>Manage Objective Assessment Summary</p>	<ul style="list-style-type: none"> • Click Manage Individuals ▶ Assist an Individual. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 individuals you assisted. • Click Case Management Profile ▶ Plan Tab.

Important Things You Can Do <i>for Individuals in VOS</i>	
Manage an Individual's Case Summary, Chronological Case History, or Individual (account) information	<ul style="list-style-type: none"> • Click Manage Individuals ▶ Assist an Individual. • Select search criteria, click Search, click desired <i>Username</i> link, OR • Select one of last 5 individuals you assisted. • Click Case Management Profile ▶ Summary Tab.
View Your Caseload	<ul style="list-style-type: none"> • Click My Staff Resources ▶ My Cases OR • Click Manage Case Assignment ▶ View Case Load.

Important Things You Can Do <i>for Anyone in VOS</i>	
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Send a Message	<ul style="list-style-type: none"> • Click Manage Communications ▶ Manage Messages. • Click Create New Message. • Complete <i>Recipient Information</i> and <i>Message Information</i> sections. • Choose whether to send message via email. • Click Send Message.
Schedule an Appointment	<ul style="list-style-type: none"> • Click Manage Communications ▶ Manage Appointments. • Click Add Appointment. • Complete appointment details, including date and time, attendees, and courtesy notifications, if desired. • Click Save.
Update Event Calendar	<ul style="list-style-type: none"> • Click Manage Activities ▶ Events. • Click Add Event. • Enter event details. • Click Save.
Create/Manage System Alerts	<ul style="list-style-type: none"> • Click Edit link for desired system alert. • Record the necessary information. • Click Save.
Save Report Parameters (<i>My Reports</i>)	<ul style="list-style-type: none"> • Click View Reports. • Click a desired report option/sub-option. • Select desired report filters. • Click Save to My Reports link. • Enter a report description and share command. • Click Save.
My (Saved) Search Lists	<ul style="list-style-type: none"> • Select Manage Individuals ▶ Assist an Individual, OR • Select Manage Employers ▶ Assist an Employer. • Select search criteria and click Search. • From search results displayed, select desired checkboxes. • Click Save List link. • Record a list title and click Save.

Attachment 4: NMVOSS Register Self-directed/Re-enrollment Instructions:

Logging In

If you don't have an account:

- Click the Home page graphic, the [Start here](#) or [Click here](#) links, or the [Not Registered?](#) link.
- Click [Register](#) > [Individual](#).
- Create a unique user ID and password.
- Fill in required (*) fields.



Figure 4.1 Home Page Snap Shot

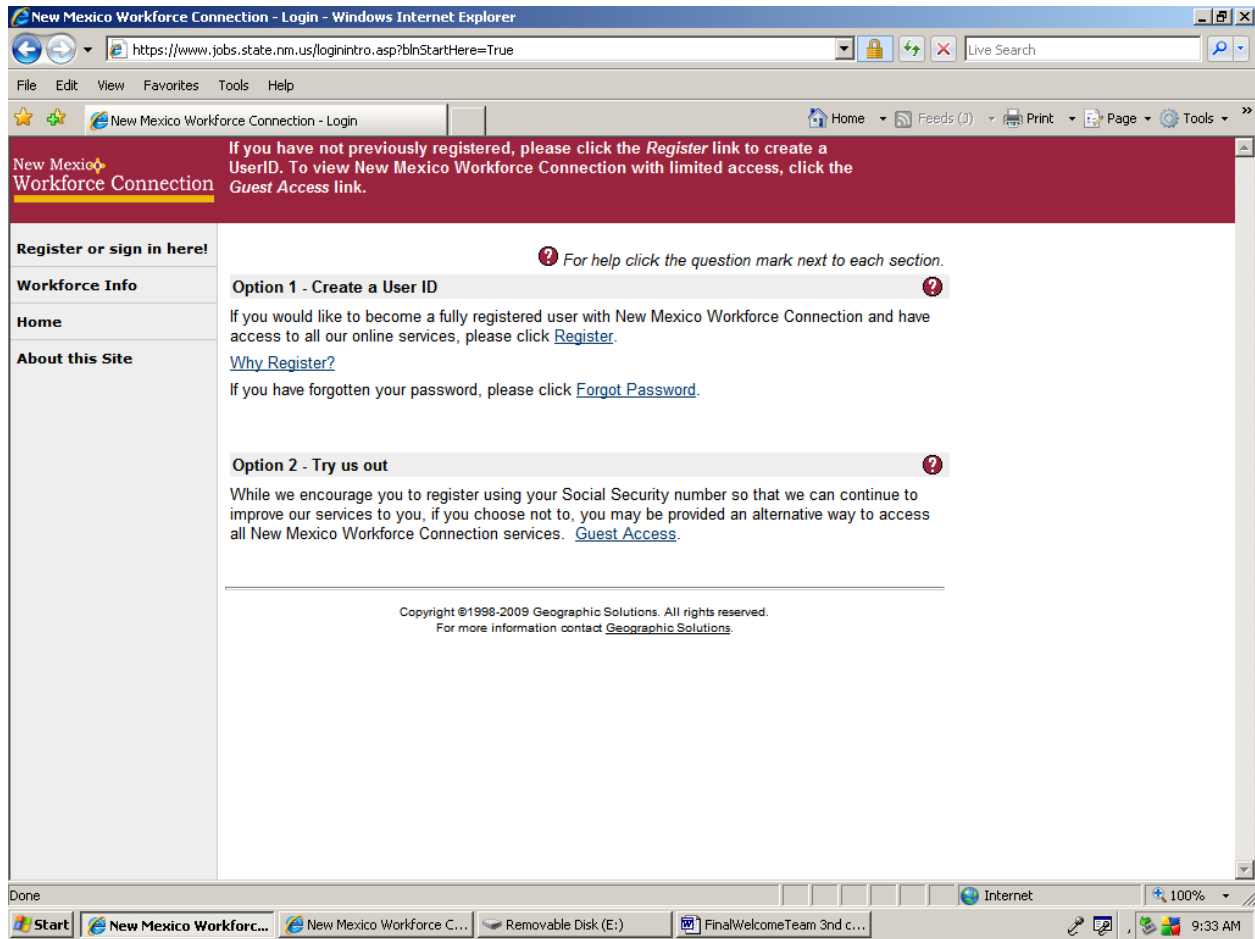


Figure 4.2 Self-register Snap Shop, click on register.

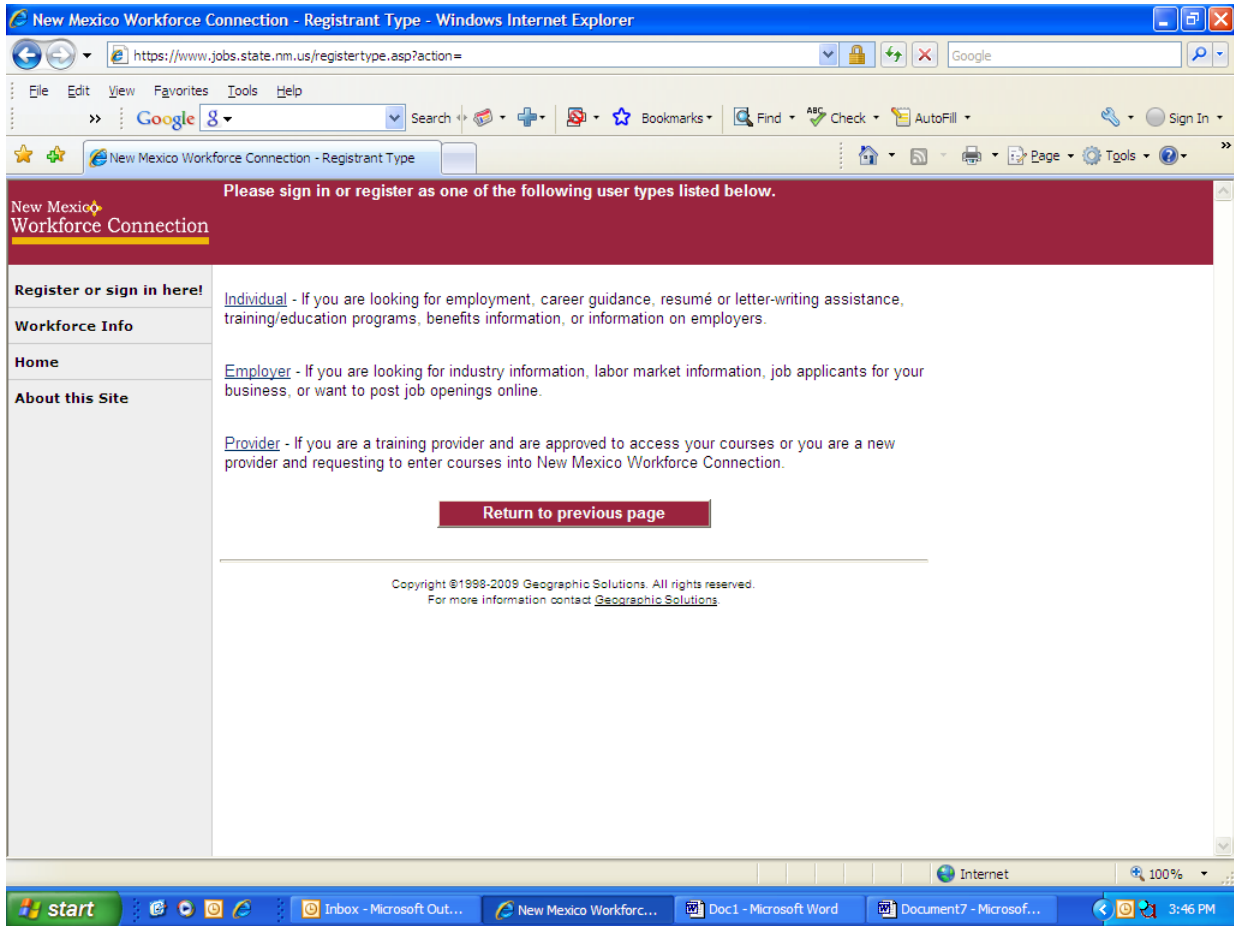


Fig 4.3 Self-register Snap Shop, click on individual

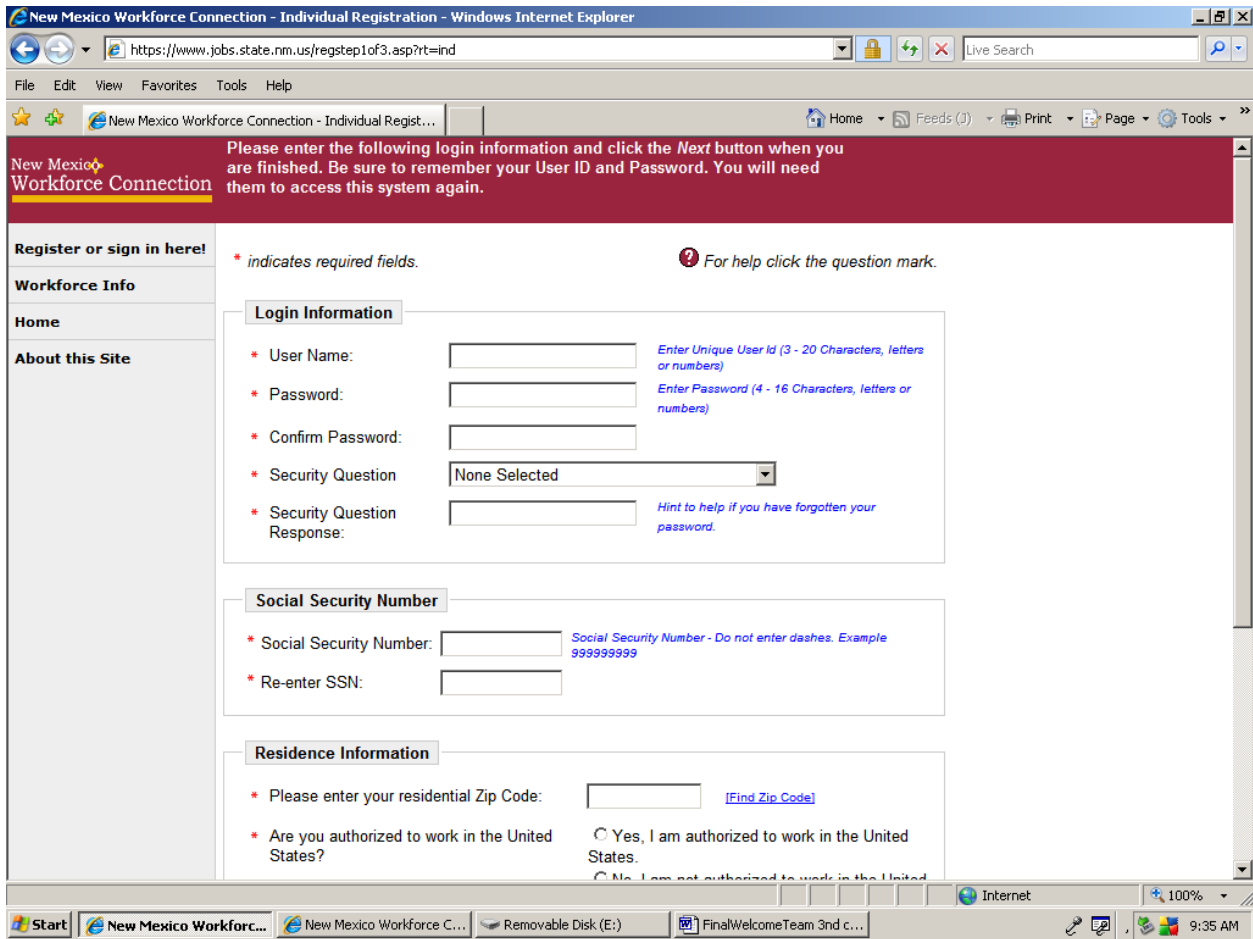


Figure 4.4 Individual Self-register information.

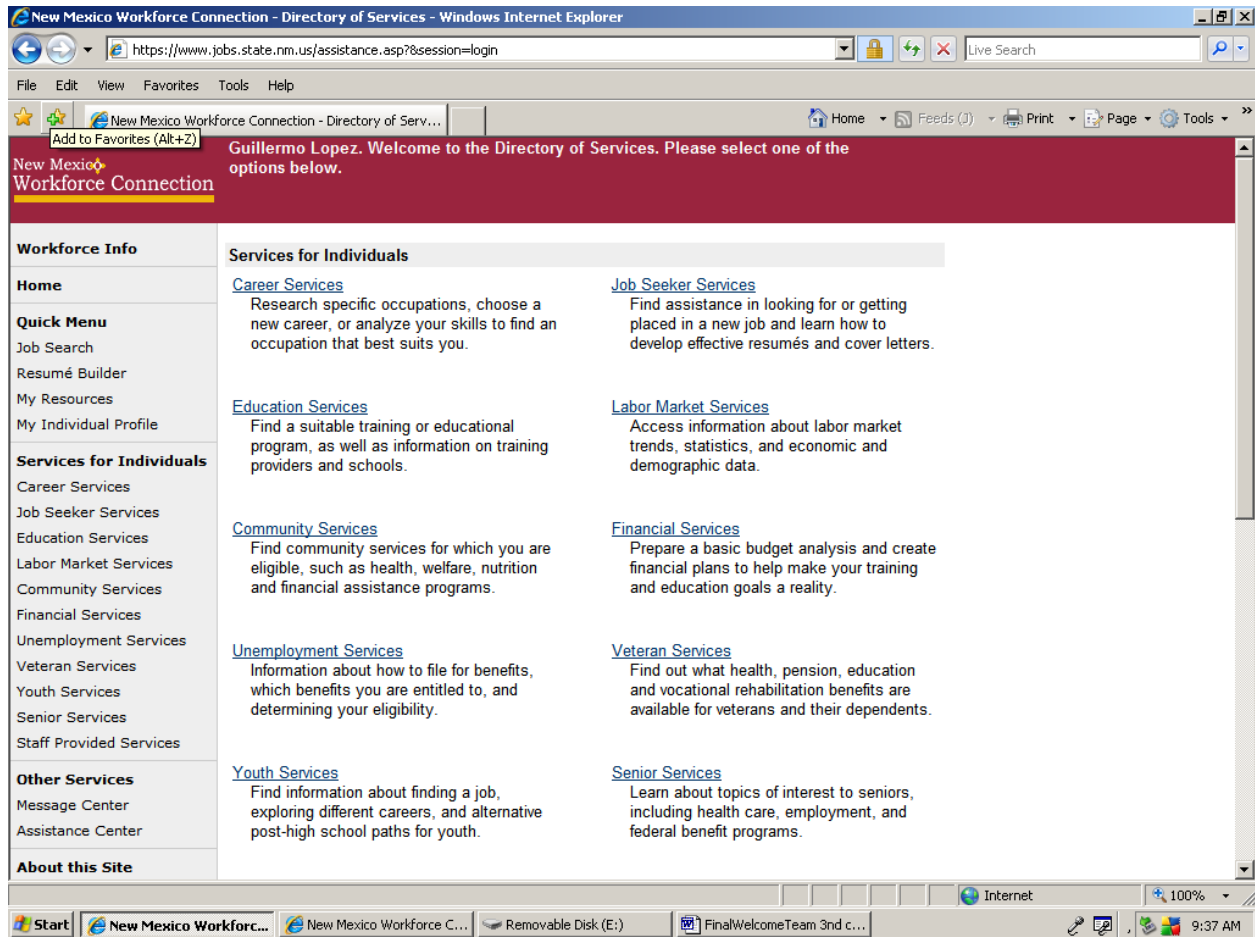


Figure 4.5 Snap shot after individual has register and ready for NMVOSS employment activities.

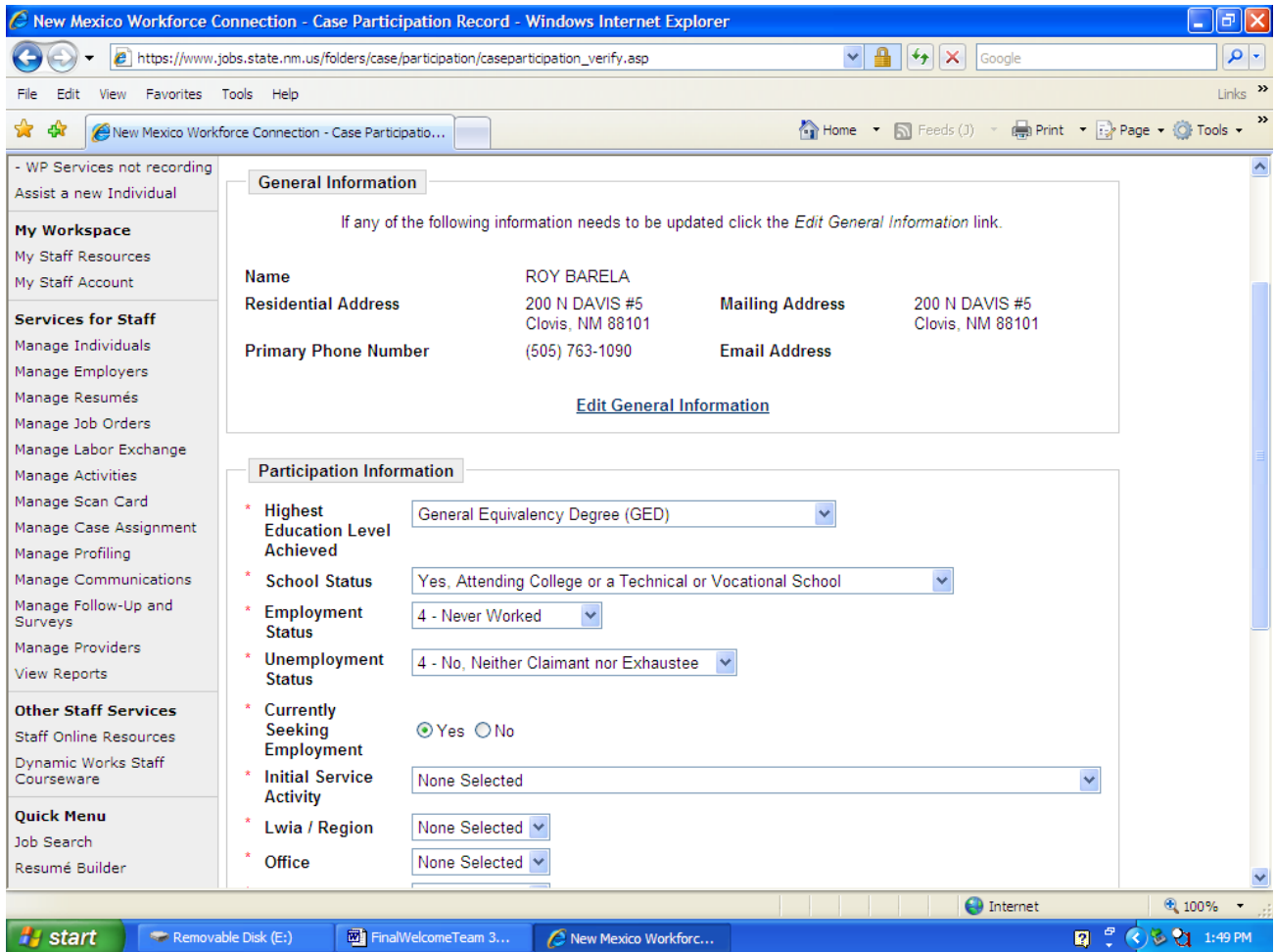


Figure 4.6 Snap Shot of a register individual who is not active. Staff members will need to verify the Highest Education Level achieved, School Status, Employment Status and unemployment status blocks.

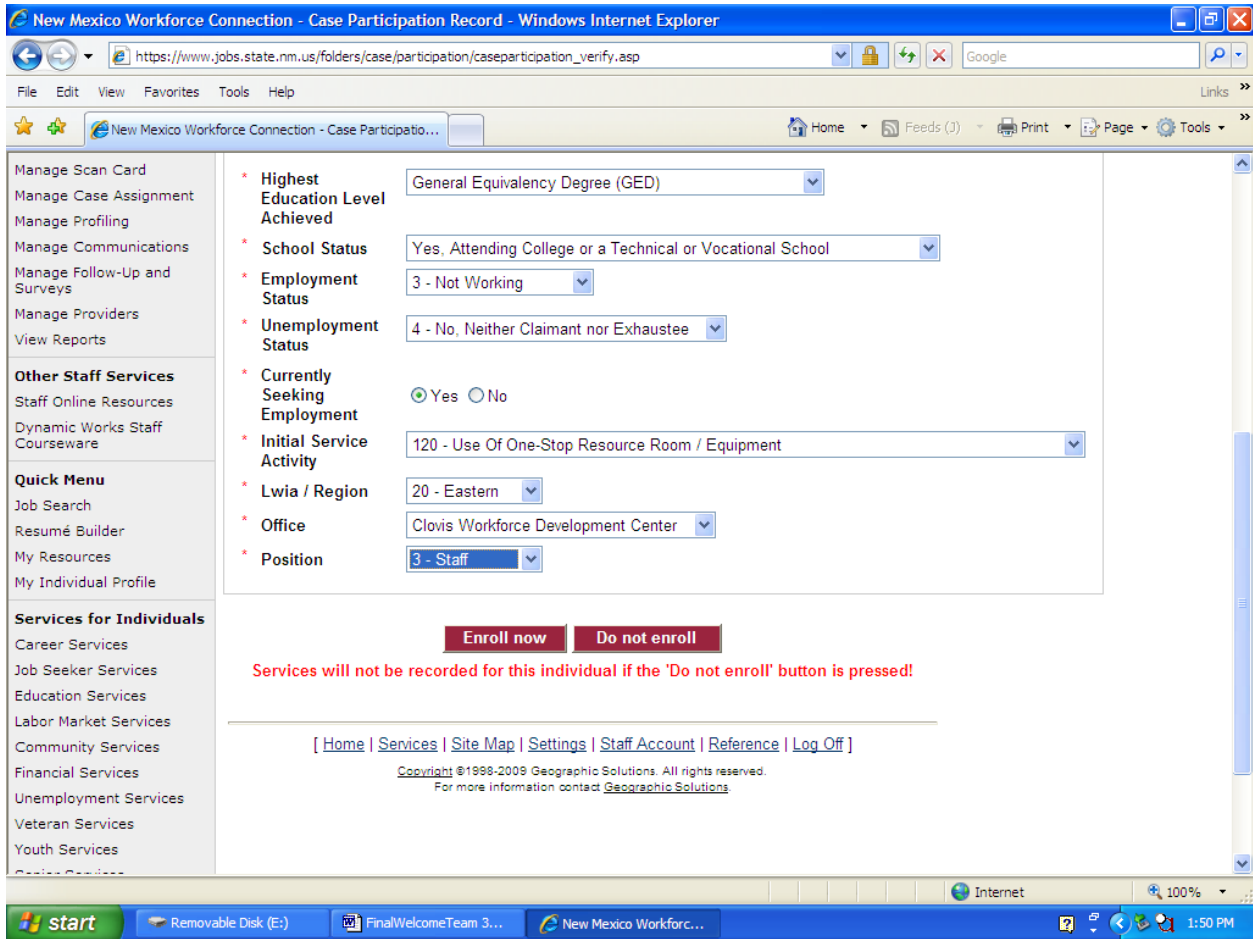


Figure 4.7 Snap shot after verifying individual's status block, once filled click on "Enroll now" tab.

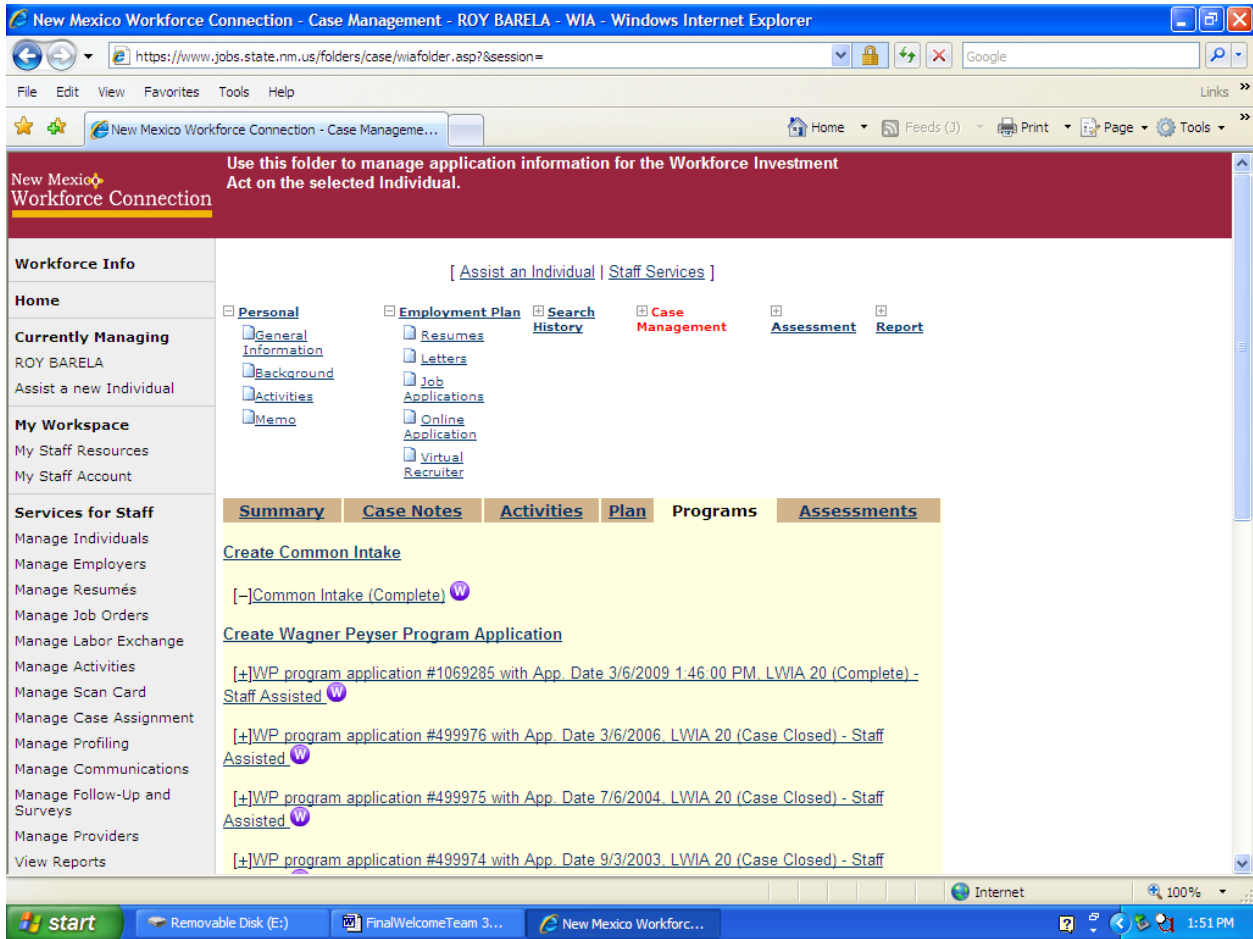


Figure 4.8 Snap shot after re-enrolling individual.

Attachment 5

Attachment 6 Welcome Team Forms:

PLEASE PRINT THE INFORMATION LISTED BELOW:			
FULL NAME		SOCIAL SECURITY NO.	
ADDRESS		TELEPHONE	
CITY	STATE	ZIP	
MALE OR FEMALE	DATE OF BIRTH		
ARE YOU A MILITARY VETERAN _____ YES _____ NO			

<p>New Mexico Workforce Connection Registration Card</p> <p>USER NAME: _____</p> <p>PASSWORD: _____</p> <p>Website: https://www.jobs.state.nm.us/</p>

<p>New Mexico Workforce Connection Appointment Card</p> <p>Case Manager:</p> <p>Date:</p> <p>Time:</p> <p>Call 575-XXX-XXXX to reschedule</p>
