



A Guide to GK Employment

The Employment module allows you to track information regarding existing employment as well as job searches for consumers. The information that is tracked for each job or job search includes the DODD required information that is entered through the OTS portal.

Links: There are two links to outside resources, Ohio Means Jobs and Ohio Means Accessibility. Users can click on either one and be taken to the appropriate website. Security must be given to both outside website before the user will see these options.

List of Topics

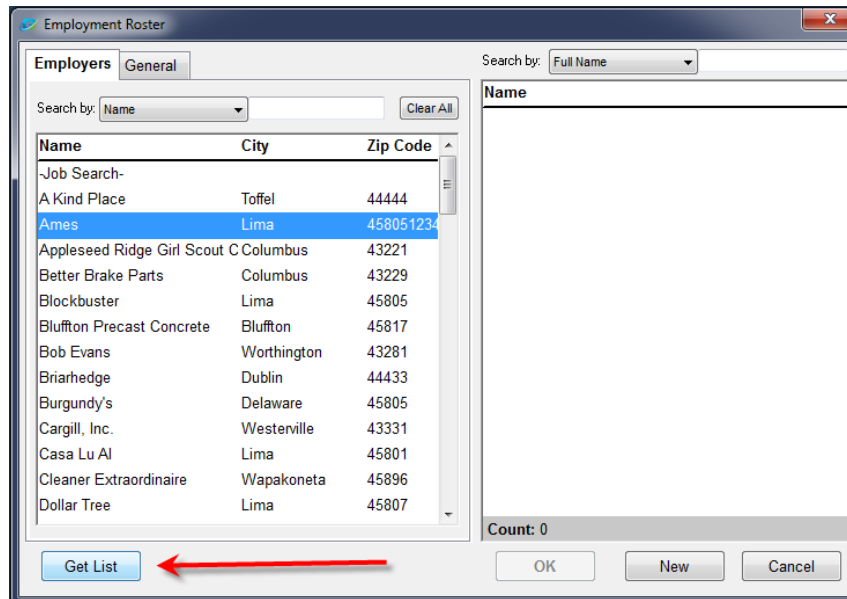
- Employment Roster
- Employment Insert Wizard
- General Information Window
- Position Information Window
- Job Matching

Employment Roster

- From the Dashboard, select the Employment module/ Employment window.
 - The roster will appear.
 - Using the filters available, the user will choose from a list of names in order to view the information of a consumer with employment data already entered or enter new employment data.
 - **To view all consumers in the Employment Module:** Open the Employee Roster and click 'Get List.'
 - **To view all consumers with a specific employer(s):** Highlight the employer or employers that are part of the search, then click 'Get List.'
 - A listing of the current employers is pulled from the Employer window. This list is sortable by Name, City, or Zip Code for ease of pulling specific geographic areas or employers. Pulling from a specific employer or group of employers is **NOT** required for this filter.



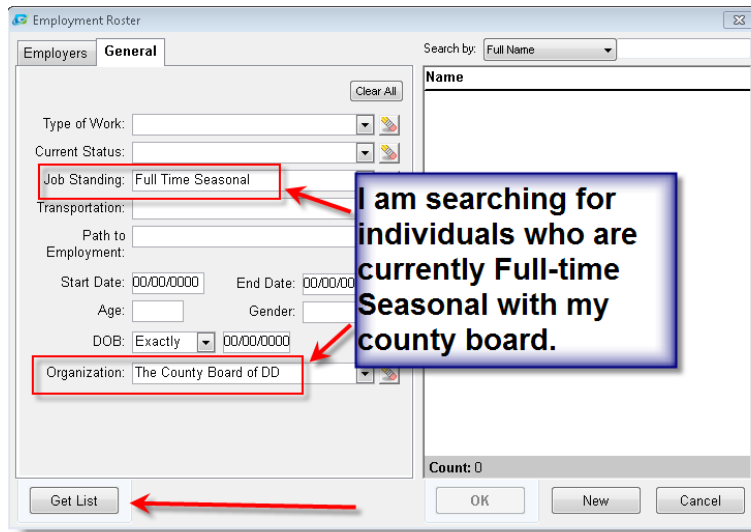
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- **General tab:** The General tab gives the user additional filters to drill down in order to locate a specific group of consumers.
 - **Type of Work:** This is an OTS required listing of generalized areas of employment.
 - **Current Status:** Filters on Full-time, Part-time or Seeking Employment individuals
 - **Job Standing:** A county defined listing of job status. These may include Full-time Seasonal, Full-time, or Volunteer.
 - **Transportation:** Defines the transportation type for a consumer transported to work, i.e. bike, bus, etc.
 - **Path to Employment:** A listing of DODD-required employment statements.
 - **Start Date/End Date:** This filter will pull all individuals that have start or end dates within the specified dates.
 - **Age:** Filter will pull all those individuals currently at the age specified.
 - **Gender**
 - **DOB:** User can pull an exact date of birth or a range.
 - **Organization:** Pulls individuals based on the Organization listed in the People window. Leaving this blank will default to your county board.
 - **Clear All:** On both tabs, users can remove the information on that tab by clicking on Clear All. To clear a specific line item, click on the “eraser” button at the end of the line.
 - Users may choose advanced criteria from this window. If employers are chosen, the system will base the selection on both tabs. Pulling from these fields is **NOT** required for this filter.



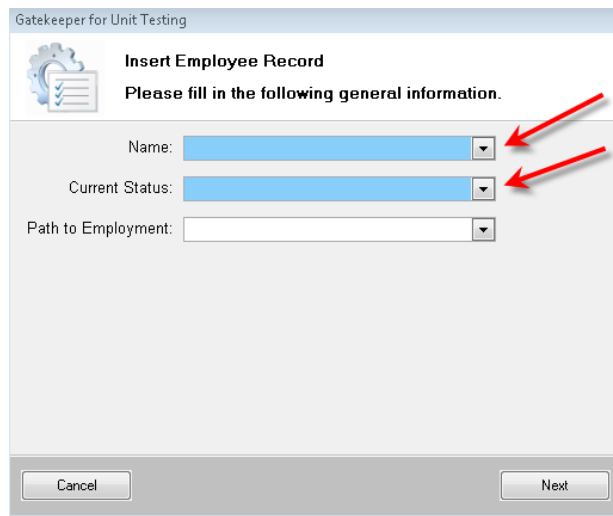
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Employment Insert Wizard

Adding a New Consumer to Employment Module

- If the user wants to add an individual that has not been added to the Employment Module, choose “NEW” from the filter.
- The Insert Wizard will appear.
 - Required information is highlighted in blue.



- If Employment information has already been entered for a consumer, then his/her name will not appear in the Insert Wizard.
- If you would like to insert a new Job Search or Employment Position for that consumer, you will have to view an existing Job Search or position and select insert. Note: There is an entry in the Employer category that reads “Job Search.”



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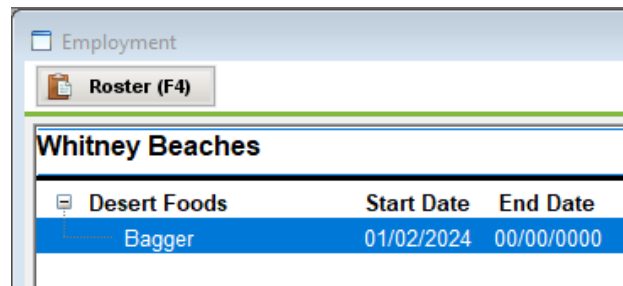
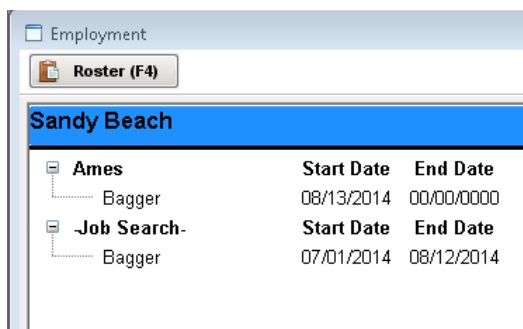
Using this option for individuals who are seeking employment will allow you to enter more than one Job Search for different positions.

General Employment Window

- Once a Search or Insert has been completed, the system will display one consumer at a time.
- The employment history will be listed on the left in Tree view format, with a group of tabs on the right.
- This first group of tabs is an overview of the Employee.

Tree view:

- The tree view is designed to display the employment history at a glance.
 - The tree view shows the consumer name at the top and Employers or Job Searches underneath.
 - Each Employer or Job Search will also display the position held at the company or the desired position as well.
 - The information displays in date order, with the latest history at the top. Depending on the cursor, the user will see 2 sets of tabs to the right: the first set displays the overall general information regarding the employee, the second set displays specific information based on the position.



- When the consumer's name is highlighted on the tree view, the tabs on the right of the screen will display general information about the individual. Those tabs include: General Information, Funding, Job Skills, Job Training & Certification, Preferences, Contacts and Review.
- When the position is highlighted, the tabs on the right of the screen will display specific position information about the individual. The tabs include Employment Information, Wages & Benefits, Job Skills, Job Training & Certification, Attachments, Position Tasks.



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General Information Tab: This tab displays general information about the individual.

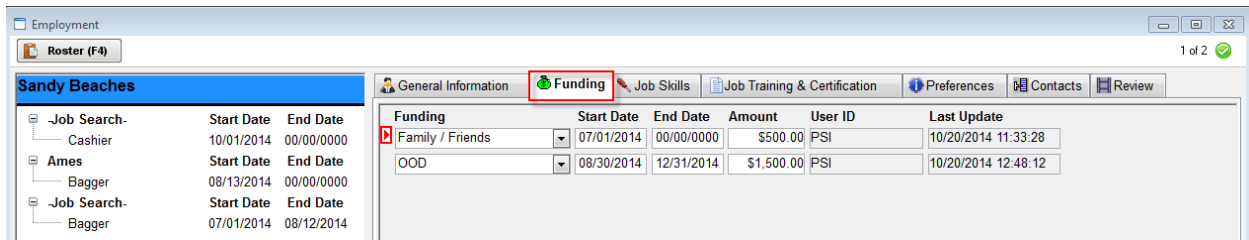
- Current Status is required to be entered via the Insert Wizard and will populate automatically when a new consumer is entered.
- The Education Level is pulled from the Demographics – People (School/Transition tab) screen.
- The Path to Employment displayed on this window is not required, but the options are the same as those defined in the OTS initiative. There are also start/end dates so that a county can track movement within the Path to Employment.
 - Utilizing this information will give the user another option when filtering.
- There is a field for any notes relevant to the individual. All fields on this tab are editable with the exception of Education Level.

Employment Path	Start Date	End Date	User Id	Last Update
1 - I have a job but would like a better one or to move up.	12/15/2014	00/00/0000	PSI	03/31/2015 13:35
2 - I want a job! I need help to find one.	07/01/2014	12/13/2014	PSI	03/31/2015 13:35

Funding Tab: This tab will track funding supports that are available to the individual. You can add or delete supports by going to the **Employment Codes window**. Add a new funding stream by clicking in the funding window and clicking on insert.

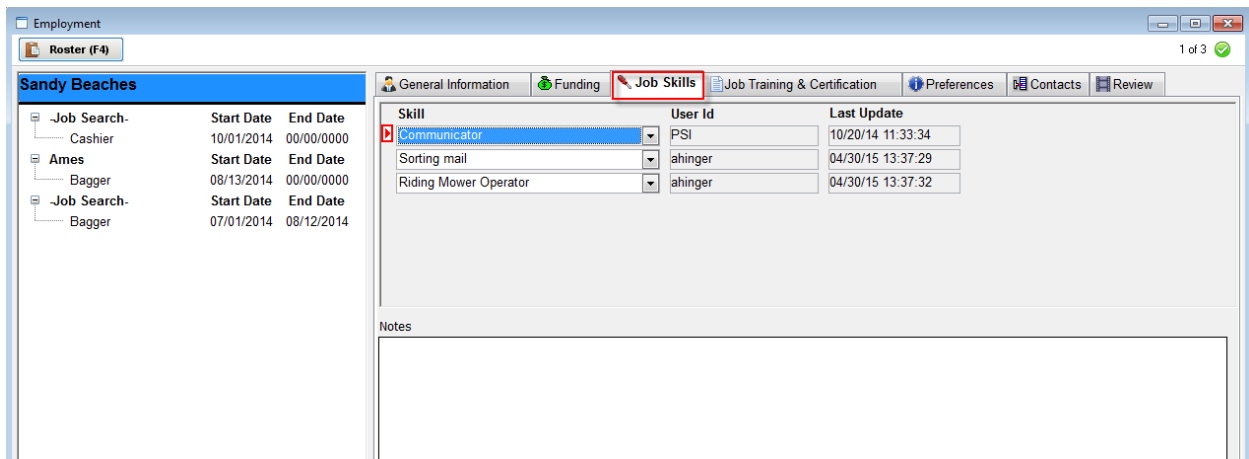


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Job Skills Tab: This is used to track the Job Skills of the individual. Skills not available in the dropdown can be added in the **Employment Codes window**.

- This list is to be used as a master list of all Job Skills that the individual possesses. Skills from this list can also be attached to individual positions or desired positions.
- Entries on this window can be added by selecting insert from the tool bar.

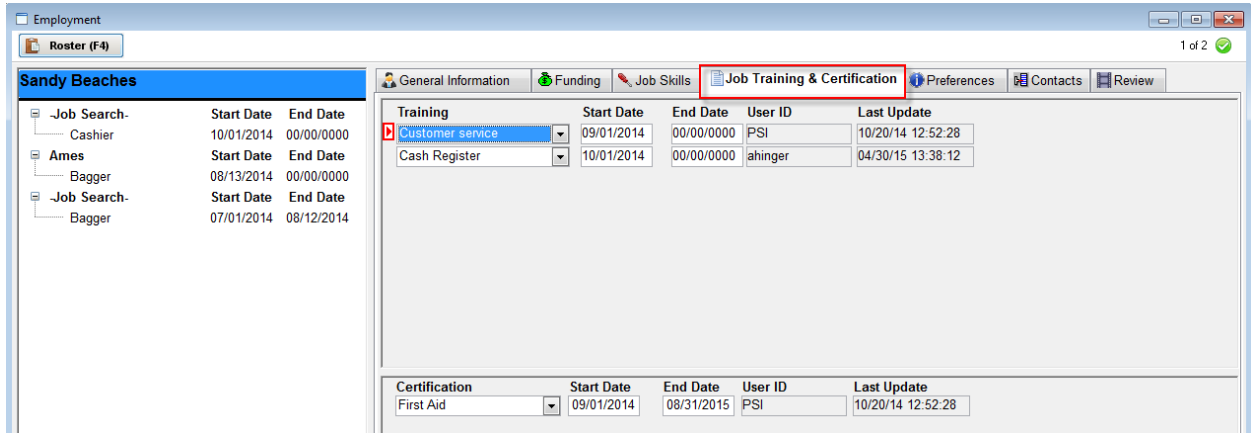


Job Training & Certification Tab: This tab is to track Job Trainings & Certifications that the individual possesses.

- You can add or delete Job Trainings & Certifications in the **Employment Codes window**. This list is to be used as a master list of all Job Trainings & Certifications that the individual possesses.
- Trainings are tracked on the top half of the window and Certifications on the bottom half of the window. Items from these lists can also be attached to each position or desired position.
- Additional entries can be made by clicking on the specific part of the screen where you would like to insert an entry, and selecting insert from the tool bar.

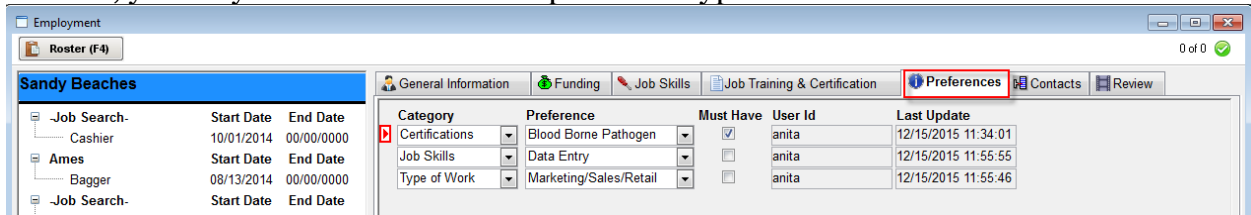


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Preference Tab: This tab is designed to facilitate our Job Matching wizard.

Entries on this tab would show specific information related to categories defined in our of Employment Codes window. For example, if Sandy is only interested in certain types of work, you may make entries for her preferred types of work:



Note that each entry has a column for **Must Have**. Assigning a category as a Must Have is then used in our job matching tool as very specific criteria to use in looking for available jobs. You may have an unlimited number of entries on this tab and can delete them as they become obsolete.

- Please see **Job Matching section** for more information.



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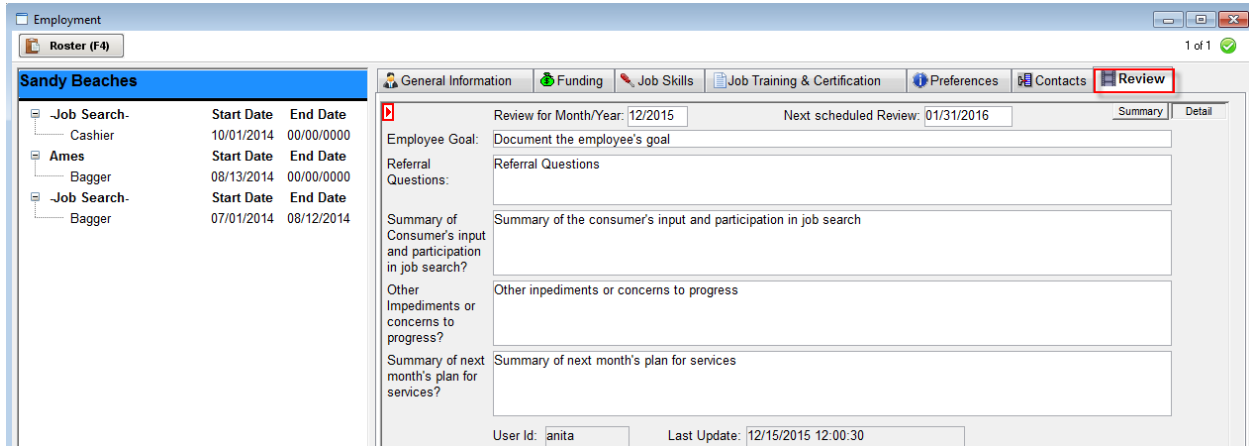
Contact Tab: This tab is used to record contacts made with either a prospective employer or with an employer who currently employs consumers you are serving. Features on this tab are as follows:

- **Employer:** Contacts related to a specific employer will also be visible on the employer's record.
- **Follow-Up Required?** If this box is checked, a date field is enabled to enter the follow-up date. There is an alert available for the date field on the Dashboard.
- **From Case Notes?:** If the contact was entered from Gatekeeper's Enter/Review Case Notes window, this box will be checked. For billable case notes, the contact can only be edited if the case note has not been batched for billing.
- **Days Back:** This field will filter the contacts based on today and the date of the contact.
- **Summary/Detail:** A detailed note will be available if the Detail button is selected from the top. If you select Summary, it will show a list view of the contacts. From this view, simply click the contact you want to view in detail.
- To insert a new Contact
 - Click the insert button on the toolbar.
 - Fill in the required information, which includes Contact Type and a Note.
- To delete a Contact
 - Click the delete button on the toolbar. NOTE: Contacts associated with a billable case note that have been batched for billing cannot be deleted.
- Existing contacts can be edited as long as they were not created from a billable case note that has been batched for billing.



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Review Tab: This tab is used to record pertinent review information. While this tab can be used for any service as a general employment progress tracking tool, it is specifically used with Opportunities for Ohioans with Disabilities services:



To insert a new Review

- Click the insert button on the toolbar.
- All fields on the Review tab are required
- To delete a review, click on the delete button on the toolbar.

Position Information Window

Position or Desired Position Information

- To view information about a specific position or desired position, select that position/desired position from the tree view on the left and the tabs on the right will display the information corresponding to that position.

Employment Information: This tab displays information about a current position held by the individual or displays information about a position that the individual desires to hold. Some of the fields on this window contain information that is collected through the OTS portal.

- In order to track OTS information in Gatekeeper, these fields should have entries. The dropdown options available in the fields match those that are required by the portal. To meet the OTS information collection requirements, the following fields (highlighted below) should be completed:
 - Employer
 - Start Date
 - End Date (if applicable)
 - Employment Type
 - Transportation



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- Type of Work
- Obtained Job
- Ending Reason (if applicable)

- Employer Demographic information is also available by clicking on the ellipsis beside the Employer dropdown.
 - This will display basic information, such as address, phone, email, as well as a link to a web map and printing an envelope. In order to update this information, users will need to do so in the Employer window.

Wages & Benefits Tab: This tab displays Wages & Benefits information about a position held by the individual or displays information about a position that the individual desires to hold.

- It is possible to track historical data as wages or hours change.
- To insert new information, use the insert button from the toolbar to insert a new line.



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Some of the fields on this window contain information that is collected through the OTS portal. In order to track this information in Gatekeeper, the fields should have entries. To meet the OTS information collection requirements, the following fields (highlighted below) should be completed:

- Hours/Week
- Hourly Wages
- Start Date
- End Date (if applicable)
- Any Benefits provided by the employer (by using the check boxes)

Hours/Week	Hourly Wages	Start Date	End Date	User Id	Last Update
15	9.50	09/13/2014	00/00/0000	PSI	10/20/14 13:58:32
10	9.50	08/13/2014	09/12/2014	PSI	10/20/14 13:58:10

Vacation/Sick:	<input checked="" type="checkbox"/>
Medical/Dental/Vision:	<input checked="" type="checkbox"/>
Retirement:	<input type="checkbox"/>
Employee Discount:	<input checked="" type="checkbox"/>
Other Benefits:	<input type="checkbox"/>



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Job Training & Certification Tab – position specific: This tab displays Job Training & Certification that the individual possesses **that are pertinent** to the selected position. To insert a Job Training or Certification from the individual's master list, select insert from the tool bar. The options available on insert will be pulled from the master list of the individual. To add to the Job Training & Certification master list, go to the general information Job Training & Certification tab by selecting the name of the individual from the tree view and the Job Training & Certification tab that appears there.

Training	Start Date	End Date	User ID	Last Update
Customer service	09/01/2014		PSI	10/20/14 14:01:55

Information for dropdown pulled from the overall list for the individual.

Certification	Start Date	End Date	User Id	Last Update
First Aid	09/01/2014	08/31/2015	PSI	10/20/2014 14:01



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Attachments Tab – The Attachments tab allows users to save specific documentation and/or forms that are related to the position. Items, such as resume, assessments, etc.

To insert, click inside of the Attachments tab and then click insert. A line will appear, as well as the browser for the user to choose where the PDF is located. Choose the path and click open. The Description will be named according to the saved document, however the name can be changed in this window.

Description	User Id	Last Update
Resume	PSI	2/17/2015 08:57:39
Discovery Assessment	PSI	3/31/2015 14:03:38

Job Matching

Our Job Matching window adds intelligence to assist with job searches, whether by employer or by employee. This tool will compare the specific position requirements – or specific individual preferences to locate the best available matches in the system.

When you open the Job Matching window, you will see two different tabs, one that typically searches for positions, and one that typically searches for employees.

Search for Positions: This tab is used to search for positions from the Job Seeker’s perspective. There are two (2) ways this tab can be used:

- **Specific Employee:** If you specify a particular employee, it will list his/her preferences, and this list can be edited for the purpose of the job search. It does not edit the actual defined preferences for the individual.
- Using this method, the search will return a list of positions that ‘match’ the employee’s preferences, based on whether the preferences are ‘Must Have?’ and also based on the Minimum Match % specified.
 - Any position or employee who does not have a criteria type specified as a ‘Must Have?’ in the search will be excluded.
 - If geo code information is available for the employee, the Maximum Distance field will also be available to aid in your search.



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- Position Search Only: If no employee is specified, you will insert the specific preferences/criteria you need to identify acceptable positions.
 - In this search, employees are not included in the search; positions are searched for a listing of those that meet the specified data, again based on your Minimum Match % and whether the requirement is a 'Must Have?'
 - Any position that does not have a criteria type specified as a 'Must Have?' in the search will be excluded.



In both cases, use the **Active Only?** checkbox to specify if the search should include all positions or only active positions.

Position Search for Specific Employee: If one employee is selected, then a list of the employee's defined preferences will appear in the category search box. For the purpose of the search, this list can be edited.

- Editing this list does not update the individual's preferences as defined in the Employment Window.

Position Only Search: Choosing this search method will return a list of positions available based on the position requirements you will specify.

For either of the above options:

- Inserting Criteria: You may enter as many rows of search criteria as needed for the search by clicking the  button on the toolbar. Indicate for each row whether this item is 'Must Have', or required. A must have means that the criteria is required.
- Use the **Active Only?** checkbox to specify if the search should include all positions or only active positions.
- To remove a piece of criteria, simply click the  button to the right of the criteria you wish to remove.
- To clear your selections and start over, click the button.

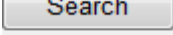
Below is an example of a typical search for positions where there is no employee involved:



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The screenshot shows the 'Job Matching' window with the 'Search for Employees' tab selected. The 'Employee' field is empty. 'Minimum Match %' is set to 10. 'Active Only?' is checked. The criteria table is as follows:

Criteria Type	Value	Must Have?
Certifications	Blood Borne Path	<input checked="" type="checkbox"/>
Type of Work	Education/ Child	<input type="checkbox"/>
Job Skills	Data Entry	<input type="checkbox"/>

Once selections have been made, click the  button to generate the search. The search results will be displayed on the right-hand side of this window, indicating employer positions that meet your search requirements:

The search results, a list of available positions, will appear on the right side of the screen:

The screenshot shows the 'Job Matching' window with search results. The search criteria are the same as in the previous screenshot. The results are as follows:

Position:	Employer:	Match %
Receptionist Type of Work: Computer/Technology Active: <input checked="" type="checkbox"/>	Primary Solutions 6665 Busch Blvd. Columbus, OH 43229 (614) 430-0355	33%
Receptionist Type of Work: Food Service Active: <input checked="" type="checkbox"/>	Raising Canes Chicken Gahanna, OH () -	33%

For QuickPrint reports from this tab, click the  button on your toolbar. These reports include the data retrieved from the search.

Search for Employees: This tab is typically used to search for employees from the employer perspective, in terms of employer position preferences. There are two (2) ways this tab can be used:

- **Specific Employer:** If you specify a particular employer and position, it will list that position's job requirements, and this list can be edited for the purpose of the job search.
 - It does not edit the actual defined requirements for the position.
- Using this method, the search will return a list of employees that 'match' the position's requirements, based on whether the requirement is a 'Must Have?' and also based on the Minimum Match % specified.



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- If geo code information is available for the employer/position, the Maximum Distance field will also be available to aid in your search.
- Employee Search Only: If no employer/position is specified, you will insert the specific employer preferences to be used in the search.
- In this search, positions are not included in the search; employees are searched for a listing of those that meet the specified data, again based on your Minimum Match % and whether the requirement is a 'Must Have?'

In both cases, use the **Active Only?** checkbox to specify if the search should include all positions or only active positions.



A list at the top of the window will allow you to select a search of all employees or to select one. It will default to a search for all employees.

Specific Employer Search: If one employer/position is selected, then a list of the employer's defined requirements will appear in the category search box.

- For the purpose of the search, this list can be edited.
- These edits do not update the employer's preferences as defined in the Employers Window.

Employee Only Search: Choosing this search method will return a list of employees who have the preferences you have defined in your search request. Only active employees are included in this search.

For either of the above options:

- Inserting Criteria: You may enter as many rows of search criteria as needed for the search by clicking the  button on the toolbar. Indicate for each row whether this item is 'Must Have', or required. A must have means that the criteria is required.
- To remove a piece of criteria, simply click the  button to the right of the criteria you wish to remove.
- To clear your selections and start over, click the button.

Below is an example of a typical search for employees. In this case, Baker's Acres is hiring and has specific requirements. We want to see what employees most closely match their criteria:




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Criteria Type	Value	Must Have?
Job Skills	Data Entry	<input type="checkbox"/>
Job Training	Cash Register	<input type="checkbox"/>
Job Training	Customer Service	<input type="checkbox"/>

Once selections have been made, click the  button to generate the search.

The search results will be displayed on the right-hand side of this window, indicating prospective employees that meet your search requirements:

Name	Address	Match %
Name: Mark Brandon Status: Seeking Employment	Address: Testing SPRINGFIELD, OH 45503 () -	100%
Name: Olivia Nixon Status: Employed Full Time	Address: 17511 Daleview Drive Lakewood, OH 44107 Distance: () - 55	100%
Name: Amy Kramp Status: Employed Full Time	Address: () -	67%

For QuickPrint reports from this tab, click the  button on your toolbar. These reports include the data retrieved from the search.

Below are examples of our Search Logic:

- **Must Have?:** If a criteria type and value are listed as ‘Must Have’, the search will only return employees who have that item. Even if they have other requirements, the Must Have will exclude them from the search.
- The employer/position requires a driver’s license and Customer Service training, and neither set as ‘Must Have?’ An employee has Customer Service training but no driver’s license.
- **Minimum Match % = 100:** The employee will not be listed because they do not have all of the employer’s requirements.
- **Minimum Match % = 50%:** The employee will be listed because they have 50%, or half, of the employer’s requirements.



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- **Minimum Match % = 75%:** The employee will not be listed because they do not have at least 75% of the employer's requirements.

Maximum Distance Search: The Job Matching tool can help you locate:

- Search for Positions – for a specific employee within a specified # of miles
- Search for Employees – for a specific employer/position within a specified # of miles

In this example, we are using the Search for Positions tab, using a specific employee. However, the process works the same way for the Search for Employees, using a specific employer/position. The following information is required:

- **People, General Tab:** On the General tab, the address must be entered. Press the GeoCode button to retrieve Latitude and Longitude data:

Latitude: Longitude:

- **Employers:** On the Employer Info tab, the address must be entered. Press the GeoCode button to retrieve Latitude and Longitude data:

Latitude: Longitude:

Using Maximum Distance in the Job Matching Window: With this information, you can now specify the maximum distance a prospective employee is willing to work. In the example below, Maximum Distance is set to 2. This means that Olivia is looking for a position within 2 miles of her home:

Criteria Type	Value	Must Have?
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

While this feature will work with other specified criteria, there are a few things to know about these filters and how they work together. The following are a few examples to help illustrate their functionality:



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There are filters that are 'hard' filters:

- Employer, Position, Minimum Match, Maximum Distance, Must Have on other criteria filters
- Others are all 'Soft' filters.

'Hard' filters are very literal in their selections:

- Maximum Distance is specifically looking at address information. It is not looking at Minimum Match %
- Minimum Match # is looking at criteria, so if none are specified, it will return nothing. Therefore, if you are looking only for jobs with a maximum distance of 2 miles, use only that. Leave minimum match at 0

Other examples: In this example, the employee wants a position within 2 miles of her home:

If I: Enter only 2 miles with 0% Matching and no other criteria: it finds a position 2 miles away.

If I: Enter 1 mile with 0% Matching and no other criteria: it doesn't find anything

If I: Enter 2 miles with a Matching of 100% and no other criteria: it does not find anything. This is because the Match % is a 'hard' filter and is looking at criteria types. Since none were specified, it cannot find a match.

If I: Enter 2 miles with a Matching of 0% and 'Must Have' criteria of position = cashier (which is my test position): It finds the position correctly. This is because the search meets the maximum distance criteria AND the must have position of cashier.

If I: Enter 2 miles with a Matching % of 0 and 'Must Have' criteria of position = bagger, it does not find anything. This is because while the maximum distance criteria is correct, there are no bagger positions within the specified 2 miles.

This document was written with the assumption that the security for this module/function is already in place. For additional information, please see the related set-up guide or contact your systems administrator.