Q&A – "Good Cause" Procedures

Webinar Series: December 5 – 7, 2012
December 27 – 28, 2012
January 2 – 3, 2013

1. **Q:** If customers can't attend orientation "just because", do ES staff add issues in TabE based on the customer's reason(s) for non-attendance?

   A: No – ES staff will not add any issues in TabE. If a customer can't attend orientation, you will reschedule them for another date and enter a statement on the EREA Requirements Form in TabE recording the reason for non-attendance. You will then enter an enrollment note in OJL and email the "Good Cause" email box with the appropriate information.

2. **Q:** Do we use the same form in TabE to record the statement for all of the "reemployment orientation" processes?

   A: Yes. You will use the EREA Requirements form in TabE for all orientations – Profiling Orientation, Job Search Workshops, REA and EUC.

3. **Q:** Where do you record information related to rescheduling for PO, JSW, REA and EUC?

   A: You will enter enrollment notes in OJL and take statements on the EREA Requirements Form in TabE for all processes.

4. **Q:** Is the process for PO, JSW, REA and EUC the same now?

   A: The process for each type of orientation will stay the same until you reach the point of rescheduling a customer that you have had contact with. At this point, you will follow the "Good Cause" procedures discussed in the webinar on slides three and four for all types – PO, JSW, REA and EUC. There are no changes to the steps that staff follow for reporting no shows when a customer does not call to reschedule.

5. **Q:** When does this new process take effect?

   A: The "Good Cause" procedures are effective immediately.

6. **Q:** What if a customer says they are sick and have no medical insurance so they can't provide any documentation for missing their originally scheduled appointment?

A: Simply enter a statement on the EREA Requirements Form in TabE recording the reason for non-attendance, update the CRC and email the "Good Cause" email box.

7. **Q:** What if you do not have access to TabE?

   A: Email Pam Hoskins and she will assist you in this process.

8. **Q:** What if someone reschedules after 3:00p? Do we wait until the next day to email the "Good Cause" email box?

   A: You will still send the email to the "Good Cause" email box after 3:00p, just remember that the email will not be worked until the following day.

9. **Q:** When asking why the customer did not attend their originally scheduled appointment – what if the customer says "it's none of your business" or "it is personal."?

   A: Don't press the issue. You will simply enter a statement on the EREA Requirements Form in TabE exactly as it was stated by the customer and UI will inquire further.

   NOTE: Staff should inform claimants that they are required to attend PO, REA, EUC and/or JSW services in order to receive benefit payments and that not all reasons for requesting a reschedule are considered valid. Furthermore, UI will contact the claimant and inquire further about details related to missing the originally scheduled appointment.

10. **Q:** Why are we selecting "Update, No Issue" when taking a statement related to rescheduling in TabE?

    A: Workforce Center staff are entering statements in TabE to record the reason for non-attendance of the originally scheduled appointment and then UI staff will add issues or make determinations when necessary about benefit payments.

11. **Q:** If a customer is not registered in OJL, do we ignore the TabE steps and only email the "Good Cause" email box?

    A: No, do not ignore the TabE steps. If a customer is not registered in OJL, you must still enter a statement on the EREA Requirements Form in TabE recording the reason for non-attendance, update the claim record card (CRC) and email the "Good Cause" email box.

    You must include the following in the Subject Line of the email –

- The group the claimant has been rescheduled to attend i.e. Profile Orientation, Job Search Workshop, REA or EUC
- First and Last name
- SSN

The body of the email should simply read: *"not registered in OJL"*

REMEMBER: you will need to track the reschedule date manually!

12. **Q:** Do "no shows" go to the "Good Cause" email?

    A: No. "No shows" are processed according to current procedures:

    - Profile Orientation and Job Search Workshop: *Memo #01-2010*
    - REA: *Memo #06-2010*
    - EUC: *Attachment A - EUC Reschedule Protocol 08-14-2012*

    NOTE: Each one of the above-mentioned procedure documents has parts that no longer apply – *the parts related to reschedules*. Follow the procedures in each document <u>until you get to the point of a reschedule</u> **then** you will follow the "Good Cause" procedures. Briefly, this translates as follows:

    - **Profile Orientation and Job Search Workshop:**

      "No shows" are reported via email (<u>PRF/JSW/POE@oesc.state.ok.us</u>) at the **end of each week**.

    - **REA:**

      "No shows" are reported via email (<u>PRF/JSW/POE@oesc.state.ok.us</u>) at the **end of each day**.

    - **EUC:**

      "No shows" are reported by adding an issue in TabE.

13. **Q:** Does the call center staff follow these same "Good Cause" procedure steps?

    A: No. Workforce Center staff (or UI Field Reps when applicable) will follow these procedures because they are the only staff that reschedule clients for PO, JSW, REA and EUC.

14. **Q:** How many times can we reschedule? Is current policy going to change for rescheduling?

A: Reschedule the customer each time they request a new date. Be sure to enter a statement in TabE, update the CRC and email the "Good Cause" email box. Current policy related to rescheduling for all groups – PO, JSW, REA and EUC – will be changing soon.

15. **Q:** Does TabE replace the spreadsheet we use to report "no shows" for REA and Profile Orientation?

    A: No. You will still report "no shows" according to current procedures. Only those individuals who have contacted you and requested to be rescheduled will be reported using TabE and the "Good Cause" email box.

16. **Q:** Do we still add an issue for EUC?

    A: Yes. You will only add issues for those EUC customers who were "no shows."

17. **Q:** If an issue was already added to TabE for an EUC customer who was a "no show," then the customer calls to reschedule – do we still remove the issue?

    A: No. Issues **will not** be removed by local Workforce Center staff. If a customer calls to reschedule after an issue has been added to their claim – take a statement in TabE, update the CRC and email the "Good Cause" email box with the appropriate information.

18. **Q:** Will REA staff follow the "Good Cause" procedures?

    A: Yes. The "Good Cause" procedures apply to all orientations – PO, JSW, REA and EUC.

19. **Q:** If a customer calls after receiving their orientation letter and says that they have returned-to-work, do we mark the services in OJL as "waived"? And do we record the return-to-work date anywhere?

    A: You will mark the services in OJL as "waived" and then record the return-to-work date in enrollment notes. You will also email the "Good Cause" email box with the appropriate information:

    Subject line of email: *Program (either Profile Orientation, REA or EUC), Claimant's first & last name, ssn*

    <u>Subject line example:</u> Profile Orientation, Kim Braddy, 567225678

    Body of email: *Claimant has returned to work at [enter name of company] effective mm/dd/yyyy*

20. **Q:** What do we do if an EUC customer calls with an "invalid excuse" for not attending?

    A: Follow current procedures for EUC "no shows."

21. **Q:** When a claimant is unable to attend a session, what goes in TabE?

    A: <u>It is important to have as many details as possible</u> in the TabE EREA Fact Finding Statement. Be sure to include dates, for example: "the claimant was sick from Mon 12/31/12 to Wed 1/3/13."

    If you cover the five W's – who, what, when, where and why – then you will likely have enough information.

    NOTE: See the *Fact-Finding Basics* tip sheet for more information.

22. **Q:** How many times do we reschedule a claimant for services?

    A: You will reschedule a claimant as many times as they request. Be sure to enter a statement in TabE, update the CRC and email the "Good Cause" email box each time you reschedule.

23. **Q:** Who do we notify when a claimant who formerly "no showed" has completed/attended their required services?

    A: You will notify UI per the following guidelines for those claimants who formerly "no showed" and have now completed their required services:

    - **Profile Orientation:** email a list of call-ins *who formerly "no showed" and have now* completed/attended to goodcause@oesc.state.ok.us , once a day between 4 pm and 5 pm. <u>Note:</u> Services in OJL must be marked as completed **before** emailing any lists.

      Staff must use the following call-in format:

      - <u>Subject line of email:</u> **Call-In Attendance for Profiling Orientation**.
      - <u>Body of email:</u> ssn, first and last name, and date completed.

    - **Job Search Workshops:** email a list of call-ins *who formerly "no showed" and have now* completed/attended to goodcause@oesc.state.ok.us , once a day between 4 pm and 5 pm. <u>Note:</u> Services in OJL must be marked as completed **before** emailing any lists.

      Staff must use the following call-in format:

      - <u>Subject line of email:</u> **Call-In Attendance for Job Search Workshop**.

- Body of email: ssn, first and last name, and date completed.

- **REA:** email a list of call-ins *who formerly "no showed" and have now* have completed/attended to goodcause@oesc.state.ok.us , once a day between 4 pm and 5 pm. Note: Services in OJL must be marked as completed **before** emailing any lists.

  Staff must use the following call-in format:

  - Subject line of email: **Call-In Attendance for REA Orientation.**
  - Body of email: ssn, first name and last name, and date completed

- **EUC:** email a list of call-ins *who formerly "no showed" and have now* completed/attended to goodcause@oesc.state.ok.us , once a day between 4 pm and 5 pm. Note: Services in OJL must be marked as completed **before** emailing any lists.

  Staff must use the following call-in format:

  - Subject line of email: **Call-In Attendance for EUC Orientation.**
  - Body of email: ssn, first name and last name, and date completed

NOTE: Workforce Center Staff will NOT remove any issues!

24. **Q:** If a claimant is listed as a "Failed to Report" and then they call later to reschedule, what do we do?

    A: Once a claimant calls to reschedule you will follow the new procedures: Take statement in TabE stating that customer called to reschedule and give the reason they missed originally scheduled group and then email the "good cause" email box.

25. **Q:** If the office is closed due to weather do we list the claimants that were scheduled for a group that day as "Failed to Report"?

    A: No. Just reschedule the claimant.

26. **Q:** Do we remove any stops?

    A: No. UI will be responsible for removing all stops.

27. **Q:** On the "Fact Finding Required" screen there is a CRC Inquiry and a CRC Update button. Which one do we use?

    A: Use the CRC Inquiry button.

28. **Q:** If a claimant has missed their scheduled group and has been listed as a "Failed to Report" and then shows up at a later time without an appointment and staff is able to complete the services at that time, do we list it as a "reschedule" and then list another service as "completed"?

    A: Yes. If a claimant stops in and inquires about completing services the same day and can be accommodated then this situation constitutes a reschedule. Enter a statement in TabE, update the CRC and email the "good cause" email box. Be sure to include in the TabE statement that the claimant completed all services. You will then need to update OJL so that the original services are marked as rescheduled and the new services are marked as completed.

29. **Q:** What is the process for returned letters?

    - **EUC Returned Letters:**

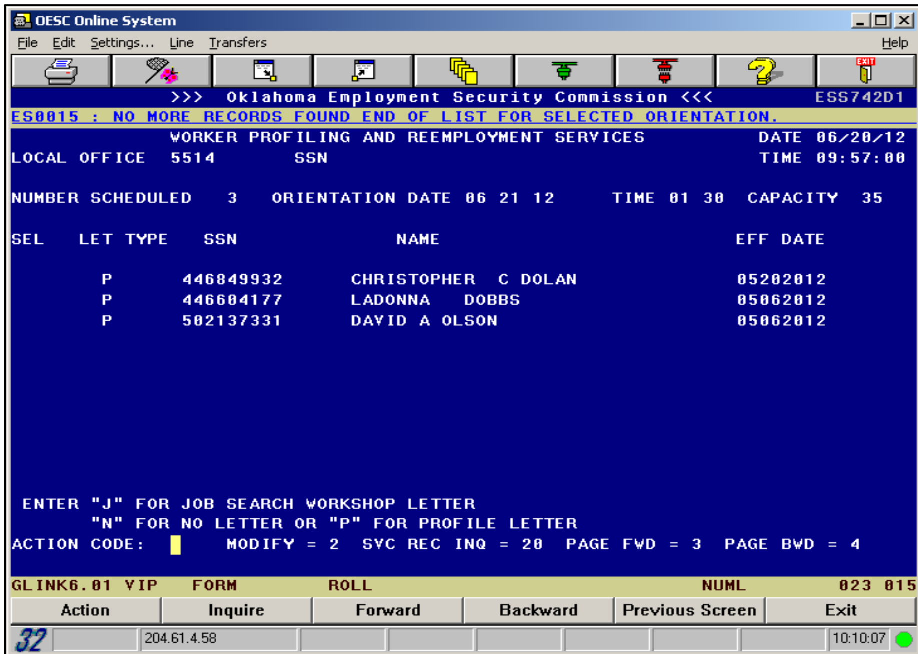
        a. Enter "Failed to Report" for the status of all services in OJL.
        b. Enter the No Show issue in TabE and update the CRC.
        c. Staff must write on the returned letter envelope "**EREA LTR Ret. by PO**" and the claimant's **social security number**.
        d. For offices that have a Xerox, place the envelope in the document feeder, select Network Scanning on the Xerox machine and select the Kofax or Streem option. Press start to send the document. <u>Only fax one envelope at a time.</u> Shred the envelope.
        e. For offices that do not have a Xerox, fax the envelope to 405-962-7524. <u>Only fax one envelope at one time.</u> Shred the envelope.

    - **Profile Orientation, REA and Job Search Workshop Returned Letters:**

        a. Enter "Failed to Report" for the status of all services in OJL.
        b. Staff must write on the returned letter envelope "(**Name of Group i.e. Profile Orientation, REA <u>or</u> Job Search Workshop) LTR Ret. by PO**" and the claimant's **social security number**.
        c. For offices that have a Xerox, place the envelope in the document feeder, select Network Scanning on the Xerox machine and select the Kofax or Streem option. Press start to send the document. <u>Only fax one envelope at a time.</u> Shred the envelope.
        d. For offices that do not have a Xerox, fax the envelope to 405-962-7524. <u>Only fax one envelope at one time.</u> Shred the envelope.

30. **Q:** What is the name of the screen in GLink that we can use to identify the <u>correct effective date</u>?

    A: The screen you can use to identify the correct effective date is called the "Worker Profiling and Reemployment Services" screen. See the picture below:



31. **Q**: If a client wants to reschedule from one office to the next, and it's approved, who does updates services, enters the statement in TabE, and does the Good Cause email?

    A: The sending office will:
    - Mark original services in OJL accordingly, either failed to report or rescheduled
    - Email Pam Hoskins to change the client to the new office

      Note: *It is important that all services in OJL have been updated appropriately <u>BEFORE</u> contacting Pam Hoskins to change the client to the new office!*

    The receiving office will:
    - Enter statement in TabE, update the CRC and email the good cause email box with all appropriate information. The reason, of course, for rescheduling is that the claimant "lives closer to XX office."
    - Enter and update new services upon completion
    - Send the appropriate email upon completion of services (according to the procedures in the Q&A) **if the client was originally a FTR**

Reminders!

1. Processes for *PO, Job Search Workshops, REA and EUC* **remain the same until you reach the point of rescheduling an individual you've had contact with**:

    a. Scheduling in Glink
    b. Notifying UI of "no shows" (applicable to those customers who did not show up or did not contact you to be rescheduled)
    c. Providing appropriate services when/if claimant arrives for scheduled services
    d. Entering services in OJL

2. Changes for *PO, Job Search Workshop, REA and EUC* begin **at the point of rescheduling an individual you've had contact with:**

    a. Rescheduling is now a formal "on the books" process
    b. UI will be notified via the "Good Cause" email box of all rescheduled dates for PO, Job Search Workshop, REA and EUC
    c. Must enter rescheduled dates in OJL
    d. Statements will be entered in TabE and the CRC will be updated

3. When customers ask about benefit payments….

4. Be sure to only send **one claimant per email** to the "Good Cause" email box.

5. Staff received a document titled *Adequate Reasons for Failing to Attend a Scheduled Group – Final*. This document was written with instructions and/or language geared toward UI staff. The procedures outlined in the webinar series titled *PO, Job Search Workshop, REA and EUC "Good Cause" Procedures* explain this process from a Workforce Center staff perspective.

6. When taking statements in TabE, **don't use acronyms** as UI staff may not be familiar with all of the acronyms or abbreviations used in the Workforce Centers.

7. It is critical to **identify the correct claim effective date before taking a statement in TabE**. To help ensure you have the correct date, print the list of scheduled customers from GLink. **The list of scheduled customers in GLink has the correct claim effective date noted.**

8. TabE Fact Finding Statements:

    It is critical to get specific, detailed information when taking a statement in TabE. Include information such as dates, length of time a claimant was sick or out-of-town together with the beginning and ending dates, why the claimant may have been out-of-town, if the claimant searched for work while they were away, etc. The questions below are a good template for getting an appropriate level of detail from a claimant. See the *Fact-Finding Basics* tip sheet for more information.

<u>Claimant calls to reschedule</u>

Begin by asking **three basic questions**:

- What group did the claimant fail to attend?
- What was the date of that group?
- Why was the claimant unable to attend as required?

There are two basic categories that claimants tend to fall under **– never received the letter/notice** <u>OR</u> **unable to attend**.

Ask the following additional questions based on the category:

Never received the letter/notice	**Was not able to attend as required**
– Do you want to reschedule? (set up a date and time)	– What was the issue that caused inability to attend?
– Is the claimant's address correct according to what is entered in TabE? (This is a good time to verify their address in OJL)	– How long did this issue last? (from and thru) *Example: claimant was sick from 1/22/13 thru 1/24/13.*
– Has the claimant received other mail at this address?	– Did the claimant complete his/her work search during this time?
– How did the claimant discover he needed to attend this group?	– Has the claimant rescheduled before? Why?

9. Good Cause Emails:

Must include the following in the <u>Subject Line</u> of the email **–**

- The group the claimant has been rescheduled to attend i.e. Profile Orientation, Job Search Workshop, REA or EUC
- First and Last name
- SSN

The body of the email should simply read: *"took statement in TabE"*

NOTE: If a claimant is NOT registered in OJL, you must also include the statement *"not registered in OJL"* in the body of the "Good Cause" email.

10. If a customer comes in to the center without an ID, staff **must still provide the customer with PO, REA or EUC services**. There is no ID requirement in order to complete LE or UI services such as these. The requirement to have an ID is for enrollment in WIA Adult services. *While desirable, dual enrollment does not have to be done when the customer reports for a scheduled group such as PO, REA or EUC.* Staff should complete the scheduled group activities and then direct the customer to bring their ID with them next time they visit the center. The customer can be enrolled in WIA Adult at that time.

11. You may contact the following for assistance:

    a. *Kim Braddy, kim.braddy@oesc.state.ok.us, 557-5394*
    b. *Shea Cook, shea.cook@oesc.state.ok.us, 557-5395*
    c. *Pam Hoskins, pam.hoskins@oesc.state.ok.us, 557-5462*
    d. *Jon Eller, jon.eller@oesc.state.ok.us, 557-7149*
    e. *UI Tech Staff, UITechStaff@oesc.state.ok.us, 557-7220*