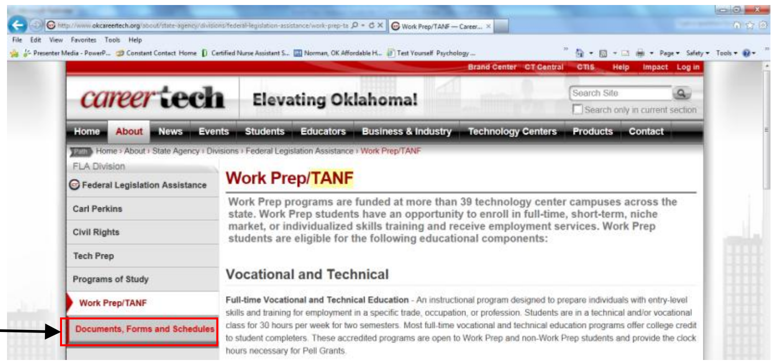
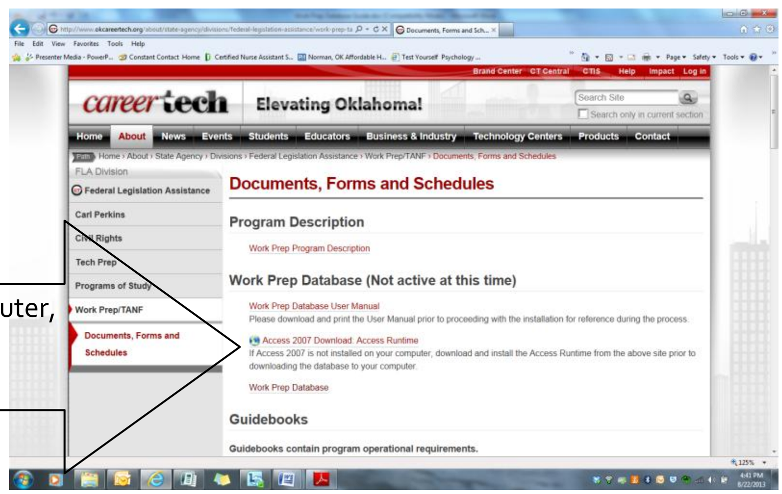
Downloading

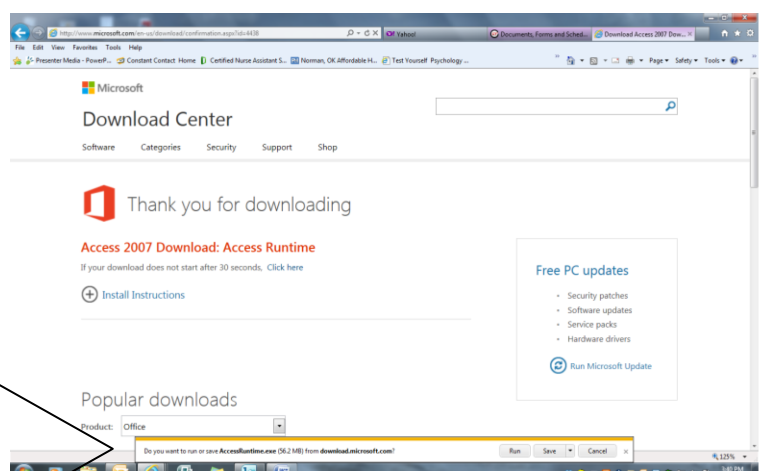
the Work Prep Database

- When you go to the Career Tech Website, go to the Work Prep/TANF page and find the "Documents/Forms/Schedules" file. Click to open.

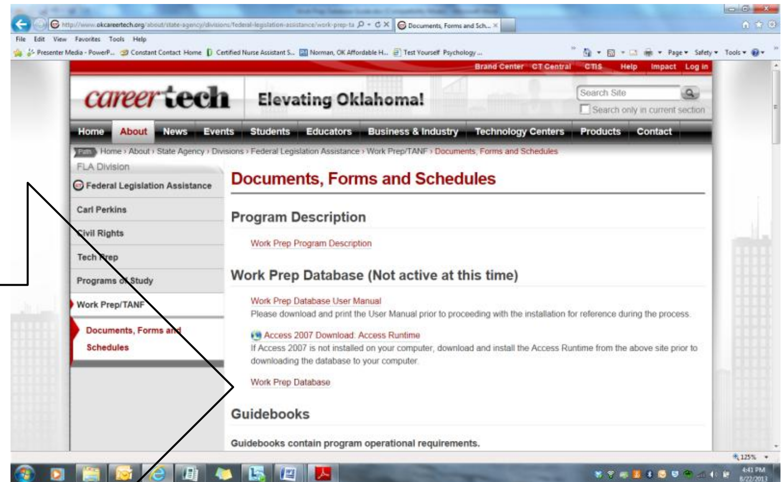




If Access is **not** loaded on your computer, click here first to download Access Runtime.

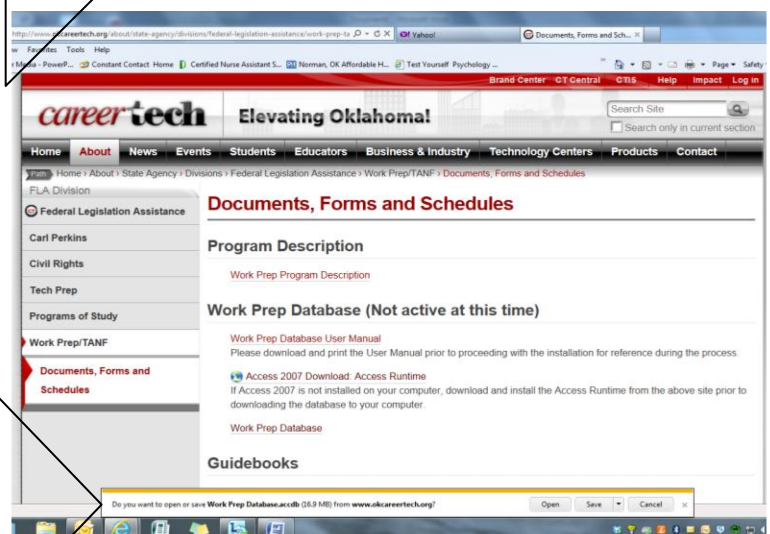


Click "run" and follow further instructions.



Once Runtime has been installed, return to site and click on Work Prep Database to download.

If Access is already on your computer, begin your download process here.



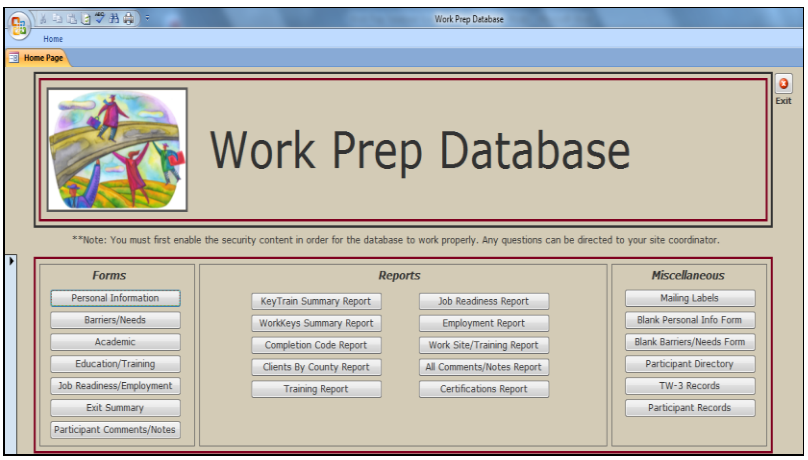
Click the 'save' down arrow, choose 'save as' and identify where you want the database to be saved. You can save to your desktop, flash drive, hard drive or shared drive, if applicable.

You may find that the database is slow after the initial install process. This should improve once the registry is updated with the application.

INTRODUCTION

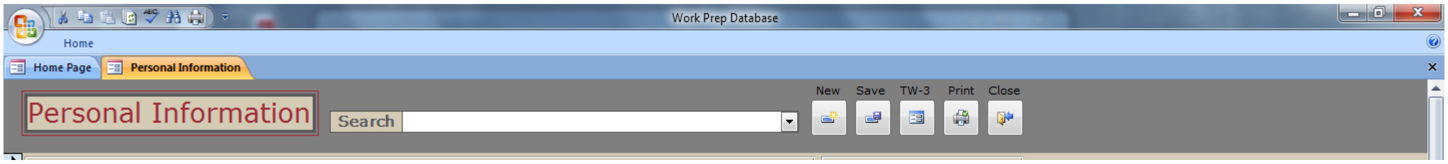
The WorkPrep Database is a tool designed to be a centralized location for participant information and reporting. It is designed as a supplement to the State TANF report located on the Career Tech website. The WorkPrep Database is site-specific and designed to align with yearly evaluation requirements. The reports generated may also be useful in identifying trends and needs within your program.

- When you install the database, you will need to follow the prompts for proper installation. You do not need to have Access on your computer to run this program. You will, however, need to install the Access Runtime package included in the Work Prep Database folder on the Career Tech site.
- If external updates are necessary, you will be able to download updates database from the state site. Your existing data will not be affected by any updates.
- This database will be sent with the navigation pane hidden to ensure that format and operation remain safe from unintentional changes.
- The first screen you will encounter upon installation is the "Home Page". Note that the Microsoft ribbon will not be visible. However, shortcuts are visible by the Microsoft button.

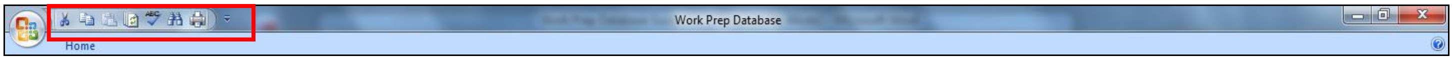


- The first section of the Home Page provides individual "Forms" that align with a participant's chronology in the program. This is the primary method of entering data on a participant's progress in the program.
- A second section provides a "Reports" function that summarizes data as required for annual reviews or internal usage.
- A third section, entitled "Miscellaneous", provides resources and access to important tables.
  Forms are:
- Personal Information – Basic participant information
- Barriers/Needs – Review of potential barriers and current needs
- Academics – Record of participant scores on various assessments
- Education/Training – Documentation of previous education, current training, and workbased learning activities
- Job Readiness/Employment – Record of job SEARCH activities and employment information
- Exit Summary – Record of exit date, completion codes, and certifications.
- Participant Comments/Notes – all forms have comments/notes sections in which additional information may be recorded. By choosing this option, you are able to view and print an individualized summary of all comments made for an individual participant.

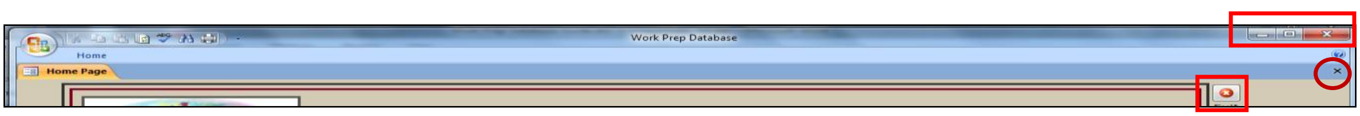
GETTING TO KNOW THE TANF TOOLBAR



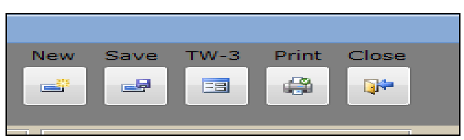
The TANF Toolbar provides navigation and editing functions for the database. Once you have learned the location and function of the toolbar tools, operation of the database will be very simple. The following instructions will divide the toolbar into sections.



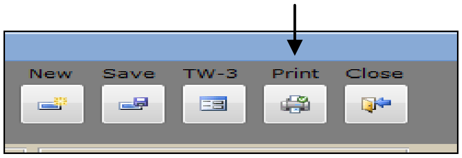
- In this section of the toolbar, you'll find
    - Cut, copy, and paste icons – These functions enable you to copy emails or transfer data to the forms.
    - Refresh icon – When information has been entered into any form and saved, this function will allow others working within the database to see changes you have made. If you have entered a new client, you will need to refresh the page to see their name listed in the search box.
    - Spell check icon – For checking accuracy in comment sections, highlight the comments and click on this icon.
    - Find icon – This function allows you to search data within any report to find a particular participant record. Enter the last name and the name will be highlighted within the report.
    - If you prefer the Microsoft ribbon visible, you can click the down arrow to the right of the print icon on the shortcut menu and scroll to "Minimize Ribbon". Uncheck the statement and the ribbon will be visible. The shortcuts will still be visible above the ribbon.



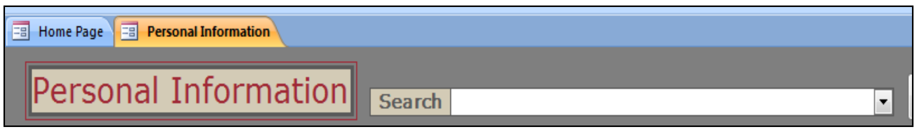
- The minimize, restore down, and exit buttons operate normally. It is important to note that clicking on a red 'x' will completely close out the database. The black x (circled above) will close out a form and return the user to the Home Page. If on the Home Page, do not click this 'x'.



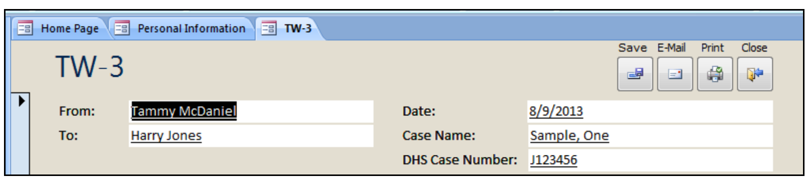
- When inputting a new participant, go to any of the forms and click on the **"NEW"** button on the TANF Tool Bar. This will open a blank record.
- Once information is entered, be sure to click **"SAVE"** before closing that particular form. Go to your shortcut menu and "Refresh" to ensure data will be visible for other users.
- The **TW3** template is accessible from any form by clicking the 'TW3' button on the TANF Toolbar. (Note that this is a new DHS-TW3 format.) When you open the TW3 from any FORM, it will be automatically populated with the name and case number from the participant form. Once the TW3 is complete, "SAVE" and "PRINT" the form. You will also be able to email the TW3 directly to the worker from the TW3 page. (see TW3 instructions.) Once you "CLOSE" the TW3 form, data will be saved in the TW3 Record, but the actual TW3 form will no longer be accessible in the database.



- All <u>forms</u> should be printed by clicking the **"Print"** button on the TANF Toolbar at the top of each individual form page. NOTE: If you print any participant FORM from the print shortcut (above), it will print out multiple participant reports. The shortcut "Print" function is used for printing reports and miscellaneous documents only.
- Exit forms by clicking "CLOSE" or click the small black "x" located just above the vertical scroll bar on the far right. This will take you back to the HOME SCREEN. NOTE: In order for you to see any new participants in the search box, you will need to "save" and **refresh** using the shortcut menu OR close out the form and reopen.

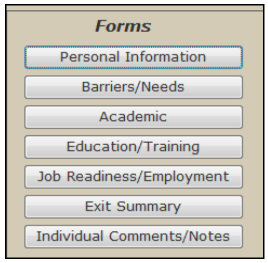


- When updating existing participant forms, go first to the form you want to update, click on the "SEARCH" box and choose the name of the participant you are updating. You may also begin typing the last name in the "Search" box to search records. Either process will take you to an automatically populated form that includes any information previously entered. You will follow this process when working on <u>any</u> forms page. **Be sure to save each time new data is entered.**



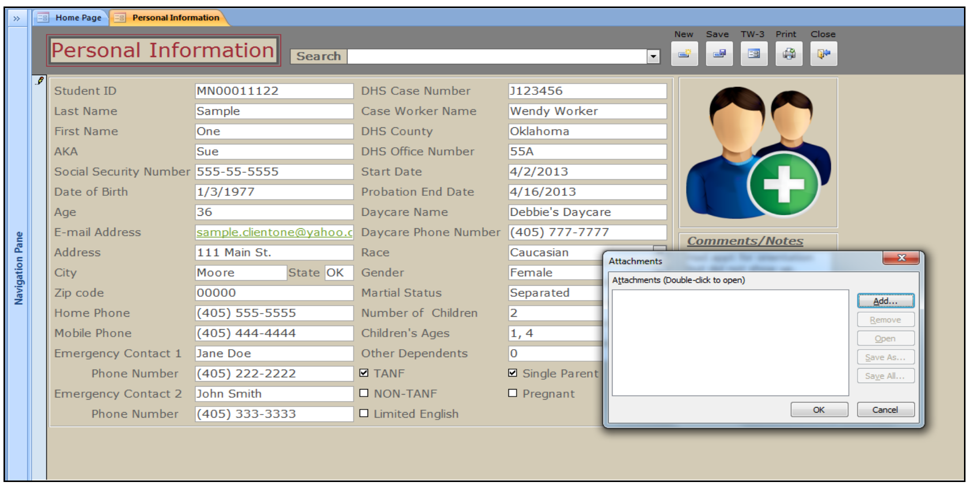
- You are able to email the TW3 from the TW3 page by clicking on the "EMAIL" button. Once the email opens, insert the worker email address and send. If you forget to print the completed TW3, but have emailed the form to the worker, you can go to your email "sent" box to access the completed form.
    - Note: Each time you open a TW3, it will create a record within the TW3 table, whether you complete the form or not. Please refer to the TW3 Record instructions in the Miscellaneous section of this guide.

USING FORMS



The WorkPrep Database home screen is the location for all FORM buttons. Data for all reports is collected from information gathered in the six (6) forms provided. You may access any form by clicking on the labeled form button. Once the desired form is open, go to the "SEARCH" box and click on the participant of choice or enter a new participant by clicking the "New" button on the TANF toolbar.

- ***"Personal Information" form:***



  - Information entered on this form represents initial intake data. Information can be updated as needed but only most recent data will be saved in the database. Note that the "children's ages" box allows you to check multiple boxes. You may also directly email a participant by clicking on the email address they have provided.
  - The box with the graphic enables you to add a picture of each participant. To add a picture, <u>double click</u> on the image to get the "attachments" box and click "Add". This action will take you to your files where you can choose a picture from an internal or external drives. Simply click on the image you want to include and click "ok". Your image will appear in the image box. You may upload multiple images over time but the most recent image you insert will be the default image that appears upon opening the form. To see previous images, single click on the picture and use the arrows that appear above the picture to scroll through your collection.

- ***"Barriers/Needs"*** *form:*

				Support Services Notes
Financial Aid Eligibility	No => See Comments	Counseling	No Services Needed	Have referred to DHS for daycare list. Also connected her with former client who has daycare. Flex request made to DHS for eye exam. In default on loan but has made payment arrangements. Lives with aunt (professor at OU). Gave referral to Women's Resource Center for DV counseling.
Children with Special Needs	No	Drivers License	No Services Needed	
Daycare	Services Needed	Transportation	No Services Needed	
Housing	No Services Needed	Domestic Violence	Past Hx	
Clothing	No Services Needed	Protective Order	N/A	
Vision	Services Needed	Substance Abuse	No Services Needed	
Dental	No Services Needed	Adult/Juvenile Offender	No	
Health/Medical	No Services Needed	Disabilities	Not Disabled	

  - There are drop down options for "Services Needed" or "No Services Needed". These selections indicate needs that can be met by referrals or direct services through your program. Ex: If a participant needs assistance with finding a daycare, you would select "Services Needed" and document supportive service strategies in the "Support Services Notes" box to the right of the form. It is important to remember that if a participant has needs or barriers, you should document any referrals, plans for referrals, or other details related to that need.
  - All comments made in the "notes" section on any form are saved and reported on the "Participant Comments/Notes" in the "Forms" section and the "All Comments/Notes" in the "Reports" section.

- ***"Academic"*** *form*

TABE	Pre	Post	KeyTrain	Initial	Final	CAPS/COPS/COPES
Date of Testing	1/17/2013	4/10/2013	Date of Testing	9/26/2012	12/31/2012	Science Skilled; Outdoor; Service Skilled
Reading	10.8	12.9	Applied Math	3	5	
Math Comp	9.4	12.9	Locating Info	3	5	
Applied Math	8.2	12.9	Reading For Inf	6	6	
Language	9.9	12.9	WorkKeys Level	Silver		Comments/Notes
Vocabulary	10.3	12.9	Initial Assessment	Compass Diagnostic (R-33, W-22, M-11)		
Lang Mech	9.9	12.9	Final Assessment	Compass (R-99, W-99, M-99)		
Spelling	8.4	12.9				
Total Math	8.8					
Total Battery	9.6					
Woodcock-Johnson	No		Accommodations:			
IEP/504	No					

  - "Pre" TABE scores are typically scores that come as a part of the DHS referral process. If your program provides for a TABE post-test, you will record those scores in the appropriate box under "Post".
  - "Initial" KeyTrain scores are also typically provided upon referral. "Final" scores, test date, and WorkKeys levels can be updated as many times as needed. <u>However, only the most recent update will be saved in the database.</u>
  - "Initial Assessment" and "Final Assessment" text boxes are provided for documentation of any other testing your school may provide (ex. Compass, Accuplacer, etc.)
  - "CAPS/COPS/COPES" scores may be recorded in the comment box provided. The detail in which you record that information is up to each program. Remember that the more detailed reports of all testing will be provided in hard copy and will be on file.

- ***"Education/Training"*** *form:*

DHS Case Number	H036036	*Comments/Notes*
Last Name	Coqui	Attended MetroTech for 1 month; did not enter training program. In default - pmt arrangements made.
First Name	Veronica	
Post Secondary Education	Some	
Other TANF Programs	Yes => See Notes	
Financial Aid Eligibility	No => See Comments	
Career Tech Scholarship Eligible	☐	
Career Major	CNA/AUA	
College Credit Hours (if any)	3 hours for Med Term	
Reviewed Continuing Education Plan	☑	

  - If a participant has post secondary education, you may want to note details in the "Comments/Notes" box on the top right. For example, here is where you would also note any college credits accrued prior to entrance to your program, certifications, degrees, etc. After you enter the "Career Major" information, you will note any "College Credit Hours" available through your school's career major.
  - The "Reviewed Continuing Education Plan" check box is provided as a reminder that each participant should have a review of career ladders within their career path and documentation that they have been given information and strategies for continued education upon completion of your program.

Education Component 1	Descriptor	Short-Term Training/internship	*Comments:*
CIP Code 51.14	Activity	CNA/HHA + Internship	Excellent gpa and attendance.
	Related To Training	☐	
	Site Name	Rambling Oaks — Public/Private: Public	
	Start Date	4/23/2012	
	End Date	8/23/2012	
	Hours/Week	32	

  - There are six (6) "Education Components" provided for documentation of **core** education and training activities. Ex. If a participant is in full-time training for thirty (30) hours per week, you will choose "Full-time Training" from the "Descriptor" drop down box. You will then provide the name of the training program in the "Activity" box. Note that you are able to choose multiple "Descriptors" if there is a combination of core activities. In all cases, you can insert more detail in the "Activity Box."
  - A link to Career Tech's "CIP Codes" is provided for each "Education Component." Once you have accessed the CIP code list, you are able to copy and paste it into the text box next to the link.
  - If a participant is in an internship or any off-site learning environment, you will provide specifics in the remaining text boxes provided in the "Education Component" box.
    - **Note: Only "core" activities of 20 hours or more should be listed in the "Education Component" boxes. If you want to record noncore hours that run concurrent with an education component, you may document that information in the "Comments" box next to each core education component.**

- ***"Job Readiness/Employment"*** *form:*

DHS Case Number	H036036
Last Name	Coqui
First Name	Veronica
Job Readiness	Interview Skills, Job Search, Resume, Sample Application, Workplace Skills
Job Search Plan	Full Time 30hrs/Week
Job Search Start Date	12/6/2012
Date of Initial Fulltime Employmen	12/21/2012

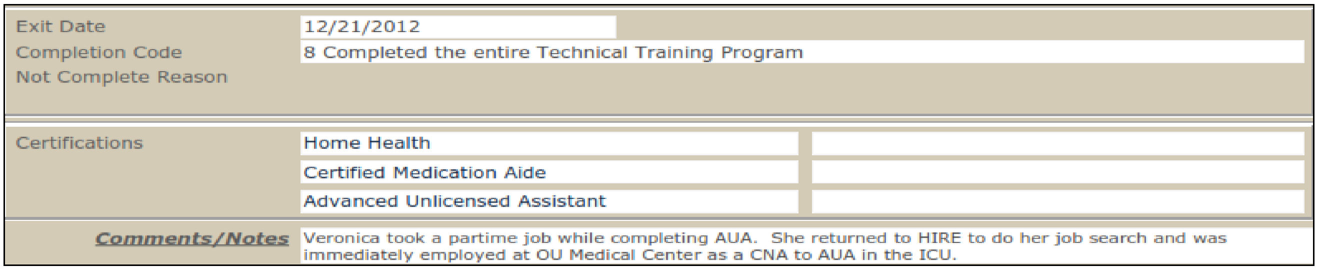
  - The first section of this form allows for documentation of completed job readiness activities. A drop down box allows you to check multiple activities.
  - The "Job Search Plan" notes how job search will take place (i.e. full-time, in conjunction with internship or work, or a customized approach.) You are able to check a box and insert further details in the same box.
  - The initial job search start date is entered in this portion of the form, as well as the date of the first full-time employment. This will assist with documenting the amount of time it takes for each client to obtain related, full-time employment.

	Employer 1	Employer 2	Employer 3	Employer 4
Employer	Sooner Health Serv			
O*NET Code	29-2061.00			
	O*NET Website	O*NET Website	O*NET Website	O*NET Website
Phone	(405) 321-7400			
Start Date	7/15/2013			
Benefits	☑	☐	☐	☐
Job Title	LPN			
Job Related	☑	☐	☐	☐
Salary	$18.00			
Pay Period	Hourly	Hourly	Hourly	Hourly
Hours/Week	40			

Transitional Services Comments

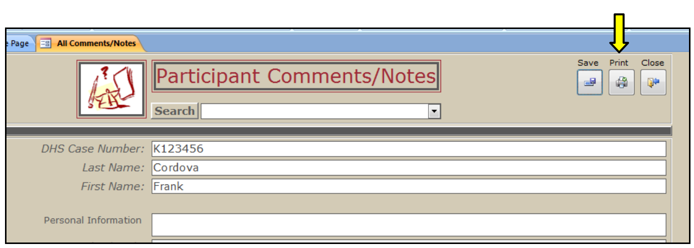
  - The second section of this form provides for the documentation of employment. Note that the form allows for multiple placements. If a student obtains part-time employment while in school or returns to your program for placement assistance due to termination, you will have options to document up to four (4) placements. It is recommended that you create a **new** record for students returning on a formal referral from DHS. (sent with a new TW2/3) The new record name will have a "2" after the last name to indicate a returning student.
  - By clicking the "O*NET website" link, you'll be taken to the O*NET site where you will be able to access the appropriate code, copy, and paste it into the O*NET box.
  - It is important that you document any "Transitional Services" that you have provided to the participant as they have moved to employment.

- ***"Exit Summary" Form***

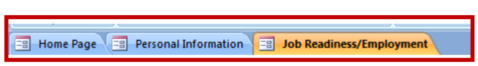


  - This form allows you to record the participant exit date, completion code, and reason for non-completion, if applicable. "Certifications" are also noted on this form. There are three ways to identify and record certifications:
    - Begin typing the certification name which will find similar names in the list
    - Click on the box and scroll through all available certifications
    - Override the list by typing in the certification name
  - Comments about the participant's overall success in the program, awards, concerns, etc. may be recorded in the "Comments/Notes" section.

- ***"Participant Comments/Notes" Form***
  - This is a summary of comments and notes made on the six (6) forms. **It is important that you print this summary from the "Print" button on the TANF Toolbar. Other print functions will print multiple participant comment reports.** Though this information comes from the multiple forms, you may also enter data directly onto this form in the desired comment box. Newly entered data will also be reflected on the related form. If entering data onto this form, information will be visible with the scroll function. However, the printed version will show all comments in expanded boxes.



It is recommended that you print out hard copies of all forms for participant files.



- Note that if you do not "CLOSE" a form and use the 'HOME PAGE' tab to go back to the home screen, then the form will remain open and a tab will be visible above the TANF TOOLBAR. When entering assorted data, you may choose to leave forms open to allow for toggling between pages. In most cases, it is best to always "SAVE" and "CLOSE" a form before opening another.

USING THE REPORT SECTION

The WorkPrep Database includes various reports that can be helpful in participant staffing, analysis of program trends, and preparing for annual reviews and evaluations. **When printing reports, print from the icon on the shortcut menu.**

- **Key Train Summary Report** provides comprehensive list of all participants and KeyTrain/WorkKeys results.
- **WorkKeys Summary Report** provides cumulative totals of each level of the WorkKeys. This report does not provide individual participant information.
- **Completion Code Report** categorizes participants by completion code and includes the reason for leaving the program prior to completion.
- **Participants by County Report** provides a breakdown of all participants by county office, worker, and case number. In counties with multiple offices, specific office numbers will also be indicated.
- **Training Report** provides participant by participant reporting of all education components and CIP codes (if applicable) as entered on the Education/Training form.
- **Job Readiness Report** provides an all-participant report of job readiness activities.
- **Employment Report** provides a report of all participants and placement data. Information includes job search start date; employment date; hours per week; place of employment; salary; benefits; and related/unrelated status. It is suggested that you input all employment that may take place during the participants' involvement in your program. However, the "Job Search Start Date" and "Date of Employment" for **full-time** employment are required for TANF program review purposes.
- **Work Based Training Report** provides a listing of all internship/volunteer/workbased learning sites per participant. The report also includes public/private options for each site.
- **All Comments/Notes Report** includes comments and notes that have been entered on ALL participants' forms. This report may be helpful when staffing all participants within your program. The report is sorted by county office and number.
- **Certifications Report** documents all certifications attained through participants' education and training. This information has been gathered from the Exit Summary.

USING THE MISCELLANEOUS DOCUMENT SECTION

The **Miscellaneous** Document Section provides:

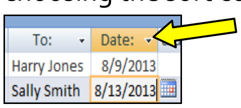
- **Mailing Labels** for all participants within your program's database. The format is set up to meet postal guidelines. Use Avery Form 5662/8662 for labels.

- **Blank Personal Information Form** allows you to print a copy of the form that could be completed in hard copy form and entered into the database at another time. If given to a participant to complete, it will require that you review the form with them. Some information may need to be entered by staff.

- **Blank Barriers/Needs Form** is provided should you prefer to fill out a hard copy when interviewing a participant. Information may be entered at a later time.

- **Participant Directory** provides a listing of participant contact data, including emergency contact information.

- **TW-3 Records** provides the table on which all completed TW-3 information is stored. You will be able to sort by date, client last name, worker, etc. by clicking on the arrow on the header of the column of your choice and choosing the sort command.

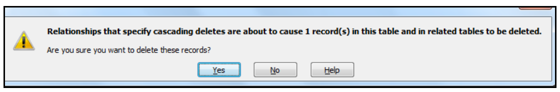
  This table should be used for reference only. We do not suggest trying to print this information due to the expansive nature of the table. NOTE: Anytime you open a TW3 from a participant form, it will create a TW3 record – with or without information. You should frequently review the TW3 records to ensure that only completed TW3s are included on the table. **To delete an incomplete record, follow the "Deleting Records" process on the next page.**

- **Participant Records** provides the table on which all client information is stored. You will use this table for deletion of records. You may also sort information and insert/update data from this table. All changes you make on this table will be reflected on the related form.

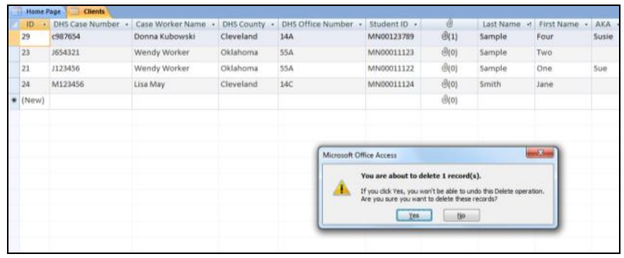
DELETING RECORDS

The database may be maintained from fiscal year to fiscal year. However, it is best for you to delete former participants from the database at the end of each fiscal year. (see "End of Year" process below)

You may also have a need to delete a participant's record if they do not complete your probationary period of time and are a "non-start". In this case, be sure to note comments on the appropriate FORMS and print out hard copies of the record for future reference. Then follow the procedure for deletion.



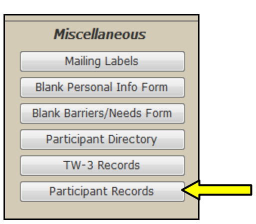
or

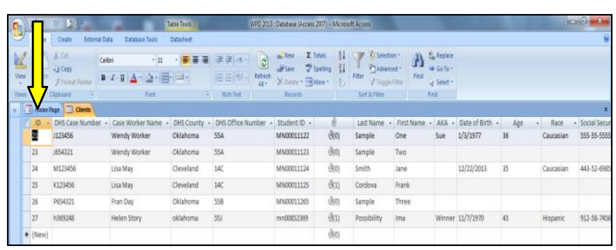


To delete a student record, go to the Home Page, Miscellaneous section and click on PARTICIPANT RECORDS. Find the client record you want to delete, click on the first column of that participant's record. The row will be highlighted; hit "delete". It will ask if you want to delete a record. Click "yes" and the record will be deleted. Multiple records (if grouped together) may be highlighted and deleted by clicking on the first record, holding down the 'shift' key and then clicking on the final record you want deleted. Hit 'delete'. Again it will ask you to confirm that you want to delete that particular number of records. Click 'yes' or 'no' as desired.

END OF YEAR Process:

- If you wish to save the database as a separate record each fiscal year, you will need to follow this process. Fiscal years run from July 1 to June 30 so most likely you will close out the current database in late June.
  1. Open the current database and 'save as' the current fiscal year (ex. File name: 'DB FY13-14'). You may save to your internal drive or to an external drive.
  2. You will then "Save as" again, but **do so under the file name of the NEW fiscal yea**r (ex. File name: 'DB FY14-15') This will be your <u>new</u> database for the new fiscal year so save it to the appropriate location.





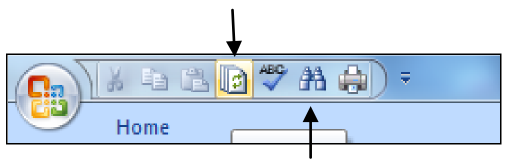
  3. In the NEW database (ex. DB FY 14-15), go to the Miscellaneous section of the Home Page and click on PARTICIPANT RECORDS. Highlight and delete all students who have exited your program, using the process for deleting records. The only students remaining should be students who are still active in your program as of July 1, 2014.
  4. 'Save as' once again, confirming that the file name represents the new fiscal year.

HELPFUL TIPS and REMINDERS

- If a participant returns to your program on a new referral from DHS, we suggest that you begin a new record for them. If it is within the **same** fiscal year, you will need to add a "2" after their last name when you initiate the new form. This will enable you to choose the correct record when doing a "SEARCH".

- Multiple users are able to enter data concurrently; however, you may have issues if entering data for the same client on the same form. It is best to avoid this practice to ensure data is saved correctly.

- Once data has been entered, always hit "save". Once saved, go to the "refresh" icon on the shortcut menu. This will ensure that the data is visible for multiple users. An alternate method would be to "close" the form and reopen.



- When working with a report, such as the directory, you can click on the "find" icon on the shortcut menu and type in the last name of the participant of choice. This will locate that particular student and highlight the name.

- In opening the database from a shared file, you may see two databases open. This indicates that the file is open by another user. One file will have a lock icon on it and/or "laccdb" at the end of the file name. You'll also notice the file sizes are different. You will always work from the unlocked, accdb, larger file. Make sure you 'refresh' all data so it will be visible to all users who may have the file open.