SARA

WIOA Service Provider Training

What will be covered:

- What to expect from SARA?
- Where is SARA located in EmployNV?
- How and why should I update My User Profile and Signature?
- Where do I find Alerts and what are they?
- When and why do I use SARA?
- What Tools are available for SARA?

What can SARA do for me?

SARA can:

- Ensure clients receive timely communication
- Ask specific questions and get responses from the client and notify me
- Send me an Alert if the client needs assistance
- Allows for continued contact with the client regarding training classes, job referrals, and employment
- Document detailed Case Notes in EmployNV
- Schedule appointments with my clients and sends out reminders one-day prior
- Allows for bulk communication with clients in my case load to invite them to special events or Job Fairs
- Allows posting of Case Notes to multiple clients in my case load all at once
- Allows for documents to be collected from clients
- Allows for work to be done on my behalf 24/7 without being reporting to the Labor Board

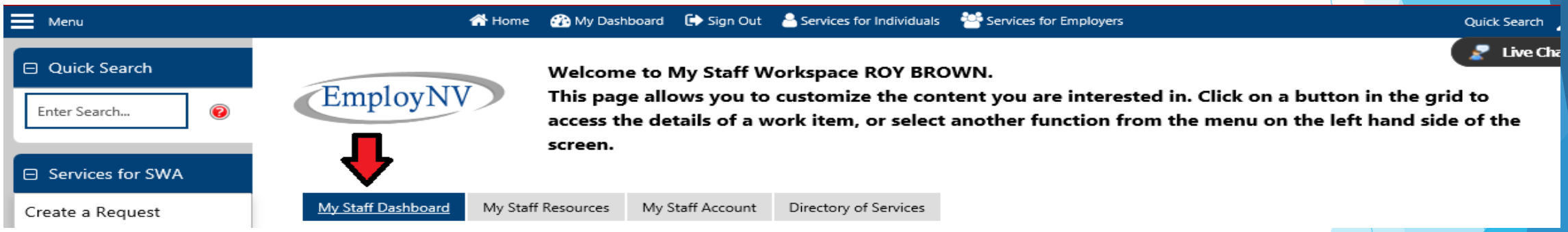
What do I have to do for SARA?

- Don’t keep SARA a secret
  - Tell client’s about SARA verbally
  - Share the SARA flyer
- Pay attention to SARA
  - Look at and take action on SARA Alerts daily
  - Pay attention to the client Track assignments in SARA
- Don’t keep her all to yourself
  - Share client’s with other staff and agencies, if requested or determined appropriate

Accessing SARA

There are 2 ways to access SARA through EmployNV

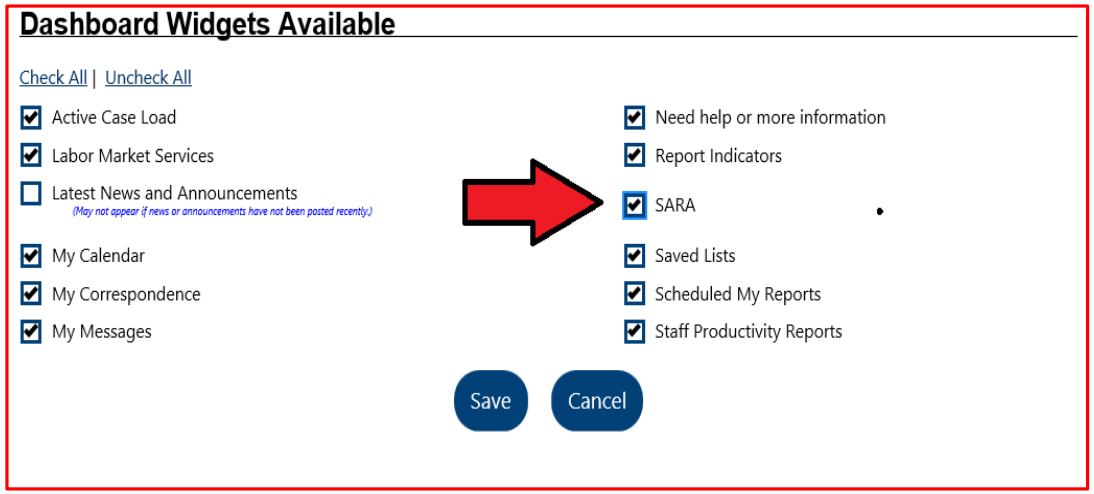
The first way is from EmployNV's Dashboard:



At the bottom of the Dashboard, select **<u>Configure Dashboard Widgets</u>**

Checkmark the box next to SARA and click **Save**

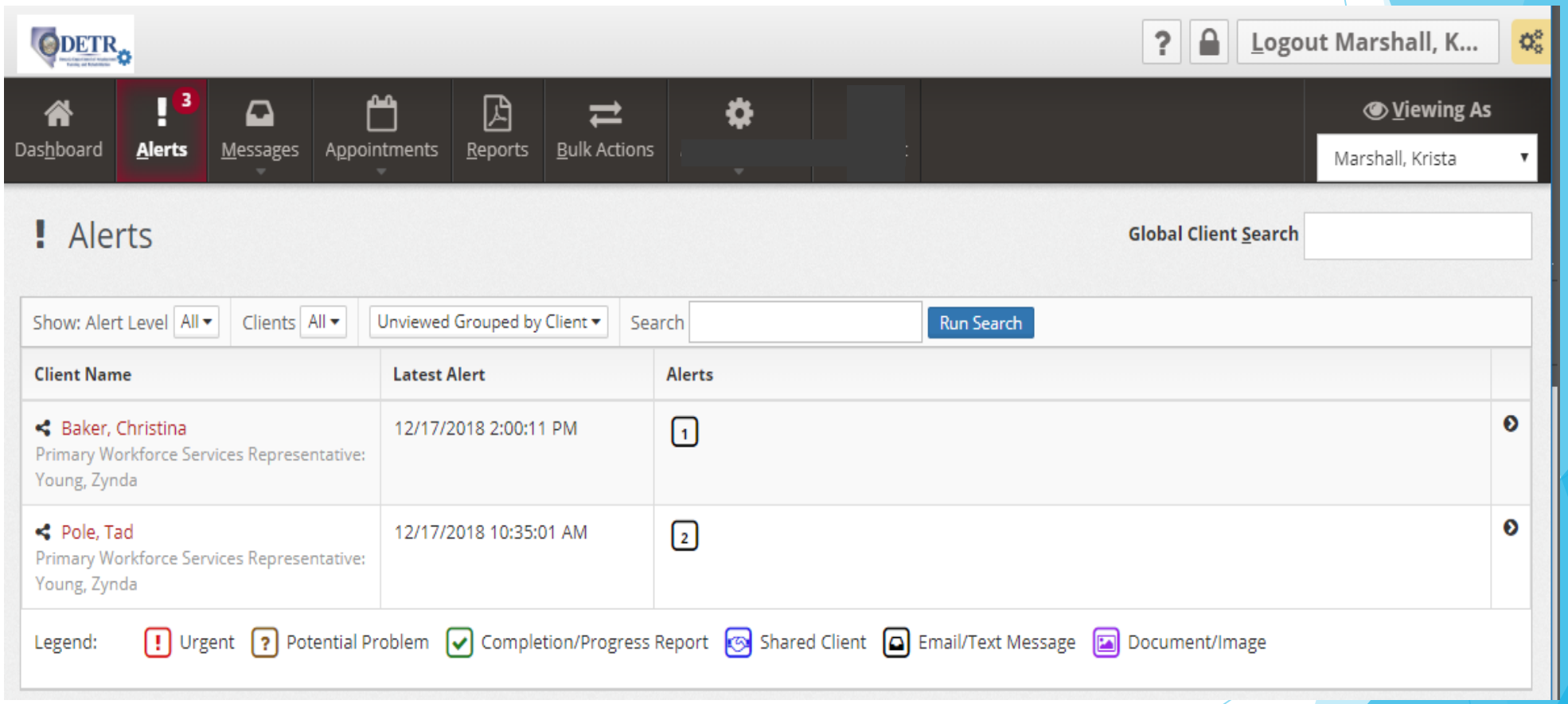
(Note: this doesn't have to be done each time you log in)



The Dashboard Widget will display on the Staff Dashboard

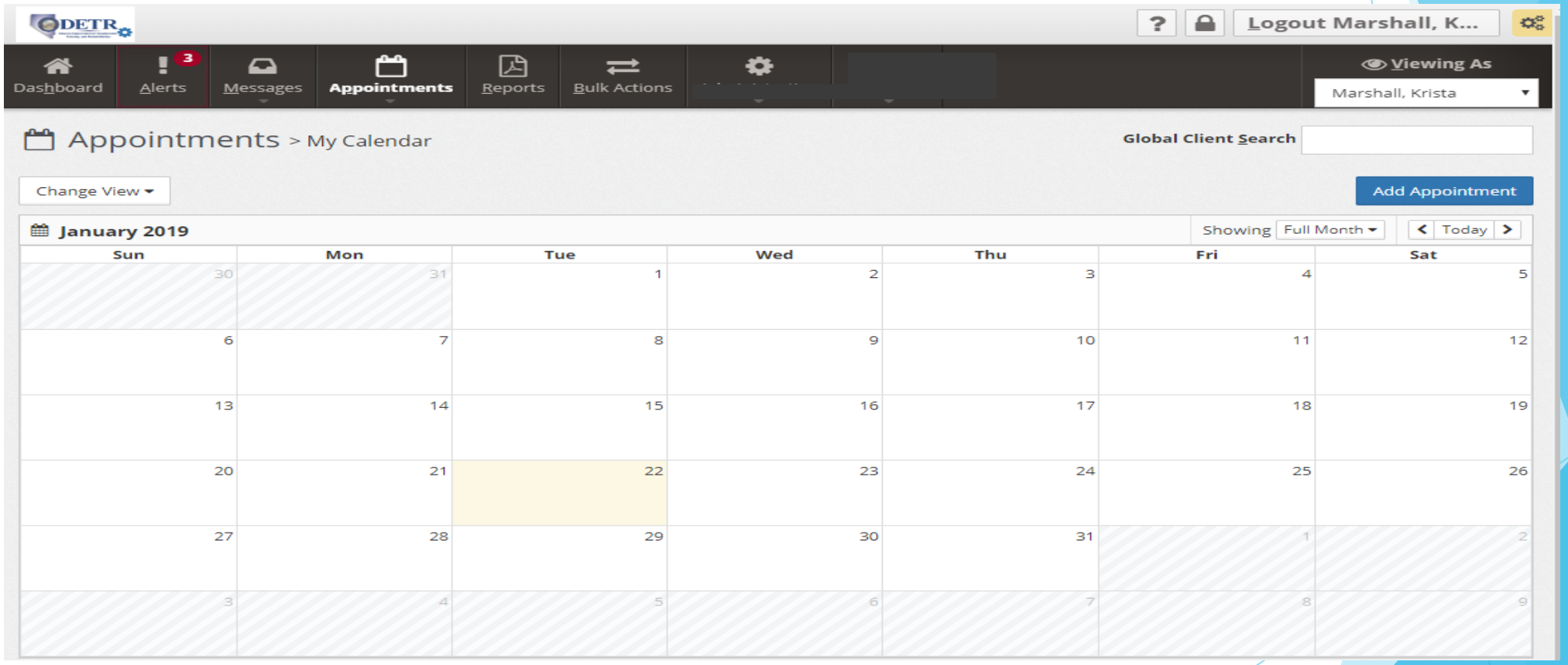
When using the SARA Widget from the Dashboard to access SARA:

- **Alerts – Displays for the ENTIRE CASE LOAD**



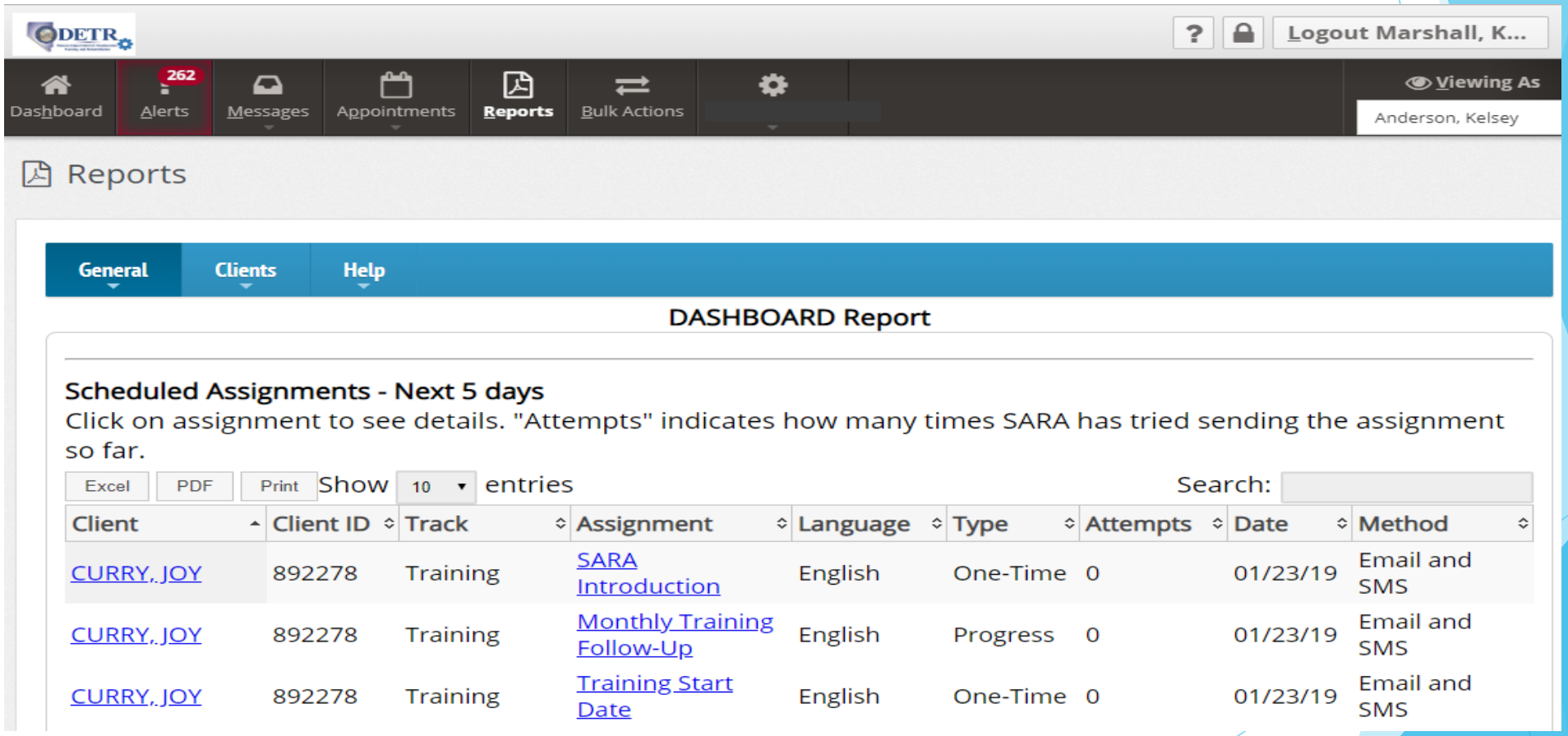
When using the SARA Widget from the Dashboard to access SARA:

- **Calendar – Displays My Calendar**



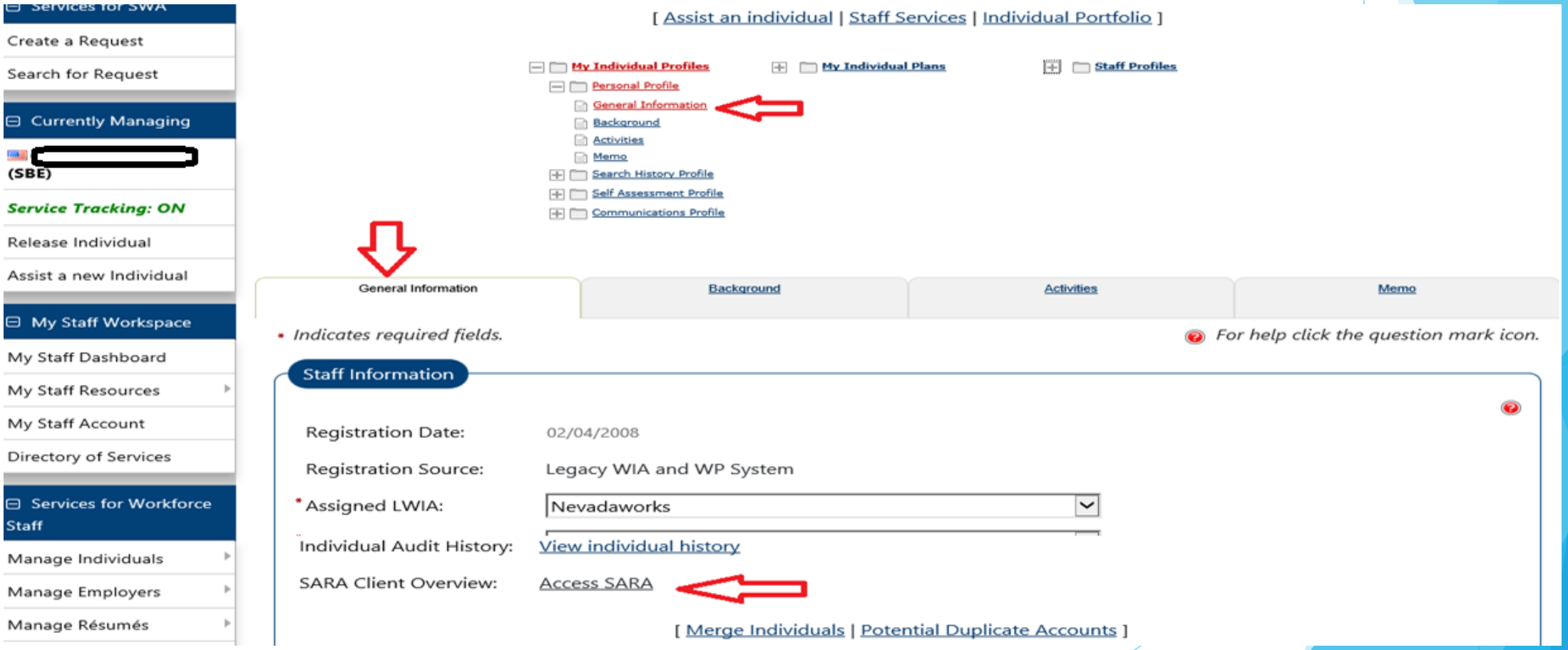
When using the SARA Widget from the Dashboard to access SARA:

- **Reports – Displays for General, Client, and Help**

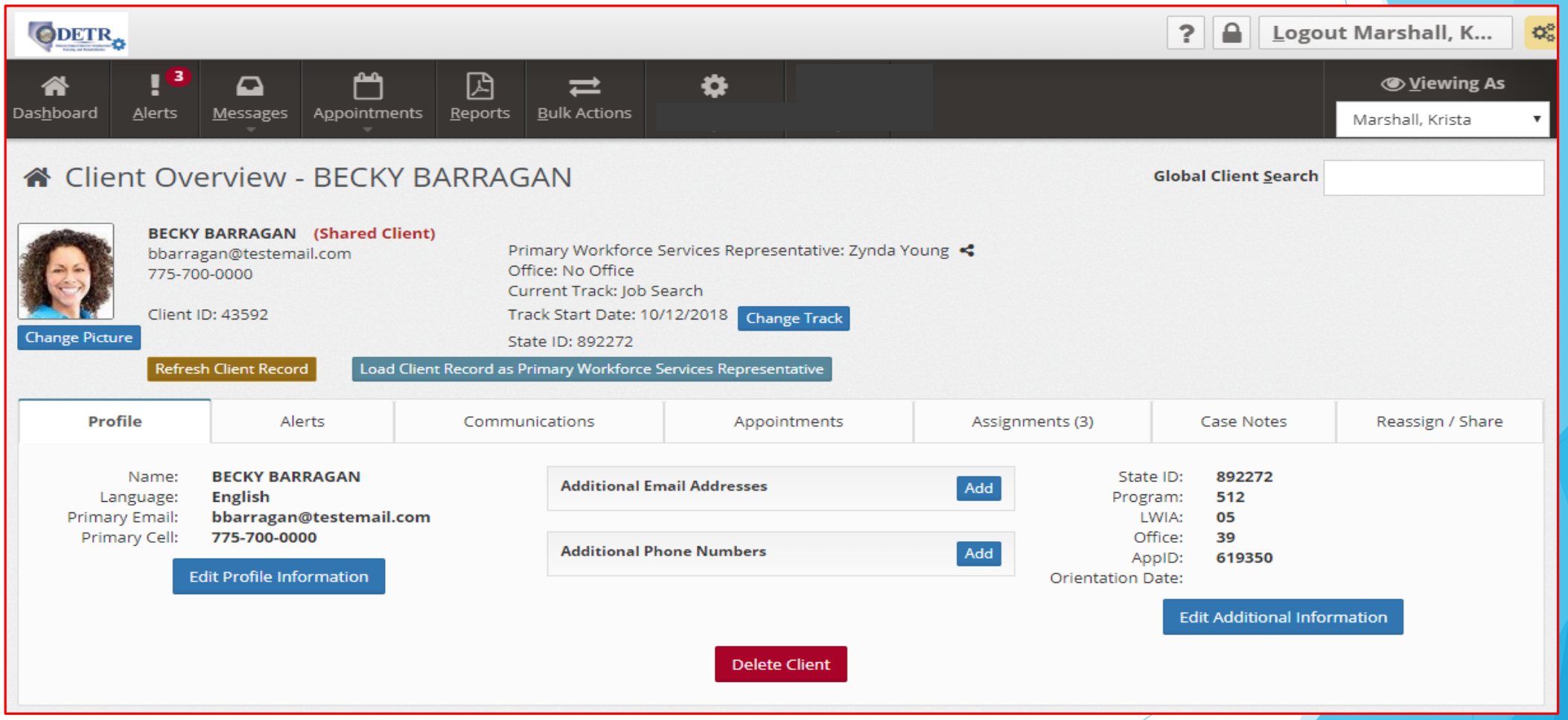


Accessing SARA

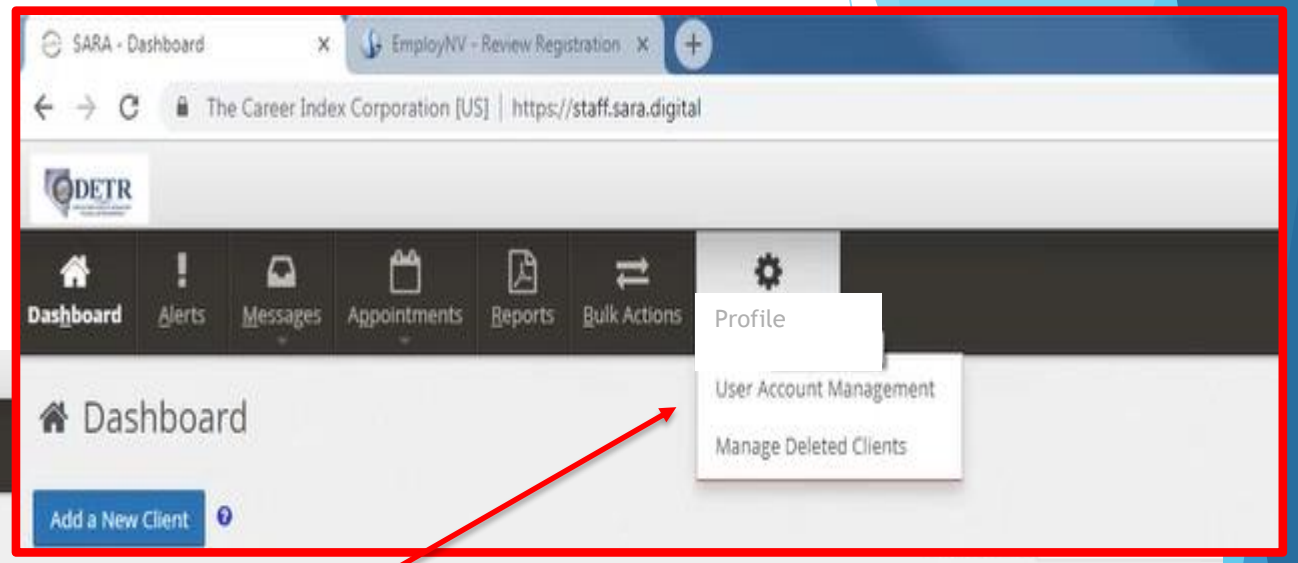
Secondly, through an Individual's General Information Page:

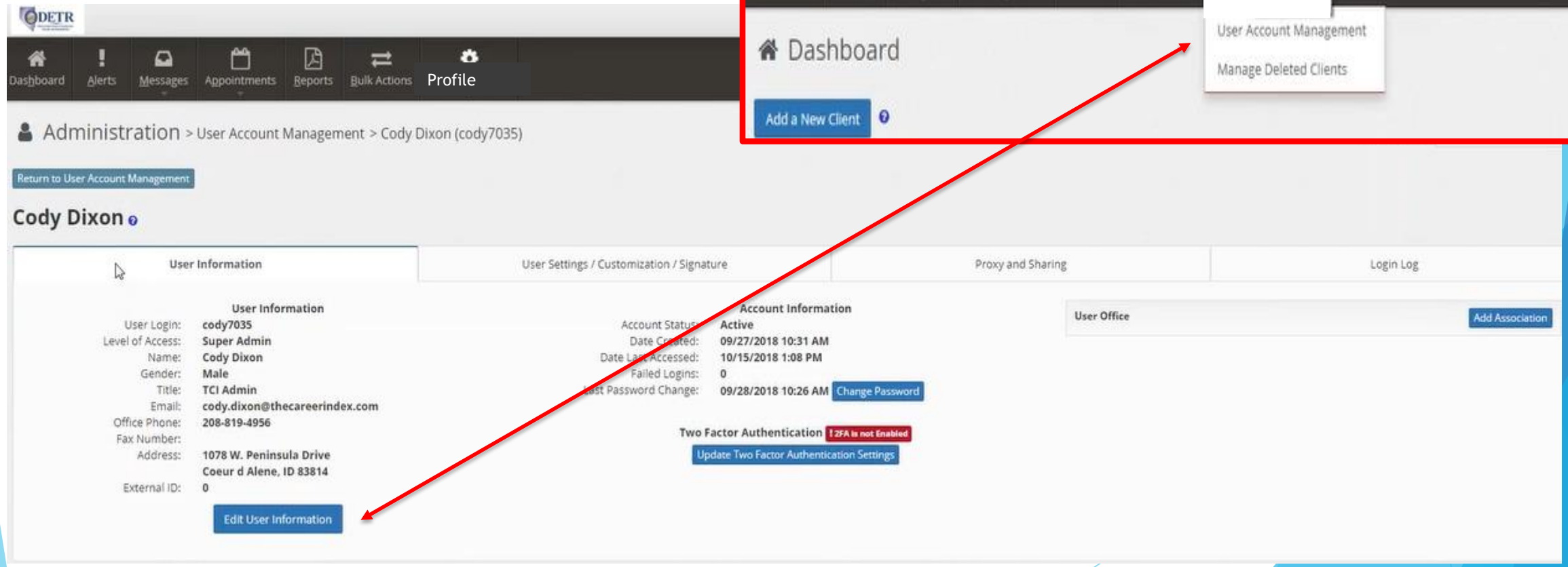


- Displays the Individual's SARA Client Overview Page

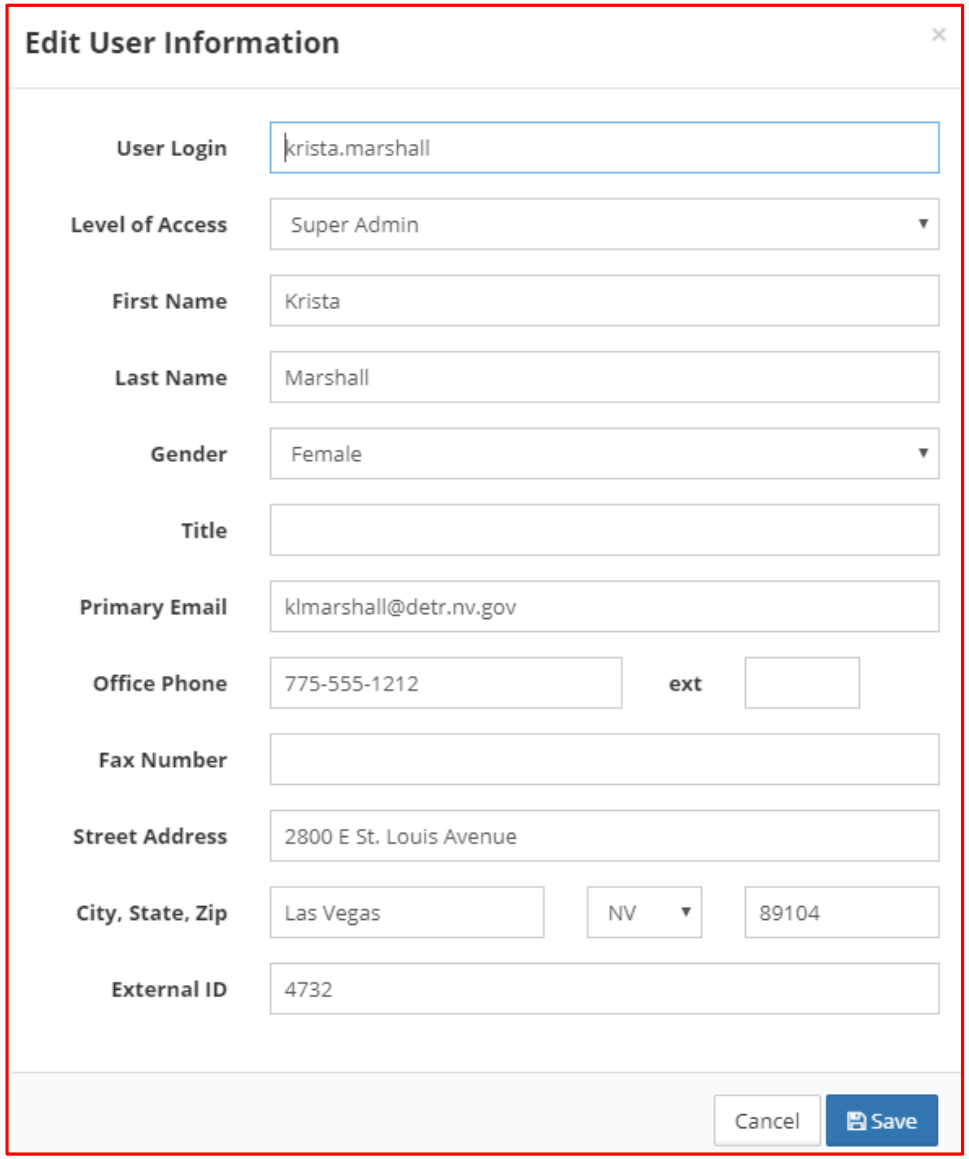


Updating the User Profile

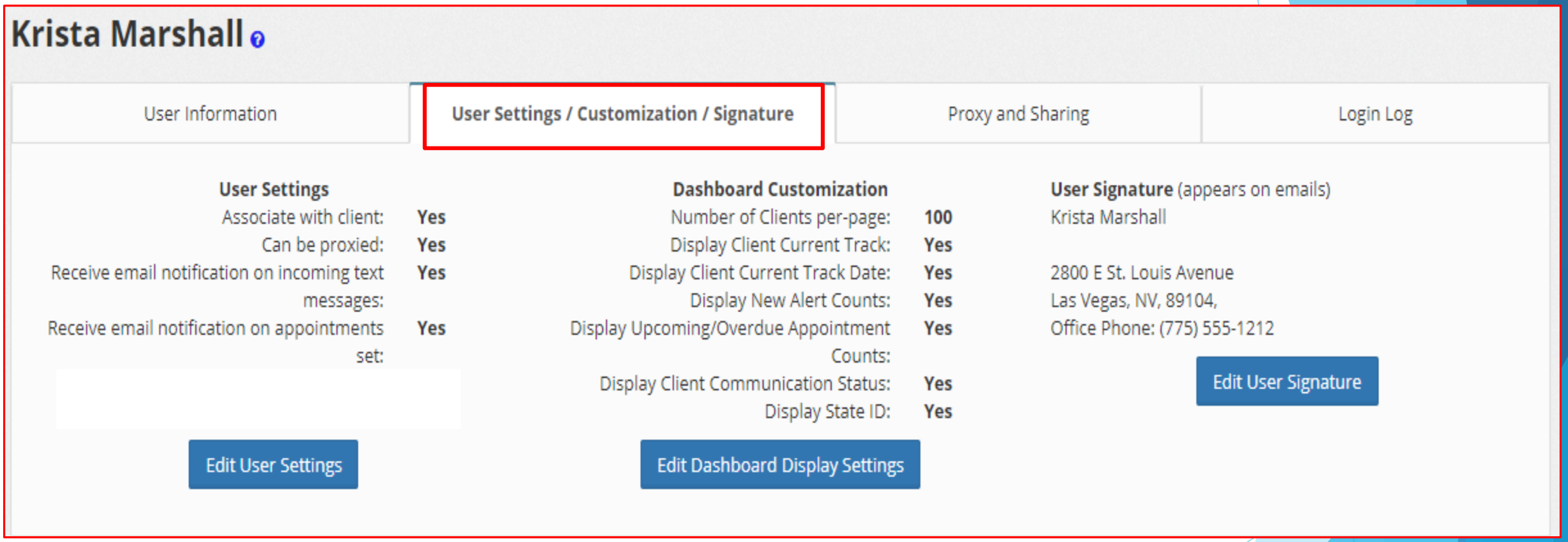




Click on **Edit User Information**, make changes, and **Save**



Click on **User Settings / Customization / Signature** tab



Edit User Signature and Save

User Signature (appears on emails)
Krista Marshall

2800 E St. Louis Avenue
Las Vegas, NV, 89104,
Office Phone: (775) 555-1212

Edit User Signature

Edit User Signature

Krista Marshall, Job Developer

WIOA Service Provider Name
2800 E St. Louis Avenue
Las Vegas, NV, 89104
Office Phone: (775) 555-1212 / Cell Phone: (775) 555-1213 / klmarshall@detr.nv.gov

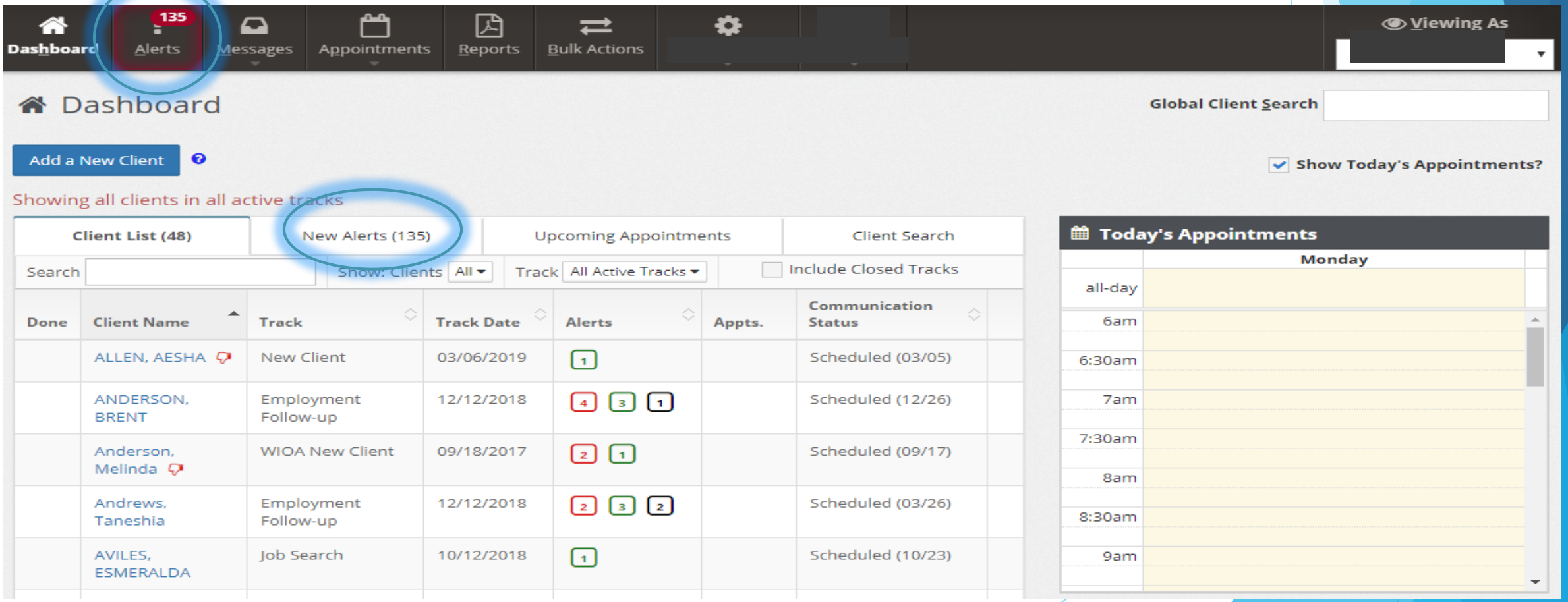
Reset to Default

Cancel

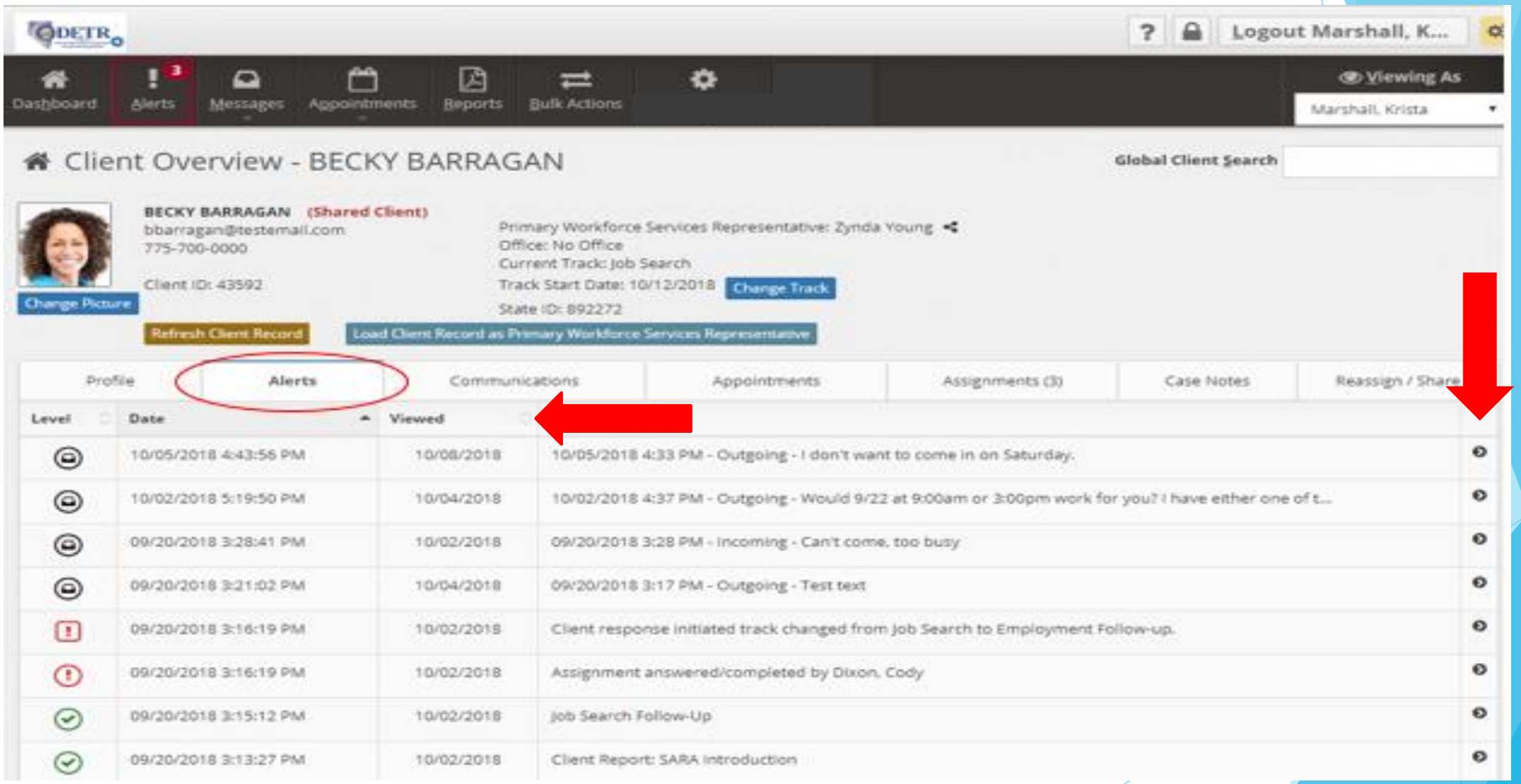
Save

Where Do I Find Alerts and What Are They?

Select Global Alerts from the top menu



Select **Alerts** Tab While In the Client Overview



What Are Alerts?

Legend: Shared Client | Cross-Agency Shared Client | Unable to Communicate | Has Not Accepted SARA

Urgent | Potential Problem | Completion/Progress Report | Shared Client | Email/Text Message | Document/Image

Shared Client	Client is being shared between staff (WIOA, WP, CEP, JVSG, etc.)
Cross-Agency Shared Client / Shared Client	Not currently being used. This will be in a future enhancement when the client is being shared between staff (WIOA, WP, CEP, JVSG, etc. **AND** BVR)
Unable to Communicate	Client contact info is bad or the client has asked not to receive automated communication
	Client has not accepted SARA
Email/Text Message	Client or staff has communicated using SARA manually via text or email
Document/Image	Client has sent a document or image to SARA (**Note:** these items must be approved by staff before they are sent to EmployNV)

What Are Alerts?

- **Red Alerts - Urgent - Needs Immediate Attention**

Examples:

- All Contact Methods are bad
- Individual asked a question or asked to be contacted
- Responded that they would be coming to or not coming to an appointment

What Are Alerts?

- Yellow - Potential Problem - SARA Needs Direction

Examples:

- Individual responded with free flow text, but did not ask to be contacted
- Track ended

What Are Alerts?

- **Green - Normal Progress/Completion Report - No Direction Needed**

Example:

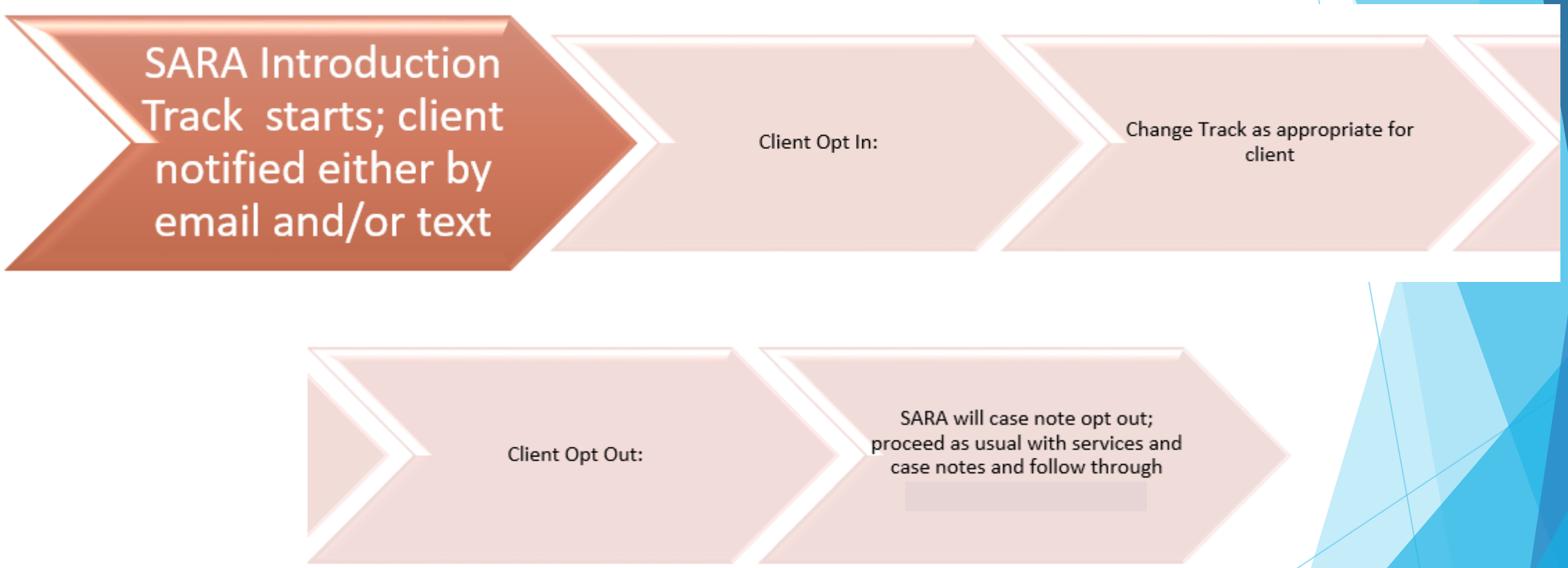
- Assignment ran and response given

When and Why Do I Use SARA?

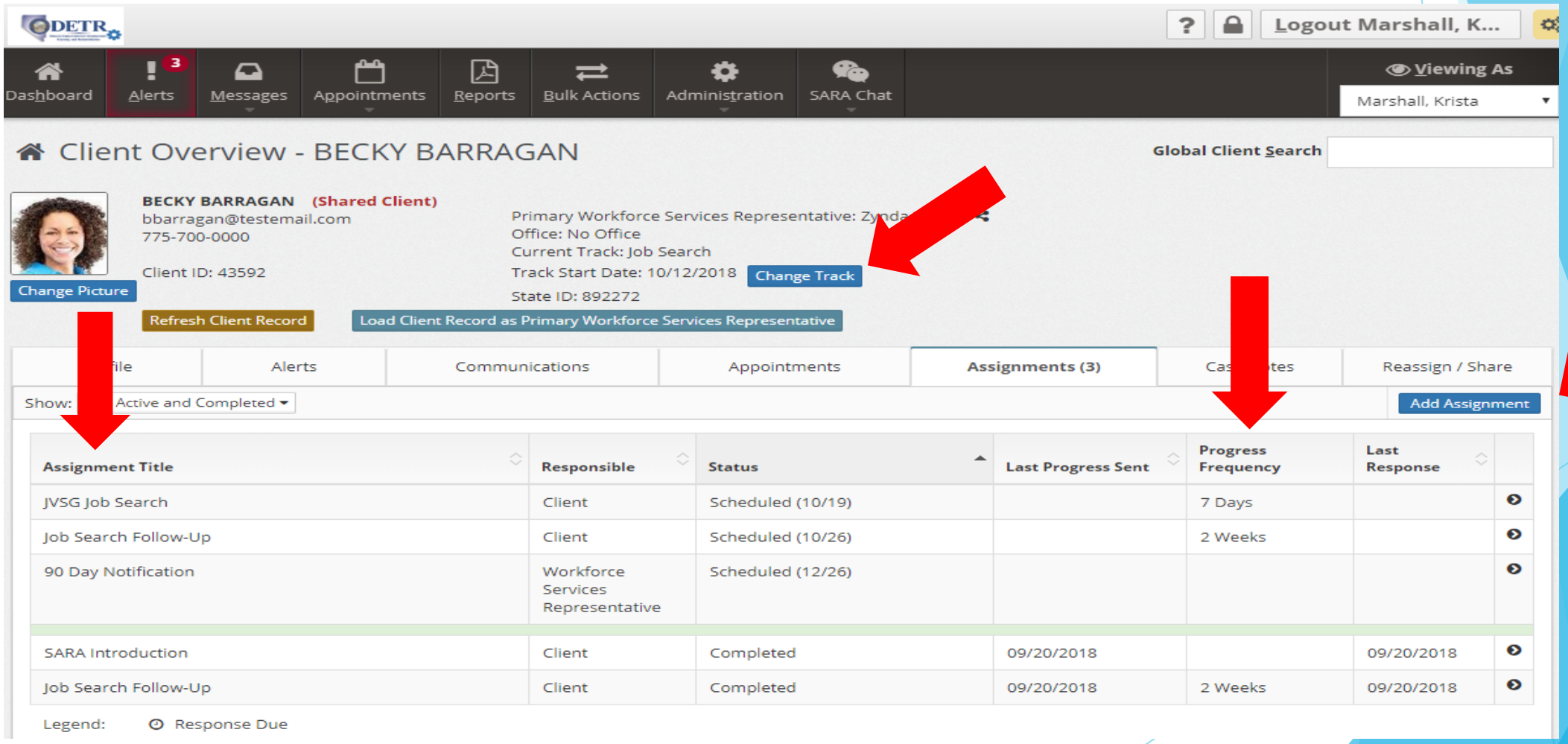
- **Automated** - Follow any Program or Board guidance regarding automated tracks
  - A short phone number (34459) is used
    - This is the number SARA is referring to when asking for acceptance during the Introduction assignment
    - If the Individual declines, the short number cannot be used for automatic track communication
    - All communications are sent to EmployNV as a Case Note
- **Manual** - Staff Can Use SARA to manually communicate with an Individual
  - A long phone number (775-430-4493) is used
    - No Introduction assignment is needed
    - Staff can use the long number to schedule appointments and an appointment reminder will be sent
    - Staff can send out specific text messages or notify the Individual through bulk actions regarding upcoming events
    - All communications are sent to EmployNV as a Case Note

Automated Tracks

- WIOA Participation creates the SARA Introduction Track, **"WIOA New Client"**



- **Tracks Must Be Assigned For Each Individual So SARA Knows What To Do**
  - Follow any Program or Board Guidance Regarding Which Track And When
  - Manual Assignments/Tasks Can Be Added At Any Time



Important Notes

- When a client is participating in a WIOA track, your program takes precedence due to reporting requirements and should not be changed
  - The Veterans, REANV / RESEA, Generic (CEP) programs must leave the track set by WIOA in place, but other program staff may use SARA to communicate manually with clients or set manual tasks to run in conjunction with your track
  - Notify the Board if you notice a change to your track
- SARA only allows for one track to run at a time
- The Case Manager in EmployNV will be the Case Manager assigned in SARA. The Case Manager in SARA must share the Individual with other Agency or Office Staff in order for any action to be taken on the Individual's record
- The Case Manager can send text/email notifications, set manual tasks/assignments, and set manual appointments but cannot adjust the track

Automated Tracks

Tracks are a key event in a client's progress and should match a participant's status (i.e. training, job search, follow-up).

Additional **Tracks** Include:

- Training
- Job Search
- Employment Follow-up
- Temporary On Hold
- Post Employment
- Closed, No Follow-up

Automated and/or Manual Tasks

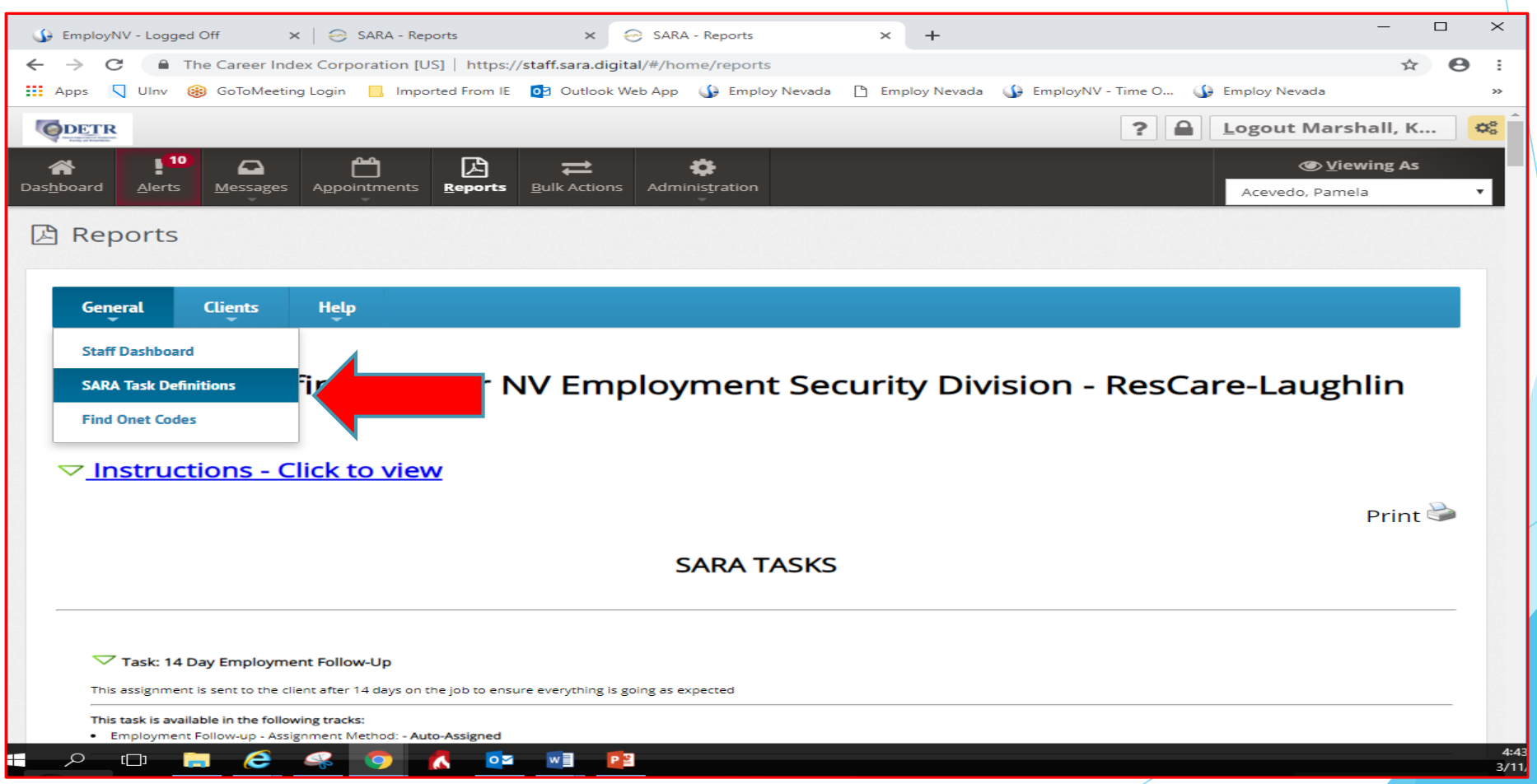
Each track has different assignments or tasks associated with it.

Some Tasks Include:

- Training Start Date Task is available in the Training Track – **Auto-assigned**
- Monthly Interrupted Service Follow-up Task is available in the Temporary On Hold Track – **Auto-assigned**
- Job Search Follow-up Task is available in the Job Search Track – **Auto-assigned**
- Monthly Training Follow-up is available in the Training Track – **Auto-assigned**
- Proof Follow up is available in all Tracks – **Manual assignment**
- Employment Follow-up (30 day) is available in the Employment Follow-up and Post Employment Tracks – **Auto-assigned**
- 90 Day Notification (for staff) is available in the Job Search and Youth Job Search Tracks – **Auto-assigned**
- OJT – First Week is available in the On the Job Training Track – **Auto-assigned**

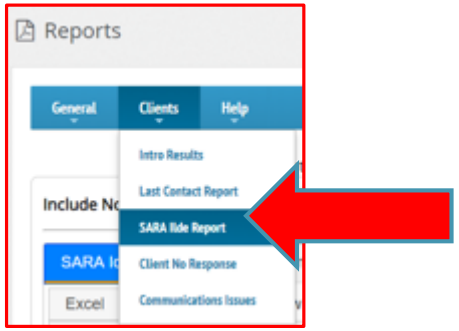
Tools

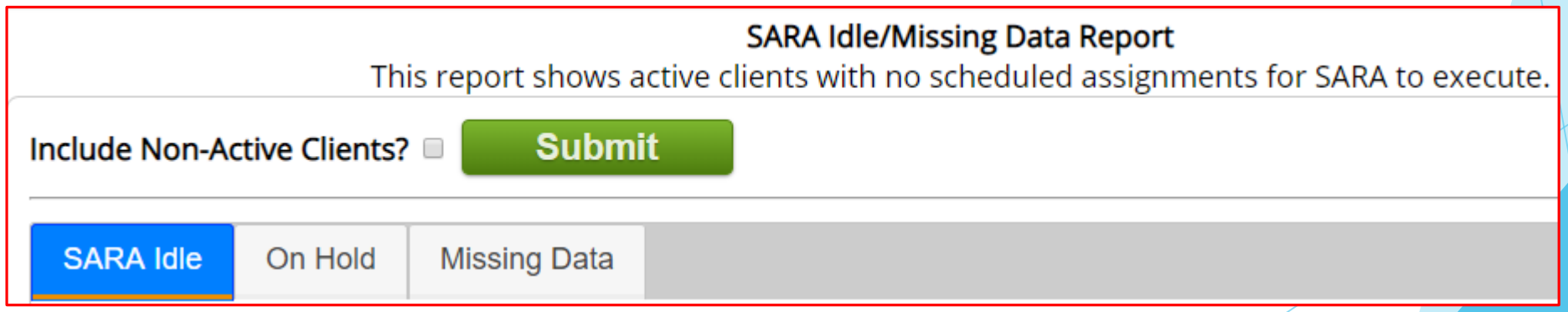
- Reports > General > SARA Task Definitions
  - Gives details on what instructions have been provided to SARA on how to follow-up with clients and staff



Tools

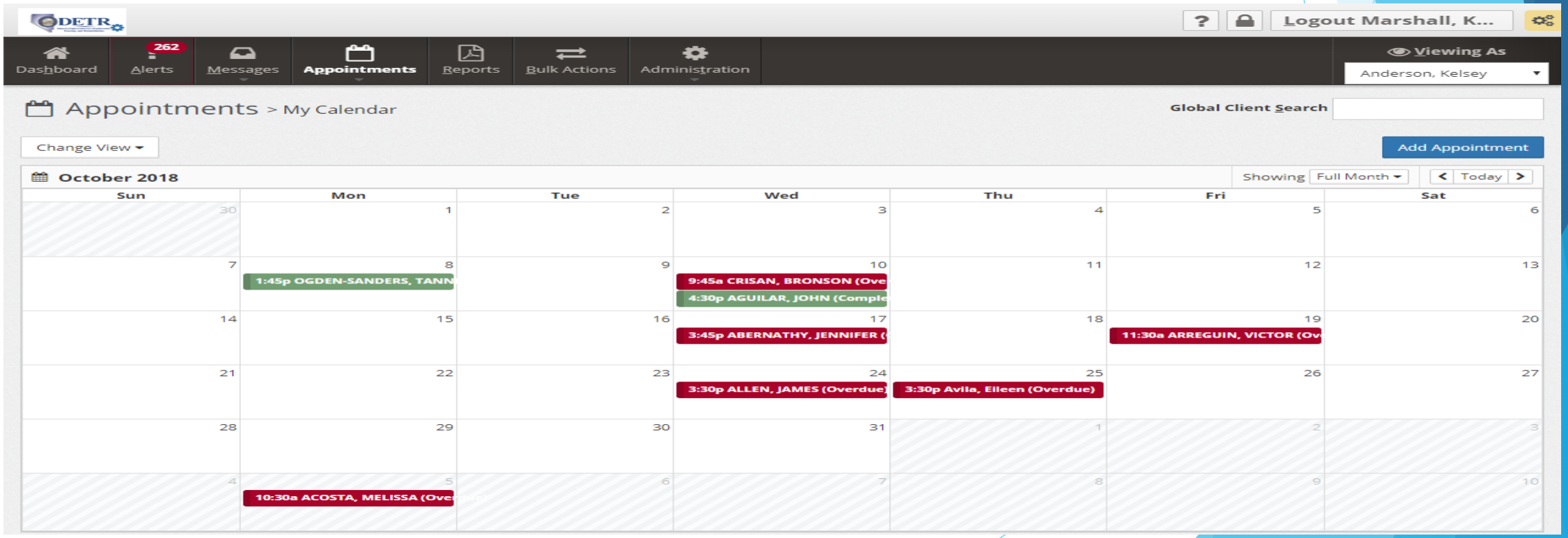
- **Reports > Clients > Idle Report**
  - Gives details on which active clients have no scheduled assignment, those clients who are on hold, or those clients where contact information is missing





Tools

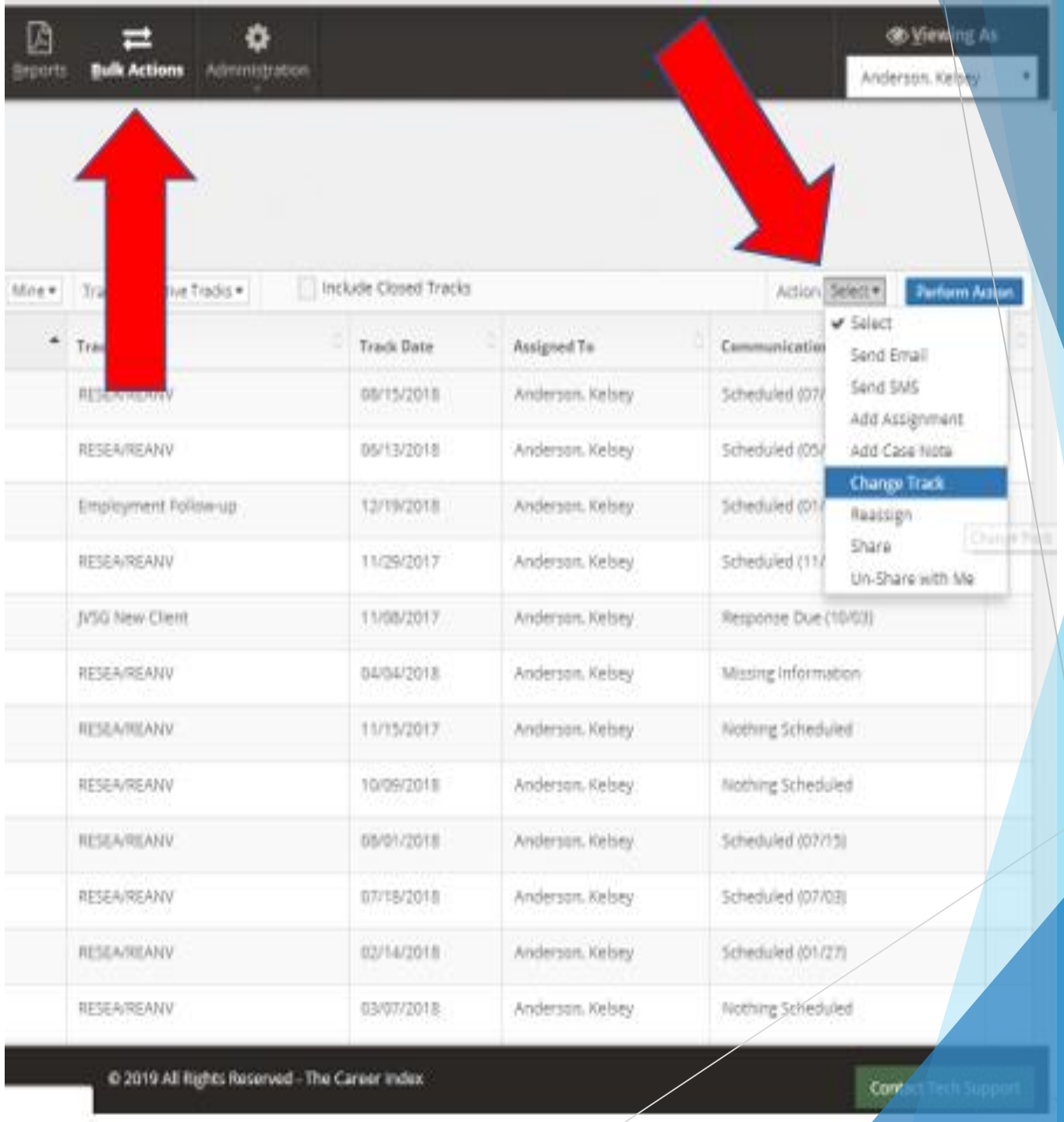
- Calendar
  - Schedule Individuals for appointments
  - See at a glance your daily schedule
  - SARA sends out a reminder to the Individual 1-day prior to the appointment



Tools

- Bulk actions
  - Used to contact multiple Clients regarding:
    - Job Fairs
    - Employer hiring events
    - General Follow-up

    Note: The message will appear personalized and will not appear as it was sent as a group action
  - *Can also be used to:*
    - *Add assignments*
    - *Add Case Notes in EmployNV*
    - *Share the selected client(s) with another staff member in the office*



Tools

- Questions
  - Supervisors/Managers
  - Local Board
  - Contact Tech Support button (located in SARA on the bottom right hand corner of each page)