



## WELCOME TEAM CUSTOMER FLOW

### Customer Enters Center

### Security and/or Signage Directs to Front Reception Desk

#### Receptionist Greets Customer:

- Thanks Customer for coming
- Inquires if new or returning Customer and purpose of visit
- Triage: refers out, directs to service points (including all PGWIN Centers, partners, programs, services, UI Claim File, recruitments, etc.)
- Answers questions about Network products & services, community resources
  
- New Customers and Returning Universal Services Customers (Not Enrolled)  
Gives brief scripted overview of process, purpose, time estimates  
Follows Hand-Off Procedures to Welcome Team Crew:
  - Confirms Customer has Right-to-Work documentation (picture ID, SSN, Selective Service or alternate docs) for verification by Welcome Team
  - Calls Welcome Team Crew Point of Contact (rotational schedule) to inform of waiting Customer(s)
  - Customers lacking the required eligibility documentation –
    - Receptionist will schedule return time in Front Desk Appointment Calendar
    - Receptionist will give Customer Appointment Card for priority service over walk-ins
  
- Returning Customers Who Have Completed the Welcome Team Process or Enrolled (JTA) Prior to 07/01/2008:  
Swipes Customer's Scan Card through mini-magnetic Card Reader  
Confirms Customer Profile in Virtual OneStop (VOS) and name match  
Verify in VOS that Customer has completed Welcome Function (checks for documented services / case note or is enrolled)  
Issue new PGWIN Scan Card to returning customers enrolled prior to 07/01/08; record number in VOS Personal Profile  
Records Front Desk Check-in, Planned Services in VOS Activities Screen  
Directs to appropriate Service Points (Teams, YOC, Veterans, Partners, Recruitments, UI, Workshops, TAA, Community Resource Referrals)  
Follows Hand-Off Procedures to Skills Development & Solutions Teams:
  - Calls Skills Development or Solutions Teams' Points of Contact
  - If Team member is available, directs Customer to appropriate Team Member who comes to Lobby to meet Customer
  - If Team member is not available, schedules return appointment in VOS (**VOSteps:** Manage Communications, Manage Appointments, Add Appointment) and gives Customer Appointment Card

- Calls YOC, Veterans, TAA, Partners, to refer Customers as appropriate
  - Issues 2<sup>nd</sup> floor or 3<sup>rd</sup> floor badges for appropriate activity / event
  - Directs Customers to have a seat at 3<sup>rd</sup> floor reception, wait for staff
- External Referrals: Gives Customers info re: alternate PGWIN Centers, One-Stop Career Centers, disability-related resources, libraries, UI, etc.

#### Welcome Team Crew

- Greets customer in lobby, gives scripted overview of initial visit
- Escorts customer to Welcome Team area; further identifies purpose of visit



## WELCOME TEAM CUSTOMER FLOW

### Welcome Team Crew (continued)

- Schedules Return Appointment (in Front Desk Appointment Calendar) for Customers lacking eligibility documentation or sufficient time
- Data Collection: Self-Administered (VOS) Co-Registration – Staff Assistance as needed: Staff will access VOS thru generic Welcome Team log-in
  - Verify customer is not registered in VOS
  - Direct Customer to create standardized USER ID:  
Last name, Initial First Name, Last 4 digits SSN (ex: SMITHJ4456 for John Smith last 4 digits SSN 4456)
- Issues new PGWIN Scan Card to customer; records number in VOS Personal Profile
- Facilitates Online Self-Administered VOS Basic Job Skills Assessment, assists as necessary

### Welcome Team One-on-One Interview

- Conducts Structured Interview - Initial Career Coaching / Planning
  - Schedules return appointment in VOS if Customer lacks information or time to complete Welcome Process (**VOSteps**: Manage Communications, Manage Appointments, Add Appointment; give Customer Appointment Card)
  - Verifies Picture ID, Right to Work; Selective Service Documentation if applicable
  - Reviews Customer Center Standards, EEO/Customer Complaint, Information Release Forms – Verifies in VOS Common Intake Screen
  - Review VOS Job Skills Assessment results
  - Job Readiness Assessment: Reviews and/or completes VOS online Common Intake that addresses and verifies (as appropriate)
    - Academic Levels
    - Work History
    - Certifications
    - Desired Occupation
    - Individual Barriers to Skill Development and Employment
    - Financial Needs and Circumstances
    - Possible Supportive Services Needs
    - General Eligibility
- Recommends Services, Activities to Customers
- Completes Program Enrollment for WIA Adult Core B (Wagner-Peyser Enrollment done automatically with VOS registration)
- Records Services / Activities in VOS (**VOSteps**: Case Management, Activities, Activity History/Service Plan, Add Services) in accordance with pending proscribed service activities that trigger enrollment for performance
- Completes VOS Case Note Documenting Services & Recommendations
  - Uses Case Note Templates (*to be developed*)
  - Documents initial Job Skills Assessment service
  - Case Note establishes the need for significant staff involvement and documents referral to Skills Development, Solutions Teams
  - Documents resource and product referrals
- Follows Hand-Off Procedures to Skills Development & Solutions Teams
  - Calls Skills Development or Solutions Teams' Points of Contact
  - If Team member is available, escorts and introduces Customer
  - If Team member is not available or Customer is out of time, schedules return appointment in VOS (Manage Communications, Manage Appointments, Add Appointment) and gives Customer appointment card
- Refers out to appropriate entities for needed products and services